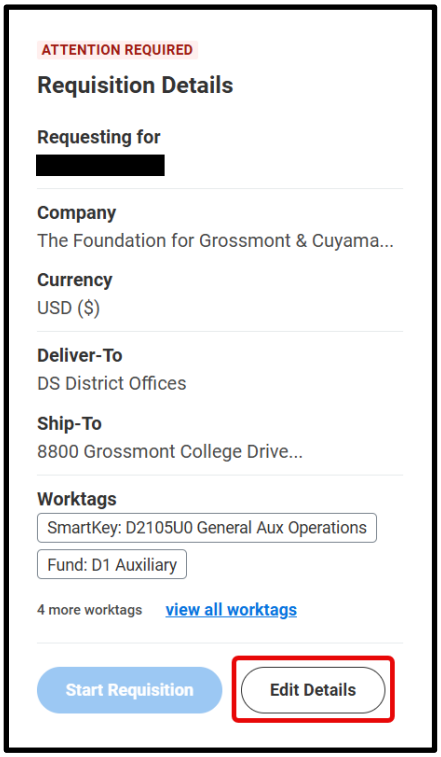
Create Change Order Requisition

This explains to employees and managers how to create Change Order Requisitions for Non-Catalog items from the Requisitions worklet. In addition to creating Requisitions, employees may check on the progress of their requests at any time.

Detailed Instructions

1. Select the **Global Navigation Menu** icon at the top left corner and select **Requisitions** under the **Organizations** category.
2. The **Requisition Details** will be prepopulated. Select the **Edit Details** button to make changes, if needed. NOTE: Company may not default in correctly so please make sure the company is correct.



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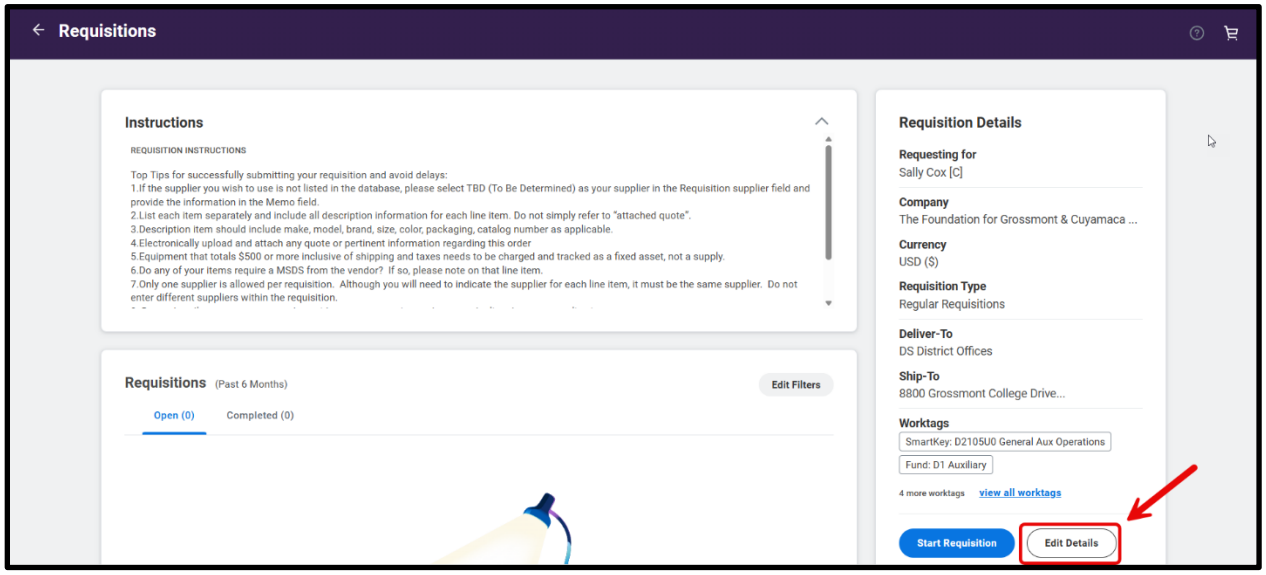
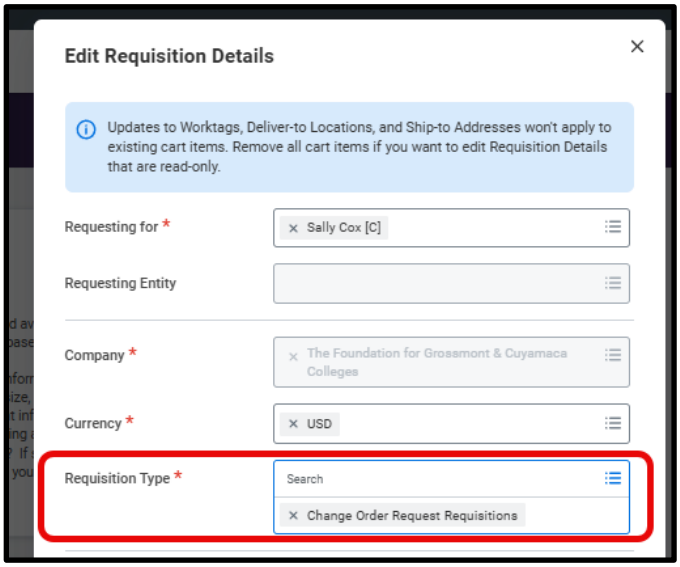
3. Select the **Edit Details** button within the **Requisition Details** section.



4. For **Request Type,** select **Change Order Requisitions**.



Add your Location. This is your building and room number. Add your smartkey.

a. For requisitions for **Goods**, complete the **Request Details** section.

   i. **Supplier Item Identifier**: [Not required] Enter the supplier quote number, if applicable.

   ii. **Supplier**: [Required] - Enter the supplier's name and press enter or select the supplier from the Supplier by Supplier Category list.

iii. **Request Description**: [Required] - Enter a detailed description of the goods being purchased. This field is required.

iv. **Spend Category**: [Required] - Select the spend category using the prompt or search by entering text. This field is required.

v. Enter the **Pricing** details: [Required]

1. **Quantity**: Enter the quantity. This field is required.
2. **Unit of Measure**: Select the unit of measure using the prompt or search by entering text. This field is required.
3. **Price**: Enter the price per unit of measure.

vi. **Subtotal**: Automatically calculated based on pricing details. Shipping/Freight and Additional Charges are added at checkout (Requisition Information- Step 8)

vii. **Memo**: [Required] - Enter additional information about your request. This is an internal memo field.

1. Add the purchase order number to be amended: X26.___

b. For requisitions for **Services**, complete the **Request Details** section.

i. **Request Description**: Enter a detailed description for the request. This field is required.

ii. **Supplier**: Enter the supplier's name and press enter or select the supplier from the Supplier by Supplier Category list.

iii. **Spend Category**: Select the spend category using the prompt or search by entering text. This field is required.

iv. Enter the **Additional Details**:

1. **Start Date:** Date services will begin
2. **End Date:** Date services are to be completed. (
3. **Price**: Enter the extended amount.

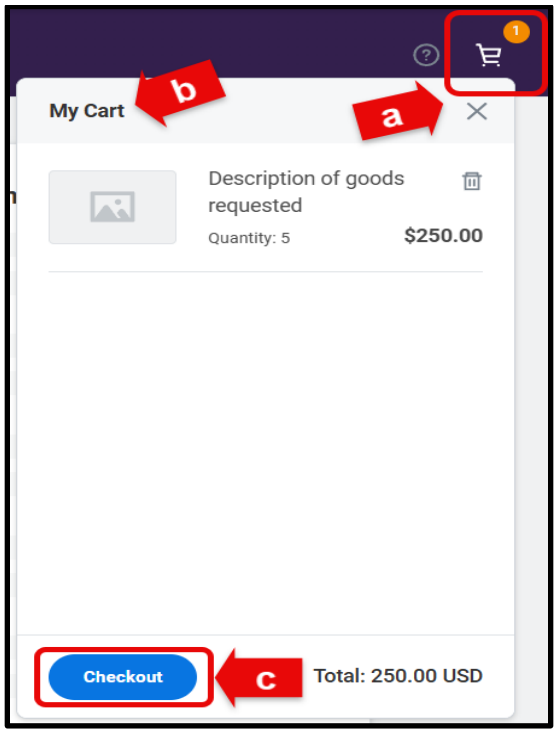
v. **Memo**: Enter additional information about your request. This is an internal memo field.

1. Add the purchase order number to be amended: X26.___
2. Example: Increase contract $10,000 for additional scope of work.
3. Example: Extend contract to end 12/31/25

5. Press the **Add to Cart** button to submit the request.

6. Select the **Continue Shopping** button within the **Requisition Details** section to add another item to your cart.

7. When you have completed shopping and are ready to check out, follow the steps below.

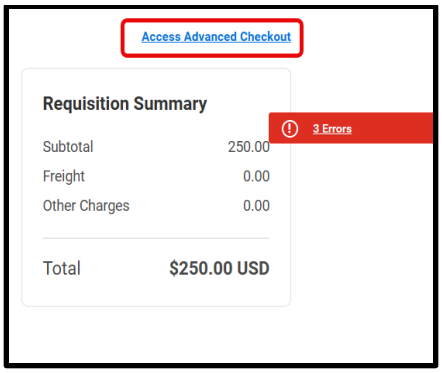


   a. Select the cart icon to **View Cart**.

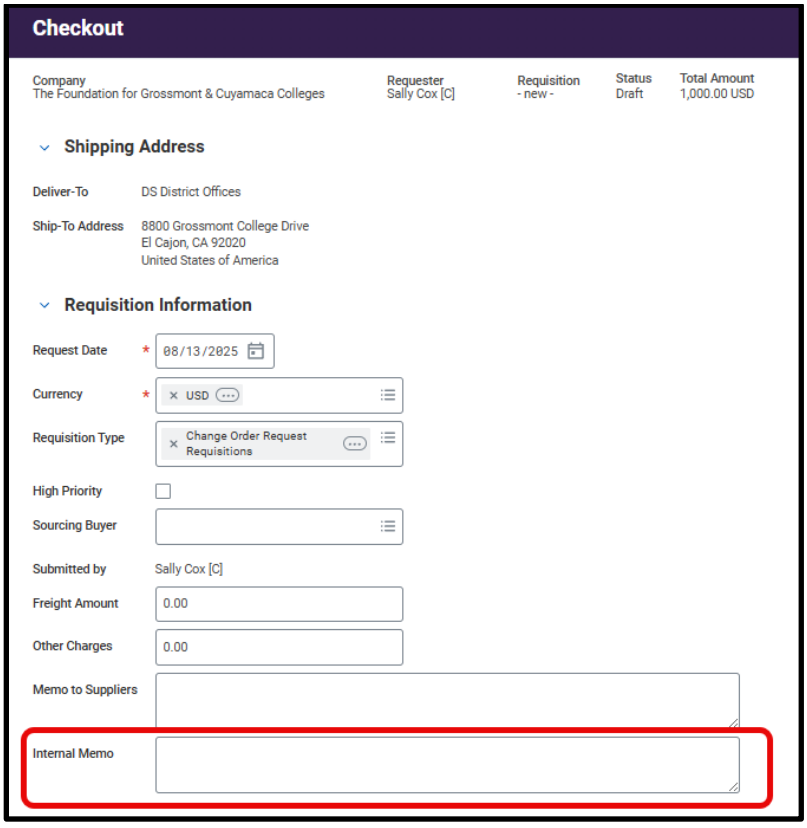
   b. Review the items in **My Cart**.

   c. Select the **Checkout** button

8. On the **Checkout** page, select “Access Advanced Checkout” to review the **Requisition Information** for accuracy. Update, as needed. Note: You may add additional goods or services during checkout by clicking on the plus sign (+) above the goods or services line.



9. Add Sourcing Buyer:
    a. **Heba Almasraf,** for all other grants not mentioned below and F smartkeys
    b. **Mayra Chavez**, for K16 Collaborative Grant
    c. **Sue Fisher**, for Regional Strong Workforce Program, K12 Strong Workforce Program, Regional Collaboration and Coordination Grants, K14 TAP and Pathway Coordinator Grant, Irvine Apprenticeship Grant
10. Enter the purchase order number for the original requisition in the internal memo field.



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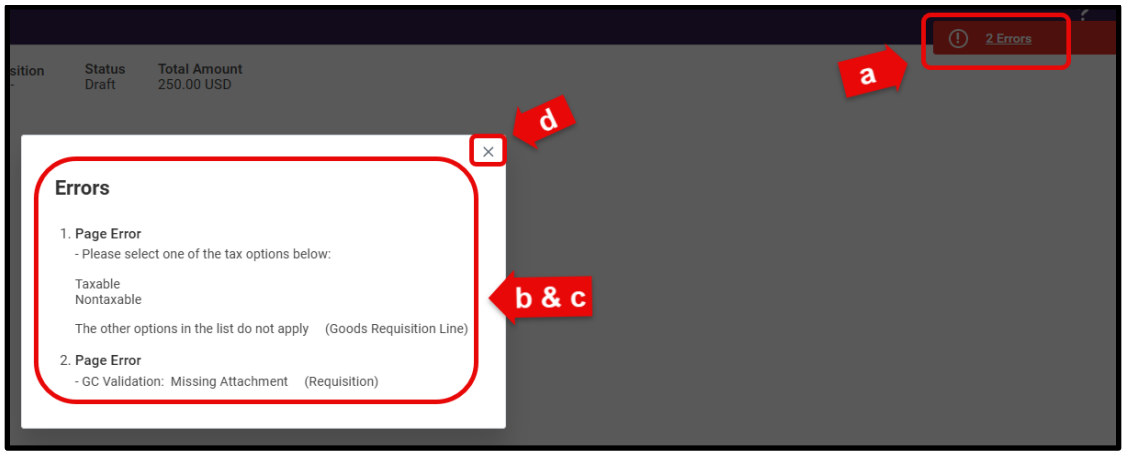
11. An **Error** (and alerts, if applicable) will display.



a. Select the **Error** message to display details.

b. Review the **Error** message(s).

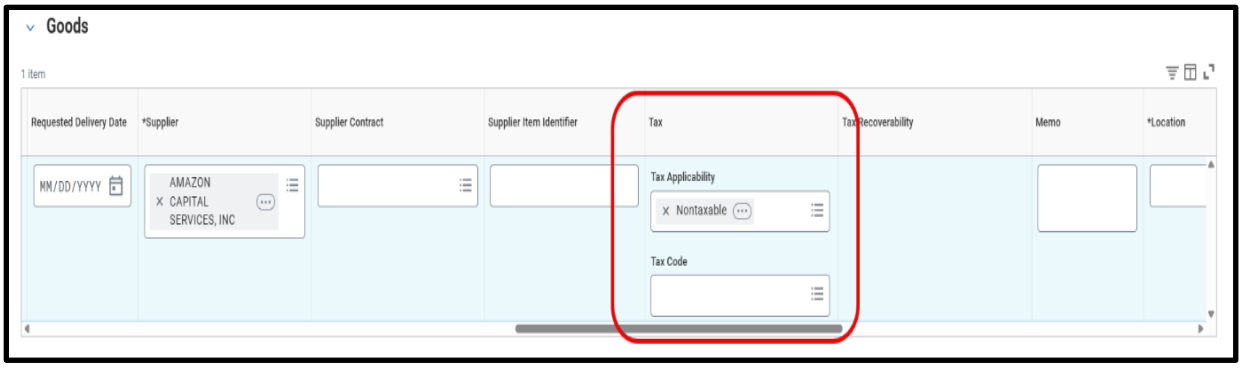
   i. Possible Error Messages:

      1. Add Sourcing Buyer
      2. Missing attachment
      3. Requisition tax
         a. If taxable is chosen, use 8.25% as the tax code
      4. Requisition total amount cannot be $0
      5. Requisition type is required
      6. Supplier is TBD

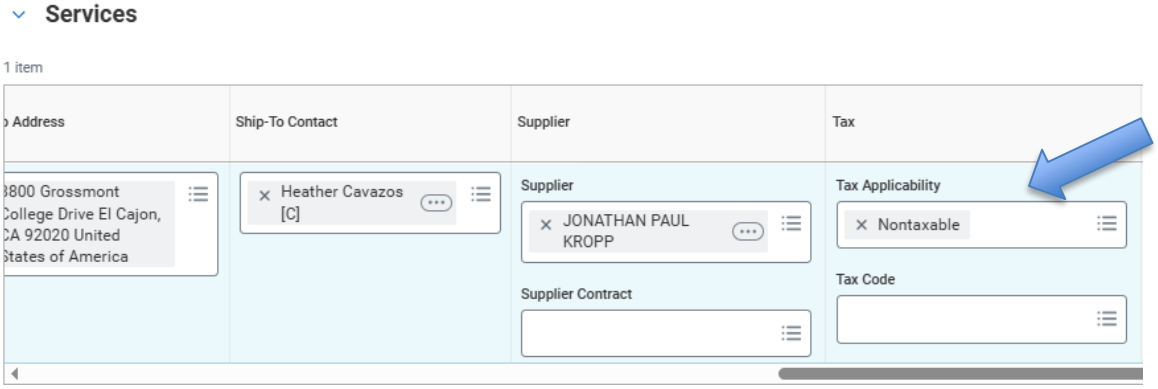
c. Review **Alerts** if applicable.

d. Select the **X** to close the screen.

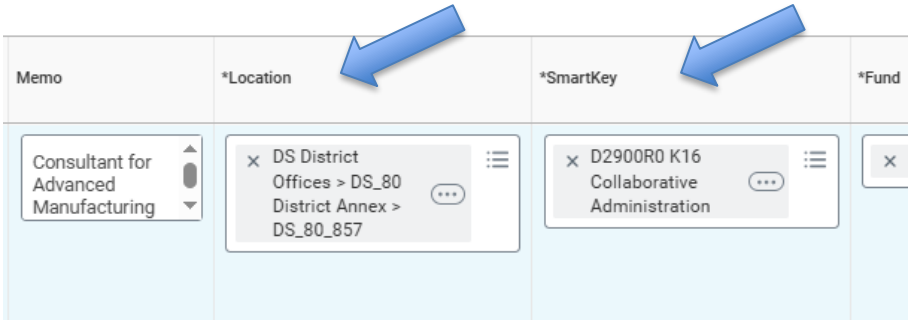
12. From the **Goods** line, move over to the **Tax** field. Select the tax options specified in the error message.



13. From the **Services** line, scroll over to the Tax field. Professional services for consultants is not taxable, select the icon with the 3 lines and choose **Tax Applicabilities**, and then select **Nontaxable**.

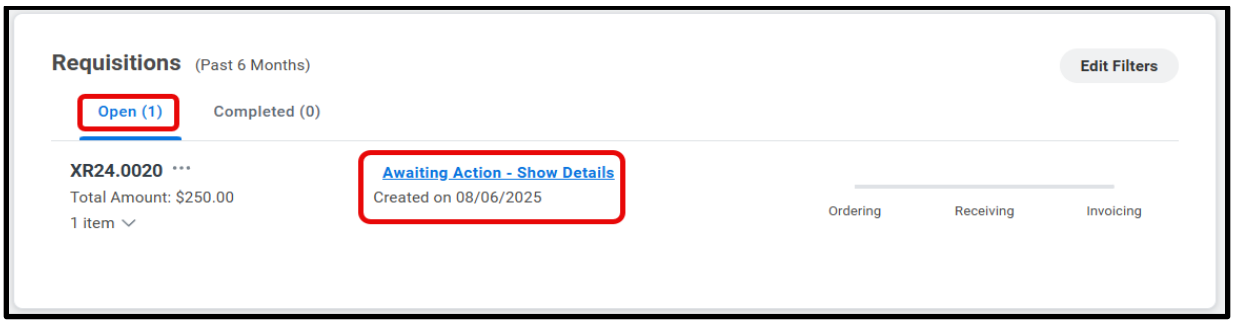


a. Verify Location has your building and office number added in the field. Ensure the smartkey is correct.

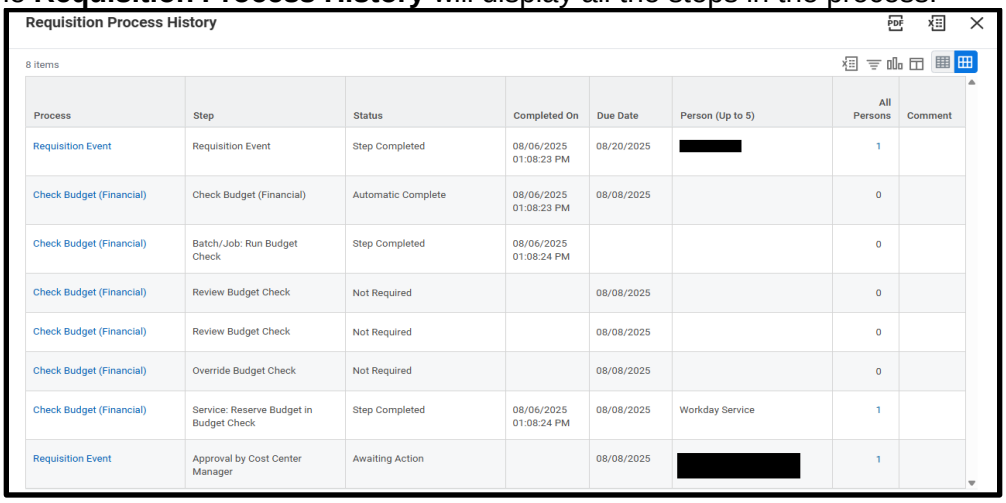


14. Select the **Submit** button when complete. Other options include: **Save for Later**, **Continue Shopping** as well as **Edit Requisition Defaults**, **Edit Address**, and **Cancel** from the more button.

15. Upon submission, you will be redirected to the **Requisitions** worklet. The newly created requisition will appear under **Requisitions** on the **Open** tab. Select the **Awaiting Action - Show Details** hyperlink to view the **Requisition Process History**.

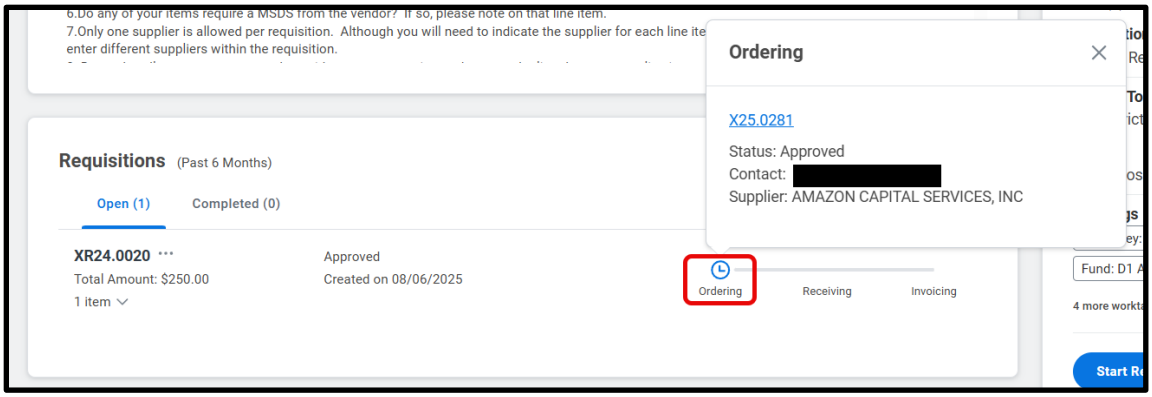


16. The **Requisition Process History** will display all the steps in the process.



Process	Step	Status	Completed On	Due Date	Person (Up to 5)	All Persons	Comment
Requisition Event	Requisition Event	Step Completed	08/06/2025 01:08:23 PM	08/20/2025	[redacted]	1	
Check Budget (Financial)	Check Budget (Financial)	Automatic Complete	08/06/2025 01:08:23 PM	08/08/2025		0	
Check Budget (Financial)	Batch/Job: Run Budget Check	Step Completed	08/06/2025 01:08:24 PM			0	
Check Budget (Financial)	Review Budget Check	Not Required		08/08/2025		0	
Check Budget (Financial)	Review Budget Check	Not Required		08/08/2025		0	
Check Budget (Financial)	Override Budget Check	Not Required		08/08/2025		0	
Check Budget (Financial)	Service: Reserve Budget in Budget Check	Step Completed	08/06/2025 01:08:24 PM	08/08/2025	Workday Service	1	
Requisition Event	Approval by Cost Center Manager	Awaiting Action		08/08/2025	[redacted]	1	

17. Approval of the request will be displayed on the **Requisitions** worklet along with its progress. **Ordering** means the PO is approved but not issued. **Ordered** means the PO has been issued.



Have Questions?

For information please contact the sourcing buyer:

- Heba Almasraf, for all other grants not mentioned below and F smartkeys. Heba.almasraf@gcccd.edu
- Mayra Chavez, for K16 Collaborative Grant. Mayra.chavez@gcccd.edu
- Sue Fisher, for Regional Strong Workforce Program, K12 Strong Workforce Program, Regional Collaboration and Coordination Grants, K14 TAP and Pathway Coordinator Grant, Irvine Apprenticeship Grant. Sue.fisher@gcccd.edu