

## Scheduled Releases: Change Orders for Scheduled Releases

Occasionally a change is needed on a Scheduled Release. Change Orders are usually done shortly after the original Scheduled Release is entered. Most Change Orders are due to a change in the \$\$ amount originally entered. Several steps are required to complete a Change Order. To make changes, the Release must first be "unreserved". After making the changes, the Release must be "reapproved".

If a scheduled release has already been billed or received, contact the Purchasing Department before making the changes.

This learning cycle will demonstrate the process used to change an existing and approved Scheduled Release.

### Navigation

Using the SIU Department Buyer responsibility:

- Double-click **PO Summary** > **Enter PO #** and **Release #** in appropriate fields > click **Find**.
- From the PO Headers summary window; click **Open**.
- The Purchase Order Summary to Releases window displays your Release #.
- Notice the Status is **Approved, Reserved**.
  - Before we can change the Scheduled Release, we must first **Unreserve** it.

### Unreserving Funds

- Click the **Approve...** button.
- The Approve Document window opens with the Approval Details tabbed region displayed.
- Click in the **Unreserve** checkbox.
  - As soon as you check "Unreserve", the **Unreserve Date** field populates with the current date.
- Type a brief comment in the **Note** field explaining the change, e.g., "Change Quantity from \$30 to \$40. Cost was greater than anticipated."
- Click **OK** to **update** the status, **save** the note, and **close** this window.
- A **Decision** window displays a message: **Budgetary Control action completed successfully**.
- Press **Enter**.
- Look at the Status field. The release should now **Require Reapproval**.

### Changing the Shipment Line

- Now you can make the changes to the release.

**Remember:** On a PPO, the Quantity field is the dollar amount.

- Click in the **Quantity** field.
  - The field background automatically changes to yellow and highlights the number in the field.
- **Deselect** the number in the Quantity field by clicking behind the **last number**.
- **Select** it again and change the dollar amount accordingly.
- Press **Tab**.
  - The \$\$ amount entered in the Quantity field is automatically reflected in the **Total** field of the header.

### Changing the Attachment

- Since the cursor is resting on the Shipment line, be sure to check the paperclip icon on the Toolbar.
- If a piece of paper is in the paperclip, that means there is an **Attachment**. The Attachment will need to be updated too.
  - Click on the paperclip to open the Attachment window.
- The Attachments window displays any notes on the scheduled release shipment line.
  - The changes will be to the body of the Attachment.
- The first record line is selected by default; make that change first.
- Navigate to the body of the Attachment by tabbing through the region or by clicking in the body itself.
- Add the information that the cost increased from “x number of dollars” to “y number of dollars”.
- **Save** your work.
  - You can elect to AutoSave the attachment so that you don’t have to manually save each one individually.
- If the release shipment has two attachments, you will need to change both.
  - Make the same change to the other Attachments, if applicable.
- When all changes have been made, click the **Close Form** icon to exit the Attachments window.
- Closing the Attachment returns you to the Purchase Order Summary to Releases window.

### Changing the Distributions Region

- Next, you will need to change some of the information in the Distributions region.
- Click the **Distributions** button.
- The Distributions window opens with the **Destination** tabbed region displayed by default.
- You need to change the Quantity field to match the shipment line quantity.
  - Use the scroll bar to bring the field into view.
- Click in the Quantity field and make the same change here as you did in the Shipment Line above.
- **Tab** to the **GL Date** field.
- Change the GL Date to today's date using the LOV, if desired or by typing it into the field.
  - The date has to be entered in Oracle date format dd-mmm-yyyy.
- **Save** your work.
- A Note appears telling you that you "are creating a new document revision".
- Click **OK** or press **Enter** on the keyboard to close the Note window.
- Close the Distributions window using the **Oracle icon** on the window and selecting **Close**. Or click the “X” in the upper right corner of the Distributions window. You can also use the keyboard shortcut **CTRL + F4**.
  - **Do not** use the Close Form icon on the Toolbar; it will close the Release form and return you to the PO Header Summary window.
- You will return to the Purchase Order Summary to Releases window.
  - There should now be a number behind the Release number indicating a revision to the Release.

## Reapproving the Release

- The Status indicates that the Release has to be **Reapproved**.
- Click the **Approve...** button.
- When the Approval Details window opens, the Submit for Approval checkbox should be checked by default.
  - If it is not, go ahead and check it.

**Remember:** If you do not have approval authority, you will need to select the Forward checkbox and enter the name of the authorized approver in the Forward To field.

- Click in the **Note** field and enter an explanation as to why the Release was revised, e.g., Changed Total \$\$ amount from 30-40. Actual cost was greater than anticipated.
- Click **OK**.
- You will return to the Purchase Order Summary to Releases window.
- The Status is once again, Approved, Reserved.
- The Change Order is complete; you can now exit the form.
  - Click the Close Form icon twice to return to the Navigator.