

Department Manager P2P Change Order Review Procedure

The purpose of this procedure is to provide guidance to campus department managers on review process of P2P change orders.

Background

By design, P2P allows department buyers to modify purchase orders after approval without requiring electronic re-approval of modifications to the purchase orders. The training and procedures we have communicated do require obtaining approvals off-line and attaching them to the change order.

The ability to edit purchase orders after they have been approved increases the risk of unauthorized changes to the original purchase order. To mitigate this risk, it is recommended that departments develop and implement additional department procedures to monitor change order activity. CPBC provides suggestions on this monthly review procedure as a part of departments' general ledger verification.

Steps:

1. Department managers run "PO Status by Buyer" report monthly
2. Review reports for frequency and change orders by each department buyer.

Navigate: eProcurement > Management Reports > PO Status by Buyer

Example result shows Buyer created 6 change orders for the selected period.

UCSF		University of California, San Francisco		PO Status by Buyer							
Department Code: 181403 MED-CAMPUS-XYZ (Including Child Dept Codes)		Buyer: SFP2PJD (Doe, John)		Page: 1		Run Date: 7/9/2009		Run Time: 08:38		User: SF722689 (Lui,Nancy Y.)	
Report Period: 05-01-2009 to 07-31-2009											
				PO Status							
Dept Code	Buyer ID	Name		Open	Pend	Apprvd	Disp	Canc	Closed	Total	Change Ord
181403 MED-CAMPUS-XYZ	SFP2PJD	Doe, John		0	0	0	26	0	207	233	6

3. Run the PO Change Order report to review line by line detail of all changes made to PO.

Navigate: eProcurement > Purchasing Reports > PO Change Order
Change Order "0" = original value Change Order "1" = changed value

Example shows: *Ship To* changed from 2403106A to 30081246

Unit Price changed from \$54 to \$57.6.

Extended Amount calculated by PeopleSoft PO changed from \$270 to \$288.

	Vendor	Buyer	Dept Code	PO ID	Line	Sched	Item	Change Date	Change Order #	Change Made By	Field	Change Value
1	FISHER SCIENTIFIC	Doe, John	181403	0000209759	1	1	35MM GLASS BOTTOM DISH WPOLY		0		Ship To 2403106A	
2	FISHER SCIENTIFIC	Doe, John	181403	0000209759	1	1	35MM GLASS BOTTOM DISH WPOLY	07/09/2009	1	Doe, John	Ship To 30081246	
3	FISHER SCIENTIFIC	Doe, John	181403	0000209759	2	1	MICRO DISH/COL COATED 10/SLV		0		Amount 270	
4	FISHER SCIENTIFIC	Doe, John	181403	0000209759	2	1	MICRO DISH/COL COATED 10/SLV	07/09/2009	1	Doe, John	Amount 288	
5	FISHER SCIENTIFIC	Doe, John	181403	0000209759	2	1	MICRO DISH/COL COATED 10/SLV		0		Price 54	
6	FISHER SCIENTIFIC	Doe, John	181403	0000209759	2	1	MICRO DISH/COL COATED 10/SLV	07/09/2009	1	Doe, John	Price 57.6	
7	FISHER SCIENTIFIC	Doe, John	181403	0000209759	2	1	MICRO DISH/COL COATED 10/SLV		0		Ship To 2403106A	
8	FISHER SCIENTIFIC	Doe, John	181403	0000209759	2	1	MICRO DISH/COL COATED 10/SLV	07/09/2009	1	Doe, John	Ship To 30081246	