

# Change Request Reference Guide

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## 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.

The screenshot shows the AggieBuy TEST Site interface. At the top, there is a search bar and a user profile for Clinton Merritt. The main content area displays a purchase order for VWR SCIENTIFIC, PO Reference No. XT0003660, Revision 0. A callout box highlights the 'Create Change Request' button in the 'Actions' menu. Below the callout, there is a table of line items with columns for Product Description, Catalog No, Size / Packaging, Unit Price, Quantity, Ext. Price, Supplier, Receiving, Invoicing, and Matching. The table shows three line items: Mycotoxin, Colestyramine, and STUFF. The subtotal is 10,900.00.

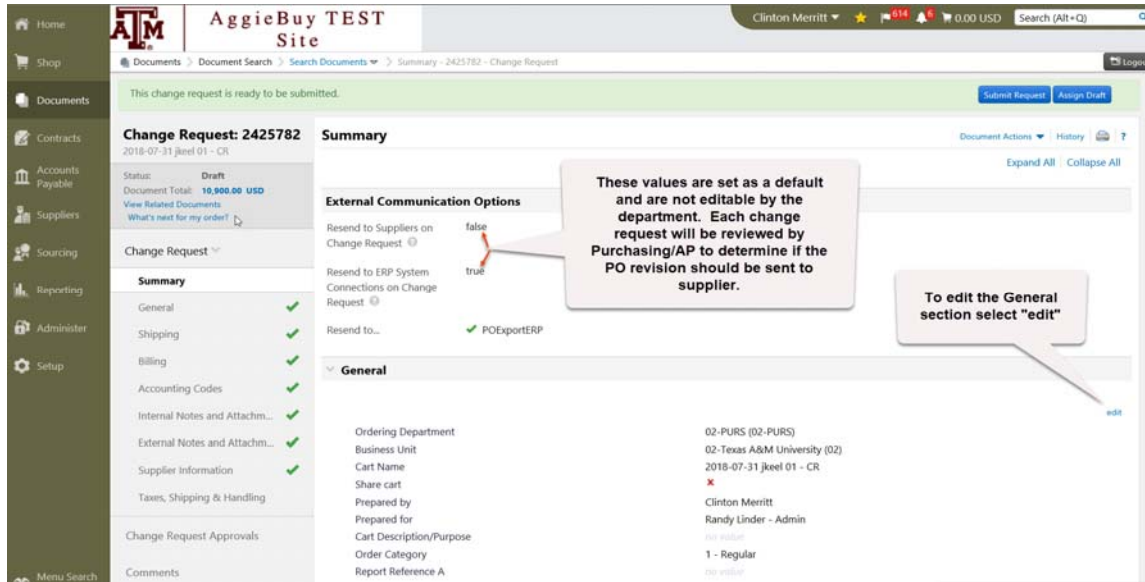
Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	Supplier	Receiving	Invoicing	Matching
1 Mycotoxin	na	EA	5.00	2,000 EA	10,000.00 USD	Sent To Supplier	none	none	No Matches
2 Colestyramine	na	EA	400.00	2 EA	800.00 USD	Sent To Supplier	none	none	No Matches
3 STUFF	NA	EA	100.00	1 EA	100.00 USD	Sent To Supplier	none	none	No Matches

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal: 10,900.00  
Shipping: 0.00

# 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.

The screenshot shows the 'Accounting Codes' section of a change request. A callout box points to an 'edit' button with the text: "Select 'edit' to add splits or update existing values for the header level account codes." The table below shows the current accounting codes:

Fiscal Year	Member ID	Department Code	Account Code	Executive Code	Division Code	College Code	Report Reference C	Report Reference D	Object Code	Class Code	Special Routing1	% of Price
2011	02 Test Default Campus	02-FISC-OPS 02-TEST	02-120052-00000 Fmo - Accounting Operations	02-FN V.P. & Cfo - Finance	02-CO Controller	no value	no value	no value	no value	no value	L Local	5%
2011	06 Texas Agrilife Research	06-ENTO 06-Entomology	06-121208-00000 Fy08 Entomology R&G	06-AD Associate Deputy Chancellor	06-AG College of Ag & Life Sciences	06-AG Agricultural and Life Sciences	no value	no value	no value	no value	no value	95%

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.

The screenshot shows the 'Accounting Codes' dialog box. It contains a table with the following columns: Fiscal Year, Member ID, Department Code, Account Code, Report Reference C, Report Reference D, Object Code, Special Routing1, and % of Price. The dialog also includes a 'Recalculate and Save' button and a 'Cancel' button. The table shows two rows of accounting codes, similar to the ones shown in the previous screenshot.

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

The screenshot shows the 'Accounting Codes' section of a change request. The table below represents the data shown in the interface:

Fiscal Year	Member ID	Department Code	Account Code	Report Reference C	Report Reference D	Object Code	Special Routing 1
2011	02 Test Default Campus	02-FISC-OPS 02-TEST	02-120052-00000 Fmo - Accounting Operations	no value	no value	no value	L Local

## 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’.

The screenshot shows the 'Accounting Codes' section for a change request with three line items. The table below represents the data shown in the interface:

Fiscal Year	Member ID	Department Code	Account Code	Report Reference C	Report Reference D	Object Code	Special Routing 1
2011	02 Test Default Campus	02-FISC-OPS 02-TEST	02-120052-00000 Fmo - Accounting Operations	no value	no value	no value	L Local

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Est. Price
1 Mycotoxin Accounting Codes (same as header)	na	EA	5.00	2,000 EA	10,000.00 USD
2 Colestyramine Accounting Codes (same as header)	na	EA	400.00	2 EA	800.00 USD
3 STUFF Accounting Codes (same as header)	NA	EA	100.00	1 EA	100.00 USD

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

Accounting Codes

Fiscal Year: 2011  
 Member ID: 02  
 Department Code: 02-FISC-OPS  
 Account Code: 02-120052-00000  
 Report Reference C:   
 Report Reference D:   
 Object Code:   
 Special Routing: L Local

Buttons: Recalculate and Save, Cancel

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

Change Request: 2425782

Status: Draft  
 Document Total: 10,900.00 USD

**Accounting Codes**

Fiscal Year	Member ID	Department Code	Account Code	Report Reference C	Report Reference D	Object Code	Special Routing1
2011	02	02-FISC-OPS 02-TEST	02-120052-00000 Fmo - Accounting Operations	no value	no value	no value	L Local

copy to other lines  
 Accounting Codes values vary by line

**Lines**

**VWR SCIENTIFIC**

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Mycotoxin	na	EA	5.00	2,000 EA	10,000.00 USD
2 Colestyramine	na	EA	400.00	2 EA	800.00 USD
3 STUFF	NA	EA	100.00	1 EA	100.00 USD

Supplier subtotal: 10,900.00

## 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.

The screenshot shows the 'AggieBuy TEST Site' interface. The top navigation bar includes 'Home', 'Shop', 'Documents', 'Contracts', 'Accounts Payable', 'Suppliers', 'Sourcing', 'Reporting', 'Administer', and 'Setup'. The main content area displays a table of order lines for 'VWR SCIENTIFIC'. The table has columns for Product Description, Catalog No., Size / Packaging, Unit Price, Quantity, and Ext. Price. Three callout boxes provide instructions: 'To add a new item to the PO for the supplier click "Add non-catalog item for this supplier"', 'To edit the quantity only select "edit"', and 'To edit description, Catalog No., Qnty, Price, Packaging, click on the non-catalog item logo or "more info."'. The table shows three lines: 1. Mycotoxin (Catalog No. na, Unit Price 5.00, Quantity 2,000 EA, Ext. Price 10,000.00 USD), 2. Colestyramine (Catalog No. na, Unit Price 400.00, Quantity 2 EA, Ext. Price 800.00 USD), and 3. STUFF (Catalog No. NA, Unit Price 100.00, Quantity 1 EA, Ext. Price 100.00 USD).

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 screenshot shows the 'Add non-catalog item for this supplier...' dialog box. The 'Non Catalog Item' section is expanded, showing the fulfillment address for VWR Scientific: '02-VWR INTERNATIONAL INC: (preferred), 1050 SATELLITE BLVD, SUWANEE, GA 30024 US'. The 'Product Description' field is set to 'Mycotoxin', 'Catalog No.' is 'na', 'Quantity' is '2,000', 'Price Estimate' is '5.00', and 'Packaging' is 'EA - Each'. The 'Product Details' section includes fields for 'Commodity Code' (51121903), 'Manufacturer Name', and 'Manufacturer Part No.'. A list of hazard and safety flags is visible on the right, including 'Controlled substance', 'Recycled', 'Hazardous material', 'Radioactive', 'Rad Minor', 'Select Agent', 'Toxin', 'Energy Star', and 'Green'. 'Save' and 'Cancel' buttons are at the bottom.

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

Home Shop Documents Contracts Accounts Payable Suppliers Sourcing Reporting Administer Setup

AggieBuy TEST Site

Clinton Merritt 614 0.00 USD Search (Alt+Q)

Documents > Document Search > Search Documents > Summary - 2425782 - Change Request

view all clauses - (1)

**Lines** Hide Line Details Selected Line Item Actions

**VWR SCIENTIFIC** more info...  
02-VWR INTERNATIONAL INC  
1050 SATELLITE BLVD, SUWANEE, GA 30024 US  
Add non-catalog item for this supplier...

Contract Number no value  
PO Number XT0003660  
Pricing Code no value  
Quote number no value

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
1 Mycotoxin more info... Accounting Codes values have been overridden for this line view/edit Commodity Code 51121903 Digitoxin   4045	na	EA	4.00	1,000 EA	4,000.00 USD	edit
2 Colestyramine more info... Commodity Code 12352209 Amino acids or its derivatives   4040	na	EA	400.00	2 EA	800.00 USD	edit

Internal Note no note  
Internal Attachments Add Attachments  
External Note no note  
Attachments for supplier Add Attachments

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.

Home Shop Documents Contracts Accounts Payable Suppliers Sourcing Reporting Administer Setup

AggieBuy TEST Site

Clinton Merritt 614 0.00 USD Search (Alt+Q)

Documents > Document Search > Search Documents > Summary - 2425782 - Change Request

view all clauses - (1)

**Lines** Hide Line Details Selected Line Item Actions

**VWR SCIENTIFIC** more info...  
02-VWR INTERNATIONAL INC  
1050 SATELLITE BLVD, SUWANEE, GA 30024 US  
Add non-catalog item for this supplier...

Contract Number no value  
PO Number XT0003660  
Pricing Code no value  
Quote number no value

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
1 Mycotoxin more info... Accounting Codes values have been overridden for this line view/edit Commodity Code 51121903 Digitoxin   4045	na	EA	4.00	1,000 EA	4,000.00 USD	edit
2 Colestyramine more info... Commodity Code 12352209 Amino acids or its derivatives   4040	na	EA	400.00	2 EA	800.00 USD	edit
3 STUFF more info...	NA	EA	100.00	1 EA	100.00 USD	edit

Internal Note no note  
Internal Attachments Add Attachments  
External Note no note  
Attachments for supplier Add Attachments

Remove Selected Items



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.

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
2 Colestyramine	na	EA	400.00	0 EA	800.00 USD

Commodity Code: 12352209  
Amino acids or its derivatives | 4040

Internal Note: 1000 characters remaining  
External Note: 1000 characters remaining

Buttons: Save, Cancel

Below shows the quantity adjusted to 0.

**VWR SCIENTIFIC** more info...  
02-VWR INTERNATIONAL INC  
1050 SATELLITE BLVD, SUWANEE, GA 30024 US  
Add non-catalog item for this supplier...

Contract Number: no value  
PO Number: XT0003660  
Pricing Code: no value  
Quote number: no value

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Mycotoxin	na	EA	4.00	1,000 EA	4,000.00 USD
2 Colestyramine	na	EA	400.00	0 EA	0.00 USD

Commodity Code for Mycotoxin: 51121903  
Digitoxin | 4045

Commodity Code for Colestyramine: 12352209  
Amino acids or its derivatives | 4040

Buttons: Add Attachments, edit

## 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.

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Mycotoxin Accounting Codes values have been overridden for this line	na	EA	4.00	1,000 EA	4,000.00 USD
2 Colestyramine	na	EA	400.00	0 EA	0.00 USD
3 STUFF	NA	EA	100.00	1 EA	100.00 USD

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.

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Mycotoxin Accounting Codes values have been overridden for this line	na	EA	4.00	1,000 EA	4,000.00 USD
2 Colestyramine	na	EA	400.00	0 EA	0.00 USD
3 STUFF	NA	EA	100.00	1 EA	100.00 USD

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

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Mycotoxin	na	EA	4.00	1,000 EA	4,000.00 USD

Internal Note: test

External Note: test123

Buttons: Save, Cancel

Below shows the notes added to the line item.

AggieBuy TEST Site

Clinton Merritt | 0.00 USD

Documents > Document Search > Search Documents > Summary - 2425782 - Change Request

view all clauses - (1)

Lines

VWR SCIENTIFIC  
02-VWR INTERNATIONAL INC  
1050 SATELLITE BLVD, SUWANEE, GA 30024 US

Contract Number: no value  
PO Number: XT0003660  
Pricing Code: no value  
Quote number: no value

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Mycotoxin	na	EA	4.00	1,000 EA	4,000.00 USD
2 Colestyramine	na	EA	400.00	0 EA	0.00 USD

Internal Note: test

External Note: test123

# 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 screenshot shows the 'Summary' page for Change Request 2425782. The 'History' link is highlighted with a red arrow. The page includes sections for 'External Communication Options' and 'General' information.

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.

Click to filter history ? Export CSV

Results Per Page: 20 Records found: 24 Page 1 of 2

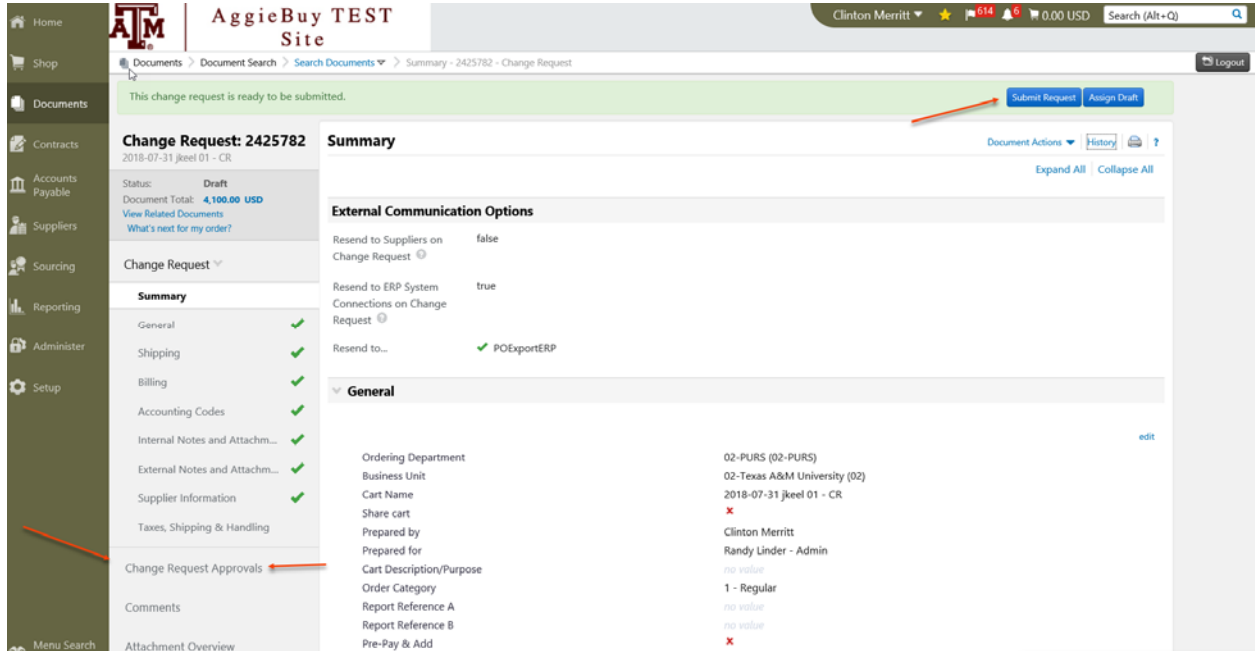
Line No	Date/Time	User	Step(s)	Action	Field Name	From	To	Note
Line 1	10/14/2018 3:28 PM	Clinton Merritt		Requisition modified	External Note	empty	test123	
Line 1	10/14/2018 3:28 PM	Clinton Merritt		Requisition modified	Internal Note	empty	test	
Line 2	10/14/2018 3:16 PM	Clinton Merritt		Requisition modified	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

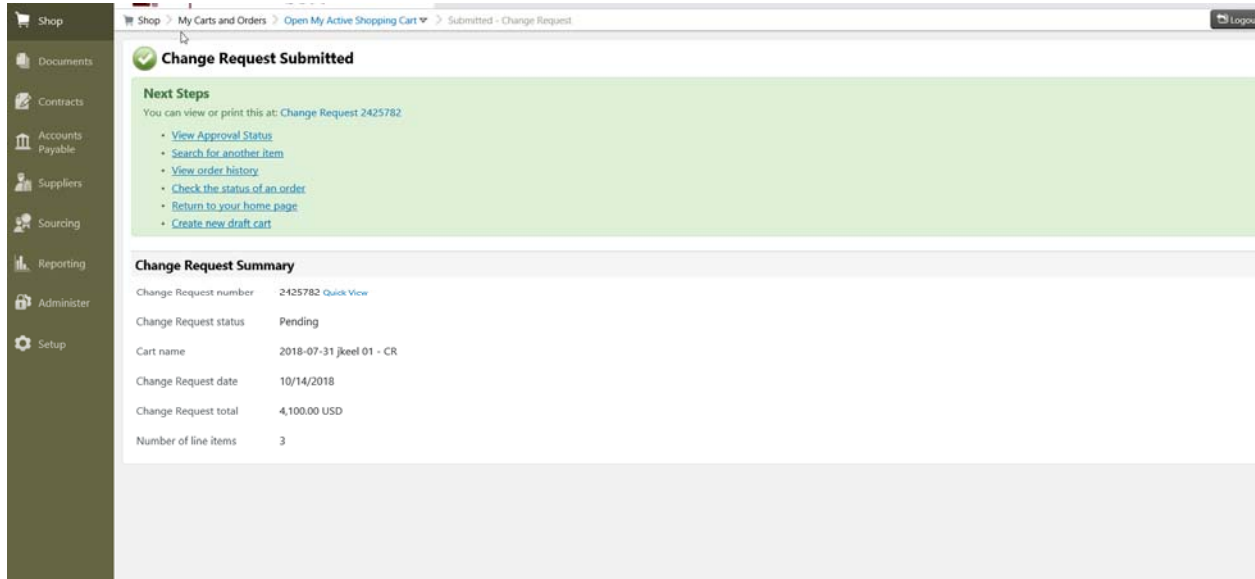
# Submitting the Request

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".

The screenshot displays the 'Change Request Approvals' interface for document 2425782. The status is 'Pending' with a total value of 4,100.00 USD. The document was submitted by Clinton Merritt on 10/14/2018 at 3:37 PM. The interface includes a sidebar with navigation options like Home, Shop, Documents, Contracts, Accounts Payable, Suppliers, Sourcing, Reporting, and Administer. The main content area shows a 'Change Request Approvals' section with a 'Submitted' status and a 'Department Allocator' card that is 'Active'. Other cards include 'Final Dept Approver', 'Specialized Approvals', 'Specialized Notification', and 'PO Initiation', all with 'Future' status and 'Expedite' buttons. A 'Show skipped steps' checkbox and an 'Orientation' dropdown are also visible.

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.

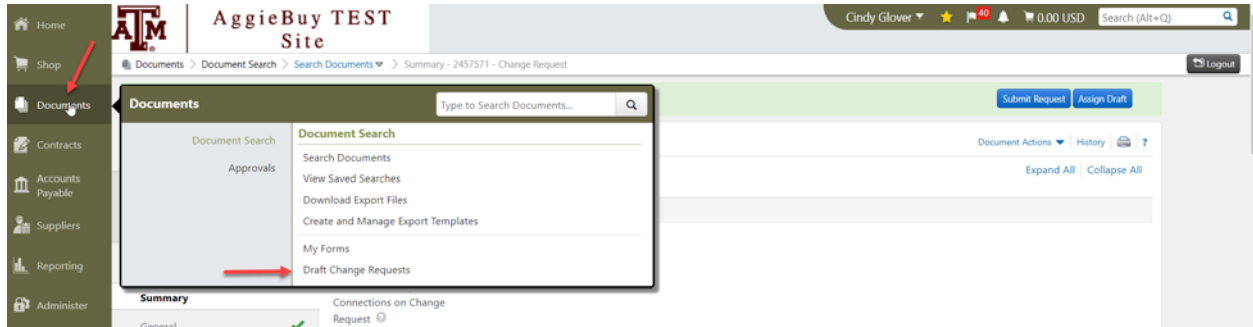
\*If you know that the revised purchase needs to be sent to the vendor you can add that in the internal notes (you would only need to add it on one line item). If you add this note then the buyer/AP staff will not need to contact you to find out if the vendor needs a revised purchase order. When the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

The screenshot shows a purchase order page for PO X10002772, Revision 0, from supplier Dell. A red arrow points to the 'Change Requests (1)' tab. The 'Change Request Details' table shows a draft change request with ID 2457571, owned by Cindy Glover, created on 11/7/2018. The interface includes a sidebar with navigation options and a top navigation bar with user information (Cindy Glover) and search functionality.

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.

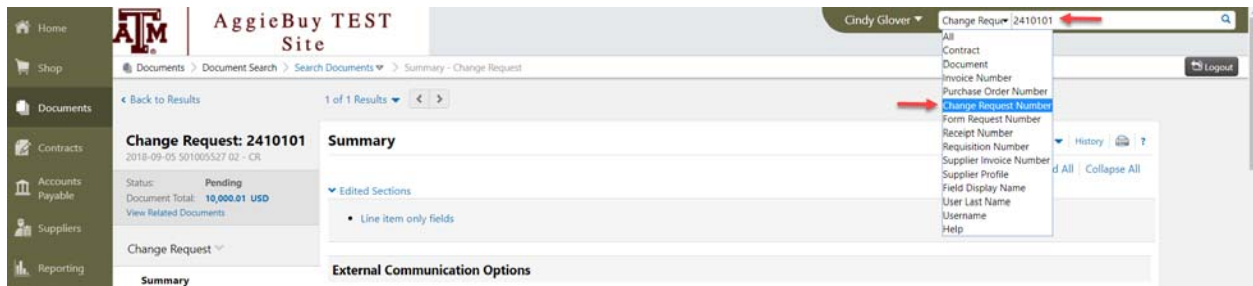


**\*\*\*There can only be one change request in process at a time. If there is an existing DRAFT or PENDING change request on the purchase order you will not have the option to create a new one.**

## 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.

The screenshot shows the 'Purchase Orders' search page in the AggieBuy TEST Site. The left sidebar contains navigation options: Home, Shop, Documents, Contracts, Accounts Payable, Suppliers, Reporting, Administer, and Setup. The main content area is titled 'Search Purchase Orders' and includes a 'simple search' link. The search criteria are organized into sections: 'Purchase Order Identification' with a 'Purchase Order Number(s)' field; 'Purchase Order Information' with fields for 'Participant(s)' (radio buttons for Any, Me, Pick...), 'Owner', 'Prepared By', 'Approved By', 'Date' (with a 'Creation Date (System)' dropdown and 'All Dates' filter), 'Total Amount', 'Supplier', 'Department', and 'Business Unit'; and 'Change Request Status' with checkboxes for Draft, Pending, Withdrawn, Completed, Returned, Rejected, and No Change Request. The 'Item/Product Information' section includes 'Catalog Number(SKU)' and 'Product Description' fields. Red arrows point to the 'Documents' menu item, the 'Purchase Orders' search dropdown, and the 'Change Request Status' section.

## 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

The screenshot shows the 'Change Requests' tab for a purchase order (PO/Reference No. XT0002772 Revision 0) in the AggieBuy TEST Site. The page header includes the site name, user name (Cindy Glover), and search bar. The breadcrumb trail is 'Documents > Document Search > Search Documents > Change Requests - PO XT0002772'. The main content area shows the 'Change Requests (1)' tab selected, with a 'Delete' button highlighted by a red arrow. The 'Change Request Details' table shows a single entry with the following data:

Status	Change Request Number	Owner	Created
Draft	2457571	Cindy Glover	11/7/2018

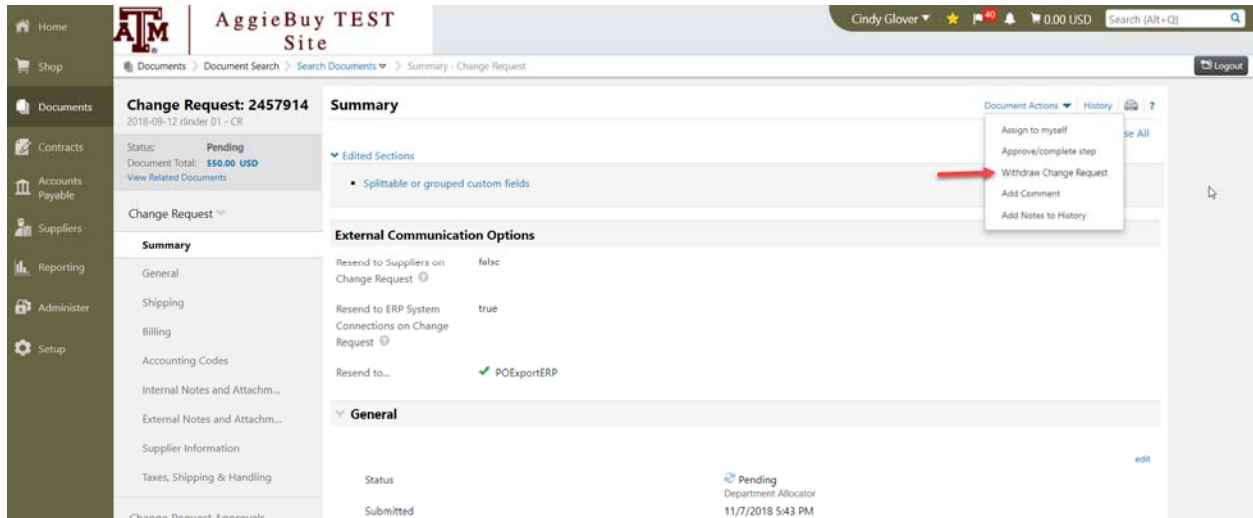
Red arrows point to the 'Change Requests (1)' tab and the 'Delete' button.



# 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.

