




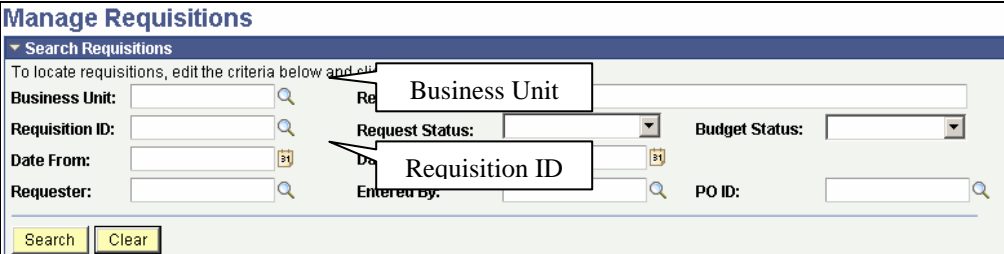



## Request a Change to a Purchase Order

	<p>This job aid instructs the user on how to request a change to a purchase order. The following objective will be covered:</p> <ul style="list-style-type: none"> <li>◆ Inquire on a Requisition to determine its status and Purchase Order number</li> <li>◆ Determine what activity has occurred on a Purchase Order</li> <li>◆ Create a Change Request to modify a Purchase Order that has been Dispatched</li> </ul>
	<p><b>What is a Change Request? When is a Change Request Necessary?</b></p> <p>Once a requisition has been sourced to a purchase order (status is POs Created, POs Dispatched and Received), if a change is necessary, the change must be made to the purchase order by central staff. Operators may request changes by entering a Change Request Requisition.</p> <p>The Change Request Requisition is used to request the following:</p> <ul style="list-style-type: none"> <li>◆ Increases to purchase orders</li> <li>◆ Decreases to purchase orders</li> <li>◆ Add Lines</li> <li>◆ Cancel Lines</li> <li>◆ Change Budget</li> </ul> <p>To accommodate Change Requests, a special eProcurement Requisition form has been created that users can access in the eProcurement Requisition pages.</p> <p>The Change Request eProcurement Requisition serves two main purposes:</p> <ol style="list-style-type: none"> <li>1. As the means to Inform central staff that a change needs to be made to a purchase order</li> <li>2. As the vehicle to authorize the change(s) through Approval Workflow.</li> </ol> <p>Change Requests are not pre-encumbered and will not budget check. Change Requests are approved at the department level and then go to a central staff person, where they are reviewed. Approved Change Requests are then manually input into their corresponding purchase orders. Central staff will document the Change Request in the Header Comments on the purchase order. The Purchase Order will then be budget checked. The Change Request Requisition will be canceled, but will remain in the system for audit purposes.</p> <p>The policy for who is responsible for following up on budget checking errors when they occur on purchase orders may vary by campus.</p>
	<p>The policy for the business process to Close purchase orders (purchase order has had some vouchering activity against it) or Cancel purchase orders (purchase order has had no vouchering activity against it) varies by campus. Your trainer should be able to explain the policy for your campus.</p>



<p><b>Step 1.</b></p>	<p>Log into the e*mpac Application with your FIN Username and Password.</p>
	<p><b>Navigate to the following path:</b></p> <p style="text-align: center;"><b>eProcurement → Manage Requisitions</b></p>
<p><b>Step 2.</b></p>	<p>The <b>Manage Requisitions</b> page appears.</p> 
<p><b>Step 3.</b></p>	<p>Click the <b>Clear</b> button to clear all requisition search criteria.</p> 
<p><b>Step 4.</b></p>	<p><b>Enter</b> the following fields:</p> <ul style="list-style-type: none"> <li>◆ <b>Business Unit</b></li> <li>◆ <b>Requisition ID</b></li> </ul>
	<p>At a minimum, in Production, your search criteria must contain your Business Unit.</p>
<p><b>Step 5.</b></p>	<p>Click the <b>Search</b> button.</p>

The **Manage Requisition** page is updated and Requisition is displayed.

### Manage Requisitions

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

Business Unit:   Requisition Name:

Requisition ID:    Budget Status:

Date From:   Date To:

Requester:   Entered By:   PO ID:

**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="#">000000224</a>	Research Project Laptop	UMAMH	09/11/2006	PO(s) Dispatched		8D <Select Action.. > Go

The PO Status for **Requisition** is PO(s) Dispatched (dispatched). Any change must be requested using the Change Request Requisition form.

**Step 6.** Click the **Requisition ID** link for the **Req ID** to locate the **PO ID**.

The **Requisition Details** page appears.

### Requisition Details

Requisition Name	Requisition ID	Unit	Date	Status	Total
Research Project Laptop	000000224	UMAMH	09/11/2006	PO(s) Dispatched	499.99

Line	Item Description	Source Status	Qty	Price	Total
1	<a href="#">IBM THINKPAD T23 1.13 GHZ PE...</a>	Sourcing Complete	1.0000	Each 499.990 USD	499.99

**Line Comments:**  
<< - WINDOWS XP PRO - 30 GB HARD DRIVE - 128 MB RAM - DVD-ROM, CD-RW DRIVE - 14.1 IN SCREEN - BATTERY LIFE: 3.5 HRS - 5.5 LBS >>

▶ **PO Information**

**PO's have been created for this Requisition. To view the PO details for a specific Requisition line click the triangle on the PO Details bar. If there is no PO Details bar then that Requisition line does not have a PO created for it yet.**

[Return to Manage Requisitions](#) [Requisition Schedule and Distribution](#)


**Step 7.** Click the **Expand Section** icon (▶) for the **PO Information** section of the page.

The **PO Information** section expanded.

PO Information							Find   View All	First	1 of 1	Last
<b>PO No.</b>	<b>PO Status</b>	<b>Vendor</b>	<b>Receipt Status</b>							
0000000260	Dispatched	IBM	PO Not Received							
PO Line Information										
PO Line	Sched #	Due Date	Ship To	PO Qty	Price					
1	1	09/11/2006	GDA0400405	1.0000	499.99000	USD				

**Step 8.** Note the **PO Number**: \_\_\_\_\_


### Look Up PO Activity


 Navigate to the following path:  
**eProcurement → Buyer Center → Inquiries and Reports → PO Inquiry**


The **PO Inquiry Search Criteria** page opens.


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

**Find an Existing Value**


**Business Unit:** =  

**PO ID:** begins with   PO ID

**Contract SetID:** begins with  

**Contract ID:** begins with  


**Release Number:** =


**Purchase Order Date:** =  


**Step 9.** Enter the **PO ID** you want to Inquire about.


**Step 10.** Scroll to the bottom of the page, if needed, and Click the **Search** button.

**PO Status:** =

**Short Vendor Name:** begins with  


**Vendor ID:** begins with  

**Buyer:** begins with  

**Buyer Name:** begins with  

**PO Type:** =

Case Sensitive

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

Search

The **Purchase Order Inquiry** page appears. A Change Order has already been done on this PO.

**PO Info**

**Header**

**Lines**

**Purchase Order Inquiry**

**Purchase Order**

Unit: UMAMH      PO Status: Dispatched  
 PO ID: 0000000260      Budget Status: Valid  
 Change Order: 1

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**Header**

PO Date: 09/11/2006      Backorder Status: None  
 Vendor: IBM-001      Receipt: Not Recvd  
 Vendor ID: 0000000001      [Vendor Details](#)       Hold From Further Processing  
 Buyer: stomasine


**Amount Summary**


Merchandise: 499.99  
 Freight/Tax/Misc.: 0.00  
 Total: 499.99 USD

[Header Details](#)    [All RTV](#)    [Matching](#)  
[Header Comments](#)    [Document Status](#)  
[Change Order](#)    [PO Snapshot](#)

**Select Lines To Display**

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

Line	Item	Item Description	Category	PO Qty	UOM	Amount	Status
1		IBM THINKPAD T23 1.13 GHZ PENT	741400	1.0000	EA	499.99 USD	Active

 This Purchase Order has only one **Line item**.

**Step 11.** Examine the **Purchase Order** section of the page.

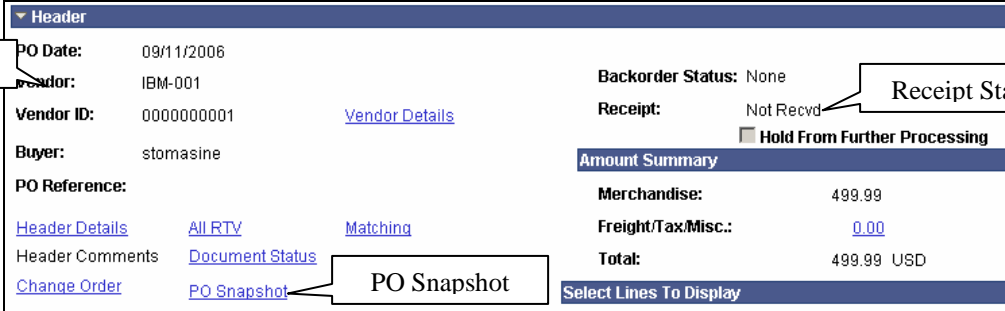

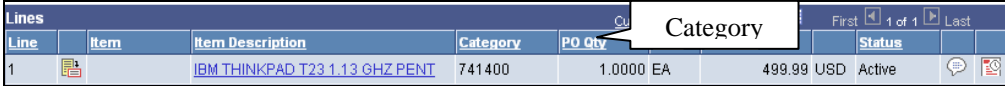


**Purchase Order Inquiry**

**Purchase Order**

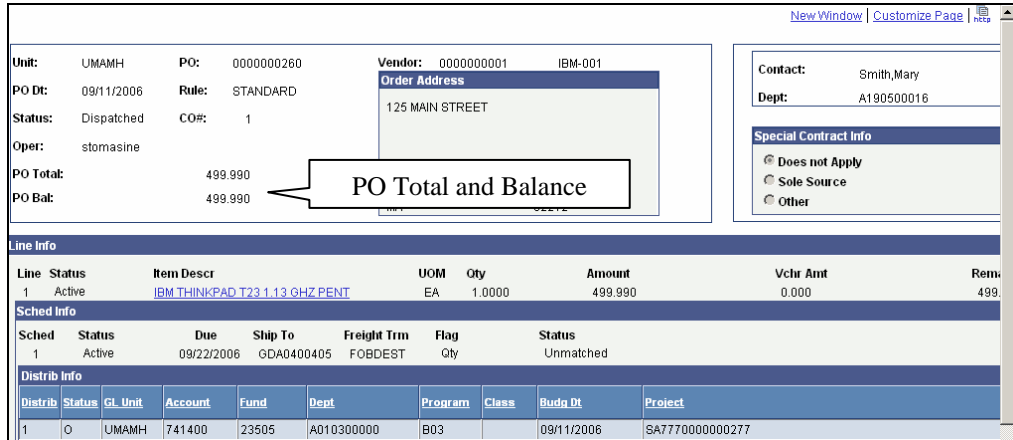
Unit: UMAMH      PO Status: Dispatched  
 PO ID: 0000000260      Budget Status: Valid

 The **PO Status** is **Dispatched**.

**Step 12.** Examine the **Header** section of the page.

	
	<p>The <b>Receipt Status</b> is <b>Not Recvd</b> (not received).</p>
<p><b>Step 13.</b></p>	<p><b>Note</b> the <b>Vendor and Vendor ID</b> below:</p> <ul style="list-style-type: none"> <li>◆ Vendor: _____ (this is the <b>Vendor Short Name</b>).</li> <li>◆ Vendor ID: _____.</li> </ul>
<p><b>Step 14.</b></p>	<p><b>Examine</b> the <b>Lines</b> section of the page.</p> 
	<p>The <b>Category</b> is displayed for <b>Line 1</b>. The <b>Category</b> column displays the <b>Item Category</b> for every <b>Line</b> on the PO.</p>
<p><b>Step 15.</b></p>	<p><b>Note</b> the <b>Category</b> for <b>Line 1</b> below:</p> <ul style="list-style-type: none"> <li>◆ Category: _____</li> </ul>
	<p>The <b>Category</b> and <b>Account Code</b> that you assign to a <b>Change Request Requisition</b> should be the same category and account code that is currently assigned to <b>Line 1</b> on the Purchase Order. This is for workflow purposes.</p>
<p><b>Step 16.</b></p>	<p><b>Click</b> the <b>PO Snapshot</b> link (<b>Header</b> section of the page).</p>

The **PO Snapshot** page appears for the PO. Note that the PO Total and the PO Balance are the same, which is an indication that there has been no vouchering activity on the PO.



Unit: UMAMH PO: 0000000260 Vendor: 0000000001 IBM-001  
 PO Dt: 09/11/2006 Rule: STANDARD Order Address: 125 MAIN STREET  
 Status: Dispatched CO#: 1  
 Oper: stomasine  
 PO Total: 499.990  
 PO Bal: 499.990

Contact: Smith, Mary  
 Dept: A190500016

Special Contract Info  
 Does not Apply  
 Sole Source  
 Other

Line	Status	Item Descr	UOM	Qty	Amount	Vchr Amt	Rem
1	Active	IBM THINKPAD T23 1.13 GHZ PENT	EA	1.0000	499.990	0.000	499.

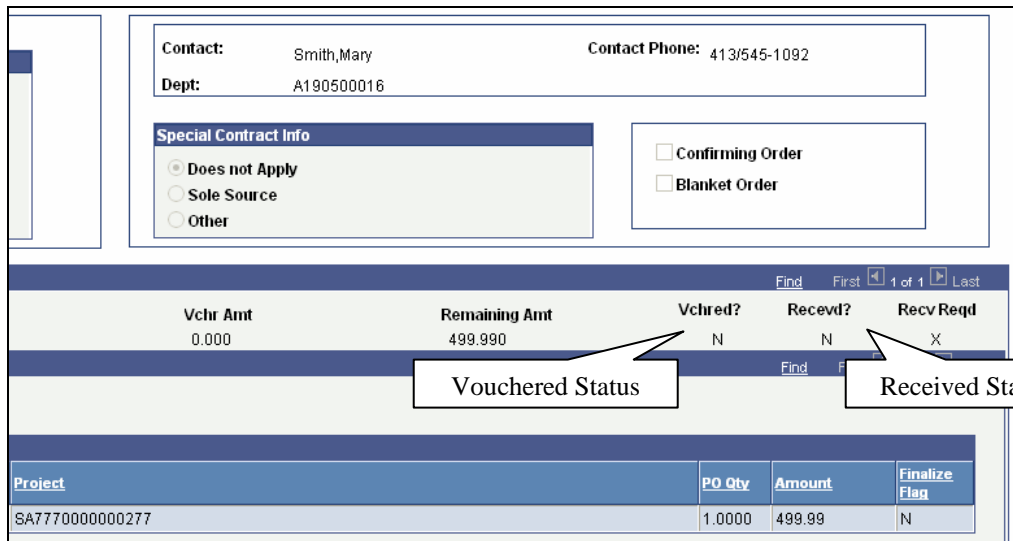
Sched Info  
 1 Active 09/22/2006 GDA0400405 FOBDEST Qty Unmatched

Distrib	Status	GL Unit	Account	Fund	Dept	Program	Class	Budg Dt	Project
1	O	UMAMH	741400	23505	A010300000	B03		09/11/2006	SA7770000000277

PO Total and Balance

**Step 17.** Scroll to the right to view the right side of the **PO Snapshot** page for the PO.

The **right-side** of the **PO Snapshot** page.



Contact: Smith, Mary Contact Phone: 413/545-1092  
 Dept: A190500016

Special Contract Info  
 Does not Apply  
 Sole Source  
 Other

Confirming Order  
 Blanket Order

Vchr Amt	Remaining Amt	Vchred?	Recevd?	Recv Reqd
0.000	499.990	N	N	X

Vouchered Status      Received Status

Project	PO Qty	Amount	Finalize Flag
SA7770000000277	1.0000	499.99	N



There has been no vouchering activity on this PO:

- ◆ The **Recevd Status** (Received status) is **N** (not received).
- ◆ The **Vchred Status** (Vouchered status) is **N** (not vouchered).

**Step 18.** Scroll to the left to view the left-side of the **PO Snapshot** page for the PO.

The **Line Info** (Line Information) section of the page.

Line Info

Line Info										
Line	Status	Item Descr				UOM	Qty	Amount	Vchr Amt	
1	Active	IBM THINKPAD T23 1.13 GHZ PENT				EA	1.0000	499.990	0.000	
Sched Info										
Sched	Status	Due	Ship To	Freight Trm	Flag	Status				
1	Active	09/22/2006	GDA0400405	FOBDEST	Qty	Unmatched				
Distrib Info										
Distrib	Status	GL Unit	Account	Fund	Dept	Program	Class	Budg Dt	Project	
1	O	UMAMH	741400	23505	A010300000	B03		09/11/2006	SA7770000000277	

Distribution Info

**Step 19.** Note the Line information below:

- ◆ Line No.: \_\_\_\_\_.
- ◆ Item Descr: \_\_\_\_\_ (Item Description).
- ◆ Quantity: \_\_\_\_\_.
- ◆ Amount: \_\_\_\_\_.

The **Distrib Info** (Distribution Information) section appears in the **Line Info** section.

Distrib Info									
Distrib	Status	GL Unit	Account	Fund	Dept	Program	Class	Budg Dt	Project
1	O	UMAMH	741400	23505	A010300000	B03		09/11/2006	SA7770000000277

N

The **Chartfields** information is displayed in the **Distrib Info** section of the page.

**Step 20.** Make note of the Chartfields Information below.

- ◆ GL Unit: \_\_\_\_\_.
- ◆ Account: \_\_\_\_\_.
- ◆ Department: \_\_\_\_\_.
- ◆ Fund: \_\_\_\_\_.
- ◆ Program: \_\_\_\_\_.
- ◆ Project: \_\_\_\_\_ (a Grant Account).

**Step 21.** Scroll to the bottom of the page.

**Step 22.** Click the Return button to return to the **PO Inquiry** page.

### Create Change Request Requisition

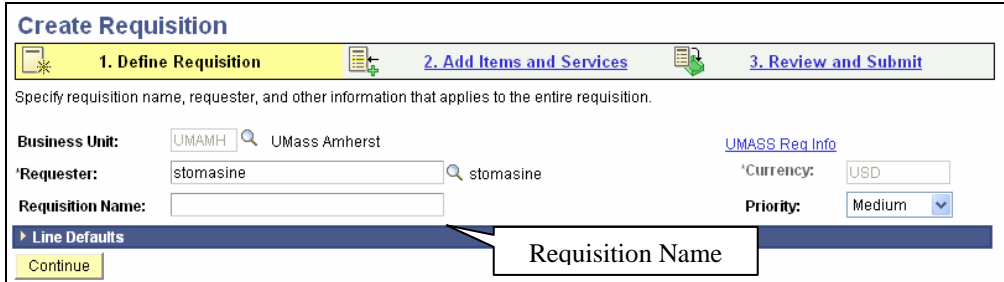

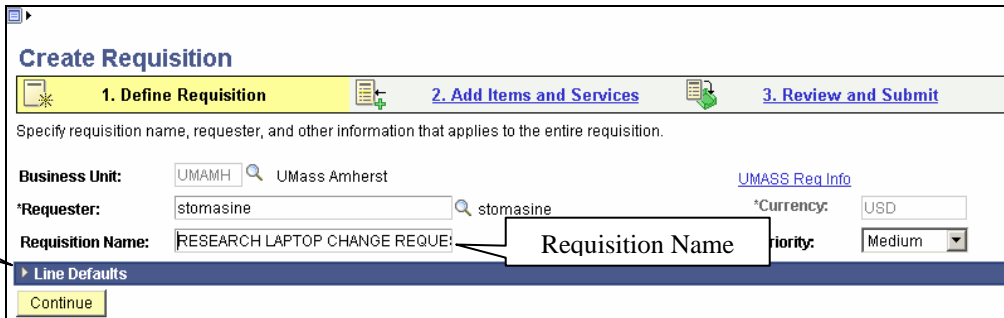

N

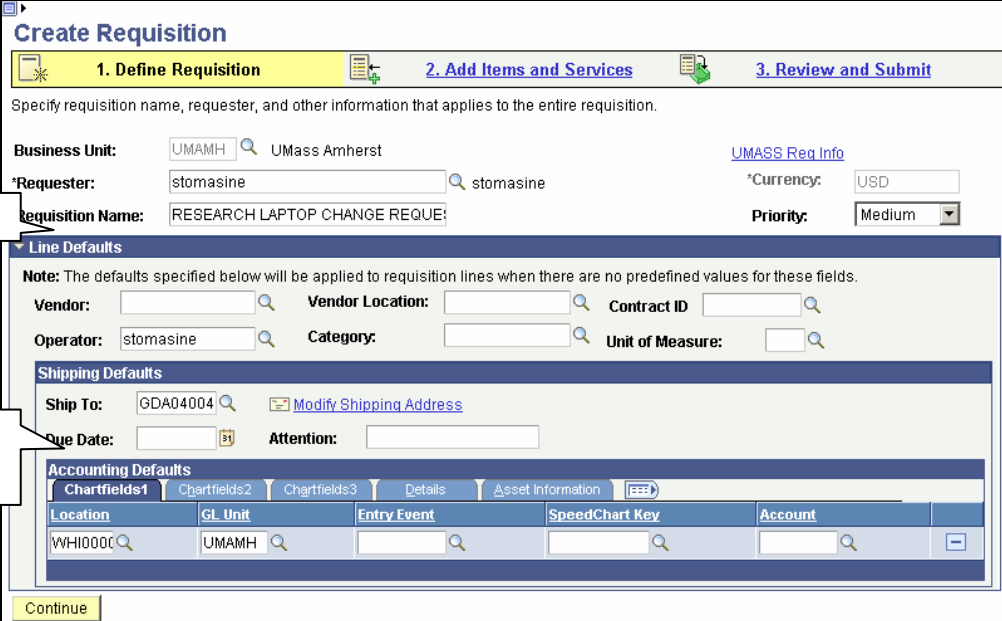

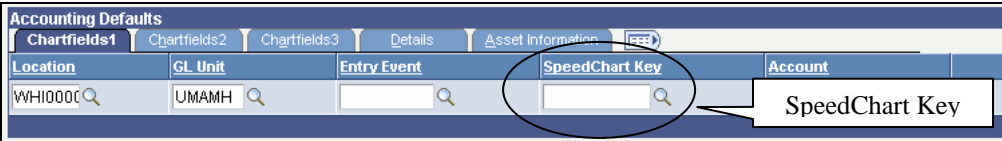

Navigate to the following path:


**eProcurement → Create Requisitions**

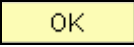
N

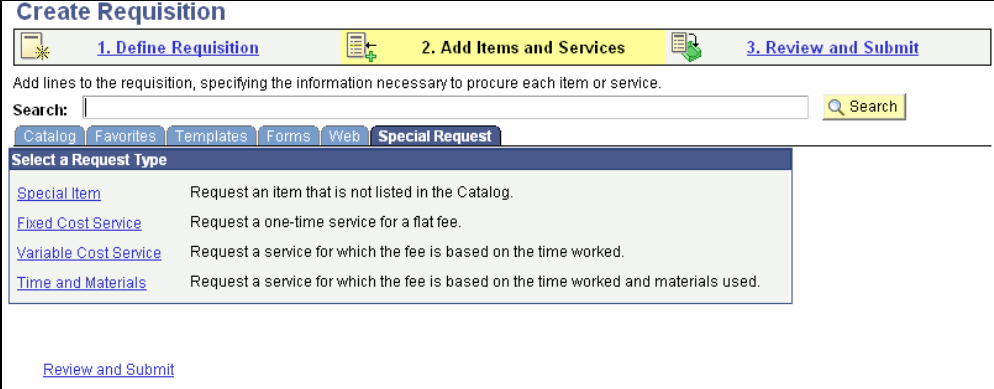
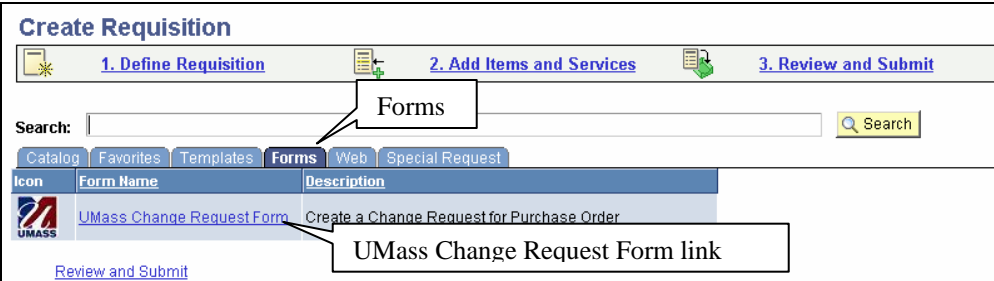
You will now create a **Change Request** using the **Change Request Requisition Form** and the information you previously collected in this exercise. The process for using the **Change Request Requisition Form** is somewhat similar to entering a **Description Only Requisition**.



	<p>The <b>Create Requisition</b> page opens.</p> 
<p><b>Step 23.</b></p>	<p><b>Type</b> in the <b>Requisition Name</b> field.</p>
	<p>You may name the request anything you want, but you should include the words <b>“Change Request”</b> somewhere in your description, to make it easier for everyone to differentiate the Change Request from a regular requisition.</p>
<p><b>Step 24.</b></p> <p>Expand Section</p>	<p>Updated <b>Define Requisition</b> Tab on the <b>Create Requisition</b> page.</p> 
<p><b>Step 25.</b></p>	<p><b>Click the Line Defaults Expand Section</b> icon (  ).</p>

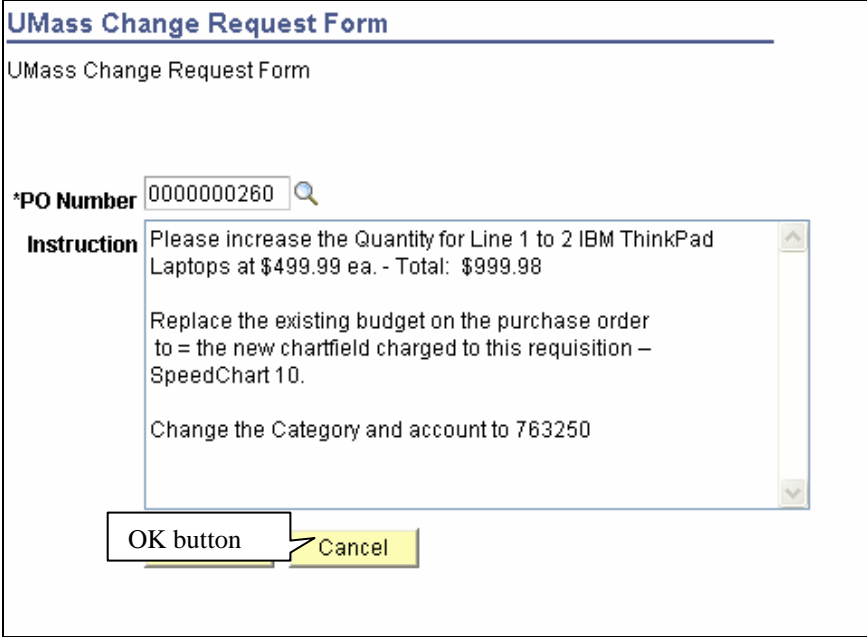

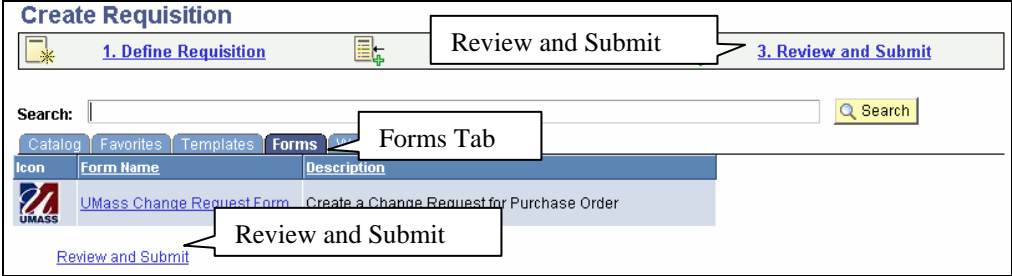
<p>Line Defaults</p> <p>Accounting Defaults</p>	<p>The <b>Line Defaults</b> section of the <b>Create Requisition</b> page expands.</p> 
	<p><b>Caution:</b> All requisitions, including Change Requests, require that Chartfield information be entered or the Requisition cannot be saved (and your Change Request may be lost).</p>
<p>Step 26.</p>	<p>Entering a <b>SpeedChart</b> is the fastest way to enter <b>Chartfield</b> information.</p> <p><b>Scroll down</b> to the <b>Accounting Defaults</b> section.</p> 
	<p><b>Note:</b> (1) If the change is to request, or includes a request, that the <b>budget charged</b> on the purchase order <b>be changed</b> to a different budget, <b>Enter the SpeedChart Key</b> (SpeedChart number) for the <b>new</b> Chartfield in the <b>Accounting Defaults</b> section of the page, and then Tab out of the field.</p> <p>(2) If the change is to request <b>any other type of change</b> to the purchase order, enter the SpeedChart number for the Chartfield that is <b>currently</b> on the purchase order in the <b>Accounting Defaults</b> section of the page, and then Tab out of the field.</p> <p>This is to insure that the <b>proper workflow</b> is initiated at the department level to authorize the Change Request and that it is then routed it to the appropriate central staff person.</p>
<p>Step 27.</p>	<p><b>Enter the SpeedChart Number.</b></p>

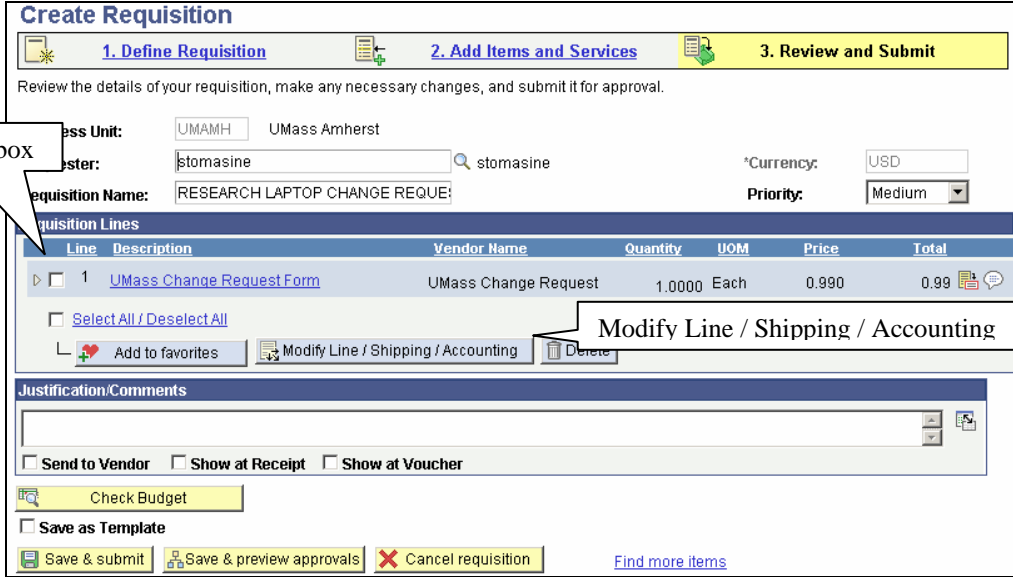


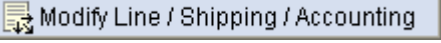
<p><b>Step 28.</b></p>	<p><b>Tab</b> out of field.</p>
<p><b>Step 29.</b></p>	<p><b>Click the <i>UMASS Req Info</i> link.</b></p> <div data-bbox="396 422 1401 699" style="border: 1px solid black; padding: 5px;"> <p><b>Create Requisition</b></p> <p>1. Define Requisition    2. Add Items and Services    3. Review and Submit</p> <p>Specify requisition name, requester, and other information that applies to the entire requisition.</p> <p>Business Unit: <input type="text" value="UMAMH"/> UMass Amherst</p> <p>*Requester: <input type="text" value="stomasine"/> <input type="text" value="stoma"/> <b>UMASS Req Info</b>    Currency: <input type="text" value="USD"/></p> <p>Requisition Name: <input type="text" value="RESEARCH LAPTOP CHANGE REQUE"/>    Priority: <input type="text" value="Medium"/></p> <p>▶ Line Defaults</p> <p><input type="button" value="Continue"/></p> </div> <p>The <b><i>UMASS Req Info</i></b> page opens.</p> <div data-bbox="396 793 1401 1234" style="border: 1px solid black; padding: 5px;"> <p><b>UMASS Req Info</b></p> <p>Business Unit: <input type="text" value="UMAMH"/>    Requisition ID: <input type="text" value="NEXT"/>    <b>Contact Name</b>    <b>Contact Phone</b></p> <p>*Contact Name: <input type="text"/>    *Contact Phone: <input type="text"/></p> <p>*Department <input type="text"/> <input type="text"/>    <b>Department</b></p> <p><b>Special Contract Info</b></p> <p><input checked="" type="radio"/> Does not Apply  <input type="radio"/> Sole Source  <input type="radio"/> Other</p> <p><input type="checkbox"/> Confirming Order  <input type="checkbox"/> Blanket Order  <input type="checkbox"/> State PO Flag</p> </div>
<p><b>Step 30.</b></p>	<p><b>Type</b> the information in the following fields with no spaces:</p> <ul style="list-style-type: none"> <li>◆ <b>Contact Name:</b> LastName,FirstName (for example, Smith,Mary).</li> <li>◆ <b>Contact Phone:</b> Your Department Telephone (for example, 4135459999).</li> <li>◆ <b>Department:</b> Dept ID that best describes the name of your department.</li> </ul> <p>The updated <b><i>UMASS Req Info</i></b> page.</p> <div data-bbox="396 1581 1401 1770" style="border: 1px solid black; padding: 5px;"> <p>Business Unit: <input type="text" value="UMAMH"/>    Requisition ID: <input type="text" value="NEXT"/></p> <p>*Contact Name: <input type="text" value="Smith,Mary"/>    *Contact Phone: <input type="text" value="4135459999"/></p> <p>*Department <input type="text" value="A190500016"/> <input type="text"/></p> </div>
	<p>This information is required. Because this is a <b><i>Change Request</i></b>, no other information is needed on this page.</p>

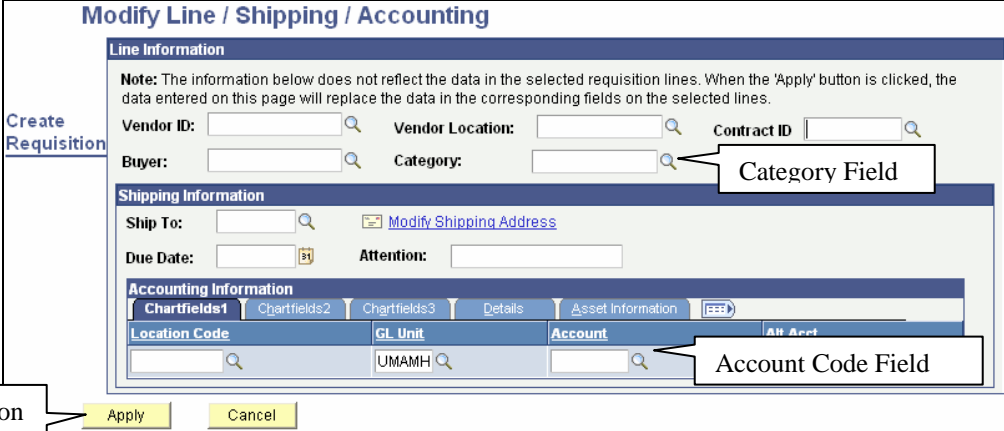
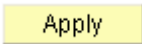
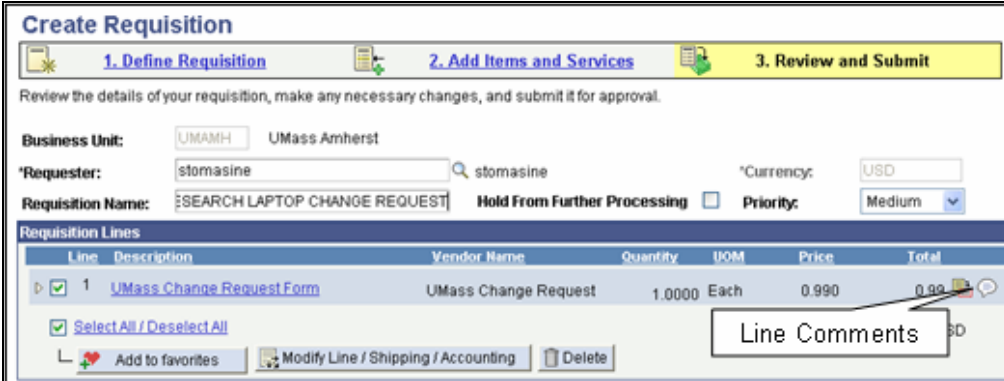

<p><b>Step 31.</b></p>	<p><b>Scroll</b> to the bottom of the page.</p>										
<p><b>Step 32.</b></p>	<p>Click the  button.</p> <p>The <b>Create Requisition</b> page reappears.</p> <div data-bbox="396 529 1401 1150" style="border: 1px solid black; padding: 5px;"> <p><b>Create Requisition</b></p> <p>1. Define Requisition    2. Add Items and Services    3. Review and Submit</p> <p>Specify requisition name, requester, and other information that applies to the entire requisition.</p> <p><b>Business Unit:</b> <input type="text" value="UMAMH"/> UMass Amherst    <a href="#">UMASS Reg Info</a></p> <p><b>*Requester:</b> <input type="text" value="stomasine"/> stomasine    <b>*Currency:</b> <input type="text" value="USD"/></p> <p><b>Requisition Name:</b> <input type="text" value="RESEARCH LAPTOP CHANGE REQUE"/>    <b>Priority:</b> <input type="text" value="Medium"/></p> <p><b>Line Defaults</b></p> <p><b>Note:</b> The defaults specified below will be applied to requisition lines when there are no predefined values for these fields.</p> <p><b>Vendor:</b> <input type="text"/>    <b>Vendor Location:</b> <input type="text"/>    <b>Contract ID:</b> <input type="text"/></p> <p><b>Operator:</b> <input type="text" value="stomasine"/>    <b>Category:</b> <input type="text"/>    <b>Unit of Measure:</b> <input type="text"/></p> <p><b>Shipping Defaults</b></p> <p><b>Ship To:</b> <input type="text" value="GDA04004"/>    <a href="#">Modify Shipping Address</a></p> <p><b>Due Date:</b> <input type="text"/>    <b>Attention:</b> <input type="text"/></p> <p><b>Accounting Defaults</b></p> <table border="1"> <thead> <tr> <th>Location</th> <th>GL Unit</th> <th>Entry Event</th> <th>SpeedChart Key</th> <th>Account</th> </tr> </thead> <tbody> <tr> <td><input type="text" value="WH1000"/></td> <td><input type="text" value="UMAMH"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> </tbody> </table> <p><input type="button" value="Continue"/></p> </div>	Location	GL Unit	Entry Event	SpeedChart Key	Account	<input type="text" value="WH1000"/>	<input type="text" value="UMAMH"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Location	GL Unit	Entry Event	SpeedChart Key	Account							
<input type="text" value="WH1000"/>	<input type="text" value="UMAMH"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>							
<p><b>Step 33.</b></p>	<p>Click the <b>Add Items and Services</b> Tab link.</p> <div data-bbox="396 1241 1401 1339" style="border: 1px solid black; padding: 5px;"> <p><b>Create Requisition</b></p> <p>1. Define Requisition    2. Add Items and Services    3. Review and Submit</p> </div>										

	<p>The <b>Add Items and Services</b> page appears.</p> 
<p><b>Step 34.</b></p>	<p><b>Click on the <i>Forms</i> Tab.</b></p> 
<p><b>Step 35.</b></p>	<p><b>Click the <a href="#">UMass Change Request Form</a> link.</b></p>

	<p>The <b>UMass Change Request Form</b> page appears.</p> <div data-bbox="394 407 1396 982" style="border: 1px solid black; padding: 10px;"> <p><b>UMass Change Request Form</b></p> <p>University of Massachusetts' Change Request Form</p> <p>*PO Number <input type="text"/></p> <p>Instruction <div style="border: 1px solid gray; height: 150px; width: 100%;"></div></p> <p style="text-align: right;"> <input type="button" value="OK"/> <input type="button" value="Cancel"/> </p> </div>
	<p><b>Note:</b> You will now enter the information about the requested change. Please note that you must be as specific and clear as possible in your description of the change. If the instructions are not clear, your request may be denied by central staff and returned to you for clarification.</p>
<p><b>Step 36.</b></p>	<p><b>Click</b> in the <b>PO Number</b> field and <b>Type</b> the <b>PO Number</b></p>
<p><b>Step 37.</b></p>	<p><b>Click</b> in the <b>Instruction</b> field and <b>Type</b> the appropriate comments.</p>
	<p><b>Tip:</b> You should always provide the replacement <b>SpeedChart</b> number when requesting a budget change.</p>

	<p>The updated <b>Change Requisition Form</b>.</p> 
<p><b>Step 38.</b></p>	<p>Click the  button.</p> <p>The <b>Create Requisition</b> page reappears with the <b>Forms</b> Tab selected.</p> 
<p><b>Step 39.</b></p>	<p>Click the <a href="#">Review and Submit</a> link.</p>

	<p>The <b>Create Requisition</b> page, <b>Review and Submit</b> Tab appears.</p>  <p>Select Checkbox</p> <p>Modify Line / Shipping / Accounting</p>
	<p>Note the following system information for the <b>Change Requisition Form</b>:</p> <ul style="list-style-type: none"> <li>◆ The <b>Item Description</b> appears as <b>UMass Change Request Form</b>.</li> <li>◆ The <b>Vendor Name</b> appears as <b>UMass Change Request</b>.</li> <li>◆ The <b>Quantity</b> is <b>1</b>.</li> <li>◆ The <b>Unit of Measure</b> is <b>Each</b>.</li> <li>◆ The <b>Price</b> (Unit Price) is <b>\$0.99</b> (99 cents).</li> <li>◆ The Total (Total Price) is <b>\$0.99</b> (99 cents).</li> </ul> <p>All Change Requests are pre-priced in the system for 99 cents. Change Requests will never budget check. The Budget Check status will stay at 'Not Checked.' Central staff at your campus will review the Change Request, and if there are no issues, the Change Request will be approved and central staff will manually update the purchase order with the requested changes. The Change Request will then be canceled. To verify that your change has been made, you may inquire on the purchase order using PO Inquiry.</p>
<p><b>Step 40.</b></p>	<p>Click the <b>Select Checkbox</b> for <b>Line 1</b> of the <b>Change Request Form</b>.</p> 
<p><b>Step 41.</b></p>	<p>Click the  button.</p>

	<p>The Modify <b>Line / Shipping / Accounting</b> page appears.</p> 
<p><b>Step 42.</b></p>	<p>Click in the <b>Category</b> field.</p>
<p><b>Step 43.</b></p>	<p>Enter the <b>Category</b> field.</p>
<p><b>Step 44.</b></p>	<p>Click in the <b>Account Code</b> field.</p>
<p><b>Step 45.</b></p>	<p>Enter the <b>Account Code</b> field.</p>
<p><b>Step 46.</b></p>	<p>Click the  button.</p> <p>The system will display: “<b>Processing ...</b>”</p> <p>The <b>Create Requisition</b> page reappears.</p> 
<p><b>Step 47.</b></p>	<p>Click the <b>Comments</b> icon () to <b>Line 1</b> to view your Change Request comments.</p>

The **Create Requisition Line Comments** page appears.

**Create Requisition**

**Line Comments**

Line	Description	Quantity	Unit	Price
1	UMass Change Request Form	1.0000	Each	0.990 USD

<< UM10019023>, <Vendor Name: IBM>, <PO BU: UMAMH>, <PO#: 0000000260>, <Instructions: Please increase the Quantity for Line 1 to 2 IBM ThinkPad Laptops at \$499.99 ea. - Total: \$999.98

Replace the existing budget on the purchase order to = the new chartfield charged to this requisition – SpeedChart 10.

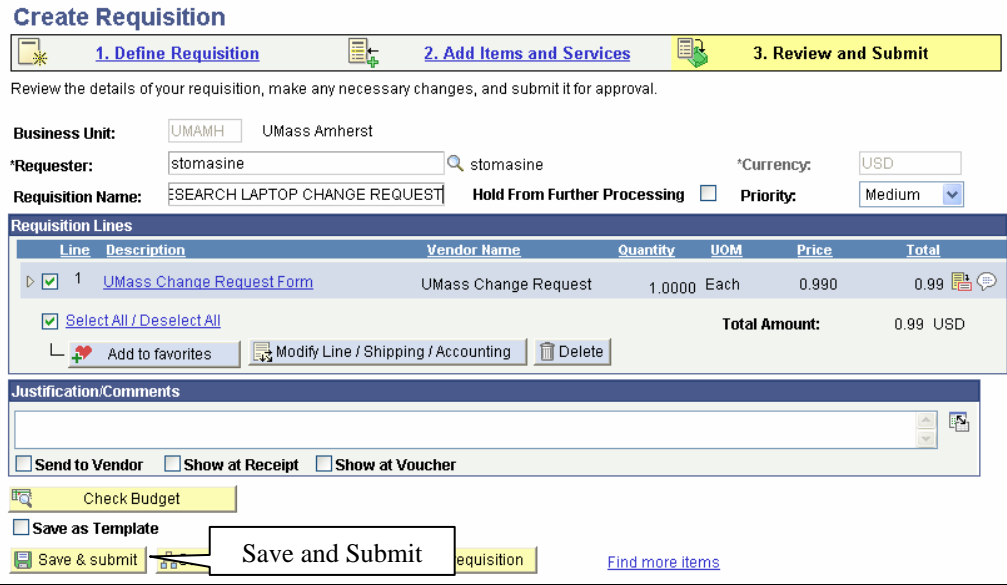


**Send to Vendor**  **Send to Vendor**  **Show at Receipt**  **Show at Voucher**



**Step 48.** **Review** your comments and **Note** the format. The system has added single and double angle brackets (greater than and less than signs) around individual comments and commas between the brackets. Your operator name, the vendor name, the business unit and the PO number, are also reflected in the line, as well as your text. **Check** the **vendor name** against the PO ID, to make sure that you have selected the right order to change.

You may edit the comments if you find a mistake. Disregard the angle brackets; they are added by the system, but not required by the system.

**Note:** The **Send to Vendor** checkbox is auto-selected so that copies of the **Change Request** can be printed - Comments will not print unless the Send to Vendor checkbox is selected. *Always leave this checkbox turned on for all Change Request Requisitions.*

**Step 49.** Click the  button.

	<p>The <b>Create Requisition</b> page reappears.</p> 
	<p><b>Note: Change Request Requisitions do no budget check.</b> The status will remain 'Not Checked' on the Confirmation Page.</p>
<p><b>Step 50.</b></p>	<p>Click the  <b>Save &amp; submit</b> button to save the <b>Change Request Requisition Form</b> and submit it to <b>Workflow</b>.</p> <p>The system will display: “<b>Processing ...</b>”</p>

	<p>The Requisition <b>Confirmation</b> page opens.</p> <div data-bbox="393 407 1385 968" style="border: 1px solid black; padding: 5px;"> <p><b>Confirmation</b></p> <hr/> <table border="0"> <tr> <td><b>Requested For:</b></td> <td>stomasine</td> <td><b>Number of Lines:</b></td> <td>1</td> </tr> <tr> <td><b>Requisition Name:</b></td> <td>Research Laptop CHange Request</td> <td><b>Total Amount:</b></td> <td>0.99 USD</td> </tr> <tr> <td><b>Requisition ID:</b></td> <td>0000000400</td> <td></td> <td></td> </tr> <tr> <td><b>Business Unit:</b></td> <td>UMAMH</td> <td></td> <td></td> </tr> <tr> <td><b>Priority:</b></td> <td>Medium</td> <td></td> <td></td> </tr> <tr> <td><b>Budget Status:</b></td> <td>Not Checked</td> <td></td> <td></td> </tr> </table> <p><b>Department Approval</b></p> <div data-bbox="443 768 1279 957" style="border: 1px solid black; padding: 5px;"> <p>Line 1: Pending <span style="float: right;">+ Start New Path</span></p> <p>UMass Change Request Form</p> <p>Department Approver - Dist 01</p> <table border="0"> <tr> <td style="border: 1px solid black; padding: 2px;"> <p>Pending</p> <p><a href="#">Multiple Approvers</a></p> <p>PO Dept Approver 1 - Dist 1</p> </td> <td style="text-align: center; padding: 0 5px;">→ +</td> <td style="border: 1px solid black; padding: 2px;"> <p>Not Routed</p> <p><a href="#">Multiple Approvers</a></p> <p>PO Dept Approver 2 - Dist 1</p> </td> <td style="text-align: center; padding: 0 5px;">→ +</td> </tr> </table> </div> </div>	<b>Requested For:</b>	stomasine	<b>Number of Lines:</b>	1	<b>Requisition Name:</b>	Research Laptop CHange Request	<b>Total Amount:</b>	0.99 USD	<b>Requisition ID:</b>	0000000400			<b>Business Unit:</b>	UMAMH			<b>Priority:</b>	Medium			<b>Budget Status:</b>	Not Checked			<p>Pending</p> <p><a href="#">Multiple Approvers</a></p> <p>PO Dept Approver 1 - Dist 1</p>	→ +	<p>Not Routed</p> <p><a href="#">Multiple Approvers</a></p> <p>PO Dept Approver 2 - Dist 1</p>	→ +
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	<p><b>Note:</b> Any <b>Approvals</b> that are required for the Change Requisition are displayed. You may view the approvers by clicking on the <a href="#">Multiple Approvers</a> link under the status (Status = Pending). If you were an approver for this requisition, you would need to access the approval page to post your approval by clicking on the <b>Worklist</b> link. Workflow Approvals are covered in detail in the Approval Guide. Workflow setups vary by campus – screen shots of the application pages in this exercise reflect the Training environment only.</p>																												
<p><b>Step 51.</b></p>	<p><b>Note</b> the Requisition ID: _____.</p>																												
<p><b>Step 52.</b></p>	<p><b>Click</b> the <b>Expand Menu</b> icon () to expand the <b>Menu</b>.</p>																												
	<p><b>END OF JOB AID</b></p>																												



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<b>Last Edited Date</b>	<b>3/14/2007</b>
<b>Last Edited By</b>	<b>Kristina England</b>