Change Request Reference Guide

Table of Contents

What is a Change Request 2

What can be revised with a Change Request 2

What cannot be revised with a Change Request 2

Who can initiate the Change Request 2

Editing Account Codes on the Change Request 4

- Header Level Account Changes 4
- Line Item Level Account Changes 5

Editing or Adding Items for the Supplier 7

How to add Internal or External Notes or Attachments 10

How to View What Has Been Changed/Edited on a Change Request 12

Submitting the Request 13

Draft Change Requests 14

How do I locate Change Requests 15

- When you have the change request number 15
- When you do not have the change request number 16

How do I cancel/delete a Change Request 16

- Draft (not submitted) Change Request 16
- Pending Change Request 17
  - Submitted by you 17
  - Submitted by someone else 17

What is a Change Request

A change request is available for a department allocator to initiate changes on a purchase order that will route for the appropriate approval.

What can be revised with a Change Request

The change request is used when the following PO revisions are needed:

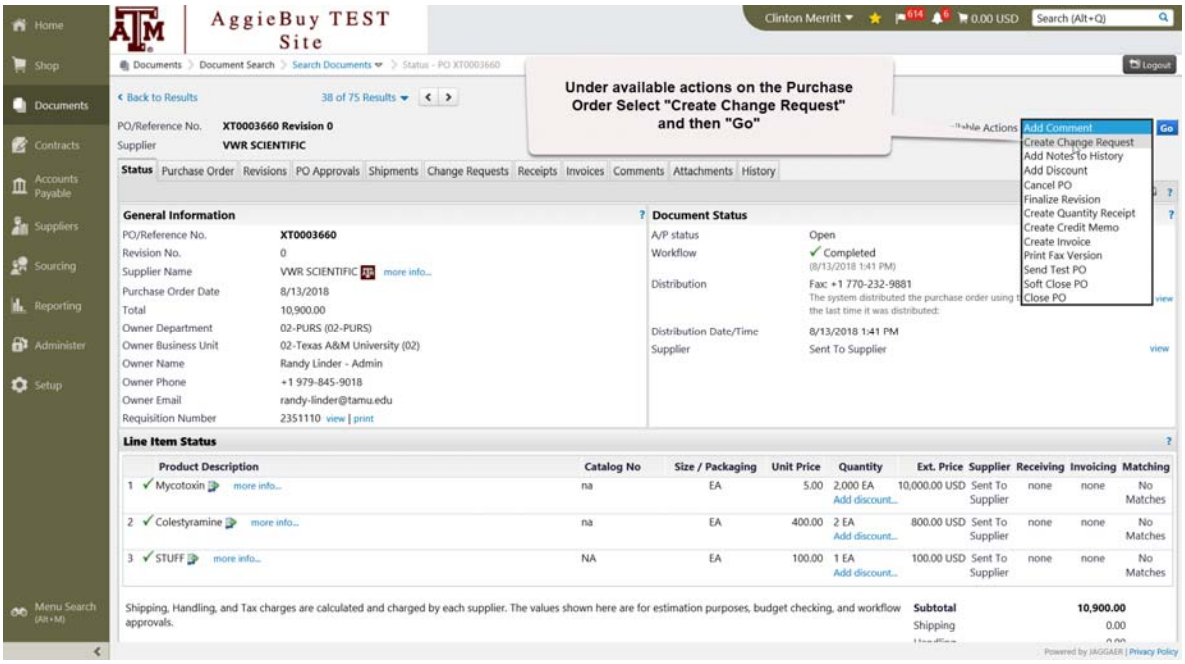
1. The account needs to be updated. This includes splits, complete account changes and line item account additions/revisions
2. The item description needs to be revised
3. The quantity needs to be increased/decreased
    a. This will replace the cancel receipt option
4. The receipt method (quantity to cost) needs to be revised
5. Internal/External Notes or Attachments Need to be added
    a. If you **only** need to add an internal attachment or note a change request is not required. This can be completed through the comments
6. Ship to Address updates

What cannot be revised with a Change Request

1. Punch-out items
    a. If the quantity needs to be reduced you can process the change request and add an internal note on the line item that needs to be revised. The items will then be cancelled from the PO in a manual revision by the back office.

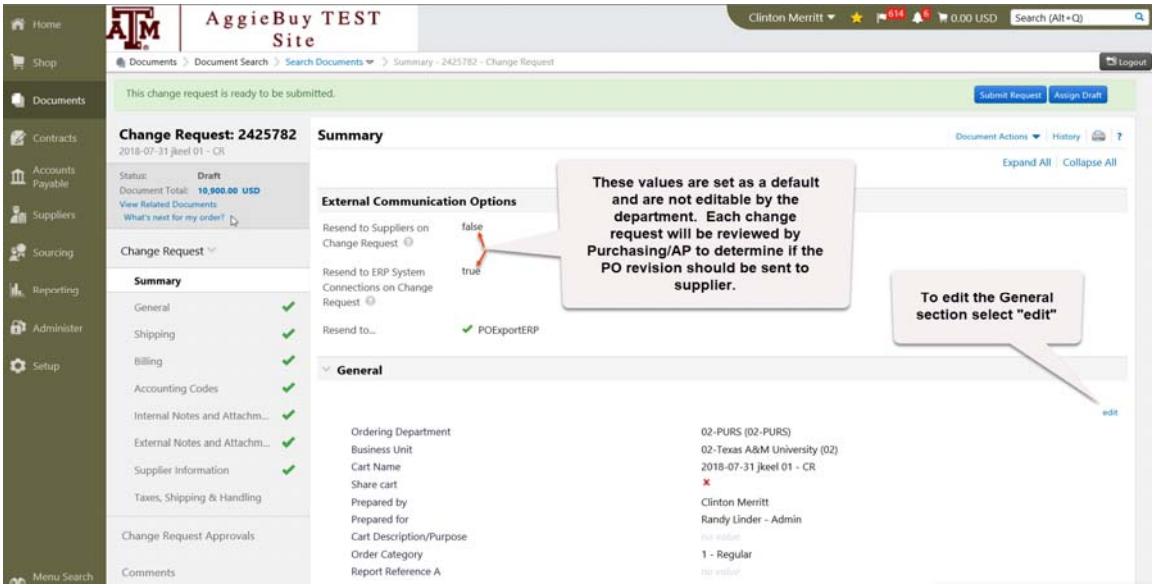
Who can initiate the Change Request

Change requests can only be created by an individual with an allocator role.



Change Request View

This is the summary view of the change request.



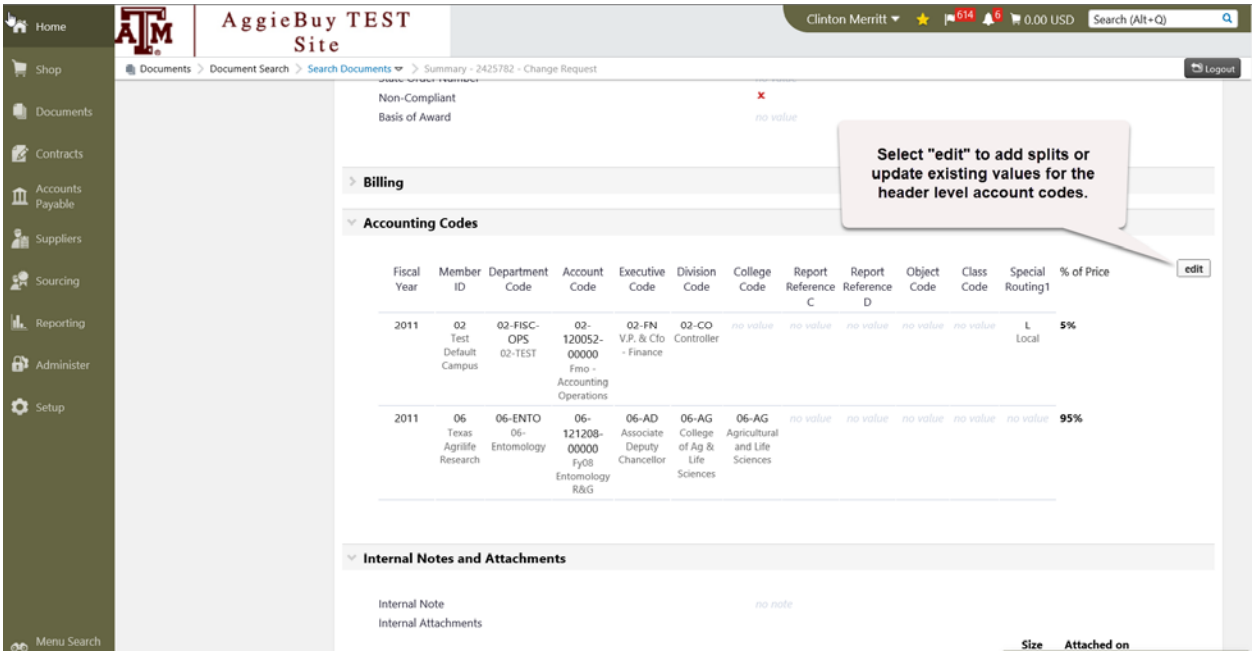
This view is different than our other documents, notice the ability to go to each section is down the left side of the page vs the tab view of other documents. Navigate to the section that needs to be changed by clicking on the section or you can scroll down through the summary page to get to the section. In this guide we will show editing account codes, editing, adding and removing lines and adding notes/attachments.

When creating a change request remember to verify that the "Bypass Department Allocator" is set to Yes since this will not pull from your user profile but may pull from the purchase order.

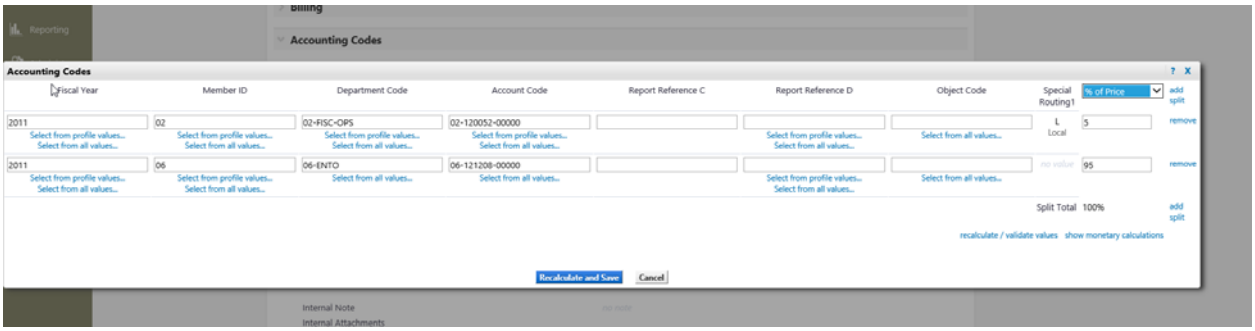
Editing Account Codes on the Change Request

Header Level Account Changes

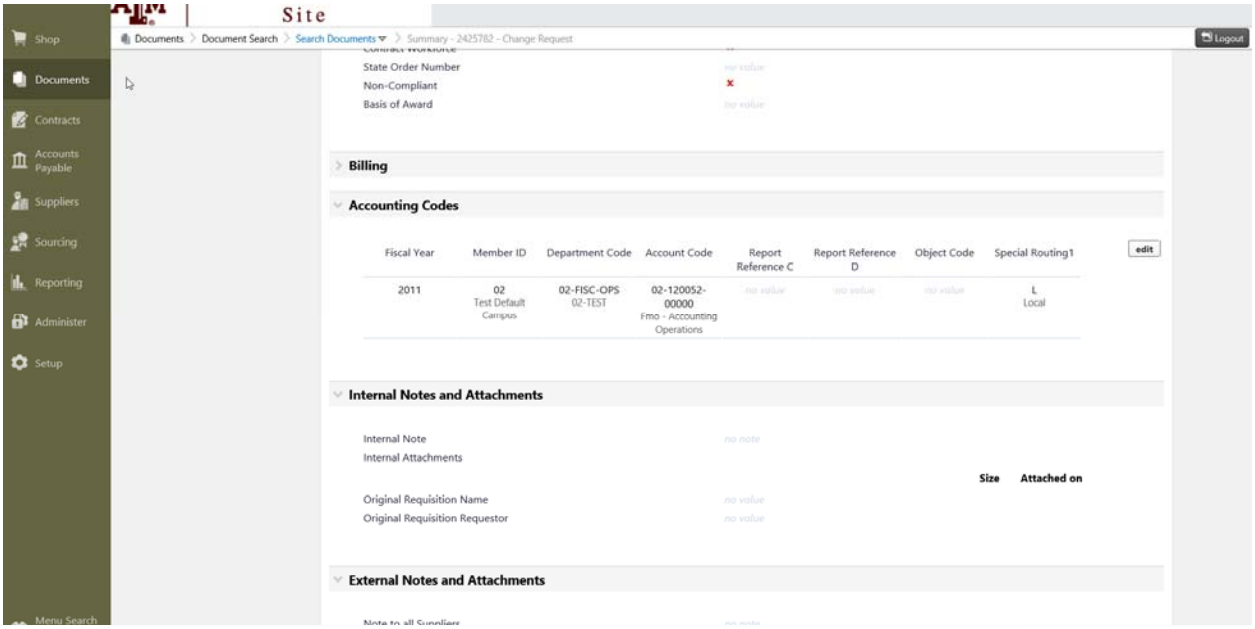
To update the header level accounts codes, just scroll down the Summary Page to the Account Codes section and select edit.



Just like on requisitions you can add another split, remove a split or just edit existing values to be on another department/account or just edit the account code for the current department. You can still select from your profile values or select from all values.

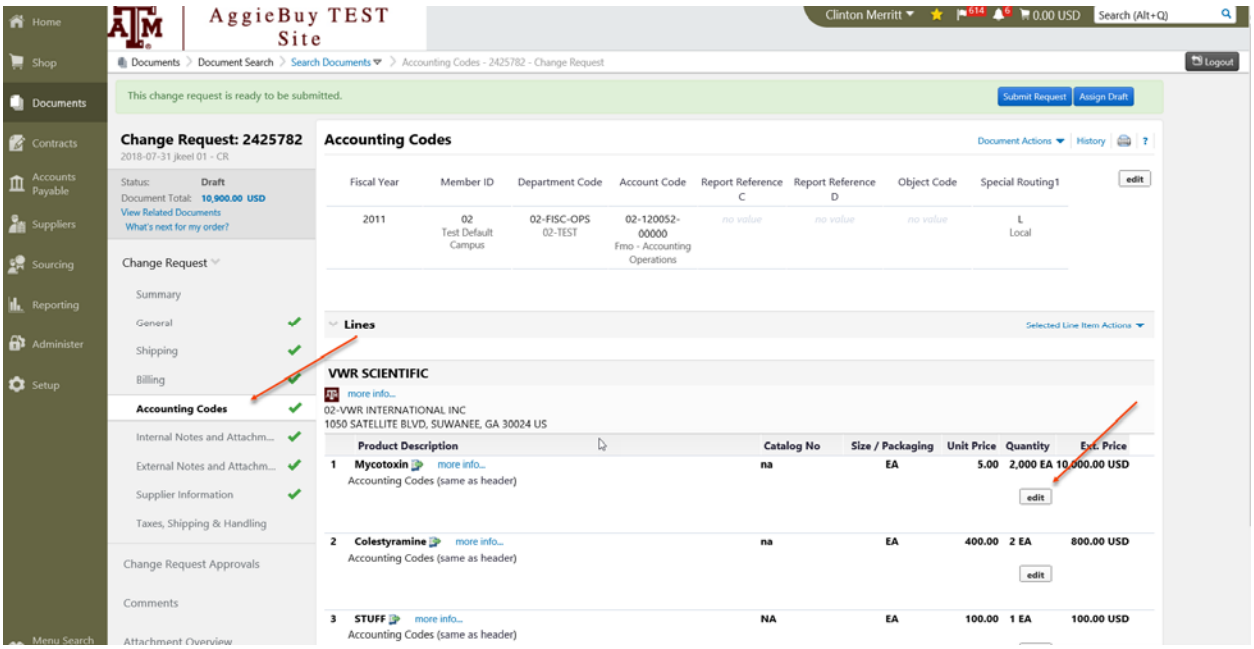


In this example we removed the 06 account (above). Shown below is the new account allocations for this PO at the header level.

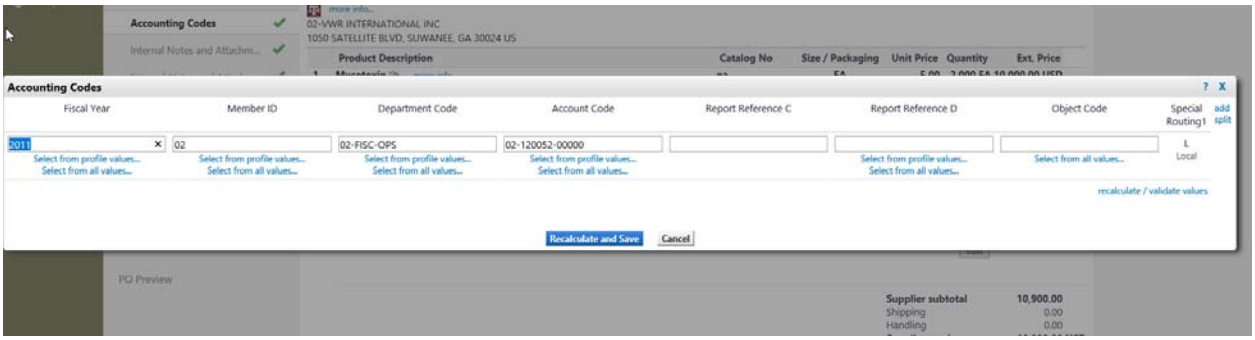


Line Item Level Account Changes

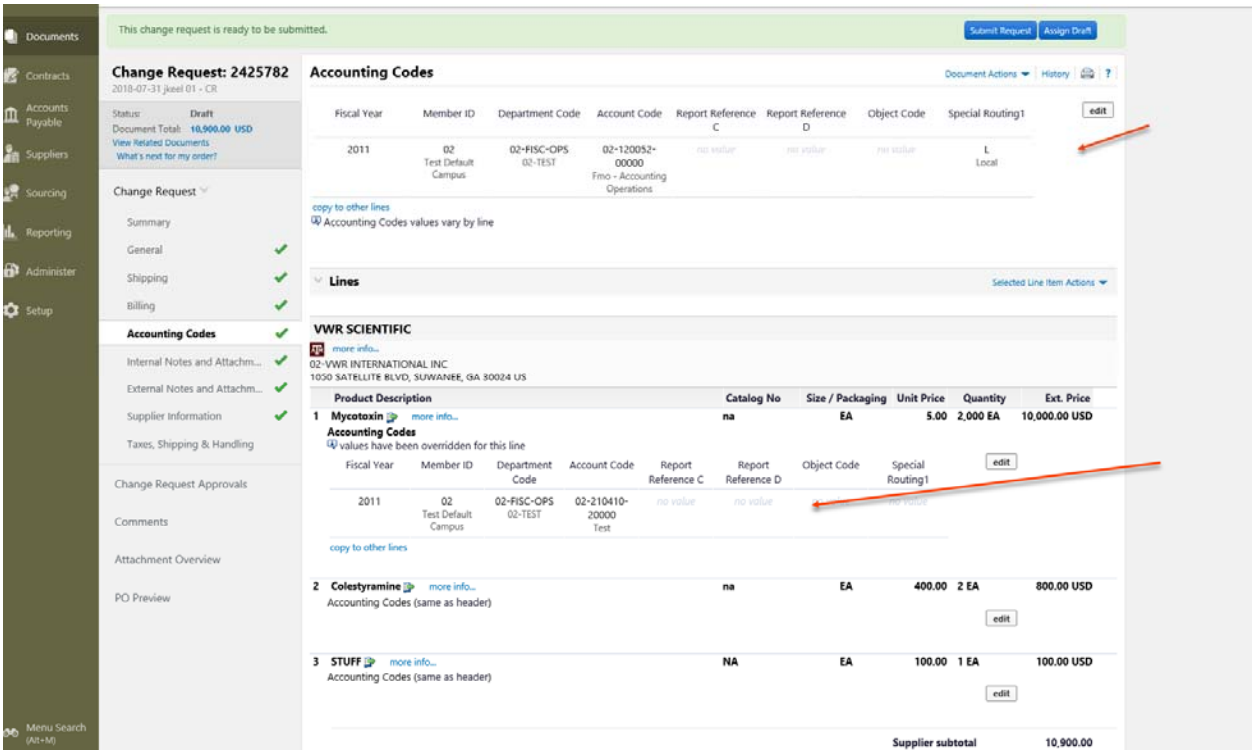
To edit account codes at the line level click on the "Accounting Codes" link shown below. Then for the line that needs a different funding account click on 'edit".



Then edit the account information or add splits just like when creating/editing a requisition.

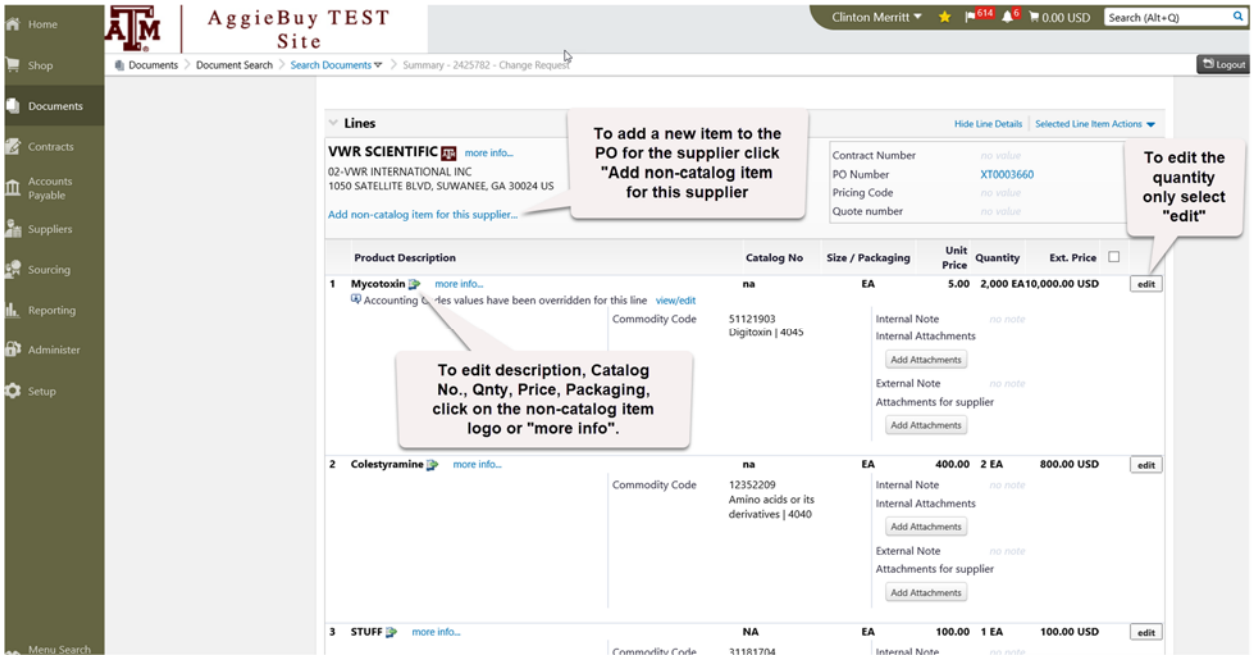


Line 1 now shows a different account at the line level and the other lines are the same as header.

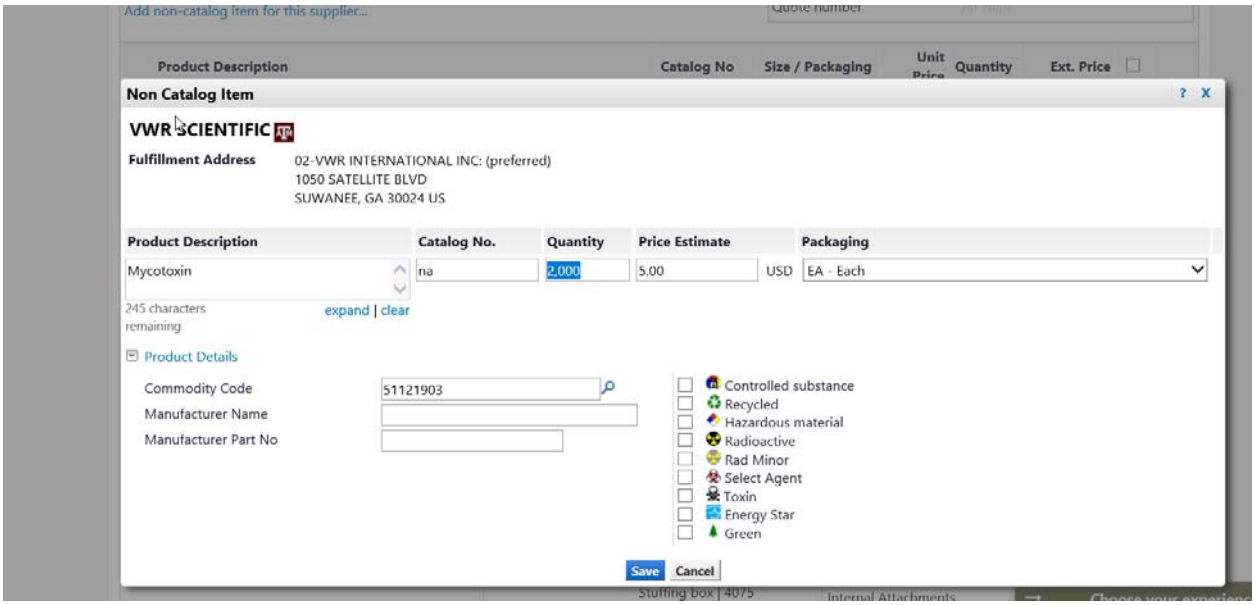


Editing or Adding Items for the Supplier

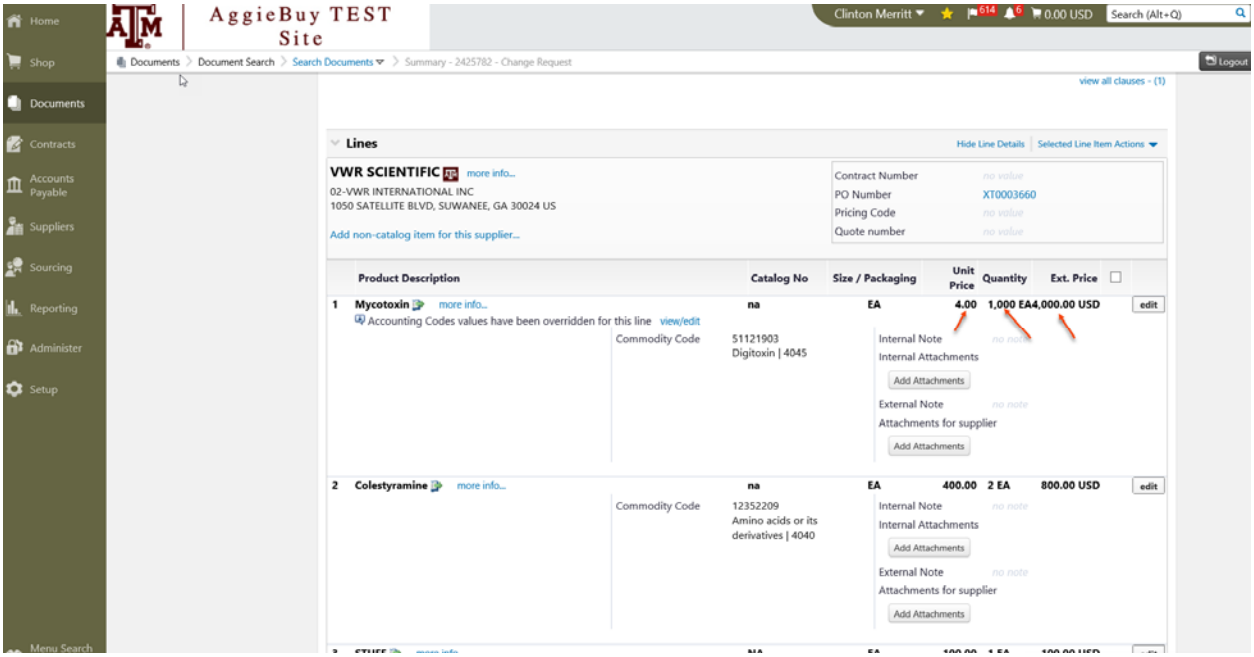
On a change request you can create a new order line, update the quantity only or edit other elements of existing order lines.



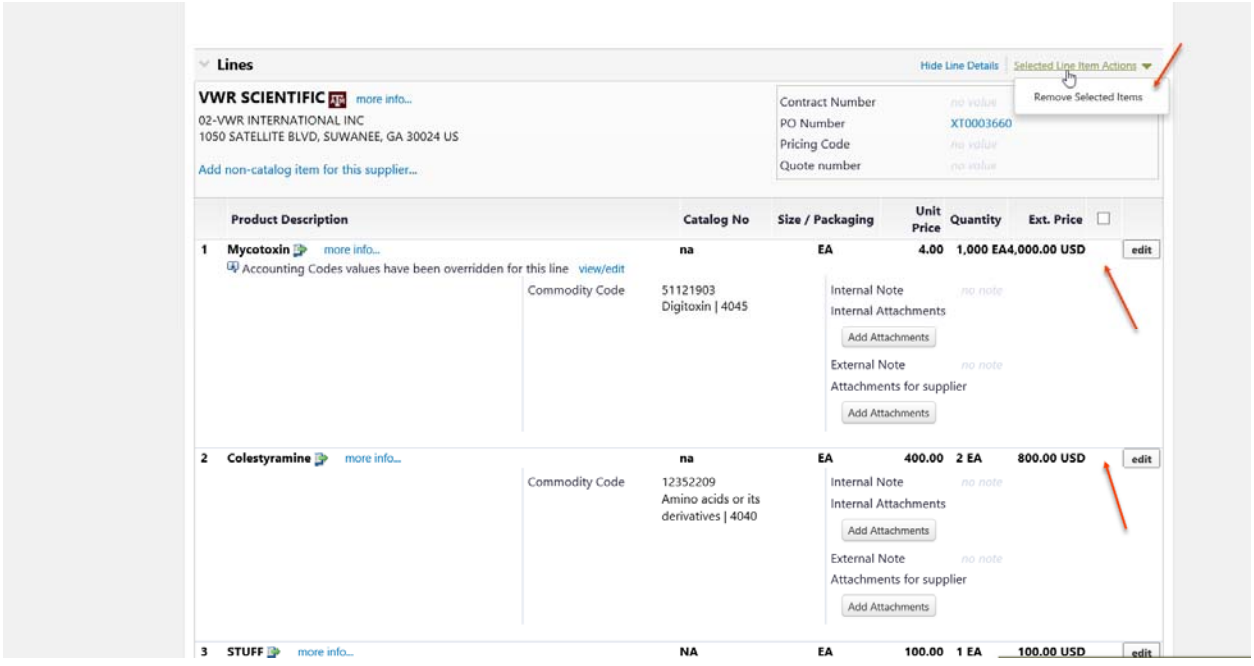
After selecting the non-catalog item description, logo or more info link shown above, you can now edit all of the elements below. We will show lowering the quantity to 1000 and changing the price to $4.00.



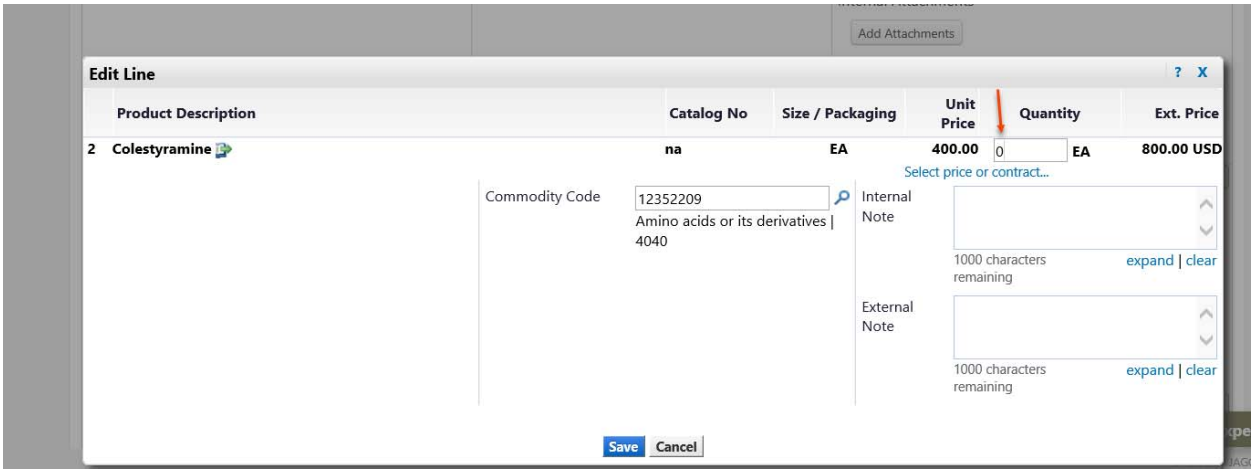
The line has now been updated to order 1000 at $4.



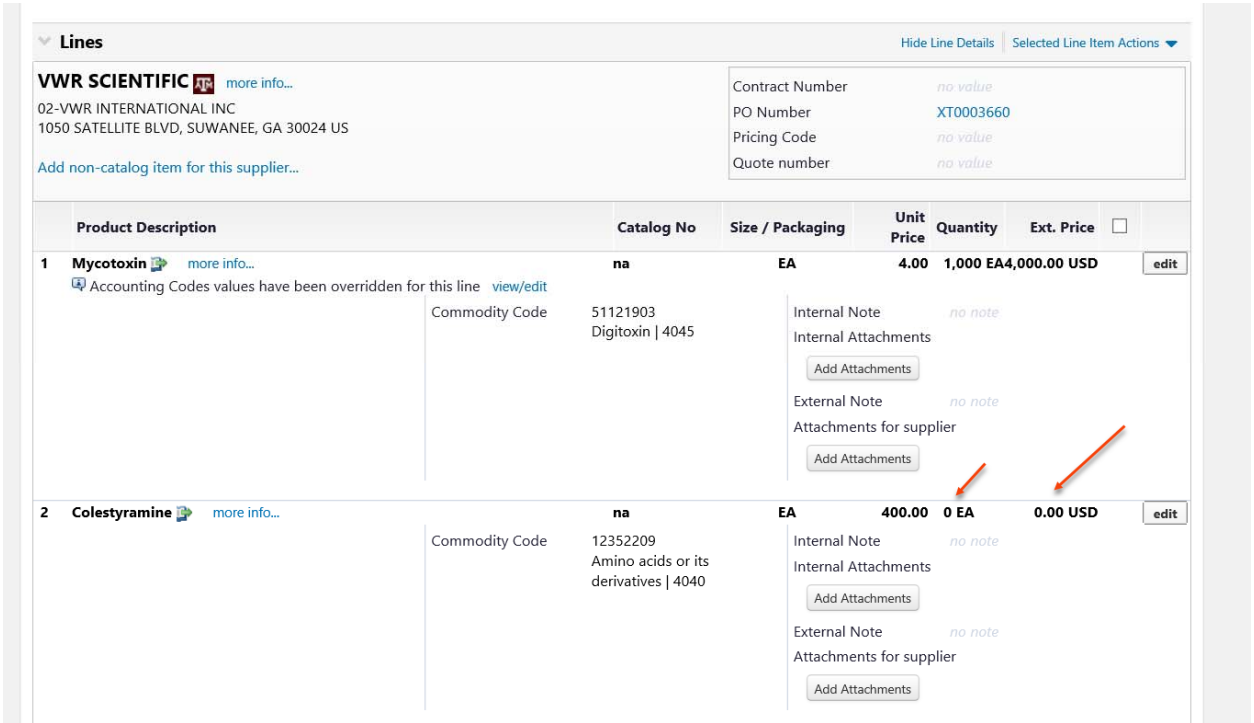
The change request will only allow you to remove a line item that has been added to the existing change request. So if you add a line to the change request and then determine it is not needed you can select the item and the click “Remove Selected Items”. However if the item was already on the PO (as shown below) it will not have a check box next to the item, so it cannot be removed in this manner. To remove the item click on “edit” and then change the quantity to zero.



To remove an existing PO line item on a change request, edit the quantity and input 0. This will replace creating the CANCEL receipt option to cancel items on a purchase order. To cancel the item it should be done as shown below. Same process for items that are partially delivered and the vendor will not be able to fulfill the remaining quantity on the line. Just reduce the quantity to what has or will be received.

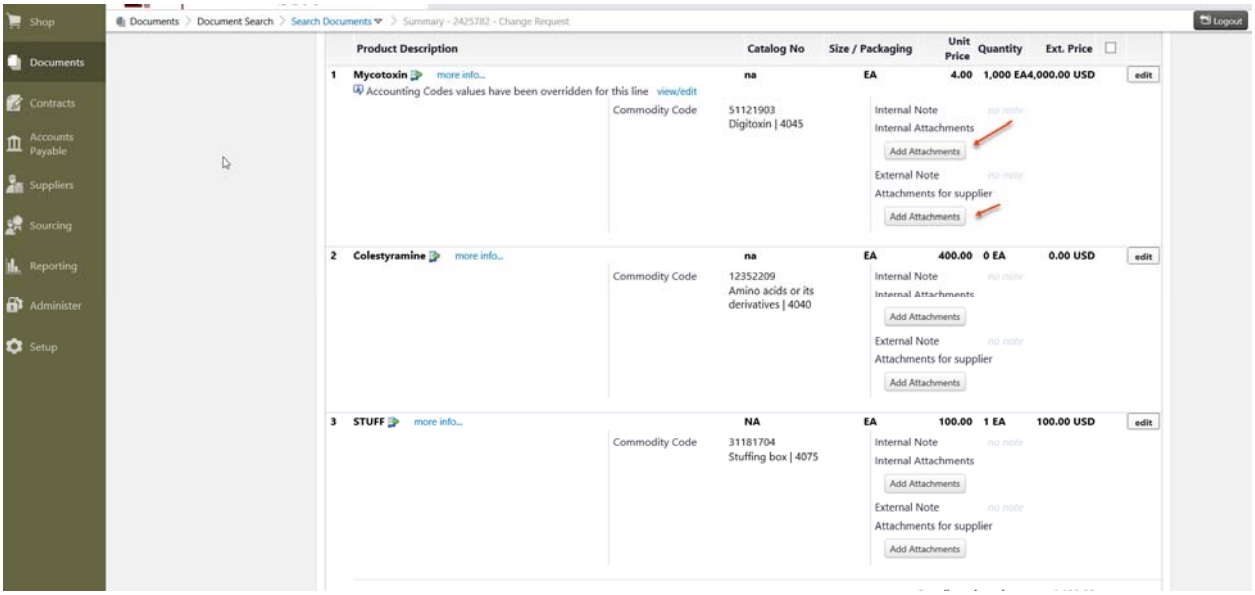


Below shows the quantity adjusted to 0.

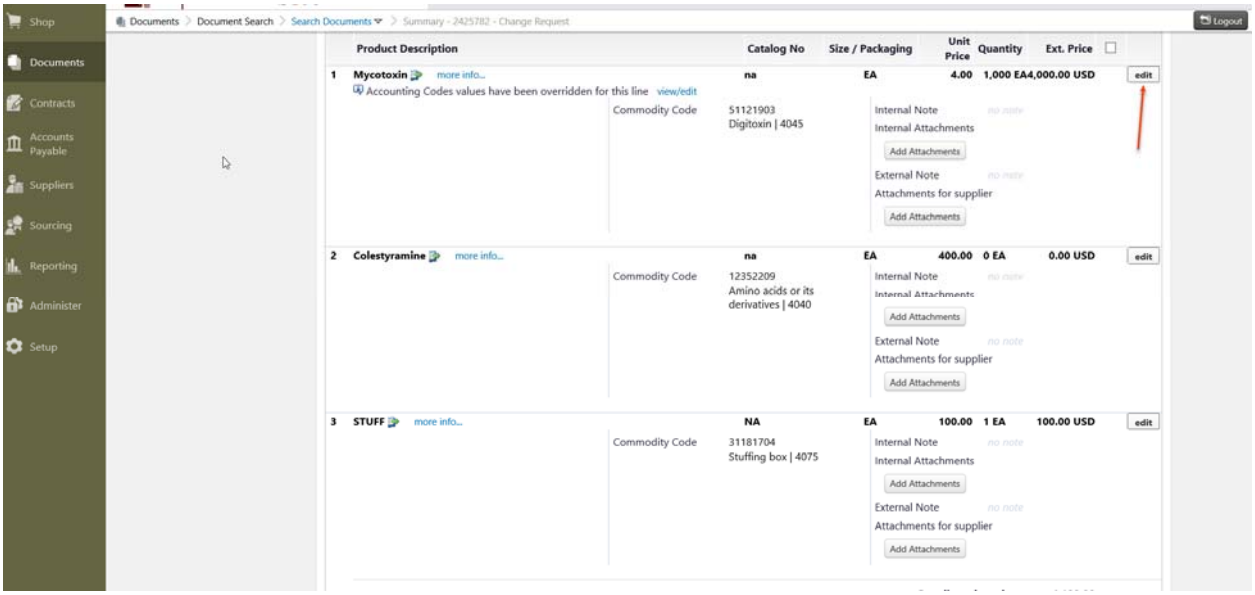


How to add Internal or External Notes or Attachments

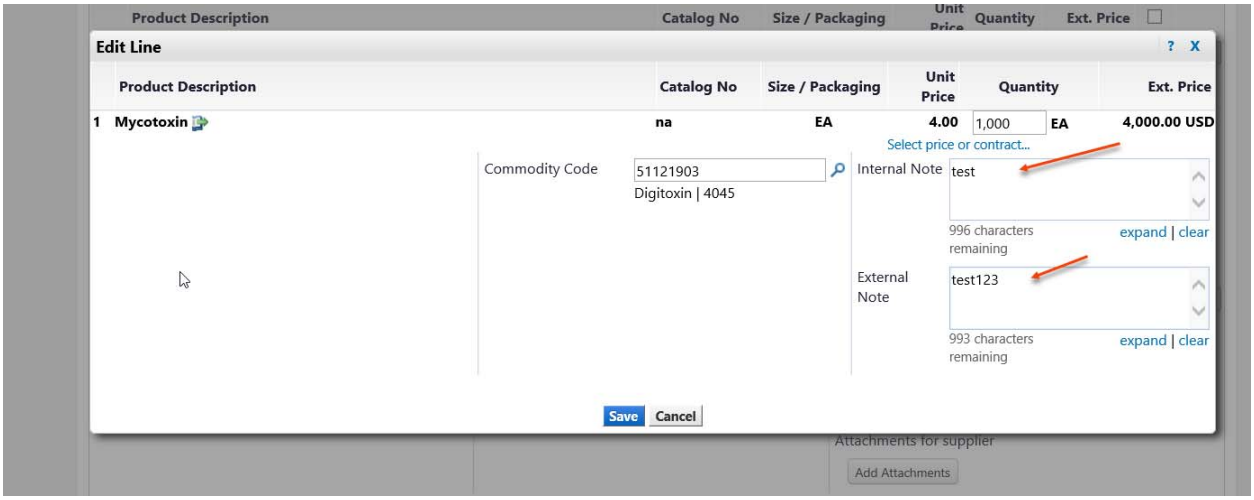
To add external or internal attachments scroll down the summary page to the line items for the supplier. On a change request it does not allow for header level attachments, so this must be done at the line level. Simply click on “Add Attachments” and add the attachment just as is done on all other documents.



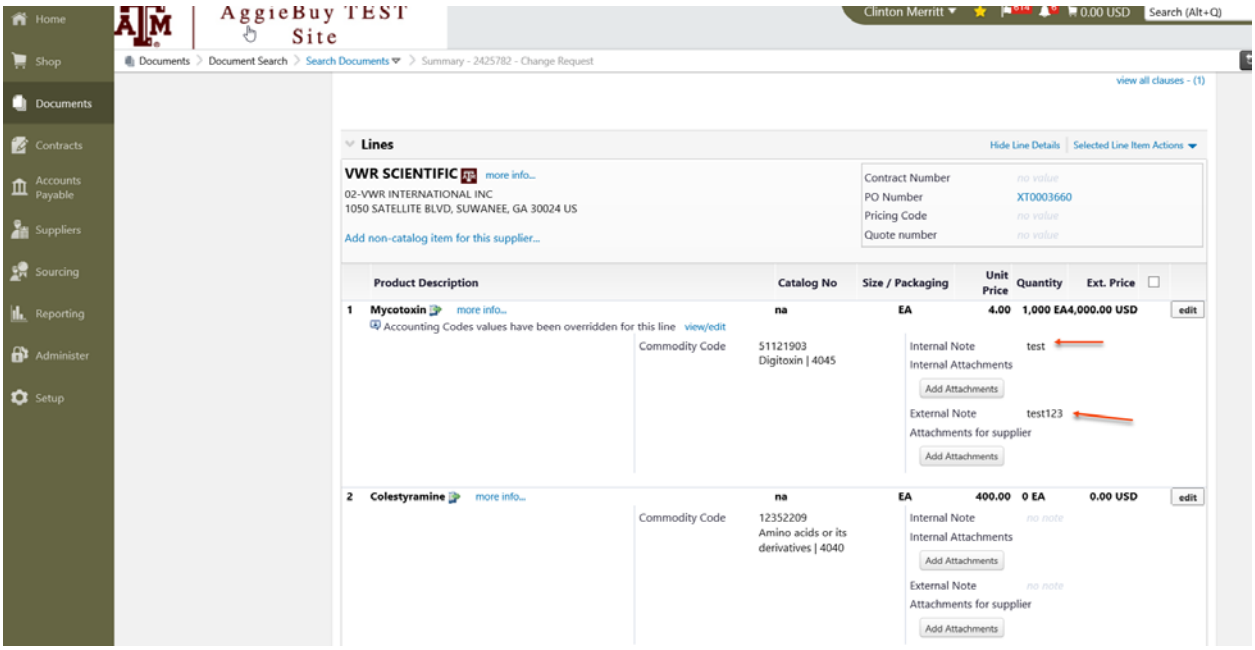
Adding internal or external notes is similar to the attachments is not available to be added at the header level. So to edit the internal or external notes scroll down the page on the summary screen to the line items. Then click edit.



Input the internal or external notes as shown below and then click save.

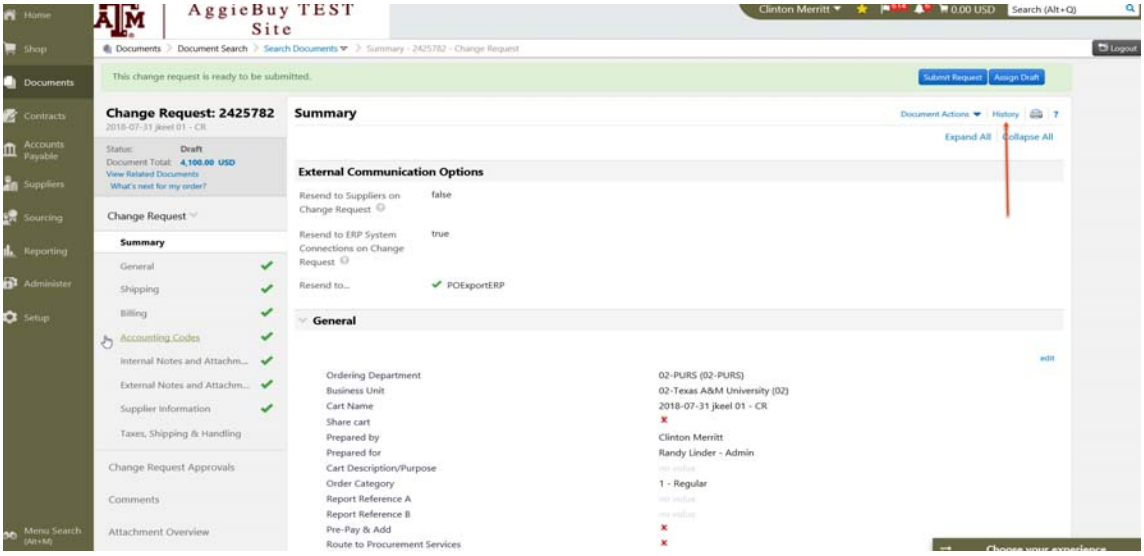


Below shows the notes added to the line item.

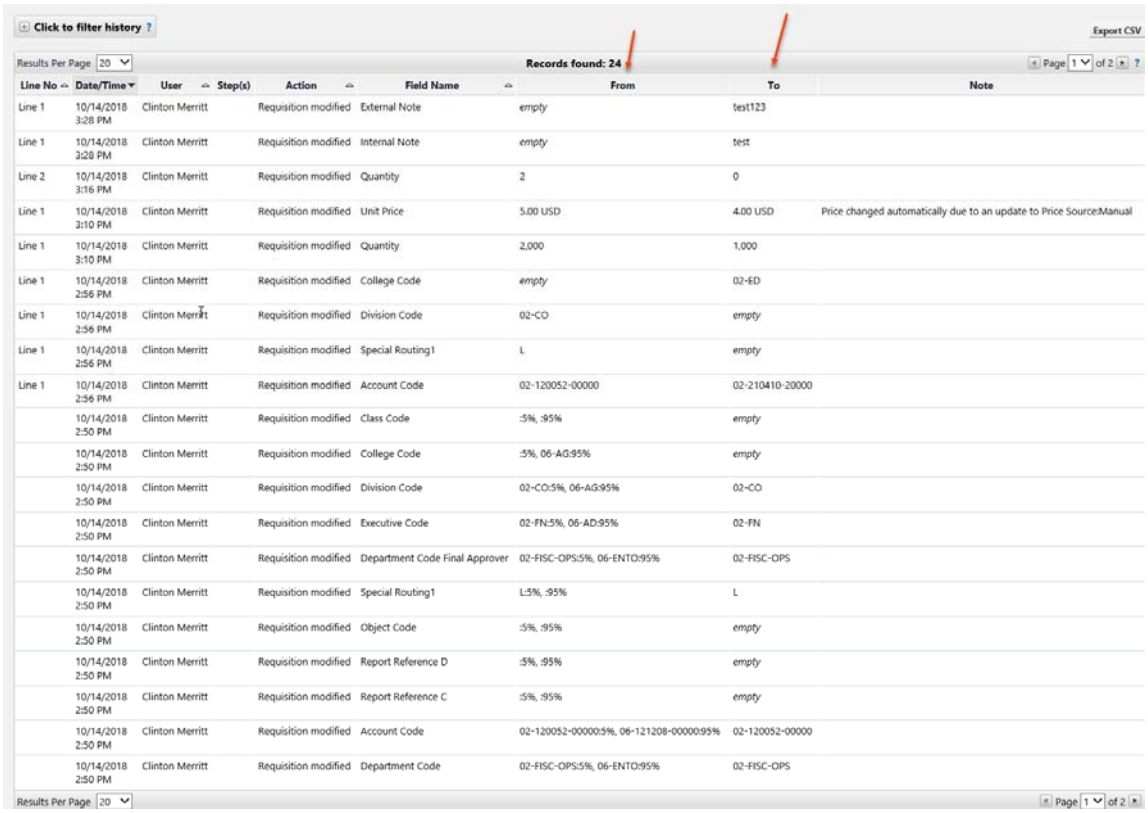


How to View What Has Been Changed/Edited on a Change Request

To review what has been updated/changed/edited on a Change Request click on the “History” link shown below.



The history will show every change. It will show both the previous value and the new value. Approvers will need to use this screen to be able to determine what has changed on a Change Request.



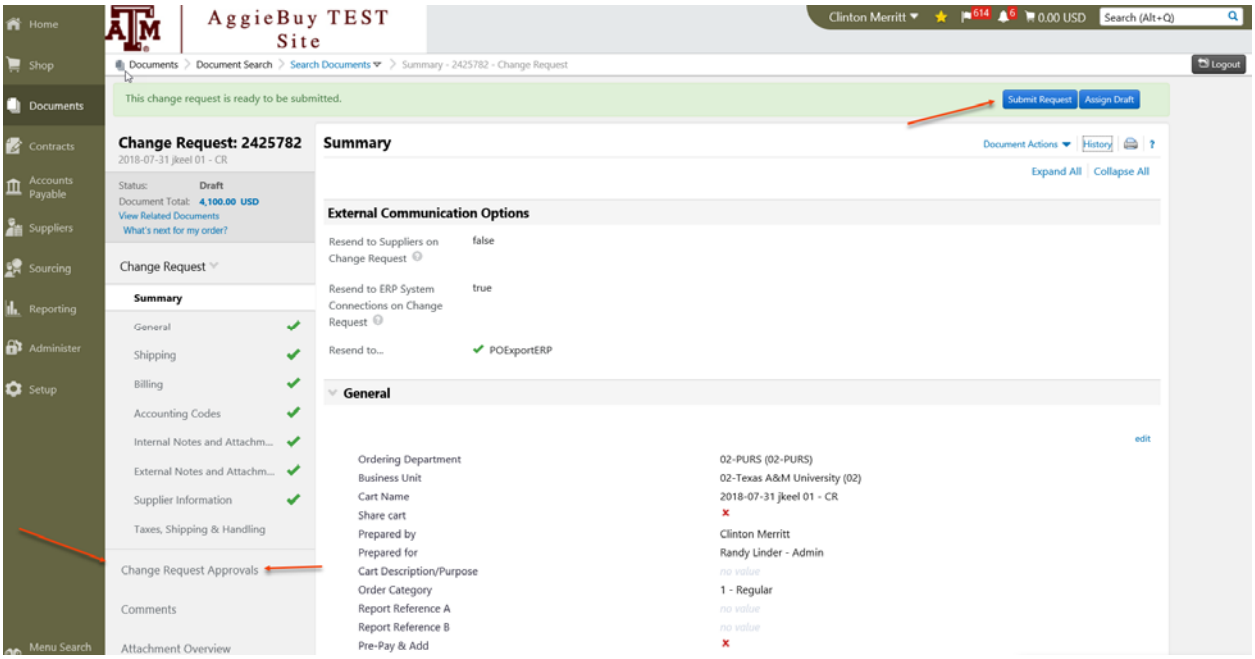
Line No	Date/Time	User	Step(s)	Action	Field Name	From	To	Note
Line 1	10/14/2018 3:28 PM	Clinton Merritt		Requisition modified	External Note	*empty*	test123	
Line 1	10/14/2018 3:28 PM	Clinton Merritt		Requisition modified	Internal Note	*empty*	test	
Line 2	10/14/2018 3:16 PM	Clinton Merritt		Requisition modified	Quantity	2	0	
Line 1	10/14/2018 3:10 PM	Clinton Merritt		Requisition modified	Unit Price	5.00 USD	4.00 USD	Price changed automatically due to an update to Price Source:Manual
Line 1	10/14/2018 3:10 PM	Clinton Merritt		Requisition modified	Quantity	2,000	1,000	
Line 1	10/14/2018 2:56 PM	Clinton Merritt		Requisition modified	College Code	*empty*	02-ED	
Line 1	10/14/2018 2:56 PM	Clinton Merritt		Requisition modified	Division Code	02-CO	*empty*	
Line 1	10/14/2018 2:56 PM	Clinton Merritt		Requisition modified	Special Routing1	L	*empty*	
Line 1	10/14/2018 2:56 PM	Clinton Merritt		Requisition modified	Account Code	02-120052-00000	02-210410-20000	
	10/14/2018 2:50 PM	Clinton Merritt		Requisition modified	Class Code	:5%, :95%	*empty*	
	10/14/2018 2:50 PM	Clinton Merritt		Requisition modified	College Code	:5%, 06-AG:95%	*empty*	
	10/14/2018 2:50 PM	Clinton Merritt		Requisition modified	Division Code	02-CO:5%, 06-AG:95%	02-CO	
	10/14/2018 2:50 PM	Clinton Merritt		Requisition modified	Executive Code	02-FN:5%, 06-AD:95%	02-FN	
	10/14/2018 2:50 PM	Clinton Merritt		Requisition modified	Department Code Final Approver	02-FISC-OPS:5%, 06-ENTO:95%	02-FISC-OPS	
	10/14/2018 2:50 PM	Clinton Merritt		Requisition modified	Special Routing1	L:5%, :95%	L	
	10/14/2018 2:50 PM	Clinton Merritt		Requisition modified	Object Code	:5%, :95%	*empty*	
	10/14/2018 2:50 PM	Clinton Merritt		Requisition modified	Report Reference D	:5%, :95%	*empty*	
	10/14/2018 2:50 PM	Clinton Merritt		Requisition modified	Report Reference C	:5%, :95%	*empty*	
	10/14/2018 2:50 PM	Clinton Merritt		Requisition modified	Account Code	02-120052-00000:5%, 06-121208-00000:95%	02-120052-00000	
	10/14/2018 2:50 PM	Clinton Merritt		Requisition modified	Department Code	02-FISC-OPS:5%, 06-ENTO:95%	02-FISC-OPS	

Results Per Page 20
Page 1 of 2

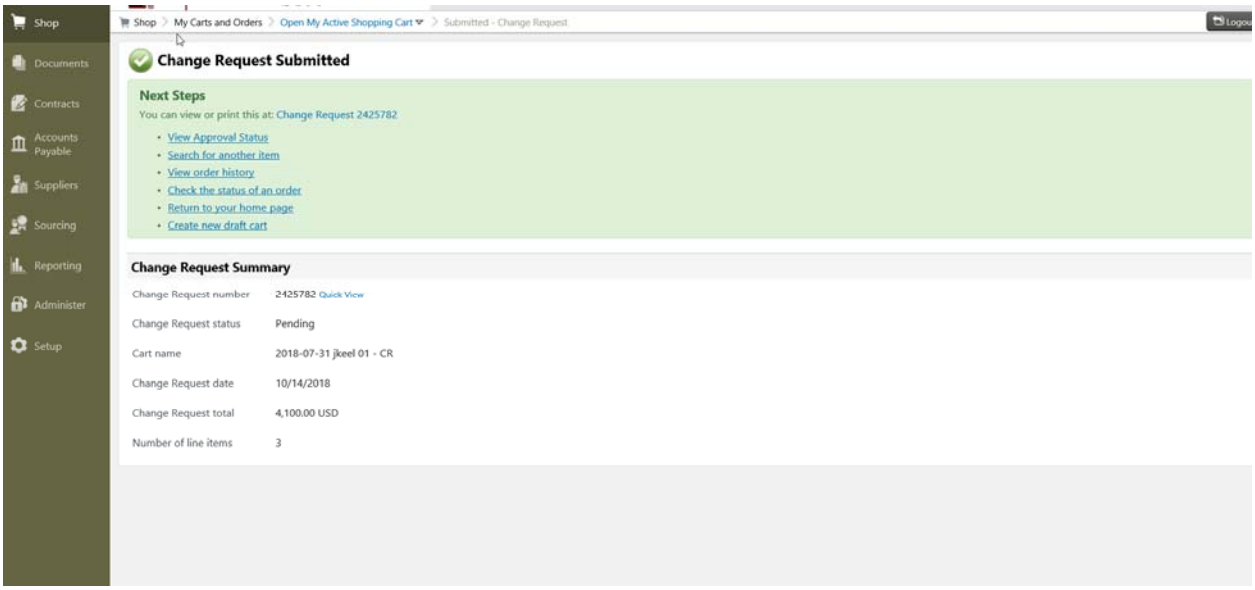
Submitting the Request

After editing the necessary fields, account codes or lines on the request select “Submit Request”.

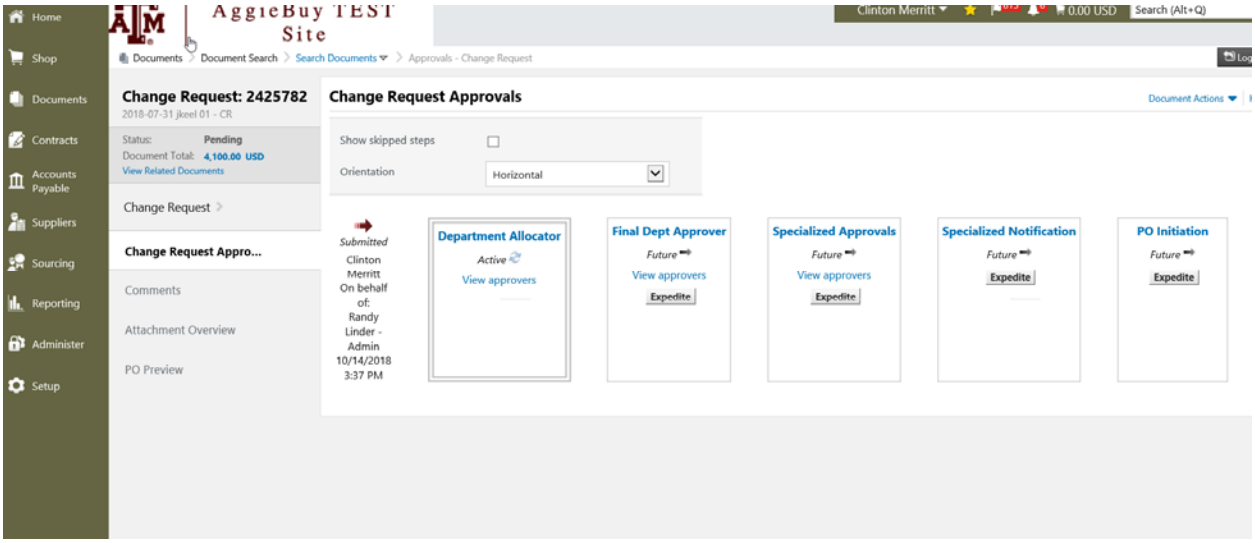
To view the workflow/approval path click on “Change Request Approvals”



Screen showing change request successfully submitted.



Screen showing “Change Request Approvals”.

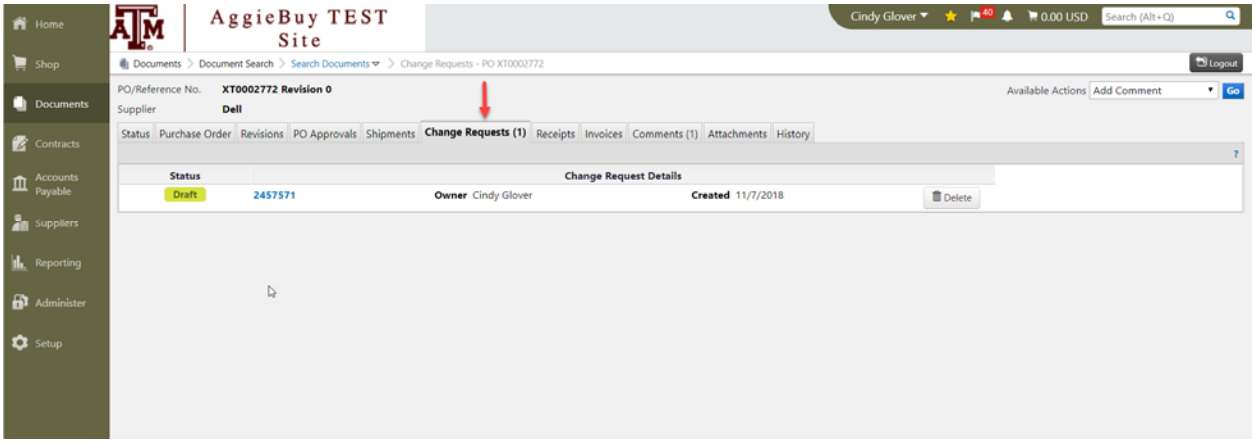


Each change request is approved by Purchasing/AP staff in the Specialized Approvals folder or in the Purchasing Approval steps. During this approval it will be flagged to integrate to FAMIS and determination will be made on if it should be sent to the vendor.

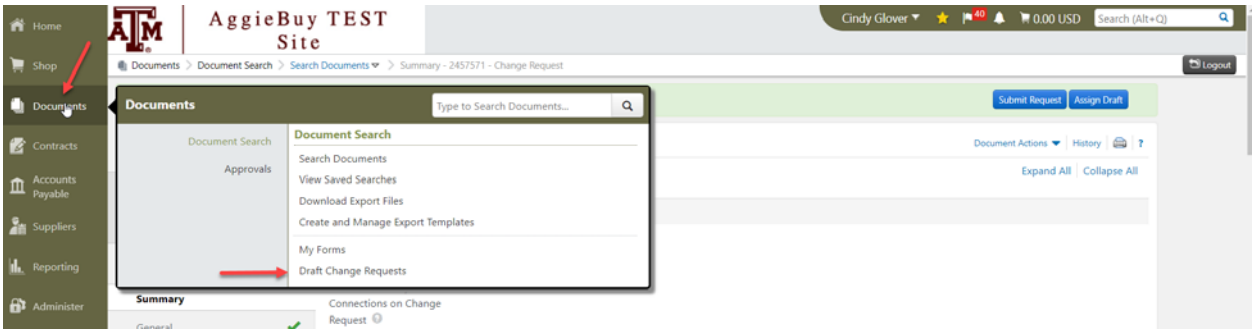
*If you know that the revised purchase needs to be sent to the vendor you can add that in the internal notes (you would only need to add it on one line item). If you add this note then the buyer/AP staff will not need to contact you to find out if the vendor needs a revised purchase order. When the change request is just for accounting purposes you would typically not be asked.

Draft Change Requests

Until you submit the change request it will be a draft. There are two places to see your draft requests. The simplest is to go the change request tab on the purchase order.



If you start a draft request and do not have the purchase order number then you can go to the documents tab and select draft change requests.

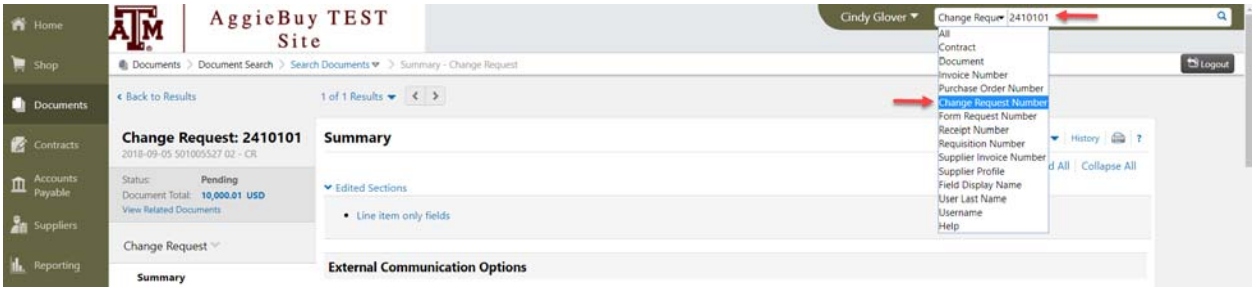


*****There can only be one change request in process at a time. If there is an existing DRAFT or PENDING change request on the purchase order you will not have the option to create a new one.**

How do I locate Change Requests

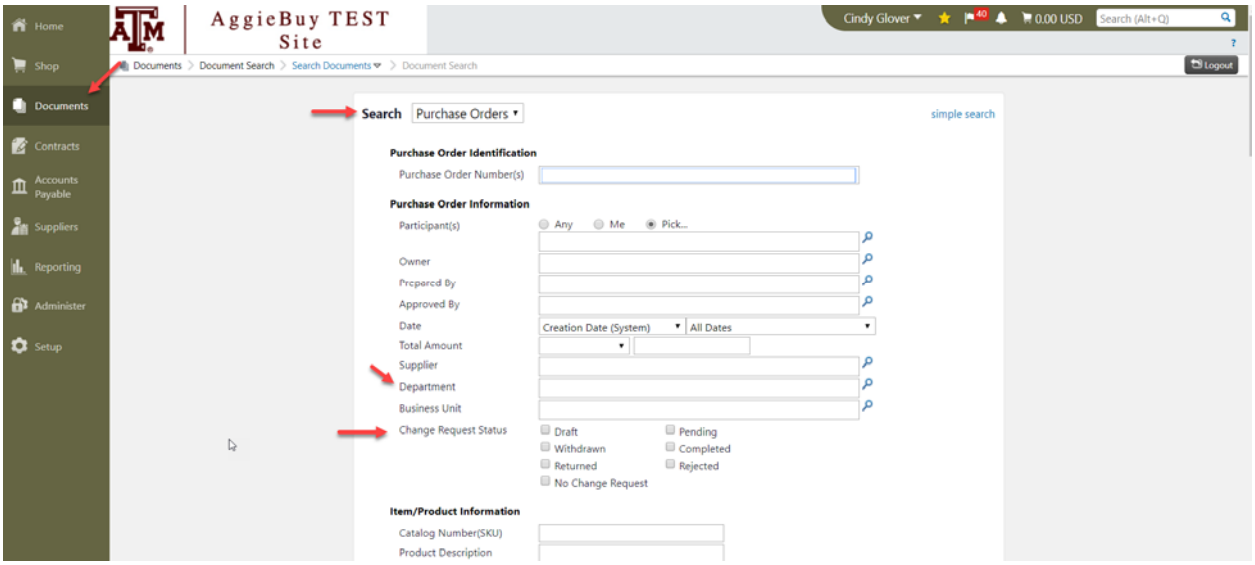
When you have the change request number

In the quick search you can select the change request number and search for the change request number



When you do not have the change request number

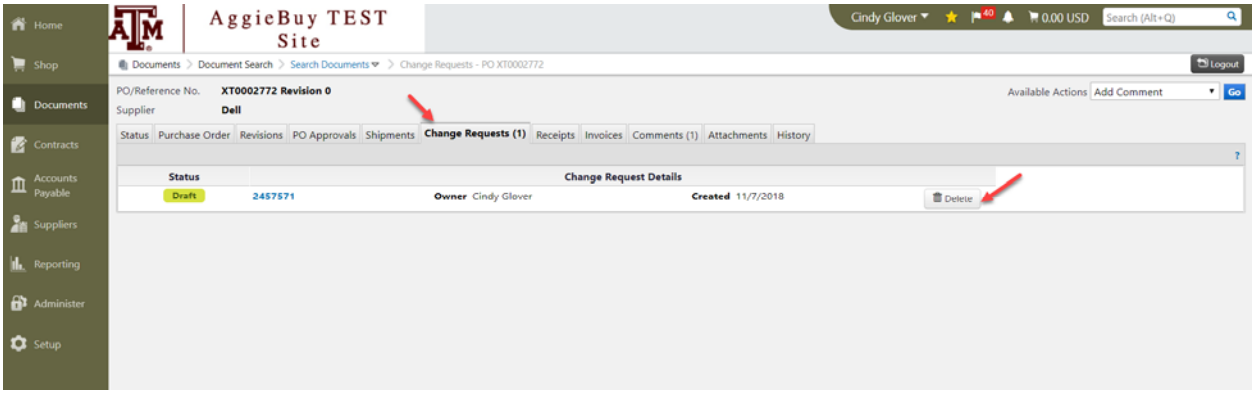
If you do not have the change request number or the purchase order number you can search for purchase orders that have change requests. You would want to include additional items in this search (department code, owner, etc.) to narrow down the results.



How do I cancel/delete a Change Request

Draft (not submitted) Change Request

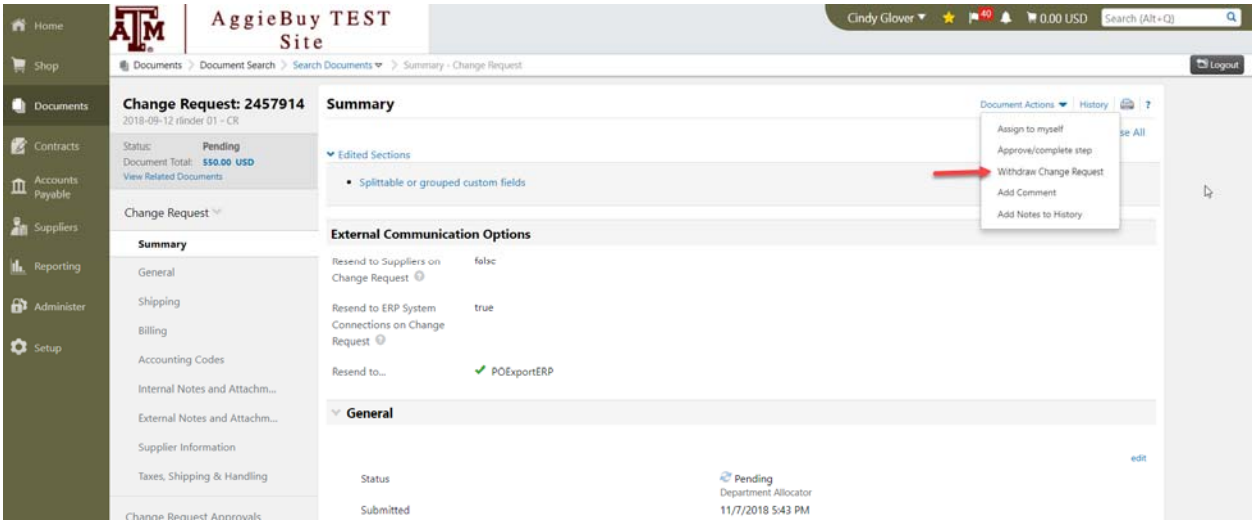
Simply delete it from the change request tab on the purchase order

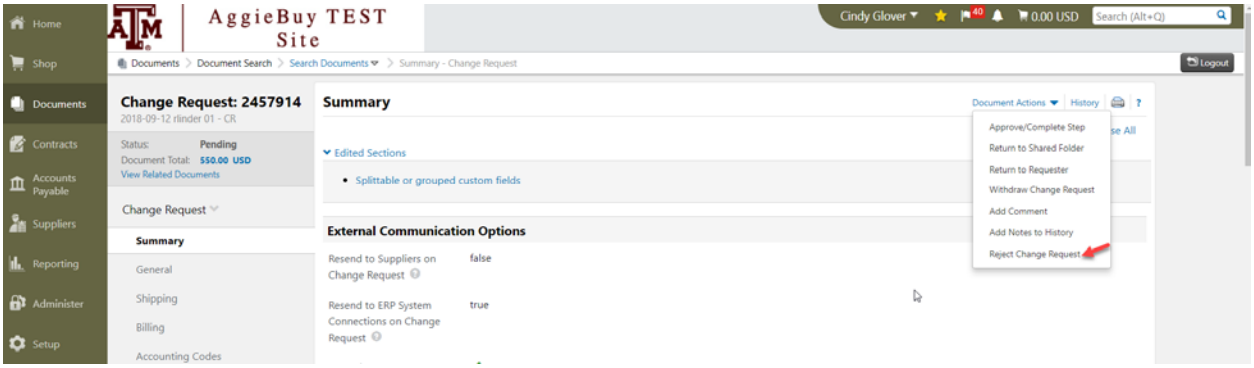


Pending Change Request

Submitted by you

Open the change request and from the document actions select Withdraw Change Request



Submitted by someone else

Contact an approver on the approval step that the change request is in and ask them to reject change request. If the approver is not available then contact your AP/Purchasing office.