OVERVIEW

Brief overview of module processes.

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Submitting a Change Order Request

This section demonstrates how to navigate to the OnBase Change Order Request form and enter information for submission.

1. Access the OnBase Change Order Request form.

2. The OnBase login page displays. Enter your SJSUOne ID and password.

Note: Check your browser settings to make sure you allow pop-ups from this site.
The Change Order Request form displays.

The change order request form is comprised of four sections: Department Information, Purchase Order Information, Action Requested and Change Order Backup Document(s).
Department Information

The department information section contains details about the change order request, including requester and approver information, request and approval dates, and change order status. Information in this section is populated from data tables.

The following fields display under the Department Information header:

- CO Requester Name (populated)
- CO Requester Email (populated)
- CO Request Date (populated)
- CO Approval Status
- CO Approver Name (populated once PO selected)
- CO Approver Email (populated once PO selected)
- CO Approval Date (populated once approved)
- Revision Number

Navigate to the Purchase Order Information header.

1. Enter the Purchase Order ID number you are submitting a change order request for. Tab out of the field.

The following fields will populate:

- Supplier Name
- Supplier ID
- Buyer Name
- Department ID

Note: The Dept Approver drop down list populates based on access to the deptID identified in the chartfield on the first line of the PO.

1. Select the appropriate Dept
Approver.

2. Dept Approver Email field populates based on selection

**Purchase Order Information**

The purchase order information section contains details about the purchase order you are requesting changes to. Once the purchase order number is entered, OnBase populates a number of the fields from data stored in CFS data tables.

Navigate to the the Purchase Order Information header.

1. Enter the Purchase Order ID number you are submitting a change order request for. Tab out of the field.

The following fields will populate:

- Supplier Name
- Supplier ID
- Buyer Name
- Department ID

*Note: The Dept Approver drop down list populates based on access to the deptID identified in the chartfield on the first line of the PO.*

2. Select the appropriate Dept Approver.

3. Dept Approver Email field populates based on selection
**Action Requested**

With each change order request, the requester has the option to add a line(s) and/or change existing line(s). Based on the selected change type, various fields are required. The requester also has the ability to request the entire PO be cancelled, although for Contracts & Purchasing Services to process the request, there must be no activity on the PO.

**Request Summary and Additional Details**

1. The Request Summary and Additional Details field is a required field, intended as a space to provide details related to the change order request.
2. To add a line, click the ‘Add’ button to the right.
3. To change an existing line, click the ‘Add’ button to the right.

**Add a Line**

Once you’ve clicked on the ‘Add’ button to the right of the header, additional fields for completion display:

- Quantity (required)
- UOM (static)
- Unit price (required)
- Ext Amt (Calculated)
- Description (required)
- Account (required)
- Fund (required)
- DeptID (required)
- Program
- Class
- Project

Enter required information. Add additional lines if necessary.
Change Existing Line(s)

When line changes to an existing purchase order are needed, users will need to select a change type. Based on the selection, required fields display for data entry. Below are screen shots and corresponding fields for each change type.

Change Type: Line Description

When the change is to update the line description, the following fields are required:

- Line #
- Desc From (what the current line description reads)
- Desc To (the line description you'd like to have on the PO line)

Change Type: Unit Price

When the change is to update the unit price on a line, the following fields are required:

- Line #
- Unit Price From (the current unit price established for the line)
- Unit Price To (the updated unit price amount)

Change Type: Quantity

When the change is to update the quantity on a line, the following fields are required:

- Line #
- Qty From (the quantity originally indicated on the PO line)
- Qty To (the updated quantity...
**Change Type: Cancel Line**

When the change is to cancel a line on the PO, the only required field is Line #.

*Note: To cancel a line, the line must have no activity. Buyers cannot cancel any part of a line that has been received, invoiced, or paid.*

**Change Type: Close Line**

When the change is to close a line on a PO, the following fields are required:

- **Line #**
- **Reduce By** (the amount remaining on the line, which, once reduced, will net to zero)

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**Change Order Backup Document(s)**

The OnBase Order Request form allows users to upload backup documents to support the action requested. Backup documents are not required. Any documentation uploaded as support for the change order request will be stored in OnBase and accessible to department users via the Document Retrieval button on the requisition in FTS.

1. Click on the Attach PUR Change Order Backup Doc
2. Select the document(s) you’d like to attach.
3. Click Open
4. The file path for the newly attached document will display above the button.
Submit

Once all appropriate information is entered into the change order request form, you will click Submit. Upon submission, email notifications go to both the requester and department approver.

Once you hit Submit, you will be redirected to a Thank You screen, where you have the option of submitting another change order or closing the window.

Additionally, email notifications go to both the requester (you) and the person you selected as the Department Approver.

Change Order Submitted

Thank you

Your change order request was submitted successfully and has been sent to the identified department approver for review and approval.

Have another change order request to complete? Visit OnBase Change Order Request Form.

Close this window if complete.
Department Approver: Reviewing and Taking Action on a Change Order Request

A department approver is responsible for reviewing requested change orders, taking action to either approve or deny the requested change.

1. An individual receives an email notification when they've been selected as the appropriate approver from the drop-down list for a given change order. Approver names are populated based on their ability to approve for the deptID indicated on the purchase order.

2. Click on the hyperlink provided in the body of the email message.

3. The following page displays. Log in to OnBase with your SJSUOne ID and password.
4. The following page displays. The Top section is the Department Approver’s inbox, displaying any change orders awaiting review.

5. Click the change order request to display the details of the request in the lower section of the window.

6. Take action on the request by either selecting:
   - PUR: Approve CO
   - PUR: Deny CO

   Note: If Deny CO is selected, a deny reason is required. The reason entered will be communicated to the requester via email message.
Email Notifications

The OnBase change order form has built-in workflow notifications that are distributed based on form actions. The following images are examples of email notifications associated with change order requests.

**Message to Requester: Change Order Submitted for Approval**

*Sent upon hitting the submit button.*

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**Message to Approver: Change Order for Review and Approval**

*Sent to selected department approver after requester submits change order form.*
Message to Requester: Change Order Approved

Sent to requester once change order request is approved.

Message to Requester: Change Order Denied

Sent to requester when change order is denied by department approver. Action includes deny reason identified by approver.

Example:

Change Order Request for PO # 3000020354 is Approved

Ray Requester,
Your change order request for PO # 3000020354 was approved by Ann Approver on 2/23/2017 8:41:09 AM and forwarded for processing. You will receive notification when the change order request is complete.

Thank you,
Contracts & Purchasing Services

Change Order Request for PO # 3000021034 is Denied

Ray Requester,
Your change order request for PO # 3000021034 was denied by Ann Approver on 2/2/2017 4:11:25 PM for the following reason: no additional items anticipated on this PO

The change order request will not be processed.

Thank you,
Contracts & Purchasing Services
Message to Approver: Final Reminder – Change Order for Review and Approval

Sent when 30 days from original submission have passed. Change order request is cancelled if no action is taken at day 31.

Final Reminder - Change Order to PO: 3000020355

Ann Approver,

A change order request was submitted by Ray Requester for your approval on 2/2/2017 3:30:28 PM and is still awaiting your approval. Please click on the following OnBase Link to review and approve the change order request.

This is your final reminder. If no action is taken on this Change Order Request today, it will be cancelled tomorrow.

Thank you,
Contracts & Purchasing Services