

How the DEP Buyer Approves a PO Change Requests August 2007

All PO Change Requests must be reviewed by the buyer listed on the purchase order. It is the responsibility of the buyer to approve or deny all PO Change Requests:

- DEP PO Change Requests will be approved by the department requester/buyer
- ACQ and NFY PO Change Requests will be approved by the Acquisition buyer

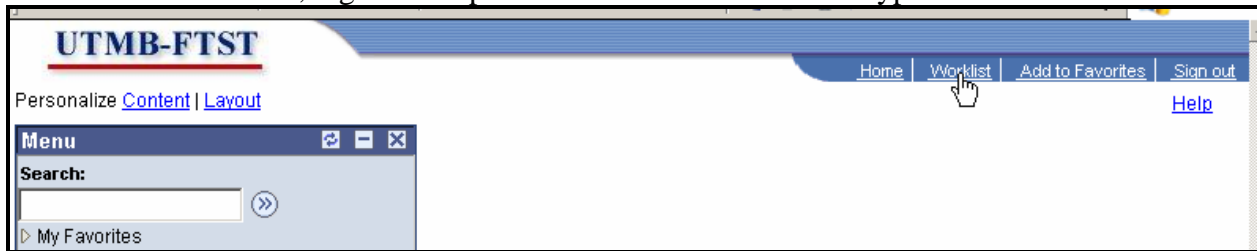
Note: Before an increase to quantity or price can be approved/denied by the buyer, the PO Change Request must be approved by the appropriate ePro Approvers (i.e., department, project, and commodity as applicable).

There are two ways a buyer can review PO Change Requests routed to them for approval:

- From their Worklist; or
- From the ePro Buyer Center

Both pathways work in the same manner.

To access the Worklist, log into PeopleSoft and click the Worklist hyperlink:



Click the hyperlink associated with the PO Change Request to be reviewed:

The screenshot displays a 'Worklist' table with the following data:

From	Date From	Work Item	Worked By Activity	Priority	Link
Cook, Karen	07/28/2006	Change Request Approval	Change Order Notification	<input type="text"/>	0_UTMBG_0000161367
Cook, Karen	07/28/2006	Change Request Approval	Change Order Notification	<input type="text"/>	0_UTMBG_0000161366

To access the ePro Buyer Center, log into PeopleSoft. Using the menu, select:
eProcurement > Buyer Center > Approve Change Requests

This page displays the PO number, requester, and buyer. Click the checkmark to the right of the PO Change Request to be reviewed:

The screenshot shows the 'Change Requests Pending Approval' page. It includes a search box for the Buyer, a 'Sort By' dropdown set to 'Unit', and a table of pending requests. A checkmark is visible in the rightmost column of the table.

Business Unit	PO Number	Requester	Buyer
UTMBG	0000161344	bmclaren	bmclaren

The following page will display whether it was accessed via the Worklist or from the Buyer Center. This page displays the date and time the request was submitted and who submitted the request. It also displays the justification for the change, the type of change, the process status, and the requested New Value for the PO change.

Change Request Details

Business Unit: UTMBG **PO Number:** 0000161344 **Change Order:**

Source: User Change Request Approve All

Submitter: bmclaren **Last Change Date:**

Submit DateTime: 06/01/2006 11:08:58AM **Reviewed On:** Reviewed

Justification:

Book is no longer in print; vendor does not have book in stock and cannot ship it to UTMB

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

Line	Sched Num	Process Status	Date Submitted	Change	New Value	Approval Action
3		Initialize	06/01/2006	Status	Canceled	

Prior to approving a PO Change Request, the buyer should validate that an appropriate justification has been entered and the buyer must confirm that the change falls with established guidelines. Requests should not be approved:

- To change Animal Express orders (ARC)
- To increase the quantity for line items already received and paid in full
- To lower the price to less than what has been paid
- To lower the quantity to less than what has already been received
- To cancel a line item that has already been received or paid
- To increase the quantity on blanket orders/orders distributed by amount

Prior to approval, the buyer should review the PO Activity Summary page to confirm:

- the line item quantity has not been received in full and paid by A/P
- the new price is not less than what has already been paid
- the new quantity is not less than what has already been received
- the line item being “canceled” hasn’t already been received or paid

For more information regarding the PO Activity Summary page, refer to “How to Use PO Activity Summary in ePro” located in the eProcurement Quick Reference User Guide available from the PeopleSoft “landing page” or from the Logistics website.

From the Change Request Detail page, the buyer has several options to choose from:

- View the Purchase Order
- Mark the PO Change Request as “reviewed” to advise the end-user it is currently being reviewed
- Approve all requested changes associated with the specified PO
- Approve/Deny individual requests

To view the Purchase Order, click the View Purchase Order hyperlink:

Change Request Details

Business Unit: UTMBG PO Number: 0000161344 Change Order:

Source: User Change Request Approve All

Submitter: bmclaren Last Change Date:

Submit DateTime: 06/01/2006 11:08:58AM Reviewed On: Reviewed

Justification:

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

Line	Sched Num	Process Status	Date Submitted	Change	New Value	Approval Action
3		Initialize	06/01/2006	Status	Canceled	

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

After reviewing the PO, click the Return to Change Request Inquiry hyperlink:

Purchase Order Inquiry

Business Unit: UTMBG PO Number: 0000161344 Change Order:

PO Date: 06/01/2006 Vendor: 0000020726 MAJORS SCI-001

Buyer: bmclaren Terms: 30

Customize | Find | View All | First 1-3 of 3 Last

Line	Item ID	Description	Amount	UOM	PO Qty	Status
1			\$150.000	CS	1.0000	Active
2			\$555.000	EA	10.0000	Active
3			\$115.000	EA	5.0000	Active

[Return to Change Request Inquiry](#)

Optional: If the buyer is not ready to approve or deny the PO Change Request, click the Reviewed box and then the SAVE button:

Change Request Details

Business Unit: **UTMBG** PO Number: **0000161344** Change Order:

Source: User Change Request **Approve All**

Submitter: bmclaren Last Change Date:

Submit DateTime: 06/01/2006 11:08:58AM Reviewed On: 06/01/2006 Reviewed

Justification: Book is no longer in print; vendor does not have book in stock and cannot ship it to UTMB

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

Line	Sched Num	Process Status	Date Submitted	Change	New Value	Approval Action
3		Initialize	06/01/2006	Status	Canceled	<input type="text"/>

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

Save **Notify**

To approve all change requests listed for this PO, click the “Approve All” button and then click the SAVE button:

Change Request Details

Business Unit: **UTMBG** PO Number: **0000161344** Change Order:

Source: User Change Request **Approve All**

Submitter: bmclaren Last Change Date: 06/01/2006 12:41:13PM

Submit DateTime: 06/01/2006 11:08:58AM Reviewed On: 06/01/2006 Reviewed

Justification: Book is no longer in print; vendor does not have book in stock and cannot ship it to UTMB

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

Line	Sched Num	Process Status	Date Submitted	Change	New Value	Approval Action
3		Initialize	06/01/2006	Status	Canceled	Approve

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

Save **Notify**

Once the PO Change Request has been saved with an appropriate Approval Action, the request will drop off the “Pending Approval” listing and the buyer’s Worklist.

To Approve or Deny individual requests, select the appropriate Approval Action next to each request and click SAVE.

Change Request Details

Business Unit: UTMBG	PO Number: 0000161345	Change Order:
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Source: User Change Request

Submitter: bmclaren **Last Change Date:**

Submit DateTime: 06/01/2006 2:09:20PM **Reviewed On:** Reviewed

Justification:

Coffee mugs have both the UTMB logo and the picture of "OLD Red" - description needs to be updated; additionally these mugs should be

[Customize](#) | [Find](#) | [View All](#) |
First 1-3 of 3 Last

Line	Sched Num	Process Status	Date Submitted	Change	New Value	Approval Action
1		Initialize	06/01/2006	More Information	Coffee mugs with the UTMB logo and a picture of "Old Red"	<input type="button" value="Approve"/> <input type="button" value="-"/>
1	1	Initialize	06/01/2006	Due Date	2006-06-30	<input type="button" value="Approve"/> <input type="button" value="-"/>
1	1	Complete	06/01/2006	Ship To Location	M1	<input type="button" value="Deny"/> <input type="button" value="-"/>

Once approved by the buyer, the PO Change Request is ready for processing by the daily automated process.