A Quick Guide to Requisitions and Change Orders in ARC
**Vendor lookup**
- use the magnifying glass to look up a supplier

### Vendor Search

**Vendor ID:**

**Name:**

**Short Vendor Name:**

**Alternate Vendor Name:**

**City:**

**Country:**

**Postal Code:**

<table>
<thead>
<tr>
<th>Vendor ID</th>
<th>Name</th>
<th>Default Location</th>
<th>Default Location Description</th>
<th>Address</th>
<th>City</th>
<th>State</th>
<th>State Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>DELL MARKETING LP</td>
<td>ACH-01</td>
<td></td>
<td>One Dell Way</td>
<td>Round Rock</td>
<td>TX</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>DELL FINANCIAL SERV</td>
<td>ACH-01</td>
<td></td>
<td>4319 COLLECTION CENTER DR</td>
<td>CHICAGO</td>
<td>IL</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>ROBIN DELLABOUGH</td>
<td>CHI-01</td>
<td></td>
<td>19 MAPLE STREET</td>
<td>Irvington</td>
<td>NY</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>DELL CATALOG SALES LP</td>
<td>CHI-01</td>
<td></td>
<td>PO BOX 120001</td>
<td>Dallas</td>
<td>TX</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>WENDELL C MARTIN</td>
<td>CHECK</td>
<td></td>
<td>125 HEMPSTEAD GARDENS DRIVE</td>
<td>West Hempstead</td>
<td>NJ</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>ALL AMERICAN SPORTS CORP</td>
<td>CHI-01</td>
<td>CHECK</td>
<td>4200 PAYSHERE CIRCLE</td>
<td>Chicago</td>
<td>IL</td>
<td></td>
</tr>
</tbody>
</table>
- click on Vendor ID field to determine if supplier is available for requisition use

**Vendor Lookup Details**

<table>
<thead>
<tr>
<th>SetID:</th>
<th>CUSET</th>
<th>Vendor ID:</th>
<th>00000095642</th>
<th>✓</th>
<th>Return to Vendor Search</th>
<th>Return to</th>
</tr>
</thead>
</table>

**Vendor Detail**

- **.shortname:** DELL FINAN
- **Name 1:** DELL FINANCIAL SERV
- **Alternate Vndr Name:**
- **Address:** 00001 Billing Address
- **DIF Loc:** ACH-01
- **Corporate Vendor:** CUSET 00000095642  DELL FINANCIAL SERV
- **Remit Vendor:** CUSET 0000009562  DELL FINANCIAL SERV
- **Open For Ordering**
- **Withholding Applicable**
- **VAT Applicable**
- **Status:** Approved
- **Class:** Supplier
- **HR Class:**
- **Persistence:** Regular

- Purchasing address not always the one required by customer. Customer can provide updated purchasing address in the comments field in the Review and Submit screen *(see screenshot below)*

**Create Requisition**

1. Define Requisition
2. Add Items and Services
3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit for approval.

**Requisition Lines**

- **Line:** 1
- **Description:** DELL FINANCIAL SERV
- **Quantity:** 1,000
- **UOM:** Each
- **Price:** $100.00
- **Total:** $100.00

**Comments**

- The supplier address should be 123 Main Street

- Send to Vendor
- Show at Receipt
- Shown at Voucher
- Approval Justification
- More Comments
Bill to/Ship to Address
- requestor can only view selected customer address in the one-time only link for each

Create Requisition

- please be sure to include your department name in the “Building” field and suite/room number in the “Floor” field when completing the one-time address information for the Ship to/Bill To information

Shipping Address

Business Unit: COLUM
Requisition ID: NEXT
Status: Pending

Enter Building, Floor, and Telephone

Country: USA
Address 1: 615 W 131st Street
Building:
Floor:
City: New York City
County: 
State: NY
Postal: 10027

Telephone: 
Extension:
Fax:
Bill To Address: please enter bolded fields below.

Requisition ID: NEXT  Bill To Location ID: 615W131ST8

Enter Building, Floor, and Telephone

- Country: USA
- Address 1: 615 W 131st Street
- Building: 
- Floor: 
- City: New York City
- County: 
- State: NY  Postal Code: 10027  Telephone: 
- Extension: 
- Fax: 

Chartstring
- requisition header versus requisition line entry (it is important that only one of the two following entries are selected)
  1. entry of a chartstring in requisition header will maintain the chartstring value throughout all lines of requisition – additional training information can be found on pages 31 - 41 of the training guide for Requisitions, Change Orders and Purchase Order at http://finance.columbia.edu/files/gateway/content/training/Training_Guides/Requisitions_Change_Orders_and_Purchase_Orders_TRAIN.pdf
  *it is important to note that the header must only have one chartstring. If you require multiple chartstring value(s), this must be inserted into the individual lines as indicated in #2 below.

  2. entry of chartstring(s) into individual lines only will require the entering of chartstring information for each line of requisition

- The Natural Account chartfield is tied directly to the Category Code (present only for requisition processing)
  - Natural Account will update based on Category Code selected (provide example)

Category Codes
- requisition header versus requisition line entry (it is important that only one of the two following entries are selected)
  1. entry in header will maintain category code throughout all lines of requisition
  2. entry in lines only will require category code information for each line of requisition
category codes are important as they are necessary for proper routing of requisition as well as to obtain improved reporting

to look up category codes in ARC when creating a purchase requisition:
  o select the magnifying glass next to the Category Code box
  o select description

Create Requisition

Look Up Category

Note: You may either Search or Browse to look up the appropriate category for your special request.

- type in description and click “Find”

Create Requisition

Look Up Category

Note: You may either Search or Browse to look up the appropriate category for your special request.

Category Code listing is also available through the Purchasing website at
http://finance.columbia.edu/procurement/purchasing

incorrect use of Category Codes can result in misrouting or denial of requisition by Central that can delay the processing of the transaction
Add Items Page

Special Request Items: Special Item versus Fixed Cost Service (additional training information can be found on pages 69 - 96 of the training guide for Requisitions, Change Orders and Purchase Order at http://finance.columbia.edu/files/gateway/content/training/Training_Guides/Requisitions_Change_Orders_and_Purchase_Orders_TRAIN.pdf.

- **Special Item**: the use of this selection is generally for goods related requisitions where the quantity is an important part of the order to the supplier
- **Fixed Cost Service**: the use of this selection is for service related requests that have a specific start and end date (e.g. Consultants, service agreements, leasing, etc.).

  Additional points are:
  
  - only the first line of a requisition can be classified as a Fixed Cost Service as there can only be 1 line that maintains a service start and end date. All other lines must be categorized as Special Items only
  - amount only flag should always be used when selecting a Fixed Cost Service (see Amount Only section below for additional information)
  - multi-year PO’s are available through this selection only (see Multi-year PO’s below for further details)

**Multi-year PO’s (please see job aid for further details)**

- must have budget established for each year you will require (*this can be a $0 budget except for grant related budgets*)
- the due date for each budget line **must** be the last day of the respective fiscal year
- the maximum number of budget years supported by ARC is 4
- in the event the contract runs beyond 4 years, the remaining year(s) would need to be entered into Year 4 requisition line
- the first line of the requisition represents a description of the fixed cost service transaction and does not have any dollar value (*the system will provide an alert indicating the line has $0*). Dollar values must be entered into each of the subsequent Special Item lines along with their relevant chartstrings for each fiscal year.
  
  *budgets beyond year 1 must be established through the budget tool prior to initiating the requisite process

**General Requisition Information**

- when adding a line item it is important to be sure that:
  
  - clear description of product or service that is being requested
    
    - unacceptable line information:
      
      - purchase reagent
      - to purchase computer
      - service agreement

  *never type in “**see quote**” in the line item description
acceptable line information:
- Dell 780 computer with monitor
- Mono-S Strongcation Exchanger
- Annual service contract for GE ultrasound

- the quantity, unit cost and unit of measure is correct
- you include the quote or proposal information (this should be done using the standard comments field and be sure to check the flag "to vendor" so the comments are transferred to the Purchase Order)
- if you have not entered in a chartstring as part of the header process (step 1 of the requisition process) then you will need to do so at this time

**Amount Only Flag**
- used for service related contracts *(not used for capital leasing)*
- if this is not a service related category, then the amount only flag must be selected during the last step of the requisition create process, which is Review and Submit
- when selected, all quantities on the respective line(s) will be converted to a value of 1 unit
- it is also important to review the extended dollar value of the line item(s) as this might have changed due to the update in the quantity

*note: a guidance document is available on this subject at [http://finance.columbia.edu/files/gateway/content/purchasing/Amount%20Only%20Flags%20Guidance%2011262012.pdf](http://finance.columbia.edu/files/gateway/content/purchasing/Amount%20Only%20Flags%20Guidance%2011262012.pdf)*

**Review and Submit Page**
- this is the final opportunity to review the transaction prior to submitting into workflow for approval
- all elements should be reviewed for accuracy
- *a budget check should be performed prior to submitting the transaction into workflow and should budget check fail, this must be corrected prior to submitting*
- if you want to update the amount only flag for the line(s) this is the point at which this is accomplished:
  - select the yellow notepad to the far right of the line which represents “line details”
  - this will open up a screen that will provide the line details and the “Amount Only” selection is located at the right bottom of the line details
  - if this flag is updated, once the flag is selected a warning will appear indicating that the quantity of the line will be converted to 1 unit *(amount only can only have a quantity of 1)*
Edit Requisition

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: Columbia University
Requester: James P. Gray
Requisition Name: 0603106 PT Treadmill

Requisition Lines

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Vendor Name</th>
<th>Quantity</th>
<th>Unit</th>
<th>Price</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>TMILL - 0822374/H9R/9R9G</td>
<td>GYM SOURCE</td>
<td>1,000</td>
<td>Each</td>
<td>4,019.00</td>
<td>4,019.00</td>
</tr>
<tr>
<td>2</td>
<td>FREIGHT DELIVERY INSTALL</td>
<td>GYM SOURCE</td>
<td>1,000</td>
<td>Each</td>
<td>487.00</td>
<td>487.00</td>
</tr>
</tbody>
</table>

Create Requisition

Line Details

Line: 1  TMILL - 0822374/H9R/9R9G  Line Status: Pending

Item Details

Merchandise Amt: 4,019.00 USD
Category: 0822374000
Description: Sports Equipment and accessories
Buyer: W/2185
Vendor: 0000006147 GYM SOURCE
Vendor Location: CHK-01
Vendor’s Catalog: 
Vendor Item ID: 
Manufacturer ID: 
UPN ID: 
Manufacturer: 
Manufacturer’s Item ID: 
Physical Nature: 00000
RFQ Required: 
Device Required: 
Zero Price Indicator: 
Amount Only: 
Inspection Required: 

Edit Requisition

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: Columbia University
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<td>1,000</td>
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<td>487.00</td>
<td>487.00</td>
</tr>
</tbody>
</table>
For Multi-year contracts

- select the small triangle icon to the left of the line number - this will expand the line information
- select the tab for Budget Information
- update the budget date to correspond with each fiscal year

- for details on how to complete a multi-year requisition please go to the Purchasing website and click on “Multi-Year Requisitions Guidance”
- be sure Due Date is set to the end of the respective fiscal year for that line

**Edit Requisition**

1. Define Requisition  
2. Add Items and Services  
3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit for approval.

**Business Unit:** Columbia University  
**Requestor:** Razaee-Alie Rameza  
**Requisition Name:** Gotham Energy, PO

**Requisition Lines**

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Vendor Name</th>
<th>Quantity</th>
<th>UOM</th>
<th>Price</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Energy Program</td>
<td>GOTHEN ENERGY 200 LLC</td>
<td>1.0000 Each</td>
<td>0.0000</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>2</td>
<td>FX12-13</td>
<td>GOTHEN ENERGY 200 LLC</td>
<td>1.0000 Each</td>
<td>30,000,000.00</td>
<td>30,000,000.00</td>
<td></td>
</tr>
</tbody>
</table>

- once completed and you are back on the Review and Submit page it is strongly advised you run the budget check process (this can potentially avoid the requisition being stopped right before the PO is issued and cause delays). For multi-year requisitions, you must receive a “valid” or “warning*” on the budget, if you receive an error, the budget line was not created and you must review with your business manager to have the budget created in the budget tool and rerun the budget check (verify budget dates are correct)

- $0 line items can be accomplished, but a warning will be displayed so the customer is aware there are no monies on this line

**Reporting**

- Guidance for generating requisition and Purchase Order based reports can be obtained on page 236 at [http://finance.columbia.edu/files/gateway/content/training/Training_Guides/Requisitions_Change_Orders_and_Purchase_Orders_TRAIN.pdf](http://finance.columbia.edu/files/gateway/content/training/Training_Guides/Requisitions_Change_Orders_and_Purchase_Orders_TRAIN.pdf)

**Using UwPA’s**

- It is important that both the supplier ARC ID and the Category Code match the preferred supplier information in order for the auto-sourcing feature occur
- To determine if a UwPA has been selected for a Purchase Requisition please reference the ARC training information found on pages 58 - 61 of the training guide for Requisitions, Change Orders and Purchase Order at [http://finance.columbia.edu/files/gateway/content/training/Training_Guides/Requisitions_Change_Orders_and_Purchase_Orders_TRAIN.pdf](http://finance.columbia.edu/files/gateway/content/training/Training_Guides/Requisitions_Change_Orders_and_Purchase_Orders_TRAIN.pdf).
- UwPA information can also be found using the Purchasing Guide and selecting the “View by UwPA” tab at [http://finance.columbia.edu/purchasing-guide](http://finance.columbia.edu/purchasing-guide)
Using the Ad Hoc feature
- Do not insert an Adhoc approver(s) for Central University approvals – workflow will route the transaction to the appropriate approvers automatically

Guidance for using the Ad Hoc Approver(s) or Reviewer(s) functionality can be found at http://finance.columbia.edu/files/gateway/content/training/job_aids/Procurement_Workflow_Final.pdf

Change Orders
- Change Order should be done when updates are required for:
  o Increased quantity
  o Increased value
  o Due date
  o Cancellation of the PO
  o Chartstring modification (Financial Change Order)

- Change Orders are not required most times when the value of an invoice exceeds the current PO value within an accepted variance/tolerance. This variance allows for items such as shipping charges and small incidental fees that may not have been anticipated when the purchase order was originally created. Above these thresholds, however, a change order is required to increase the value of the original Purchase Order. Further information on variance/tolerance can be found at http://finance.columbia.edu/procurement/purchasing.

- Once on the Purchasing website, select the “Category Codes and Descriptions for ARC” file (see below) to provide you the variance/tolerance associated with the specific Category Code.
When completing a Change Order it is mandatory that you complete the “Justification” sections this will provide details to both the approver and Central as to what is being changed.
To review changes that have occurred on a PO, go to “Review Change History” in ARC (see screenshot below).

Search by the PO# Change History

Enter any information you have and click Search. 

Find an Existing Value

Limit the number of results to (up to 300): 300

Business Unit: = Colum

PO Number: contains 11259

Change Order Number: =

Search Clear Basic Search Save

Search Results

View All First 1 of 1 Last

Business Unit PO Number Change Order Number
Colum 0000011259 1
The location where changes took place in the PO will be displayed.
PO Liquidation (Close)

- This occurs either through processing a final voucher and selecting the “finalize” icon during the payment process or perform a Change Order to reduce value to $0 or the remaining value.
- Proceed to the “Add/Update” PO page, enter the PO number in the search criteria and use the “contains” filter

- Proceed to reduce PO line values to $0 or less the amount over the already paid/received amount (be sure that the “Amount Only” flag is not checked)

- This can only be done when PO is in “Dispatch” status

- This process can only be used for ARC based PO’s and not converted PO’s

End of guide