Changing and Closing a BPO
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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 the Change button highlighted.](image-url)
What to Know Before You Change an Order?

Certain roles can make changes

The “Change” button will not be visible during an 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*
Closing an Order: Status

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?