



# **Creating a Change Request for a Non-Catalog Item Quick Guide**

**Shopping is Easy in ePro!**



# Creating a Change Request for Non-Catalog Items Quick Guide

## **ePro Requestors:**

Requestors have permissions for creating change requests:

- Requestors can submit change requests. On non-catalog change requests, Requestors can update price, quantity, accounting Chartfields, commodity codes, shipping information, notes and attachments.
- 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.



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From the search bar on the top of ePro screen, search for the PO Number needing a change request. ePro search will allow you to search using a portion of the PO number. As you can see in the example, the system provides multiple ways to search.

Click the link to the PO Number when it is displayed.

The screenshot shows the 'Search Purchase Orders' interface. At the top, there is a search bar with the text '0584' entered. Below the search bar, there is a table with one result. The table has columns for PO Number, Supplier, Created Date/Time, PO Status, Requisition Number, PO Owner, Shipment Status, Matching Status, and Total Amount. The PO Number 'NT00000584' is highlighted in blue. There are two arrows: one pointing to the search bar and another pointing to the highlighted PO number.

PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	PO Owner	Shipment Status	Matching Status	Total Amount
<a href="#">NT00000584</a>	308 Construction, LLC	3/27/2023 3:05:45 PM	Completed	3740086	NT Requestor	Sent To Supplier	No Matches	105,000.00 USD



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From the Purchase Order, click on the three dots in the top right of the screen, and click the link to Create Change Request.

The screenshot displays the E-PRO system interface for a Purchase Order. The breadcrumb trail at the top reads: Purchase Order • 308 Construction, LLC • NT00000584 Revision 0. The main navigation bar includes tabs for Status, Summary, Revisions (1), Confirmations, Shipments, Change Requests, Receipts, Invoices, Comments, Attachments, and History. The 'Status' tab is active. The main content area is divided into two columns: 'General Information' and 'Document Status'. The 'General Information' section includes fields for PO Business Unit (University of North Texas (NT752)), PO/Reference No. (NT00000584), Revision No. (0), Supplier Name (308 Construction, LLC), and Purchase Order Date (3/27/2023). The 'Document Status' section shows PO status as Open and Workflow as Completed (3/27/2023 3:25 PM). A dropdown menu is open in the top right corner, with an arrow pointing to the three dots icon. The menu options are: Add Comment, Create Change Request (highlighted with a green bar and an arrow), Add Notes to History, Create Quantity Receipt, and Print Fax Version. The right sidebar shows 'Details' for the Supplier (308 Construction, LLC).

General Information	
PO Business Unit	University of North Texas (NT752)
PO/Reference No.	NT00000584
Revision No.	0
Supplier Name	308 Construction, LLC
Purchase Order Date	3/27/2023

Document Status	
PO status	Open
Workflow	✓ Completed (3/27/2023 3:25 PM)
The system distributed the purchase order using the method(s) indicated below the last time it was distributed: <a href="#">view</a>	
Manual	



# 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](#)

- AM Approver (Approved Requisition) <UNTS-JaggaerTest@untsystem.edu>
- Budget Approver (Approved Requisition) <UNTS-JaggaerTest@untsystem.edu>
- Buyer one (Approved, Approved Requisition) <UNTS-JaggaerTest@untsystem.edu>
- Dept Approver (Approved Requisition) <UNTS-JaggaerTest@untsystem.edu>
- NT Requestor (Prepared by, Prepared for) <UNTS-JaggaerTest@untsystem.edu>
- Sourcing Coordinator (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>
- Roohia Shahzad (Approved) <RoohiaShahzad@my.unt.edu>
- UNTS Report User (Approved) <James.Armand@untsystem.edu>
- sms0549 (Approved) <⚠ Email Missing>

[add email recipient...](#)

Change Request Reason

**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 also attach files to the change request.

## Required for this form:

In the Create Change Request window, enter a Change Request Reason (for instance: give details for a price change).

Click the Create Change Request button.



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

**Change Requests** • 3753625

Summary Taxes/S&H PO Preview External Communication Comments 1 Attachments History

Changes will not be sent to the Supplier.

**Change Request Reason**

Reason	Price change
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General	Shipping	Billing
<b>Cart Name</b> HUB Test - CR	<b>Ship To</b>	<b>Bill To</b>
<b>Description</b> no value	Deliver to: NT Requestor Bldg/Rm: 213 UNT System Business Service Center Denton, TX 76205 United States	Email to: invoices@untsystem.edu UNT System Business Service Center 1112 Dallas Dr. Ste. 4200 Denton, TX 76205 United States
<b>Business Unit</b> University of North Texas (NT752)	<b>Delivery Options</b>	
<b>Department</b> UNT Denton (NT752)	Delivery Location <b>NTRP H142A</b> DISCOVERY PARK BUILDING	
<b>Budget Date</b> 3/27/2023	Requested Delivery Date no value	
<b>PR Override Budget Date</b> X	Expedite X	
<b>Priority</b> Normal	Ship Via <b>Best Carrier-Best Way</b>	
<b>Prepared by</b> NT Requestor		
<b>Prepared for</b> NT Requestor		
<b>Ad-Hoc Approver</b> Select		

**Draft**

**Total (105,000.00 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	105,000.00
Shipping	0.00
Handling	0.00
	<b>105,000.00</b>

**Related Documents**

- Purchase Order: NT00000584
- Requisition: 3740086

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

Next Step Exception Approval

Approvers Approver, AM  
Chauhan, Asima  
Grounds, Jimmy  
Navapraditar, Joseph  
Shoulders, Ryan



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Click the link for the Item description in the Item section. On the Non-Catalog Item window, make your changes and click the Save button.

The screenshot displays the E-PRO interface. On the left, a list of items is shown under the heading "1 Item". The first item is "308 Construction, LLC · 1 Item · 105,000.00 USD". Below this, under "SUPPLIER DETAILS", there are fields for "Contract" (no value) and "Quote number" (no value). The "Item" section lists "1 HUB Test".

An arrow points from the "HUB Test" link in the item list to the "Non Catalog Item" window. This window is titled "Non Catalog Item" and contains the following details:

- Supplier: 308 Construction, LLC
- Fulfillment Address: 000-Argyle - 11835 Hilltop Rd, Argyle, Texas 76226-3108 United States
- Item details table:

Product Description *	Catalog No.	Quantity *	Price Estimate	Packaging
HUB Test <small>246 characters remaining</small>		1	105,000.00 USD	EA

At the bottom of the window, there is an "Additional Details" section and a "Save" button. An arrow points from the "Save" button to the right.



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After you review your changes, click the Submit Request button in the top right section of the change request. A confirmation will display to confirm the request is successfully submitted.

The screenshot displays the E-PRO user interface. At the top, there is a navigation bar with a search field (Alt+Q), currency (0.00 USD), and notification icons (13 and 126). Below this is a toolbar with icons for menu, eye, print, help, and a 'Submit Request' button highlighted in green with a black arrow pointing to it. The main content area shows a confirmation message: 'Change Request 3753625 Submitted' in a green banner, with a black arrow pointing to it. Below the banner is a 'Summary' table and an 'Options' section.

Summary		Options
Change Request number	3753625	<a href="#">Print</a>
Change Request status	Pending	<a href="#">Recent orders</a>
Cart name	HUB Test - CR	<a href="#">Return to your home page</a>
Change Request date	4/14/2023	
Change Request total	106,000.00 USD	
Number of line items	1	





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You can view the status of your change request by watching the Location icon in the workflow.

The screenshot displays the 'Change Requests' interface for request number 3753625. The main content area is divided into several sections:

- Change Request Reason:** Reason: Price change
- General:** Status: Pending (Exception Approval), Submitted: 4/14/2023 9:54 AM, Cart Name: HUB Test - CR, Description: no value, Business Unit: University of North Texas (NT752), Department: UNT Denton (NT752), Budget Date: 3/27/2023, PR Override Budget Date: X, Priority: Normal, Prepared by: NT Requestor
- Shipping:** Ship To: Deliver to: NT Requestor, Bldg/Rm: 213, UNT System Business Service Center, Denton, TX 76205, United States; Delivery Options: Delivery Location: NTRP H142A, DISCOVERY PARK BUILDING; Requested Delivery Date: no value; Expedite: X; Ship Via: Best Carrier-Best Way
- Billing:** Bill To: Email to: invoices@untsystem.edu, UNT System Business Service Center, 1112 Dallas Dr. Ste. 4200, Denton, TX 76205, United States

On the right side, a 'What's next?' workflow panel shows the following steps:

- Submitted (4/14/2023 9:54 AM, NT Requestor) - Completed
- OFAC Check - Completed
- Initial Validation Request - Completed
- Exception Approval - Active** (highlighted with a location icon and an arrow)
- Purchasing Review - Future
- Department Approval - Future
- Sourcing and Contract - Future