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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

=	X Change Order FPACHAR 9.3.6 (BANT0630)	🔒 ADD	A RELATED	* TOOLS
	Purchase Order: Blanket Order: .)	0	Go
*	Change Sequence:Number			
	Get Started. Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press E	TER.		
۹				
2				
?				

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.

Purchase Order: P0068987 Blanket Order: Contract of the sequence: NEXT Number
Number
at Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.

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

× Change Order	FPACHAR 9.3.6	(BANT0630)			🛃 ADD		i 🛃 REI	LATED	🗱 TOOL
Purchase Order: P0068	8987 Blanket Or	rder: Change Seque	nce Number: NEXT				(Start (Over-
CHANGE ORDER: DOCI	UMENT INFORMAT	TION				🖸 Insert	Delete	Copy	Ŷ, Fit
Purchase Order	P0068987		Delivery Date *	02/28/2018	Change Seq	NEXT			
Blanket Order			Comments			In Suspense			
Order Date *	02/28/2018		Commodity Total	409.9	3	Document T	ext		
Transaction Date *	10/18/2018		Accounting Total	409.93	3				
CHANGE ORDER: DOCI	UMENT INFORMAT	TION				🕄 Insert	Delete	Ра Сору	Ŧ, Fi
	Change Acco	ounting Only		Blanket Order	()				
				Termination Date					
Purchase Order Type	Regular				Rush Order				
Original Document	None				SF Checking				
Text									
Buyer Code *	LCC	LCC Universal Buyer			Deferred Editing				
Origin	BANNER			Reference Number					

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.

Change Orde	FPACHAR 9.3.6 (BANT0630				ADD		A REL	ATED	🗱 TOOL
irchase Order: P006	8987 Blanket Order: Cha	inge Sequence Number: NEXT						Start C	Over
CHANGE ORDER:VEND	DOR					D Insert	Deinte	Me Copy	Ŷ, Filt
Purchase Order	P0068987	Delivery Date	02/28/2018		Change Seq	NEX7			
Blanket Order		Comments				In Suspense	1		
Order Date	02/28/2018	Commodity Total	409.9			Document T	ext		
Transaction Date	06/30/2018	Accounting Total	409.9.						
CHANGE ORDER: VEN	DOR					🖬 Insert	Delete	🎜 Сору	Ÿ, Filte
Vendor	L00000714 McDonald V	holesale							
	Vendor Hold			City	Eugene				
Address Code	BU		State o	r Province	OR				
Sequence Number	1		ZIP or P	ostal Code	97402-2704				
				Nation					
Street Line 1	2350 W Broadway			Contact	[
Street Line 2	PO Box 2340			Email	0				
Street Line 3	(
	Country Cod	a Area	0-4-	Disease	Number		Extension		
Phone	Country Coo	a Area	Code	Phone	Number		Extension		
Fax									
				<u> </u>	-				
Discount			Class Code	نليا					
FOB Code			Carrier	L				63	
Tax Group			Currency					20	
	Disbursing Agent		Freight Terms						

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.

× Purchase Ord	er Item Selection FPQC	HAP 9.3.4 (BANT0630)				ADD		A RELA	TED 4	🗱 TOOL
Purchase Order:	P0068987		Blanket Order:	8					(50
Change Sequence: Number		1	Change All:							
	L00000714	McDonald Wholesale					🛱 insert	Delete	Copy	₹.Fih
Purchase Order Item	Commodity Code	Description	Exists	Line Item Text copy Option *	U/M	Units	Unit Pri			Added
	1	Invoice 2463517	N	Ignore	LOT		1	40	09.9300	
H - Toft > >	10 T Per Pa									ord 1 of

 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.

Purchase Order:	P0068987		Blanket Order:		Saved	successfully (1	rows saved)		
Change Sequence: Number Vendor:	L00000714	1 McDonald Wholesale	Change All:		Ouery	caused no reco	rds to be retriev	ed. Re-enter.	
	MMODITY INFORMATION					1	🕽 Insert 🛛 🖨 D	elete 📲 Copy	Y, Fille
FUNGINAL ONDER SC									
Purchase Order Item	Commodity Code	Description	Exists	Line Item Text copy Option *	U/M	Units	Unit Price		Added

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 Orde	ler FP/	ACHAR 9.	3.6 (BANT0630							🕂 ADD	RETRIEVE	A REI	ATED	TOOL
Purchase Order: P00	68987	Blanke	t Order: Cha	inge Sequence	Number: 1							1	Start (Dver
CHANGE ORDER: CO	MMOD	ITY/ACCO	UNTING								theent	Dolete	и Сору	Ŷ, Fil
Purchase Order	r PO	P0068987			Order Date	02/28/2018			Delivery Date	02/28/2018				
Blanket Order	r [[]				Tra	saction Date	06/30/2018				✓ Document Act	counting		
Change Sequence Number							In Suspense				Document Tex	đ		
COMMODITY											🕻 Insert	Delete	₩ Copy	Ŷ, FI
Item Commodity		Description	n		U/M *	Tax Group	Quantity	Unit Price		Commodity Text	t Item Text	1	Add Commo	dity
1		Invoice 24	463517		LOT			1.00	1,000.0000]
[K ≤ (1) of 1 ►	H		Per Page										Rec	ord 1 of
Extended Amount	t [1,000.00			Tax Amount		0.00			Distribute			
Discount Amount			0.00		Cor	nmodity Total		1,000.00			67			
Additional Amount	t [_		0.00		D	cument Total		1,000.00						
Additional Amount	t [0.00		D	cument Total		1,000.00			C Insert	Delete	Па Сору	Ŷ, Fil
		Year	0.00	Fund	Orgn	cument Total	t Prog	1,000.00	Locn	Proj	C Insert NSF Overrid		Copy NSF Susper	
ACCOUNTING Sequence CC 1 L	OA	18	Index			Acc	t Prog 220 310000	Actv	Locn	Proj		e	NSF Susper	ise]
ACCOUNTING	OA	18		Fund	Orgn	Acc		Actv	Locn	Proj	NSF Overrid	e	NSF Susper	ise]
ACCOUNTING Sequence CC 1 L	OA	18	Index	Fund	Orgn	0 640		Actv	Locn	Proj	NSF Overrid	e	NSF Susper	ise]
ACCOUNTING Sequence CC 1 L	OA H	18	Index • Per Page	Fund	Orgn	0 640	220 310000	Actv	Locn	Proj	NSF Overrid	e	NSF Susper	ise
ACCOUNTING Sequence CC 1 L	OA H	18	Index • Per Page	Fund	Orgn	0 640	220 310000 USD	Actv	Locn	Proj	NSF Overrid	e	NSF Susper	ise]
ACCOUNTING Sequence CC 1 L R 4 (1) of 1 P Extended Amount	OA H t	18	Index • Per Page	Fund	Orgn	0 640	220 310000 USD 1,000.00]	Actv	Loen	Proj	NSF Overrid	e	NSF Susper	ise]
ACCOUNTING Sequence CC 1 L K 4 Dof 1 K Extended Amount Discount	OA H t	18	Index • Per Page	Fund	Orgn	0 640	220 310000 USD 1,000.00 0.00	Actv	Locn	Proj	NSF Overrid	e	NSF Susper	ise]
ACCOUNTING Sequence CC 1 L Extended Amount Discount Additional	OA t t	18	Index • Per Page	Fund	Orgn	0 640	220 310000 USD 1.000.00 0.00	Actv	Locn	Proj	NSF Overrid	e	NSF Susper	ise]
ACCOUNTING Sequence CC 1 L Extended Amount Discount Additional Tax	OA H t t	18	Index • Per Page	Fund	Orgn	0 640	220 310000 USD 1.000.00 0.00 0.00	Actv	Locn	Proj	NSF Overrid	e	NSF Susper	ise]
ACCOUNTING Sequence CC 1 L Extended Amount Discount Additional Tax Document Total	DA t t i i	18	Index • Per Page	Fund	Orgn	0 640	220 310000 USD 1.000.00 0.00 0.00 1.000.00	Actv	Locn	Proj	NSF Overrid	e	NSF Susper	ise]

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

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).

K Change Order	TPACHAR 9.	3.6 (BANT0630)			+ AD	d 🖺 retrieve	A REL	ATED	100L
urchase Order: P006	8987 Blanket	t Order: Change Sequence Nur	nber: 1					Start (Over
BALANCING/COMPLET	ION					🖬 Insert	Delete	Pa Copy	₩, FI
Purchase Order	P0068987				Vendor Hold				
Change Sequence	f			Currency					
Number									
Blanket Order				Exchange Rate					
Vendor	L00000714	McDonald Wholesale							
Input Amount		1,000.00	Cor	verted Amount					
Input Amount	ION	1,000.00	Cor	iverted Amount		C Insert	Delete	Copy	Ŷ, FI
CALANCING COMPLET	ION ocess	1,000.00	Cor	verted Amount		C Insert	Delete	🖷 Сору	Ÿ, FI
CALANCING COMPLET		1,000.00 Header	Cor		ccounting	C insert	Delete Status	🤹 Сору	Ÿ, Fi
CALANCING COMPLET					ccounting			Copy	₹, Fa
Complete In Pr		Header	Commodity			В	Status	Copy	Ÿ, Fa
Complete In Pr Approved Amounts		Header 7,000.00	Commodity 1.000.00		1,000.00	8	Status	Copy	₹, Fi

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

Figure 8

X Change Order FPACHAR 9.3.6 (BANT0630)		🗈 ADO 🖺 RETRIEVE 🚢 RELATED 🏶 TOOLS 🚺
Purchase Order: P00583987	Blanket Order:	 Document P0088987 sequence 1 is completed and forwarded to the Approval process.
Change Sequence: 1 Number		U _
Get Started. Complete the fields above and click Go. To search by name	e, press TAB from an ID field, enter your search criteria,	and then press ENTER.

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

End of change order process.