

Processing Change Orders In McGill MarketPlace

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Processing Change Orders in MMP

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Introduction

What is a Change Order?

It is sometimes necessary to make changes to orders after they have been submitted. Orders can be changed by creating a PO revision in McGill MarketPlace. Once completed, the change request is sent through an approval workflow so that it can be approved.

When is a Change Order necessary?

Changes to an existing purchase order is necessary when any of the categories listed below must be modified.

<input type="radio"/> Product Description
<input type="radio"/> Catalog No (<i>if applicable</i>)
<input type="radio"/> Quantity
<input type="radio"/> Unit Price
<input type="radio"/> Size/Packaging or Unit of Measure
<input type="radio"/> Vendor Information (notes)
<input type="radio"/> FOAPALS
<input type="radio"/> Adding an item

Can Change Orders be processed for all order types?

Change orders cannot be processed for **Punchout** suppliers. To add to your order, please submit a new requisition order through MMP.

If the order is no longer required or modifications are needed, first receive the item (s) then contact the supplier's customer support team to request a return.

The supplier will provide a **Return Merchandise Authorization** number which will be used to return the product(s). Once the items are received by the supplier, a credit note will be issued against the original purchase order.

Can Supplier Information be changed?

Changes to supplier information such as name changes, address, or currency changes **cannot** be modified. The current purchase order must be canceled, and a new requisition must be placed with the correct information.

For further information regarding supplier's changes, please complete a [Support Request](#) or fill in the [Reactivation/Change Request form](#) located on the MMP homepage.

How can I change only the FOAPAL?

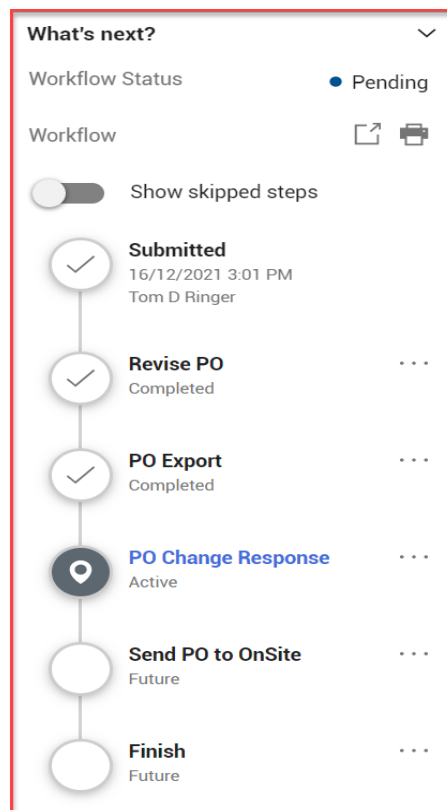
If changes to a FOAPAL are needed, they can be processed by going to the [FOAPAL Modifications](#) section of this document.

What Happens Once I've Completed the Change Order in MMP?

1. The PO moves through an approval workflow where a Procurement Administrator and / or Buyer, will review, approve, or reject the changes (as applicable).
2. Once approved, the PO then moves to **Revise PO**, **PO Export** and then **PO Change Response** where it will remain pending until all financial approvals have been recorded in Minerva by the FFM/delegates, PI, and FA.

****Procurement Services is not authorized to approve this workflow step****

3. Once FFM/delegates, PI, and FA approve the change order in Minerva/Banner, the **PO Change Response** approval workflow box will be completed and will move on to the PO distribution box (if applicable).
4. The change order is then complete.

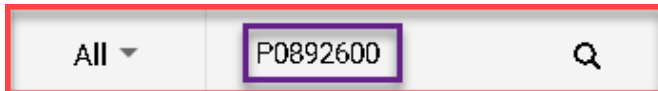


Email notifications are not generated and sent back to users. It is incumbent on them to follow up on the status of their request.

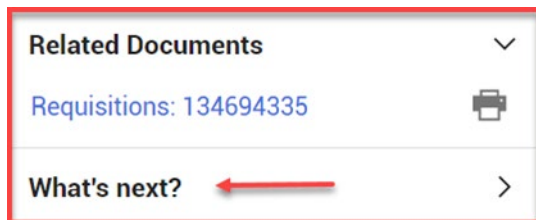
What is the status of my change order?

To inquire on the status of a pending change order, users should first identify where in the workflow process the request is pending.

Step 1. Go to MMP and enter the PO number in the search engine.

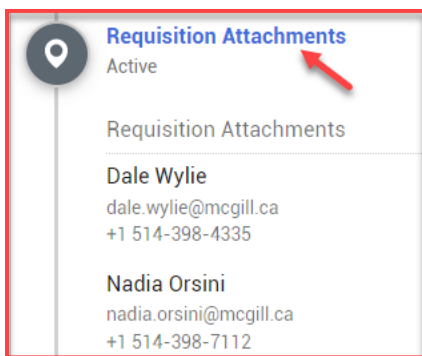


Step 2. Go to the right side of the document to **What's Next** and click on the right arrow.



Step 3. Identify the status of the order by referring to the reference guide provided in [What Happens Once I've Completed my Change Order in MMP?](#)

There are various workflow steps within MMP. To view a drop-down list of approvers assigned to a specific pending workflow, click on the **workflow name**.



Exception

Although listed as approvers, Procurement Services cannot approve the **PO Change Response** workflow. To view a list of assigned approvers, go to [Minerva](#) and view the document approval history. *(Please ensure to login first)*

Tracking your change order in Minerva

How to view my change order status

Step 1. To see a list of pending change orders issued by you, please do the following:

- Log in to **Minerva**
- Go to **Finance** menu
- Select **Approve Document**
- Select **Submit Query**
- Select the **History** link to view the approval/disapproval details of the document. Approvals required as well as Approvals recorded will be displayed.

Step 2. To view the approval history of a particular PO change request (**either issued by you or someone else in your unit**), please do the following:

- Log in to **Minerva**
- Go to **Finance** menu
- Select **View Document**
- Select Purchase Order in **Choose Type** drop-down menu, enter the PO number in the **Document Number** box
- Select the **Approval History** button to view the approval/disapproval details of the document. Approvals required as well as Approvals recorded will be displayed.

How to Disapprove a Pending Purchase Order Change Request

During the approval process, you can disapprove a PO change request submitted by you. Please do the following:

- Log in to **Minerva**
- Go to **Finance** menu
- Select **Approve Document**
- Select the option **All Documents** which you may approve
- Select **Submit Query**
- click the Disapproved link on the right-hand side and follow the instructions. You will receive two e-mails notifying you about the disapproval of your PO change request.
- Once the document is disapproved, please submit a JIRA ticket to advise Procurement Services of the disapproval as there are additional administrative steps required to completely cancel the request and/or allow new changes to the PO once again.

For more details, please visit Financial Services' Guide to Financial Management website: [How to use the Minerva Approve Documents Menu](#)

McGill Managed Catalog Orders

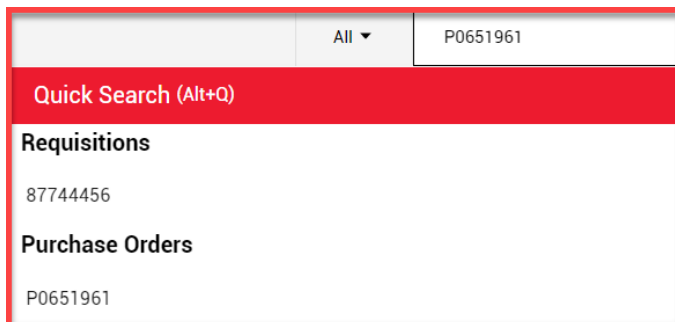
McGill Managed Catalog orders are associated to university negotiated contracts. As such, providing supporting documentation is not required.

Should the modification be necessary due to a change in the contract date, it must be reflected on the revised purchase order. For further instructions, please refer to [Modifying Delivery Dates](#).


Modifying Line Item(s)

Modifications to existing line items can only be processed for **Quantity** amounts and **FOAPAL Modifications**. For information on how to modify a FOAPAL go to [FOAPAL Modification](#) section of this document.


Step 1. Enter the PO number in the search engine.

The screenshot shows a search interface with a dropdown menu set to 'All' and a search box containing 'P0651961'. Below the search bar, there is a red header for 'Quick Search (Alt+Q)'. Under this header, there are two sections: 'Requisitions' with the value '87744456' and 'Purchase Orders' with the value 'P0651961'. The entire search area is highlighted with a red border.

Step 2. Go to **Summary** section in the top Menu bar.


- Scroll down to **Lines** Section
- Then **Item Details**
- Click on the **Edit** icon  located at the far right of the page.
- Modify the quantity as needed.
- Save

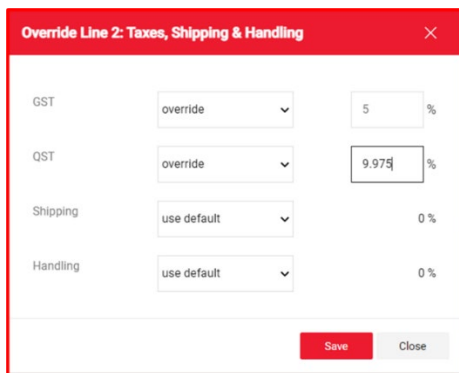
Step 3. Go to **Vendor Information**

- Click on the **Edit** icon 
- Enter the reason for the change order in **Note to Vendor** and **Save**

When modifying a quantity, you must update the taxes as applicable on the PO. If no taxes are applied skip step 4.

Step 4. Go to Taxes, Shipping & Handling

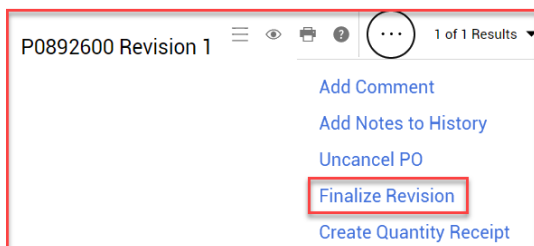
- Click on the **Edit** icon 
- Override the amounts with the applicable taxes and **SAVE**
- GST: Override the existing dollar amount to 5
- QST: Override the existing dollar amount to 9.975
- **SAVE**
- The taxes will be re-calculated



Do not modify Shipping or Handling. If either is required, they can be added to the purchase order as a separate non-catalog product line-item entry. To inquire on the steps, go to [Creating a Line Item](#)

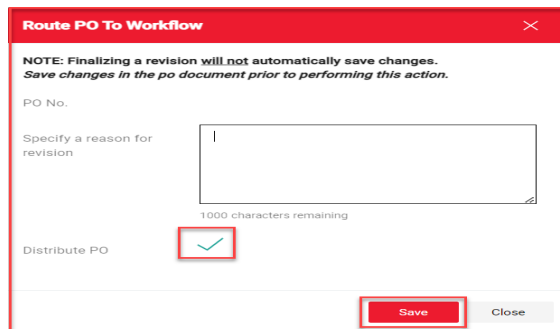
Step 5. Once all the modifications have been completed, Finalize the Revision.

- Scroll up to the PO number and select the three dots at the right of the page then finalize your revisions



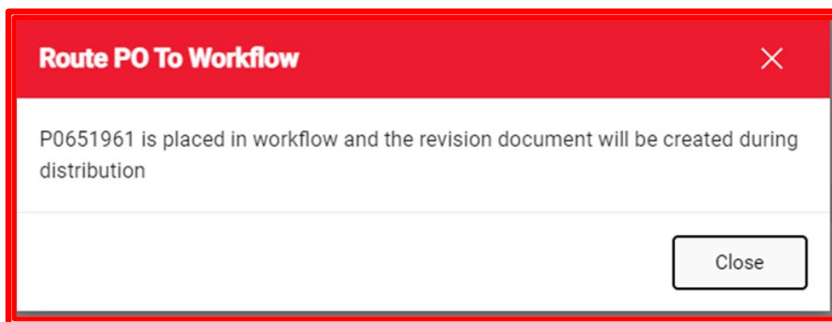
Step 5. (Continued)

- Select **Finalize Revision** and **GO**
- The revised purchase order must be re-distributed to the supplier, therefore leave the box checked ✓
- **SAVE** and **CLOSE**



The dialog box titled "Route PO To Workflow" has a red header bar with a close button (X). Below the header, a note states: "NOTE: Finalizing a revision will not automatically save changes. Save changes in the po document prior to performing this action." The form contains a "PO No." field, a "Specify a reason for revision" text area with a "1000 characters remaining" indicator, and a "Distribute PO" checkbox which is checked and highlighted with a red box. At the bottom, there are "Save" and "Close" buttons, with the "Save" button also highlighted with a red box.

The PO will move through financial approvals. Once all approvals have been recorded, a revised document will be generated in MMP and distributed to the supplier as required.



The confirmation dialog box titled "Route PO To Workflow" has a red header bar with a close button (X). The main text area contains the message: "P0651961 is placed in workflow and the revision document will be created during distribution". At the bottom right, there is a "Close" button.

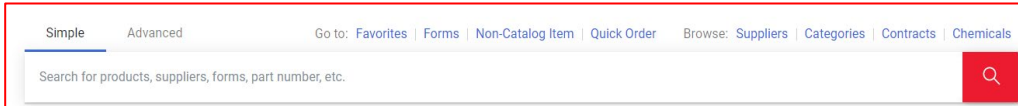
**This dialog box will appear once you have clicked on SAVE in the route To Workflow dialog box.*

To inquire on the status of the change order, please refer to [What is the status of my Change Order?](#)

Creating New Line Item(s)

Step 1. Go to the MMP Homepage 

Step 2. Search for product item(s) in the search engine bar using one of the following methods



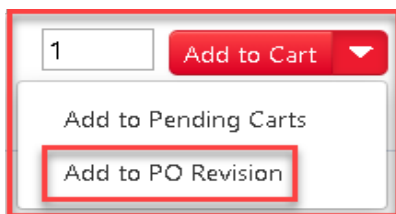
- ❖ Contract Number – e.g. (C0001961A)
- ❖ Product Description
- ❖ Product Code
- ❖ Supplier Name

In order to obtain a complete list of products or services offered by the University McGill Managed Catalog, search by contract number (C0001961A) ¹

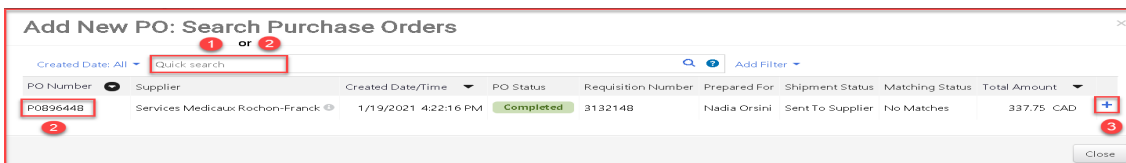
Step 3. Search for the product item

Product Description	Product Code	Supplier Name	Contract Number
office visit	00100-GP	Stella Andonatos	C0001961A

- Indicate the quantity then select the down arrow next to **Add to Cart**.
- Select **Add to PO Revision**



- Search for the purchase order number in the **Quick Search** field box or from the browsing list then click on the **+** icon to add the line to the purchase order.




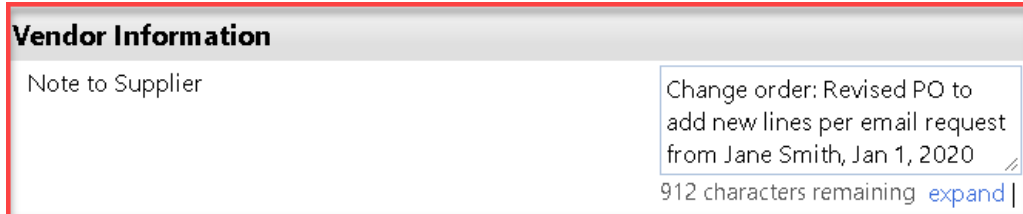
¹ Searching by supplier name may result by having multiple contracts

Step 3. (Continued)

- To add multiple products, repeat the above steps
- Once all items have been added to the pending purchase order, scroll back up to the top of the page and search for the purchase order number again.


Step 4. Go to **Vendor Information**

- Click on the **Edit** icon 
- Enter the reason for the change order in **Note to Vendor** and **Save**

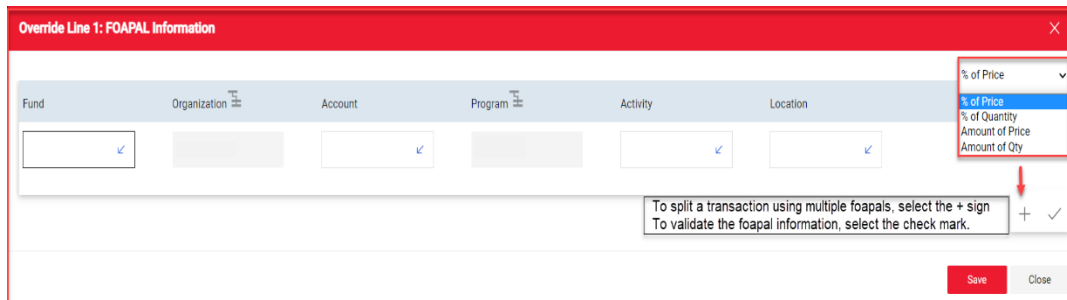


Newly added lines will not automatically include the FOAPAL information or the taxes. This must be inserted manually.


Step 5. Go to the **new line item number (e.g. 2, 3, 4 etc....)**

- Go to the far right of the line and click on the three dots 
- Select **FOAPAL Information**
- Add the **FOAPAL** and ensure to validate the information by clicking on the check mark ✓ before saving.
- **SAVE**

To add multiple FOAPAL lines, click on the + sign, then select from the drop-down menu.



Step 6. Go to the **new line-item number (e.g., 2, 3, 4 etc....)**

- Go to the far right of the line and click on the three dots 
- Select **Taxes, Shipping and Handling**
- Enter the taxes according to what is already indicated on the purchase order.
- If the supplier doesn't charge taxes, skip this step.

Override Line 1: Taxes, Shipping & Handling

GST	override	5	CAD
QST	override	9.975	CAD
Shipping	use default	0 %	
Handling	use default	0 %	

Save **Close**

- **SAVE**

Step 7. Once all the modifications have been completed, **Finalize the Revision**.

- Scroll up to the PO number and select the three dots at the right of the page then finalize your revisions

P0892600 Revision 1

1 of 1 Results

- Add Comment
- Add Notes to History
- Uncancel PO
- Finalize Revision**
- Create Quantity Receipt

- Select **Finalize Revision** and **GO**
- The revised purchase order must be re-distributed to the supplier, therefore leave the box checked ✓
- **SAVE** and **CLOSE**

Route PO To Workflow

NOTE: Finalizing a revision **will not** automatically save changes.
Save changes in the po document prior to performing this action.

PO No.

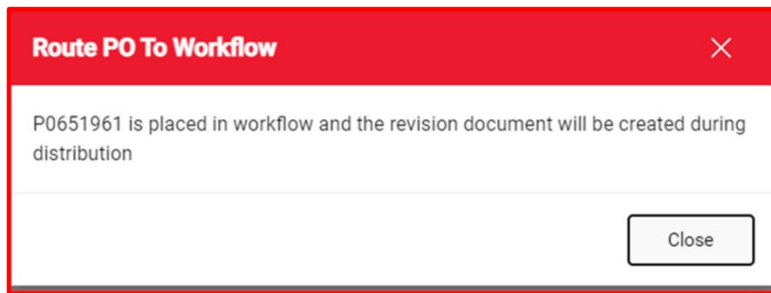
Specify a reason for revision

1000 characters remaining

Distribute PO ☒

Save **Close**

The PO will move through financial approvals. Once all approvals have been recorded, a revised document will be generated in MMP and distributed to the supplier as required.



**This dialog box will appear once you have clicked on SAVE in the Route PO TO Workflow dialog box.*

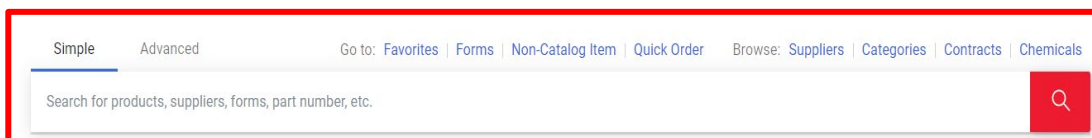
To inquire on the status of the change order, please refer to [What is the status of my Change Order?](#)

Adding and Cancelling Line Item(s)

If the purchase order has only one-line item, first add a new line, then cancel the original line. Failure to follow this order will result in the purchase order being completely cancelled without the possibility of adding a new McGill Managed catalog item.

Step 1. Go to the MMP Homepage

Step 2. Search for product item(s) in the search engine bar using one of the following methods



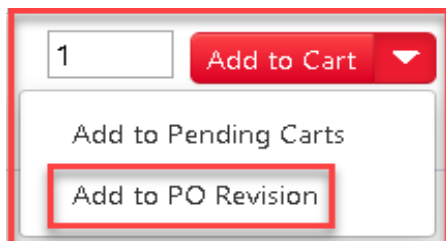
- ❖ Contract Number – e.g. (C0001961A)
- ❖ Product Description
- ❖ Product Code
- ❖ Supplier Name

In order to obtain a complete list of products or services offered by the University McGill Managed Catalog, search by contract number (C0001961A) ²

Step 3. Search for the product item

Product Description	Product Code	Supplier Name	Contract Number
office visit	00100-GP	Stella Andonatos	C0001961A

- Indicate the quantity then select the down arrow next to **Add to Cart**.
- Select **Add to PO Revision**



² Searching by supplier name may result by having multiple contracts

Step 3. (Continued)

- Search for the purchase order number in the **Quick Search** field box or from the browsing list then click on the **+** icon to add the line to the purchase order.

Add New PO: Search Purchase Orders

Created Date: All Quick search

PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	Prepared For	Shipment Status	Matching Status	Total Amount
P0896448	Services Medicaux Rochon-Franck	1/19/2021 4:22:16 PM	Completed	3132148	Nadia Orsini	Sent To Supplier	No Matches	337.75 CAD

Close

- To add multiple products, repeat the above steps
- Once all items have been added to the pending purchase order, scroll back up to the top of the page and search for the purchase order number again.

Step 4. Go to **Vendor Information**

- Click on the **Edit** icon
- Enter the reason for the change order in **Note to Supplier** and **Save**

Vendor Information

Note to Supplier

Change order: Revised PO to add new lines per email request from Jane Smith, Jan 1, 2020

912 characters remaining expand

Step 5. Adding **Taxes Shipping and Handling**

When adding new lines to a purchase order, the taxes must be updated according to the selection previously indicated on the above PO lines. E.g., GST & QST, or GST only, or none.
If the PO does not apply taxes, skip this step and go to Step 6.

- Go to the newly added line, then to **Item Details**
- Click on the **Edit** icon
- Check off the box **Taxable** then **Save**
- Go to GST (override) and QST (override)
- GST: Select Override then enter 5 in the box
- QST: Select Override then enter 9.975 in the box
- **Save**
- The taxes will be re-calculated

Step 5. Adding Taxes Shipping and Handling (Continued)


Override Line 2: Taxes, Shipping & Handling


GST	override	5	%
QST	override	9.975	%
Shipping	use default	0	%
Handling	use default	0	%

Save **Close**

Do not modify Shipping or Handling. If either are required, they can be added to the purchase order as a separate product line-item entry. To inquire on the steps, go to [Creating New Line Item\(s\)](#)


Step 6. Adding a FOAPAL(s)

Go to the line-item you would like to add the FOAPAL information and click on the 3 dots  and then select FOAPAL information.

2 Test 123 EA 1.00 Qty: 1 EA **1**  **2** **FOAPAL Information**


Contract: no value Internal Note: no value
Taxable: ✓ Internal note will not be sent to vendor
Capital Expense: ✗ Vendor Note: no value
Commodity Code: no value Vendor note will be sent to vendor
PO Clauses: no clause

Override
FOAPAL Information
Taxes, Shipping & Handling
Add to Favorites
Add To Active Cart
Add to Pending Carts
Add to PO Revision

- Enter the **FOAPAL** (Fund (1), Account (2), Activity (3) and Location (4)) and then Validate by clicking on the check mark (5) .

Override Line 2: FOAPAL Information

Fund	Organization	Account	Program	Activity	Location
Search 1 ✓	No Value	Search 2 ✓	No Value	Search 3 ✓	Search 4 ✓

5 

6 **Save** **Close**

- **SAVE** (6)

Step 6.1. Splitting a FOAPAL

Fund	Organization	Account	Program	Activity	Location	% of Price
159395	00356	700002	4106	000000	000000	75 (0.75 CAD)
159395	00356	700002	4106	000000	000000	Split by FOAPAL

To split a transaction using multiple FOAPAL's select the + sign
To validate the FOAPAL information, select the check mark

Split Total 100% (1.00 CAD)

Save Close

To add multiple FOAPAL lines, click on the + sign, then select from the drop-down menu all depending how you would like to split the FOAPAL(s).

- If using Amount of Price, ensure line-item totals match the overall total amount
- If using % of Price or % of Qty, ensure the % total is equal to 100 %
- **SAVE**

Step 7. Scroll down to the lines that need to be cancelled,

- Select them one at a time.
- Go back up to the Lines header section where the selected cancelled items are grouped and numbered.
- Select the drop-down arrow, then **Cancel Selected PO Lines**

Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1	190244 499-501 Pine (Unplanned)		YR	500.00	Qty: 1 YR	500.00

Cancel Selected PO Lines

Add to Favorites

Add to Active Cart

Add to Pending Carts

Add to PO Revision

- Enter a reason for the cancellation

Cancel Selected PO Lines

Specify a reason for canceling the PO line.

Indicate a reason for the cancellation.

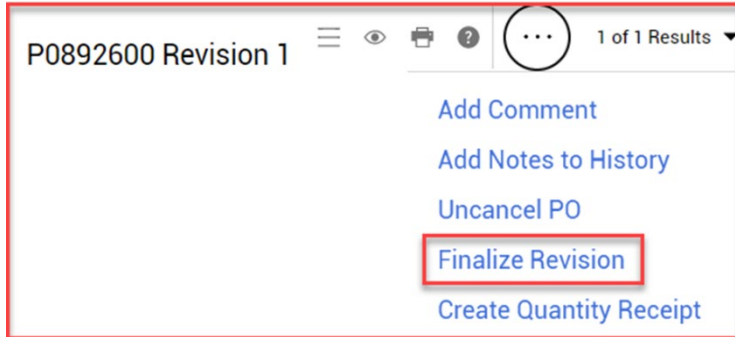
1000 characters remaining expand | clear

Cancel Selected PO Lines Close

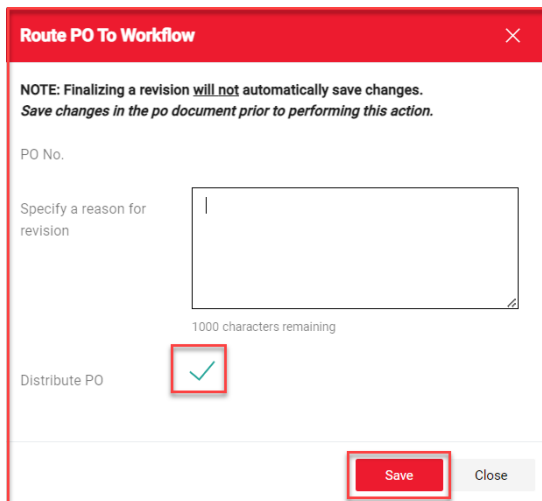
Step 8. Finalize the Revision

Once all the modifications have been completed, **Finalize the Revision**.

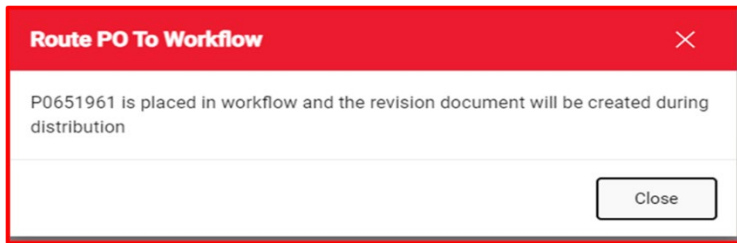
- Scroll up to the PO number and select the three dots at the right of the page then finalize your revision.



- Select **Finalize Revision**
- The revised purchase order must be re-distributed to the supplier, therefore leave the box checked ✓
- **SAVE** and **CLOSE**

A screenshot of a dialog box titled 'Route PO To Workflow' with a red header bar and a close button (X). Inside the dialog, there is a note: 'NOTE: Finalizing a revision will not automatically save changes. Save changes in the po document prior to performing this action.' Below the note, there is a label 'PO No.' followed by a text input field. Below that is a label 'Specify a reason for revision' followed by a larger text area with a character count '1000 characters remaining'. Below the text area is a checkbox labeled 'Distribute PO' which is checked with a green checkmark and is highlighted with a red rectangular box. At the bottom right, there are two buttons: 'Save' (highlighted with a red rectangular box) and 'Close'.

The PO will move through financial approvals. Once all approvals have been recorded, a revised document will be generated in MMP and distributed to the supplier (as required).



**This dialog box will appear once you have clicked on SAVE in the Route PO To Workflow dialog box.*

To inquire on the status of the change order, please refer to [What is the status of my Change Order?](#)


Canceling Existing Line Item(s)

If the purchase order has only one-line item, first add a new line, then cancel the original line. Failure to follow this order will result in the purchase order being completely cancelled without the possibility of adding a new McGill Managed catalog item. Refer to [Adding and Canceling Lines Item\(s\)](#) section of this document.

Step 1. Enter the PO number in the search engine.

The screenshot shows a search bar with a dropdown menu set to 'All' and the search term 'P0942426'. Below the search bar, a red header reads 'Quick Search (Alt+Q)'. The search results are categorized under 'Requisitions' and 'Purchase Orders'. Under 'Requisitions', the number '143641693' is listed. Under 'Purchase Orders', the number 'P0942426' is listed.

Step 2. Go to **Vendor Information**

- Click on the **Edit** icon 
- Enter the reason for the change order in **Note to Vendor** and **Save**

Step 3. Scroll down to the **Lines Section**

- Select the line item(s) you want to cancel and click the box
- Once selected, go back up to the **Lines header section** where the cancelled items are grouped
- Select the drop-down arrow, then **Cancel Selected PO Lines**

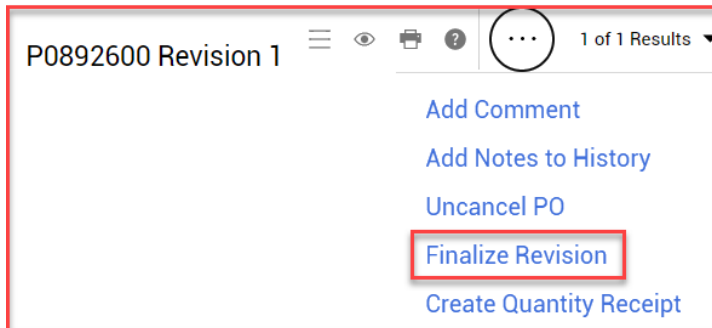
The screenshot shows a table titled '2 Lines'. The table has columns: Status, Item, Catalog No., Size/Packaging, Unit Price, Quantity, and Ext. Price. The first line item is selected, indicated by a blue box around the '1' in the Status column. A dropdown menu is open, showing options: 'Cancel Selected PO Lines', 'Add to Favorites', 'Add To Active Cart', 'Add to Pending Carts', and 'Add to PO Revision'. The 'Cancel Selected PO Lines' option is highlighted.

- Enter a reason for the cancellation

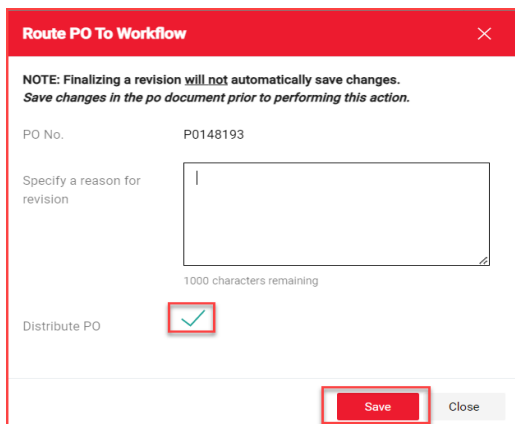
The screenshot shows a dialog box titled 'Cancel Selected PO Lines'. It contains a text area with the placeholder text 'Indicate a reason for the cancellation'. Below the text area, it says '1000 characters remaining' with 'expand' and 'clear' links. At the bottom, there are two buttons: 'Cancel Selected PO Lines' and 'Close'.

Step 4. Once all the modifications have been completed, **Finalize the Revision**.

- Scroll up to the PO number and select the three dots at the right of the page then **Finalize your Revision**.

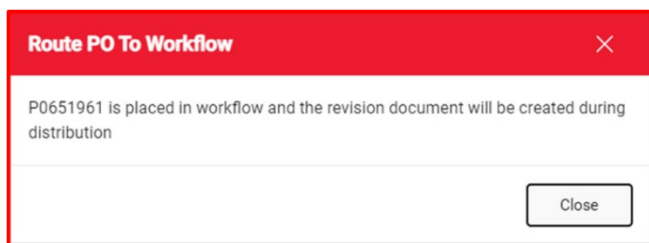


- Select **Finalize Revision** and **GO**
- The revised purchase order must be re-distributed to the supplier, therefore leave the box checked ☒
- **SAVE** and **CLOSE**



Step 5. Once all the modifications have been completed, **Finalize the Revision**.

The PO will move through financial approvals. Once all approvals have been recorded, a revised document will be generated in MMP and distributed to the supplier if required.



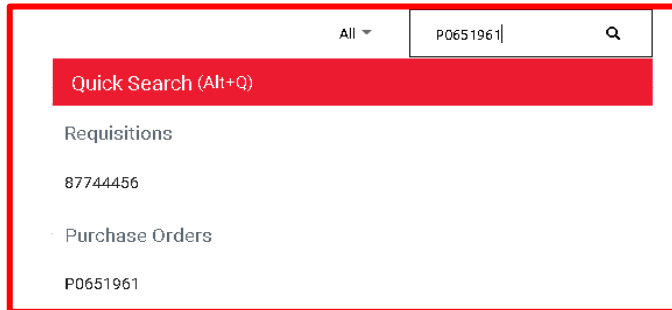
**This dialog box will appear once you have clicked on SAVE in the Route PO To Workflow dialog box.*

To inquire on the status of the change order, please refer to [What is the status of my Change Order?](#)

Non-Catalog Orders


Modifying Line Item(s)

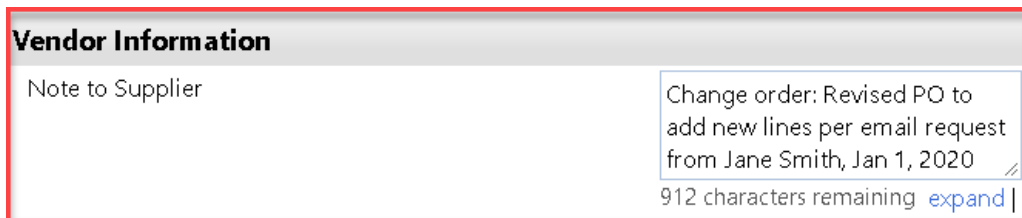
Step 1. Enter the PO number in the search engine



The screenshot shows a search bar with a dropdown menu set to 'All'. The search input field contains 'P0651961' and a magnifying glass icon. Below the search bar, a red banner reads 'Quick Search (Alt+Q)'. The search results are listed under the heading 'Requisitions' and include the requisition number '87744456'. Below this, under the heading 'Purchase Orders', the purchase order number 'P0651961' is displayed.

Step 2. Go to **Vendor Information**

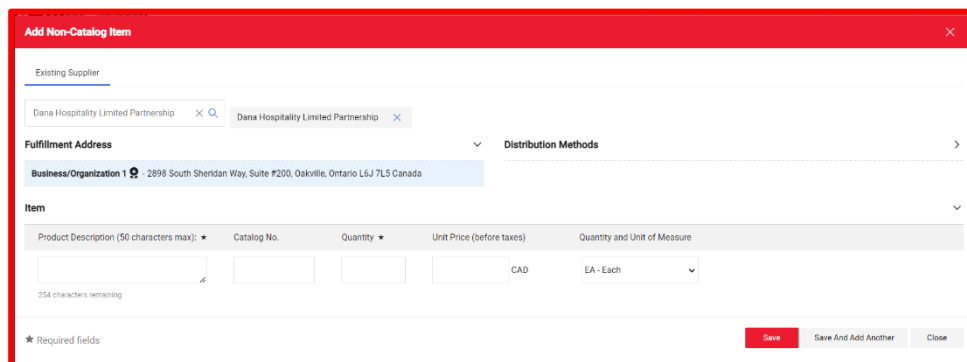
- Click on the **Edit** icon 
- Enter the reason for the change order in **Note to Vendor** and **Save**



The screenshot shows the 'Vendor Information' form. The 'Note to Supplier' field is active, and a text box contains the message: 'Change order: Revised PO to add new lines per email request from Jane Smith, Jan 1, 2020'. Below the text box, it indicates '912 characters remaining' and a blue 'expand' link.

Step 3. Go to **Summary** section in the top Menu bar

- Scroll down to **Lines** Section
- Then **Item Details**
- Click on the description that is hyperlinked
- Modify the as needed (Product Description, Catalog No., Qty, Unit Price, UoM)
- **Save**




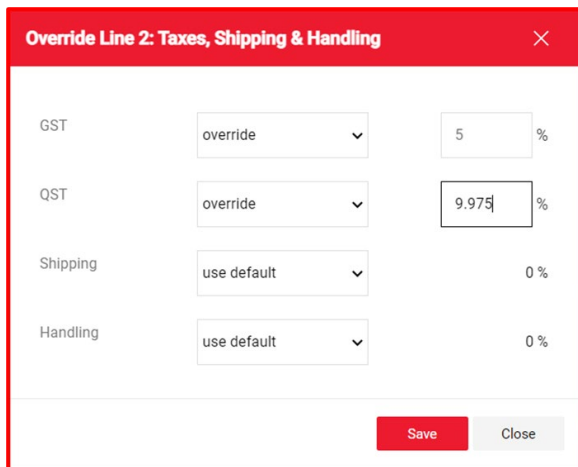
The screenshot shows the 'Add Non-Catalog Item' form. The 'Existing Supplier' section is expanded, showing 'Dana Hospitality Limited Partnership' with a search icon and a close button. The 'Fulfillment Address' section is expanded, showing 'Business/Organization 1' with the address '2898 South Sheridan Way, Suite #200, Oakville, Ontario L6J 7L5 Canada'. The 'Distribution Methods' section is collapsed. The 'Item' section is expanded, showing a table with columns: 'Product Description (50 characters max):', 'Catalog No.', 'Quantity', 'Unit Price (before taxes)', and 'Quantity and Unit of Measure'. The 'Product Description' field is active, showing '254 characters remaining'. The 'Unit Price' field is set to 'CAD'. The 'Quantity and Unit of Measure' dropdown is set to 'EA - Each'. At the bottom, there are buttons for 'Save', 'Save And Add Another', and 'Close'. A star icon and the text 'Required fields' are also present.

If you are modifying a quantity or unit price, you must update the taxes located in the **Taxes Shipping & Handling** Section. If there are no applicable taxes, then skip to Step. 5.

If you are modifying a FOAPAL, go the **FOAPAL Information** Section and follow the instructions listed in the [FOAPAL Modifications](#) Section of this document.

Step. 4. Taxes Shipping & Handling

- Click on the **Edit** icon 
- Override the amounts with the applicable taxes and **Save**
- Go to GST (overridden) and QST (overridden)
- GST: Override the existing \$ amount to 5
- QST: Override the existing \$ amount to 9.975
- Save
- The taxes will be re-calculated

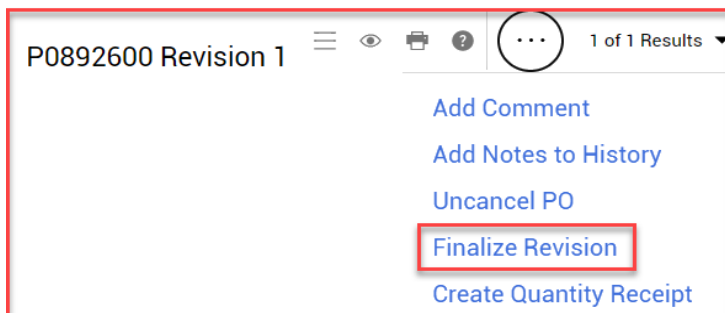



Override Line 2: Taxes, Shipping & Handling		
GST	override	5 %
QST	override	9.975 %
Shipping	use default	0 %
Handling	use default	0 %
<div>Save Close</div>		

Do not modify Shipping or Handling. If either is required, they can be added to the purchase order as a separate product line-item entry. To inquire on the steps, go to [Creating New Line Item\(s\)](#)

Step 5. Once all the modifications have been completed, Finalize the Revision.

- Scroll up to the PO number and select the three dots at the right of the page then finalize your revision



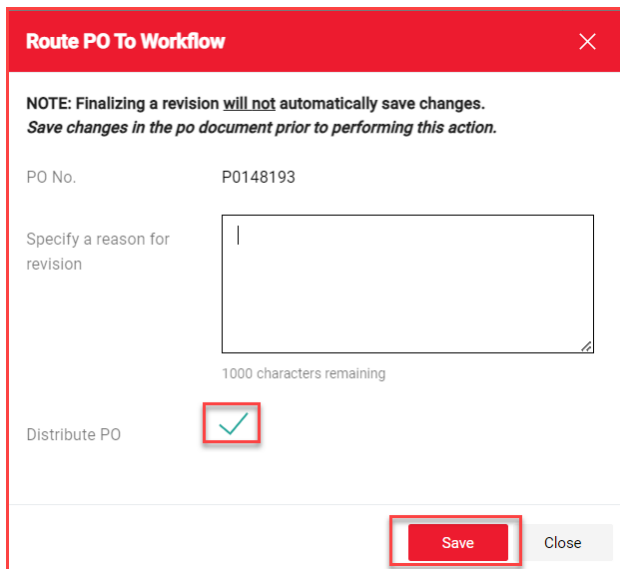
P0892600 Revision 1  1 of 1 Results

- Add Comment
- Add Notes to History
- Uncancel PO
- Finalize Revision**
- Create Quantity Receipt

- Select **Finalize Revision** and **GO**

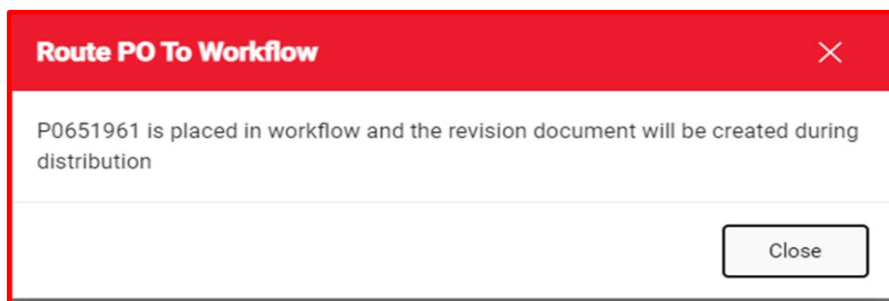
Step 5. Once all the modifications have been completed, **Finalize the Revision (Continued)**.

- The revised purchase order must be re-distributed to the supplier, therefore leave the box checked ✓
- **SAVE** and **CLOSE**



The dialog box titled "Route PO To Workflow" has a red header bar with a close button (X). Below the header, a note states: "NOTE: Finalizing a revision will not automatically save changes. Save changes in the po document prior to performing this action." The form contains a "PO No." field with the value "P0148193". Below this is a text area labeled "Specify a reason for revision" with a placeholder character and a "1000 characters remaining" indicator. A "Distribute PO" checkbox is checked and highlighted with a red box. At the bottom, there are "Save" and "Close" buttons, with the "Save" button also highlighted by a red box.

The PO will move through financial approvals. Once all approvals have been recorded, a revised document will be generated in MMP and distributed to the supplier if required.



This confirmation dialog box, titled "Route PO To Workflow", has a red header bar with a close button (X). The main text area contains the message: "P0651961 is placed in workflow and the revision document will be created during distribution". At the bottom right, there is a "Close" button.

**This dialog box will appear once you have clicked on SAVE in the Route PO To Workflow dialog box.*

To inquire on the status of the change order, please refer to [What is the status of my Change Order?](#)

Creating New Line Item(s)

To modify a purchase order by adding new line items, follow the steps indicated below.

Step 1. Enter the PO number in the search engine.

- Select the purchase order number.



Search bar: All P0651961

Quick Search (Alt+Q)

Requisitions


87744456

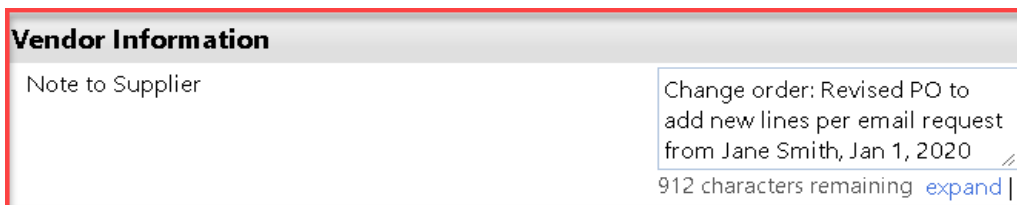
Purchase Orders

P0651961

Step 2. Go to **Summary** section in the top Menu bar

Step 3. Go to **Vendor Information**

- Click on the **Edit** icon 
- Enter the reason for the change order in **Note to Vendor** and **Save**



Vendor Information

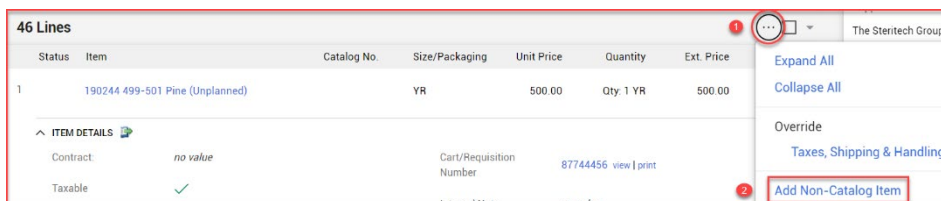
Note to Supplier

Change order: Revised PO to add new lines per email request from Jane Smith, Jan 1, 2020

912 characters remaining [expand](#)

Step 4. Scroll down to **Lines** Section

- Click on the three dots at the right side of the page
- Select **Add Non-Catalog Item**
- Enter the required information according to the supplier quotation.
 - Product Description
 - Catalog No.
 - Quantity
 - Unit Price
 - Unit of Measure – most often EA
 - **Save or Save and add another**




46 Lines

Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1	190244 499-501 Pine (Unplanned)		YR	500.00	Qty: 1 YR	500.00

ITEM DETAILS

Contract: no value

Taxable: 

Cart/Requisition Number: 87744456 view | print

Internal Note: no value

Expand All

Collapse All

Override


Taxes, Shipping & Handling

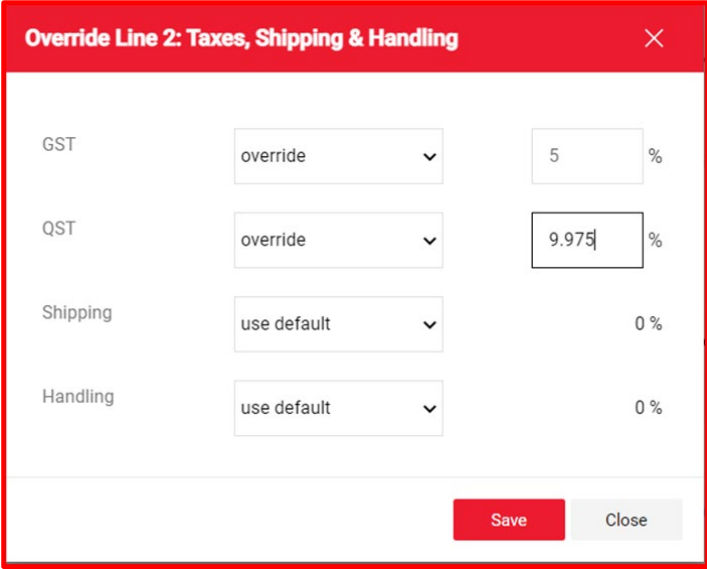
Add Non-Catalog Item

Step 5. Adding **Taxes Shipping and Handling**

When adding new lines to a purchase order, the taxes must be updated according to the selection previously indicated on the above lines of the PO. E.g., GST & QST, or GST only, or none.

If the PO does not apply taxes, then skip this step and go to Step 6.


- Go to the newly added line, then to **Item Details**
- Click on the **Edit** icon 
- Check off the box **Taxable** ☒ then **Save**
- Go to GST (override) and QST (override)
- GST: Select Override then enter 5 in the box
- QST: Select Override then enter 9.975 in the box
- Save
- The taxes will be re-calculated



Override Line 2: Taxes, Shipping & Handling		
GST	override	5 %
QST	override	9.975 %
Shipping	use default	0 %
Handling	use default	0 %
<div>Save Close</div>		

Do not modify Shipping or Handling. If either are required, they can be added to the purchase order as a separate product line-item entry. To inquire on the steps, go to [Creating a Line Item](#)

Step 6. Adding a **FOAPAL(s)**

Go to the line-item you would like to add the FOAPAL information and click on the 3 dots  and then select FOAPAL information.

- Enter the **FOAPAL** (Fund (1), Account (2), Activity (3) and Location (4)) and then Validate by clicking on the check mark (5) ✓.

- **SAVE** (6)

Step 6.1. Splitting a FOAPAL

To add multiple FOAPAL lines, click on the + sign, then select from the drop-down menu how you would like to split the FOAPAL(s).

- If using Amount of Price, ensure line-item totals match the overall total amount

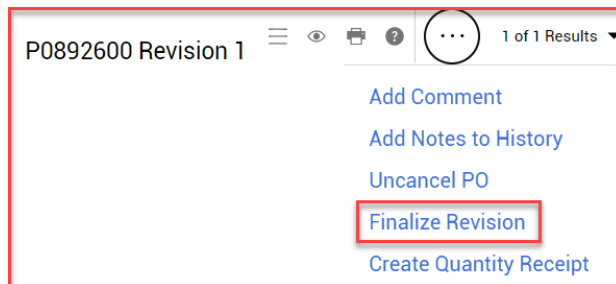
Step 6.1. **Splitting a FOAPAL** (Continued)

- If using % of Price or % of Qty, ensure the % total is equal to 100 %
- **SAVE**

Step 7. Finalize the Revision

Once all the modifications have been completed, **Finalize the Revision**.

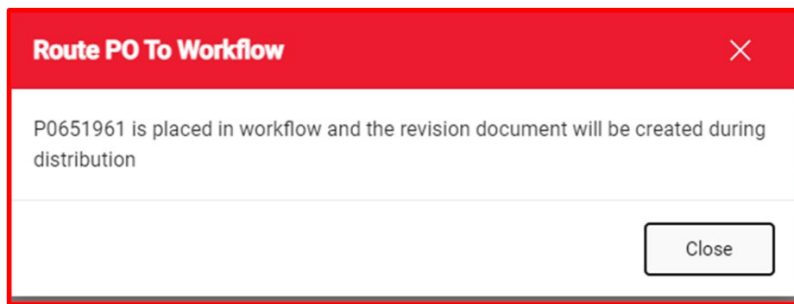
- Scroll up to the PO number and select the three dots at the right of the page then finalize your revision



- Select **Finalize Revision**
- The revised purchase order must be re-distributed to the supplier, therefore leave the box checked ✓
- **SAVE** and **CLOSE**

A screenshot of a dialog box titled 'Route PO To Workflow'. It contains a note: 'NOTE: Finalizing a revision will not automatically save changes. Save changes in the po document prior to performing this action.' Below the note, the 'PO No.' is 'P0148193'. There is a text area for 'Specify a reason for revision' with a '1000 characters remaining' indicator. A checkbox labeled 'Distribute PO' is checked, and the checkbox itself is highlighted with a red box. At the bottom, there are 'Save' and 'Close' buttons, with the 'Save' button highlighted by a red box.

The PO will move through financial approvals. Once all approvals have been recorded, a revised document will be generated in MMP and distributed to the supplier (if required).



**This dialog box will appear once you have clicked on SAVE in the Route PO To Workflow dialog box.*

To inquire on the status of the change order, please refer to [What is the status of my Change Order?](#)

Adding and Cancelling Line Item(s)

Adding a Line Item(s)

To modify a purchase order by adding a new line item(s), follow the steps indicated below.

Step 1. Enter the PO number in the search engine

- Select the purchase order number

Quick Search (Alt+Q)

Requisitions

87744456

Purchase Orders

P0651961

Step 2. **Go to Summary** section in the top Menu bar

Step 3. Go to **Vendor Information**

- Click on the **Edit** icon
- Enter the reason for the change order in **Note to Vendor** and **Save**

Vendor Information

Note to Supplier

Change order: Revised PO to add new lines per email request from Jane Smith, Jan 1, 2020

912 characters remaining [expand](#) | [collapse](#)

Step 4. Scroll down to **Lines** Section

- Click on the three dots at the right side of the page
- Select **Add Non-Catalog Item**
- Enter the required information according to the supplier quotation
- Product Description
- Catalog No.
- Quantity
- Unit Price
- Unit of Measure – most often EA
- **Save or Save and add another**

46 Lines

Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1	190244 499-501 Pine (Unplanned)		YR	500.00	Qty: 1 YR	500.00

ITEM DETAILS

Contract: no value

Taxable: ☒

Cart/Requisition Number: 87744456 view | print

Internal Note: no value

Expand All

Collapse All

Override


Taxes, Shipping & Handling

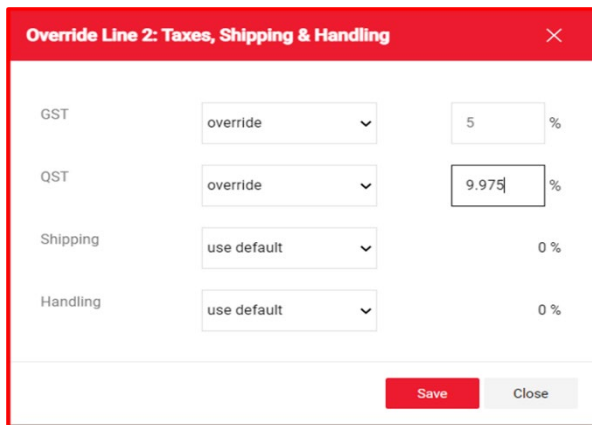
Add Non-Catalog Item

Step 5. Adding **Taxes Shipping and Handling**

When adding new lines to a purchase order, the taxes must be updated according to the selection previously indicated on the above lines of the PO. E.g., GST & QST, or GST only, or none.


If the PO does not apply taxes, then skip this step and go to Step 6.

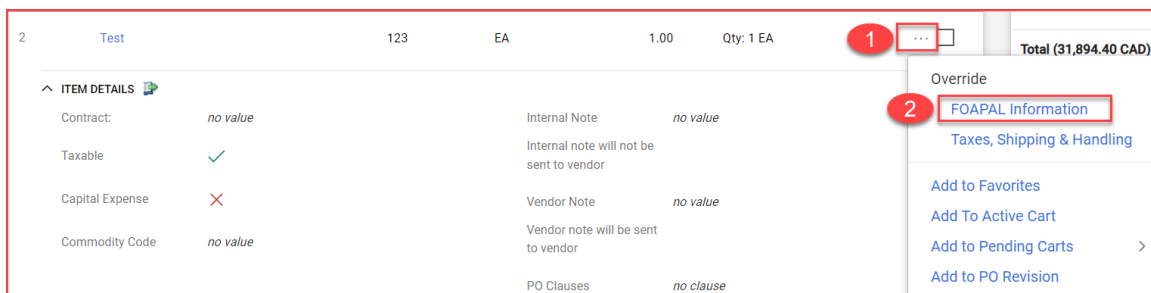
- Go to the newly added line, then to **Item Details**
- Click on the **Edit** icon 
- Check off the box **Taxable then Save**
- Go to GST (override) and QST (override)
- GST: Select Override then enter 5 in the box
- QST: Select Override then enter 9.975 in the box
- Save
- The taxes will be re-calculated



Override Line 2: Taxes, Shipping & Handling		
GST	override	5 %
QST	override	9.975 %
Shipping	use default	0 %
Handling	use default	0 %
<div>Save Close</div>		

Step 6. Adding a **FOAPAL(s)**

Go to the line-item you would like to add the FOAPAL information and click on the 3 dots  and then select FOAPAL information.



2	Test	123	EA	1.00	Qty: 1 EA	Total (31,894.40 CAD)
<div>ITEM DETAILS</div> <div><div>Contract: no value</div><div>Taxable: <input checked="" type="checkbox"/></div><div>Capital Expense: <input type="checkbox"/></div><div>Commodity Code: no value</div></div> <div><div>Internal Note: no value</div><div>Internal note will not be sent to vendor</div><div>Vendor Note: no value</div><div>Vendor note will be sent to vendor</div><div>PO Clauses: no clause</div></div>						

1

...

2

FOAPAL Information

Taxes, Shipping & Handling

Add to Favorites

Add To Active Cart

Add to Pending Carts

Add to PO Revision

Step 6. Adding a FOAPAL(s).. (Continued)

Enter the **FOAPAL** information (Fund (1), Account (2), Activity (3) and Location (4)) and then **Validate** by clicking on the check mark (5) ✓.

- **SAVE** (6)

To add multiple line items, you will need to repeat the process above.

Step 6.1. Splitting a FOAPAL

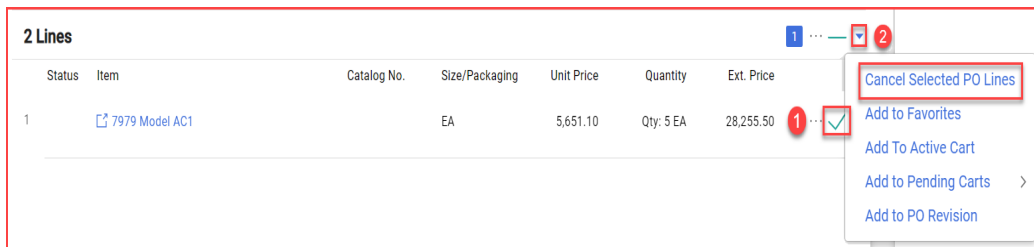
To add multiple FOAPAL lines, click on the + sign, then select from the drop-down menu how you would like to split the FOAPAL(s).

- If using Amount of Price, ensure line-item totals match the overall total amount
- If using % of Price or % of Qty, ensure the % total is equal to 100 %
- **SAVE**

Cancelling a line item(s)

Step 1. Scroll down to the line item(s) that need to be cancelled,

- Select them one at a time
- Go back up to the Lines header section where the selected cancelled items are grouped and numbered
- Select the drop-down arrow, then **Cancel Selected PO Lines**



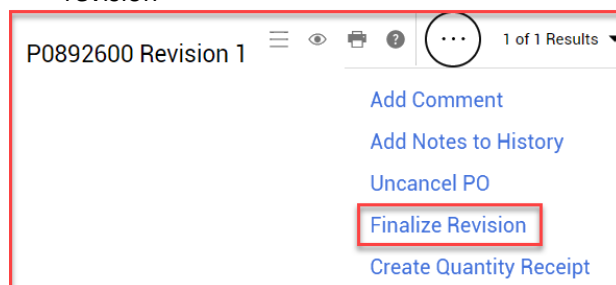
- Enter a reason for the cancellation

The dialog box titled 'Cancel Selected PO Lines' has a red header. It contains a text input field with the placeholder 'Indicate a reason for the cancellation'. Below the input field, it says '1000 characters remaining expand | clear'. At the bottom, there are two buttons: 'Cancel Selected PO Lines' (red) and 'Close' (grey).

Step 2. **Finalize the Revision**

Once all the modifications have been completed, **Finalize the Revision**.

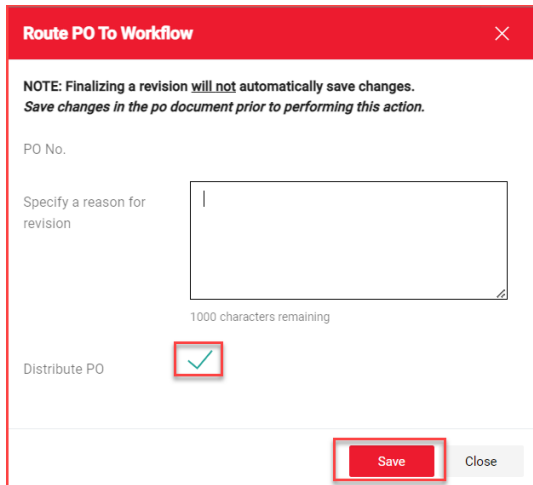
- Scroll up to the PO number and select the three dots at the right of the page then finalize your revision



- Select **Finalize Revision**

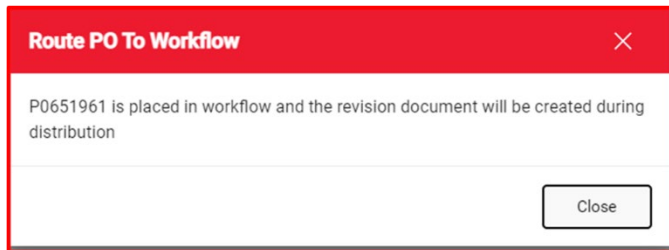
- The revised purchase order must be re-distributed to the supplier, therefore leave the box checked ✓
- **SAVE** and **CLOSE**

Step 2. Finalize the Revision (Continued)



The dialog box titled "Route PO To Workflow" has a red header bar with a close button (X). Below the header, a note states: "NOTE: Finalizing a revision will not automatically save changes. Save changes in the po document prior to performing this action." There are two input fields: "PO No." and "Specify a reason for revision" (a text area). Below the text area, it says "1000 characters remaining". A checkbox labeled "Distribute PO" is checked and highlighted with a red box. At the bottom, there are two buttons: "Save" (highlighted with a red box) and "Close".

The PO will move through financial approvals. Once all approvals have been recorded, a revised document will be generated in MMP and distributed to the supplier (if required).



The dialog box titled "Route PO To Workflow" has a red header bar with a close button (X). Below the header, it displays the text: "P0651961 is placed in workflow and the revision document will be created during distribution". At the bottom right, there is a "Close" button.

**This dialog box will appear once you have clicked on SAVE in the Route PO To Workflow dialog box.*

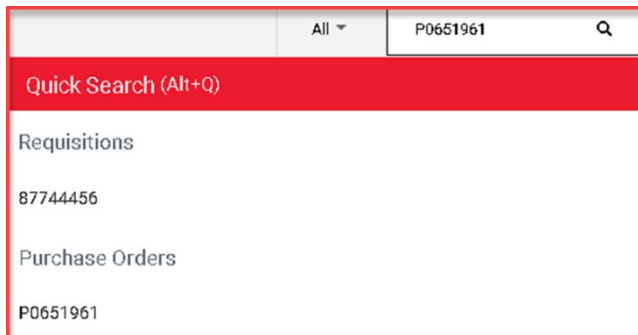
To inquire on the status of the change order, please refer to [What is the status of my Change Order?](#)

Cancelling Existing Line Item(s)

If the purchase order has only one-line item, first add a new line, then cancel the original line. Failure to follow this order will result in the purchase order being completely cancelled without the possibility of adding a new non-catalog item. Refer to [Adding and Canceling Line Item\(s\)](#) section of this document.

Step 1. Enter the PO number in the search engine

- Select the purchase order number



Quick Search (Alt+Q)

Requisitions


87744456

Purchase Orders

P0651961

Step 2. **Go to Summary** section in the top Menu bar

Step 3. Go to **Vendor Information**

- Click on the **Edit** icon 
- Enter the reason for the change order in **Note to Vendor** and **Save**



Vendor Information

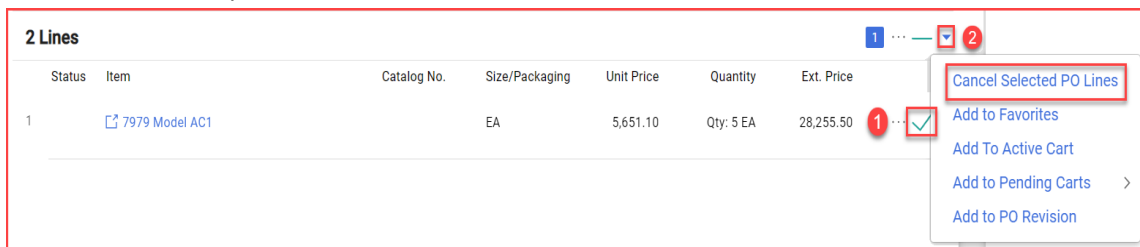
Note to Supplier

Change order: Revised PO to add new lines per email request from Jane Smith, Jan 1, 2020

912 characters remaining [expand](#) | [close](#)

Step 4. Scroll down to the line item(s) that need to be canceled.

- Select them one at a time
- Go back up to the Lines header section where the selected canceled items are grouped and numbered
- Select the drop-down arrow, then **Cancel Selected PO Lines**



2 Lines

Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1	7979 Model AC1		EA	5,651.10	Qty: 5 EA	28,255.50

Cancel Selected PO Lines

Add to Favorites

Add To Active Cart

Add to Pending Carts

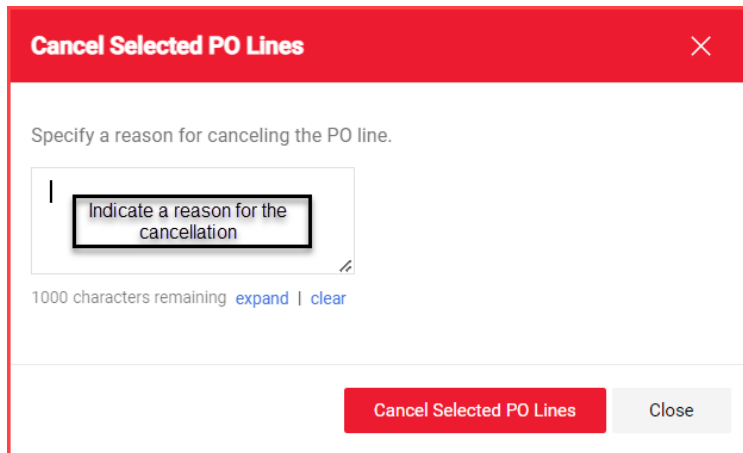
Add to PO Revision

Step 4.

Scroll down to the line item(s) that need to be cancelled (Continued)

Step 4. (Continued)

Enter a reason for the cancellation

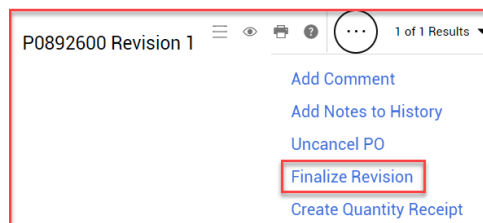


A modal dialog box titled "Cancel Selected PO Lines" with a red header bar and a close button (X) in the top right corner. The main content area has a light gray background and contains the text "Specify a reason for canceling the PO line." Below this is a text input field with a placeholder text "Indicate a reason for the cancellation". To the right of the input field is a small icon of a pencil. Below the input field, it says "1000 characters remaining" followed by "expand" and "clear" links. At the bottom of the dialog, there are two buttons: "Cancel Selected PO Lines" (red) and "Close" (gray).

Step 5. Finalize the Revision

Once all the modifications have been completed, **Finalize the Revision**.

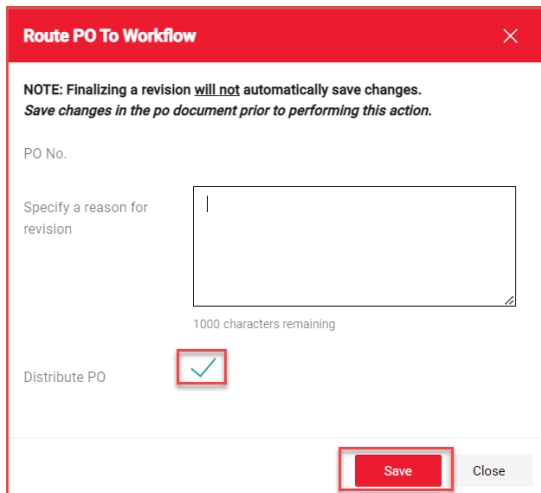
- Scroll up to the PO number and select the three dots at the right of the page then finalize your revision



A screenshot of a dropdown menu for "P0892600 Revision 1". The menu is open, showing several options: "Add Comment", "Add Notes to History", "Uncancel PO", "Finalize Revision" (highlighted with a red box), and "Create Quantity Receipt". The "Finalize Revision" option is the one to be selected.

- Select **Finalize Revision**
- The revised purchase order must be re-distributed to the supplier, therefore leave the box checked ✓
- **SAVE** and **CLOSE**

Step 5. Finalize the Revision (Continued)



Route PO To Workflow [X]

NOTE: Finalizing a revision will not automatically save changes.
Save changes in the po document prior to performing this action.

PO No.

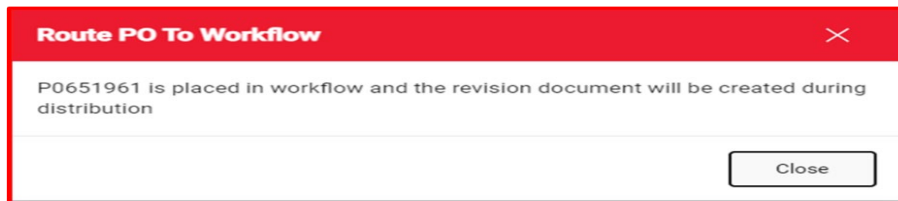
Specify a reason for revision

1000 characters remaining

Distribute PO ☒

Save Close

The PO will move through financial approvals. Once all approvals have been recorded, a revised document will be generated in MMP and distributed to the supplier (if required).



Route PO To Workflow [X]

P0651961 is placed in workflow and the revision document will be created during distribution

Close

**This dialog box will appear once you have clicked on SAVE in the Route PO To Workflow dialog box.*

To inquire on the status of the change order, please refer to [What is the status of my Change Order](#)

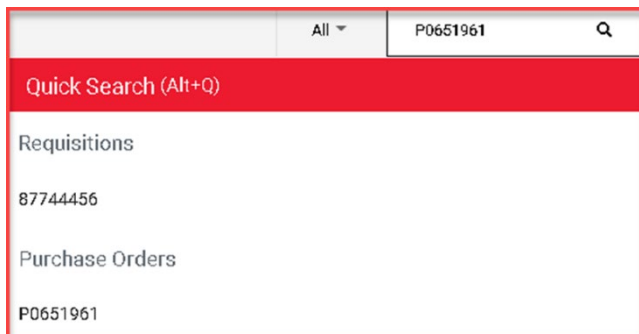
FOAPAL Modifications

Modifying a FOAPAL without Financial Transactions

If a purchase order FOAPAL(s) must be modified, and there are no financial transactions posted in Banner or MMP against the PO, follow the steps indicated below.

Step 1. Enter the PO number in the search engine.

- Select the purchase order number.



Quick Search (Alt+Q)

Requisitions


87744456

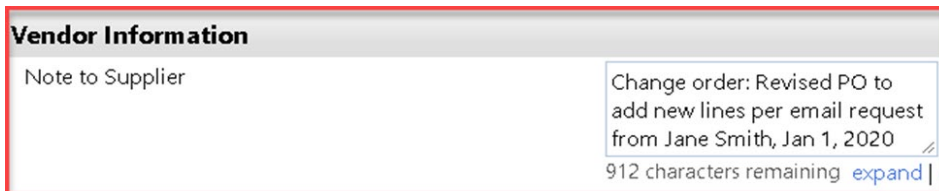
Purchase Orders

P0651961

Step 2. Go to **Summary** section in the top Menu bar

Step 3. Go to **Vendor Information**

- Click on the **Edit** icon 
- Enter the reason for the change order in **Note to Supplier** and **Save**




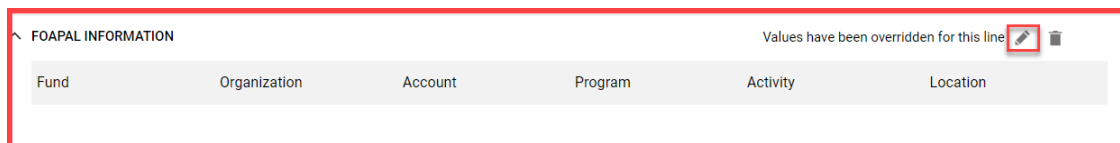
Vendor Information

Note to Supplier



Change order: Revised PO to add new lines per email request from Jane Smith, Jan 1, 2020

912 characters remaining [expand](#) | c

Step 4. Go to the line item that you would like to modify, in the FOAPAL Information section of that line, click on the edit icon 



FOAPAL INFORMATION

Values have been overridden for this line  

Fund	Organization	Account	Program	Activity	Location
------	--------------	---------	---------	----------	----------

Step 4. (Continued)

- To override the existing FOAPAL string, type over the information indicated in each respective FOAPAL box.
- Click on the check mark ✓
- To add additional foapal(s) refer to **Splitting a FOAPAL** below.

Override Line 2: FOAPAL Information

Fund	Organization	Account	Program	Activity	Location
Search 1	No Value	Search 2	No Value	Search 3	Search 4

5 + ✓

6 Save Close

- **SAVE**

Step 5. Splitting a FOAPAL

To add multiple FOAPAL lines, click on the + sign, then select from the drop-down menu all depending on how you would like to split the FOAPAL(s).

Override Line 2: FOAPAL Information

Fund	Organization	Account	Program	Activity	Location	% of Price
159395	00356	700002	4106	000000	000000	% of Price
159395	00356	700002	4106	000000	000000	% of Qty

Split by FOAPAL

To split a transaction using multiple FOAPAL's select the + sign
To validate the FOAPAL information, select the check mark

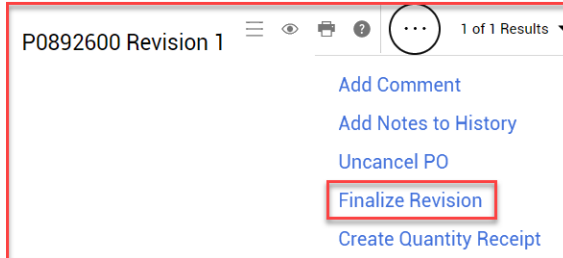
Save Close

- If using Amount of Price, ensure line-item totals match the overall total amount
- If using % of Price or % of Qty, ensure the % total is equal to 100 %
- **SAVE**

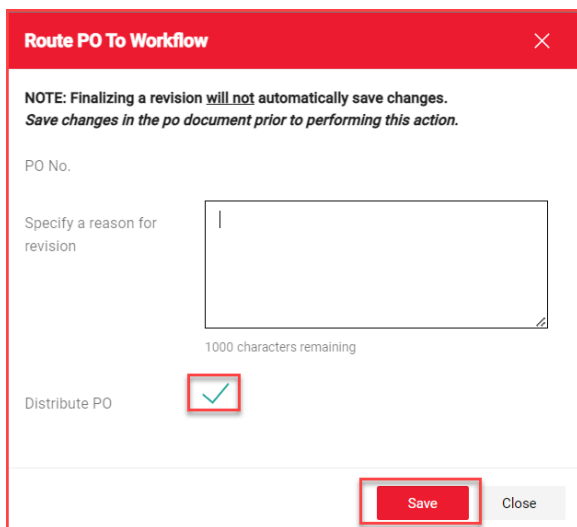
Step 6. Finalize the Revision

Once all the modifications have been completed, **Finalize the Revision**.

- Scroll up to the PO number and select the three dots at the right of the page then finalize your revision.

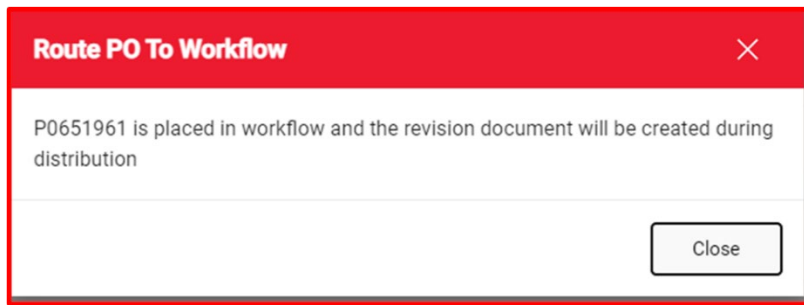


- Select **Finalize Revision**
- The revised purchase order must be re-distributed to the supplier, therefore leave the box checked ✓
- **SAVE** and **CLOSE**

A screenshot of a dialog box titled 'Route PO To Workflow' with a red header bar and a close button (X) in the top right corner. Inside the dialog, there is a note: 'NOTE: Finalizing a revision will not automatically save changes. Save changes in the po document prior to performing this action.' Below the note, there is a label 'PO No.' followed by a text input field. Underneath that is a label 'Specify a reason for revision' followed by a larger text area. Below the text area, it says '1000 characters remaining'. At the bottom left, there is a label 'Distribute PO' next to a checkbox that is checked with a green checkmark and is highlighted with a red rectangular box. At the bottom right, there are two buttons: 'Save' (highlighted with a red rectangular box) and 'Close'.

The PO will move through financial approvals. Once all approvals have been recorded, a revised document will be generated in MMP and distributed to the supplier (if required).

Step 6. Finalize the Revision (Continued)



**This dialog box will appear once you have clicked on SAVE in the Route PO To Workflow dialog box.*

To inquire on the status of the change order, please refer to [What is the status of my Change Order](#)

Modifying a FOAPAL with Financial Transactions

If a purchase order FOAPAL(s) must be modified, and there are financial transactions posted in Banner or MMP against the PO, please reach out to Procurement Services by submitting a [JIRA ticket](#). Our dedicated frontline support staff will be happy to assist you.

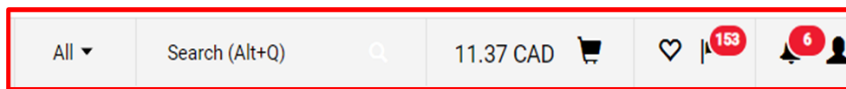
Miscellaneous Changes

Adding Comments and Attachments

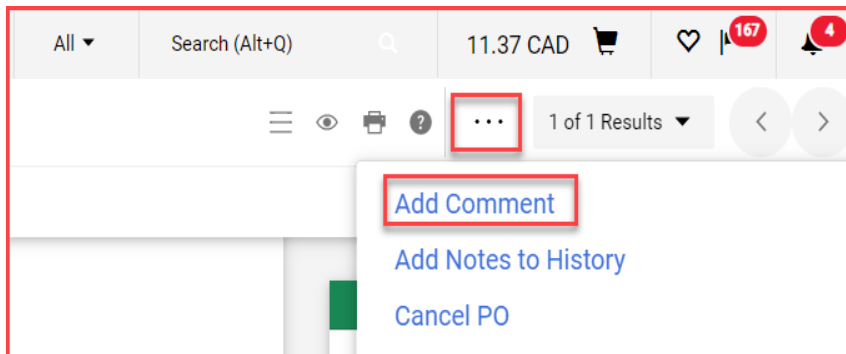
To add additional information or supporting documents once the order has been placed, whether it is a Requisition, Purchase Order, or an Invoice, click on the **Add Comment** function in MMP.

Option A

- Go to the MMP homepage and locate the Requisition, Purchase Order, or Invoice number by entering in the number in the search (Alt + Q) engine bar at the top right-hand side of the page. Ensure type parameters remains at ALL.



- Go to the 3 dots located at the top right side of the page and select **Add Comment**



- In the pop-up box, enter an explanation in the text box

Option A (continued)

- Add an email recipient (this will alert the user that a comment has been added to the order) or put a check mark on the pre-populated email recipients.
- Add a File Name (invoice attachment)
- **Choose File**
- **Add Comment**

Option B

- Go to the MMP homepage and locate the Requisition, Purchase Order, or Invoice number by entering in the number in the search (Alt + Q) engine at the top right-hand side of the page.

- Go to the menu at the top of the purchase order and select the Comments button

- In the pop-up box, enter an explanation in the text box

Add Comment

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s) | [Add recipient](#)

☐ Lori Edgar (Prepared by, Prepared for) <lori.edgar@mcgill.ca>

Insert your comment here

1000 characters remaining [expand](#) | [clear](#)

Attach file (optional)

Attachment Type

☒ File☐ Link/URL

File Name

File

Choose FileUpload your file

Add Comment

Close

- Add an email recipient (this will alert the user that a comment has been added to the order)
- Add a File Name (invoice attachment)
- **Choose File**
- **Add Comment**

43

Modifying Descriptions online Item(s)

Modifications to line-item descriptions on a purchase order can only be amended if the original purchase requisition was submitted as a non-catalog order. However, Self-Managed, Hosted and Punchout cataloged descriptions cannot be modified.


Step 1. Enter the PO number in the search engine

- Select the purchase order number.

The screenshot shows a search bar with a dropdown menu set to 'All' and a search input field containing 'P0651961'. Below the search bar is a red header with the text 'Quick Search (Alt+Q)'. The search results are displayed in a list under the heading 'Requisitions'. The first result is '87744456'. Below this, under the heading 'Purchase Orders', is the result 'P0651961'.

Step 2. **Go to Summary** section in the top Menu bar

Step 3. Go to **Vendor Information**

- Click on the **Edit** icon 
- Enter the reason for the change order in **Note to Supplier** and **Save**

The screenshot shows the 'Vendor Information' section. It has a header 'Vendor Information' and a sub-header 'Note to Supplier'. Below this is a text area containing the text 'Change order: Revised PO to add new lines per email request from Jane Smith, Jan 1, 2020'. At the bottom of the text area, it says '912 characters remaining' and 'expand | c'.

Step 4. Go to the line item that you would like to change the description for.

- Click on the Item hyperlink and the below dialog box will open.
- Override the information in the Product Description box.

The screenshot shows the 'Non Catalog Item' dialog box. It has a red header with the text 'Non Catalog Item' and a close button. Below the header is a section for 'Fulfillment Address' with a dropdown arrow. The address is 'Business/Organization 1 - Goodman Cancer Research Centre, 1160, avenue des Pins Ouest, #602, Montreal, Quebec H3A 1A3 Canada'. Below this is a section for 'Item' with a dropdown arrow. It contains a table with the following columns: 'Product Description (50 characters max):', 'Catalog No.', 'Quantity', 'Unit Price (before taxes)', and 'Quantity and Unit of Measure'. The first row of the table has the following values: 'FACSArialll', an empty field, '1', '130.50', 'CAD', and 'EA - Each'. Below the table, it says '243 characters remaining'. At the bottom right, there are 'Save' and 'Close' buttons. A star icon and the text 'Required fields' are at the bottom left.

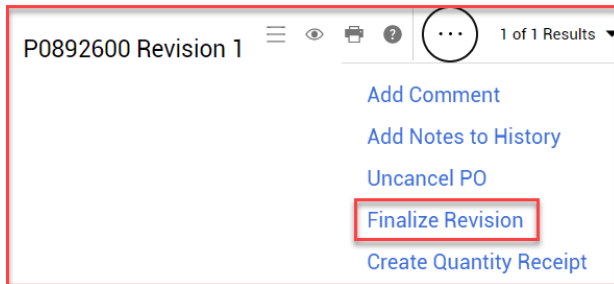
- Click on **SAVE**

Note: Repeat process if other line items need to be changed.

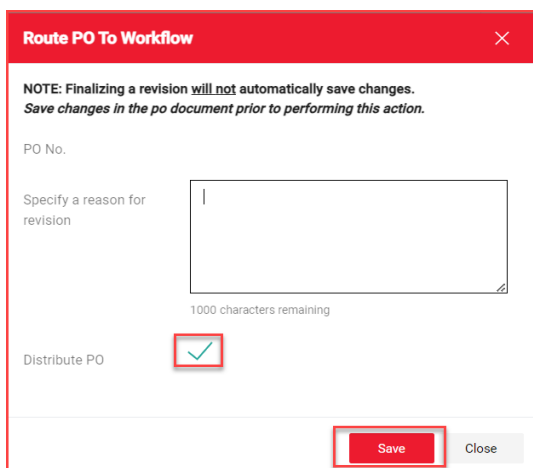
Step 5. Finalize the Revision

Once all the modifications have been completed, **Finalize the Revision**.

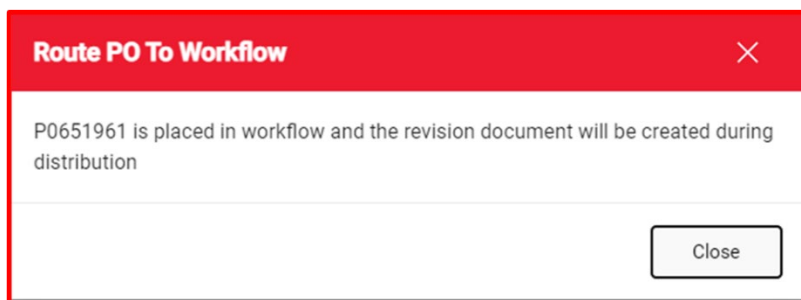
- Scroll up to the PO number and select the three dots at the right of the page then finalize your revision



- Select **Finalize Revision**
- The revised purchase order must be re-distributed to the supplier, therefore leave the box checked ✓
- **SAVE** and **CLOSE**

A screenshot of a dialog box titled 'Route PO To Workflow' with a red header bar and a close button (X) in the top right. The dialog contains a note: 'NOTE: Finalizing a revision will not automatically save changes. Save changes in the po document prior to performing this action.' Below the note, there is a label 'PO No.' followed by a text input field. Underneath the input field is a label 'Specify a reason for revision' followed by a larger text area. Below the text area, it says '1000 characters remaining'. At the bottom left, there is a label 'Distribute PO' next to a checked checkbox, which is highlighted with a red rectangular box. At the bottom right, there are two buttons: 'Save' (highlighted with a red rectangular box) and 'Close'.

The PO will move through financial approvals. Once all approvals have been recorded, a revised document will be generated in MMP and distributed to the supplier (if required).

A screenshot of the 'Route PO To Workflow' dialog box, which now displays a confirmation message: 'P0651961 is placed in workflow and the revision document will be created during distribution'. The dialog has a red header bar with the title 'Route PO To Workflow' and a close button (X) in the top right. At the bottom right, there is a 'Close' button.

**This dialog box will appear once you have clicked on SAVE in the Route PO To Workflow dialog box.*

To inquire on the status of the change order, please refer to [What is the status of my Change Order](#)

Modifying Delivery Dates

If a delivery date must be modified on a purchase order, please reach out to Procurement Services by submitting a [JIRA ticket](#). Our dedicated frontline support staff will be happy to assist you.

Modifying Shipping Information

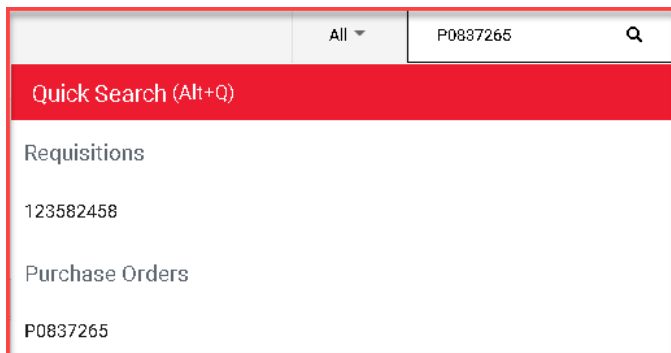
If shipping information must be modified on a purchase order, please reach out to Procurement Services by submitting a [JIRA ticket](#). Our dedicated frontline support staff will be happy to assist you.

Changes to Specialty Ordering

Hotels



Step 1. Enter the PO number in the search engine

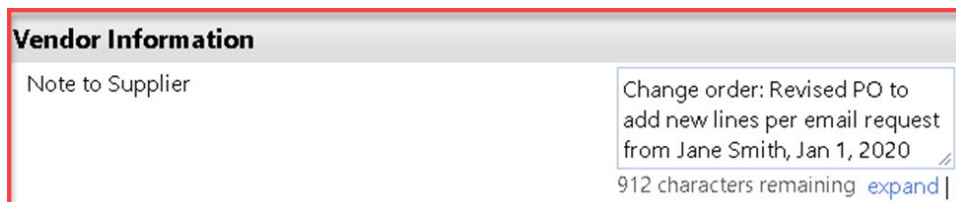
- Select the Purchase order number
- Go to the **Summary** Menu



The screenshot shows a search bar with a dropdown menu set to 'All' and a search icon. The search term 'P0837265' is entered. Below the search bar, a red header reads 'Quick Search (Alt+Q)'. The search results are divided into two sections: 'Requisitions' with the number '123582458' and 'Purchase Orders' with the number 'P0837265'.


Step 2. Go to **Vendor Information**

- Click on the edit icon 
- Enter the reason for the change order in **Note to Supplier**
- Click on Save 



The screenshot shows the 'Vendor Information' form. The 'Note to Supplier' field is active, and the text 'Change order: Revised PO to add new lines per email request from Jane Smith, Jan 1, 2020' is entered. Below the text, it says '912 characters remaining' and there is an 'expand' link.

Step 3. Go to **Summary** and scroll down to the line item to be modified

- Select the hyperlinked Item
- Modify the Form information as needed
- Ensure to add or modify the lodging tax of 3.5% as required
- Scroll down to the bottom of the page and **Recalculate icon** 
- Scroll back up to the top right of the form, click on Save, select **Save** icon
- Close

Save

Order Details

A Lodging Tax equivalent to 3.5% of the room rate before taxes must be added to your shopping cart. We have pre-calculated the dollar amount. You simply need to add in the number of nights in the Quantity field below.

High Season period is May 1st to October 31st

Low Season period is November 1st to April 30th

Nightly Room Rate (May 1, 2021 to April 30, 2022)

Description	Unit Price	Quantity	Ext. Price
Accommodation rate per night (High Season)	115.00	<input type="text"/>	
Accommodation rate per night (Low Season)	115.00	<input type="text"/>	
Lodging Tax / 3.5% required (High Season)	4.03	<input type="text"/>	
Lodging Tax / 3.5% required (Low Season)	4.03	<input type="text"/>	
Total			0.00

Nightly Room Rates (May 1, 2022 to April 30, 2023)

Description	Unit Price	Quantity	Ext. Price
Accommodation rate per night (High Season)	150.00	<input type="text"/>	
Accommodation rate per night (Low Season)	115.00	<input type="text" value="4"/>	160.00
Lodging Tax / 3.5% required (High Season)	5.25	<input type="text"/>	
Lodging Tax / 3.5% required (Low Season)	4.03	<input type="text" value="4"/>	16.12
Total			476.12

Nightly Room Rate (May 1, 2023 to April 30th, 2024)

Total 476.12 CAD

Step 4. Foapal Modifications

- Modification of FOAPAL information (if necessary), please see [Foapal Modifications](#)


MODIFICATIONS TO FOAPALS CANNOT BE OVERRIDDEN

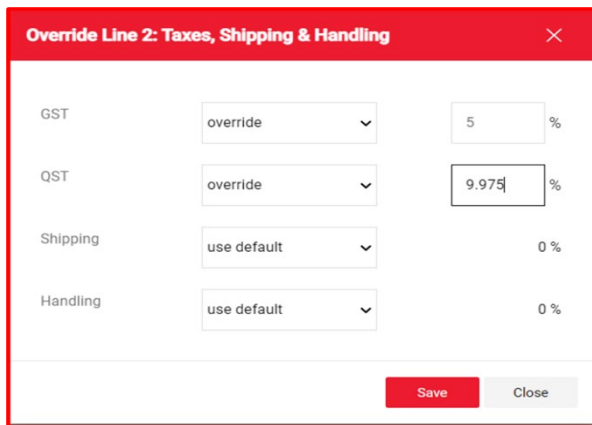
If you need to modify a FOAPAL, go to the [Foapal Modifications](#) section of this document.

Step 5. Taxes Shipping & Handling

When adding new lines to a purchase order, the taxes must be updated according to the selection previously indicated on the above lines of the PO. E.g., GST & QST, or GST only, or none.

If the PO does not apply taxes, then skip this step and go to Step 6.

- Go to the newly added line, then to **Item Details**
- Click on the **Edit** icon 
- Check off the box **Taxable** then **Save**.
- Go to GST (override) and QST (override)
- GST: Select Override then enter 5 in the box
- QST: Select Override then enter 9.975 in the box
- Save
- The taxes will be re-calculated.



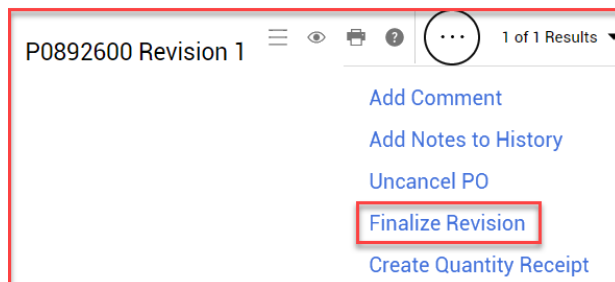
Override Line 2: Taxes, Shipping & Handling		
GST	override	5 %
QST	override	9.975 %
Shipping	use default	0 %
Handling	use default	0 %

Do not modify Shipping or Handling. If either are required, they can be added to the purchase order as a separate product line item entry. To inquire on the steps, go to [Creating a Line Item](#)

Step 6. Finalize the Revision

Once all the modifications have been completed, **Finalize the Revision**.

- Scroll up to the PO number and select the three dots at the right of the page then finalize your revision



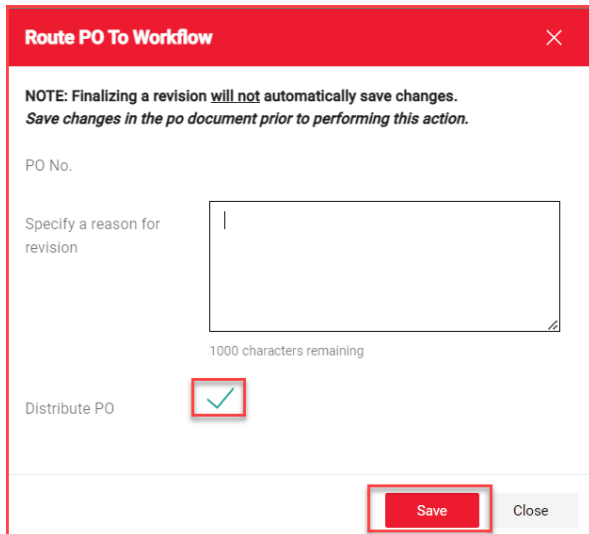
P0892600 Revision 1

1 of 1 Results

- Add Comment
- Add Notes to History
- Uncancel PO
- Finalize Revision**
- Create Quantity Receipt

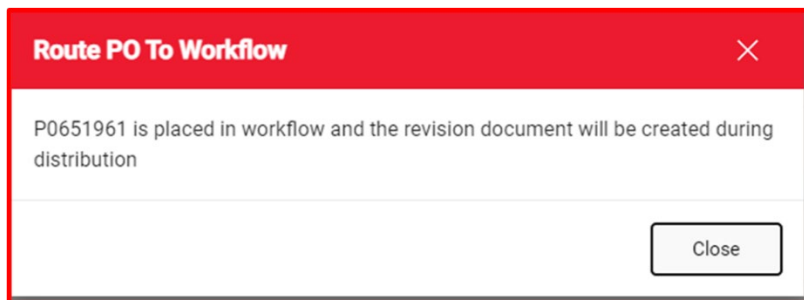
Step 6. Finalize the Revision (Continued)

- Select **Finalize Revision**
- The revised purchase order must be re-distributed to the supplier, therefore leave the box checked ✓
- **SAVE** and **CLOSE**



The dialog box titled "Route PO To Workflow" has a red header bar with a close button (X). Below the header, a note states: "NOTE: Finalizing a revision will not automatically save changes. Save changes in the po document prior to performing this action." There are two input fields: "PO No." and "Specify a reason for revision" (a text area with a 1000 character limit). Below the text area is a checkbox labeled "Distribute PO" which is checked and highlighted with a red box. At the bottom right, there are two buttons: "Save" (highlighted with a red box) and "Close".

The PO will move through financial approvals. Once all approvals have been recorded, a revised document will be generated in MMP and distributed to the supplier (if required).



The dialog box titled "Route PO To Workflow" has a red header bar with a close button (X). The main content area displays the message: "P0651961 is placed in workflow and the revision document will be created during distribution". At the bottom right, there is a single button labeled "Close".

**This dialog box will appear once you have clicked on SAVE in the Route PO To Workflow dialog box.*

To inquire on the status of the change order, please refer to [What is the status of my Change Order](#)

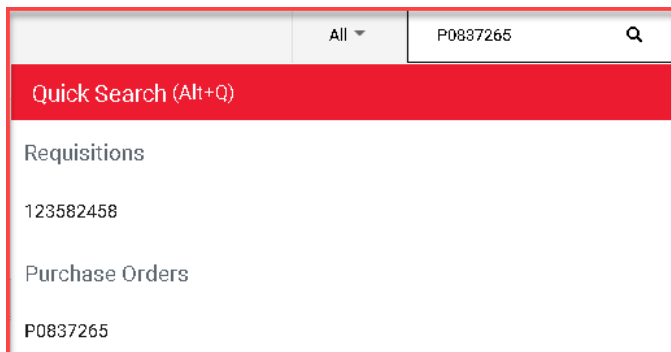
Campus Security

Modifying a Campus Security Order Form

To modify a Campus Security purchase order, please follow the following steps:



Step 1. Enter the PO number in the search engine

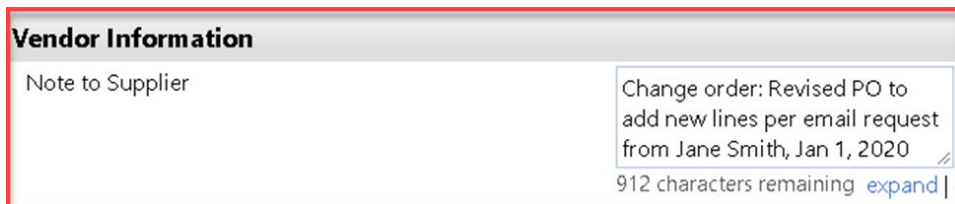
- Select the Purchase order number
- Go to the **Summary** Menu



The screenshot shows a search interface with a header bar containing a dropdown menu set to 'All', a search input field with 'P0837265', and a search icon. Below the header is a red bar labeled 'Quick Search (Alt+Q)'. The search results are displayed in two sections: 'Requisitions' with the value '123582458' and 'Purchase Orders' with the value 'P0837265'.



Step 2. Go to **Vendor Information**

- Click on the edit icon 
- Enter the reason for the change order in **Note to Supplier**
- Click on Save 



The screenshot shows the 'Vendor Information' form. The 'Note to Supplier' field is active, and a text box is open showing the entered text: 'Change order: Revised PO to add new lines per email request from Jane Smith, Jan 1, 2020'. Below the text box, it indicates '912 characters remaining' and an 'expand' link.

Step 3. Go to **Summary** and scroll down to the line item to be modified

- Select the hyperlinked Item
- Modify the Form information as needed
- Scroll down to the bottom of the page and **Recalculate icon** 
- Scroll back up to the top right of the form, click on Save, select **Save** icon 
- Close

Type of Agent

Effective **June 1, 2022**, the hourly rate for security agents have increased. Please ensure to fill in the appropriate section according to the service date needed.

Number of Agents Required (EFFECTIVE JUNE 1ST 2022):

Description	Unit Price	Quantity	Ext. Price
Standard Agent (QUANTITY-total # of agents x hours needed)	35.40	<input type="text" value="1"/>	318.60
Certified ASP Construction Agent (QUANTITY-total # of agents x hours needed)	35.50	<input type="text"/>	
Team Leader ASP (QUANTITY-total # of agents x hours needed)	35.70	<input type="text"/>	
Signaller (QUANTITY-total # of agents x hours needed)	35.70	<input type="text"/>	
Patroler/Miribus (QUANTITY-total # of agents x hours needed)	37.43	<input type="text"/>	
Supervisor (QUANTITY-total # of agents x hours needed)	40.71	<input type="text"/>	
Agent for External events (QUANTITY-total # of agents x hours needed)	44.45	<input type="text"/>	
Agent w/Vehicle (QUANTITY-total # of agents x hours needed)	39.90	<input type="text"/>	
Total			318.60

Quantity and Unit of Measure * EA - Each

Step 4. Adding a Non-Catalog Item

Should there be partial hours not included in the form you will need to add the hours as a Non-Catalog item, please see steps below:

- Scroll down to **Lines** Section
- Click on the three dots at the right side of the page.
- Select **Add Non-Catalog Item**
- Enter the required information according to the supplier quotation.
- Product Description
- Catalog No.
- Quantity
- Unit Price
- Unit of Measure – most often EA
- **Save or Save and add another**

46 Lines

Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
	190244 499-501 Pine (Unplanned)		YR	500.00	Qty: 1 YR	500.00

ITEM DETAILS

Contract: no value

Taxable: ☒

Cart/Requisition Number: 87744456 view | print


Internal Note: no value

Add Non-Catalog Item

Step 5. Add Taxes Shipping and Handling

When adding new lines to a purchase order, the taxes must be updated according to the selection previously indicated on the above lines of the PO. E.g., GST & QST, or GST only, or none.

If the PO does not apply taxes, then skip this step and go to Step 6.

- Go to the newly added line, then to **Item Details**
- Click on the **Edit** icon 
- Check off the box **Taxable** then **Save**
- Go to GST (override) and QST (override)

- GST: Select Override then enter 5 in the box
- QST: Select Override then enter 9.975 in the box
- Save
- The taxes will be re-calculated

Override Line 2: Taxes, Shipping & Handling

GST	override	5	%
QST	override	9.975	%
Shipping	use default	0	%
Handling	use default	0	%

Save Close

Do not modify Shipping or Handling. If either are required, they can be added to the purchase order as a separate product line item entry. To inquire on the steps, go to [Creating a Line Item](#)

Step 6. Modification of FOAPAL information (if necessary), please see [Foapal Modifications](#)

Step 7. Finalize the Revision

Once all the modifications have been completed, **Finalize the Revision**.

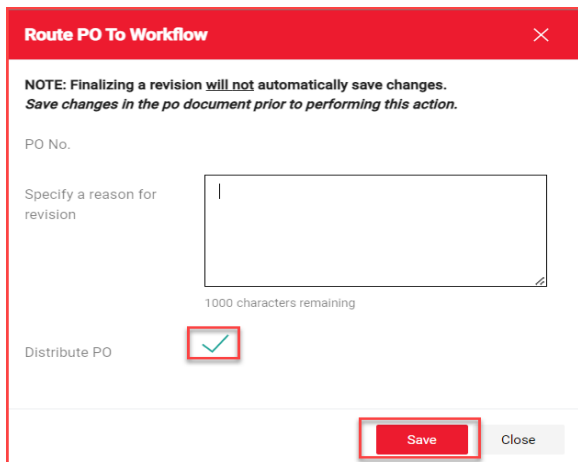
- Scroll up to the PO number and select the three dots at the right of the page then finalize your revision

P0892600 Revision 1

1 of 1 Results

- Add Comment
- Add Notes to History
- Uncancel PO
- Finalize Revision**
- Create Quantity Receipt

- Select **Finalize Revision**
- The revised purchase order must be re-distributed to the supplier, therefore leave the box checked ✓
- **SAVE** and **CLOSE**



Route PO To Workflow [X]

NOTE: Finalizing a revision will not automatically save changes.
Save changes in the po document prior to performing this action.

PO No.

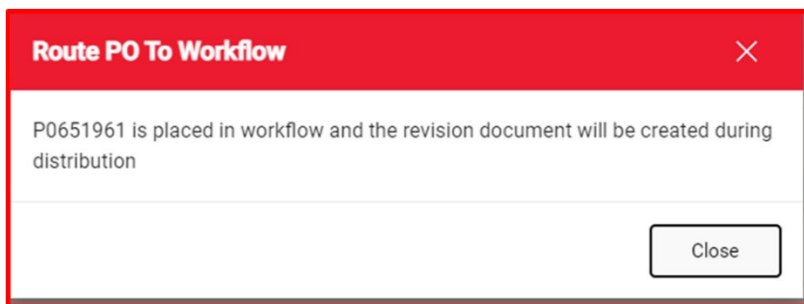
Specify a reason for revision

1000 characters remaining

Distribute PO ☒

Save Close

The PO will move through financial approvals. Once all approvals have been recorded, a revised document will be generated in MMP and distributed to the supplier (if required).



Route PO To Workflow [X]

P0651961 is placed in workflow and the revision document will be created during distribution

Close

**This dialog box will appear once you have clicked on SAVE in the Route PO To Workflow dialog box.*

To inquire on the status of the change order, please refer to [What is the status of my Change Order](#)

Contact Us

- [JIRA Ticketing System](#)
- Telephone: [\(514\) 398-2840](#)