# Oracle:
# Create a Change Order


Publish Date: 11/14/2022

REST (Real Estate Systems Training)

# Document Revision History

| Date | Version | Description |
|---|---|---|
| 02/27/2018 | 0.1 | Draft |
| 08/16/2018 | 1.0 | Publish |
| 01/21/2019 | 2.0 | Updated to include project date changes |
| 03/31/2020 | 3.0 | Updated screenshots to eliminate sensitive information. |
| 11/11/2020 | 3.1 | Updated to clarify importance of clicking **Submit to Buyer** button |
| 02/12/2021 | 3.2 | Updated to include instructions for adding messages and attachments |
| 06/17/2021 | 3.3 | Added information about the 240-character limit for the **Description** field |
| 10/13/2021 | 3.4 | Updated to reflect rejection notification to supplier and ability to request an attachment be added to the PO. |
| 01/11/2022 | 3.5 | Updated to include how to view **Accepted** and **UnAccepted** items. |
| 11/14/2022 | 3.6 | Updated to include details about expired BPA. |

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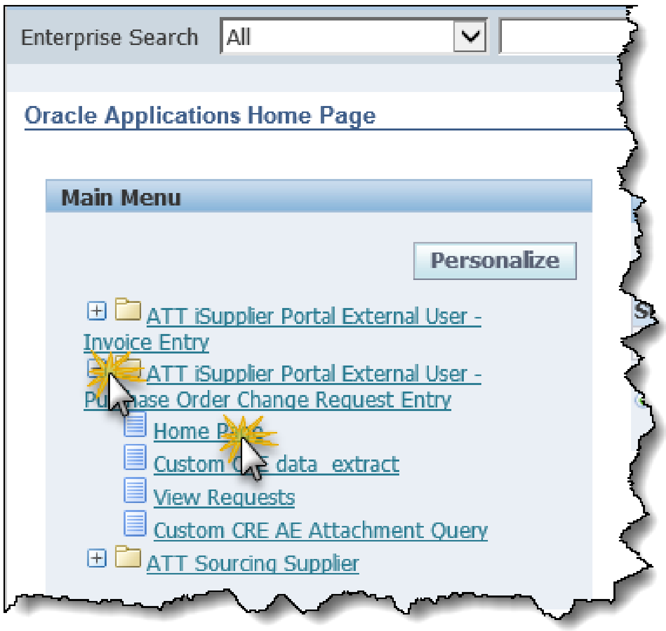
# Overview

A supplier with an authorized change order role can create a change order via the iSupplier portal and submit to a buyer for approval. The buyer will receive a notification that a change order has been submitted. The buyer cannot act on the change order until the supplier submits it.

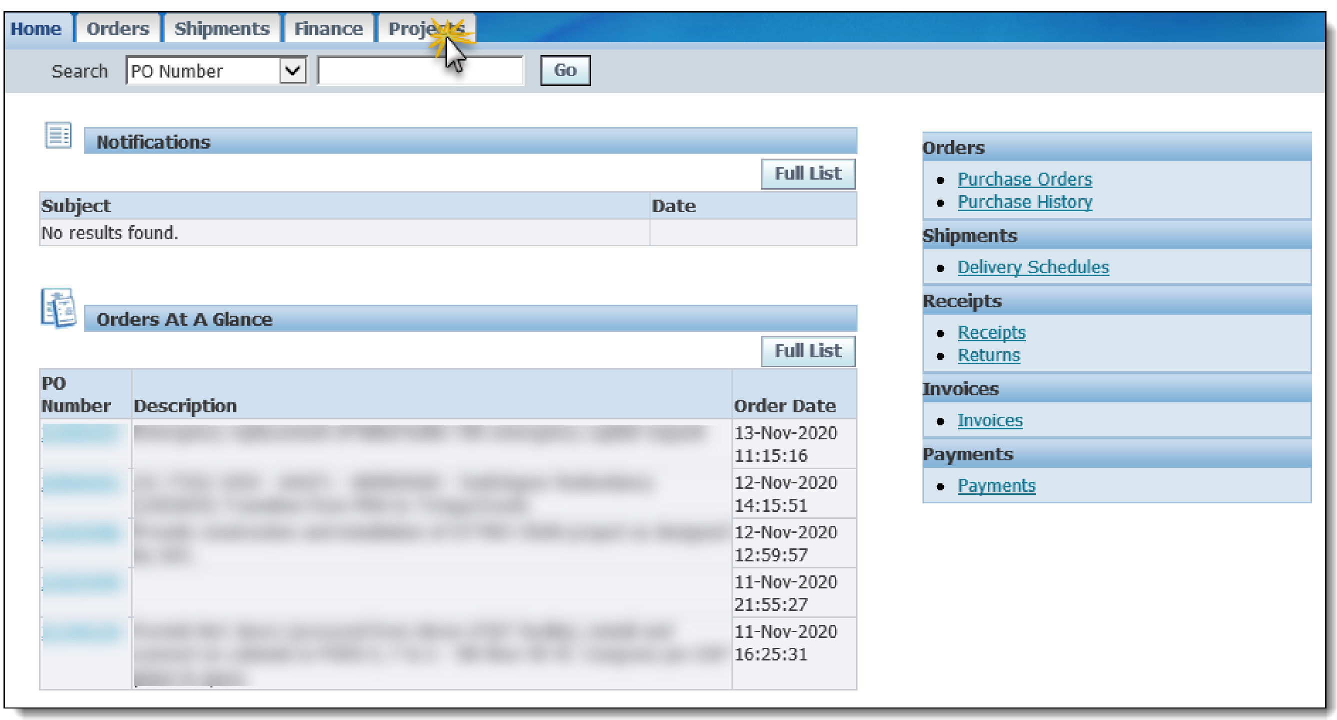
- Change orders can only be initiated by the supplier if a fee structure is in place for the master agreement. If one is not in place or if the purchase order is created outside of an agreement, the buyer must initiate the change.
- The purchase order must have a fee option used upon creation of the PO. If the PO was created without an authorized fee option, the buyer must make changes directly on the PO themselves.
- The PO must be in **Approved** status. If the PO is not approved, the supplier will not be able to create a change order.
- The BPA (blanket purchase agreement) must be active for the supplier to create a change order and for the buyer to approve the change order.
- Only one change order may be processed at a time. Multiple change orders are not allowed.
- While a change order is in a status of **In Process**, a supplier cannot make modifications to it.

# Steps

1. Log into Oracle.
2. Expand the **ATT iSupplier Portal External User – Purchase Order Change Request Entry** folder.
3. Select **Home Page** from the **Main Menu**.

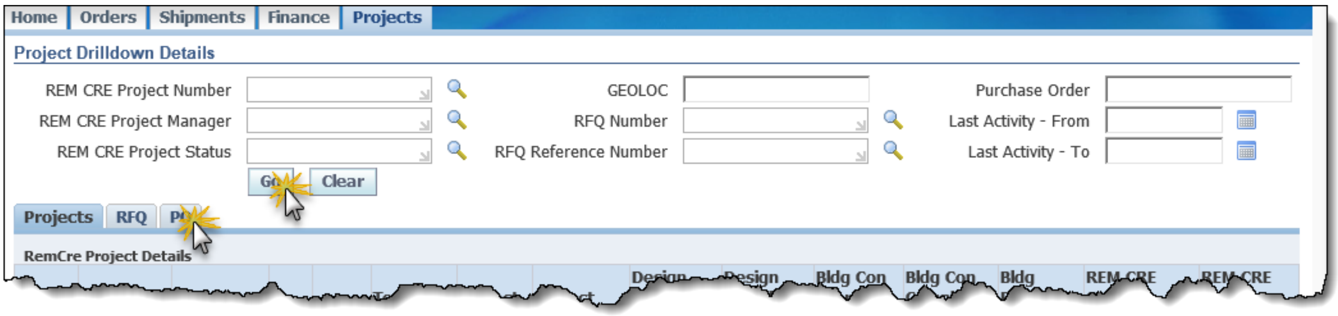



4. The **iSupplier Portal** is displayed. Click the **Projects** tab.

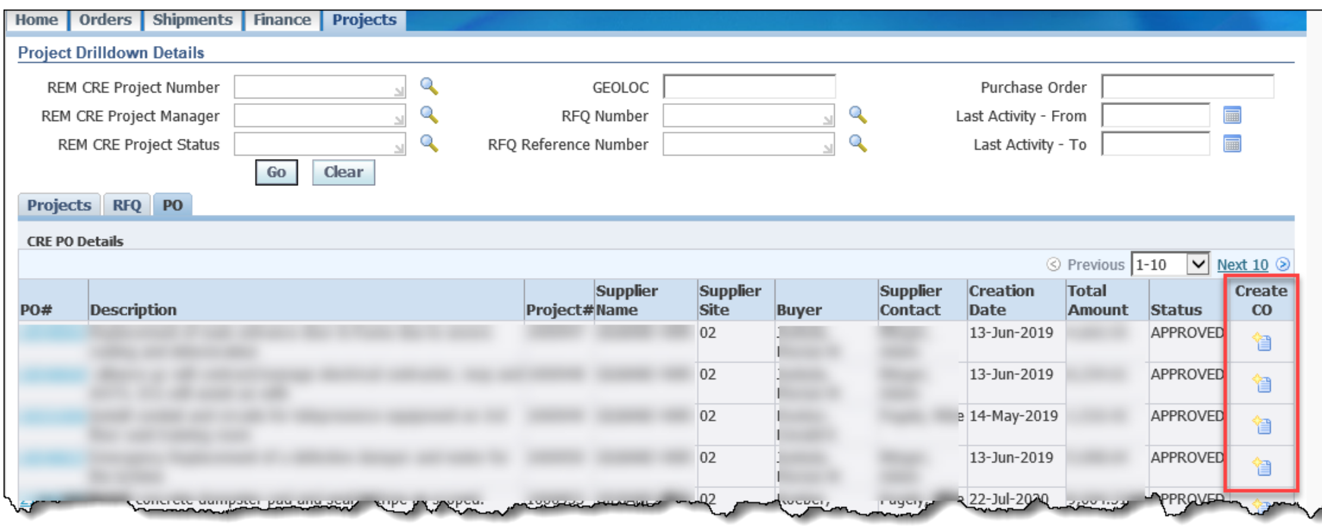


# Search for the Purchase Order

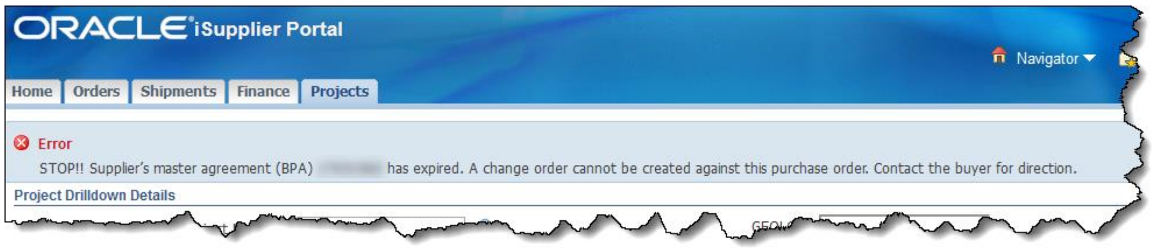
1. The **Project Drilldown Details** window is displayed. Search for the desired purchase order by entering it in the **Purchase Order** field of the **Project Drilldown Details** section or by using any of the additional search fields provided. You may have to clear other auto-populated fields (i.e. **Activity** fields).
2. Click **Go** to execute the search.
3. Click the **PO** tab.




4. The system displays a list of all purchase orders assigned to your company. Click  (**Create CO**) to the right of the purchase order. Only approved POs will have the icon enabled.

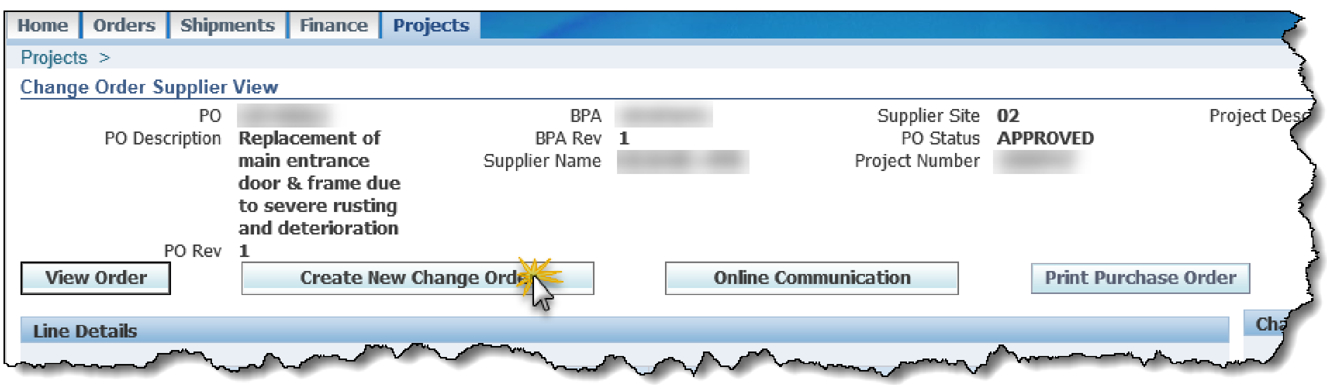


**Important!** You cannot create a change order on a purchase order with an expired agreement. If you attempt to do so, the system displays the following error message:




## Create Change Order

1. The **Change Order Supplier View** window is displayed. Click **Create New Change Order**. The button is only available if the purchase order is in a status of **Approved**. Only click the button once.

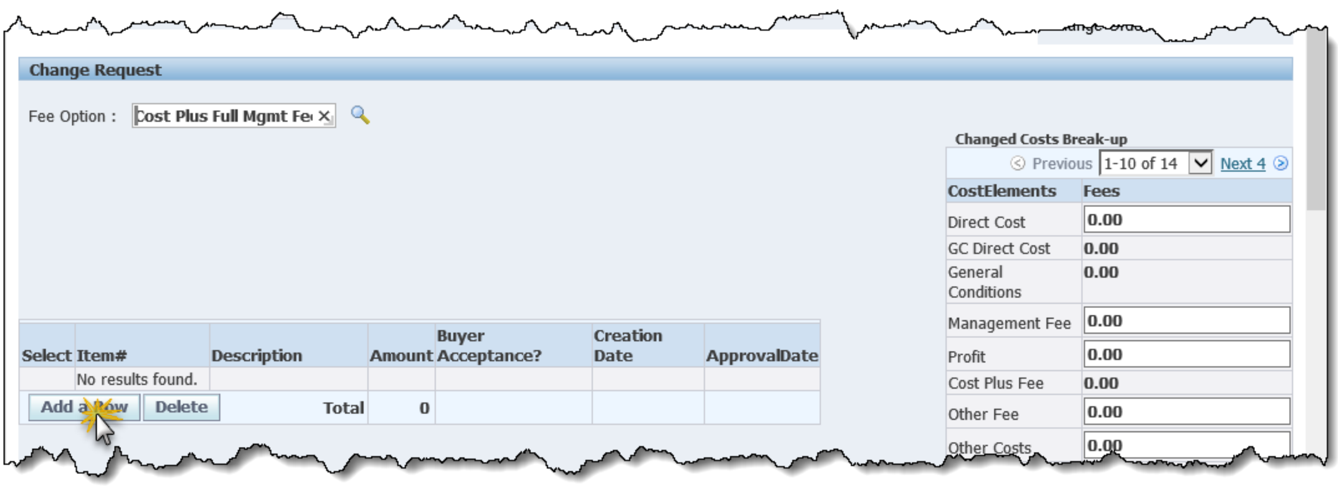



2. Click the radio button next to the service line to be modified. The fee options associated with the PO display in the **Change Request** section. If you will be making changes to multiple services lines, you'll take care of one service line at a time.

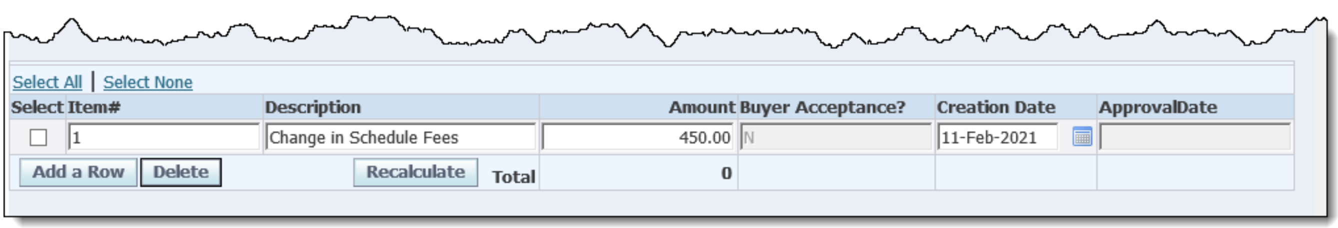
3. Click the magnifying glass next to fee option and click next to the appropriate fee structure (only applicable if more than one was added).


## Cost Changes

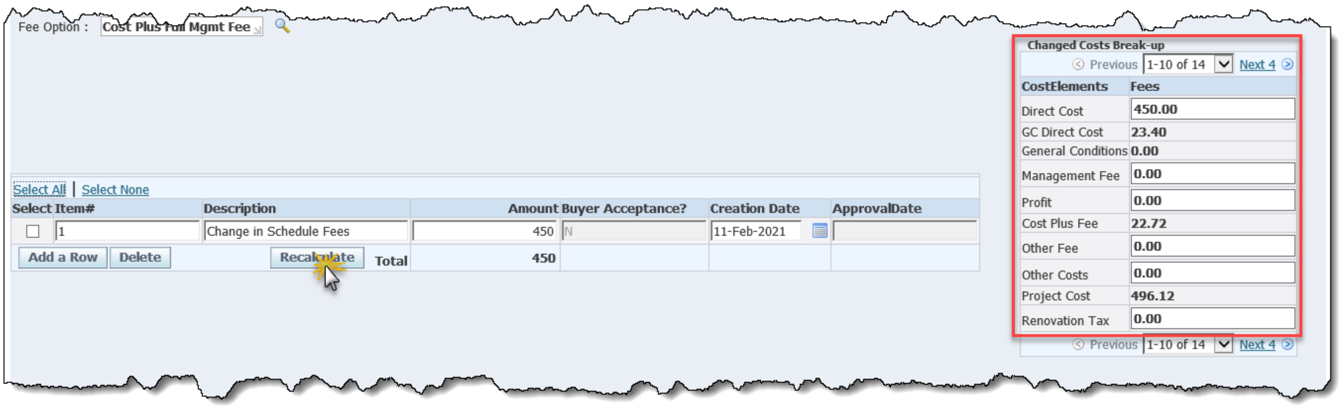
1. Click **Add a Row** in the **Change Request** section.




2. A blank row is added to your screen. List the **Item#**, **Description** (reason for the change, enter up to 240 characters), and **Amount** in the fields provided.

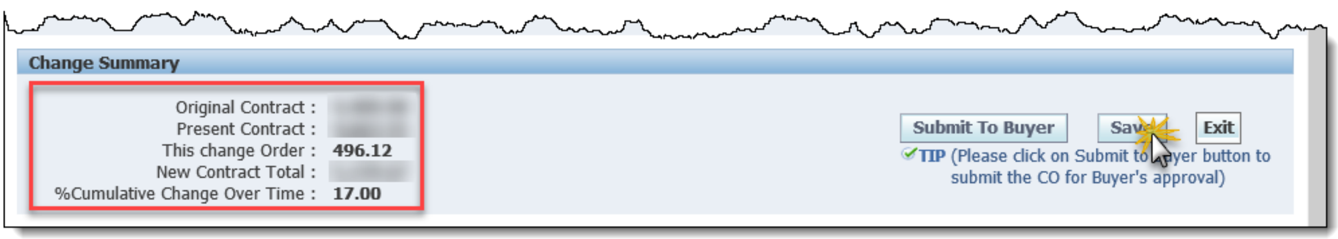


3. Click **Recalculate**.
4. Repeat steps 1-2 if an added cost breakdown is required. Click **Recalculate** after each added row. The fees will feed into the **Changed Costs Break-up** section to the right.




> **Important!** If multiple items/rows are included in the change order, the Buyer will have the ability to **Accept** or **UnAccept** the individual items/rows.

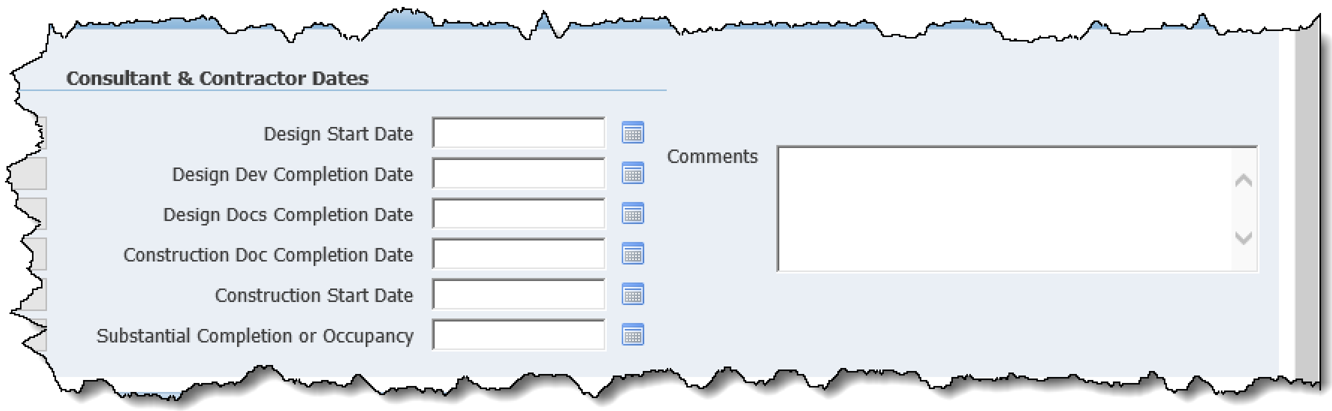
5. Click **Save**. Verify the summary of the changes (to date) that appear in the **Change Summary** section in the lower half of the screen.



## Date Changes

Modifications to project dates provided in the RFx bid can be made in the **Project Dates Details** section of the change order.

1. Populate the revised dates in the appropriate field of the **Consultant & Contractor Dates** column.
2. If you want to explain why the dates are changing, do so in the **Comments** field provided.

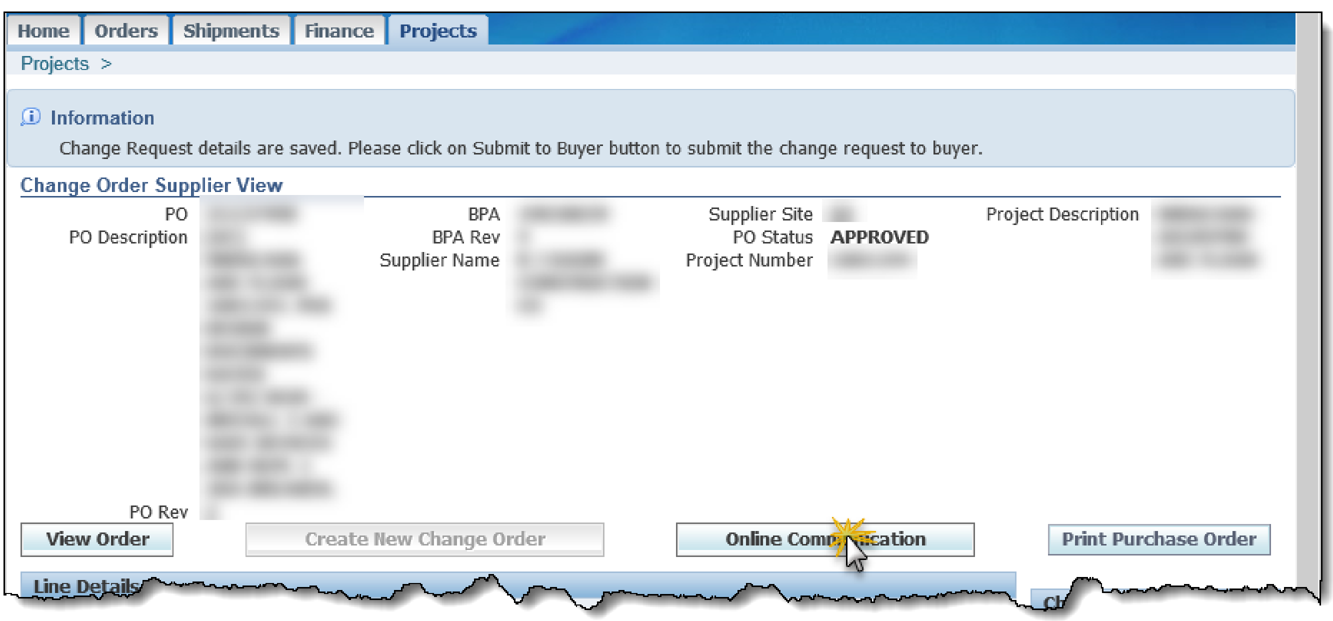



3. Click **Save**.

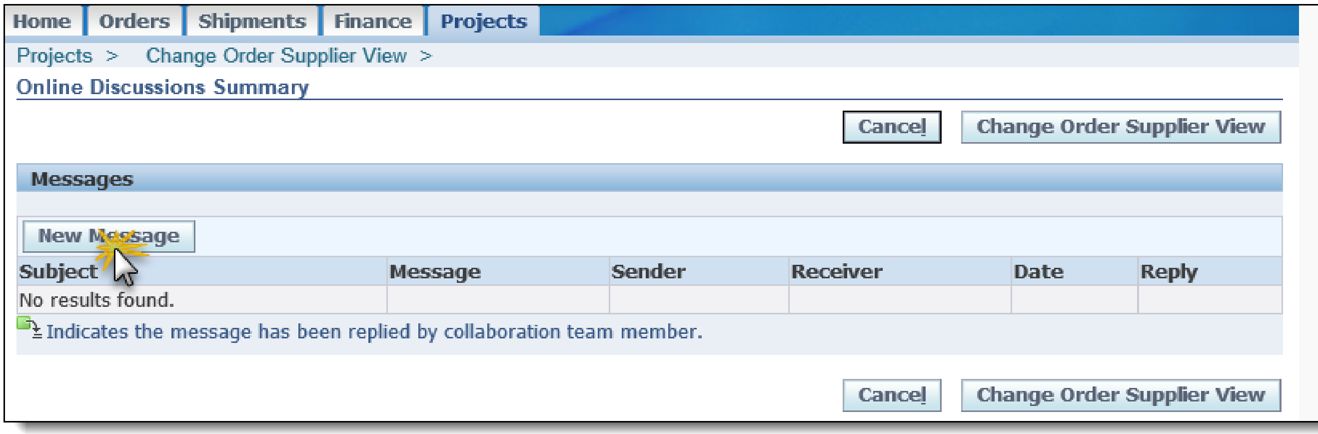
## Including Messages and Attachments

To add messages and attachments to your change order:

1. Click **Online Communication** in the **Change Order Supplier View**.



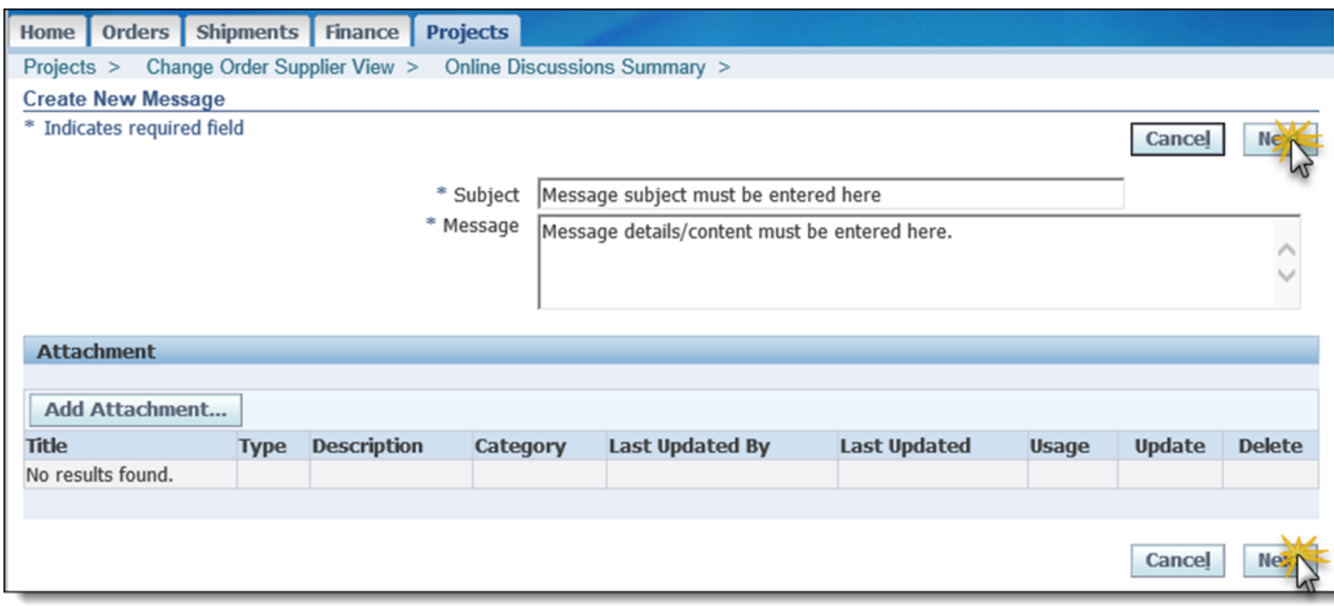
2. The system displays the **Online Discussion Summary** window. Click **New Message**.



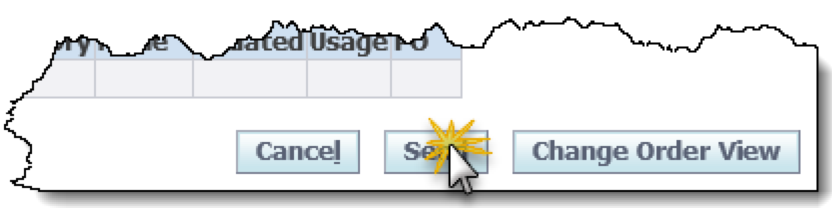

3. The system displays the **Create New Message** window.

## ***Adding a Message***

1. Enter **Subject** and **Message**.
2. If you want to include any attachments to the message before sending it, see [Adding an Attachment](#).
3. Click **Next**.



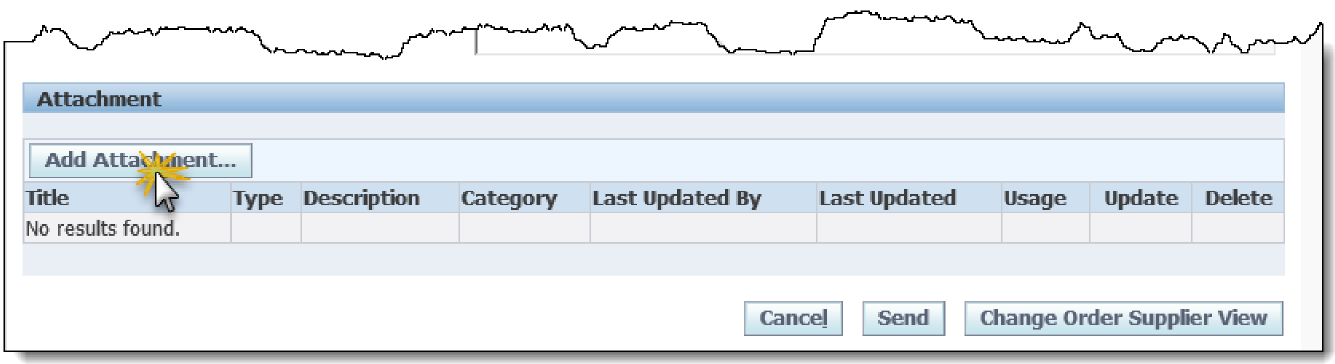

4. Click **Send**.



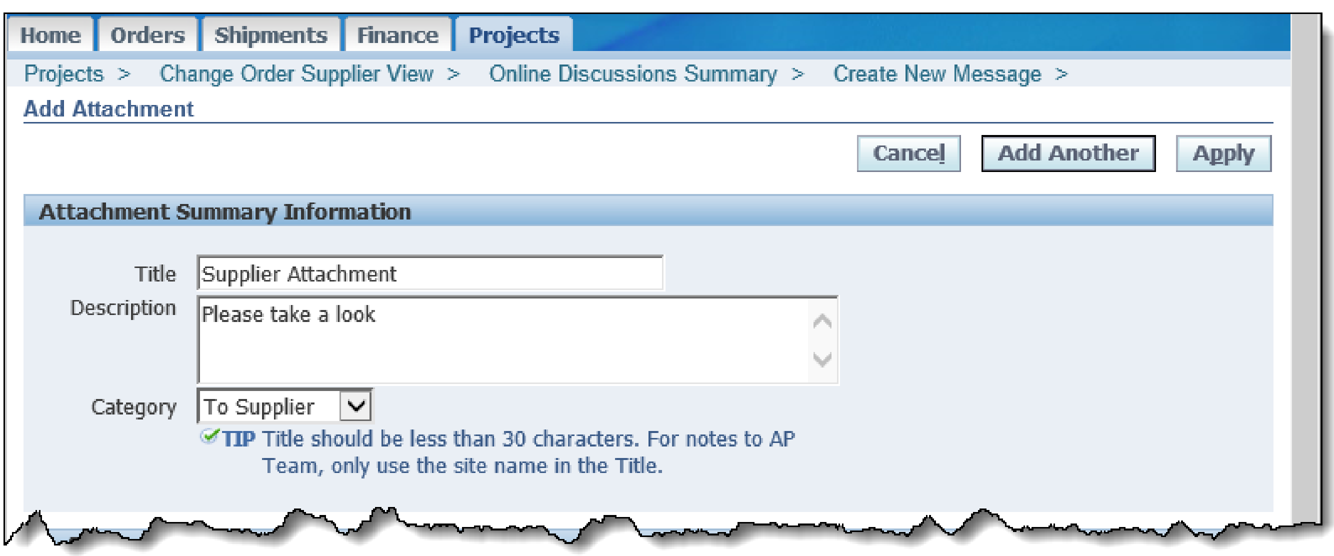
5. The system displays the **Online Discussions Summary** window. To return to the Change Order, click **Change Order Supplier View** in the lower right corner.


## *Adding an Attachment*

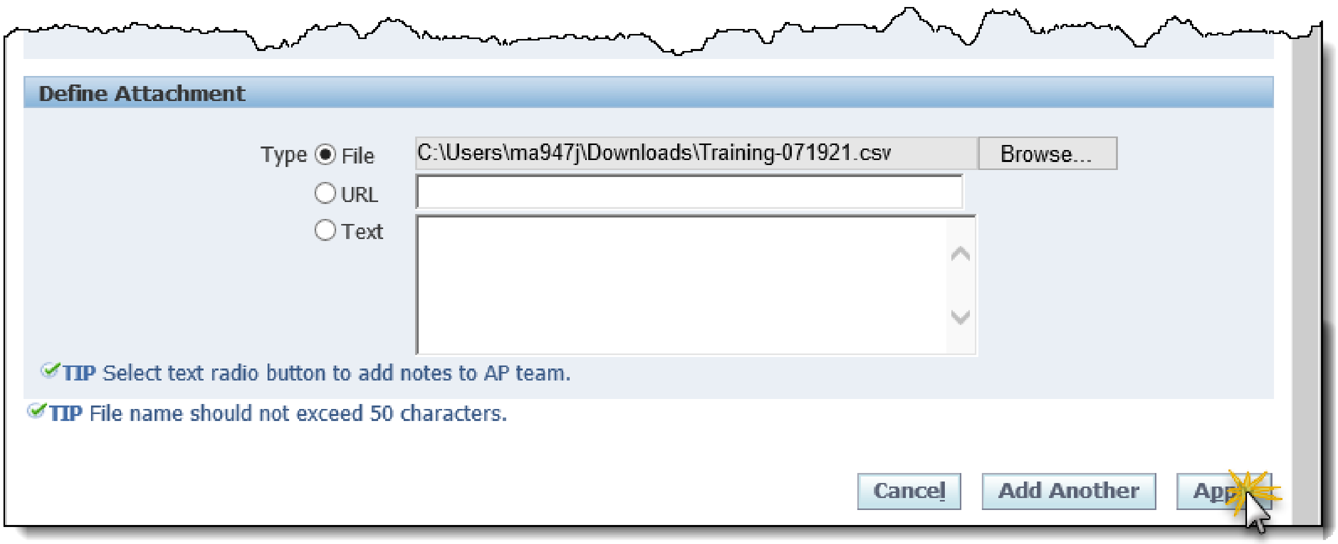
1. Click **Add Attachment** in the **Attachment** section if you wish to add a File, URL, or Text attachment.



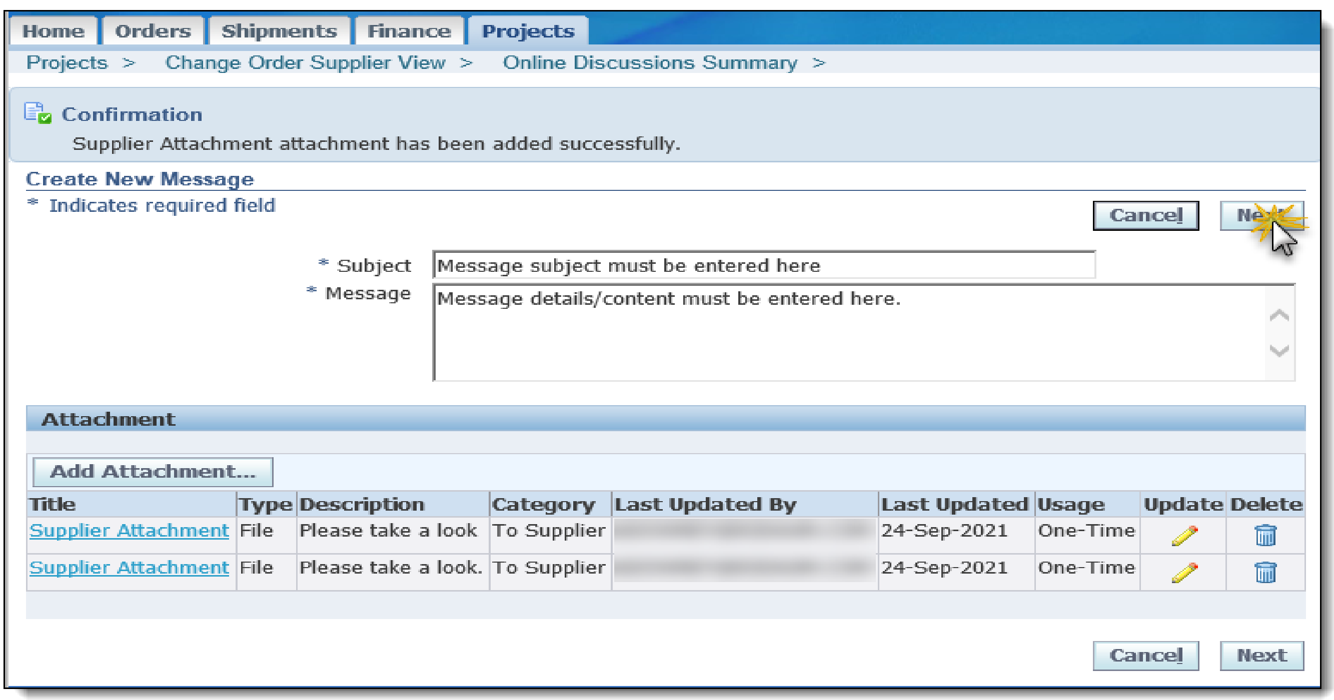

2. The system displays the **Add Attachment** window. Enter **Title**, **Description**. , and **Category** (**To Supplier**) in the **Attachment Summary Information** section.



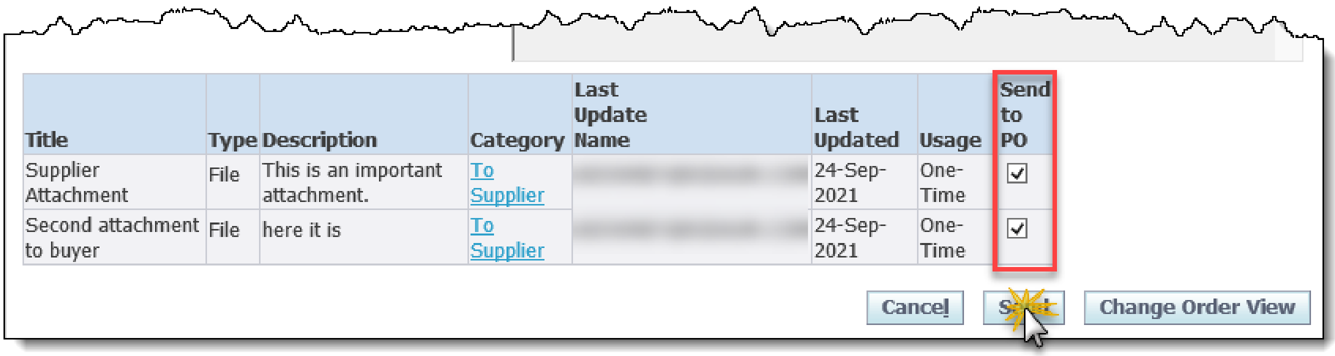
3. In the **Define Attachment** section, select **Type**.
   - For **File**, click **Browse** and select file.
   - For **URL**, enter URL.
   - For **Text**, enter text.
4. Click **Apply** or click **Add Another** (if you have additional attachments to add to the communication).




5. The system returns to the **Create New Message** window with a confirmation that the attachment has been added successfully. You can update the **Subject** and **Message**, and add more attachments, if needed.
6. Click **Next**.



7. The system displays the communication attachments in the lower portion of the window. Click the **Send to PO** checkbox(es) if you are requesting the attachments be added to the purchase order.
8. Click **Send**.

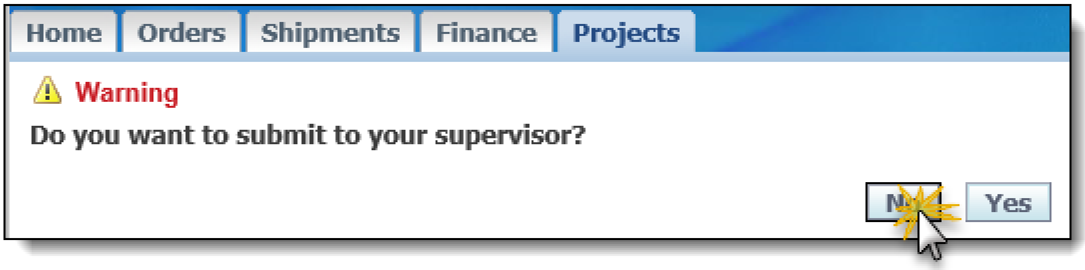



9. The system displays the **Online Discussions Summary** window. To return to the Change Order, click **Change Order Supplier View** in the lower right corner.


## Submit the Changes

1. Click **Save**.
2. Click **Submit to Buyer**.

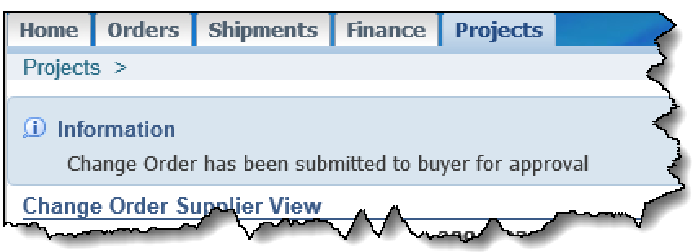
3. The system asks if you'd like to submit the submit this to your supervisor appears. Always click **No**.




**Important!** The Buyer cannot act on the change order until **Submit to Buyer** has been clicked. If the Change Order has a **Status** of **New**, the supplier has not yet submitted it to the buyer.

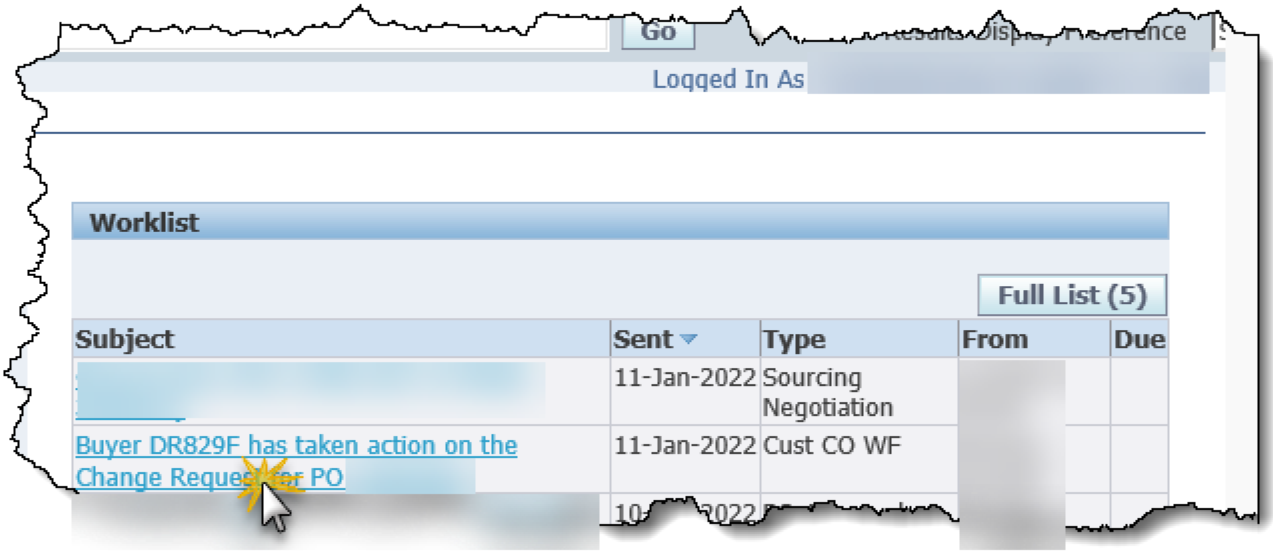
If you navigate away from the CO form, you must click the **Select** radio button for the service line and select **Save** again. Then navigate to the **Submit to Buyer** button.

4. The change order is submitted to the Buyer for approval and the change order status is **IN PROCESS**.

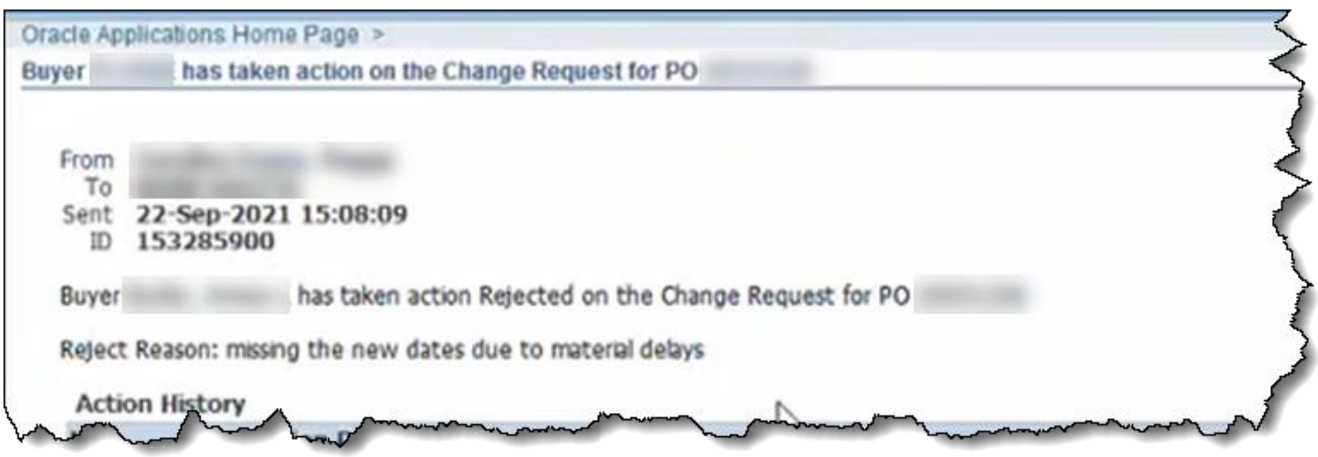


## Approval or Rejection of Change Order

Once the buyer has reviewed the CO and approved or rejected it, you will receive notification of the decision in your **Worklist**. Click the notification to view the Buyer action.



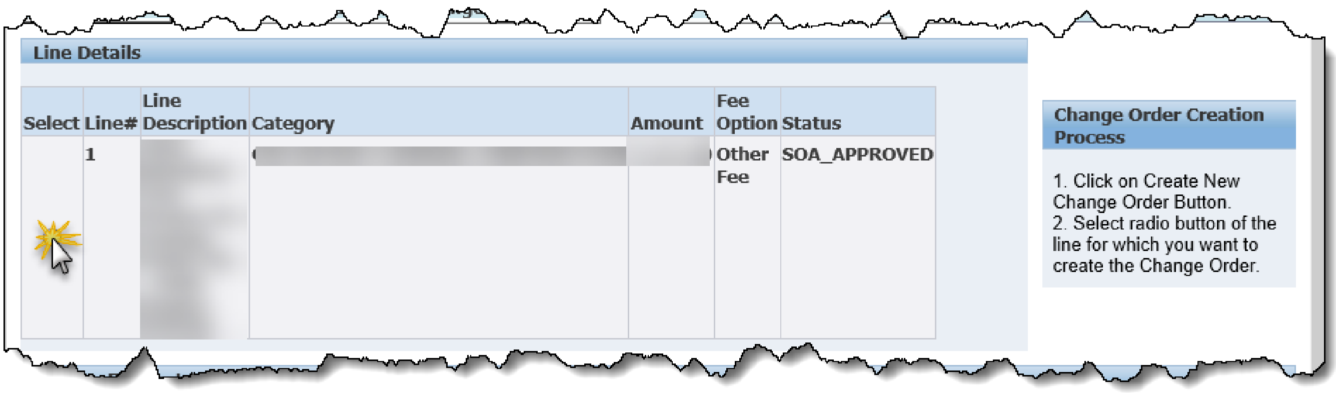

If the CO has been rejected, the rejector's name and rejection reason will be displayed.



## Viewing the Change Order Details

This notification does not display details on the individual items/rows in the change order that the Buyer has Accepted or UnAccepted.

1. Locate the purchase order. See [Search for the Purchase Order](#).
2. Click in the **Create CO** column.
3. The system displays the purchase order. In the **Line Details** section, click the radio button next to the service line that was modified.




4. The system displays the service line items in the **Change Request** section. Review the **Buyer Acceptance?** Value for each item/row.