Agenda

- Things to Know About Changes and Closes
- Changing Orders Demo
- Closing Order Demo
Changing an Order

Altering information on an order using a button in Ariba called “Change”.

![Image of Ariba interface with a highlighted 'Change' button]
What to Know Before You Change an Order?

✓ Certain roles can make changes

✓ The Change button will not be visible during a active change request

✓ Not all fields can be changed

✓ The change will need to be approved by everyone on the approval flow

✓ Should you do a change at all? Does a new order make more sense?
Who Can Change an Order?

- Preparer
- Contact
- Edit Access User: An individual listed in the Edit Access section of the BPO.
What Fields You Cannot Change on an Order

- Preparer Name
- Supplier and Supplier Location
- “Is this a Subaward” answer
- Most Description fields of an existing line item
- Subaward item account code and exception item account code
- A taxable account code to a non-taxable account code
- Related Contract ID
Change Approval Process: After You Hit Submit

Ariba creates a new version of the CR: CR###-V2

New CR version gets approved by Budget/Org Approver

Central Office reviews CR depends on item and/or price

After final approval, new version of the BPO created: BPO###-V2
Why Would You Need to Change an Order?

Common Reasons:

• To add money
• Extend the date of the order
• Change the budget
• Change the Contact
• Add an Edit Access user
Scenario 1: Change Contract Dates

*Example Situation:* An invoice comes in after the final invoice date and it cannot be paid.
Scenario 2: Add Edit Access

*Example Situation:* The department needs backups to be able to edit the order because the Contact is going on a long vacation.
Scenario 3: Change Budget

*Example Situation:* The funding for an order has to change to a new budget.
Scenario 4: Adding Money to an Order

*Example Situation:* a department wants to continue using an order, but it is running out of money.
Scenario 5: Change Contact Name

*Sample Situation*: The department Contact name has left the department. Need to replace the Contact name with new employee.
Changing BPOs-What else to know

• If you are an Edit Access user, you cannot edit a “change order” currently in process.
• You cannot change account codes from taxable to non-taxable and vice versa.
• You cannot delete existing line items, you can only add new line items.
After Biennium Note: Change Budget

When making order changes after biennium, remember to “Search for More” to get the newest version of the budget and account code. *i.e.: 2019*
Demonstration
Closing an Order

How do you know if an order is already closed?

- The status can tell you
  - There are two statuses that indicate an order is closed:
    - Closed
    - Inactive

- View the order history tab. It will show you the reason for closure.
  - Example: `closed, expired` or `closed, over limit` or `closed by user`
Closed:

- Money is spent, will close automatically and show as *over limit*.
- A Change was made to an order to reduce the funds to match what is reconciled. This used to be the only way to close an order.
Closing an Order: Status

Inactive:

• Using the **Close Contract** button. If the supplier submitted an invoice afterward, it would be rejected by Ariba.
• If final invoice date lapses, even if there is money left. In this situation, a vendor could still submit an invoice to the order that would need to be reviewed.

*Inactive status and Closed status both close the order and both remove funds from MyFD as an open balance.*
Closing an Order

• The **Close Contract** button is used to close orders that are still open.
  
  ○ *Example Situation:* The department has decided it doesn’t need to use the rest of the remaining funds on an open order.

• The Close Contract button will put the order in **Inactive** status. If the order still had money and a vendor submits an invoice, it will reject.
Demonstration
Closing an Order—What else to know

- You cannot use the “Close Contract” button if the order dates have expired or if the order is out of money.
- If the supplier has had a name change, you will need to close the order and start a new order.
- If you use the “Close Contract” button to close the order, you can use the “Open Contract” button to reopen it.
Reopening an Order

If you click the **Open Contract** button:

- You can only use this button if you used the Close Order button to close the order
- Steps to take:
  - Click “Open Contract” first
  - Do a Change to the order next
- Make sure all fields are accounted for when reopening and updating
  - i.e.: update dollar amounts, dates etc. depending on the intent of the reopen.

If you closed the order by reducing the funds, you will need to do a Change to reopen it.
Questions?