

## How to Track/View a PO Change Requests August 2007

Once a PO Change Request has been created, the end-user can monitor the progress of the request from their Manage Requisitions page in eProcurement.

**Pathway: eProcurement > Manage Requisitions > Inquire Change Request**

Click the Inquire Change Request hyperlink:

### Manage Requisitions

Find a Requisition

|              |  |                |   |
|--------------|--|----------------|---|
| Req Name/ID: | <input type="text" value="000016859"/> | Business Unit: | <input type="text" value="UTMBG"/>      |
| Requester:   | <input type="text"/>                   | Date From:     | <input type="text" value="05/25/2006"/> |
|              |  | Thru Date:     | <input type="text" value="06/01/2006"/> |

▶ More Find Options

| Requisition Name                             | Reg ID     | Bus. Unit | Date       | Status              | Budget | Total      |  |
|--|------------|-----------|------------|---------------------|--------|------------|--|
| ▶ <a href="#">Test - PO Change - Decr...</a> | 0000168594 | UTMBG     | 06/01/2006 | PO(s)<br>Dispatched | Valid  | 487.50 USD |  |
| ▶ <a href="#">Test - PO Chg - Increases</a>  | 0000168593 | UTMBG     | 06/01/2006 | PO(s)<br>Dispatched | Valid  | 92.70 USD  |  |
| ▶ <a href="#">Test - PO Reg - Cancel...</a>  | 0000168592 | UTMBG     | 06/01/2006 | PO(s)<br>Dispatched | Valid  | 820.00 USD |  |

[Create New Requisition](#)  
 [Inquire Change Request](#)  
 [Inquire Receipts](#)  
 [Requisition Report](#)

This page will display all PO Change Requests created by the specified Requester and includes the purchase order number, requisition number, and current status of the request.

The first step is to validate the Requisition Approval Status is “Approved”. Until the request has been approved in ePro, the buyer cannot review the request:

### Change Request List

Sort By:       Change Request Approval Status:

[Customize](#) | [Find](#) | [View All](#) |     
 First  1-6 of 6  Last

| Unit  | PO No.     | Requisition ID | Reviewed                 | Last User to Modify | Last Change Date         | Req Approval Status | Change Request Approved             |  |
|-------|------------|----------------|--------------------------|---------------------|--------------------------|---------------------|-------------------------------------|--|
| UTMBG | 0000161366 | 0000168620     | <input type="checkbox"/> | kcook               | 07/28/2006<br>3:13:51PM  | Approved            | <input checked="" type="checkbox"/> |  |
| UTMBG | 0000161367 | 0000168618     | <input type="checkbox"/> |                     |                          | Approved            | <input type="checkbox"/>            |  |
| UTMBG | 0000161367 | 0000168618     | <input type="checkbox"/> |                     |                          | Denied              | <input type="checkbox"/>            |  |
| UTMBG | 0000161367 | 0000168618     | <input type="checkbox"/> | kcook               | 07/28/2006<br>11:24:17AM | Approved            | <input type="checkbox"/>            |  |
| UTMBG | 0000161369 | 0000168621     | <input type="checkbox"/> |                     |                          | Approved            | <input type="checkbox"/>            |  |
| UTMBG | 0000161371 | 0000168623     | <input type="checkbox"/> | jadorsey            | 07/28/2006<br>3:43:44PM  | Approved            | <input checked="" type="checkbox"/> |  |

Step two is where the buyer reviews the request. The “Reviewed” check box indicates the buyer has reviewed the request. The buyer must also approve this request before the Purchase Order can be updated. Once approved, the “Change Request Approved” box will be checked.

**Change Request List**

Sort By: Unit Change Request Approval Status: All

Customize | Find | View All | First 1-6 of 6 Last

| Unit  | PO No.     | Requisition ID | Reviewed                 | Last User to Modify | Last Change Date     | Req Approval Status | Change Request Approved             |
|-------|------------|----------------|--------------------------|---------------------|----------------------|---------------------|-------------------------------------|
| UTMBG | 0000161366 | 0000168620     | <input type="checkbox"/> | kcook               | 07/28/2006 3:13:51PM | Approved            | <input checked="" type="checkbox"/> |

To view additional details regarding the PO Change Request, click the “detail” icon

**Change Request List**

Sort By: Unit Change Request Approval Status: All

Customize | Find | View All | First 1-6 of 6 Last

| Unit  | PO No.     | Requisition ID | Reviewed                 | Last User to Modify | Last Change Date     | Req Approval Status | Change Request Approved             |
|-------|------------|----------------|--------------------------|---------------------|----------------------|---------------------|-------------------------------------|
| UTMBG | 0000161366 | 0000168620     | <input type="checkbox"/> | kcook               | 07/28/2006 3:13:51PM | Approved            | <input checked="" type="checkbox"/> |

This PO Change Request has already been approved by the buyer, but the automated process has not created the PO Change yet. Note the Process Status shows as “Initialize”:

**Change Request Inquiry**

Business Unit: UTMBG PO Number: 0000161366 Change Order:

Date/Time: 07/28/2006 12:38:10PM User: kcook Reviewed On:

Source: User Change Request

Justification: change of ship to and due date

Customize | Find | View All | First 1-2 of 2 Last

| Line | Schedule | Process Status | Label Text       | New Value  | Req Approval Status | Approval Status |
|------|----------|----------------|------------------|------------|---------------------|-----------------|
| 1    | 1        | Initialize     | Due Date         | 2006-08-01 | Approved            | Approve         |
| 1    | 1        | Initialize     | Ship To Location | M1         | Approved            | Approve         |

Once the automated process has run, the Process Status will change to “Complete” or “Error”:

**Change Request Inquiry**

**Business Unit:** UTMBG **PO Number:** 0000161366 **Change Order:** 1

**Date/Time:** 07/28/2006 12:38:10PM **User:** kcook **Reviewed On:**

**Source:** User Change Request

**Justification:** change of ship to and due date

Customize | Find | View All | First 1-2 of 2 Last

| <u>Line</u> | <u>Schedule</u> | <u>Process Status</u> | <u>Label Text</u> | <u>New Value</u> | <u>Reg Approval Status</u> |
|-------------|-----------------|-----------------------|-------------------|------------------|----------------------------|
| 1           | 1               | Complete              | Due Date          | 2006-08-01       |                            |
| 1           | 1               | Complete              | Ship To Location  | M1               |                            |

The Purchasing Help Desk will be responsible for monitoring this process. They will advise the end-user of any approved PO Change Request that does not successfully process (i.e., end-user attempts to reduce the quantity of a line item to a quantity less than what has already been received). If the end-user prefers to view this information on-line, they can click the View Processing Messages hyperlink:

**Source:** User Change Request

**Justification:** Decrease quantity

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

| <u>Line</u> | <u>Schedule</u> | <u>Process Status</u> | <u>Label Text</u>         | <u>New Value</u> | <u>Reg Approval Status</u> |
|-------------|-----------------|-----------------------|---------------------------|------------------|----------------------------|
| 2           | 1               | Error                 | Purchase Order Quantity 1 |                  |                            |

[Return to Change Request List](#) [View Processing Messages](#) [View Purchase Order](#)

This page will display the type of change requested and why the PO Change was not made:

**Change Order Message Log**

**Business Unit:** UTMBG **PO Number:** 0000157760 **Change Order:**

**Source:** User **Date/Time:** 06/12/2006 11:36:11AM

**Message** <Previous Next>

**Line:** 2 **Schedule Number:** 1 **Field Name:** QTY\_PO

**Message Set Number:** 10220 **Message Number:** 27

**Description:** Cannot change a schedule quantity to be less than the received quantity for that schedule.