

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.

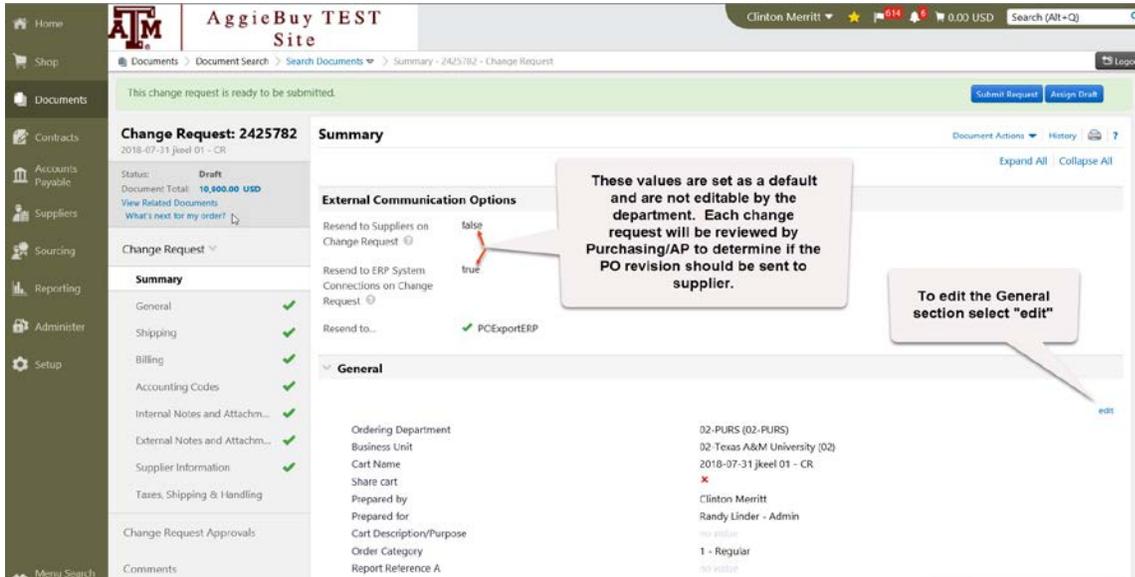
Who can initiate the Change Request

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

The screenshot shows 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 the navigation bar, there is a breadcrumb trail: Documents > Document Search > Search Documents > Status - PO:XT0003660. A callout box with a white background and a grey border contains the text: "Under available actions on the Purchase Order Select 'Create Change Request' and then 'Go'". The callout box points to the 'More Actions' menu, which is open and shows a list of actions: Add Comment, Create Change Request, Add Notes To History, Add Discount, Cancel PO, Finalize Revision, Create Quantity Receipt, Create Credit Memo, Create Invoice, Print Fax Version, Send Test PO, Soft Close PO, and Close PO. The 'Create Change Request' option is highlighted in blue. Below the callout box, the main content area displays the purchase order details for PO/Reference No. XT0003660 Revision 0, Supplier VWR SCIENTIFIC, and a table of line items. The line items table has columns for Product Description, Catalog No, Size / Packaging, Unit Price, Quantity, Ext. Price, Supplier, Receiving, Invoicing, and Matching. The line items are: 1 Mycoloxin (2,000 EA, 5.00 unit price, 10,000.00 USD ext. price), 2 Colestyramine (2 EA, 400.00 unit price, 800.00 USD ext. price), and 3 STUFF (1 EA, 100.00 unit price, 100.00 USD ext. price). At the bottom right, there is a summary table with Subtotal 10,900.00, Shipping 0.00, and a total of 10,900.00. The footer of the page includes the text "Powered by JAGGAER | Privacy Policy".

Change Request View

This is the summary view of the change request.



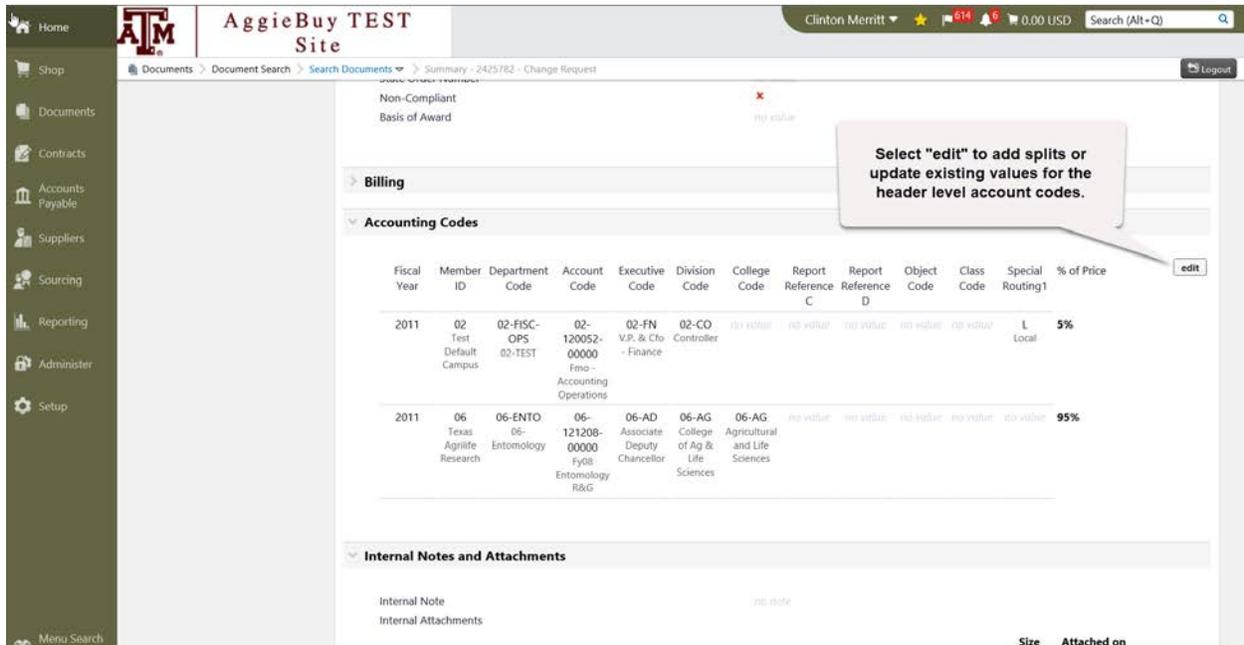
This view is different than our other documents, notice the ability to go to each section is down the left side of the page vs the tab view of other documents. Navigate to the section that needs to be changed by clicking on the section or you can scroll down through the summary page to get to the section. 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.

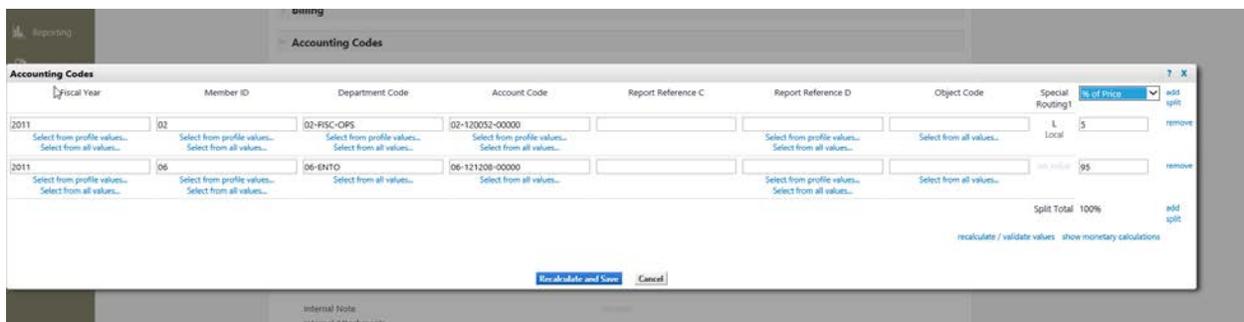
Editing Account Codes on the Change Request

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.

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:

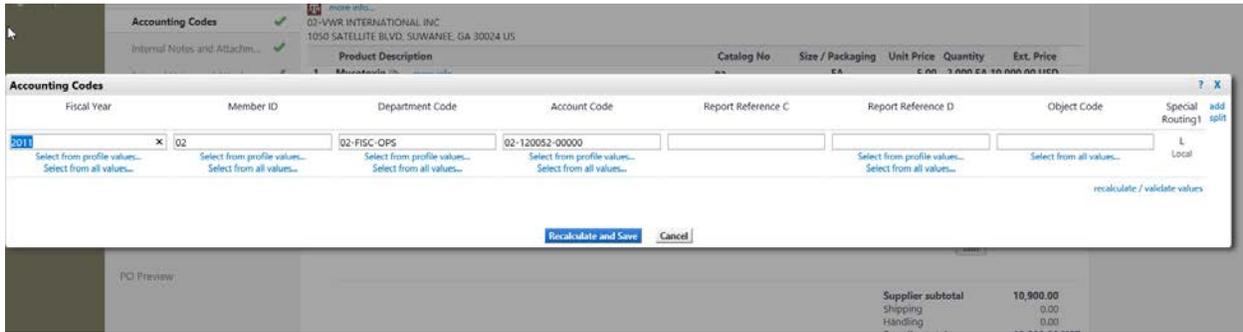
Fiscal Year	Member ID	Department Code	Account Code	Report Reference C	Report Reference D	Object Code	Special Routing 1
2011	02 Test Default Campus	02-FISC-OPS 02-TEST	02-120052-00000 Fmo - Accounting Operations	no value	no value	no value	L Local

VWR SCIENTIFIC

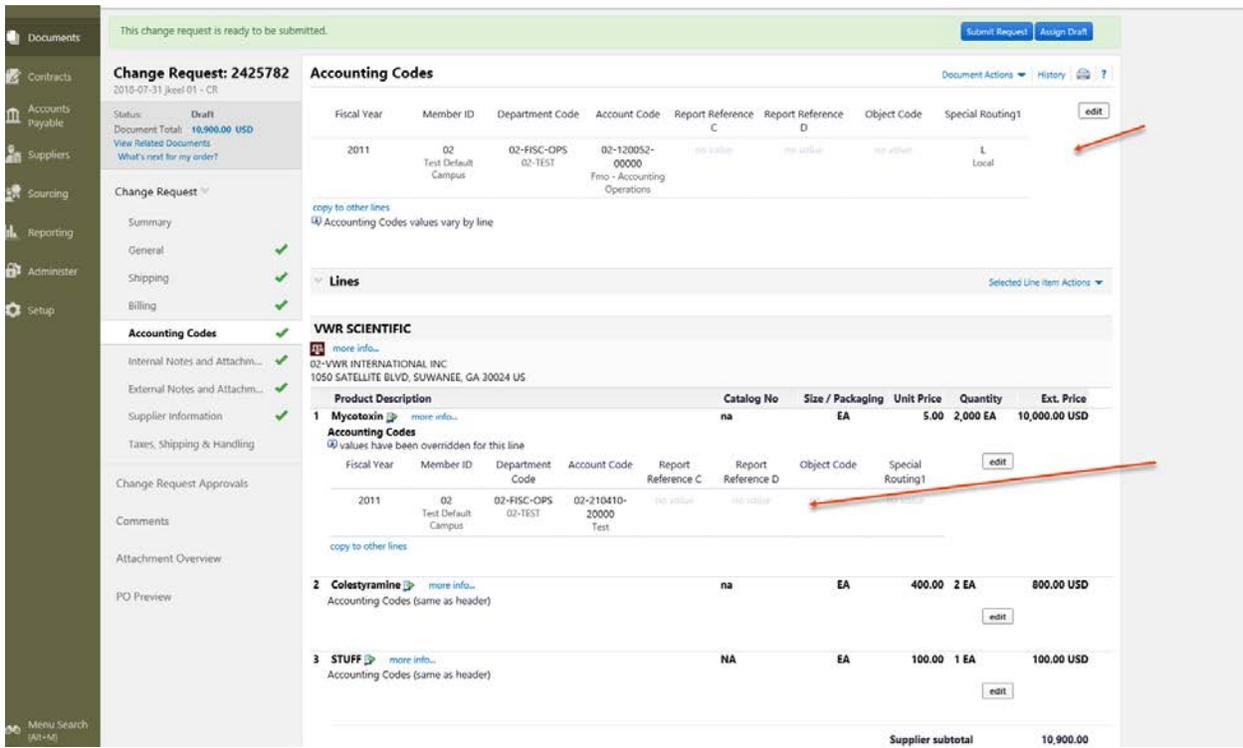
02-VWR INTERNATIONAL INC
1050 SATELLITE BLVD, SUWANEE, GA 30024 US

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. 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.



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 list of order lines for 'VWR SCIENTIFIC'. Three callout boxes provide instructions:

- Top Callout:** "To add a new item to the PO for the supplier click 'Add non-catalog item for this supplier'"
- Bottom Callout:** "To edit description, Catalog No., Qnty, Price, Packaging, click on the non-catalog item logo or 'more info'."
- Right Callout:** "To edit the quantity only select 'edit'"

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

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 following fields:

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

Below the main form, there are sections for 'Product Details' and 'Product Attributes'.

Product Details:

- Commodity Code: 51121903
- Manufacturer Name: [Empty]
- Manufacturer Part No: [Empty]

Product Attributes:

- Controlled substance
- Recycled
- Hazardous material
- Radioactive
- Rad Minor
- Select Agent
- Toxin
- Energy Star
- Green

Buttons for 'Save' and 'Cancel' are located at the bottom of the form.

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	
1 Mycotoxin more info... <small>Accounting Codes values have been overridden for this line view/edit</small>	na	EA	4.00	1,000 EA	4,000.00 USD	<input type="checkbox"/> edit
Commodity Code: 51121903 Digitoxin 4045						Internal Note: no note Internal Attachments: Add Attachments External Note: no note Attachments for supplier: Add Attachments
2 Colestyramine more info...	na	EA	400.00	2 EA	800.00 USD	<input type="checkbox"/> edit
Commodity Code: 12352209 Amino acids or its derivatives 4040						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 then 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	
1 Mycotoxin more info... <small>Accounting Codes values have been overridden for this line view/edit</small>	na	EA	4.00	1,000 EA	4,000.00 USD	<input type="checkbox"/> edit
Commodity Code: 51121903 Digitoxin 4045						Internal Note: no note Internal Attachments: Add Attachments External Note: no note Attachments for supplier: Add Attachments
2 Colestyramine more info...	na	EA	400.00	2 EA	800.00 USD	<input type="checkbox"/> edit
Commodity Code: 12352209 Amino acids or its derivatives 4040						Internal Note: no note Internal Attachments: Add Attachments External Note: no note Attachments for supplier: Add Attachments
3 STUFF more info...	NA	EA	100.00	1 EA	100.00 USD	<input type="checkbox"/> 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: [Empty]
External Note: [Empty]

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

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

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

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

Commodity Code: 51121903
Digitoxin | 4045

Internal Note: test
996 characters remaining
expand | clear

External Note: test123
993 characters remaining
expand | clear

Save Cancel

Attachments for supplier
Add Attachments

Below shows the notes added to the line item.

Home Shop Documents Contracts Accounts Payable Suppliers Sourcing Reporting Administer Setup

AggieBuy TEST Site

Clinton Merritt 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...

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	na	EA	4.00	1,000 EA	4,000.00 USD
2 Colestyramine more info...	na	EA	400.00	0 EA	0.00 USD

Commodity Code: 51121903
Digitoxin | 4045

Internal Note: test
Add Attachments

External Note: test123
Add Attachments

Attachments for supplier
Add Attachments

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 status is 'Draft' with a total amount of 4,100.00 USD. Under 'External Communication Options', there are settings for resending to suppliers and ERP systems. A red arrow points to the 'History' link in the top right corner of the document actions area.

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-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	

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”

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.

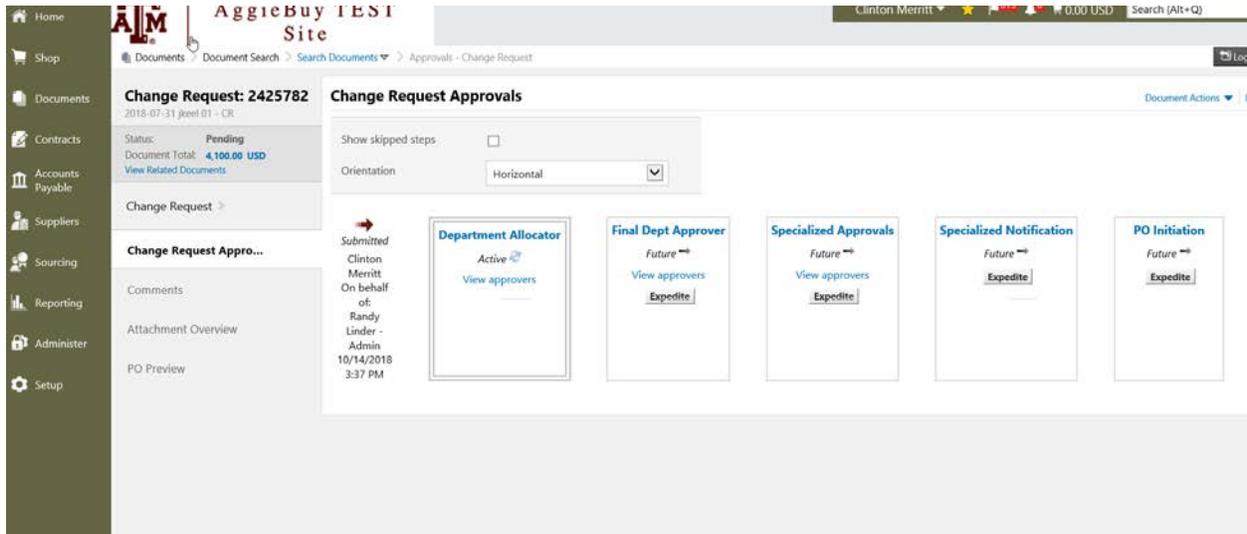
Field	Value
Resend to Suppliers on Change Request	false
Resend to ERP System Connections on Change Request	true
Resend to...	POExportERP
Ordering Department	02-PURS (02-PURS)
Business Unit	02-Texas A&M University (02)
Cart Name	2018-07-31 jkeel 01 - CR
Share cart	X
Prepared by	Clinton Merritt
Prepared 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 checkmark icon is displayed at the top left. The "Next Steps" section provides a list of actions: "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 Quick View
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”.

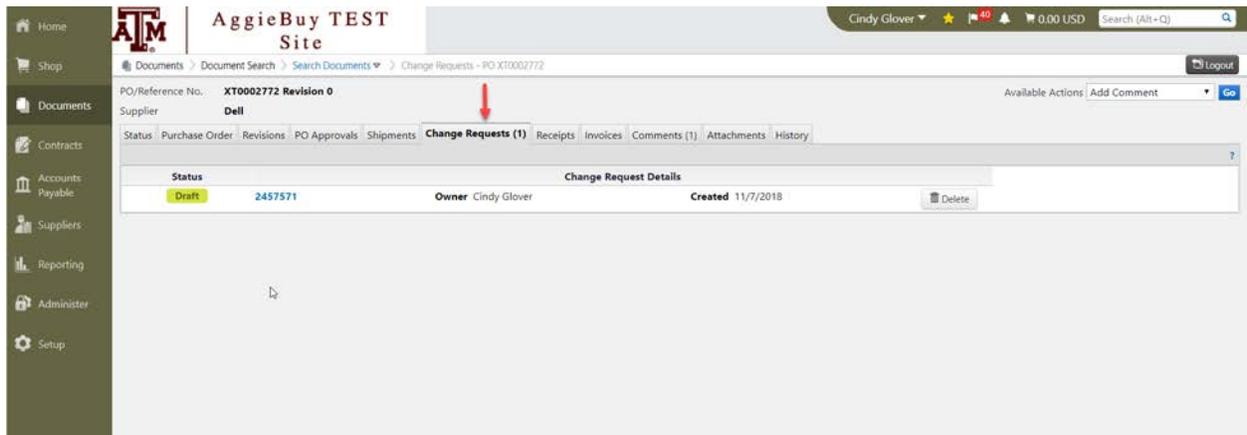


Each change request is approved by Purchasing/AP staff in the Specialized Approvals folder or in the Purchasing Approval steps. During this approval it will be flagged to integrate to FAMIS and determination will be made on if it should be sent to the vendor.

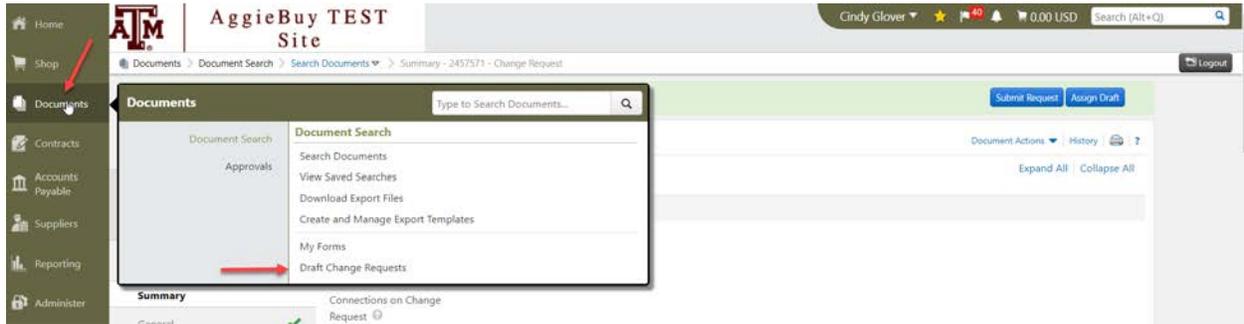
*If you know that the revised purchase needs to be sent to the vendor you can add that in the internal notes (you would only need to add it on one line item). If you add this note then the buyer/AP staff will not need to contact you to find out if the vendor needs a revised purchase order. When the change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

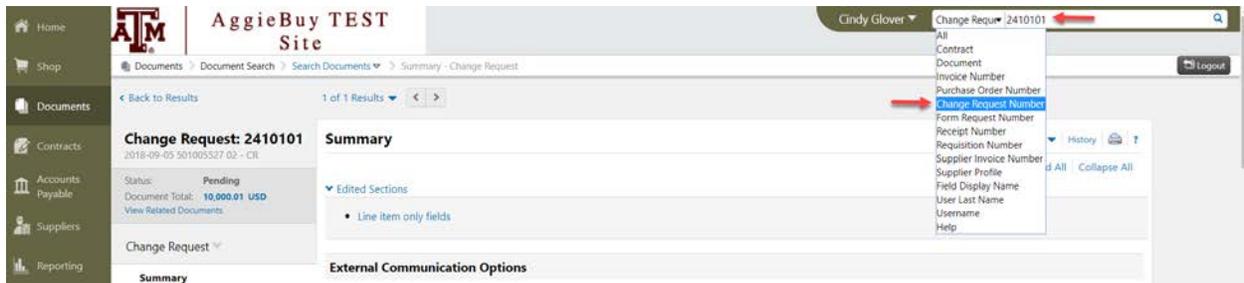


*****There can only be one change request in process at a time. If there is an existing DRAFT or PENDING change request on the purchase order you will not have the option to create a new one.**

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 'Purchase Orders' and includes a search bar with a dropdown menu. Below the search bar are several sections for filtering results:

- Purchase Order Identification:** A text input field for 'Purchase Order Number(s)'.
- Purchase Order Information:** A section with various filters:
 - Participant(s):** Radio buttons for 'Any', 'Me', and 'Pick...'.
 - Owner:** A text input field.
 - Prepared By:** A text input field.
 - Approved By:** A text input field.
 - Date:** A dropdown menu for 'Creation Date (System)' and 'All Dates'.
 - Total Amount:** A text input field.
 - Supplier:** A text input field.
 - Department:** A text input field.
 - Business Unit:** A text input field.
 - Change Request Status:** A grid of checkboxes for 'Draft', 'Pending', 'Withdrawn', 'Completed', 'Returned', 'Rejected', and 'No Change Request'.
- Item/Product Information:** A section with a text input field for 'Catalog Number(SKU)' and a text input field for 'Product Description'.

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 in the AggieBuy TEST Site. The page header includes the site name and user information. The main content area shows the purchase order details:

- PO/Reference No.:** XT0002772 Revision 0
- Supplier:** Dell
- Status:** Purchase Order, Revisions, PO Approvals, Shipments, **Change Requests (1)**, Receipts, Invoices, Comments (1), Attachments, History

The 'Change Request Details' table is displayed below:

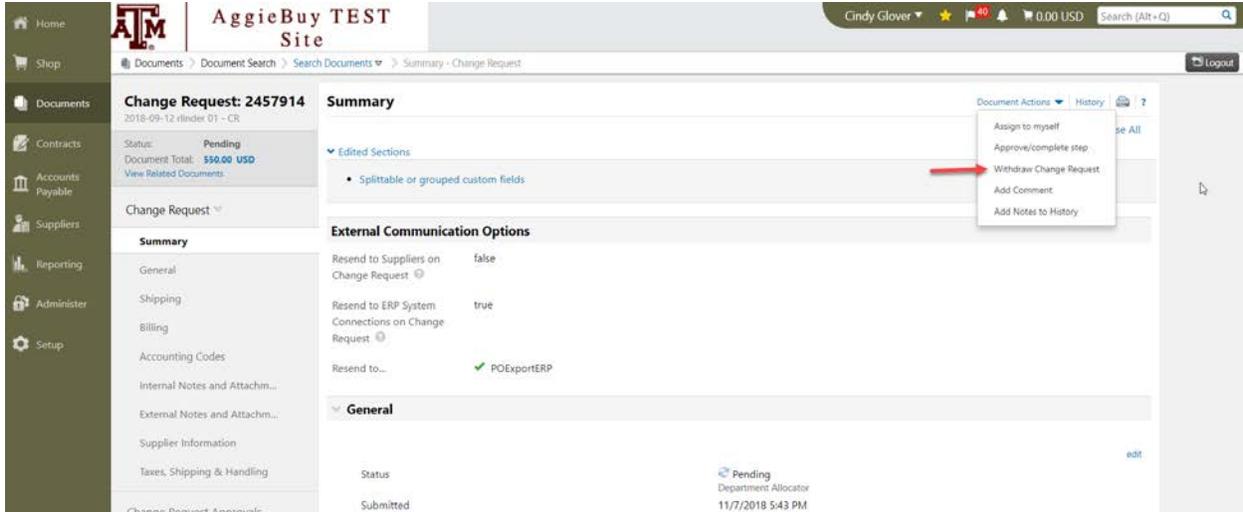
Status	Change Request Details
Draft	2457571 Owner: Cindy Glover Created: 11/7/2018

A 'Delete' button is visible in the bottom right corner of the table row, with a red arrow pointing to it.

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.

