



# **Creating a Change Request**

## **How Do I Change a Hosted Catalog Purchase?**

**Shopping is Easy in ePro!**



# Creating a Change Request for Hosted Catalog Quick Guide

## ePro Requestors:

Requestors have permissions for creating change requests:

- **ePromakes it easy to order additional items as needed! There is no need to create a change request** - Simply follow the process to shop and order from the hosted supplier. See Shoppers and Requestors - Guide for Hosted Catalog Shopping for a quick guide to shopping with a hosted catalog supplier.
- Requestors can submit change requests. On hosted catalog change requests, Requestors can update accounting Chartfields, commodity codes, external notes, and internal notes and attachments.
- **CHANGE ORDERS CANNOT BE USED FOR PRICE OR QUANTITY CHANGE OR TO ADD A NEW LINE FOR CATALOG PURCHASES**
- The Requestor can submit change requests on behalf of Shoppers, who do not have permission to submit change requests.
- Requestors are users who have knowledge of ePro accounting codes and Chartfields. The requestor may need to update the Change Request with these codes before placing an order.
- Responsibilities of a Requestor include following Procurement Guidelines, bid thresholds, validating accuracy of Accounting Chartfields, Ship To information, and Business Purpose.



# How Do I Change a Hosted Catalog Order? Quick Guide

You can create change requests for hosted catalog suppliers by opening your purchase order. Click the ellipses (...) in the top right corner, then click the link to Create Change Request in the drop-down list.

UNT SYSTEM | UNT | hsc | UNT DALLAS

All Search (Alt+Q) 0.00 USD

Purchase Order • Eppendorf North America Inc • NT00000622 Revision 0

Status Summary Revisions 1 Confirmations Shipments Change Requests Receipts Invoices Comments Attachments

Purchase Order: Eppendorf North America Inc

Supplier: Eppendorf North America Inc

Total (199.80 USD)

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.

Item	Amount
Subtotal	199.80
Shipping	0.00
Handling	0.00



# Creating a Change Request Quick Guide

**Create Change Request** [X]

This will create a change request for this purchase order. If you select a user they will receive an email indicating that a change request has been created for this purchase order.

Email notification(s) | [Add recipient](#)

BA Requestor 01 (Prepared by, Prepared for) <UNTS-JaggaerTest@untsystem.edu>

Dept Approver (Approved Requisition) <UNTS-JaggaerTest@untsystem.edu>

User with change request permission:

Amy Melvin (Approved) <Amy.Elliott@untsystem.edu>

Carl Miron ADMIN (Approved) <carl.miron@untsystem.edu>

Lonnika Donson (Approved) <Lon.Patton@untsystem.edu>

UNTS Report User (Approved) <James.Armand@untsystem.edu>

sms0549 (Approved) <▲ Email Missing>

[add email recipient...](#)

Change Request Reason

1000 characters remaining [expand](#) | [clear](#)

Attach file to this change request (optional):

Attachment Type  File

**Create Change Request** Close

## Optional for this form:

- You can send an email notification by clicking the checkbox to the recipient(s) you wish to include.
- You can add attachments to the change request.

## Required for this form:

In the Create Change Request window, enter a Change Request Reason (for instance: changing a ChartField).

Click the Create Change Request button.



# Creating a Change Request Quick Guide

The Change Request is created and ready for additional updates by you.

Change Requests • 3759625

Changes will not be sent to the Supplier.

**Change Request Reason**

Reason	Test hosted catalog change
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General	Shipping	Billing
<b>Cart Name</b>   Ilp - 2023-04-19 barequestor01 - Hosted - CR	<b>Ship To</b> Deliver to: BA Requestor 01 Bldg/Rm: Building A, Room 123 UNT System Bldg Dallas, TX 75201 United States	<b>Bill To</b> Email to: invoices@untssystem.edu UNT System Business Service Center 1112 Dallas Dr. Ste. 4200 Denton, TX 76205 United States
<b>Description</b>   no value	<b>Delivery Options</b>	
<b>Business Unit</b>   University of North Texas (NT752)	Delivery   0152 01XX2 Location   WOOTEN COOLING TOWER	
<b>Budget Date</b>   4/24/2023	Requested Delivery Date   no value	
<b>PR Override</b>   ✗	Expedite   ✗	
<b>Budget Date</b>		
<b>Priority</b>   Normal	Ship Via   Best Carrier-Best Way	
<b>Prepared by</b>   BA Requestor 01		
<b>Prepared for</b>   BA Requestor 01		
<b>Ad-Hoc Approver</b>   Select		

**Draft**

**Total (199.80 USD)**

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	199.80
Shipping	0.00
Handling	0.00
	<b>199.80</b>

**Related Documents**

- Purchase Order: NT00000622
- Requisition: 3755172

**What's next for my order?**

Next Step | Department Approval

Approvers | Approver, Dept Slaughter III, Legrande Mancel



# How Do I Change a Hosted Catalog Order? Quick Guide

You can change internal fields for hosted suppliers by clicking the pencil icon in the section where you need to make a change.

If you need to change the quantity ordered or remove item lines after a purchase order has been sent to a hosted catalog supplier, please contact the supplier for assistance. This will allow you to coordinate adjustments to the existing purchase order with the supplier and will help avoid confusion with the order.

The screenshot displays a hosted catalog order for 'Eppendorf North America Inc' with a total value of 9.99 USD. The main table lists one item: 'Test tube rack for Innova 3100 and C76, Rack for 20 mm tubes' with a quantity of 1 EA and a unit price of 9.99. The 'ITEM DETAILS' section shows manufacturer information for Eppendorf, including the part number AG7-TT20 and a link to the online shop. The 'ACCOUNTING CODES' section at the bottom lists various codes for business units, accounts, departments, and funds. A pencil icon in the 'ITEM DETAILS' section is highlighted with a black arrow, indicating where to click to edit internal fields. A 'Cancel Selected Items' dialog box is also visible in the top right corner.

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 Test tube rack for Innova 3100 and C76, Rack for 20 mm tubes	AG7-TT20	1 EA	9.99	1 EA	9.99

Business_Unit	Speedchart	Account	Department	Fund	Fund Category	Function	Project	PC Business Unit	Activity	Program	Purpose	Site
NT752 University of North Texas	None_NT752 None_NT752	53071 Lab Supplies	225020 Men's Basketball	880003 Intercollegiate Athletics FFF	200 Designated Operating-Managed	630 Scholarships and Fellowships	no value	no value	no value	no value	no value	no value



# How Do I Change a Hosted Catalog Order? Quick Guide

Changing internal information, like ChartField values, Commodity Codes, adding internal notes and attachments, and external notes can be accomplished with the pencil icon. For ChartField changes, clicking the pencil icon opens a popup for your changes. You can verify that the ChartString is valid by clicking the checkmark (✓) icon.

After you complete the changes, click the Save button.

Override Line 1: Accounting Codes

Business_Unit *	Speedchart * <sup>⌵</sup>	Account *	Department * <sup>⌵</sup>	Fund * <sup>⌵</sup>	Fund Category * <sup>⌵</sup>	Function * <sup>⌵</sup>	Project
NT752	None_NT752	53071 Lab Supplies	121100	885000	202	100	

★ Required fields

Save Close

ACCOUNTING CODES Values have been overridden for this line

Business_Unit	Speedchart	Account	Department	Fund	Fund Category	Function	Project	PC Business Unit	Activity	Program	Purpose	Site
NT752	None_NT752	53071	121200	885000	202	100	no value	no value	no value	no value	no value	no value
University of North Texas	NT752_Default	Lab Supplies	Chemistry	Departmental Discretionary	Designated Operating-General	Instruction-General						

What's next for my order?

Next Step Department Approval

Approvers Approver, Dept Slaughter III, Legrande Mancel

Workflow



# How Do I Change a Hosted Catalog Order? Quick Guide

To add Internal Notes, click the pencil icon. A popup will display to allow you to add notes and any additional information. Click Save when your edits are complete.

The screenshot displays the 'Edit Internal Notes And Attachments' popup window. The main page in the background shows the 'Internal Notes and Attachments' section with a pencil icon. The popup contains the following fields:

- Internal Note:** A text input field containing 'Hosted Catalog - Change Request test'. Below the field, it indicates '964 characters remaining' and has 'expand | clear' links.
- Is Supplier a Foreign Vendor?:** A checkbox that is currently unchecked.
- Previous PO:** A text input field with the value 'no value'.
- Purchase Order Category Code:** A dropdown menu with the value '9 Exempt from TBPC'.
- Buyers Only:** A dropdown menu with the value 'Jill Roys - jkr0051'.

At the bottom of the popup, there is a 'Save' button and a 'Close' button. A star icon and the text 'Required fields' are located at the bottom left of the popup.





# How Do I Change a Hosted Catalog Order? Quick Guide

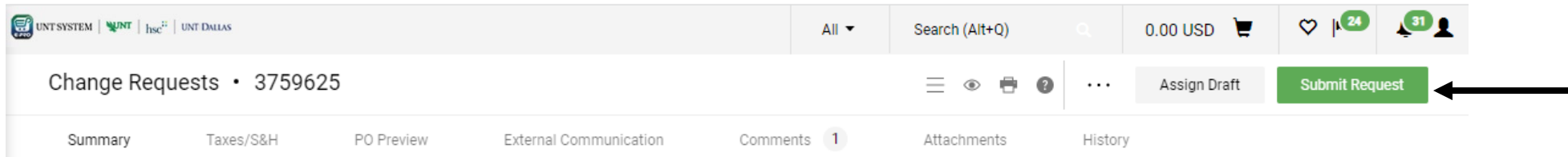
To add attachments, click the Add link. A popup will display to allow you to add your file or link. Click Save Changes when your edits are complete.

The screenshot displays the 'Internal Notes and Attachments' section of the E-PRO system. The background is dimmed, showing fields like 'Internal Note', 'Internal Attachments', 'Is Supplier a Foreign Vendor?', 'Previous PO', 'Purchase Order Category Code', and 'Buyers Only'. An 'Add Attachments' popup window is overlaid on top. The popup has a green header with a close button (X). Below the header, there are radio buttons for 'Attachment Type' with 'File' selected. A 'File(s) \*' field is present, containing a dashed box with the text 'Drop File or Browse' and 'Max. File Size: 24.41 MB'. At the bottom of the popup, there are two buttons: 'Save Changes' (green) and 'Close' (grey). A star icon and the text 'Required fields' are located at the bottom left of the popup. Arrows point from the 'Add' link in the background to the popup, from the 'Browse' link to the file upload area, and from the 'Save Changes' button to the text above.

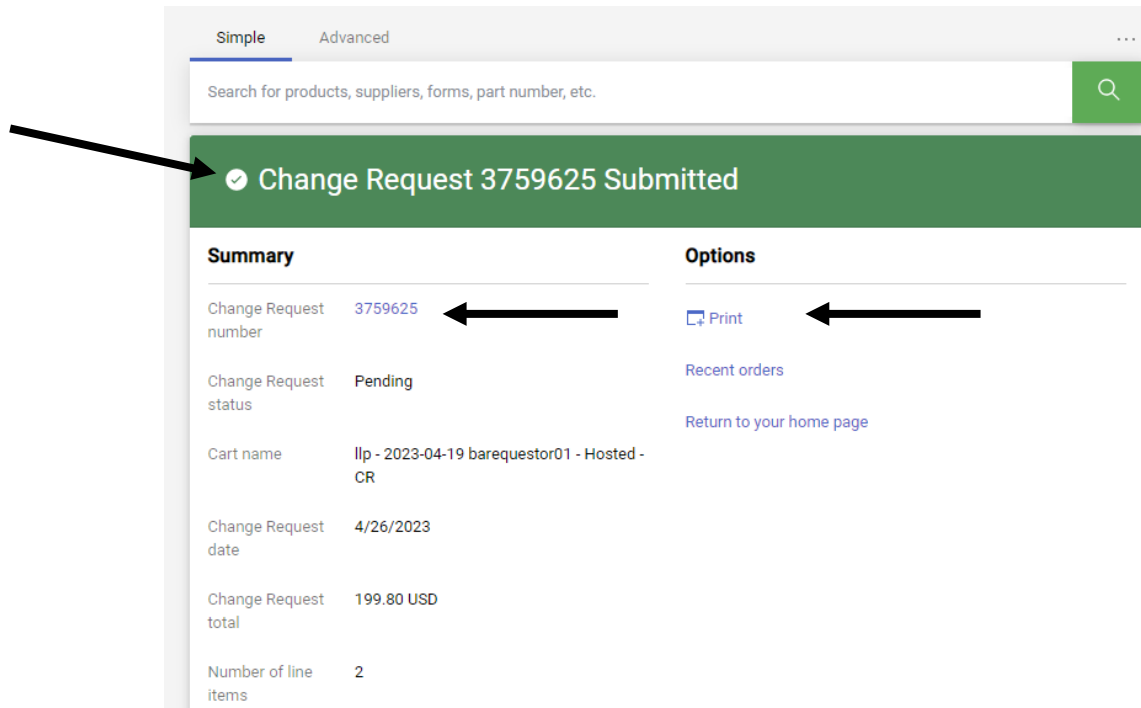


# How Do I Change a Hosted Catalog Order? Quick Guide

When your change request is complete, click the Submit Request button in the top right corner of the screen to submit the change.



A confirmation will be displayed with links to view or print your change request.





# How Do I Change a Hosted Catalog Order? Quick Guide

ePro provides useful information about the status for your change request. The Location icon notifies you of the current workflow step. Clicking blue links in the What's Next section will expand the workflow for you to view approvers.

**Change Request Reason**

Reas on: Test hosted catalog change

**General** ... **Shipping** ... **Billing** ...

Status: Pending (Department Approval)

Submitted: 4/26/2023 1:34 PM

Cart Name: llp - 2023-04-19 barequestor01 - Hosted - CR

Description: no value

Business Unit: University of North Texas (NT752)

Budget Date: 4/24/2023

PR Override: X

**Ship To**

Deliver to: BA Requestor 01  
Bldg/Rm: Building A, Room 123  
UNT System Bldg  
Dallas, TX 75201  
United States

**Delivery Options**

Delivery: 0152 01XX2 WOOTEN COOLING TOWER

Requested Delivery Date: no value

Expedite: X

**Bill To**

Email to: invoices@untsystem.edu  
UNT System Business Service Center  
1112 Dallas Dr. Ste. 4200  
Denton, TX 76205  
United States

**What's next?**

Workflow

- Submitted (4/26/2023 1:34 PM, BA Requestor 01)
- OFAC Check (Completed)
- Initial Validation Request (Completed)
- Department Approval (Active)**
- Final Validation Request (Future)

**Department Approval** (Active)

121200

Dept Approver: UNTS-JaggaerTest@untsystem.edu

Legrande Mancel Slaughter III  
Legrande.Slaughter@unt.edu

121100

Dept Approver: UNTS-JaggaerTest@untsystem.edu

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