

SOP #: 4.2.3.1	Area: Purchasing
Title: Creating a Change Request	Effective Date: 03-01-2016
Version #: 1.0	Revision Date: N/A
Approval Date: 02-24-2016	Review Date: N/A


Title: Creating a Change Request

If a change needs to be made on a requisition that has already been sourced to a purchase order and sent to a vendor, a change order can be created.

To create a change request for a requisition, follow the steps below:

1. Enter **EUID** and **Password**.
2. Click **Sign In**.

UNIVERSITY OF NORTH TEXAS SYSTEM



Enterprise Information System

The Enterprise Information System is the primary administrative information resource for the University of North Texas System.

This system is the property of the University of North Texas System and your use of this resource constitutes an agreement to abide by relevant federal and state laws and institutional policies. Unauthorized use of this system is prohibited. Violations can result in penalties and criminal prosecution. Usage may be subject to security testing and monitoring. Users have no expectation of privacy except as otherwise provided by applicable privacy laws.

System Login

EUID (required)

Password (required)

Sign In

Trouble logging in?

[Activate my account](#)

[What's my EUID?](#)

[Reset my password](#)

Scheduled Maintenance

Service may be interrupted during these regular maintenance times:

- Tuesday 7:00 - 9:30 pm
- Thursday 7:00 - 9:30 pm
- Saturday 7:00 pm to noon Sunday

Web Browsers & Settings

Enterprise Information System (EIS) currently supports the following Web browsers and versions:

- Google Chrome 24
- Firefox 17
- Internet Explorer 11, 10, 9, and 8
- Safari 6

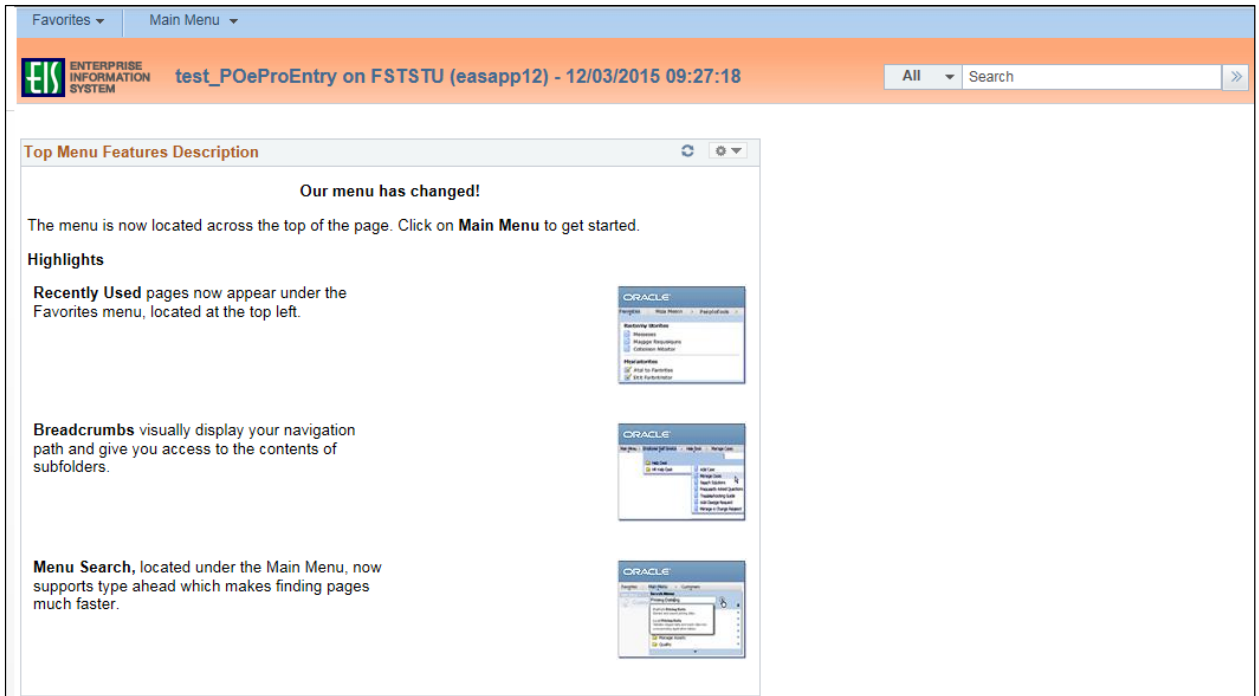
Note: Internet Explorer's Compatibility Mode is unsupported in EIS. Turn off this feature in Internet Explorer under Tools > Compatibility Mode Settings.

To use the Enterprise Information System, set your Web browser to allow JavaScript, accept cookies, and turn off popup blocking.

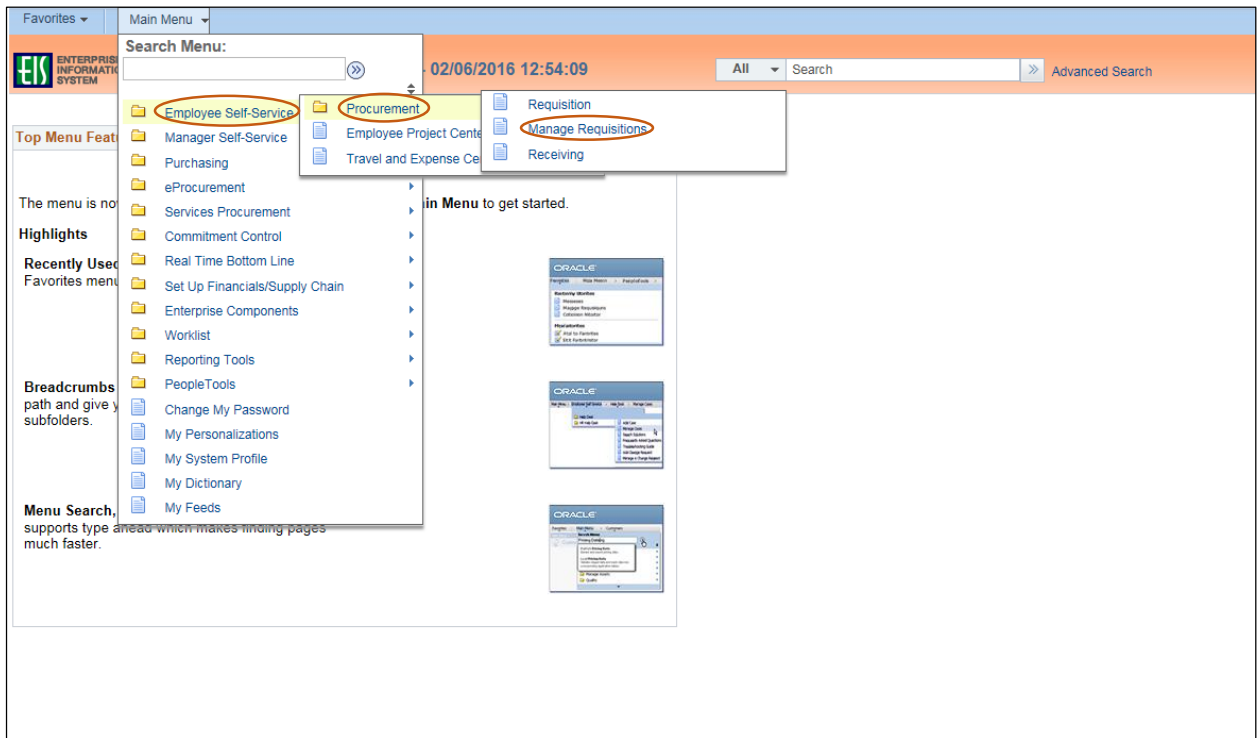
Some documents inside EIS are in PDF format and require the free [Adobe Reader](#) software to open.

[State of Texas](#) • [Statewide Search](#) • [Texas Homeland Security](#) • [Fraud Reporting](#) • [Public Information Act](#) • [Online Institutional Resumes](#)
[University of North Texas](#) • [UNT Health Science Center](#) • [University of North Texas Dallas](#) • [UNT Dallas College of Law](#)
 ©2014 University of North Texas System • Site changes to [System Portal Administration](#) • Last modified August 12, 2014

3. Click **Main Menu**.



4. Navigate to **Manage Requisitions** by clicking on Employee Self-Service>Procurement>Manage Requisitions.



- Verify that the information in the **Business Unit** and **Requester** fields is correct.
- Enter the appropriate search date range into the **Date From** and **Date To** fields.
Note: Leave the **Date From** and/or **Date To** fields blank to expand your search.
- Click **Search**.

Manage Requisitions

Search Requisitions

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

Business Unit: SY769

Requisition Name:

Request State: All but Complete

Budget Status:

Date From: 12/16/2015

Date To: 12/23/2015

Requester: E15203

Entered By:

PO ID:


[Show Advanced Search](#)

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	Request State	Budget	Total		
▶ 0000000115	Computer for Professor ...	SY769	12/21/2015	Open	Not Chk'd	1,150.00 USD	[Select Action]	Go
▶ 0000000114	Comment Test	SY769	12/18/2015	Pending	Valid	100.00 USD	[Select Action]	Go
▶ 0000000113	Computer Desk for Dr. D...	SY769	12/18/2015	Approved	Valid	600.00 USD	[Select Action]	Go
▶ 0000000112	Computer for Professor ...	SY769	12/18/2015	Pending	Valid	1,150.00 USD	[Select Action]	Go

[Create New Requisition](#) [Review Change Request](#) [Review Change Tracking](#) [Manage Receipts](#) [Requisition Report](#)

- Click the triangle icon  next to the **Req ID** to view the current status of the requisition.
Note: The requisition's status screen will open.

Manage Requisitions

Search Requisitions

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

Business Unit: SY769

Requisition Name:

Request State: All but Complete

Budget Status:

Date From: 12/16/2015

Date To: 12/23/2015

Requester: E15203

Entered By:

PO ID:

[Show Advanced Search](#)

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	Request State	Budget	Total		
▶ 0000000115	Computer for Professor ...	SY769	12/21/2015	Open	Not Chk'd	1,150.00 USD	[Select Action]	Go
▶ 0000000114	Comment Test	SY769	12/18/2015	Pending	Valid	100.00 USD	[Select Action]	Go
▶ 0000000113	Computer Desk for Dr. D...	SY769	12/18/2015	Approved	Valid	600.00 USD	[Select Action]	Go
▶ 0000000112	Computer for Professor ...	SY769	12/18/2015	Pending	Valid	1,150.00 USD	[Select Action]	Go

[Create New Requisition](#) [Review Change Request](#) [Review Change Tracking](#) [Manage Receipts](#) [Requisition Report](#)

9. Select **Edit** from the requisition's associated dropdown menu.

The screenshot shows the 'Manage Requisitions' page in the EIS system. The search criteria are: Business Unit SY769, Requisition Name Computer for Professor..., Request State All but Complete, Date From 02/18/2016, Date To 02/19/2016, and Requester E92200. The requisition 000000154 is expanded, showing a status of 'Pending' and a budget of 1,150.00 USD. A dropdown menu is open over the 'Total' column, with 'Edit' selected. The 'Request Lifespan' diagram shows the process from Requisition to Payment. The 'Line Information' table lists two items: Dell Desktop Computer and Dell Keyboard, both with a status of 'Pending Approval'.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
000000154	Computer for Professor ...	SY769	02/19/2016	Pending	Valid	1,150.00 USD	[Select Action] Go
000000153	000000153	SY769	02/19/2016	Open	Valid	10.00 USD	[Select Action] Go
000000152	computer for Dr Phil	SY769	02/18/2016	Pending	Valid	990.00 USD	[Select Action] Go

10. Click **Go**.

The screenshot shows the 'Manage Requisitions' page with search criteria: Business Unit SY769, Requisition Name Computer for Professor..., Request State All but Complete, Date From 12/16/2015, Date To 12/23/2015, and Requester E15203. The requisition 000000113 is expanded, showing a status of 'Valid' and a budget of 600.00 USD. A dropdown menu is open over the 'Total' column, with 'Go' selected. The 'Request Lifespan' diagram shows the process from Requisition to Payment. The 'Line Information' table lists two items: Computer Desk and Dell Printer, both with a status of 'PO Created'.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
000000115	Computer for Professor ...	SY769	12/21/2015	Open	Not Chk'd	1,150.00 USD	[Select Action] Go
000000114	Comment Test	SY769	12/18/2015	Pending	Valid	100.00 USD	[Select Action] Go
000000113	Computer Desk for Dr. D...	SY769	12/18/2015	PO(s) Created	Valid	600.00 USD	[Select Action] Go
000000112	Computer for Professor ...	SY769	12/18/2015	Pending	Valid	1,150.00 USD	[Select Action] Go

11. Click **OK**.

Note: Editing an approved requisition that has already been sourced to a purchase order will send the requisition through the approval process again.

Manage Requisitions

Search Requisitions

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

Business Unit: SY769 Requisition Name: Request State: All but Complete Budget Status: Date From: 02/12/2016 Date To: 02/19/2016 Requirer: E92200 PO ID: Search Clear Show Advanced Search

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	Request State	Budget	Total
0000000154	Computer for Professor ...	SY769	02/19/2016	Pending	Valid	1,150.00 USD
0000000153	0000000153	SY769	02/19/2016	Open	Valid	
0000000152	computer for Dr Phil	SY769	02/18/2016	Pending	Valid	

Create New Requisition Review Change Request Review Change Tracking

Message

This requisition is pending approval. Editing this requisition may reinitiate approval process. (18036,6248)

OK Cancel

12. Change **Ship To**, **Due Date**, or **Quantity** fields as appropriate.

13. Click the item name under the **Description** category.

Edit Requisition - Review and Submit

Review the item information and submit the req for approval.

My Preferences Requisition Settings

Requisition Summary

Business Unit: SY769 Univ. of North Texas System Requisition Name: Computer Desk for Dr. Davis Requisition ID: 0000000113 Priority: Medium Custom Fields

Requester: E15203 Facilities Maintenance

Copy Bid Vendor Delete Bid Vendor Refresh

Cart Summary: Total Amount 600.00 USD

Expand lines to review shipping and accounting details

Add More Items

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Bid Tab	Delete
1	Computer Desk		Summus Industries Inc	1,000	Each	500.0000	500.00			Add	
	Shipping Line 1										
		*Ship To	USB 135	Add Shipto Comments	Quantity	1,000					
		Address	UNT Central Receiving Denton, TX 76205	Add One Time Address	Price	500.0000			Price Adjustment		
		Attention To	Facilities Maintenance						Pegging Inquiry		
		Due Date	12/31/2015						Pegging Workbench		
									Custom Fields		
		Accounting Lines									
2	Dell Printer		Summus Industries Inc	1,000	Each	100.0000	100.00			Add	
	Shipping Line 1										
		*Ship To	USB 135	Add Shipto Comments	Quantity	1,000					
		Address	UNT Central Receiving Denton, TX 76205	Add One Time Address	Price	100.0000			Price Adjustment		
		Attention To	Facilities Maintenance						Pegging Inquiry		
		Due Date	12/31/2015						Pegging Workbench		
									Custom Fields		
		Accounting Lines									

Select All / Deselect All Select lines to: Add to Favorites Add to Template(s) Delete Selected Mass Change

Total Amount 600.00 USD

14. Change the **Quantity** and/or **Amount** as needed.
 15. Type any necessary information in the **Additional Information** field.
- Note:** Do not make changes to any other fields.

Favorites ▾ Main Menu ▾ > Employee Self-Service ▾ > Procurement ▾ > Manage Requisitions > Requisition
 EIS ENTERPRISE INFORMATION SYSTEM mmt0110 on FSTSTU (easapp12) - 12/23/2015 13:48:17 All Search >> Advanced Search

Edit Requisition ?
 Welcome Facilities Maintenance Home My Preferences Requisition Settings | 2 Lines Checkout

Request Options ▾ Search All ▾ Search Advanced Search

All Request Options
 ePro Services
New Requisition
 Web
 Forms
 Favorites
 Recently Ordered
 External Catalogs

New Requisition
 *Goods/Service Description Computer Desk
 Quantity 1 *Unit of Measure EA
 Amount 500.0000 *Currency Code USD
 *Category 204-64
 Supplier ID 0000006227 Suggest New Supplier
 Supplier Name Summus Industries Inc
 Quote Number 888888888 ? Quote Date 12/18/2015
 Beginning Date 12/25/2015 ? Date of Completion 12/31/2015 ?

Additional Information
 Send to Supplier Show at Receipt Show at Voucher
 Apply

16. Click **Apply**.

Favorites ▾ Main Menu ▾ > Employee Self-Service ▾ > Procurement ▾ > Manage Requisitions > Requisition
 EIS ENTERPRISE INFORMATION SYSTEM mmt0110 on FSTSTU (easapp12) - 12/23/2015 13:48:17 All Search >> Advanced Search

Edit Requisition ?
 Welcome Facilities Maintenance Home My Preferences Requisition Settings | 2 Lines Checkout

Request Options ▾ Search All ▾ Search Advanced Search

All Request Options
 ePro Services
New Requisition
 Web
 Forms
 Favorites
 Recently Ordered
 External Catalogs

New Requisition
 *Goods/Service Description Computer Desk
 Quantity 2 *Unit of Measure EA
 Amount 750.00 *Currency Code USD
 *Category 204-64
 Supplier ID 0000006227 Suggest New Supplier
 Supplier Name Summus Industries Inc
 Quote Number 888888888 ? Quote Date 12/18/2015
 Beginning Date 12/25/2015 ? Date of Completion 12/31/2015 ?

Additional Information
 Send to Supplier Show at Receipt Show at Voucher
 Apply

17. Enter change-related comments into the **Requisition Comments and Attachments** field.
18. Enter purchase justification-related comments into the **Approval Justification** field.
19. Click **Check Budget**.

Note: Do not click **Save for Later** since doing so would cause the system to process the requisition without performing a budget check.

Review the item information and submit the req for approval.

Requisition Summary

Business Unit: SY769 Univ. of North Texas System
 Requisition Name: Computer Desk for Dr. Davis
 Requester: E15203 Facilities Maintenance
 Requisition ID: 0000000113
 Priority: Medium
 Currency: USD

Cart Summary: Total Amount 1,600.00 USD

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Bid Tab	Delete
1	Computer Desk		Summus Industries Inc	2,000	Each	750,000	1500.00			Add	
Shipping Line 1											
*Ship To		USB 135		Add Shipto Comments	Quantity	2,000					
Address		UNT Central Receiving Denton, TX 76205		Add One Time Address	Price	750,000		Price Adjustment	Pegging Inquiry		
Attention To		Facilities Maintenance						Pegging Workbench			
Due Date		12/31/2015						Custom Fields			
Accounting Lines											
2	Dell Printer		Summus Industries Inc	1,000	Each	100,000	100.00			Add	
Shipping Line 1											
*Ship To		USB 135		Add Shipto Comments	Quantity	1,000					
Address		UNT Central Receiving Denton, TX 76205		Add One Time Address	Price	100,000		Price Adjustment	Pegging Inquiry		
Attention To		Facilities Maintenance						Pegging Workbench			
Due Date		12/31/2015						Custom Fields			
Accounting Lines											

Total Amount: 1,600.00 USD
Pre-Encumbrance Balance: Not Available

Shipping Summary

Ship To Location: USB 135
 Address: UNT Central Receiving Denton, TX 76205
 Attention To: Facilities Maintenance

Requisition Comments and Attachments

Enter requisition comments

The vendor offered a deal of 2 for \$750, instead of 1 for \$500, so we are now buying 2, and the requisition has been edited accordingly.
 Dept Contact: Sarah I Contact Phone: 940-555-5555 Contact Email: sarahjones@unt.edu I

Send to Supplier Show at Receipt Shown at Voucher

Approval Justification

Enter approval justification for this requisition

Dept Contact: Sarah I Contact Phone: 940-555-5555 Contact Email: sarahjones@unt.edu I
 Special Instructions: Please email the address above when the order ships.
 Purpose Statement: This purchase will allow Professor Davis to conduct cutting edge research which could result in grants and national recognition for the UNT System.

Check Budget Pre-Check Budget Budget Checking Status: Not Checked

Save & submit Save for Later Add More Items Preview Approvals

20. Click **OK**.

Note: Editing an approved requisition that has already been sourced to a purchase order will send the requisition through the approval process again.

The screenshot shows the EIS Requisition page for requisition mmt0110. At the top right, the Total Amount is 1,600.00 USD and the Pre-Encumbrance Balance is Not Available. A message dialog box is open in the center, stating: "This action will restart the approval process. Click OK to continue, or click Cancel to go back. (18036,12207)". The dialog has OK and Cancel buttons. Below the message, the "Requisition Comments and Attachments" section contains a text area with the comment: "The vendor offered a deal of 2 for \$750, instead of 1 for \$500, so we are now buying 2, and the requisition has been edited accordingly." Below this are checkboxes for "Send to Supplier", "Show at Receipt", and "Shown at Voucher". The "Approval Justification" section has a text area with the following text: "Dept Contact: Sarah I Contact Phone: 940-555-5555 Contact Email: sarahjones@unt.edu | Special Instructions: Please email the address above when the order ships Purpose Statement: This purchase will allow Professor Davis to conduct cutting edge research which could result in grants and national recognition for the UNT System." At the bottom, there are buttons for "Check Budget", "Pre-Check Budget", "Save & submit", "Save for Later", "Add More Items", and "Preview Approvals".

21. Click the magnifying glass next to Reason Code.

The screenshot shows the EIS Requisition page with the "Reason Code" field highlighted. The field contains the text "CHGAMT" and a magnifying glass icon. Below the field is a text area for the "Comment" with the text "Req Change Amount". There is a checkbox labeled "Use Same Reason Code" and an "OK" button below it.

22. Select the appropriate **Reason Code** in the **Look Up Reason Code** dropdown based on the reason for changing the requisition.

Enter a reason code and comment for making changes that are being tracked.

Reason Code: CHGAMT

Comment: Req Change Amount

Use Same Reason Code

OK

Look Up Reason Code

SetID: SHARE

Reason Type: Procurement Change

Reason Code: begins with

Description: begins with

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1-3 of 3 Last

Reason Code	Description
CHGAMT	Req Change Amount
CHGDISTRB	Req Change Distribution
CHGQTY	Req QTY Change

23. Enter comments in the **Comment** field.

24. Click **OK**.

Note: The comment window displays a default comment; however, you will need to add additional comments in order to further explain the change to the requisition.

Enter a reason code and comment for making changes that are being tracked.

Reason Code: CHGQTY

Comment: Req QTY Change

We received a discount for purchasing two instead of one.

Use Same Reason Code

OK

Note: The **Confirmation** screen will open.

The change request will be re-routed through the normal approval process.

When an approved requisition has been changed, the system displays the **Change Request/Line Approval Summary** area, which provides details about the changes that have been made to the requisition.

Confirmation

Your requisition has been submitted.

Requested For	Facilities Maintenance	Number of Lines	2
Requisition Name	Computer Desk for Dr. Davis	Total Amount	1,600.00 USD
Requisition ID	000000113	Approval Justification	
Business Unit	SY769	Dept Contact: Sarah I Contact Phone: 940-555-5551	
Status	See Lines	Contact Email: sarahjones@unt.edu Special	
Priority	Medium	Instructions: Please email the address above when the order ships Purpose Statement: This purchase will allow Professor Davis to conduct cutting edge research which could result in grants and national recognition for the UNT System.	
Budget Status	Valid		
Track Batch	1		

[View printable version](#)
[Edit This Requisition](#)
[Check Budget](#)
[Pre-Check Budget](#)

Purchasing Approval

Computer Desk for Dr. Davis: Pending [View/Hide Comments](#) [Start New Path](#)

UNTS Buyer Approval

Pending

Multiple Approvers
Buyer Requisition WF Approval

Comment History

UNTS Dept ID - ePro

Line 1: Initiated [View/Hide Comments](#) [Start New Path](#)

Computer Desk

UNTS Department Approval

Not Routed

Asher, Donna Brooks
ePro Req Dept Manager

Comment History

Line 2: Initiated [View/Hide Comments](#) [Start New Path](#)

Dell Printer

UNTS Department Approval

Not Routed

Asher, Donna Brooks
ePro Req Dept Manager

Comment History

Change Request/Line Approval Summary [Personalize](#) | [View All](#) | 1 of 1

Line	Item Description	Change Request	Line Re-Approval
1	Computer Desk	Created	Routed for Approval

[Apply Approval Changes](#)

[Create New Requisition](#)
[Manage Requisitions](#)