

OVERVIEW

Brief overview of module processes.

High Level Description	
Process	Change Order Request
Module	OnBase Unity Form
Document Type	Business Process Guide
File Reference	Finance Support Share:\Finance Support\OnBase\BPG_OB_Change_Order_Request

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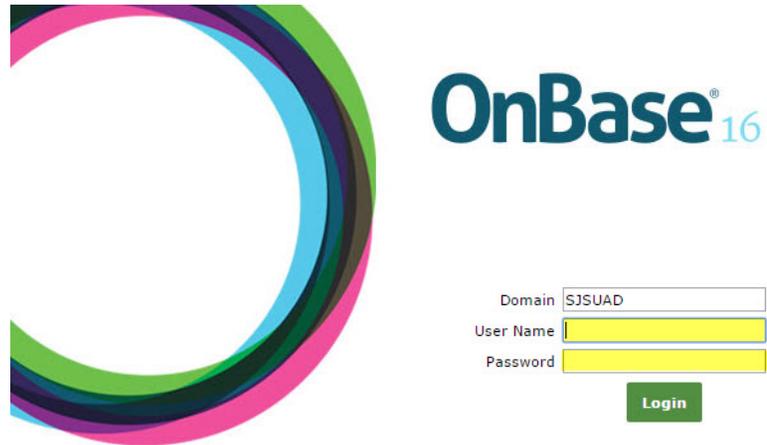
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Submitting a Change Order Request

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.



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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).

PUR Change Order Request

Main

Department Information

CO Requestor Name: CO Requestor Email: CO Request Date: CO Approval Status:

CO Approver Name: CO Approver Email: CO Approval Date: Revision Number:

Purchase Order Information

Purchase Order ID: Supplier Name: Supplier ID: Buyer Name:

Dept Approver: Dept Approver Email: Department ID:

Action Requested

Request Summary and Additional Details:

Add a Line Add

Quantity *	UOM *	Unit Price *	Ext Amt *	Description *	Account *	Fund *	DeptID *	Program	Class	Project
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Change Existing Line(s) Add

Change Type *	Line # *	Qty From *	Qty To *	Unit Price From *	Unit Price To *	Desc From *	Desc To *	Reduce By *
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Cancel the entire PO (PO must have no activity. Buyers cannot cancel any part of order that has been received, invoiced and/or paid.)

Change Order Backup Document(s)

PUR Change Order Backup Doc:

Submit

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 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

The screenshot displays the 'PUR Change Order Request' form. It is divided into several sections:

- Department Information:** Contains fields for CO Requester Name (Ray Requester), CO Requester Email (Ray.Requester@sjsu.edu), CO Request Date (04/20/2017 10:45:22 AM), CO Approval Status, CO Approver Name, CO Approver Email, CO Approval Date, and Revision Number.
- Purchase Order Information:** Contains fields for Purchase Order ID, Supplier Name, Supplier ID, Buyer Name, Dept Approver (a dropdown menu), Dept Approver Email, and Department ID.
- Action Requested:** A large text area for 'Request Summary and Additional Details'.
- Add a Line:** A table header with columns: Quantity, UOM, Unit Price, Ext Amt, Description, Account, Fund, DeptID, Program, Class, and Project. An 'Add' button is on the right.
- Change Existing Line(s):** A table header with columns: Change Type, Line #, Qty From, Qty To, Unit Price From, Unit Price To, Desc From, Desc To, and Reduce By. A checkbox below reads 'Cancel the entire PO (PO must have no activity. Buyers cannot cancel any part of order that has been received, invoiced and/or paid.)'. An 'Add' button is on the right.
- Change Order Backup Document(s):** A section for uploading documents, with a button labeled 'Attach PUR Change Order Backup Doc'.
- Submit:** A button at the bottom left of the form.

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

The screenshot shows a form titled "Purchase Order Information" with a dark blue header. Below the header, there are seven input fields arranged in two rows. The first row contains "Purchase Order ID*", "Supplier Name", "Supplier ID", and "Buyer Name". The second row contains "Dept Approver*" (a dropdown menu), "Dept Approver Email", and "Department ID".

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.

The screenshot shows the 'Action Requested' form. At the top is a purple header with the text 'Action Requested'. Below it is a yellow bar with the text 'Request Summary and Additional Details *' and a large white text area. Underneath is a dark blue bar with the text 'Add a Line' and an 'Add' button on the right. Below that is a table header with columns: Quantity, UOM, Unit Price, Ext Amt, Description, Account, Fund, DeptID, Program, Class, Project. Below the table header is another dark blue bar with the text 'Change Existing Line(s)' and an 'Add' button on the right. Below that is a checkbox with the text 'Cancel the entire PO (PO must have no activity. Buyers cannot cancel any part of order that has been received, invoiced and/or paid.)'. Below that is a dark blue bar with the text 'Change Order Backup Document(s)' and a button 'Attach PUR Change Order Backup Doc'. At the bottom is a dark blue bar with the text 'Submit'.

The screenshot shows the 'Action Requested' form with the 'Add a Line' section expanded. The 'Request Summary and Additional Details *' field is at the top. Below it is the 'Add a Line' section with an 'Add' button on the right. The section contains input fields for: Quantity, UOM (with a dropdown menu), Unit Price, Ext Amt, Description, Account, Fund, DeptID, Program, Class, and Project. A 'Remove' button is located at the bottom right of the input fields.

Change Existing Line(s)

When line changes to an existing purchase order are needed, users you 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)

The screenshot shows the 'Change Existing Line(s)' form with the 'Change Type' dropdown set to 'LINE DESCRIPTION'. The form includes fields for 'Line #', 'Qty From', 'Qty To', 'Unit Price From', 'Unit Price To', 'Desc From', 'Desc To', and 'Reduce By'. The 'LINE DESCRIPTION' dropdown is highlighted. A 'Remove' button is visible on the right. A checkbox at the bottom reads: 'Cancel the entire PO (PO must have no activity. Buyers cannot cancel any part of order that has been received, invoiced and/or paid.)'.

The screenshot shows the 'Change Existing Line(s)' form with the 'Change Type' dropdown set to 'UNIT PRICE'. The form includes fields for 'Line #', 'Qty From', 'Qty To', 'Unit Price From', 'Unit Price To', 'Desc From', 'Desc To', and 'Reduce By'. The 'UNIT PRICE' dropdown is highlighted. A 'Remove' button is visible on the right. A checkbox at the bottom reads: 'Cancel the entire PO (PO must have no activity. Buyers cannot cancel any part of order that has been received, invoiced and/or paid.)'.

The screenshot shows the 'Change Existing Line(s)' form with the 'Change Type' dropdown set to 'QUANTITY'. The form includes fields for 'Line #', 'Qty From', 'Qty To', 'Unit Price From', 'Unit Price To', 'Desc From', 'Desc To', and 'Reduce By'. The 'QUANTITY' dropdown is highlighted. A 'Remove' button is visible on the right. A checkbox at the bottom reads: 'Cancel the entire PO (PO must have no activity. Buyers cannot cancel any part of order that has been received, invoiced and/or paid.)'.

amount)

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)

The screenshot shows the 'Change Existing Line(s)' form. The 'Change Type' dropdown is set to 'CANCEL LINE'. The 'Line #' field is empty. The 'Remove' button is visible. A warning message states: 'When the 'CANCEL LINE' change type is selected, Line(s) must have no activity. Buyers cannot cancel any part of a line that has been received, invoiced, or paid.' There is also a checkbox for 'Cancel the entire PO (PO must have no activity. Buyers cannot cancel any part of order that has been received, invoiced and/or paid.)'.

The screenshot shows the 'Change Existing Line(s)' form. The 'Change Type' dropdown is set to 'CLOSE LINE'. The 'Line #' field is empty. The 'Reduce By' field is empty. The 'Remove' button is visible. A warning message states: 'When the 'CLOSE LINE' change type is selected, partial order has been received and paid, and no further activity is anticipated. Reduce line accordingly and disencumber remaining balance.' There is also a checkbox for 'Cancel the entire PO (PO must have no activity. Buyers cannot cancel any part of order that has been received, invoiced and/or paid.)'.

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.

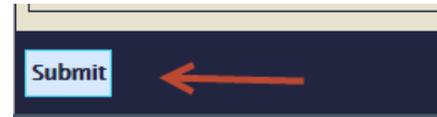
The screenshot shows the 'Change Order Backup Document(s)' form. The title is 'PUR Change Order Backup Doc'. Below the title is a button labeled 'Attach PUR Change Order Backup Doc'. A red arrow points to this button.

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.



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Change Order Submitted

[Edit](#)

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.

[MySJSU](#)
[Canvas](#)
[Athletics](#)
[Give to SJSU](#)

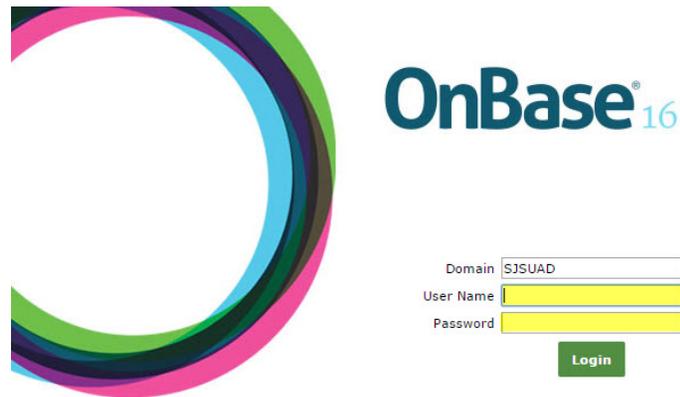
Navigate

[BACK to Change Order](#)
[Change Order FAQs](#)
[Change Order Submitted](#)

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.



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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.

The screenshot displays the OnBase interface. At the top, there is an 'Inbox' section with a table of change order requests. Below the table, there is a message: 'Change Orders requiring your approval. Select a change order.' and a prompt: 'Approve or Deny the Change Order request here.' At the bottom, there are two buttons: 'PUR: Approve CO' and 'PUR: Deny CO'. A red circle highlights these buttons, and a red arrow points to the 'View details of the change order request by scrolling here' text. Below this, the 'PUR Change Order Request' form is shown, which includes fields for Package Status, CO Request #, Department Information, and Purchase Order Information.

Entry Date	Purchase Order ID	CO Requestor Name	Dept Approver Name	Dept Approver ID
4/19/2017 11:39:34 AM	3000022147	RAY REQUESTER	ANN APPROVER	005874856
3/22/2017 2:06:44 PM	3000021239	RAY REQUESTER	ANN APPROVER	005874856
3/22/2017 12:24:27 PM	3000021223	RAY REQUESTER	ANN APPROVER	005874856

Change Orders requiring your approval. Select a change order.

Approve or Deny the Change Order request here.

PUR: Approve CO PUR: Deny CO

View details of the change order request by scrolling here

PUR Change Order Request

Main Approval Logs

Package Status: Signature Required
 Email CO to Requestor

CO Request #:

Department Information

CO Requestor Name RAY REQUESTER	CO Requestor Email ray.requester@sjsu.edu	CO Request Date 04/19/2017 11:29:25 AM	CO Approval Status <input type="text"/>
CO Approver Name <input type="text"/>	CO Approver Email <input type="text"/>	CO Approval Date <input type="text"/>	Revision Number <input type="text"/>

Purchase Order Information

0 Note(s)

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.

Message to Approver: Change Order for Review and Approval

Sent to selected department approver after requester submits change order form.

Change Order Request for PO # 3000020354 Has Been Submitted for Approval

noreply@sjsu.edu Feb 23
to me

Ray Requester,

The change order request for PO # 3000020354 was sent to Ann Approver for approval on 2/23/2017 8:36:10 AM. You will receive notification once it's approved.

Thank you,
Contracts & Purchasing Services

Change Order Request for PO # 3000020354 Submitted for Your Approval

noreply@sjsu.edu Feb 23
to me

Ann Approver,

Ray Requester has submitted a change order request for PO # 3000020354 requiring your approval. Please click on the following [OnBase Link](#) to review and approve the change order request. This request cannot be processed until we've received your approval.

Thank you,
Contracts & Purchasing Services

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.

Change Order Request for PO # 3000020354 is Approved

OnBase/OnBase Testing x



noreply@sjsu.edu
to me

Feb 23 ☆



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

OnBase/OnBase Testing x



noreply@sjsu.edu
to me

Feb 2 ☆



Ray Requester,

Your change order request for PO # 3000021034 was denied by Ann Approver on 2/2/2017 4:11:26 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 ready for approval   OnBase/OnBase Testing x

 noreply@sjsu.edu
to me, 

Feb 8   

Ann Approver,

A change order request was submitted by Ray Requester for your approval on 2/2/2017 3:30:26 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