

How to create a PO Change Request August 2007

If a department determines that a change needs to be made to a Purchase Order that has already been sent to the vendor (PO Status of Dispatched), it will be the responsibility of the end-user to create a PO Change Request in ePro. The following data may be changed on a PO using this process:

- Cancel a PO line item
- Change Description of line item
- Change the Due Date
- Change the "Ship to"
- Change Quantity
- Change Price

Note: Once an item has been partially or fully received, the end-user can no longer create a PO Change to cancel the line item; change the description; change the ship to location; or change the price. Additionally, once an item has been partially or fully received, the quantity cannot be changed to less than the quantity already received.

PO Change Requests should not be created to:

- Change Animal Express orders (ARC)
 - Increase line items already received and paid in full
 - Lower the price to less than what has already been paid
 - Increase the Quantity on blanket orders
- note: Distribute by Amount orders must have a quantity of 1

All PO Change Requests must include a justification as to why the PO is being altered (i.e., vendor advised item no longer available; error in description; incorrect ship to location entered; etc.) For DEP orders, the justification should also include the date and name of the vendor representative that the department spoke to regarding the change.

Initial Steps for ALL PO Change Requests

Pathway: ePro > Manage Requisitions > Locate appropriate requisition/po

Click the PO Change Request icon next to the appropriate requisition:

The screenshot shows the 'Manage Requisitions' interface. At the top, there is a search bar with the title 'Find a Requisition'. Below this, there are several input fields for search criteria: 'Req Name/ID' (000016859), 'Business Unit' (UTMBG), 'Requester' (empty), 'Date From' (05/25/2006), 'Thru Date' (06/01/2006), 'Entered By' (empty), 'PO ID' (empty), and 'Show Status' (PO(s) Dispatch). A 'Find' button is located to the right of the 'Business Unit' field. Below the search fields, there is a table with the following columns: 'Requisition Name', 'Req ID', 'Bus. Unit', 'Date', 'Status', 'Budget', and 'Total'. The table contains one row: 'Test- PO Req - Cancel...' with Req ID 0000168592, Bus. Unit UTMBG, Date 06/01/2006, Status PO(s) Dispatched, Budget Valid, and Total 820.00 USD. To the right of the table, there are several icons, including a green circular arrow, a green checkmark, a document icon, and a red 'X' icon, which is the PO Change Request icon mentioned in the text.

Click the checkmark to the right of the appropriate line item to be changed:

Select Requisition Line for Change Request						
Business Unit: UTMBG		Requisition ID: 0000168592				
Customize Find View All First 1-3 of 3 Last						
<u>Req Line</u>	<u>Item Description</u>	<u>PO Number</u>	<u>PO Line</u>	<u>PO Date</u>	<u>Vendor Name</u>	
1	Secret to my success; books 5/case	0000161344	1	06/01/2006	MAJORS SCIENTIFIC BOOKS INC	<input checked="" type="checkbox"/>
2	Medical reference manual	0000161344	2	06/01/2006	MAJORS SCIENTIFIC BOOKS INC	<input checked="" type="checkbox"/>
3	Talking with patience	0000161344	3	06/01/2006	MAJORS SCIENTIFIC BOOKS INC	<input type="checkbox"/>

Click the Justification Comments hyperlink:

Create Change Request						
Business Unit: UTMBG		Purchase Order: 0000161344		Requisition: 0000168592		
PO Date:	06/01/2006	Buyer:	bmclaren	Justification Comments		
Vendor:	MAJORS SCIENTIFIC BOOKS INC			<input type="button" value="Show All PO Lines"/>		
Customize Find View All First 1 of 1 Last						
<u>Line</u>	<u>Item ID</u>	<u>Item Description</u>	<u>Cancel PO Line</u>			

Type an appropriate justification explaining why this line item needs to be changed on the PO. Then click the Return to Previous Page hyperlink:

Justification Comments:
6/11/2007 - Per vendor rep, John Smith, book is no longer in print; vendor does not have book in stock and cannot ship it to UTMB
Return to Previous Page

The above steps need to be completed for all types of PO Change Requests. Below outlines the various types of changes and how they can be requested.

To Cancel a Specific Line Item from the PO:

As illustrated above, click the checkmark to the right of the appropriate line item to be canceled. Click the Justification Comments hyperlink and enter an appropriate comment explaining why this line item is being canceled.

Check the Cancel PO Line box:

Create Change Request

Business Unit: UTMBG **Purchase Order:** 0000161344 **Requisition:** 0000168592

PO Date: 06/01/2006 **Buyer:** bmclaren [Justification Comments](#)

Vendor: MAJORS SCIENTIFIC BOOKS INC [Show All PO Lines](#)

[Customize](#) | [Find](#) | [View All](#) | [First](#) < 1 of 1 > [Last](#)

Line	Item ID	Item Description	Cancel PO Line
3		Talking with patience	<input checked="" type="checkbox"/>

Click the Save button:

Business Unit: UTMBG **Purchase Order:** 0000161344 **Requisition:** 0000168592

PO Date: 06/01/2006 **Buyer:** bmclaren [Justification Comments](#)

Vendor: MAJORS SCIENTIFIC BOOKS INC [Show All PO Lines](#)

[Customize](#) | [Find](#) | [View All](#) | [First](#) < 1 of 1 > [Last](#)

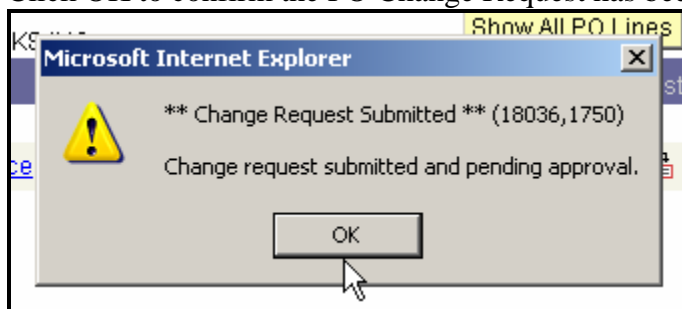
Line	Item ID	Item Description	Cancel PO Line
3		Talking with patience	<input checked="" type="checkbox"/>

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

[Return to Requisition Manager](#)

[Save](#)

Click OK to confirm the PO Change Request has been submitted for buyer approval:



To exit this page, click the Return to Requisition Manager hyperlink:

PO Date: 06/01/2006 Buyer: bmclaren [Justification Comments](#)
Vendor: MAJORS SCIENTIFIC BOOKS INC [Show All PO Lines](#)
Customize | Find | View All | First 1 of 1 Last
Line Item ID Item Description Cancel PO Line
3 [Talking with patience](#)

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

[Return to Requisition Manager](#)

To Change the Description on a line item:

As illustrated above, click the checkmark to the right of the appropriate line item to be updated. Click the Justification Comments hyperlink and enter an appropriate comment explaining what is being changed and why.

Click the Details icon:

Create Change Request
Business Unit: UTMBG Purchase Order: 0000161345 Requisition: 0000168594
PO Date: 06/01/2006 Buyer: bmclaren [Justification Comments](#)
Vendor: MARKETING SPECIALTIES [Show All PO Lines](#)
Customize | Find | View All | First 1 of 1 Last
Line Item ID Item Description Cancel PO Line
1 [Coffee mugs with the UTMB logo and a picture of "Old Red"](#)

Type the new description as it should appear on the PO Change and click the SAVE button:

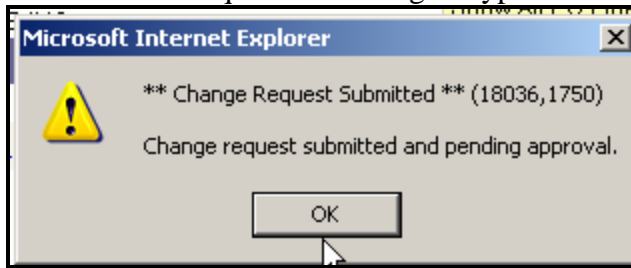
Change Request Line
Business Unit: UTMBG Purchase Order: 0000161345 Requisition: 0000168594
PO Line: 1
Unit of Measure: EACH
Description: Coffee mugs with the UTMB logo and a picture of "Old Red"
New Description: 10 oz. Mugs displaying "Old Red" and the current UTMB logo
Customize | Find | View All | First 1 of 1 Last
Schedule Due Date Ship To Merchandise Amt Cancel PO Ship
1 06/30/2006 M1 350.00 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 Header](#)

Save

Click OK to confirm the PO Change Request has been submitted for buyer approval. Then click the Return to Requisition Manager Hyperlink to exit:



To Update the Due Date and or the Ship to address:

As illustrated above, click the checkmark to the right of the appropriate line item to be updated. Click the Justification Comments and enter an appropriate justification for making this change.

Click the Details icon:

Create Change Request

Business Unit: UTMBG **Purchase Order:** 0000161345 **Requisition:** 0000168594

PO Date: 06/01/2006 **Buyer:** bmclaren [Justification Comments](#)

Vendor: MARKETING SPECIALTIES [Show All PO Lines](#)

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

Line	Item ID	Item Description	Cancel PO Line
1		Coffee mugs with the UTMB logo and a picture of "Old Red"	<input type="checkbox"/>

Click the Details icon:

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

Schedule	Due Date	Ship To	Merchandise Amt		Cancel PO Ship
1	06/01/2006	UTMBR	350.00	USD	<input type="checkbox"/>

Enter the new Due Date and/or new Ship to code and click the SAVE button:

Change Request Schedule

Business Unit: UTMBG **Purchase Order:** 0000161345 **Requisition:** 0000168594

Line: 1

Schedule: 1

Due Date: 06/01/2006 **New Due Date:** 06/30/2006

Ship To: UTMB Central Receiving **New Ship To:** M1

Quantity: 100.0000 **New Quantity:**

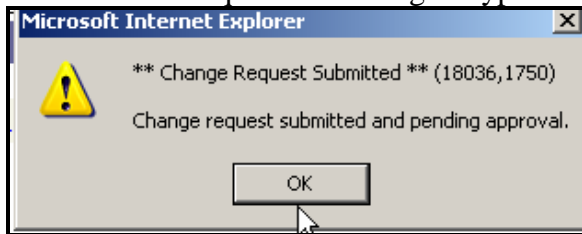
Price: 3.50000 **New Price:**

Amount: 350.00 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](#)

Click OK to confirm the PO Change Request has been submitted for buyer approval. Then click the Return to Requisition Manager Hyperlink to exit:



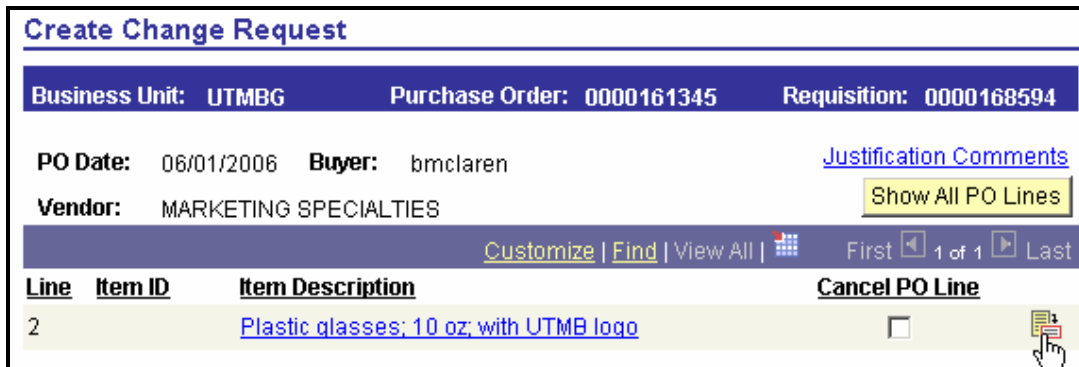
To Decrease the Price or Quantity on a Specific Line Item:

As illustrated above, click the checkmark to the right of the appropriate line item to be updated. Click the Justification Comments hyperlink and enter an appropriate comment explaining what is being changed and why. (Example: On 7/25/06, Mark Jones of Marketing Specialties advised that UTMB is entitled to a 5% discount. The price for each cup should be decreased by this amount.)

Notes:

- The new price must not be less than any amount already paid.
- The new quantity must equal or exceed any quantity already received. If a lesser quantity is entered, the PO Change Request will not update the PO and will show an error status once the automated process runs.
- **Prior to creating a PO Change Request to decrease the Price or Quantity**, go to the PO Activity Summary inquiry pages (Invoice tab/Receipt tab) to review the amount already paid or the quantity already received.

Click the Details icon:



Click the Schedule Details icon:




Enter the new quantity or price and click the SAVE button, remember:


- **The new price must not be less than any amount already paid.**
- **The new quantity must not be less than any quantity already received.**

Change Request Schedule

Business Unit: UTMBG Purchase Order: 0000161345 Requisition: 0000168594

Line: 2
Schedule: 1


Due Date: 06/01/2006 New Due Date: 

Ship To: UTMB Central Receiving New Ship To: 

Quantity: 50.0000 New Quantity: 25

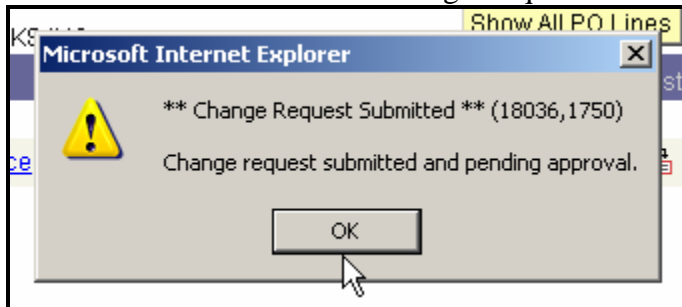
Price: 2.48000 New Price:

Amount: 124.00 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](#)

Click OK to confirm the PO Change Request has been submitted for buyer approval:



To exit this page, click the Return to Requisition Manager Hyperlink:

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

[Return to Requisition Manager](#)

To Increase the Price or Quantity on a Specific Line Item:

As illustrated above, click the checkmark to the right of the appropriate line item to be updated. Click the Justification Comments hyperlink and enter an appropriate comment explaining what is being changed and why.

PO Change Requests to increase the price or quantity will route for approval in the same manner the original requisition routed for approval (department, project, and commodity approval as applicable).

Note: Do not create a PO Change Request to increase the Quantity if:

- The item quantity has already been received and paid in full
- The item is on a blanket order (distributed by Amount)

Click the Details icon:

Create Change Request

Business Unit: UTMBG **Purchase Order:** 0000161367 **Requisition:** 0000168618

PO Date: 07/25/2006 **Buyer:** kcook [Justification Comments](#)

Vendor: PETERS OFFICE EQUIPMENT INC [Show All PO Lines](#)

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

Line	Item ID	Item Description	Cancel PO Line
1		Test of PO change Request - increases	<input type="checkbox"/>

Click the Schedules Details icon:

Change Request Line

Business Unit: UTMBG **Purchase Order:** 0000161367 **Requisition:** 0000168618

PO Line: 1

Unit of Measure: EACH

Description:

New Description:

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

Schedule	Due Date	Ship To	Merchandise Amt		Cancel PO Ship
1	07/25/2006	UTMBR	500.00	USD	<input type="checkbox"/>

Enter the new quantity or price. Then click SAVE:

Change Request Schedule

Business Unit: UTMBG **Purchase Order:** 0000161367 **Requisition:** 0000168618

Line: 1

Schedule: 1

Due Date: 07/25/2006 **New Due Date:**

Ship To: UTMB Central Receiving **New Ship To:**

Quantity: 10.0000 **New Quantity:**

Price: 50.00000 **New Price:**

Amount: 500.00 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](#)

Click Continue to save the change request:

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.

Click the Submit for Approval button to route this request to the appropriate ePro approvers:

Select Requisition Line for Change Request

Business Unit: UTMBG **Requisition ID:** 0000168618

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

Req Line	Item Description	PO Number	PO Line	PO Date	Vendor Name	
1	Test of PO change Request - increases	0000161367	1	07/25/2006	PETERS OFFICE EQUIPMENT INC	✓

The PO Change Request will route in the same manner as the original requisition. Each applicable ePro approval level must approve or deny this request.

If a PO Change Request is **denied by an ePro approver**, the PO Change Request notification will route back to the end-user that created the request via their PeopleSoft Worklist:

Worklist for kcook: Cook, Karen

[Detail View](#) Work List Filters:

From	Date From	Work Item	Worked By Activity	Priority	Link
Bonnardel,Jeffery A.	07/26/2006	Transaction Denied	Approval Workflow	<input type="text"/>	ePro Change Req Amt Appr. BUSINESS_UNIT:UTMBG REQ_ID:0000168618_331

Once a PO Change Request has been fully approved in ePro, it routes to the appropriate buyer for review:

- 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

Once approved by the buyer, the PO Change Request is ready for processing. An automated process will run daily to update Purchase Orders. If a PO Change Request has an error status once the automated process runs (i.e., end-user attempted to reduce the quantity of a line item to a quantity less than what has already been received), the Purchasing Help Desk will notify the end-user of the error.

For additional information regarding the PO Change Request process, refer to:

- [How to Track a PO Change Request](#)
- [How to Review and Approve a PO Change Request](#)
- [How the Buyer Approves a PO Change Request](#)