

# Change Request Reference Guide

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## 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.

**AggieBuy TEST Site**

Clinton Merritt | 614 | 0.00 USD | Search (Alt+Q)

Documents > Document Search > Search Documents > Status - PO XT0003660

38 of 75 Results

**Under available actions on the Purchase Order Select "Create Change Request" and then "Go"**

**PO/Reference No.** XT0003660 **Revision 0**

**Supplier** VWR SCIENTIFIC

**Status** Purchase Order | Revisions | PO Approvals | Shipments | Change Requests | Receipts | Invoices | Comments | Attachments | History

**General Information**

PO/Reference No. XT0003660  
Revision No. 0  
Supplier Name VWR SCIENTIFIC [more info...](#)  
Purchase Order Date 8/13/2018  
Total 10,900.00  
Owner Department 02-PURS (02-PURS)  
Owner Business Unit 02-Texas A&M University (02)  
Owner Name Randy Linder - Admin  
Owner Phone +1 979-845-9018  
Owner Email randy.linder@tamu.edu  
Requisition Number 2351110 [view](#) | [print](#)

**Document Status**

A/P status Open  
Workflow Completed (8/13/2018 1:41 PM)  
Distribution Fax: +1 770-232-9881  
The system distributed the purchase order using the last time it was distributed.  
Distribution Date/Time 8/13/2018 1:41 PM  
Supplier Sent To Supplier [view](#)

**Line Item Status**

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	Supplier	Receiving	Invoicing	Matching
1 ✓ Mycotoxin <a href="#">more info...</a>	na	EA	5.00	2,000 EA <a href="#">Add discount...</a>	10,000.00 USD	Sent To Supplier	none	none	No Matches
2 ✓ Colestyramine <a href="#">more info...</a>	na	EA	400.00	2 EA <a href="#">Add discount...</a>	800.00 USD	Sent To Supplier	none	none	No Matches
3 ✓ STUFF <a href="#">more info...</a>	NA	EA	100.00	1 EA <a href="#">Add discount...</a>	100.00 USD	Sent To Supplier	none	none	No Matches

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

**Subtotal** 10,900.00  
**Shipping** 0.00

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# Change Request View

This is the summary view of the change request.

The screenshot displays the 'Change Request: 2425782' summary page on the 'AggieBuy TEST Site'. The page is titled 'Summary' and shows the status as 'Draft' with a document total of '18,500.00 USD'. A left sidebar contains navigation links for Home, Shop, Documents, Contracts, Accounts Payable, Suppliers, Sourcing, Reporting, Administer, and Setup. The main content area includes a 'Summary' section with a list of sections (General, Shipping, Billing, Accounting Codes, Internal Notes and Attachments, External Notes and Attachments, Supplier Information, Taxes, Shipping & Handling, Change Request Approvals, and Comments) and a 'General' section with fields for Ordering Department, Business Unit, Cart Name, Share cart, Prepared by, Prepared for, Cart Description/Purpose, Order Category, and Report Reference A. Callouts indicate that certain values are set as defaults and are not editable by the department, and that the 'edit' link is used to modify the General section.

**Change Request: 2425782**  
2018-07-31 jkeel 01 - CR

Status: **Draft**  
Document Total: **18,500.00 USD**  
[View Related Documents](#)  
[What's next for my order?](#)

**Summary**

General ✓  
Shipping ✓  
Billing ✓  
Accounting Codes ✓  
Internal Notes and Attachments ✓  
External Notes and Attachments ✓  
Supplier Information ✓  
Taxes, Shipping & Handling ✓  
Change Request Approvals  
Comments

**External Communication Options**

Resend to Suppliers on Change Request: false  
Resend to ERP System Connections on Change Request: true  
Resend to...: ✓ PCExportERP

**General**

Ordering Department: 02-PURS (02-PURS)  
Business Unit: 02-Texas A&M University (02)  
Cart Name: 2018-07-31 jkeel 01 - CR  
Share cart: ✗  
Prepared by: Clinton Merritt  
Prepared for: Randy Linder - Admin  
Cart Description/Purpose: no value  
Order Category: 1 - Regular  
Report Reference A: no value

[edit](#)

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.

Home Shop Documents Contracts Accounts Payable Suppliers Sourcing Reporting Administer Setup

AggieBuy TEST Site

Clinton Merritt 614 0.00 USD Search (Alt+Q)

Documents > Document Search > Search Documents > Summary - 2425782 - Change Request

Non-Compliant Basis of Award

Select "edit" to add splits or update existing values for the header level account codes.

Fiscal Year	Member ID	Department Code	Account Code	Executive Code	Division Code	College Code	Report Reference C	Report Reference D	Object Code	Class Code	Special Routing1	% of Price
2011	02	02-FISC-OPS Test Default Campus	02-120052-00000 Finc - Accounting Operations	02-FN V.P. & Cio - Finance	02-CO Controller	no value	no value	no value	no value	no value	L Local	5%
2011	06	06-ENTO Texas Agrilife Research	06-121208-00000 Fy08 Entomology R&G	06-AD Associate Deputy Chancellor	06-AG College of Ag & Life Sciences	06-AG Agricultural and Life Sciences	no value	no value	no value	no value	no value	95%

Internal Notes and Attachments

Internal Note Internal Attachments

Size Attached on

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.

Accounting Codes

Fiscal Year	Member ID	Department Code	Account Code	Report Reference C	Report Reference D	Object Code	Special Routing1	% of Price
2011	02	02-FISC-OPS	02-120052-00000				L Local	5
2011	06	06-ENTO	06-121208-00000				no value	95

Split Total 100%

recalculate / validate values show monetary calculations

Recalculate and Save Cancel

In this example we removed the 06 account (above). Shown below is the new account allocations for this PO at the header level.

Site

Documents > Document Search > Search Documents > Summary - 2425782 - Change Request

State Order Number  
Non-Compliant  
Basis of Award

**Billing**

**Accounting Codes**

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

**Internal Notes and Attachments**

Internal Note  
Internal Attachments

Original Requisition Name  
Original Requisition Requestor

**External Notes and Attachments**

Notes to all Customers

## 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’.

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 > Accounting Codes - 2425782 - Change Request

This change request is ready to be submitted.

**Change Request: 2425782**  
2018-07-31 jkeel 01 - CR

Status: Draft  
Document Total: 10,900.00 USD  
View Related Documents  
What's next for my order?

**Change Request**

- Summary
- General
- Shipping
- Billing
- Accounting Codes**
- Internal Notes and Attachments
- External Notes and Attachments
- Supplier Information
- Taxes, Shipping & Handling

**Accounting Codes**

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

**Lines**

**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.

**Accounting Codes**

Fiscal Year: 2011  
Member ID: 02  
Department Code: 02-FISC-OPS  
Account Code: 02-120052-00000

Buttons: [Recalculate and Save](#), [Cancel](#)

Line 1 now shows a different account at the line level and the other lines are the same as header.

**Change Request: 2425782**

Status: Draft  
Document Total: 10,900.00 USD

**Accounting Codes**

Fiscal Year	Member ID	Department Code	Account Code	Report Reference C	Report Reference D	Object Code	Special Routing 1
2011	02	02-FISC-OPS	02-120052-00000	no value	no value	no value	L Local

**Lines**

**VWR SCIENTIFIC**

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

Supplier subtotal: 10,900.00

## 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.

**AggieBuy TEST Site**

Clinton Merritt | 614 | 0.00 USD | Search (Alt+Q)

Documents > Document Search > Search Documents > Summary - 2425782 - Change Request

**Lines**

**VWR SCIENTIFIC** [more info...](#)  
02-VWR INTERNATIONAL INC  
1050 SATELLITE BLVD, SUWANEE, GA 30024 US  
[Add non-catalog item for this supplier...](#)

Contract Number: no value  
PO Number: XT0003660  
Pricing Code: no value  
Quote number: no value

**To add a new item to the PO for the supplier click "Add non-catalog item for this supplier"**

**To edit the quantity only select "edit"**

**To edit description, Catalog No., Qty, Price, Packaging, click on the non-catalog item logo or "more info".**

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
1 Mycotoxin <a href="#">more info...</a> <a href="#">Accounting Codes values have been overridden for this line view/edit</a>	na	EA	5.00	2,000 EA	10,000.00 USD	<a href="#">edit</a>
Commodity Code: 51121903 Digitoxin   4045 Internal Note: no note Internal Attachments: <a href="#">Add Attachments</a> External Note: no note Attachments for supplier: <a href="#">Add Attachments</a>						
2 Colestyramine <a href="#">more info...</a>	na	EA	400.00	2 EA	800.00 USD	<a href="#">edit</a>
Commodity Code: 12352209 Amino acids or its derivatives   4040 Internal Note: no note Internal Attachments: <a href="#">Add Attachments</a> External Note: no note Attachments for supplier: <a href="#">Add Attachments</a>						
3 STUFF <a href="#">more info...</a>	NA	EA	100.00	1 EA	100.00 USD	<a href="#">edit</a>
Commodity Code: 31181704 Internal Note: no note						

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.

[Add non-catalog item for this supplier...](#)

**Non Catalog Item**

**VWR SCIENTIFIC**

**Fulfillment Address** 02-VWR INTERNATIONAL INC: (preferred)  
1050 SATELLITE BLVD  
SUWANEE, GA 30024 US

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

245 characters remaining [expand](#) [clear](#)

[Product Details](#)

Commodity Code: 51121903

Manufacturer Name:

Manufacturer Part No:

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

[Save](#) [Cancel](#)



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

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... Accounting Codes values have been overridden for this line view/edit Commodity Code 51121903 Digitoxin   4045	na	EA	4.00	1,000	EA 4,000.00 USD	edit
2 Colestyramine more info... Commodity Code 12352209 Amino acids or its derivatives   4040	na	EA	400.00	2 EA	800.00 USD	edit

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 the 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

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... Accounting Codes values have been overridden for this line view/edit Commodity Code 51121903 Digitoxin   4045	na	EA	4.00	1,000	EA 4,000.00 USD	edit
2 Colestyramine more info... Commodity Code 12352209 Amino acids or its derivatives   4040	na	EA	400.00	2 EA	800.00 USD	edit

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 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.

**Edit Line**

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
2 Colestyramine	na	EA	400.00	0	800.00 USD

Commodity Code: 12352209  
Amino acids or its derivatives | 4040

Internal Note: 1000 characters remaining  
External Note: 1000 characters remaining

[Save](#) [Cancel](#)

Below shows the quantity adjusted to 0.

**Lines**

**VWR SCIENTIFIC** [more info...](#)  
02-VWR INTERNATIONAL INC  
1050 SATELLITE BLVD, SUWANEE, GA 30024 US  
[Add non-catalog item for this supplier...](#)

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 <a href="#">more info...</a> <small>Accounting Codes values have been overridden for this line <a href="#">view/edit</a></small>	na	EA	4.00	1,000 EA	4,000.00 USD	<a href="#">edit</a>
2 Colestyramine <a href="#">more info...</a>	na	EA	400.00	0 EA	0.00 USD	<a href="#">edit</a>

Commodity Code: 51121903  
Digitoxin | 4045

Internal Note: no note  
Internal Attachments: [Add Attachments](#)  
External Note: no note  
Attachments for supplier: [Add Attachments](#)

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](#)

## 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.

The screenshot shows a web application interface for a change request. The left sidebar contains navigation links: Shop, Documents, Contracts, Accounts Payable, Suppliers, Sourcing, Reporting, Administer, and Setup. The main content area displays a table with three line items. Each item has columns for Product Description, Catalog No, Size / Packaging, Unit Price, Quantity, and Ext. Price. Red arrows point to the 'Add Attachments' buttons for each line item.

Line Item	Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1	Mycotoxin <a href="#">more info...</a> <small>Accounting Codes values have been overridden for this line <a href="#">view/edit</a></small>	na	EA	4.00	1,000 EA	4,000.00 USD
2	Colestyramine <a href="#">more info...</a>	na	EA	400.00	0 EA	0.00 USD
3	STUFF <a href="#">more info...</a>	NA	EA	100.00	1 EA	100.00 USD

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.

This screenshot is identical to the one above, but with a red arrow pointing to the 'edit' button located at the end of the first line item's row.

Input the internal or external notes as shown below and then click save.

**Edit Line**

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

External Note: test123

Save Cancel

Below shows the notes added to the line item.

**AggieBuy TEST Site**

Clinton Merritt 0.00 USD Search (Alt+Q)

Documents > Document Search > Search Documents > Summary - 2425782 - Change Request

**Lines**

**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	na	EA	4.00	1,000	EA 4,000.00 USD
2 Colestyramine	na	EA	400.00	0 EA	0.00 USD

Commodity Code: 51121903 Digitoxin | 4045

Internal Note: test

External Note: test123

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.

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

This change request is ready to be submitted. [Submit Request](#) [Assign Draft](#)

**Change Request: 2425782**  
2018-07-31 10:01 - CR

Status: **Draft**  
Document Total: **4,100.00 USD**  
[View Related Documents](#)  
[What's next for my order?](#)

**Change Request** ▾

**Summary**

General ✓  
Shipping ✓  
Billing ✓  
Accounting Codes ✓  
Internal Notes and Attachm... ✓  
External Notes and Attachm... ✓  
Supplier Information ✓  
Taxes, Shipping & Handling ✓

Change Request Approvals  
Comments  
Attachment Overview

**External Communication Options**

Resend to Suppliers on Change Request: false  
Resend to ERP System: true  
Resend to: POExportERP

**General**

Ordering Department: 02-PURS (02-PURS)  
Business Unit: 02-Texas A&M University (02)  
Cart Name: 2018-07-31 10:01 - CR  
Share cart: ✗  
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: ✗  
Route to Procurement Services: ✗

[History](#)

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-95%	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	L-5%, 95%	L	
	10/14/2018 2:50 PM	Clinton Merritt		Requisition modified	Object Code	-3%, 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	-3%, 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”

Home | Shop | Documents | Contracts | Accounts Payable | Suppliers | Sourcing | Reporting | Administrator | Setup

AggieBuy TEST Site

Clinton Merritt | 614 | 6 | 0.00 USD | Search (Alt+Q)

Documents > Document Search > Search Documents > Summary - 2425782 - Change Request

This change request is ready to be submitted.

[Submit Request](#) [Assign Draft](#)

### Change Request: 2425782

2018-07-31 jkeel 01 - CR

Status: **Draft**  
Document Total: **4,100.00 USD**  
[View Related Documents](#)  
[What's next for my order?](#)

**Change Request**

**Summary**

- General ✓
- Shipping ✓
- Billing ✓
- Accounting Codes ✓
- Internal Notes and Attachm... ✓
- External Notes and Attachm... ✓
- Supplier Information ✓
- Taxes, Shipping & Handling

[Change Request Approvals](#)

[Comments](#)

[Attachment Overview](#)

### Summary

Document Actions | History | Expand All | Collapse All

#### External Communication Options

Resend to Suppliers on Change Request	false
Resend to ERP System Connections on Change Request	true
Resend to...	✓ POExportERP

#### General

Ordering Department	02-PURS (02-PURS)
Business Unit	02-Texas A&M University (02)
Cart Name	2018-07-31 jkeel 01 - CR
Share cart	✗
Prepared by	Clinton Merritt
Prepared for	Randy Linder - Admin
Cart Description/Purpose	
Order Category	1 - Regular
Report Reference A	
Report Reference B	
Pre-Pay & Add	✗

Screen showing change request successfully submitted.

Shop | My Carts and Orders | Open My Active Shopping Cart | Submitted - Change Request

## Change Request Submitted

### Next Steps

You can view or print this at: [Change Request 2425782](#)

- [View Approval Status](#)
- [Search for another item](#)
- [View order history](#)
- [Check the status of an order](#)
- [Return to your home page](#)
- [Create new draft cart](#)

### Change Request Summary

Change Request number	2425782 <a href="#">Quick View</a>
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”.

The screenshot displays the 'Change Request Approvals' interface for Change Request 2425782. The left sidebar contains navigation links: Home, Shop, Documents, Contracts, Accounts Payable, Suppliers, Sourcing, Reporting, Administer, and Setup. The main content area shows the request details: Status: Pending, Document Total: 4,100.00 USD, and a 'View Related Documents' link. Below this, there's a 'Change Request Approvals' section with a 'Show skipped steps' checkbox and an 'Orientation' dropdown set to 'Horizontal'. A timeline of approval steps is shown: Submitted (Clinton Merritt), Department Allocator (Active), Final Dept Approver (Future), Specialized Approvals (Future), Specialized Notification (Future), and PO Initiation (Future). Each step has a 'View approvers' link and an 'Expedite' button. The bottom of the screen shows 'Comments', 'Attachment Overview', and 'PO Preview' sections.

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.

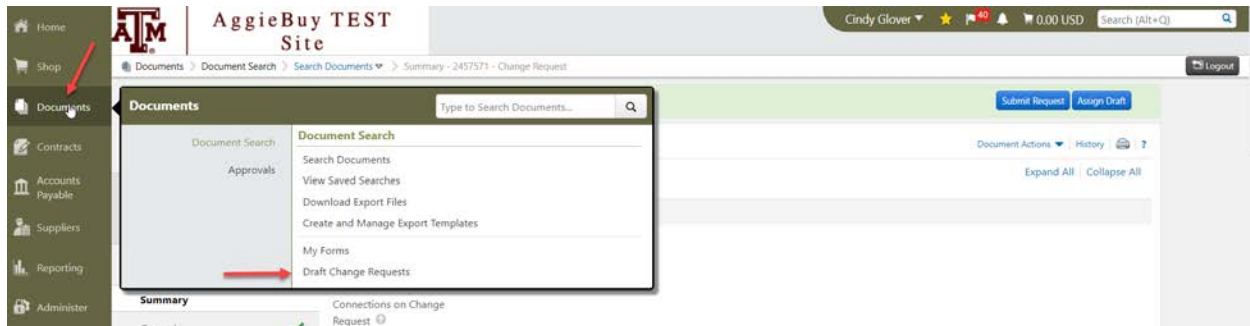
\*If you know that the revised purchase needs to be sent to the vendor you can add that in the internal notes (you would only need to add it on one line item). If you add this note then the buyer/AP staff will not need to contact you to find out if the vendor needs a revised purchase order. When the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

The screenshot shows the 'Draft Change Request Details' for Change Request 2457571. The left sidebar is the same as the previous screenshot. The main content area shows the 'Change Request Details' for a draft request. The status is 'Draft' and the owner is 'Cindy Glover'. The request was created on 11/7/2018. A red arrow points to the 'Change Requests (1)' tab in the navigation bar. The top of the screen shows the user 'Cindy Glover' and a search bar.

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.

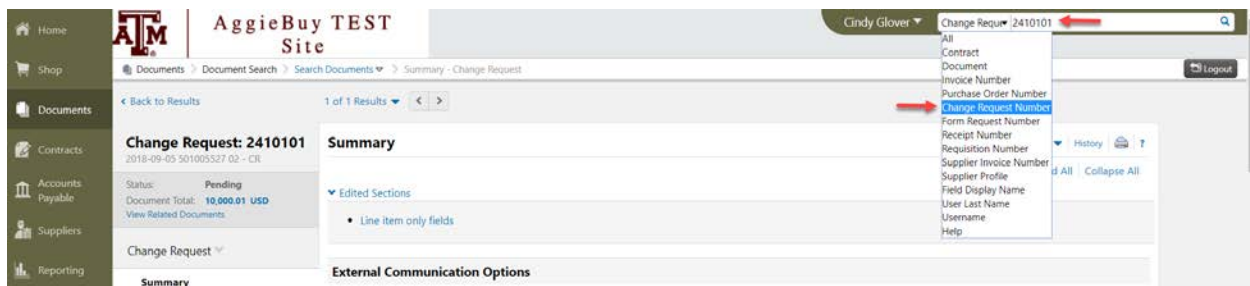


**\*\*\*There can only be one change request in process at a time. If there is an existing DRAFT or PENDING change request on the purchase order you will not have the option to create a new one.**

## 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 'AggieBuy TEST Site' interface. On the left is a navigation menu with 'Documents' highlighted. The main area is titled 'Search Purchase Orders'. It contains several search criteria sections: 'Purchase Order Identification' with a text box for 'Purchase Order Number(s)'; 'Purchase Order Information' with fields for 'Participant(s)' (radio buttons for Any, Me, Pick...), 'Owner', 'Prepared By', 'Approved By', 'Date' (with a 'Creation Date (System)' dropdown), 'Total Amount', 'Supplier', 'Department', 'Business Unit', and 'Change Request Status' (checkboxes for Draft, Pending, Withdrawn, Completed, Returned, Rejected, and No Change Request); and 'Item/Product Information' with fields for 'Catalog Number(SKU)' and 'Product Description'. Red arrows point to the 'Documents' menu item, the 'Search' button, and the 'Change Request Status' section.

## 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 'AggieBuy TEST Site' interface for a specific purchase order. The breadcrumb trail is 'Documents > Document Search > Search Documents > Change Requests - PO XT0002772'. The page title is 'PO/Reference No. XT0002772 Revision 0' and the supplier is 'Dell'. A red arrow points to the 'Change Requests (1)' tab. Below the tabs is a table with one row: 'Status' is 'Draft', 'Change Request Details' includes '2457571', 'Owner' is 'Cindy Glover', and 'Created' is '11/7/2018'. A 'Delete' button with a trash icon is at the end of the row, with a red arrow pointing to it. The 'Available Actions' dropdown shows 'Add Comment' and a 'Go' button.

## Pending Change Request

Submitted by you

Open the change request and from the document actions select Withdraw Change Request

The screenshot shows the AggieBuy TEST Site interface. The user is logged in as Cindy Glover. The page displays a Change Request (2457914) with a status of Pending. The document total is \$50.00 USD. The left sidebar contains navigation links: Home, Shop, Documents, Contracts, Accounts Payable, Suppliers, Reporting, Administer, and Setup. The main content area shows the Change Request Summary, including Edited Sections, External Communication Options, and General information. The Document Actions menu is open, and the 'Withdraw Change Request' option is highlighted with a red arrow.

Document Actions	History
Assign to myself	
Approve/complete step	
Withdraw Change Request	
Add Comment	
Add Notes to History	

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.

The screenshot shows the AggieBuy TEST Site interface. The user is logged in as Cindy Glover. The page displays a Change Request (2457914) with a status of Pending. The document total is \$50.00 USD. The left sidebar contains navigation links: Home, Shop, Documents, Contracts, Accounts Payable, Suppliers, Reporting, Administer, and Setup. The main content area shows the Change Request Summary, including Edited Sections, External Communication Options, and General information. The Document Actions menu is open, and the 'Reject Change Request' option is highlighted with a red arrow.

Document Actions	History
Approve/Complete Step	
Return to Shared Folder	
Return to Requester	
Withdraw Change Request	
Add Comment	
Add Notes to History	
Reject Change Request	