

# 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 displays the AggieBuy TEST Site interface. At the top, there is a navigation bar with the site name, user information (Clinton Merritt), and a search bar. Below this, a breadcrumb trail shows the current page: Documents > Document Search > Search Documents > Status - PO: XT0003660. A central callout box reads: "Under available actions on the Purchase Order Select 'Create Change Request' and then 'Go'". The main content area is divided into two sections: "General Information" and "Document Status".

**General Information:**

- PO/Reference No. XT0003660
- Revision No. 0
- Supplier VWR SCIENTIFIC
- Purchase Order Date 8/13/2018
- Total 10,900.00
- Owner Department 02-PURS (02-PURS)
- Owner Business Unit 02-Texas A&M University (02)
- Owner Name Randy Linder - Admin
- Owner Phone +1 979-845-9018
- Owner Email randy-linder@tamu.edu
- Requisition Number 2351110

**Document Status:**

- A/P status Open
- Workflow Completed (8/13/2018 1:41 PM)
- Distribution Fax: +1 770-232-9881
- Distribution Date/Time 8/13/2018 1:41 PM
- Supplier Sent To Supplier

**Line Item Status:**

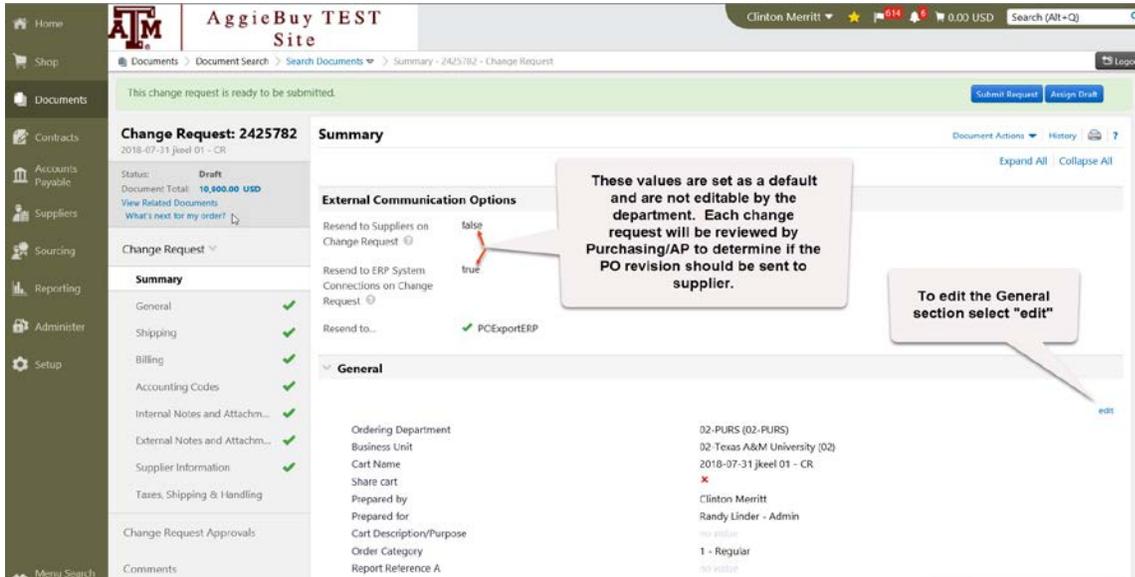
Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	Supplier	Receiving	Invoicing	Matching
1 Mycoloxin	na	EA	5.00	2,000 EA	10,000.00 USD	Sent To Supplier	none	none	No Matches
2 Colestyramine	na	EA	400.00	2 EA	800.00 USD	Sent To Supplier	none	none	No Matches
3 STUFF	NA	EA	100.00	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 'AggieBuy TEST Site' interface. The main content area displays the 'Accounting Codes' section of a change request. A callout box with the text 'Select "edit" to add splits or update existing values for the header level account codes.' points to an 'edit' button located to the right of the table. The table lists accounting codes for two fiscal years: 2011 and 2011. The columns include 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, and % of Price.

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 Fno - Accounting Operations	02-FN VP: & Cto - 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 College of 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 columns for Fiscal Year, Member ID, Department Code, Account Code, Report Reference C, Report Reference D, Object Code, Special Routing1, and % of Price. Each cell in the table has a dropdown menu for selection. The 'Special Routing1' dropdown is currently set to 'L Local'. The '% of Price' column has values of 5 and 95. At the bottom of the dialog, there are buttons for 'Recalculate and Save' and 'Cancel'. A 'Split Total 100%' label is also present.

Fiscal Year	Member ID	Department Code	Account Code	Report Reference C	Report Reference D	Object Code	Special Routing1	% of Price
2011	02	02-FISC-OPS	02-120052-00000				L Local	5
2011	06	06-ENTO	06-121208-00000				no value	95

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

Site

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

State Order Number: no value  
 Non-Compliant: x  
 Basis of Award: no value

**Billing**

**Accounting Codes**

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

**Internal Notes and Attachments**

Internal Note: no value  
 Internal Attachments: Size Attached on

Original Requisition Name: no value  
 Original Requisition Requestor: no value

**External Notes and Attachments**

Note to all Customers: no value

## 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’.

Home | AggieBuy TEST Site | Clinton Merritt | 0.00 USD | Search (Alt+Q)

Documents > Document Search > Search Documents > Accounting Codes - 2425782 - Change Request

This change request is ready to be submitted. Submit Request Assign Draft

**Change Request: 2425782**  
 2018-07-31 joel D1 - CR

Status: Draft  
 Document Total: 10,900.00 USD  
[View Related Documents](#)  
[What's next for my order?](#)

**Change Request**

- Summary
- General ✓
- Shipping ✓
- Billing ✓
- Accounting Codes** ✓
- Internal Notes and Attachm... ✓
- External Notes and Attachm... ✓
- Supplier Information ✓
- Taxes, Shipping & Handling

Change Request Approvals

Comments

Attachment Overview

**Accounting Codes**

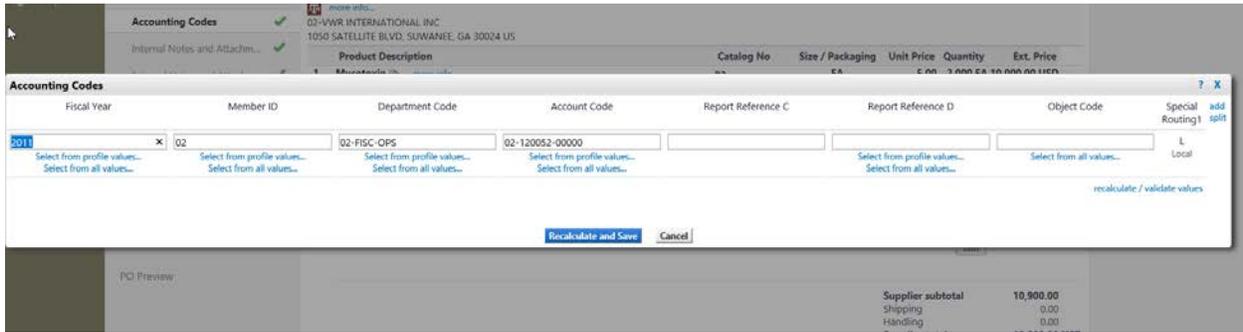
Fiscal Year	Member ID	Department Code	Account Code	Report Reference C	Report Reference D	Object Code	Special Routing 1	edit
2011	02 Test Default Campus	02-FISC-OPS 02-TEST	02-120052-00000 Fmo - Accounting Operations	no value	no value	no value	L Local	

**Lines** Selected Line Item Actions

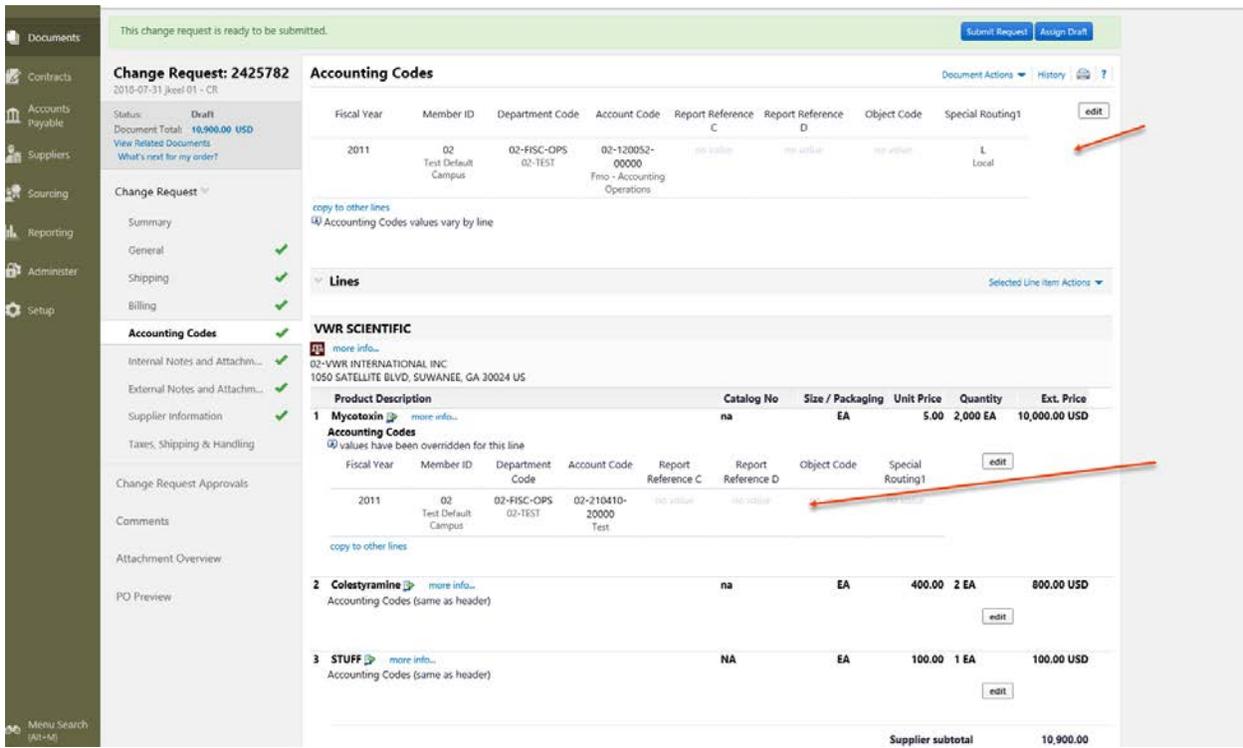
**VWR SCIENTIFIC**  
[more info...](#)  
 02-VWR INTERNATIONAL INC  
 1050 SATELLITE BLVD, SUWANEE, GA 30024 US

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	edit
1 Mycotoxin <a href="#">more info...</a> Accounting Codes (same as header)	na	EA	5.00	2,000 EA	10,000.00 USD	<span style="color: red;">edit</span>
2 Colestyramine <a href="#">more info...</a> Accounting Codes (same as header)	na	EA	400.00	2 EA	800.00 USD	<span style="color: gray;">edit</span>
3 STUFF <a href="#">more info...</a> 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.



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.

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 is titled 'Summary - 2425782 - Change Request' and shows 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 lines are visible: 1. Mycotoxin (na, EA, 5.00, 2,000 EA, 10,000.00 USD), 2. Colestyramine (na, EA, 400.00, 2 EA, 800.00 USD), and 3. STUFF (NA, EA, 100.00, 1 EA, 100.00 USD). Callouts 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".'

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 'Non Catalog Item' edit form. The form is titled 'Non Catalog Item' and includes the supplier name 'VWR SCIENTIFIC' and its fulfillment address: '02-VWR INTERNATIONAL INC: (preferred), 1050 SATELLITE BLVD, SUWANEE, GA 30024 US'. The form has a table for editing item details:

Product Description	Catalog No.	Quantity	Price Estimate	Packaging
Mycotoxin	na	2,000	5.00	USD EA - Each

Below the table, there are fields for 'Product Details': 'Commodity Code' (51121903), 'Manufacturer Name', and 'Manufacturer Part No'. There is also a list of checkboxes for various attributes: 'Controlled substance', 'Recycled', 'Hazardous material', 'Radioactive', 'Rad Minor', 'Select Agent', 'Toxin', 'Energy Star', and 'Green'. The form has 'Save' and 'Cancel' buttons 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 | 514 | 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

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

Add non-catalog item for this supplier...

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
<b>1 Mycotoxin</b> <a href="#">more info...</a> <small>Accounting Codes values have been overridden for this line <a href="#">view/edit</a></small>	na	EA	4.00	1,000 EA	4,000.00 USD	<input type="checkbox"/> <a href="#">edit</a>
Commodity Code: 51121903 Digitoxin   4045						Internal Note: no note Internal Attachments: <a href="#">Add Attachments</a> External Note: no note Attachments for supplier: <a href="#">Add Attachments</a>
<b>2 Colestyramine</b> <a href="#">more info...</a>	na	EA	400.00	2 EA	800.00 USD	<input type="checkbox"/> <a href="#">edit</a>
Commodity Code: 12352209 Amino acids or its derivatives   4040						Internal Note: no note Internal Attachments: <a href="#">Add Attachments</a> External Note: no note Attachments for supplier: <a href="#">Add Attachments</a>

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 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.

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

**VWR SCIENTIFIC** [more info...](#)  
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

Add non-catalog item for this supplier...

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
<b>1 Mycotoxin</b> <a href="#">more info...</a> <small>Accounting Codes values have been overridden for this line <a href="#">view/edit</a></small>	na	EA	4.00	1,000 EA	4,000.00 USD	<input type="checkbox"/> <a href="#">edit</a>
Commodity Code: 51121903 Digitoxin   4045						Internal Note: no note Internal Attachments: <a href="#">Add Attachments</a> External Note: no note Attachments for supplier: <a href="#">Add Attachments</a>
<b>2 Colestyramine</b> <a href="#">more info...</a>	na	EA	400.00	2 EA	800.00 USD	<input type="checkbox"/> <a href="#">edit</a>
Commodity Code: 12352209 Amino acids or its derivatives   4040						Internal Note: no note Internal Attachments: <a href="#">Add Attachments</a> External Note: no note Attachments for supplier: <a href="#">Add Attachments</a>

3 STUFF [more info...](#) NA EA 100.00 1 EA 100.00 USD [edit](#)

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: 51121903  
Digitoxin | 4045

Commodity Code: 12352209  
Amino acids or its derivatives | 4040

Buttons: Add Attachments (Internal, External, Supplier)

## 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 <a href="#">more info...</a> <small>Accounting Codes values have been overridden for this line <a href="#">view/edit</a></small>	na	EA	4.00	1,000 EA	4,000.00 USD	<a href="#">edit</a>
Commodity Code	51121903 Digitoxin   4045	Internal Note <small>(0)</small> <a href="#">view</a>	Internal Attachments <small>(0)</small> <a href="#">view</a>	External Note <small>(0)</small> <a href="#">view</a>	Attachments for supplier <small>(0)</small> <a href="#">view</a>	
		<a href="#">Add Attachments</a>				
2 Colestyramine <a href="#">more info...</a>	na	EA	400.00	0 EA	0.00 USD	<a href="#">edit</a>
Commodity Code	12352209 Amino acids or its derivatives   4040	Internal Note <small>(0)</small> <a href="#">view</a>	Internal Attachments <small>(0)</small> <a href="#">view</a>	External Note <small>(0)</small> <a href="#">view</a>	Attachments for supplier <small>(0)</small> <a href="#">view</a>	
		<a href="#">Add Attachments</a>				
3 STUFF <a href="#">more info...</a>	NA	EA	100.00	1 EA	100.00 USD	<a href="#">edit</a>
Commodity Code	31181704 Stuffing box   4075	Internal Note <small>(0)</small> <a href="#">view</a>	Internal Attachments <small>(0)</small> <a href="#">view</a>	External Note <small>(0)</small> <a href="#">view</a>	Attachments for supplier <small>(0)</small> <a href="#">view</a>	
		<a href="#">Add Attachments</a>				

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 <a href="#">more info...</a> <small>Accounting Codes values have been overridden for this line <a href="#">view/edit</a></small>	na	EA	4.00	1,000 EA	4,000.00 USD	<a href="#">edit</a>
Commodity Code	51121903 Digitoxin   4045	Internal Note <small>(0)</small> <a href="#">view</a>	Internal Attachments <small>(0)</small> <a href="#">view</a>	External Note <small>(0)</small> <a href="#">view</a>	Attachments for supplier <small>(0)</small> <a href="#">view</a>	
		<a href="#">Add Attachments</a>				
2 Colestyramine <a href="#">more info...</a>	na	EA	400.00	0 EA	0.00 USD	<a href="#">edit</a>
Commodity Code	12352209 Amino acids or its derivatives   4040	Internal Note <small>(0)</small> <a href="#">view</a>	Internal Attachments <small>(0)</small> <a href="#">view</a>	External Note <small>(0)</small> <a href="#">view</a>	Attachments for supplier <small>(0)</small> <a href="#">view</a>	
		<a href="#">Add Attachments</a>				
3 STUFF <a href="#">more info...</a>	NA	EA	100.00	1 EA	100.00 USD	<a href="#">edit</a>
Commodity Code	31181704 Stuffing box   4075	Internal Note <small>(0)</small> <a href="#">view</a>	Internal Attachments <small>(0)</small> <a href="#">view</a>	External Note <small>(0)</small> <a href="#">view</a>	Attachments for supplier <small>(0)</small> <a href="#">view</a>	
		<a href="#">Add Attachments</a>				

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

Summary - 2425782 - Change Request

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 displays the 'Change Request: 2425782' page. On the left is a navigation sidebar with options like Home, Shop, Documents, Contracts, Accounts Payable, Suppliers, Sourcing, Reporting, Administer, and Setup. The main content area is divided into a 'Summary' section on the left and a 'General' section on the right. The 'Summary' section includes 'Status: Draft', 'Document Total: 4,100.00 USD', and a list of categories with checkmarks. The 'General' section contains fields for 'Ordering Department', 'Business Unit', 'Cart Name', 'Share cart', 'Prepared by', 'Prepared for', 'Cart Description/Purpose', 'Order Category', 'Report Reference A', 'Report Reference B', 'Pre-Pay & Add', and 'Route to Procurement Services'. A 'Document Actions' menu in the top right contains a 'History' link, which is highlighted by a red arrow.

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.

The screenshot shows a table titled 'Click to filter history?' with 24 records. The table has columns for Line No, Date/Time, User, Action, Field Name, From, To, and Note. The 'From' and 'To' columns are highlighted with red arrows. The table shows various changes made by Clinton Merritt on 10/14/2018, including modifications to External Note, Internal Note, Quantity, Unit Price, College Code, Division Code, Special Routing1, Account Code, Class Code, Executive Code, Department Code, and Report Reference C and D.

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 2:30 PM	Clinton Merritt		Requisition modified	Division Code	02-CO-5%, 06-AG-95%	02-CO	
	10/14/2018 2:30 PM	Clinton Merritt		Requisition modified	Executive Code	02-FN-5%, 06-AD-85%	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	L5%, -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	

## 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”

The screenshot shows the AggieBuy TEST Site interface. The top header displays the user's name, Clinton Merritt, and a balance of 0.00 USD. The main content area is titled "Change Request: 2425782" and shows a "Draft" status with a total of 4,100.00 USD. A green banner at the top indicates "This change request is ready to be submitted." and features a "Submit Request" button highlighted with a red arrow. The left sidebar contains a "Change Request Approvals" link, also highlighted with a red arrow. The main content area includes sections for "External Communication Options" and "General" information.

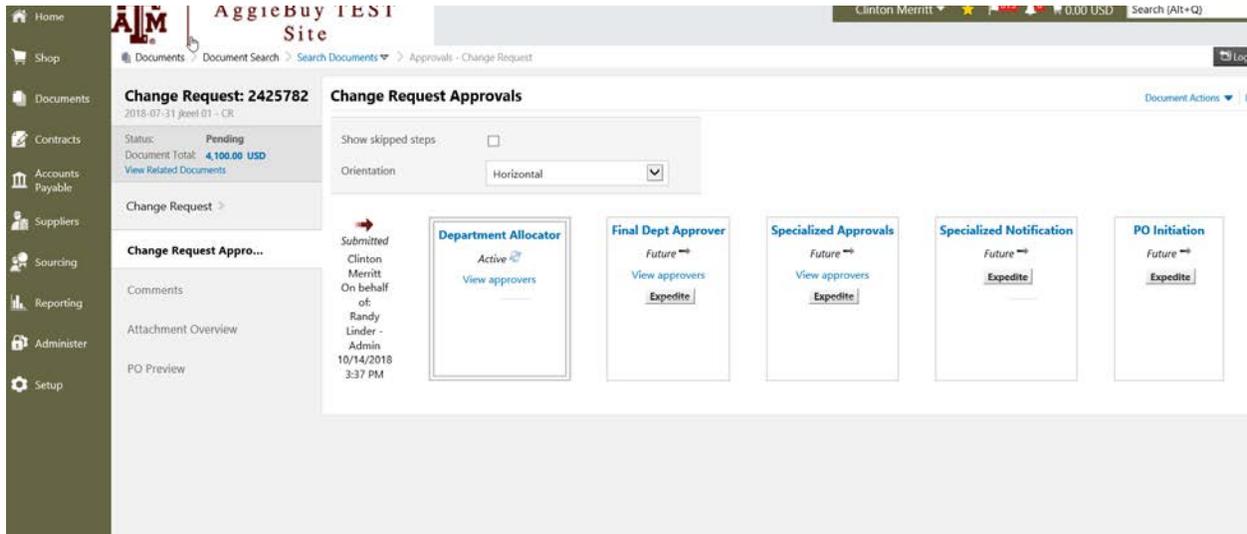
Field	Value
Resend to Suppliers on Change Request	false
Resend to ERP System Connections on Change Request	true
Resend to...	POExportERP
Ordering Department	02-PURS (02-PURS)
Business Unit	02-Texas A&M University (02)
Cart Name	2018-07-31 jkeel 01 - CR
Share cart	X
Prepared by	Clinton Merritt
Prepared for	Randy Linder - Admin
Cart Description/Purpose	no value
Order Category	1 - Regular
Report Reference A	no value
Report Reference B	no value
Pre-Pay & Add	X

Screen showing change request successfully submitted.

The screenshot shows the "Change Request Submitted" confirmation page. A green banner at the top contains a checkmark and the text "Change Request Submitted". Below this, a "Next Steps" section provides links for "View Approval Status", "Search for another item", "View order history", "Check the status of an order", "Return to your home page", and "Create new draft cart". The "Change Request Summary" section provides the following details:

Field	Value
Change Request number	2425782 <a href="#">Quick View</a>
Change Request status	Pending
Cart name	2018-07-31 jkeel 01 - CR
Change Request date	10/14/2018
Change Request total	4,100.00 USD
Number of line items	3

Screen showing "Change Request Approvals".

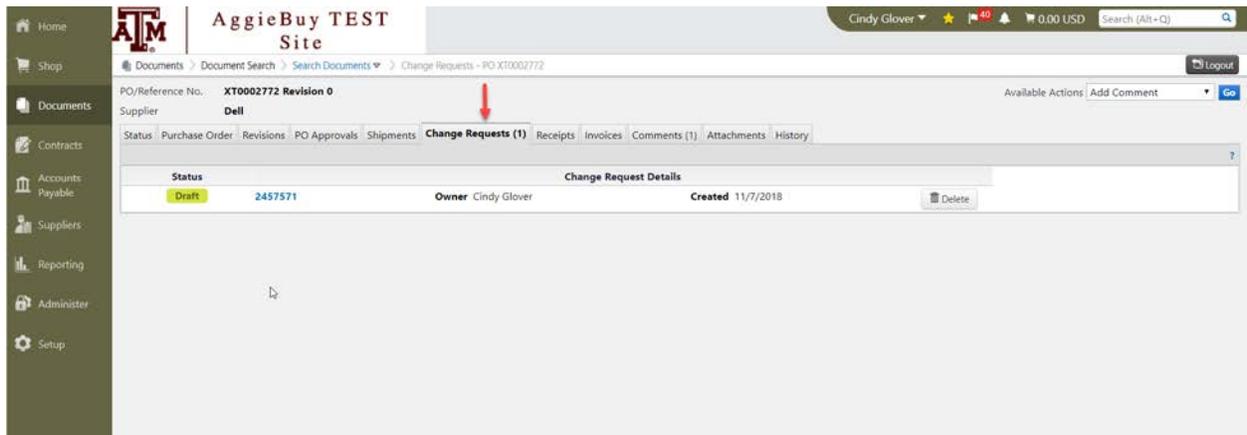


Each change request is approved by Purchasing/AP staff in the Specialized Approvals folder or in the Purchasing Approval steps. During this approval it will be flagged to integrate to FAMIS and determination will be made on if it should be sent to the vendor.

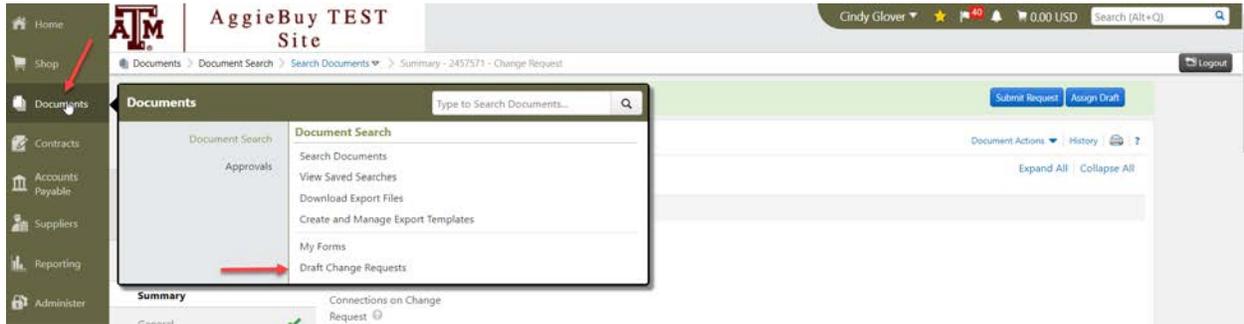
\*If you know that the revised purchase needs to be sent to the vendor you can add that in the internal notes (you would only need to add it on one line item). If you add this note then the buyer/AP staff will not need to contact you to find out if the vendor needs a revised purchase order. When the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

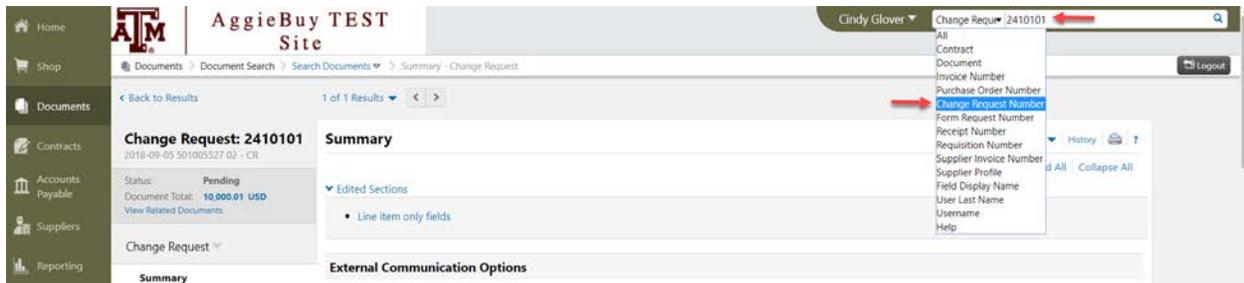


**\*\*\*There can only be one change request in process at a time. If there is an existing DRAFT or PENDING change request on the purchase order you will not have the option to create a new one.**

## 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.

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' (Purchase Order Number(s)), 'Purchase Order Information' (Participant(s), Owner, Prepared By, Approved By, Date, Total Amount, Supplier, Department, Business Unit), and 'Item/Product Information' (Catalog Number(SKU), Product Description). The 'Change Request Status' section includes checkboxes for Draft, Pending, Withdrawn, Completed, Returned, Rejected, and No Change Request. Red arrows point to the 'Search' button, the 'Purchase Orders' 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) from supplier Dell. The breadcrumb trail is 'Documents > Document Search > Search Documents > Change Requests - PO XT0002772'. The 'Change Requests (1)' tab is active, showing a table with the following details:

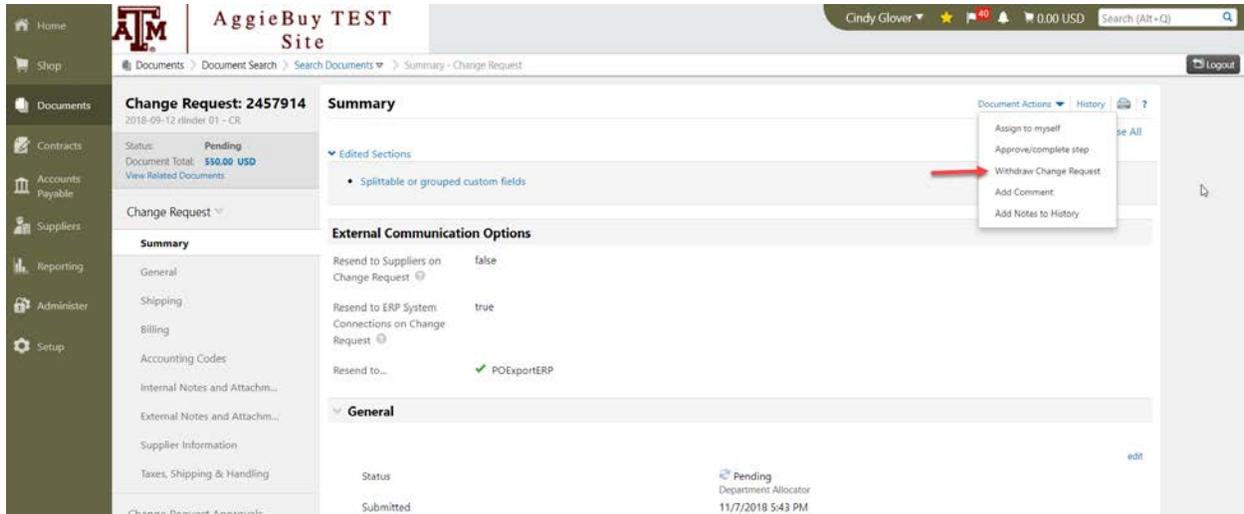
Status	Change Request Details
Draft	2457571 Owner: Cindy Glover Created: 11/7/2018

A 'Delete' button is visible in the bottom right corner of the table row, with a red arrow pointing to it. Other available actions include 'Add Comment' and 'Go'.

# 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.

