

Approval of Electronic Change Orders

Process Flow

Change orders are used to make changes to a purchase order to add, delete or cancel. Common changes include increasing the amount ordered or cost, decreasing the amount ordered or cost, cancelling the order. These are the change orders that will require review and approval.

Note: Subcontracts, Construction and Architectural Engineering (AE) types of changes will not use this Electronic Change Order process. Continue to use the established routing process. For Subcontracts, these should be routed to Sponsored Projects Accounting and Construction and AE should be routed to Office of Facilities Services.

The Electronic Change Order will utilize the same routing approval as a Purchase Requisition. The *Commodity* field will identify the “**Electronic Change Order**” and the *Document Text* will list the reason and exact specifics for the change order.

The approval process can be completed in one of two ways, using the Banner Finance module or Finance Self-Service Steps for both will be addressed in this document.

Note: To make a fund change for an Index (indices) or Account Code(s) continue to use the paper form Purchase Order - Fund Change provided on-line and can be found by going to link http://www.nmsu.edu/~boffice/forms/PSRM_PurchaseOrderFundingChangeRequest.pdf

Electronic Change Order Approval using Banner Finance Module

Change orders that include monetary changes (increases, decreases, or cancellations) are submitted using the purchase requisition process.

Approve/Disapprove Using FOAUAPP form

The User Approval form, FOAUAPP allows direct approval of a document or navigation to summary information of a document for review and subsequent approval. Use the User Approval Form to obtain an online list of unapproved documents by document type.

To access the **User Approval** form, type **FOAUAPP** in the Direct Access **Go To...** field and press the **Enter** key.

The **User Approval** form will be displayed.

| NSF | Document Type | Document Number | Change Sequence | Submission | Originating User | Document Amount | Queue Type | Next Approver |
|--|---------------|-----------------|-------------------------------------|-------------------------------------|------------------|-----------------|------------|---------------|
| <input type="checkbox"/> | REQ | R0086023 | <input type="checkbox"/> | <input type="checkbox"/> | DOLAREY | 1,000.00 | DOC | Y |
| Approve: <input type="checkbox"/> | | Disapprove: | | Detail: | Queue: | | | |
| <input type="checkbox"/> | REQ | R0086029 | <input type="checkbox"/> | <input type="checkbox"/> | DOLAREY | 867.68 | DOC | Y |
| Approve: <input type="checkbox"/> | | Disapprove: | | Detail: | Queue: | | | |
| <input type="checkbox"/> | REQ | R0086033 | <input type="checkbox"/> | <input type="checkbox"/> | JGABEL | 2.00 | DOC | Y |
| Approve: <input type="checkbox"/> | | Disapprove: | | Detail: | Queue: | | | |
| <input checked="" type="checkbox"/> | REQ | R0086042 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | JGABEL | 1,500.00 | DOC | Y |
| Approve: <input checked="" type="checkbox"/> | | Disapprove: | | Detail: | Queue: | | | |
| <input type="checkbox"/> | REQ | R0086043 | <input type="checkbox"/> | <input type="checkbox"/> | JGABEL | 1.00 | DOC | Y |
| Approve: <input type="checkbox"/> | | Disapprove: | | Detail: | Queue: | | | |
| <input type="checkbox"/> | | | <input type="checkbox"/> | <input type="checkbox"/> | | | | |
| Approve: <input type="checkbox"/> | | Disapprove: | | Detail: | Queue: | | | |

1. Click the **Next block** to display list of all requisitions needing approval.
2. Click on **Detail** icon.

The **Requisition Approval [FOQFACT]** form will be displayed.

Request: R0086042 JENNIFER L. GABEL Number of Items: 1

Line Item Information

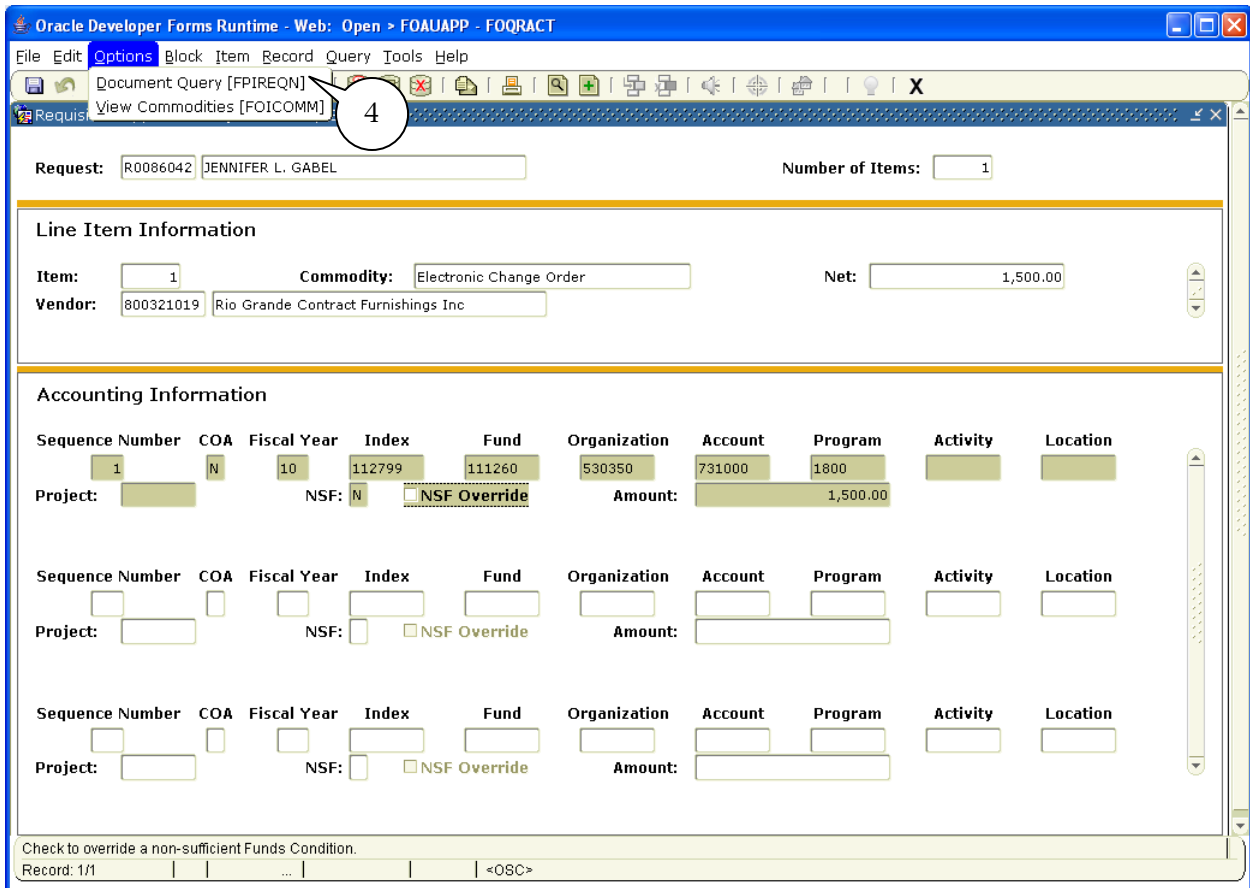
Item: 1 Commodity: Electronic Change Order Net: 1,500.00
Vendor: 800321019 Rio Grande Contract Furnishings Inc

Accounting Information

| Sequence Number | COA | Fiscal Year | Index | Fund | Organization | Account | Program | Activity | Location |
|-----------------|-----|-------------|--------------|--------|--------------|---------|---------|----------|----------|
| 1 | N | 10 | 112799 | 111260 | 530350 | 731000 | 1800 | | |
| Project: | | NSF: N | NSF Override | | Amount: | | | | 1,500.00 |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |

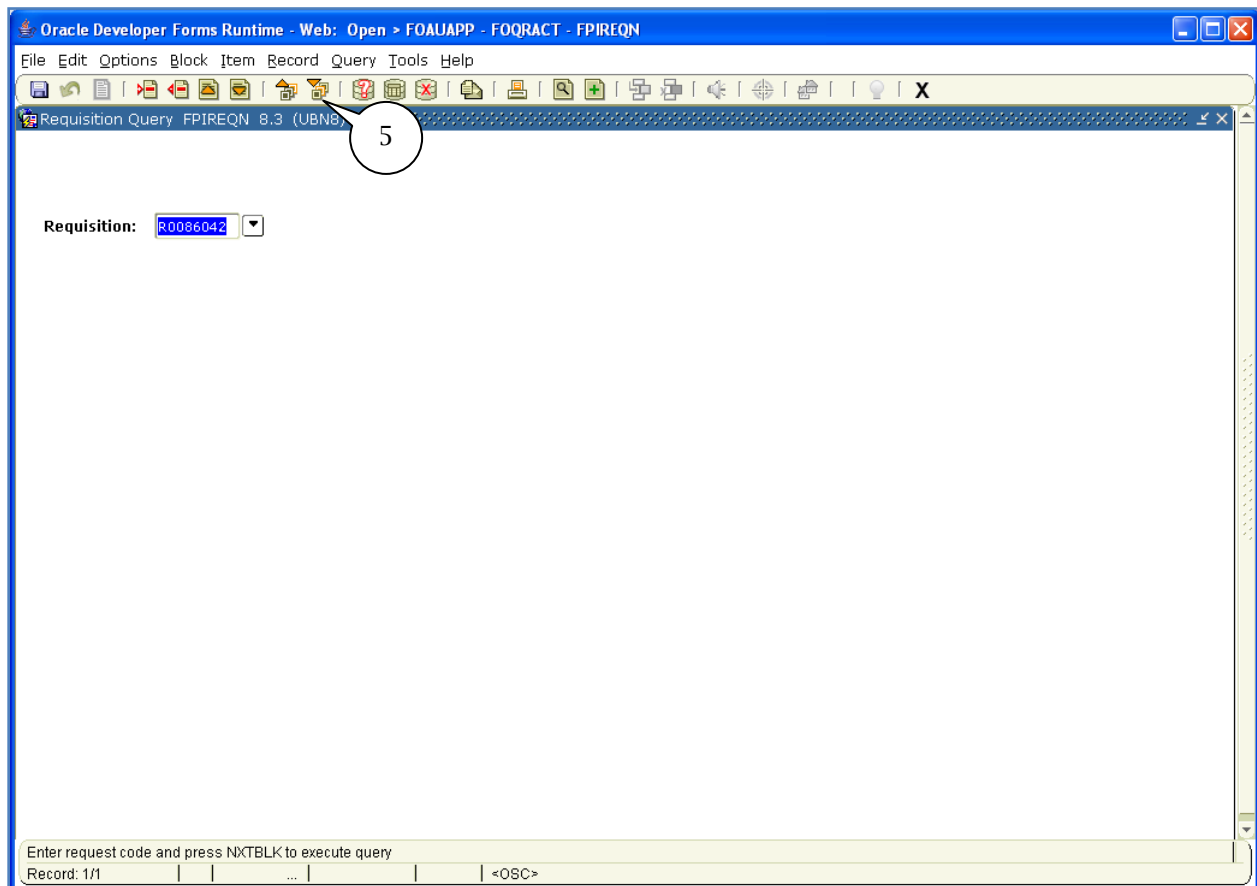
Check to override a non-sufficient Funds Condition.
Record: 1/1 | <OSC>

3. Within the *Line Item Information* block; the **Commodity** field will displays **Electronic Change Order**. This identifies a Change Order versus a Purchase Requisition.

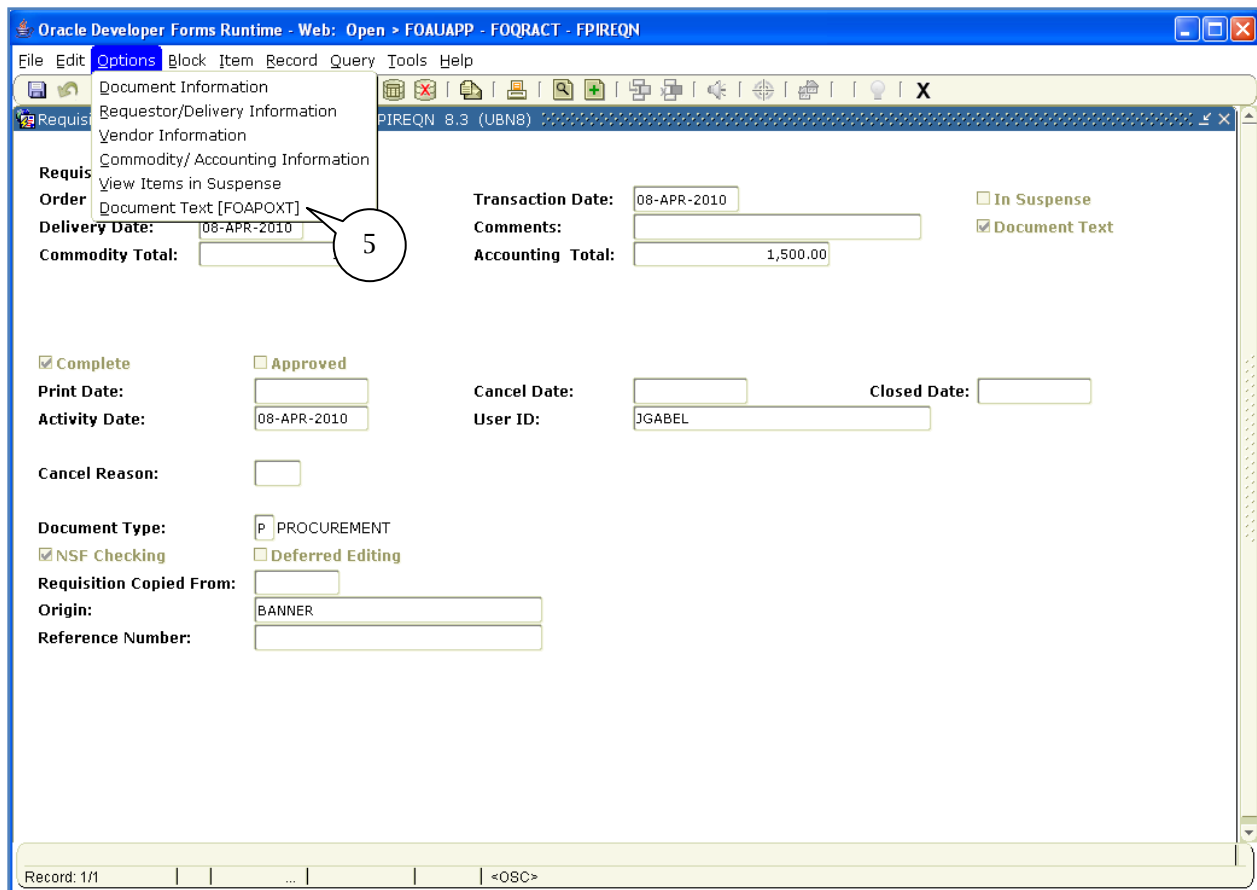


4. From the **Options** menu select **Document Query [FPREQN]**.

The **Purchase Requisition Query [FPIREQN]** form will be displayed.



5. Click on **Next Block** icon.



6. From the **Options** menu select **Document Text [FOAPOXT]**.

Oracle Developer Forms Runtime - Web: Open > FOAUAPP - FOQRACT - FPIREQN - FOAPOXT

File Edit Options Block Item Record Query Tools Help

Procurement Text Entry FOAPOXT 8.0

Text Type: REQ Code: R0086042 Change Sequence: Item Number:

Vendor: 800321019 Rio Grande Contract Furnishings Inc

Commodity Description:

Modify Clause: Copy Commodity Text Default Increment: 10

| Text | Clause Number | Print | Line |
|--|---------------|-------------------------------------|------|
| change order | | <input checked="" type="checkbox"/> | 10 |
| PO number P0080001 | | <input checked="" type="checkbox"/> | 20 |
| Vendor: Rio Grande Contract Furnishings; 800321019 | | <input checked="" type="checkbox"/> | 30 |
| Increase | | <input checked="" type="checkbox"/> | 40 |
| Reason: quantity input incorrectly | | <input checked="" type="checkbox"/> | 50 |
| Action: increase quantity of line item 1 | | <input checked="" type="checkbox"/> | 60 |
| from 1 to 100 for a total line change | | <input checked="" type="checkbox"/> | 70 |
| of \$1500.00 | | <input checked="" type="checkbox"/> | 80 |
| | | <input type="checkbox"/> | |
| | | <input type="checkbox"/> | |
| | | <input type="checkbox"/> | |
| | | <input type="checkbox"/> | |
| | | <input type="checkbox"/> | |
| | | <input type="checkbox"/> | |
| | | <input type="checkbox"/> | |
| | | <input type="checkbox"/> | |
| | | <input type="checkbox"/> | |
| | | <input type="checkbox"/> | |
| | | <input type="checkbox"/> | |
| | | <input type="checkbox"/> | |

Record: 1/8 <OSC>

7. Click on the **Next Block** icon to view text.
8. Review document text listed and ensure that the following information is listed:
 - Purchase Order number
 - Vendor
 - Increase, Decrease or Cancel
 - Reason
 - Action
 - Total Line Change (if applicable)
9. Click on **Exit** icon.

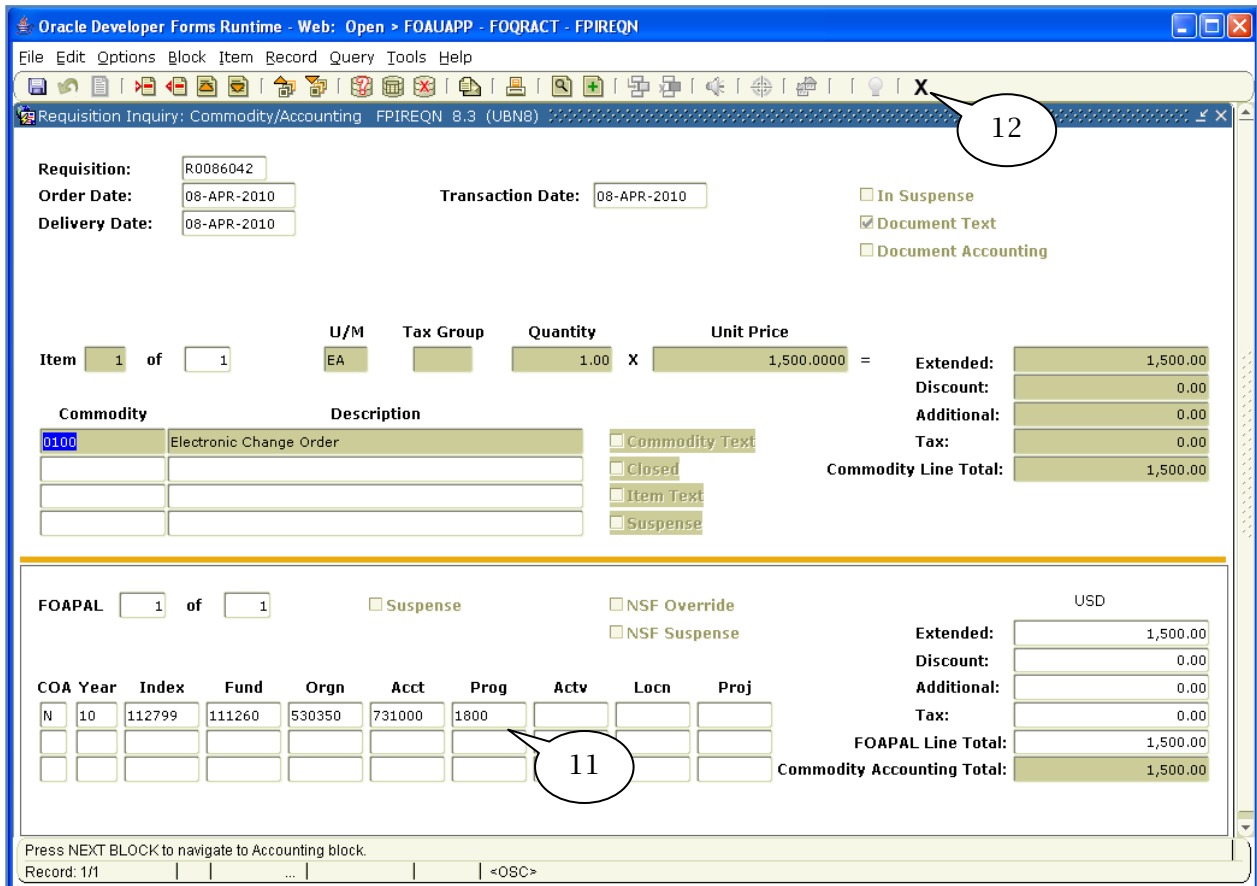
This will return you to the **Purchase Requisition Query [FPIREQN]** form.

The screenshot shows the Oracle Developer Forms Runtime window for the 'Purchase Requisition Query [FPIREQN]' form. The window title is 'Oracle Developer Forms Runtime - Web: Open > FOAUAPP - FOQRACT - FPIREQN'. The menu bar includes 'File', 'Edit', 'Options', 'Block', 'Item', 'Record', 'Query', 'Tools', and 'Help'. The toolbar contains various navigation and editing icons. A callout bubble with the number '10' points to the 'Next Block' icon in the toolbar. The form content includes the following fields and controls:

- Requisition:** R0086042
- Order Date:** 08-APR-2010
- Transaction Date:** 08-APR-2010
- Delivery Date:** 08-APR-2010
- Comments:** [Empty text field]
- Commodity Total:** 1,500.00
- Accounting Total:** 1,500.00
- In Suspense
- Document Text
- Complete
- Approved
- Print Date:** [Empty text field]
- Cancel Date:** [Empty text field]
- Closed Date:** [Empty text field]
- Activity Date:** 08-APR-2010
- User ID:** JGABEL
- Cancel Reason:** [Empty text field]
- Document Type:** PROCUREMENT
- Deferred Editing
- NSF Checking
- Requisition Copied From:** [Empty text field]
- Origin:** BANNER
- Reference Number:** [Empty text field]

At the bottom of the form, there is a status bar showing 'Record: 1/1' and '<OSC>'.

10. Click on **Next Block** until the Requisition Inquiry: Commodity/Accounting is displayed (this may take clicking on *Next Block* multiple times).



11. Verify **Index** and **Account** code.

- a. The index and account code must be the same as on the original Purchase Order.
- b. To **Increase** an original order the quantity will always be one regardless of the number of items being changed. The unit price will reflect the total amount of the changes applied to the entire purchase order.
- c. To **Decrease** or **Cancel** an original order the quantity will be listed as one. The dollar amount will determine if only one FOAPAL versus multiple FOAPALS have been used. For changes to only one FOAPAL, the amount will be \$1. When two FOAPALS are being used, the amount will be listed as \$2.00 and so on.

12. Click on **Exit** icon.

This will return you to the **Requisition Approval [FOQRACT]** form.

Oracle Developer Forms Runtime - Web: Open > FOAUAPP - FOQRACT

File Edit Options Block Item Record Query Tools Help

Requisition Approval FOQRACT 8.0 (UBN8)

Request: R0086042 JENNIFER L. GABEL Number of Items: 1

Line Item Information

Item: 1 Commodity: Electronic Change Order Net: 1,500.00

Vendor: 800321019 Rio Grande Contract Furnishings Inc

Accounting Information

| Sequence Number | COA | Fiscal Year | Index | Fund | Organization | Account | Program | Activity | Location |
|-----------------|-----|-------------|--------|--------|--------------|------------------|---------|----------|----------|
| 1 | N | 10 | 112799 | 111260 | 530350 | 731000 | 1800 | | |
| Project: | | | | | NSF: N | Amount: 1,500.00 | | | |
| | | | | | | | | | |
| Project: | | | | | NSF: | Amount: | | | |
| | | | | | | | | | |
| Project: | | | | | NSF: | Amount: | | | |

Check to override a non-sufficient Funds Condition.

Record: 1/1 | ... | <OSC>

13. Click on **Exit** icon.

This will return you to the **User Approval [FOAUAPP]** form.

Oracle Developer Forms Runtime - Web: Open > FOAUAPP

User Approval: FOAUAPP 8.3 (UBN8)

User ID: DOLAREY DEE OLAREY Document: Next Approver

| NSF | Document Type | Document Number | Change Sequence | Submission | Originating User | Document Amount | Queue Type | Next Approver |
|--|---------------|-----------------|-------------------------------------|-------------------------------------|------------------|-----------------|------------|---------------|
| <input type="checkbox"/> | REQ | R0086023 | <input type="checkbox"/> | <input type="checkbox"/> | DOLAREY | 1,000.00 | DOC | Y |
| Approve: <input type="checkbox"/> | | Disapprove: | | Detail: | Queue: | | | |
| <input type="checkbox"/> | REQ | R0086029 | <input type="checkbox"/> | <input type="checkbox"/> | DOLAREY | 867.68 | DOC | Y |
| Approve: <input type="checkbox"/> | | Disapprove: | | Detail: | Queue: | | | |
| <input type="checkbox"/> | REQ | R0086033 | <input type="checkbox"/> | <input type="checkbox"/> | JGABEL | 2.00 | DOC | Y |
| Approve: <input type="checkbox"/> | | Disapprove: | | Detail: | Queue: | | | |
| <input checked="" type="checkbox"/> | REQ | R0086042 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | JGABEL | 1,500.00 | DOC | Y |
| Approve: <input checked="" type="checkbox"/> | | Disapprove: | | Detail: | Queue: | | | |
| <input type="checkbox"/> | REQ | R0086043 | <input type="checkbox"/> | <input type="checkbox"/> | JGABEL | 1.00 | DOC | Y |
| Approve: <input type="checkbox"/> | | Disapprove: | | Detail: | Queue: | | | |
| <input type="checkbox"/> | | | <input type="checkbox"/> | <input type="checkbox"/> | | | | |
| Approve: <input type="checkbox"/> | | Disapprove: | | Detail: | Queue: | | | |

Record: 4/5

14. Upon returning to the User Approval [FOAUAPP] form you can proceed to **Approve** or **Disapprove** requisition.

Note: If disapproved the Requisitions will return to the Originator queue.

15. You can proceed to review additional requisitions on the approval form.

16. Click on **Exit** icon when completed.

Electronic Change Order Approval using Finance Self-Service

Change orders that include monetary changes (increases, decreases, or cancellations) are submitted using the purchase requisition process.

Approve/Disapprove Using Finance Self-Service

To access open an internet browser and go to **my.nmsu.edu**.

The my.nmsu.edu Secure Access logon screen will be displayed.

The screenshot shows the my.NMSU.edu Secure Access Login page. The page features a maroon header with the NMSU logo and the text 'my.NMSU.edu'. Below the header is a 'Secure Access Login' form with two input fields: 'User Name:' and 'Password:'. Below the 'Password:' field are two buttons: 'Login' and 'Cancel'. A link for 'Forgot Password?' is located below the buttons. To the right of the login form is a 'Welcome to MyNMSU' message. Below the message are two columns of links: 'Unifying NMSU Online' and 'NMSU Links'. At the bottom left is a copyright notice, and at the bottom right is the 'SUNGARD HIGHER EDUCATION' logo. Two callout boxes with numbers 1 and 2 are overlaid on the form. Callout 1 points to the 'User Name' field, and callout 2 points to the 'Password' field.

1. Enter your **User Name**.
2. Enter your **Password**.

my.NMSU.edu

Welcome Dee Anna O'Larey
You are currently logged in.

My Account | Content Layout

E-mail | Calendar | Groups | Logout | Help

Home | **Employee** | Workflow | Sample

April 8, 2010

NMSU Bookmarks

- Learn.nmsu.edu
- NMSU Phonebook
- Student Resources

Bookmarks

- JA-SIG Homepage
- SunGard Higher Education Homepage

E-mail Channel

Your email can be accessed by clicking on the E-mail icon on the top right of this page.

The email channel on the MyNMSU portal is contributing heavily to the portal instability. Since the portal is critical to many NMSU functions such as registration, we will temporarily disable the email preview channel that used to appear here.

Race and Ethnicity

Click here to take the Survey

Personal Announcements

There are no announcements

Campus Announcements

There are no announcements

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3. Click on the **Employee** tab.

my.NMSU.edu

Welcome Dee Anna O'Larey
You are currently logged in.

My Account | Content Layout

E-mail | Calendar | Groups | Logout | Help

Home | **Employee** | Workflow | Sample

April 8, 2010

Quick Links

- Time Sheet
- Leave Report
- Time Off

Banner Self-Service

- Banner Self-Service

Employee Information

Name : Name
NMSU ID Number : 8XXXXXXX

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4. Click on the **Banner Self-Service** folder to expand.

my.NMSU.edu

Welcome Dee Anna O'Larey
You are currently logged in.

My Account
Content Layout

E-mail Calendar Groups Logout Help

Home Employee Workflow Sample

April 8, 2010

Quick Links

- Time Sheet
- Leave Report
- Time Off

Banner Self-Service

- Banner Self-Service
 - Personal Information
 - Student
 - Employee
 - Finance

Employee Information

Name : Name
NMSU ID Number : 8XXXXXXXX

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5. Click on the **Finance** folder to expand.

my.NMSU.edu

Welcome Dee Anna O'Larey
You are currently logged in.

My Account
Content Layout

E-mail Calendar Groups Logout Help

Home Employee Workflow Sample

April 8, 2010

Quick Links

- Time Sheet
- Leave Report
- Time Off

Banner Self-Service

- Banner Self-Service
 - Personal Information
 - Student
 - Employee
 - Finance
 - Budget Queries
 - Encumbrance Query
 - Approve Documents
 - View Document

Employee Information

Name : Name
NMSU ID Number : 8XXXXXXXX

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6. Click on **Approve Documents**.

my.NMSU.edu

Back to Employee Tab

E-mail Calendar Groups Logout Help

Personal Information Student Employee Finance

Search [] Go MENU SITE MAP HELP

Approve Documents

Enter Approval Parameters

User ID: DOLAREY

Document Number: []

Documents for which you are the next approver
 All documents which you may approve

Submit Query

[Budget Queries | Encumbrance Query | Approve Documents | View Document]

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7. Select radio button **All documents which you may approve**.

A list of all requisition awaiting your approval will be displayed, you will need to select the document number (Purchase Requisition) and view to determine if the requisition submitted is an Electronic Change Order.

Approve Documents

Select the Document Number link to display the details of a document. Select the History link to display the approval history of the document. Select the Approve link, if enabled, to approve the document. Select the Disapprove link, if enabled, to disapprove the document.

Queried Parameters

User ID: [] Name: [] Name: []

Document Number: []

Documents Shown: All

Approve Documents List

| Next Approver | Type | NSF Change | Seq# | Sub# | Originating User | Amount | Queue | Type | Document | History | Approve | Disapprove |
|---------------|------|------------|------|------|------------------|----------|-------|------|----------|---------|---------|------------|
| Y | REQ | | | | DNAME1 | 1,000.00 | DOC | | R0086023 | History | Approve | Disapprove |
| Y | REQ | | | | DNAME1 | 867.68 | DOC | | R0086029 | History | Approve | Disapprove |
| Y | REQ | | | | DNAME1 | 2.00 | DOC | | R0086033 | History | Approve | Disapprove |
| Y | REQ | | | | DNAME1 | 1,500.00 | DOC | | R0086042 | History | Approve | Disapprove |
| Y | REQ | | | | DNAME1 | 1.00 | DOC | | R0086043 | History | Approve | Disapprove |
| | REQ | | | | DNAME1 | 1,000.00 | DOC | | R0086023 | History | Approve | Disapprove |
| | REQ | | | | DNAME1 | 867.68 | DOC | | R0086029 | History | Approve | Disapprove |
| | REQ | | | | DNAME1 | 2.00 | DOC | | R0086033 | History | Approve | Disapprove |
| | REQ | | | | DNAME1 | 1,500.00 | DOC | | R0086042 | History | Approve | Disapprove |
| | REQ | | | | DNAME1 | 1.00 | DOC | | R0086043 | History | Approve | Disapprove |

Another Query []

[Budget Queries | Encumbrance Query | Approve Documents | View Document]

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8. Click on desired **Document** "Requisition" number.

| | | | | | | | | | | | | | |
|--|---|------------|--------------|-------------------|-------------------|-------------|-------------|-------------|-------------|----------------|---------------|-------------|---------------|
| Ship to: | Ofc-Central Receiving MSC 3545 1600 Wells Street PO Box 30001 (575) 646-7709 Las Cruces, NM 88003-8001 United States of America | | | | | | | | | | | | |
| Attention: | Ofc-Central Receiving - Amanda S. | | | | | | | | | | | | |
| Contact: | Ofc-Central Receiving - Amanda S. | | | | | | | | | | | | |
| Phone Number: | 575-646-7709 | | | | | | | | | | | | |
| Vendor: | 800321019 Rio Grande Contract Furnishings Inc 337 N Alameda Ste 2 Las Cruces, NM 88005 | | | | | | | | | | | | |
| Phone Number: | 575-524-3355 | | | | | | | | | | | | |
| Fax Number: | 575-527-8680 | | | | | | | | | | | | |
| Document Text: | change order PO number P0080001 Vendor: Rio Grande Contract Furnishings; 800321019 Increase Reason: quantity input incorrectly Action: increase quantity of line item 1 from 1 to 100 for a total line change of \$1500.00 | | | | | | | | | | | | |
| Requisition Commodities | | | | | | | | | | | | | |
| Item | Commodity Description | U/M | Qty | Unit Price | Ext Amount | Disc | Addl | Tax | Cost | | | | |
| 1 | 0100 Electronic Change Order EA | | 1 | 1500 | 1,500.00 | | | | | | | | |
| | | | | | | 0.00 | 0.00 | 0.00 | 1,500.00 | | | | |
| Requisition Accounting | | | | | | | | | | | | | |
| Seq# | COA | FY | Index | Fund | Orgn | Acc | Actv | Locn | Proj | NSFSusp | NSFOvr | Susp | Amount |
| 1 | N | 10 | 112799 | 111260 | 530350 | 731000 | 1800 | | | N | N | N | 1,500.00 |
| Total of displayed sequences: | | | | | | | | | | | | 1,500.00 | |
| <input checked="" type="checkbox"/> No Related Documents Available | | | | | | | | | | | | | |

[Budget Queries | Encumbrance Query | Approve Documents | View Document]

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9. Review the Document Text as this will state the reason and specific details about the Change Order.
10. Review and ensure that Document text has the following information listed;
 - a. PO
 - b. Vendor
 - c. Increase, Decrease or Cancel
 - d. Reason
 - e. Action
 - f. Total Line Change (if applicable)
12. The Commodity description will display “**Electronic Change Order**”, this is what will determine that a Purchase Requisition being process is a Change Order.
13. Verify **Index** and **Account** code number.
 - a. The index and account code must be the same as on the original Purchase Order.
 - b. To **Increase** an original order the quantity will always be one regardless of the number of items being changed. The unit price will reflect the total amount of the changes applied to the entire purchase order.
 - c. To **Decrease** or **Cancel** an original order the quantity will be listed as one. The dollar amount will determine if only one FOAPAL versus multiple FOAPALS have been used. For changes to only one FOAPAL, the amount will be \$1. When two FOAPALS are being used, the amount will be listed as \$2.00 and so on.
14. Once requisition is reviewed, return to the previous page by using the Back arrow icon on the internet browser.

Approve Documents

Select the Document Number link to display the details of a document. Select the History link to display the approval history of the document. Select the Approve link, if enabled, to approve the document. Select the Disapprove link, if enabled, to disapprove the document.

Queried Parameters

| | | |
|------------------|------|------|
| User ID | Name | Name |
| Document Number: | | |
| Documents Shown: | All | |

Approve Documents List

| Next Approver | Type | NSF Change | Seq# | Sub# | Originating User | Amount | Queue | Type | Document | History | Approve | Disapprove |
|---------------|------|------------|------|------|------------------|----------|-------|----------|-------------------------|-------------------------|----------------------------|------------|
| Y | REQ | | | | DNAME1 | 1,000.00 | DOC | R0086023 | History | Approve | Disapprove | |
| Y | REQ | | | | DNAME1 | 867.68 | DOC | R0086029 | History | Approve | Disapprove | |
| Y | REQ | | | | DNAME1 | 2.00 | DOC | R0086033 | History | Approve | Disapprove | |
| Y | REQ | | | | DNAME1 | 1,500.00 | DOC | R0086042 | History | Approve | Disapprove | |
| Y | REQ | | | | DNAME1 | 1.00 | DOC | R0086043 | History | Approve | Disapprove | |
| | REQ | | | | DNAME1 | 1,000.00 | DOC | R0086023 | History | Approve | Disapprove | |
| | REQ | | | | DNAME1 | 867.68 | DOC | R0086029 | History | Approve | Disapprove | |
| | REQ | | | | DNAME1 | 2.00 | DOC | R0086033 | History | Approve | Disapprove | |
| | REQ | | | | DNAME1 | 1,500.00 | DOC | R0086042 | History | Approve | Disapprove | |
| | REQ | | | | DNAME1 | 1.00 | DOC | R0086043 | History | Approve | Disapprove | |

RELEASE: 8.2

[[Budget Queries](#) | [Encumbrance Query](#) | [Approve Documents](#) | [View Document](#)]

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15. Select to **Approve** or **Disapprove**.

16. When finished reviewing your approval list, logout properly from my.nmsu.edu.