



Advanced Change Requests

FOR REQUESTER/DPS roles only

This guide should be used as a supplement to:
[“Creating and Processing a PO Change Request”](#)



What this Guide Will Cover

- Reminder: The five basic rules of change requests **(see slide 2)**
- Changing Funding Sources on a Vouchered Purchase Order **(see slide 3)**
 - Standard (quantity based) POs **(see slide 4)**
 - Blanket (amount based) POs **(see slide 16)**
- Zero dollar lines (subaward example) **(see slide 25)**
- Change Requests to form-based Purchase Orders **(see slide 33)**
 - NPOPs **(see slide 34)**
 - Subawards **(see slide 35)**
 - Legacy Waiver of Bid Requests **(see slide 40)**
- Handling Closed Purchase Orders **(see slide 50)**
 - Standard (quantity based) POs **(see slide 51)**
 - Blanket (amount based) POs **(see slide 57)**
- Summary Notes **(see slide 63)**



The five basic rules of change requests are as follows:

1. You can only create a change request on an open, completed purchase order.
2. Only one change request can be in process for any PO at a time.
3. Change requests go through the same workflow as requisitions. If dollar amounts have been adjusted, the approval workflow will be adjusted for cumulative total dollar amount.
4. You cannot change a line that's been fully invoiced and vouchered.
5. Always check for the account code since UDX will let you submit a change request without one.

Note: Change Requests should NOT be initiated for the following: Closing or Canceling entire POs, making changes to Catalog Orders.



Changing Funding Sources on an Invoiced PO

- Rule #4 of Change Requests means you cannot change a line that's been fully invoiced and vouchered.
- Because of this rule, a fully invoiced line will not be visible on a Change Request, but it's still on the purchase order! This means caution is needed when changing funding sources in the header of a purchase order, or on any line that has invoices against it.
- Standard (quantity-based) and Blanket (amount-based) purchase orders have different approaches to funding changes.



Changing Funding on an Invoiced PO:

Standard (quantity based) POs

- Standard (quantity based) POs need to separate the quantities that have already been paid for (whether you can see them on your change request or not) from those not yet paid for.
- The following slides show two different scenarios:
 1. Changing the funding on open lines when at least one other line has been fully invoiced.
 2. Changing the funding on open quantities when some quantities on that line have been fully invoiced.



Records found: 1, Totaling: 1.29 USD

Voucher No. ↓	Supplier Voucher No.	Voucher Date	Due Date	Voucher Type	Payment Status	Voucher Total	Invoiced By
IT000950	test1234	5/1/2022	5/1/2022	Voucher	Payable	1.29 USD	Pickering, Kristen

Line Details

Line No.	Product Name	Catalog No.	Unit Price	Qty/UOM	Extended Price	Voucher Qty/Cost	Status
1	Easy Peel Laser Address Labels, 1...	AVE5160	35.23 USD	1 BX	35.23 USD	1 / 35.23 USD	Open
2	Small Binder Clips, 3/8"...	UNV10200	1.29 USD	1 DZ	1.29 USD	1 / 1.29 USD	Net Invoiced
3	File Folders, 1/3 Cut Assorted, On...	UNV12113	20.80 USD	1 BX	20.80 USD	1 / 20.80 USD	Open

Completed

Details

Supplier Status

Sent To Supplier

Supplier

W B MASON CO INC

Total (57.32 USD)

Subtotal

57.32

57.32

Related Documents

Requisition: 3465576

Voucher: IT000950

Scenario 1:

This is a standard (quantity based) purchase order that has been invoiced against line 2. You need to change the funding source for the open lines.





Change Requests • 3522984

Summary PO Preview External C

Changes will not be sent to the Supplier

Change Request Reason

Reason Change funding on open lines

Accounting Codes

Work Order Number	SpeedType	Purpose	Fund	Dept	Program	Source	Project ID	User Ref	Cost Share Project
N/A	PURC110000	PURC110000	OPBAS	04750	ADALL	no value	no value	no value	no value
N/A	PROCUREMENT SERVICES	R/E PROCUREMENT SERVICES	OPERATING BASIC	PROCUREMENT SERVICES	ADMINISTRATIVE ALLOWABLE				

2 Items

W B MASON CO INC 2 Items 56.03 USD

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 Easy Peel Laser Address Labels, 1 x 2 5/8, White, 3000/Box	B3				
2 File Folders, 1/3 Cut Assorted, One-Ply Top Tab, Letter, Manila, 100/Box	UNV12113				

On the change request, it is tempting to just change the value of the funding source in the **Accounting Codes** header, but that would change it for ALL lines on the PO, including the line that's already been invoiced.

REMEMBER!

You may only change the 2 lines that are visible on the change request, but there are still 3 lines on the purchase order!

... Assign Draft Submit Request

Draft

Total (56.03 USD)	
Subtotal	56.03
	56.03

Related Documents

[Purchase Order: UDST001120](#)
[Requisition: 3465576](#)

What's next for my order?



Change Requests • 3522984

Summary PO Preview External Communication Comments Attachments History

1 Changes will not be sent to the Supplier.

Change Request Reason

ReasonChange funding on open lines

Accounting Codes

Work Order Number	SpeedType	Purpose	Fund	Dept	Program	Source	Project ID	User Ref	Cost Share Project
N/A									
N/A									

Instead of the header, change the funding on the open, un-invoiced line:
Click the ellipsis then select **Override Accounting Codes**.

2 Items

W B MASON CO INC • 2 Items • 56.03 USD

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1 Easy Peel Laser Address Labels, 1 x 2 5/8, White, 3000/Box	AVE5160	BX	35.23	1 BX	35.23	...
2 File Folders, 1/3 Cut Assorted, One-Ply Top Tab, Letter, Manila, 100/Box	UNV12113	BX	20.80	1 BX	20.80	...

- Override
- Delivery Options
- Accounting Codes

Draft

Total (56.03 USD)

Subtotal56.03

56.03

Related Documents

Purchase Order: UDST001120

Requisition: 3465576

What's next for my order?

Copy To Other Lines: Accounting Codes

W B MASON CO INC

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
2 File Folders, 1/3 Cut Assorted, One-Ply Top Tab, Letter, Manila, 100/Box	UNV12113	BX	20.80	1 BX	20.80	<input type="checkbox"/>

Copy

Close

Once you have entered the new funding source, you can click the **document icon** to copy it to other lines. In the **Copy To Other Lines** window, **check the boxes** for the lines you want to override. Click **Copy**.

1	Easy Peel Laser Address Labels, 1 x 2 5/8, White, 3000/Box	AVE5160	BX	35.23	1 BX	35.23	...	<input type="checkbox"/>
---	--	---------	----	-------	------	-------	-----	--------------------------

ACCOUNTING CODES

Values have been overridden for this line

Work Order Number	SpeedType	Purpose	Fund	Dept	Program	Source	Project ID	User Ref	Cost Share Project
N/A	PURC412111	PURC412111	OPBAL	04750	ADNON	no value	no value	no value	no value
N/A	DF-PROCUREMENT SVCS GIFTS	DF-PROCUREMENT SVCS GIFTS	OPERATING BALANCE	PROCUREMENT SERVICES	ADMINISTRATIVE NON ALLOWABLE				

2	File Folders, 1/3 Cut Assorted, One-Ply Top Tab, Letter, Manila, 100/Box	UNV12113	BX	20.80	1 BX	20.80	...	<input type="checkbox"/>
---	--	----------	----	-------	------	-------	-----	--------------------------



Change Requests • 3522984

Summary PO Preview External Communication Comments Attachments History

Accounting Codes

Values vary by line: [Copy to other lines](#)

Work Order Number	SpeedType	Purpose	Fund	Dept	Program	Source	Project ID	User Ref	Cost Share Project
-------------------	-----------	---------	------	------	---------	--------	------------	----------	--------------------

N/A
N/A

The original fund source is still in the header, but each line has been overridden.

PRO TIP!
Click the eyeball to View
Accounting Codes Only.

2 Items

W B MASON CO INC - 2 Items - 56.03 USD

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 Easy Peel Laser Address Labels, 1 x 2 5/8, White, 3000/Box	AVE5160	BX	35.23	1 BX	35.23

Values have been overridden for this line

Work Order Number	SpeedType	Purpose	Fund	Dept	Program	Source	Project ID	User Ref	Cost Share Project
-------------------	-----------	---------	------	------	---------	--------	------------	----------	--------------------

N/A	PURC412111	PURC412111	OPBAL	04750	ADNON	no value	no value	no value	no value
N/A	DF-PROCUREMENT SVCS GIFTS	DF-PROCUREMENT SVCS GIFTS	OPERATING BALANCE	PROCUREMENT SERVICES	ADMINISTRATIVE NON ALLOWABLE				

2 File Folders, 1/3 Cut Assorted, One-Ply Top Tab, Letter, Manila, 100/Box	UNV12113	BX	20.80	1 BX	20.80
--	----------	----	-------	------	-------

Values have been overridden for this line

Work Order Number	SpeedType	Purpose	Fund	Dept	Program	Source	Project ID	User Ref	Cost Share Project
-------------------	-----------	---------	------	------	---------	--------	------------	----------	--------------------

N/A	PURC412111	PURC412111	OPBAL	04750	ADNON	no value	no value	no value	no value
N/A	DF-PROCUREMENT SVCS GIFTS	DF-PROCUREMENT SVCS GIFTS	OPERATING BALANCE	PROCUREMENT SERVICES	ADMINISTRATIVE NON ALLOWABLE				

Draft

Total (56.03 USD)

56.03

56.03

Related Documents

[Purchase Order: UDST001120](#)

[Requisition: 3465576](#)

What's next for my order?



PRO TIP! Click the “hamburger” to minimize the sidebar and see more on your screen.

The PO shows changes to lines 1 and 3 only, and successful sync with PeopleSoft.



Purchase Order • UDST001130 Revision 0

Status Summary Revisions 1 Confirmations Shipments Change Requests Receipts **Vouchers 1** Comments Attachments History

Records found: 1, Totaling: 12.55 USD

Voucher No. ↓	Supplier Voucher No.	Voucher Date	Due Date	Voucher Type	Payment Status	Voucher Total	Invoiced By
IT000951	test1234	5/1/2022	5/31/2022	Voucher	In Process	12.55 USD	Pickering, Kristen

Line Details

Line No.	Product Name	Catalog No.	Unit Price	Qty/UOM	Extended Price	Voucher Qty/Cost	Status
1	Premium 2-cu ft Black Hardwood...	148349	2.98 USD	10 EA	29.80 USD	7 / 20.86 USD 3 / 8.94 USD	Open Net Invoiced
2	8-Pack Multicolor...	1527848	3.61 USD	3 EA	10.83 USD	2 / 7.22 USD 1 / 3.61 USD	Open Net Invoiced

Completed

Details

Supplier Status

Sent To Supplier

Supplier

LOWE'S HOME CENTERS INC

Total (40.63 USD)

Subtotal

40.63

40.63

Related Documents

Requisition: 3522992

Scenario 2:

This is a standard (Quantity-Based) purchase order that has been *partially* invoiced against *both* lines. You need to change the funding source for the open *quantities*.



Change Requests • 3522951

Summary PO Preview External Communication Comments Attachments History

Changes will not be sent to the Supplier.

Change Request Reason

Reason change funding source on open quantities

Accounting Codes

Work Order Number	SpeedType	Purpose	Fund	Dept	Program	Source	Project ID	User Ref	Cost Share Project
N/A	PURC110000	PURC110000	OPBAS						
N/A	PROCUREMENT SERVICES	PROCUREMENT SERVICES	OPERATING						

13 Items

LOWE'S HOME CENTERS INC - 13 Items - 40.63 USD

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1 Premium 2-cu ft Black Hardwood Mulch	148349	EA	2.98	10 EA	29.80	...
2 8-Pack Multicolor Marigold in Tray (L17086)	1527848	EA	3.61	3 EA	10.83	...

It is tempting to just change the value of the funding source in the **Accounting Codes** header, but that would change it for **ALL** items, including those that have already been invoiced.

Note that the change request is displaying the **ORIGINAL** quantity ordered, *not* the balance of the quantity ordered less the quantity invoiced!

Draft

Total (40.63 USD) 40.63

Subtotal 40.63

Related Documents

Purchase Order: UDST001130

Requisition: 3522992

What's next for my order?

Summary PO Preview External Communication Comments Attachments History

Values vary by line. [Copy to other lines](#)

Work Order Number	SpeedType	Purpose	Fund	Dept	Program	Source	Project ID	User Ref	Cost Share Project
Click the ellipsis then select Override Accounting Codes . You will need to split the funding by quantity between what has been invoiced and what is open and adjust the quantities on the line to reflect the split.									
Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price				
1 Premium 2-cu ft Black Hardwood Mulch	148349	EA	2.98	10 EA	29.80				
ACCOUNTING CODES									
Work Order Number	SpeedType	Purpose	Fund	Dept	Program	Source	Project ID	User Ref	Cost Share Project
N/A	PURC110000	PURC110000	OPBAS	04750	ADALL	no value	no value	no value	no value
N/A	PROCUREMENT SERVICES	PROCUREMENT SERVICES	OPERATING BASIC	PROCUREMENT SERVICES	ADMINISTRATIVE ALLOWABLE				3
N/A	PURC412111	PURC412111	OPBAL	04750	ADNON	no value	no value	no value	no value
N/A	DF-PROCUREMENT SVCS GIFTS	DF-PROCUREMENT SVCS GIFTS	OPERATING BALANCE	PROCUREMENT SERVICES	ADMINISTRATIVE NON ALLOWABLE				7
2 8-Pack Multicolor Marigold in Tray (L17086)	1527848	EA	3.61	3 EA	10.83				

Draft

Total (40.63 USD)

Subtotal 40.63

40.63

Related Documents

Purchase Order: UDST001130

Requisition: 3522992

What's next for my order?

- Override
- Delivery Options
- Accounting Codes

The 3 *invoiced* items are under the *old* funding code. The 7 *open* items are under the *new* code.

Change Requests • 3522951

Summary External Communication Comments Attachments History

① Values vary by line.

Work Order Number	SpeedType	Purpose	Fund	Dept	Program	Source	Project ID	User Ref	Cost Share Project
N/A	PURC110000	PURC110000	OPBAS	04750	ADALL	no value	no value	no value	no value
N/A	PROCUREMENT SERVICES	PROCUREMENT SERVICES	OPERATING BASIC	PROCUREMENT SERVICES	ADMINISTRATIVE ALLOWABLE				

The original fund source is still in the header (and should never be changed), but each line is overridden and split by quantity.

1	✓	Premium 2-cu ft Black Hardwood Mulch		148349	EA		2.98	10EA	29.80	
ACCOUNTING CODES										Values have been overridden for this line
Work Order Number	SpeedType	Purpose	Fund	Dept	Program	Source	Project ID	User Ref	Cost Share Project	Amount of Qty
N/A	PURC110000	PURC110000	OPBAS	04750	ADALL	no value	no value	no value	no value	3
N/A	PROCUREMENT SERVICES	PROCUREMENT SERVICES	OPERATING BASIC	PROCUREMENT SERVICES	ADMINISTRATIVE ALLOWABLE					
N/A	PURC412111	PURC412111	OPBAL	04750	ADNON	no value	no value	no value	no value	7
N/A	DF-PROCUREMENT SVCS GIFTS	DF-PROCUREMENT SVCS GIFTS	OPERATING BALANCE	PROCUREMENT SERVICES	ADMINISTRATIVE NON ALLOWABLE					

2	✓	8-Pack Multicolor Marigold in Tray (L17086)		1527848	EA		3.61	3EA	10.83	
ACCOUNTING CODES										Values have been overridden for this line
Work Order Number	SpeedType	Purpose	Fund	Dept	Program	Source	Project ID	User Ref	Cost Share Project	Amount of Qty
N/A	PURC110000	PURC110000	OPBAS	04750	ADALL	no value	no value	no value	no value	1
N/A	PROCUREMENT SERVICES	PROCUREMENT SERVICES	OPERATING BASIC	PROCUREMENT SERVICES	ADMINISTRATIVE ALLOWABLE					
N/A	PURC412111	PURC412111	OPBAL	04750	ADNON	no value	no value	no value	no value	2
N/A	DF-PROCUREMENT SVCS GIFTS	DF-PROCUREMENT SVCS GIFTS	OPERATING BALANCE	PROCUREMENT SERVICES	ADMINISTRATIVE NON ALLOWABLE					

Completed

Total (40.63 USD)

Subtotal

40.63

40.63

Related Documents

Purchase Order: UDST001130

Requisition: 3522992

What's next?



Purchase Order • UDST001130 Revision 1

- Status
- Summary
- Revision 2
- Confirmations
- Shipments
- Change Requests 1
- Receipts
- Vouchers 1
- Comments
- Attachments
- History

Start date

mm/dd/yyyy

End date

mm/dd/yyyy

Action

Purchase Order

Document type

Filter

Clear All Filters

Export CSV

Filters

<

>

Page 1 of 4

1-20 of 71 Results

20 Per Page

Line No	Revision No.	Date/Time ↓	User	Step(s)	Action	Field Name	From	To	Note
	1	5/10/2022 5:48:50 PM	System	1	PO Export sent to external system				The PO was successfully distributed to the ERP system.
	1	5/10/2022 5:48:36 PM	System		PO Approvals completed				
	1	5/10/2022 5:48:06 PM	System		PO Revision Finalized				
	original	5/10/2022 5:48:05 PM	System		PO placed in workflow after the change request was merged				
Line 2	1	5/10/2022 5:48:05 PM	System		Change Request merged	Project End Date Flag 2	empty	:1, 2	
Line 2	1	5/10/2022 5:48:05 PM	System		Change Request merged	Project End Date Flag 2:Split method	% of Price	Amount of Qty	
Line 2	1	5/10/2022 5:48:05 PM	System		Change Request merged	Project Type 2	empty	:1, 2	
Line 2	1	5/10/2022 5:48:05 PM	System		Change Request merged	Project Type 2:Split method	% of Price	Amount of Qty	
Line 2	1	5/10/2022 5:48:05 PM	System		Change Request merged	Cost Share Project	empty	:1, 2	

Completed

Details

Supplier Status

Sent To Supplier

Supplier

LOWE'S HOME CENTERS INC

Total (40.63 USD)

Subtotal

40.63

40.63

Requisition: 3522992

Change Requests: 3522951

Voucher: IT000951

What's next?

The PO shows changes to funding and quantities on each line, and successful sync with PeopleSoft.

Changing Funding on an Invoiced PO:

Blanket (amount based) POs

- Blanket (amount based) POs count down a lump sum to zero.
- This is most often used for services engagements, such as consultant hours.
- For this reason, when a funding change occurs, it is best to **close out the line** with the old funding to limit it to the amount paid and **move the balance to a new line** with new funding.
- **This scenario can also be applied to any non-catalog order by quantity with funding splits and partial invoicing.**



Change Requests • 3522999

Assign Draft

Submit Request

Summary PO Preview External Communication Comments Attachments History

Changes will not be sent to the Supplier.

Change Request Reason

Reason change funding source from FACL112113 to FACL112116

Accounting Codes

Work Order Number	SpeedType	Purpose	Fund	Dept	Program	Source	Project ID	User Ref	Cost Share Project
N/A	FACL112113	FACL112113	OPBAS	05802	OPMNT	no value	no value	no value	no value
N/A	FINANCIAL SERVICES	FINANCIAL SERVICES	OPERATING BASIC	FACIL & AUXL SVC	OPNS & MAINT OF PLANT				

1 Item

ROBERT HALF INTERNATIONAL INC - 1 Item - 44,000.00 USD

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 Accountemps to provide professional accounting services to Facilities Finance for approximately 10 weeks to assist UD team...		EA	44,000.00	1 EA	44,000.00

Draft	
Total (44,000.00 USD)	
Subtotal	44,000.00
	44,000.00

Related Documents

You cannot change accounting at the header since it has already been invoiced.

Override

Delivery Options
Accounting Codes

You could change accounting at the line by percentage, but this would apply to all future invoices in that split.

Summary PO Preview External Communication Comments Attachments History

In this case, the best practice would be to keep the old values in the header and line 1 and move the remaining balance to a **new line**.

Change Request Reason

Reason

change funding source from FACL112113 to FACL112116

Accounting Codes

Work Order Number	SpeedType	Purpose	Fund	Dept	Program	Source	Project ID	User Ref	Cost Share Project
N/A	FACL112113	FACL112113	OPBAS	05802	OPMNT	no value	no value	no value	no value
N/A	FINANCIAL SERVICES	FINANCIAL SERVICES	OPERATING BASIC	FACIL & AUXL SVC FIN & MGT SVC	OPNS & MAINT OF PLANT				

1 Item

Click the **ellipsis** and select **Add Non-Catalog** item to begin.

ROBERT HALF INTERNATIONAL INC · 1 Item · 44,000.00 USD

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1 Accountemps to provide professional accounting services to Facilities Finance for approximately 10 weeks to assist UD team...		EA	44,000.00	1 EA	44,000.00	...

Draft

00.00 USD)

Subtotal 44,000.00

44,000.00

Related Documents

Purchase Order: UDBT000117

Requisition: 3522997

What's next for my order?

...

Add Non-Catalog Item



UNIVERSITY OF DELAWARE
EXCHANGE

TEST SITE

AllSearch (Alt+Q)0.00 USD

45

Unit Request

Char

Sup

1

Ch

Res

Ac

W

Nu

N/

N/

1

R

Add Non-Catalog Item

×

ROBERT HALF INTERNATIONAL, INC.

Fulfillment Address

MAIN - 12400 CO

Copy and paste the **Description** from line 1.

Enter the **balance** remaining on the PO (\$41,920.00) into the **Price** field.

Item

▼

Description ★

Supplier Item Number

Quantity ★

Price

Packaging

Accountemps to provide professional accounting services to Facilities Finance for approximately 10 weeks to assist UD team with year end processing. Approximate start date July 6, 2021. Rate \$110 per hour.

1

41920

EA

47 characters remaining

Additional Details

▼

Commodity Code

80000000

🔍

★ Required fields

🔒 Preferred

Click **Save**.

→

Save

Save And Add Another

Close



Change Requests • 3522999

Summary PO Preview External Communication Comments Attachments History

Changes will not be sent to the Supplier.

You will now have 2 lines on the change request.
For the original line 1, click on the **blue description link** to **edit the Price** down to the paid amount (\$2,080.00).
Click **Save**.

Non Catalog Item

ROBERT HALF INTERNATIONAL INC

Number	SpeedType	Purpose	Fund	Dept
N/A	FACL112113	FACL112113	OPBAS	05802
N/A	FINANCIAL SERVICES	FINANCIAL SERVICES	OPERATING BASIC	FACIL & A
				FIN & MG

professional accounting
47 characters remaining

Quantity ★	Price	Packaging
1	2080	EA

Additional Details

Commodity Code 80000000

★ Required fields

Save Close

2 Items

ROBERT HALF INTERNATIONAL INC • 2 Items • 85,920.00 USD

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1	Accountemps to provide professional accounting services to Facilities Finance for approximately 10 weeks to assist UD team...	EA	44,000.00	1 EA	44,000.00
2	Accountemps to provide professional accounting services to Facilities Finance for approximately 10 weeks to assist UD team...	EA	41,920.00	1 EA	41,920.00

85,920.00
85,920.00





Change Requests • 3522999



Assign Draft

Submit Request

Summary

PO Preview

External Communication

Comments

Attachments

History

Changes will not be sent to the Supplier.

The total of the PO should be back to the original amount.

Change Request Reason

Reason change funding source from FACL112113 to FACL112116

Accounting Codes

Work Order Number	SpeedType	Purpose	Fund	Dept	Program	Source	Project ID	User Ref	Cost Share Project
N/A	FACL112113	FACL112113	OPBAS	05802	OPMNT	no value	no value	no value	no value
N/A	FINANCIAL SERVICES	FINANCIAL SERVICES	OPERATING BASIC	FACIL & AUXL SVC FIN & MGT SVC	OPNS & MAINT OF PLANT				

2 Items

ROBERT HALF INTERNA

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 Accountemps to provide professional accounting services to Facilities Finance for approximately 10 weeks to assist UD team...		EA	2,080.00	1 EA	2,080.00
2 Accountemps to provide professional accounting services to Facilities Finance for approximately 10 weeks to assist UD team...		EA	41,920.00	1 EA	41,920.00

Override

Delivery Options

Accounting Codes



Draft

Total (44,000.00 USD)

Subtotal 44,000.00

44,000.00

Related Documents

Purchase Order: UDBT000117

Requisition: 3522997

What's next for my order?



Summary PO Preview External Communication Comments Attachments History

Change Request Reason

Reason chan

The old value should still be in the header and on line 1, and the new value for the balance showing in the new line 2.

Accounting Codes

Values vary by line. [Copy to other lines](#)

Work Order Number	SpeedType	Purpose	Fund	Dept	Program	Source	Project ID	User Ref	Cost Share Project
N/A	FACL112113	FACL112113	OPBAS	05802	OPMNT	no value	no value	no value	no value
N/A	FINANCIAL SERVICES	FINANCIAL SERVICES	OPERATING BASIC	FACIL & AUXL SVC FIN & MGT SVC	OPNS & MAINT OF PLANT				

2 Items

ROBERT HALF INTERNATIONAL INC - 2 Items - 44,000.00 USD									
Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price			
1	Accountemps to provide professional accounting services to Facilities Finance for approximately 10 weeks to assis...		EA	2,080.00	1EA	2,080.00			
This line item has been added									
2	Accountemps to provide professional accounting services to Facilities Finance for approximately 10 weeks to assis...		EA	41,920.00	1EA	41,920.00			
ACCOUNTING CODES									
Work Order Number	SpeedType	Purpose	Fund	Dept	Program	Source	Project ID	User Ref	Cost Share Project

Values have been overridden for this line

COAs from both funding sources will be in the approval routing.

Purpose: FACL112113 (FINANCIAL SERVICES): (All Values)
Sally Toliver
ud-mart@udel.edu
Purpose: FACL112116 (HR SERVICES): (All Values)
Sally Toliver
ud-mart@udel.edu

The Change Request highlights what changes were made.

UNIVERSITY OF DELAWARE

EXCHANGE

TEST SITE

Purchase Order • UDBT000117 Revision 1

Change Requests • 3522955

Reason: no value

Accounting Codes

Values vary by line.

Work Order Number	SpeedType	Purpose	Fund	Dept	Program	Source	Project ID	User Ref	Cost Share Project
N/A	FACIL112113	FACIL112113	OPBAS	05802	OPMNT	no value	no value	no value	no value
N/A	FINANCIAL SERVICES	FINANCIAL SERVICES	OPERATING BASIC	FACIL & ADJL SVC	OPNS & MAINT OF PLANT	FIN & MGT SVC			

1 Item

ROBERT HALF INTERNATIONAL INC

1 Item • 41,920.00 USD

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 Accountemps to provide professional accounting services to Facilities Finance for approximately 10 weeks to assist UD team...		EA	41,920.00	1 EA	41,920.00

ACCOUNTING CODES

Values have been overridden for this line

Work Order Number	SpeedType	Purpose	Fund	Dept	Program	Source	Project ID	User Ref	Cost Share Project
N/A	FACIL112116	FACIL112116	OPBAS	05802	OPMNT	no value	no value	no value	no value
N/A	HR SERVICES	HR SERVICES	OPERATING BASIC	FACIL & ADJL SVC	OPNS & MAINT OF PLANT	FIN & MGT SVC			

Draft

Correct these issues.

You are unable to proceed until addressed.

Change Request Reason Required

Total (41,920.00 USD)

Subtotal 41,920.00

41,920.00

Related Documents

Purchase Order: UDBT000117

Requisition: 3522997

What's next for my order?

History

Voucher Total	Invoiced By
850.00 USD	Pickering, Kristen
1,230.00 USD	Pickering, Kristen

Voucher Qty/Cost	Status
n/a / 2,080.00 USD	Net Invoiced
n/a / 41,920.00 USD	Open

Completed

Details

Supplier Status

Sent To Supplier

Supplier

ROBERT HALF INTERNATIONAL INC

Total (44,000.00 USD)

Subtotal 44,000.00

44,000.00

Related Documents

Requisition: 3522997

Change Requests: 3522999

Voucher: IT000952

Voucher: IT000953

What's next?

Once the Change Request has completed workflow, there will only be one **open** line (\$41,920.00) for Accounts Payable to voucher against. There will also only be one line for you to edit on any future change requests.



Change Requests: Zero Dollar Lines

- POs are quantity based by default – they count down a **quantity** of items to zero.
- By checking the **multi-invoice/payment box** at the header, you set the PO to amount based – it ignores quantity and counts down the **amount** to zero.
- As a result, if you have that multi-invoice/payment box checked, you cannot start a line at zero dollars. The system believes you have already finished your PO line before it's even started!
- To override this, you must **check the PO Type Override (POTO) box** for that line.
- **Please Note!** If you *add* funds to a zero dollar line on a future change request, you must remember to *uncheck* that box so that it is able to count down to zero.



Purchase Order • UDRT000050 Revision 2

Status Summary Revisions 2 Confirmations Shipments Change Requests 1 Receipts Vouchers Comments 1 Attachments History

1	✓	First year award Procurement Request: Subaward Request	10,153.00	Qty: 1	10,153.00
ITEM DETAILS					
Commodity Code	RO-SUB / Research Office Subawards <\$25K - to be used on Subaward form only, not to be used with any Goods or Services purchase.		PO Type Override	✗	
Account Code	153200 C&G SUBCONTRACT-AMT UP TO \$25K				
2	✓	Placeholder Procurement Request: Subaward Request	0.00	Qty: 1	0.00
ITEM DETAILS					
Taxable	✗	Requisition Number	3356902 view print		
Capital Expense	✗	External Note	no value		
Commodity Code	RO-SUB2 / Research Office Subawards >\$25K - to be used on Subaward form only, not to be used with any Goods or Services purchase.		Attachments for supplier		
Account Code	153300 C & G SUBCONTRACTS-AMT>\$25K		PO Type Override	✓	

This subaward was initially set up with a zero dollar placeholder on line 2 for future funding. The **PO Type Override** box was checked to accommodate the zero dollar value.

Completed

Details

MARYLAND UNIV OF - EASTERN SHORE

Total (10,153.00 USD)

Subtotal 10,153.00

10,153.00

Related Documents

Requisition: 3356902

Change Requests: 3363250

What's next?

Change Requests

3523002

...

Assign Draft

Submit Request

Summary

PO Preview

External Communication

Comments

Attachments

History

Change Request Reason

Reason

Increase for Year 2 funding

The change request has been created, *but* for change requests to subawards and other form-based POs, you must *return to the form* to make changes. Click the **blue link with the name of the form type** to open it.

2 Items

MARYLAND UNIV OF - EASTERN SHORE - 2 Items - 10,153.00 USD

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
<div><div>Subaward Request</div><div>Contract: no value</div></div>						
1	First year award		10,153.00	1	10,153.00	...
2	Placeholder		0.00	1	0.00	...

Draft

Total (10,153.00 USD)

Subtotal 10,153.00

10,153.00

Related Documents

Purchase Order: UDRT000050

Requisition: 3356902

What's next for my order?



Shop > Shopping > View Forms

Back to Change Request

Subaward Request

Form Number680089

PurposeProcurement Request

StatusOn Document

Instructions

Suppliers

Attachments

Form Fields

Review and Submit

Form Fields - Subaward

Request Actions | History | ?

★ Response Is Required

Subaward Details

Please complete the following fields as outlined below:

- Total Amount** (*Unit Price*): Equals funding for the first budget period; split between Line 1 & Line 2 based on total amount of the award; dependent on total amount and if overhead is being charged.
- Subaward Description/Comments** (*Product Description*): Details of the subaward. Please leverage the following format.

Subaward on **[PI NAME]**'s prime award from **[PRIME SPONSOR]** project titled "**[ENTER PROJECT]**." This action funds Year **XX** at a rate of **\$XXXXXX.00**. The sub recipient shall perform the work in accordance with the statement of work for the period of **MM/DD/YY- MM/DD/YY**. Total shall not exceed **\$XXX,XXX.00**.

- All invoices are required to be received electronically at subaward-invoices@udel.edu.
- THIS IS AN OFFICE OF SPONSORED RESEARCH SUB RECIPIENT AND THE VENDOR SHOULD NOT RECEIVE A COPY OF THE PURCHASE ORDER; by design, the resulting PO won't be sent to the supplier.
- The original agreement and statement of work are in OSP.

Department Grant Administrator (required for Invoice approval) ★

Margot McCabe

PreviousSave on Change RequestNext

Click on the **Form Fields** area on the menu then scroll down to make changes to the lines.



Shop ▸ Shopping ▸ View Forms

Services purchase.

For subawards less than \$25,000, please enter the following values:

- "0" in the Unit Price field
- "Placeholder" in the Product Description

This line is needed if the resulting Purchase Order needs to be increased in the future.

For subawards greater than \$25,000, please enter the following details:

- Unit Price = Balance of the Award less the overhead (i.e. \$75,000 = \$100,000 - \$25,000)
- Product Description = Subaward description/comments

Make the necessary changes in the **price and description fields** on each line.
Click **Save on Change Request**.

Unit Price	<input type="text" value="1500.00"/>	USD	Quantity	1	Total	0.00 USD
Product Description	<div><div>Second year award</div><div>983 characters remaining</div></div>					
Commodity Code	RO-SUB2 - Research Office Subawards >\$25K - to be used on Subaward form only, not to be used with any Goods or Services purchase.					
Prior to submitting this request for approval, I will mark the cart for "Multi-Invoice/Payment". *						
< Previous			Save on Change Request		Next >	



Back to Change Request

Subaward Request

Form Number **680089**
Purpose **Procurement Request**
Status **On Document**

Instructions

Attachments

Form Fields

Review and Submit

Form Fields - Subaward

Request Actions History ?

★ Response Is Required

Subaward Details

Once the changes are saved click **Back to Change Request** in the top left of the screen.

- **Total Amount (Unit Price):** Equals funding for the first budget period, split between Line 1 & Line 2 based on total amount of the award, dependent on total amount and if overhead is being charged.
- **Subaward Description/Comments (Product Description):** Details of the subaward. Please leverage the following format.

Subaward on [PI NAME]'s prime award from [PRIME SPONSOR] project titled "[ENTER PROJECT]." This action funds Year **XX** at a rate of **\$XXXXXX.00**. The sub recipient shall perform the work in accordance with the statement of work for the period of **MM/DD/YY- MM/DD/YY**. Total shall not exceed **\$XXX,XXX.00**.

- All invoices are required to be received electronically at subaward-invoices@udel.edu.
- THIS IS AN OFFICE OF SPONSORED RESEARCH SUB RECIPIENT AND THE VENDOR SHOULD NOT RECEIVE A COPY OF THE PURCHASE ORDER; by design, the resulting PO won't be sent to the supplier.
- The original agreement and statement of work are in OSP.

Department Grant Administrator (required for Invoice approval) ★

Margot McCabe

Subaward Details - Line 1 (153200)



Contract: no value

1	First and second year award	25,000.00	1	25,000.00	...
---	-----------------------------	-----------	---	-----------	-----

^ ITEM DETAILS

Remember your POTO box!

Since you've **added funding** to line 2, you need to **uncheck the POTO box** on that line. Click the **pencil** to edit.

PO Type Override >

2	Second year award	1,500.00	1	1,500.00	...
---	-------------------	----------	---	----------	-----

^ ITEM DETAILS

Commodity Code RO-SUB2 / Research Office Subawards >\$25K - to be used on Subaward form only, not to be used with any Goods or Services purchase.

Internal Note/Business Justification	<i>no value</i>
--------------------------------------	-----------------

Internal Attachments [Add](#)

Account Code **153300**
C & G SUBCONTRACTS-AMT>\$25K

External Note	<i>no value</i>
---------------	-----------------

Attachments for supplier [Add](#)

PO Type Override 

Draft

Total (26,500.00 USD)

Subtotal	26,500.00
----------	-----------

26,500.00

nts

ORT000050

02

what's next for my order?

Edit Line 2: Item Details

Contract:

1 First and second year award

25,000.00

Qty: 1

25,000.00

Commodity Code *

RO-SUB

Internal Note/Business Justification

Click on the existing check mark to **uncheck the POTO box**, and then when an empty POTO box is showing, click **Save**.

expand | clear

Account Code *

1000 characters remaining

expand | clear

PO Type Override



2 Second year award

1,500.00

Qty: 1

1,500.00

Commodity Code *

RO-SUB2

Internal Note/Business Justification

Goods or

This step is especially important for subawards because:

- Unlike regular POs, subawards do not route to Procurement to be reviewed and fixed if needed.
- If the POTO box is not unchecked, one single invoice of any amount will close the line.

1000 characters remaining

expand | clear

External Note

1000 characters remaining

expand | clear

PO Type Override



Save

Close

Changes to Form-based POs

- Subawards, NPOPs and Waivers of Bid Requests (prior to FY23) are done on forms, as opposed to non-catalog orders, which can add and remove line items.
- Change requests involving forms behave differently. In most cases, you will not have the opportunity to make changes without assistance from Procurement Help, especially after a line has been fully invoiced.
- Please refer to the following slides for best practices in managing change requests for each of these payment types.



Changes to Form-based POs: What about NPOPs?

- Change requests are NOT suggested for NPOPs (Non-PO Payments)
- The purpose of an NPOP is different than a purchase order: An NPOP is only a vehicle for payment.
- The distinction between a PO and an NPOP is whether the payment is sourceable: are there multiple suppliers? Are price and terms negotiable?
- NPOPs can be used to make scheduled payments over a period of time, such as for a lease.
- If an NPOP with recurring payments has a funding source change, please request that Procurement Help *close* the existing NPOP, releasing the remaining funds, and then submit a new NPOP for the balance with the new funding source.



Changes to Form-based POs: Subawards

- Each subaward form adds two lines to the purchase order, one for each account code: 153200 and 153300
- Users are instructed to zero out a line with no funds (whether or not it will be increased later), and check the POTO box (**see slides 25-32**)
- For users who want more visibility regarding each year's funding, they are instructed to add multiple forms to their initial requisition
- If the funding changes during the life of the subaward, Procurement Help is required to add an additional form to the subaward as illustrated on **slides 36-39**.



Purchase Order • UDRT000050 Revision 3

Status Summary Revisions 4 Confirmations Shipments Change Requests 1 Receipts **Vouchers 1** Comments 1 Attachments History

Records found: 1, Totaling: 1,600.00 USD

Voucher No. ↓	Supplier Voucher No.	Voucher Date	Due Date	Voucher Type	Payment Status	Voucher Total	Invoiced By
IT000954	invoice1	3/10/2022	4/9/2022	Voucher	Payable	1,600.00 USD	Pickering, Kristen

Line Details

Line No.	Product Name	Catalog No.	Unit Price	Qty/UOM	Extended Price	Voucher Qty/Cost	Status
1	First and second year award		25,000.00 USD	1	25,000.00 USD	n/a / 23,400.00 USD n/a / 1,600.00 USD	Open Net Invoiced
2	Second year award		1,500.00 USD	1	1,500.00 USD	n/a / 1,500.00 USD n/a / 0.00 USD	Open Net Invoiced

This subaward needs a funding change.

The only invoice is against line 1 overhead, but because it has been invoiced, we cannot override the line's funding.

Line 2 is fully open and can be changed with no issue.

Completed

Details

Supplier Status

New Order

Supplier

MARYLAND UNIV OF - EASTERN SHORE

Total (26,500.00 USD)

Subtotal	26,500.00
	26,500.00

Related Documents

Requisition: 3356902

Change Requests: 3523002

Change Requests: 3363250

Voucher: IT000954

What's next?

Change Requests

3523006

Assign Draft Submit Request

Summary PO Preview External Communication Comments Attachments History

2 Items

MARYLAND UNIV OF - EASTERN SHORE - 2 Items - 26,500.00 USD

SUPPLIER DETAILS

Contract no value PO Number UDRT000050

The change request for a subaward will not offer an option on the line menu for users to add another line.

Item Catalog No. Size/Packaging Unit Price Quantity Ext. Price

Subaward Request

Contract: no value

1 First and second year award 25,000.00 1 25,000.00

ITEM DETAILS

Commodity Code	RO-SUB / Research Office Subawards <\$25K - to be used on Subaward form only, not to be used with any Goods or Services purchase.	Internal Note/Business Justification	no value
		Internal Attachments	Add
Account Code	153200 C&G SUBCONTRACT-AMT UP TO \$25K	External Note	no value
		Attachments for supplier	Add
		PO Type Override	X

Cancel Selected Items

Change Request Reason Required

Total (26,500.00 USD)

Subtotal 26,500.00
26,500.00

Related Documents

Purchase Order: UDRT000050
Requisition: 3356902

What's next for my order?



Purchase Order • UDRT000050 Revision 3

Status Summary Revisions 4 Confirmations Shipments Change Requests 2 Receipts Vouchers 1 **Comments 1** Attachments History

Records found: 1

Show comments for

Purchase Order ▾



ADD COMMENT



Funding has changed for this partially invoiced subawards. Please add blank lines for a change request.

896 characters remaining

[expand](#) | [clear](#)

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s) | [Add recipient](#)

- ☐ Dottie DPS (Prepared for) <ud-mart@udel.edu>
- ☐ Kristen Pickering (Prepared by) <kpick@udel.edu>
- ☒ Procurement Help <udexchange@udel.edu>

Attach file (optional)

Attachment Type ☒ File ☐ Link/URL

File Name

File

Choose File

Upload your file

Users will first need to add a PO Comment tagging Procurement Help asking for **two empty lines** to be added to the PO.

Completed

Details ▾

Supplier Status

New Order

Supplier

MARYLAND UNIV OF - EASTERN SHORE

Total (26,500.00 USD) ▾

Subtotal

26,500.00

26,500.00

Related Documents ▾

[Requisition: 3356902](#)[Change Requests: 33523002](#)[Change Requests: 3363250](#)[Voucher: IT000954](#)

What's next? ▾



UNIVERSITY OF DELAWARE

EXCHANGE

TEST SITE

All

Search (Alt+Q)

0.00 USD

4

8

Purchase Order • UDRT000050 Revision 4

Status

Summary

Revisions 4

Confirmations

Shipments

Change Requests 2

Receipts

Vouchers 1

Comments 1

Attachments

History

4 Items

Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
	Subaward Request Contract: <i>no value</i>					
1	First and second year award Procurement Request: Subaward Request			25,000.00	Qty: 1	25,000.00
2	Second year award Procurement Request: Subaward Request			1,500.00	Qty: 1	1,500.00
	Subaward Request Contract: <i>no value</i>					
3	placeholder line 1 Procurement Request: Subaward Request			0.00	Qty: 1	0.00
4	placeholder line 2 Procurement Request: Subaward Request			0.00	Qty: 1	0.00

Completed

Details

Supplier Status

New Order

Supplier

MARYLAND UNIV OF - EASTERN SHORE

Total (26,500.00 USD)

Subtotal

26,500.00

Related Documents

[Requisition: 3356902](#)
[Change Requests: 3523002](#)
[Change Requests: 3363250](#)
[Voucher: IT000954](#)

Once Procurement Help has added two new placeholder lines, you can create a change request.

Lines 1 and 2 can be reduced to the *paid* amount.

The new funding can be added to lines 3 and 4 only **with the POTO box UNCHECKED to allow for invoicing after they are increased.**



Changes to Form-based POs: *Legacy Bid Waivers*

- On **July 1, 2022**, Procurement Services transitioned to using Non-Catalog POs for bid waivers, with a required attachment justifying the waiver.
- Legacy UDX Waiver of Bid Request forms (WOB orders created *before 7/1/2022*) required users to check off up to ten boxes, depending on how many line items are needed on the PO.
- If additional lines were needed, users were advised to add an additional bid waiver form to their draft cart.
- This form made change requests difficult to handle, especially for later additions and deletions from the form, which is why the transition was made to Non-Catalog orders with an attachment..
- Changes to Legacy Waiver of Bid Request forms *created prior to 7/1/2022* are handled as illustrated on **slides 41-49**.



Purchase Order • UDBT000106 Revision 4





4 of 24 Results ▾

Status Summary Revisions 4 Confirmations Shipments Change Requests 2 Receipts Vouchers 1 Comments 2 Attachments 1 History

Records found: 1, Totaling: 9,096.50 USD

Voucher No. ▾	Supplier Voucher No.	Voucher Date	Due Date	Voucher Type	Payment Status	Voucher Total	Invoiced By
IT000941 ↗	1256	3/15/2022	3/15/2022	Voucher	Payable	9,096.50 USD	Pickering, Kristen

Line Details

Line No.	Product Name	Catalog No.	Unit Price	Qty/UOM	Extended Price	Voucher Qty/Cost	Status
1	 Line item 1 on attached quote....		79.10 USD	250	19,775.00 USD	n/a / 10,678.50 USD n/a / 9,096.50 USD	Open Net Invoiced
2	 Certification		2,600.00 USD	1	2,600.00 USD	n/a /	Open
4	 Dry Ice, \$75/box		75.00 USD	1	75.00 USD	n/a / 75.00 USD	Open
5	 Temperature recorder, \$40.		40.00 USD	1	40.00 USD	n/a / 40.00 USD	Open

Completed

Details ▾

Supplier Status

Sent To Supplier

Supplier

PATZ MATERIALS AND TECHNOLOGIE

Total (25,890.00 USD) ▾

Subtotal	25,890.00
	25,890.00

Scenario 1:

The PO has been partially paid and you need to cancel the temperature recorder on line 5.

What's next? ▸

Shop

Shopping

View Forms

Back to Change Request

Waiver of Bid Request

Form Number 680094

Purpose Procurement Request

Status On Document

Instructions

Suppliers

Attachments

Form Fields

Line Details

Waiver Details

Review and Submit

Form Fields - Line Details

Request Actions History ?

★ Response Is Required

On This Page

Grant Funding (1)

Product or Service Details (11)

Grant Funding

In the following pages, select one or more of the procurement policy provisions below that allows an exception to the University's bidding requirements for procuring goods or services valued \$10,000 or greater, followed by a Supporting Narrative. IS THIS PURCHASE FEDERALLY FUNDED? ★

☒ Yes ☐ No

Product or Service Details

Select the appropriate number of line items required to complete the Purchase Order to the Supplier (to include Product, Accessories, Shipping/Freight, etc.). If three (3) lines are required, click the checkbox for Line 1, 2 & 3. ★

☒ 1

☒ 2

☒ 3

☒ 4

☒ 5

☐ 6

☐ 7

☐ 8

☐ 9

☐ 10

Line 1

First, you will need to create a Change Request on the PO, then click on the *blue Waiver of Bid Request Form link* in the line items area to navigate to the **Waiver of Bid Request form** itself.

Once in the form, it is tempting to uncheck the box on Line 5, but this will cause major issues with PeopleSoft.





Shop ▸ Shopping ▸ [View Forms](#)

based on shipping cost

897 characters remaining

Commodity Code

78000000 - Transportation, Storage & Mail Services

Edit

Line 4

Unit Price

75.00

USD

Quantity

1

Total

75.00 USD

Instead, scroll to **line 5** on the form, add **“Cancel”** to the description, and **change the price to zero**.

984 characters remaining

Commodity Code

78000000 - Transportation, Storage & Mail Services

Edit

Line 5

Unit Price

0

USD

Quantity

1

Total

40.00 USD

Product Description

CANCEL - Temperature recorder, \$40.

965 characters remaining

Commodity Code

31000000 - Manufacturing Components & Supplies

Edit

Click Save on Change Request.

Previous

Save on Change Request

Next



UNIVERSITY OF DELAWARE EXCHANGE

TEST SITE

Shop

Shopping

View Forms

Back to Change Request

Waiver of Bid Request

Form Number680094

PurposeProcurement Request

StatusOn Document

Instructions

Suppliers

Attachments

Form Fields

Waiver Details

Review and Submit

Form Fields - Line Details

Request Actions

History

?

On This Page

Grant Funding (1)

Product or Service Details (11)

Grant Funding

In the following pages, select one or more of the procurement policy provisions below that allows an exception to the University's bidding requirements for procuring goods or services valued \$10,000 or greater, followed by a Supporting Narrative. IS THIS PURCHASE FEDERALLY FUNDED? *

Product or Service Details

Select the appropriate number of line items required to complete the Purchase Order to the Supplier (to include Product, Accessories, Shipping/Freight, etc.). If three (3) lines are required, click the checkbox for Line 1, 2 & 3. *

☒ 1

☒ 2

☒ 3

☒ 4

☒ 5

☐ 6

☐ 7

☐ 8

☐ 9

☐ 10

Line 1

Unit Price

79.10

USD

Quantity

250

Total

19,775.00 USD

Product Description

Line item 1 on

Previous

Save on Change Request

Next

Return to the Change Request using the “Back to Change Request” link in the top left of the form.

Powered by JAGGAER

Privacy Policy

UNIVERSITY OF DELAWARE

44

Powered by JAGGAER | Privacy Policy

Change Requests • 3523007

Summary PO Preview External Communication Comments Attachments 1 History

PO Type Override

×

4 Dry Ice, \$75/box

75.00

1

75.00

...

ITEM DETAILS

Commodity Code 78000000 / Transportation, Storage & Mail Services

Internal Note/Business Justification no value

External Note no value

Attachments for supplier Add

PO Type Override

×

5 CANCEL - Temperature recorder, \$40.

0.00

1

0.00

...

ITEM DETAILS

Commodity Code 31000000 / Manufacturing Components & Supplies

Internal Note/Business Justification no value

Internal Attachments Add

External Note no value

Attachments for supplier Add

PO Type Override

×

Draft

Total (25,850.00 USD)

Subtotal 25,850.00

25,850.00

Purchase Order UDBT000106

Requisition: 3457935

What's next for my order?

If it's a UDB purchase order, don't forget to check that POTO box line to tell it to accept a zero dollar item!

Click on the **Pencil** to edit the item details, including the **POTO** box.

Change Requests • 3523007

Summary PO Preview External Communication Comments Attachments 1 History

PO Type Override ✗

4	Dry Ice, \$75/box	75.00	1	75.00	...
---	-------------------	-------	---	-------	-----

ITEM DETAILS

Commodity Code 78000000 / Transportation, Storage & Mail Services

Internal Note/B...
Justification

Internal Attachm...

External Note

Attachments for

ITEM DETAILS

Commodity Code 31000000 / Manufacturing Components & Supplies

Account Code 141254
MANUFACTURING SUPPLIES

Internal Note/Business
Justification no value

Internal Attachments Add

External Note no value

Attachments for supplier Add

PO Type Override ✗

Draft

Total (25,850.00 USD)

Subtotal 25,850.00

25,850.00

Summary PO Preview **External Communication** Comments Attachments History

Resend to...

- ☐ Suppliers on Change Request
- ☒ ERP System Connections on Change Request
- ☒ POExport

Cancellations *must* route to the supplier. Please be sure you've selected "Resend to Suppliers on Change Request" on the External Communication tab before submitting.

Purchase Order • UDBT000106 Revision 6



1 of 1 Results ▾

Status Summary Revisions 7 Confirmations Shipments Change Requests 2 Receipts **Vouchers 2** Comments 2 Attachments 1 History

2	Certification package, \$2,600.	2,600.00 USD	1	2,600.00 USD	n/a / 2,600.00 USD	Open
3	Estimated shipping cost...	3,400.00 USD	1	3,400.00 USD	n/a / 3,400.00 USD	Open
4	Dry Ice, \$75/box	75.00 USD	1	75.00 USD	n/a / 75.00 USD	Open
5	CANCEL - Temperature...	0.00 USD	1	0.00 USD		
6	another line	300.00 USD	1	300.00 USD	n/a / 300.00 USD	Net Invoiced
7	another line	400.00 USD	1	400.00 USD	n/a /	Open
				300.00 USD	n/a / 300.00 USD	Net Invoiced
10	another line	700.00 USD	1	700.00 USD	n/a / 350.00 USD	Open
					n/a / 350.00 USD	Net Invoiced

Scenario 2:

This PO already has ten line items and you need more lines to add additional items or to accommodate funding changes.

Completed**Details** ▾

Supplier Status

Sent To Supplier

Supplier

PATZ MATERIALS AND TECHNOLOGIE

Total (28,350.00 USD) ▾

Subtotal 28,350.00

28,350.00[Change Requests: 3523007](#)[Change Requests: 3457949](#)[Voucher: IT000941](#)[Voucher: IT000955](#)**What's next?** ▸

Purchase Order • UDBT000106 Revision 6

Status Summary Revisions 7 Confirmations Shipments Change Requests 4 Receipts Vouchers 2 Comments 4 Attachments 1 History

Records found: 4

Show comments for Purchase Order ▾



ADD COMMENT

Please add additional lines to this form for a change request.

938 characters remaining

[expand](#) | [clear](#)

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s) | [Add recipient](#)

☐ Kristen Pickering (Prepared by, Prepared for) <kpick@udel.edu>

☒ Procurement Help <udexchange@udel.edu>

Attach file (optional)

Attachment Type ☒ File ☐ Link/URL

File Name

The only way to add lines to a legacy Waiver of Bid Request form is to ask Procurement Help to add an additional Bid Waiver form to this PO via a PO Comment.



Purchase Order • UDBT000106 Revision 7

- Status
- Summary
- Revisions 8
- Confirmations
- Shipments
- Change Requests 2
- Receipts
- Vouchers 2
- Comments 7
- Attachments 1
- History

Procurement Request: Waiver of Bid Request						
3	✓	Estimated shipping cost \$1,400 (estimate based on shipping cost of prior order with Patz PO UDB0000065) Procurement Request: Waiver of Bid Request	3,400.00	Qty: 1	3,400.00	...
4	✓	Dry Ice, \$75/box Procurement Request: Waiver of Bid Request	75.00	Qty: 1	75.00	...
5	✓	CANCEL - Temperature recorder, \$40.	0.00	Qty: 1	0.00	...
8	✓	another line Procurement Request: Waiver of Bid Request	500.00	Qty: 1	500.00	...
9	✓	another line Procurement Request: Waiver of Bid Request	600.00	Qty: 1	600.00	...
10	✓	another line Procurement Request: Waiver of Bid Request	700.00	Qty: 1	700.00	...
⏏ Waiver of Bid Request ... <input type="checkbox"/>						
Contract: no value						
11	✓	placeholder Procurement Request: Waiver of Bid Request	0.00	Qty: 1	0.00	...

Completed

Details

Supplier Status

Sent To Supplier

28,350.00

Related Documents

Requisition: 3457935

Change Requests: 3523010

Change Requests: 3523007

Change Requests: 3457949

Voucher: IT000941

Voucher: IT000955

What's next?

Procurement Help will add another WOB form to the PO with the capacity of up to 10 more lines. You can now initiate a change request and begin your changes on the newly added Waiver of Bid Request lines. Remember to un-check the POTO box on any zero dollar lines!



Handling Closed Purchase Orders

- NOTE: Any administrative edits to purchase orders performed by Procurement Help in order to allow a user to initiate a change request do NOT move through to PeopleSoft. They exist only to open a line or create a line to edit on a Change Request.
- Change Requests must still go through all required approvals before they are merged with the PO and sent through to PeopleSoft.
- If you have **questions or issues** with creating a change request, please **do not** tag Procurement Help on the PO. Instead, send training-related questions to procurement@udel.edu or bring them to a drop-in help session for the support team to assist.



Handling Closed Purchase Orders: **Standard POs**

- Standard (UDS) POs soft close once the *quantity* is fully invoiced.
- You will be able to initiate a change request if the PO has been vouchered under or over the PO amount, but not if it has been vouchered exactly.
- Requesting that Procurement Help reopen a fully invoiced/vouchered PO will not allow you to initiate a change request since there is still nothing to change.
- **ALWAYS** submit the purchase order for the full amount budgeted for the expense. Please do NOT try to “trick” the system by adding an extraneous line item just to keep a PO open for potential future expenses.



Status

Summary

Revisions

1

Confirmations

Shipments

Change Requests

Receipts

Vouchers

1

Comments

1

Attachments

History

⚠

This PO is in Soft Close status so no edits can be made to this PO and no receipts or vouchers can be entered. To take these actions, open the PO.

Records found: 1

Show comments for

Purchase Order

▼

+

Robert Requester

- 11/16/2022 11:01:27 AM

Purchase Order - UDST001144

Comment Added

↩

Please reopen this PO.

Email sent: Procurement Help <udexchange@udel.edu>

Completed

Details

▼

Supplier Status

Sent To Supplier

Supplier

CANON FINANCIAL SERVICES INC.

Total (15,600.00 USD)

▼

Subtotal	15,600.00
	<hr/>
	15,600.00

Requisition: 3637096

🖨

Voucher: IT001035

🖨

What's next?

▼

Workflow Status

● Completed

Workflow

📄 🖨

This PO is fully invoiced and soft closed. The user is asking Procurement Help to reopen the PO.





Purchase Order • CANON FINANCIAL SERVICES INC. • UDST001144 Revision 0

13 of 13 Results

Status Summary Revisions 1 Confirmations Shipments Change Requests Receipts Vouchers 1 Comments 2 Attachments History

Records found: 0

No change requests have been created

Once the PO is reopened, there is still no option in the actions menu to create a change request since all lines were fully invoiced and are closed.

- Add Comment
- Add Notes to History
- Create Quantity Receipt
- Print Fax Version

Details

Supplier Status

Sent To Supplier

Supplier

CANON FINANCIAL SERVICES INC.

Total (15,600.00 USD)

Subtotal 15,600.00
15,600.00

Related Documents

Requisition: 3637096

Voucher: IT001035

What's next?

Workflow Status ● Completed

Workflow



Purchase Order • CANON FINANCIAL SERVICES INC. • UDST001144 Revision 0

Status Summary Revisions 1 Confirmations Shipments Change Requests Receipts Vouchers 1 Comments 3 Attachments History

Records found: 3

Show comments for Purchase Order +

Robert Requester - 11/16/2022 11:08:41 AM

Purchase Order - UDST001144 Comment Added ↻

Please reopen and add a line for a penny in order to proceed with a change request.

Email sent: Procurement Help <udexchange@udel.edu>

Procurement Help - 11/16/2022 11:03:45 AM

Purchase Order - UDST001144 Open ↻

per request

Robert Requester - 11/16/2022 11:01:27 AM

Purchase Order - UDST001144 Comment Added ↻

Please reopen this PO.

Email sent: Procurement Help <udexchange@udel.edu>

Completed

Details

Supplier Status

Sent To Supplier

Supplier

CANON FINANCIAL SERVICES INC.

Total (15,600.00 USD)

Subtotal 15,600.00

15,600.00

Related Documents

Requisition: 3637096

Instead, the user needs to ask Procurement Help to **reopen the PO and add a line for a penny** so that user can proceed with a change request.

Note: When the user creates the change request, it will **ONLY** allow them to edit the **new open line**.

Status

Summary

Revisions 1

Confirmations

Shipments

Change Requests

Receipts

Vouchers 1

Comments 3

Attachments

History

Records found: 0



No change requests have been created

- Add Comment
- Create Change Request
- Add Notes to History
- Create Quantity Receipt
- Print Fax Version

The user now has the ability to initiate a change request.

Details

Supplier Sta

Sent To Supplier

Supplier

CANON FINANCIAL SERVICES INC.

Total (15,600.01 USD)

Subtotal

15,600.01

15,600.01

Related Documents

Requisition: 3637096

Voucher: IT001035

What's next?

Workflow Status

Completed

Workflow



Change Requests • 3652723

- Summary
- PO Preview
- External Communication
- Comments
- Attachments
- History

1 Item

The change request offers only this new line to change.

CANON FINANCIAL SERVICES INC. • 1 Item • 0.01 USD

SUPPLIER DETAILS

Contractno valuePO NumberUDST001144

Quote numberno value

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1for change request		EA	0.01	1EA	0.01

ITEM DETAILS

Contract: no valueInternal Note/Business Justificationno value

Commodity Code no valueRequiredInternal AttachmentsAdd

Account Code no valueRequiredExternal Note no valueAttachments for supplierAdd

PO Type Override×

Draft

✖ Correct these issues.

You are unable to proceed until addressed.

Required: Commodity Code (Line 1)

Required: Account Code (Line 1)

Change Request Reason Required

Total (0.01 USD)

Subtotal0.01

0.01

Related Documents

Purchase Order: UDST001144

Requisition: 3637096

What's next for my order?

Next StepCOA Approver

ApproverValueff, George

Workflow

Handling Closed Purchase Orders: **Blanket POs**

- Blanket (UDB and UDR) POs soft close once the *dollar* amount is fully invoiced.
- You will be able to initiate a change request if the PO has been vouchered under or over the PO amount, but not if it is vouchered exactly.
- Requesting that Procurement Help reopen a fully invoiced/vouchered PO will not allow you to initiate a change request since there is nothing to change.
- **ALWAYS** submit the purchase order for the full amount budgeted for the expense. Please do NOT try to “trick” the system by adding a penny or other nominal amount to the line just to keep a PO open for potential future expenses.





Status Summary Revisions 1 Confirmations Shipments Change Requests Receipts **Vouchers 1** Comments Attachments 2 History

Records found: 1, Totaling: 15,350.00 USD

Voucher No. ↓	Supplier Voucher No.	Voucher Date	Due Date	Voucher Type	Payment Status	Voucher Total	Invoiced By
IT001099	overinvoice	11/16/2022	11/16/2022	Voucher	In Process	15,350.00 USD	Pickering, Kristen L

Line Details

Line No.	Product Name	Catalog No.	Unit Price	Qty/UOM	Extended Price	Voucher Qty/Cost	Status
1	MPTC-511 six position in-line Peltier temperaturecontrol system	7069-J011A	9,500.00 USD	1 EA	9,500.00 USD	n/a / 9,500.00 USD	Net Invoiced
2	Labor	Labor	2,370.00 USD	1 EA	2,370.00 USD	n/a / -630.00 USD n/a / 3,000.00 USD	Open Net Invoiced
3	Installation and Training		1,850.00 USD	1 EA	1,850.00 USD	n/a / 1,850.00 USD	Net Invoiced
4	Travel Zone 1 0-100 Miles from Service Center	travel	920.00 USD	1 EA	920.00 USD	n/a / -80.00 USD n/a / 1,000.00 USD	Open Net Invoiced

Completed

Details

Supplier Status
Sent To Supplier
Supplier
JASCO INC

Total (14,640.00 USD)

Subtotal 14,640.00
14,640.00

Related Documents

Requisition: 3621847
Voucher: IT001099

What's next?

Completed

In this situation, the PO has been *over-invoiced* on lines 2 and 4, and a change request is needed to add funds to release the voucher from a match exception and pay the voucher.



Change Requests • 3652687

Summary PO Preview External Communication Comments Attachments 2 History

Changes will not be sent to the Supplier.

2 Items

JASCO INC • 2 Items • 3,290.00 USD

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 Labor	Labor	EA	2,370.00	1 EA	2,370.00
2 Travel Zone 1 0-100 Miles from Service Center	travel	EA	920.00	1 EA	920.00

Draft

Correct these issues.

You are unable to proceed until addressed.

Change Request Reason Required

Total (3,290.00 USD)

Subtotal

3,290.00

3,290.00

Related Documents

Purchase Order: UDBT000124

Requisition: 3621847

What's next for my order?

Next Step

COA Approver

Approvers

Martin, Deirdre

Walueff, George

Xu, Chang

Workflow

The user ONLY has the ability to edit the over-invoiced lines.
Lines that are fully invoiced and matched do not show up on the change request.

Records found: 1, Totaling: 15,350.00 USD

Voucher No. ↓	Supplier Voucher No.	Voucher Date	Due Date	Voucher Type	Payment Status	Voucher Total	Invoiced By
IT001099	overinvoice	11/16/2022	11/16/2022	Voucher	In Process	15,350.00 USD	Pickering, Kristen L

Line Details

Line No.	Product Name	Catalog No.	Unit Price	Qty/UOM	Extended Price	Voucher Qty/Cost	Status
1	MPTC-511 six position in-line Peltier temperaturecontrol system	7069-J011A	9,500.00 USD	1 EA	9,500.00 USD	n/a / 9,500.00 USD	Net Invoiced
2	Labor	Labor	3,000.00 USD	1 EA	3,000.00 USD	n/a / 3,000.00 USD	Net Invoiced
3	Installation and Training		1,850.00 USD	1 EA	1,850.00 USD	n/a / 1,850.00 USD	Net Invoiced
4	Travel Zone 1 0-100 Miles from Service Center	travel	1,000.00 USD	1 EA	1,000.00 USD	n/a / 1,000.00 USD	Net Invoiced

Once the change request is complete and all lines have been fully invoiced for their amount, there is no longer an option in the actions menu to create a change request.

- Add Comment
- Add Notes to History
- Create Quantity Receipt
- Create Cost Receipt
- Print Fax Version

Details

Supplier Status

Sent To Supplier

Supplier

JASCO INC

Total (15,350.00 USD)

Subtotal 15,350.00

15,350.00

Related Documents

Requisition: 3621847

Change Requests: 3652687

Voucher: IT001099

Completed

Workflow

Records found: 1

Show comments forPurchase Order +

Robert Requester - 11/16/2022 11:55:36 AM

Purchase Order - UDBT000124Comment Added↶

There is a need for additional training on this PO. Please add a penny to line 3 (Installation and Training) so that we may initiate a change request.

Email sent: Procurement Help <udexchange@udel.edu>

If there is a need for further changes on the PO, the comment should tell Procurement Help whether a line should be increased incrementally, or a new line should be added for changes.

Completed

Details

Supplier Status

Sent To Supplier

Supplier

JASCO INC

Total (15,350.00 USD)

Subtotal	15,350.00
	15,350.00

Related Documents

[Requisition: 3621847](#)

[Change Requests: 3652687](#)

[Voucher: IT001099](#)

What's next?

Workflow StatusCompleted

Workflow

Change Requests • 3652691

Summary PO Preview External Communication Comments Attachments 2 History

1 Item

JASCO INC - 1 Item - 1,850.01 USD

SUPPLIER DETAILS MAIN : 28600 MARY'S COURT, EASTON, Maryland 216...

Contract no value PO Number UDBT000124

Quote number QUO-33620-P0Y5H2-1

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 Installation and Training		EA	1,850.01	1 EA	1,850.01

ITEM DETAILS

Contract: no value Internal Note/Business Justification no value

Commodity Code 86000000 / Education & Training Services Internal Attachments Add

Account Code 141239 External Note no value

EDUCATION AND TRAINING SRVC

The addition of funds to an amount-based line by Procurement Help makes it open and available for editing on a change request.

Draft

Correct these issues.
You are unable to proceed until addressed.

Change Request Reason Required

Total (1,850.01 USD)

Subtotal 1,850.01

1,850.01

Related Documents

Purchase Order: UDBT000124

Requisition: 3621847

What's next for my order?

Next Step COA Approver

Approvers Martin, Deirdre
Walueff, George
Xu, Chang

Workflow

In Summary:

- If a PO has been invoiced and changes to funding source are necessary, leave the header intact and make any changes at the line.
- For blanket or split funding, consider closing out a line to the vouchered amount and creating a new line with the new funding source and line balance.
- Remember to **uncheck** the POTO box if *adding* funds to a UDR or UDB line that was initially set to \$0.
- Forms require special handling and may need assistance from Procurement Help to add lines for funding changes.
- Procurement Help comments are only for requesting specific actions and not for questions or training support (instead, email procurement@udel.edu).



Questions:

- procurement@udel.edu

Resources:

- [Procurement Services Website](#)
- [Creating and Processing a PO Change Request](#)
- [The PO Type Override \(POTO\) Box](#)
- [About Procurement Help: What it is and when to use it](#)

