

## **Change Requests**

At the University of Louisville, Change Requests will be initiated by the requestor. The buyer may also receive similar requests from vendors in order to update PO information. Any requests resulting in a price or quantity change will be routed to the appropriate department for approval.

**\*\*Please note that change requests do not impact or update the referenced requisition, and therefore need further approval for some changes (resulting in price change) prior to updating the corresponding Purchase Order.**

In the previous section we discussed Manage Requisition functionality, including the ability to initiate a change request. In this section, we will discuss how to create change requests in detail and which fields are available for change.

Before discussing how to create a change request, it is important to understand what a change request is in eProcurement and when the functionality is available.

Even though change requests are initiated at the requisition level via eProcurement's Manage Requisitions page – these transactions are actually requests to change Purchase Orders associated with the eProcurement requisitions. If approved, change requests feed the PO Change Order process and update the Purchase Orders accordingly. Since we are requesting a change to a PO – The Change Request option is only available in the dropdown for Purchase Orders in a Dispatched status. If a requisition has not yet been processed, the edit requisition functionality would be used instead.

### **Initiating a Change Request**

**Navigate:** eProcurement> Manage Requisitions

Enter the search criteria to search the desired Requisition to initiate a change request. **\*\*The Requisition must have resulted in a Dispatched PO to be available.**

## Manage Requisitions

**Search Requisitions**

To locate requisitions, edit the criteria below and click the Search button.

Business Unit:  Requisition Name:

Requisition ID:  Request Status:  Budget Status:

Date From:  Date To:

Requester:  Entered By:  PO ID:

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**Requisitions**

To view the lifespan and line items for a requisition, click the Expand triangle icon: ▾

To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Status	Budget	Total	
▶ <a href="#">1000108157</a>	1000108157	UOFL1	12/19/2008	PO(s) Dispatched	Valid	178.00USD	<Select Action..> <input type="button" value="Go"/>
▶ <a href="#">1000108156</a>	1000108156	UOFL1	12/19/2008	PO(s) Dispatched	Valid	149.00USD	Change Reque.. <input type="button" value="Go"/>
▶ <a href="#">1000108153</a>	1000108153	UOFL1	12/19/2008	PO(s) Dispatched	Valid	1,074.35USD	<Select Action..> <input type="button" value="Go"/>

Select Change Request option from the drop down and click on the  Button.

## Select Requisition Line for Change Request

Business Unit: UOFL1      Requisition ID: 1000108156

Requisition Lines						
Req Line	Item Description	PO Number	PO Line	PO Date	Vendor Name	
1	iPod nano, 8GB - Black	3000100629	1	12/19/2008	Apple Computers Inc	<input checked="" type="checkbox"/>

Select the Requisition lines for Change Request by clicking on the  button.

## Create Change Request

Business Unit: UOFL1      Purchase Order: 3000100629      Requisition: 1000108156

PO Date: 12/19/2008      Buyer: TRATWE01

[Justification Comments](#)


Vendor: Apple Computers Inc

PO Lines				
Line	Item ID	Item Description	Cancel PO Line	
1		<a href="#">iPod nano, 8GB - Black</a>	<input type="checkbox"/>	

Click on the [Justification Comments](#) Link to enter any comments if applicable.

Click on the **Show All PO Lines** Button to see all the lines of the PO associated with the Requisition.

If canceling PO Line select the Cancel PO Line field.

Click on the  button to make changes to PO Line.

## Change Request Line

**Business Unit:** UOFL1      **Purchase Order:** 3000100629      **Requisition:** 1000108156

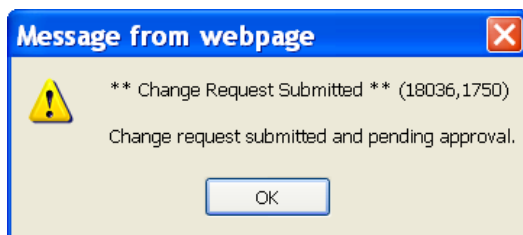
**PO Line:** 1  
**Unit of Measure:** Each  
**Description:** iPod nano, 8GB - Black  
**New Description:**

PO Schedules						
Schedule	Due Date	Ship To	Merchandise Amt		Cancel PO Ship	
1	12/19/2008	CENT_OUTSD	149.00	USD	<input type="checkbox"/>	

**\* Save Page to Submit Change\Cancel Request \***  
To cancel the entire PO, check all "Cancel PO Line" boxes on the header page.

Enter New Description if applicable. If adding to a blanket order, copy description and add statement, adding additional \$500(amount you are adding) and the date.


If this is the only change, save the page to initiate the change request.



Click OK



To change a second line, repeat actions.

Select the Cancel PO Ship field if canceling the PO Schedule.

Click on the  button to make changes to PO Schedule, quantity or price.

## Change Request Schedule

Business Unit: UOFL1      Purchase Order: 3000100629      Requisition: 1000108156

Line:	1		
Schedule:	1		
Due Date:	12/19/2008	New Due Date:	<input type="text" value="01/07/2009"/> 
Ship To:	Central Receiving Dock	New Ship To:	<input type="text"/> 
Quantity:	1.0000	New Quantity:	<input type="text" value="1"/>
Price:	149.00000	New Price:	<input type="text" value="500"/>
Amount:	149.00		USD



\* Save Page to Submit Change\Cancel Request \*  
To cancel the entire PO, check all "Cancel PO Line" boxes on the header page.

[Return to Change Request Line](#)

Save

Enter the data as applicable in the fields

In the example above, the original price was \$149.00 and the new price is \$500

If adding to a blanket and the original amount is \$1,000 and you want to add an additional \$500, the new price would be \$1500

## Requisition Approval for Change Request

Increase in quantity and/or price will trigger the requisition approval workflow for this change request.

Press **Continue** to save the change request and proceed to submit the requisition for approval.

Press **Cancel** to return to the previous page without saving.

Continue

Cancel

Click Continue

Submit For Change Approval

Click

After the page is saved Workflow notification will go out for approval since these changes result in a new price (quantity and price changes). Change requests (if approved where required) will be processed by the PO Change Order process and update the corresponding Purchase Orders with the new data.

To Approve a Change Request at Department Level

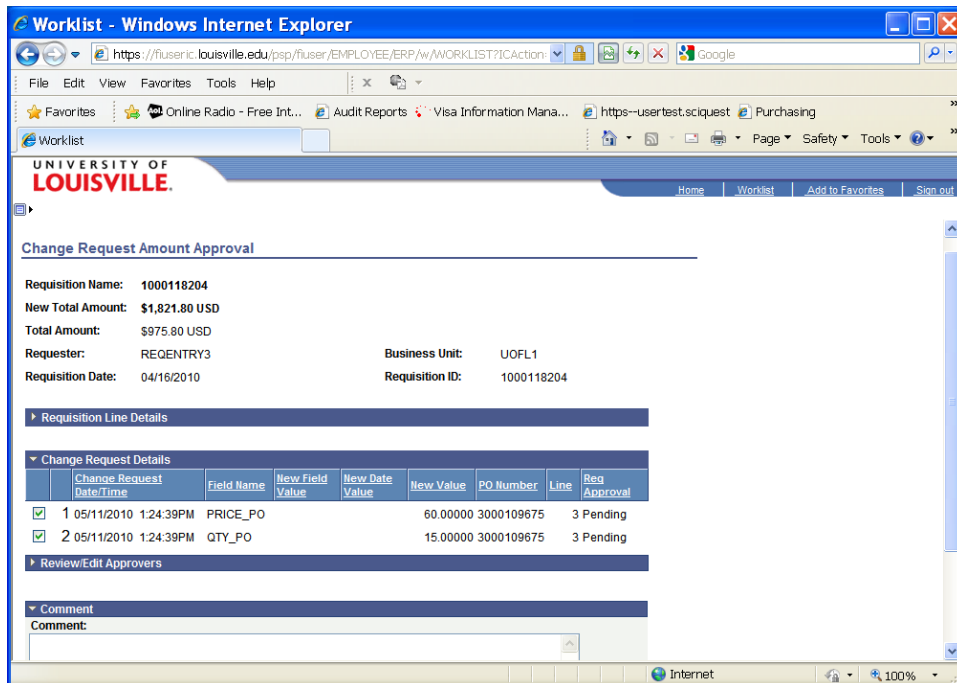
Log into PeopleSoft

Click on your worklist

REQENTRY3	05/11/2010	Approval Routing	Approval Workflow	2-Medium	<a href="#">ePro Change Req Amt Appr. 301, BUSINESS_UNIT:UOFL1 REQ_ID:1000118218</a>
REQENTRY3	05/11/2010	Approval Routing	Approval Workflow	2-Medium	<a href="#">ePro Change Req Amt Appr. 311, BUSINESS_UNIT:UOFL1 REQ_ID:1000118204</a>

Note: The link will say ePro Change Req.

Click on the link



Note: New Total Amount of Requisition and Total Amount (original amount of req before change)

Click on arrow **Requisition Line Details** to see line details

The screenshot shows a web browser window titled "Worklist - Windows Internet Explorer" displaying a requisition page for the University of Louisville. The page includes a navigation bar with "Home", "Worklist", "Add to Favorites", and "Sign out" links. Below the navigation bar, the requisition details are displayed:

requester: REGENIKYJ      business unit: UOFL1  
 Requisition Date: 04/16/2010      Requisition ID: 1000118204

The "Requisition Line Details" section contains the following table:

Line	Item Description	Quantity	UOM	Price	Amount	New Quantity	New Price	New Amount
1	BEAKER,PP,250ML,GRADUATED [ BEL-ART / F262130000 ] Griffin Low Form Polypropylene Beaker	12.0000	PK	18.00000	216.000			216.000
2	GLOVE, POLY NYLON SM DOZEN [ MAGID GLOVE / JPS16 ] Polyurethane Coated Glove	1.0000	CS	705.80000	705.800			705.800
3	SHOWER TEST KIT WBUCKET [ FIRST SAFETY CORPORATION / H-140 ] Shower Tester Kit with Bucket	1.0000	EA	54.00000	54.000	15.0000	60.00000	900.000

The "Change Request Details" section contains the following table:

	Change Request Date/Time	Field Name	New Field Value	How Date Value	New Value	PO Number	Line	Req Approval
<input checked="" type="checkbox"/>	1 05/11/2010 1:24:39PM	PRICE_PO	60.00000		3000109675		3	Pending
<input checked="" type="checkbox"/>	2 05/11/2010 1:24:39PM	QTY_PO	15.00000		3000109675		3	Pending

Below the change request details is a "Review/Edit Approvers" button and a "Comment" section.

Note Change Request Details

Original lines on the requisition with detail information

Change Request Details

There were two changes made.

The first change was made to the price, the new price is noted and the approval is pending.

The second change was made to the quantity, the new quantity is noted and the approval is pending.

**Review/Edit Approvers**

The second change Click on the arrow to view the approvals required.

This is the same screen to see for requisition approvals.

Item	Timestamp	Description	Price	Quantity	Status
1	9:49:59AM	DESCR254_MIXED price and description	3000109551	1	Approved
2	04/02/2010 9:49:59AM	PRICE_PO	600.00000 3000109551	1	Pending

▼ Comment

**Comment:**

Comment box is available just as in requisition approval



Click on Approve or Deny as appropriate

Change Request Date/Time	Field Name	New Field Value	New Date Value	New Value	PO Number	Line	Req Approval
04/08/2010 2:52:05PM	QTY_PO			2.00000	3000109531	1	Pending

Review/Edit Approvers

Departmental Approval

**Line 1: Approved**  
Latitude E6500;IntelREG CoreTM 2 Duo P8700 with VT (2.53GHz, 3M L2 Cache, 1066MHz FSB)

Route to Department Approvers

**Approved**

✓ [REQAPPROVE1](#)  
ePro Department Approver  
4/8/2010 - 3:32 PM

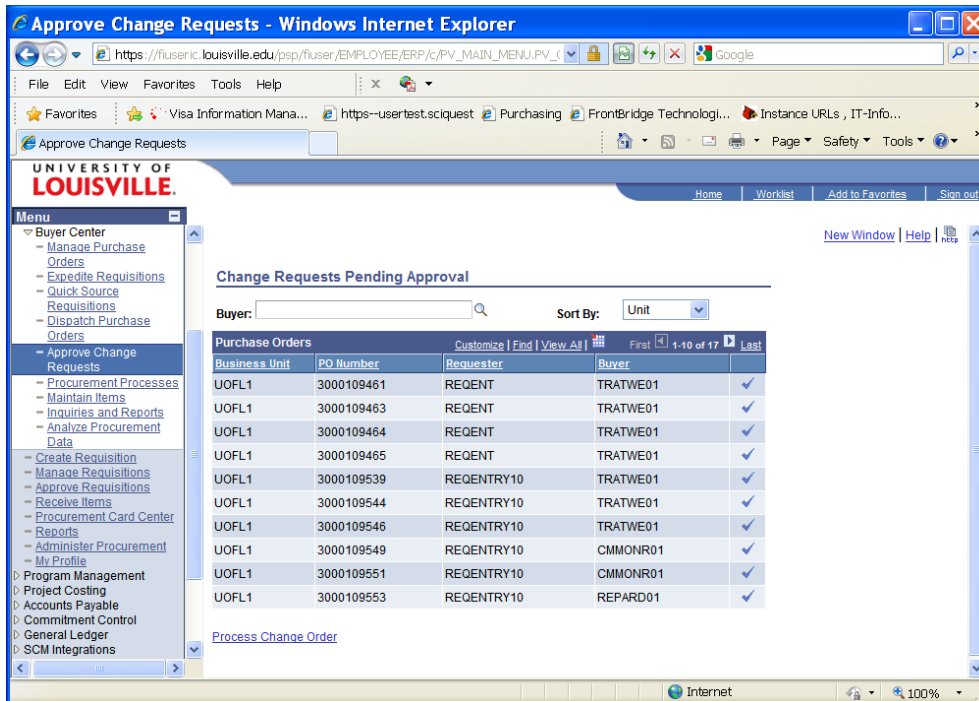
Comment

Comment:

Shows approved

To approve change requests at Buyer level


Navigate: eProcurement > Buyer Center > Approve Change Requests



Use the request

Buyer:

to show only a particular buyer's change

Click on  of change order to approve

### Change Request Details

Business Unit:	UOFL1	PO Number:	3000109539	Change Order:	
Source:	User Change Request			<a href="#">Approve All</a>	
Submitter:	REQENTRY10	Last Change Date:			
Submit DateTime:	04/02/2010 10:04:35AM	Reviewed On:	<input type="checkbox"/> Reviewed		
Justification:	<input type="text"/>				


Line	Sched Num	Process Status	Date Submitted	Change	New Value	Approval Action
1		Initialize	04/02/2010	More Information	REFRIGERATOR, black	<input type="button" value="v"/> <input type="button" value="-"/>

Type in comment if appropriate

Click on [View Purchase Order](#) link to review the PO

### Purchase Order Inquiry

Business Unit:	UOFL1	PO Number:	3000109539	Change Order:	
PO Date:	02/02/2010	Vendor:	0000007778	CHARLIEWIL-001	
Buyer:	TRATWE01	Terms:	30		

Line	Item ID	Description	Amount	UOM	PO Qty	Status
1			\$5,001.00	EA	1.0000	Active 

Click on  to view the line details

### Line Details

Item ID:	REFRIGERATOR			
Amount:	5,001.00	USD	PO Qty: 1.0000	Status: Active
Buy Agree ID:			Buying Agreement Line Nbr:	
RFQ ID:		RFQ Line:	Receiving Required:	Y
Category:	00608		<input type="checkbox"/> Inspection Required	
Vndr Catg:			<input type="checkbox"/> Withholding Applicable	
Vnd Itm ID:				
Manufacturer ID:				
Price Date:	Due	Price Qty:	Schedule	
Config Code:				
Template:				

Click OK

### Change Request Details

Business Unit:	UOFL1	PO Number:	3000109539	Change Order:	
Source:	User Change Request	<input type="button" value="Approve All"/>			
Submitter:	REQENTRY10	Last Change Date:			
Submit DateTime:	04/02/2010 10:04:35AM	Reviewed On:	<input type="checkbox"/> Reviewed		
Justification:	<input type="text"/>				

Line	Sched Num	Process Status	Date Submitted	Change	New Value	Approval Action
1		Initialize	04/02/2010	More Information	REFRIGERATOR, black	<input type="button" value="Approve"/> <input type="button" value="Deny"/> <input type="button" value="Pending"/>

[Return to Change Requests Pending Approval](#) [View Purchase Order](#) [View Processing Messages](#)

Check the  Reviewed This will enter the date reviewed.

Reviewed On: 04/02/2010  Reviewed

Click on the drop down box to choose Approve , Pending or Deny or check the  button

Click


Click [Return to Change Requests Pending Approval](#) link to return to your pending approval list.

**Change Requests Pending Approval**


Buyer:   Sort By:  

Purchase Orders				
Business Unit	PO Number	Requester	Buyer	
UOFL1	3000109389	REQENT	TRATWE01	✓
UOFL1	3000109461	REQENT	TRATWE01	✓
UOFL1	3000109463	REQENT	TRATWE01	✓
UOFL1	3000109464	REQENT	TRATWE01	✓
UOFL1	3000109527	REQENT	TRATWE01	✓
UOFL1	3000109531	REQENT	TRATWE01	✓
UOFL1	3000109538	REQENT	REPARD01	✓
UOFL1	3000109541	REQENT	TRATWE01	✓
UOFL1	3000109549	REQENTRY10	CMMONR01	✓
UOFL1	3000109550	REQENT	CMMONR01	✓

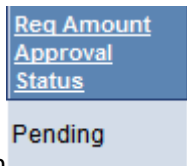
[Process Change Order](#)

Click on  of change order to approve

Line	Sched Num	Process Status	Date Submitted	Change	New Value	Req Amount Approval Status	Approval Action
1	1	Initialize	04/08/2010	Purchase Order Quantity	2	Pending	

 The increase in price and/or quantity above is awaiting requisition amount approval and is not yet available for change request approval.

<b>Req Amount Approval Status</b>
Pending

Note: This requisition has column . The change order is still awaiting department approval

Once you have approved your change orders, click on [Process Change Order](#)

## Change Purchase Order

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

Run Control ID: begins with

Case Sensitive

[Search](#)

[Clear](#)

[Basic Search](#)  [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

To add a new run control, click [Add a New Value](#)

[Add](#)

Type in name for run control and click

[PO Changes](#)

Run Control ID: Ralph

[Report Manager](#) [Process Monitor](#)

### Chg Request Selection Criteria

Source:

Business Unit:

Business Unit To:

PO ID:

PO ID To:

### PO Update Options

Override Dflt Buyer's PO Sts

PO Status:

Use Current UOM Conv Rate

[Save](#)

[Return to Search](#)

[Previous in List](#)

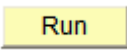
[Next in List](#)

[Notify](#)

Complete fields as above and click

[Save](#)


To process for one PO, enter the PO ID in appropriate field.

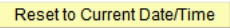
Click 


**Process Scheduler Request**

User ID: SDRUSS01      Run Control ID: Ralph

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Server Name:       Run Date:  

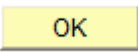
Recurrence:       Run Time:       

Time Zone:  

Select	Description	Process Name	Process Type	*Type	*Format	Distribut
<input checked="" type="checkbox"/>	Change Purchase Order	PO_POCHNG	Application Engine	Web <input type="text" value="v"/>	TXT <input type="text" value="v"/>	Distributi


 

Make sure the server name is PSUNX

Click 

**PO Changes**



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Run Control ID: Ralph      [Report Manager](#)   [Process Monitor](#)   

Process Instance: 946897

**Chg Request Selection Criteria**

Source:

Business Unit:        Business Unit To:  

PO ID:        PO ID To:  

**PO Update Options**

Override Dfit Buyer's PO Sts      PO Status:

Use Current UOM Conv Rate

Note Process Instance: 946897

Click on [Process Monitor](#) link

Process List   Server List

View Process Request For

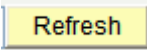
User ID: SDRUSS01   Type:   Last: 3 Days   Refresh

Server: PSUNX   Name:   Instance:   to

Run Status:   Distribution Status    Save On Refresh

Process List   Customize | Find | View All | First 1 of 1 Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	946897		Application Engine	PO_POCHNG	SDRUSS01	04/09/2010 10:44:25AM EDT	Success	Posted	<a href="#">Details</a>

Click  until Status is Success and Posted

Budget Check

Approval workflow