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Creating a Change Order in Banner 9

Use the Change Order Page (FPACHAR) to revise header, commodity, and accounting information on the current purchase order or blanket order. There are some important exceptions when you revise purchase order information using the Change Order Form. You cannot change the Vendor, the Document Level Accounting indicator, or Currency code with a change order. In addition, you cannot change an Expense Purchase Order to a G/L Purchase Order or vice versa. The Document Level Accounting box in the Change Order Header Information Window indicates whether the purchase order or change order document assigns account distributions to the entire document in total or to specific commodities.

Figure 1

Change Order Main section

The main section contains the Purchase Order and Blanket Order number fields.

1. Enter the number of the purchase order or the blanket order which you want to revise.

To revise a blanket order, leave the Purchase Order field blank.

2. Enter NEXT in the Change Sequence Number field to have the system generate the next

available change sequence number.

You cannot generate a new change order sequence number until you complete, approve, and

post the previous purchase order and blanket order or both orders.

3. Alt + Page down to get to the next section.

Figure 2

Change Order Header Information section

A copy of the current header information defaults into this section; you can update the fields as

necessary.

Figure 3

1. The Order Date field represents the date associated with the change order. It

defaults to the system date, but may be changed. The purchase order date from the original

purchase order remains unchanged.

2. The Transaction Date is a required field that determines the fiscal period. It defaults to the

system date, but also may be changed.

3. The Buyer code is a required field. If you change the Discount code, the

system adjusts all items automatically for the new order.

4. The Document Level Accounting indicator defaults from the original order and cannot be

changed.

Because you cannot process a procurement document without both a commodity and an

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accounting record, the form automatically brings in a commodity from the purchase order.

This results in the system creating a commodity record for the change order, even though no

changes were made to the commodity. When you query the Purchase/Blanket/Change Order

Page (FPIPURR) for the specific change, a commodity record displays with zero amounts.

6. Click Document Text to access the Procurement Text Entry Page (FOAPOXT).

7. If you are changing only the header information on this order, return to the Balancing/

Completion section and complete the change order.

8. Alt + Page down to get to the next section.

Change Order Header Supplemental Data window

In this window, optional information such as the FOB Code, the chart of accounts Class Code, and

the Carrier may be changed. The Currency code cannot be changed.

If the current record has header text, you may copy it into the change order by checking the Copy

Text from Current box and selecting Save.

Alt + Page down to get to the next section.

Vendor Information window

The Vendor and Name (unlabeled) fields default and may not be changed.

You can enter and change information in both the vendor Address Code and Sequence Number

fields, but the combination of these fields must be valid for you to save the record.

Alt + Page down to get to the next section.

Figure 4

Document Indicators section

Complete the following steps for budget checking and deferred editing features.

1. Check the NSF Checking box to have the system perform budget checking online.

2. If the Deferred Editing box is cleared, ongoing editing of the document is performed by the system. Check this box to activate the deferred editing feature. This feature speeds up system processing, but disables the system from displaying online errors immediately.

Alt + Page down to get to the next section.

Change Order Commodity Data section

Use this window to revise the commodity information. The order and vendor information defaults.

Figure 5

1. You may check the Select Item box and press Enter to navigate to the Purchase Order Item

Selection Page (FPQCHAP) and select individual commodity items. The Purchase Order

Item Selection page lists the items from the original order. To select all of the items, check the

Change All box and click Save. To choose a specific item, check the box at the right of the item

record and click Save. To return to the Change Order section, select Exit.

2. Enter the Item number if you know it, or press Enter to enter or change the Commodity code

(or the commodity Description if you do not specify a commodity code).

3. The U/M field is required. After you enter the commodity, the unit of measure defaults from the

commodity, and if you desire, you can change it.

5. You may enter or modify the Quantity and Unit Price. The Extended Amount is calculated

automatically.

6. The system calculates the discount amounts, provided you enter a discount code in the Change

Order Header Information section. If not, you may enter a Discount Amount manually in this

section.

8. The Blanket Order Remaining Balance field displays only when the change order is

associated with a blanket order or the purchase order you enter is associated with a blanket

order. When this field displays, the amount shown can either represent the remaining balance

 for the entire blanket order document or the amount that remains for a specific commodity. The

definition of the displayed amount depends on the value in the Document Control indicator on

the Blanket Order Page (FPABLAR). You cannot enter any changes to the purchase order that

exceed the Remaining Blanket Order balance.

10. Click Added and Click Save or F10.

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Figure 6

11. Click X on top left corner to exit FPQCHAP.

Commodity Section

1. In the Unit Price change the purchase order amount. For example if I change it to 1000, the total of this PO will be $1000.

2. Uncheck distribute box

Alt + Page down to get to the next section.

Figure 7

Change Order Accounting Data window

The accounting data for existing commodities displays in this window.

You cannot enter information in the Sequence Number field. Also, you cannot enter information in the FOAPAL fields for an account sequence which exists on the current order. If you need a new FOAPAL sequence, delete (or zero out) the old amount on the old FOAPAL, select Insert Record, and enter all of the new accounting information.

The system generates a new sequence number when you save the record. If you use an account index, the system checks Override Indicators when you save the record. You can create multiple accounting sequences and distribute the amounts on a percentage or amount basis.

You have the following options when you enter accounting information:

• You can save the record without entering amounts. When you execute redistribution from the Change Order Commodity Data Window, the system assigns the extended amounts equally among the number of account distributions that you enter. If the document uses Document Level Accounting, the system distributes all commodity amounts. If this is a Commodity Level change order, the system only distributes the specific commodity amount among the assigned accounting sequences.

• You can manually enter the dollar amounts.

• You can manually enter the percentages.

Redistribution of commodity items depends on whether the Document Level Accounting box is checked:

• Checked - When you select Next section in the Change Order Commodity Data Window to execute the redistribution function, the system redistributes the total of all commodity items to the accounting records using the percentages you enter for each account distribution.

• Unchecked - The system only redistributes the specific commodity amount among the assigned accounting sequences based on the percentages you enter.

Move from one accounting sequence to another using the Next and Previous Record functions. To view the available budget, select Block Menu from any of the FOAPAL fields to access the Budget Availability Status Page (FGIBAVL).

Select Next section to access the Balancing/Completion Window. If you receive an insufficient funds

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message and you have authorization to override the budget, check the NSF Override box and click

or select Save again to recommit the record.

You can navigate to the following areas from this window:

• To navigate to the Currency Conversion Window, select Count Hits.

• To access the Balancing/Completion Window, select Next section.

• To view the available balance, click Budget Availability or select Block Menu from any of the

FOAPAL fields to access the Budget Availability Status Page (FGIBAVL).

• To view the accounting records, click View Accounting or select the menu option to access the

Commodities and Accounting for Review Query Page (FOICACT).

Balancing/Completion Window

The Balancing/Completion Window displays summary information. The amounts that display on the

Balancing /Completion Window reflect summary information for the entire order (items that you did

not change in addition to items you changed or added).

Figure 8

1. Click or select Complete to complete this document and return to the main window.

Figure 9

2. A Success message pops up "Document... is complete and forwarded to the Approval process."

End of change order process.