

CREATING & PROCESSING a PO Change Request

FOR REQUESTERS & DEPARTMENT PURCHASING SPECIALISTS ONLY *Revised 2/13/2025* For the **Shopper** Role, please refer to: "<u>Requesting a PO Change Request</u>"



Who Can Create a Change Request?

Change Requests can be created and submitted by a Requester or Department Purchasing Specialist (DPS).

- A Requester or DPS can create change requests for POs within their department access.
 - Default access(visibility) in UDX is determined by employees' HR department.
 - If a Requester or DPS needs expanded department access because they support employees in other departments, a DPS can submit the UDX Access Request form for an Access Update.
 - The request can be for themselves or for another system user and will need to include the department IDs needed.
- A Requester or DPS can create change requests for their own orders and can also create them *on behalf of* Shoppers.
 - When a Shopper "creates" a change request on their Purchase Order, they must select an employee with a Requester or DPS role as a comment recipient.
 - The Requester or DPS the Shopper selects will be notified via e-mail.
 - The Shopper's requested changes will also be documented in the Comments tab of the PO.





The five basic rules of change requests are as follows:

- 1. You can only create a change request on an open, completed purchase order.
- 2. Only one change request can be in process for any PO at a time.
- 3. Change requests go through the same workflow as requisitions. If dollar amounts have been adjusted, the approval workflow will be adjusted for cumulative total dollar amount.
- 4. You cannot change a line that's been fully invoiced and vouchered.
- 5. Always check for the account code since UDX will let you submit a change request without one.

Note: Change Requests should NOT be initiated for the following: Closing or Canceling entire POs, making changes to Catalog Orders.



In This Guide										
All Change Requests begin the same way, as shown in slides <u>4</u>-<u>9</u>.										
Common Reasons for Change Requests are covered in this guide:										
Adding Lines to a PO	<u>10</u>									
Cancelling PO Lines	<u>17</u>									
Changing Quantities on a Line	<u>23</u>									
Changing Prices on a Line	<u>30</u>									
Monitoring Your Change Requests	<u>37</u>									
Changes for catalog orders where change requests are not used	<u>41</u>									

The <u>Advanced Change Request Guide</u> covers:

Changing Funding on a Vouchered PO

Zero Dollar Lines

Form Based POs: Subawards, legacy Waiver of Bids, NPOPs



俞	DELEVERATE EXCHANGE TEST SITE				All 👻	Search (Alt+Q) Q 3,000.00 USD	! ♡ <mark> [©] ↓</mark>
)	Purchase Order • DELWOO	DD TRAILER SALES INC • UDST00068	30 Revision 5			≡ ··· 1 of 1	Results 👻 < >
 16	Status Summary	Revisions 6 Confirmations Shi	pments Change Requests 4	Receipts Vouchers 1 Comments 1	Attachments 2	History	
Ö	Records found: 4				+	Completed	~
	Status	Number	Owner	Created	_	Supplier Status	
	Completed	3035629	Kristen Pickering	8/14/2020		Sent To Supplier	
	Completed	3035664	Kristen Pickering	8/14/2020		Supplier	
\$	Completed	3035495	Kristen Pickering	8/14/2020		DELWOOD TRAILER SALES INC	
ш	Completed	3045455	Kristen Pickering	9/1/2020		Total (17,010.00 USD)	~
						Shipping, Handling, and Tax charges are calo	
						each supplier. The values shown here are for	estimation purposes,

To Create a Change Request in a PO:

Click the Change Requests tab.

Click '+' sign.

Supplier Status	
Sent To Supplier	
Quertine	
Supplier	
DELWOOD TRAILER SALES INC	
Total (17,010.00 USD)	~
Shipping, Handling, and Tax charges are calculated and	d charged by
each supplier. The values shown here are for estimatio	n purposes,
budget checking, and workflow approvals.	
Subtotal	17,010.00
	17,010.00
Related Documents	~
Related Documents Requisition: 3035622	· ·
	·
Requisition: 3035622	•
Requisition: 3035622 Change Requests: 3045455	•
Requisition: 3035622 Change Requests: 3045455 Change Requests: 3035495	000
Requisition: 3035622 Change Requests: 3045455 Change Requests: 3035495 Change Requests: 3035664	
Requisition: 3035622 Change Requests: 3045455 Change Requests: 3035695 Change Requests: 3035664 Change Requests: 3035629	

Powered by JAGGAER | Privacy Policy



Purchase Order •	DELWOOD TRAILER SAL	ESINC • UDST	000680 Revi	sion 5					≣ ⊛ (■
Status Summ	nary Revisions 6	Confirmations	Shipments	Change Requests 4	Receipts	Vouchers 1	Comments 1	Attachments 2	History	Add Comment Create Change Request
General Information	n	💉 Ship	pping Information	on	ø	Billing/Payment		<i>▶</i> ∨		Add Notes to History
PO/Reference No.	UDST000680	Ship	То			Bill To			Details	Cancel PO
Revision No.	5	Unive	versity of Delaware			Accounts Pavable		•	Supplier Status	Finalize Revision Create Quantity Receipt
Priority	Normal YOU	may als	o click	the ellipsis	on th	e PO and	d select		Sent To Supplier	Print Fax Version
Supplier Name		-		equest from					Supplier	Send Test PO
Address	10033 CANTERBURY ROAD			equest nom					DELWOOD TRAILE	Soft Close PO
	FELTON, Delaware 19943-5470 Uni					BillTo Address Code	BillTo		Total (17,010.00	Close PO
Purchase Order Date	8/14/2020	Ship Code	To Address e	NC32		Billing Options				and Tax charges are calculated and charged
Total	17,010.00					Accounting Date	no value			values shown here are for estimation purpose nd workflow approvals.
Requisition Number	3035622 view print	Expe	very Options	×		Payment Terms	0% 0, Net 30		Subtotal	17,010
Purchasing Business Unit	UOD01 UNIVERSITY OF DELAWARE	Ship		A Best Carrier-Best Way		F.O.B.	Destination			17,010
Payment Term Override	×	Requ	uested Delivery	no value					Related Documen	ts
eBuilder Process	no value								Requisition: 303562	
Instance									Change Requests:	
	×								Change Requests: 3	3035664
Multi- Invoice/Payment									Change Requests:	
Invoice/Payment	Test Shopper								What's next?	



â	BURNAR EXCHANGE TEST SITE		All 🔻	Search (Alt+Q) 3,000.00 USD	👻 🗢 🚾 🚛
-	Purchase Order • DELWOOD TRAILER SALES INC • UDST000680 Revision	Create Change Request ×		≡ ··· 1 of	1 Results 👻 < >
ц К	Status Summary Revisions 6 Confirmations Shipments	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.	Attachments 2	History	
Q	Records found: 4	Email notification(s) Add recipient	+	Completed	
AW		Kristen L Pickering (Approved Requisition) <kpick@udel.edu></kpick@udel.edu>		Details	~
Ê	Status Number Ow	Kristen Pickering (Prepared by) <ud-mart@udel.edu></ud-mart@udel.edu>		Supplier Status	
-12	Completed 3035629 Kris	✓ Sam Shopper (Prepared for) <ud-mart@udel.edu></ud-mart@udel.edu>		Sent To Supplier	
	Completed 3035664 Kris	User with change request permission:		Supplier	
In	the Create Change Request Window:	Amy Drag (Approved) <ud-mart@udel.edu></ud-mart@udel.edu>		DELWOOD TRAILER SALES INC	
	ine ereate enange requeet minaem	Christian Aha (Approved) <ud-mart@udel.edu></ud-mart@udel.edu>		Total (17,010.00 USD)	~
S	elect any Recipients from boxes or	Debbie Diversity (Approved) <bgonzal@udel.edu></bgonzal@udel.edu>		Shipping, Handling, and Tax charges are c	
	a tha link to Add Desinionts	Lauren Romeo (Approved) <ud-mart@udel.edu></ud-mart@udel.edu>		each supplier. The values shown here are	
U	se the link to Add Recipients	Test Buyer (Approved) <ud-mart@udel.edu></ud-mart@udel.edu>		budget checking, and workflow approvals	
T۱	pe the Change Request Reason.	add email recipient		Subtotal	17,010.00
	· · ·	Change Request Reason			17,010.00
A	tach a document if necessary.	Increase line 1 to cover expenses for trailer accessories		Dalata d Daramanta	
C	ick Create Change Request.	943 characters remaining expand clear		Related Documents	~
	ich oreate onlange hequest.			Requisition: 3035622	2
		Attach file to this change request (optional):		Change Requests: 3045455	

File

O Link/URL

6

Create Change Request

Close

Attachment Type

Completed
 Powered by IAGGAER | Privacy Poli

0

0 0

 \sim

Change Requests: 3035664

Change Requests: 3035629

What's next?

Workflow Status



E EXCHANGE	TEST SITE								
nange Reques	sts • 3787993						= • 🖶 🕼	••• Assign Draft	Submit Re
Summary	PO Preview External Communication	Comments 1 Attachments 2	History						
i) Changes will n	not be sent to the Supplier.							Draft	
Change Reques	st Reason					<i>.</i> ~	A Be aware of the You may review		
Reason	Increase line 1 to cover expenses for trailer accesso	ories					Total (16,990.00 U	USD) , and Tax charges are calcul	ated and charge
General	ø ····	Shipping		Billing		ø v	each supplier. The	values shown here are for each and workflow approvals.	-
Cart Name	test change order - CR(4)	Ship To		Bill To			Subtotal		16,99
	the default setting supplier SHOULD			U	•••		ation tab		16,99
If the	0	Contractive the revis		ck the Ext	• •		Purchase Order: U	DST000680	16,99
If the Prepared for	sam Shopper CASHIER'S OFFICE (04602)) receive the revis		Billing Options	• •			DST000680	16,99
If the Prepared for Department Ad-Hoc Approver Multi-	supplier SHOULD	Contractive the revision of the series of th		Billing Options	ernal Com		Purchase Order: UI Requisition: 30356	DST000680	16,99
If the Prepared for Department Ad-Hoc Approver Multi-	e supplier SHOULD Sam Shopper CASHIER'S OFFICE (04602) Select	Contractive the revision of the series of th		Billing Options Purchasing Business Unit Payment Term	ernal Com		Purchase Order: UI Requisition: 30356 What's next for m Next Step	y order? COA Approver	
	e supplier SHOULD Sam Shopper CASHIER'S OFFICE (04602) Select	Contractive the revision of the series of th		Elling Options Purchasing Business Unit Payment Term Override	ernal Com		Purchase Order: UI Requisition: 30356 What's next for m Next Step Approver Workflow	y order? COA Approver	
If the Prepared for Department Ad-Hoc Approver Multi- Invoice/Payment	e supplier SHOULD sam Shopper CASHIER'S OFFICE (04602) Select X	Contractive the revision of the series of th		Elling Options Purchasing Business Unit Payment Term Override	ernal Com	munic	Purchase Order: UI Requisition: 30356 What's next for m Next Step Approver Workflow Show sl O Draft Active	Dostrouoseo 22 y order? COA Approver Drag, Amy kipped steps	
If the Prepared for Department Ad-Hoc Approver Multi- invoice/Payment	e supplier SHOULD Sam Shopper CASHIER'S OFFICE (04602) Select X	Contractive the revision of the series of th		Elling Options Purchasing Business Unit Payment Term Override	ernal Com	munic	Purchase Order: UI Requisition: 30356 What's next for m Next Step Approver Workflow Workflow Show sl Open Cartier Active Margot M	Dostrouoseo 22 y order? COA Approver Drag, Amy kipped steps	16,990 □





ñ	WERNER EXCHANGE TEST SITE	All 👻	Search (Alt+Q)	3,000.00 USD 🗎	♡ ²³ ↓ ¹³ ↓
	Change Requests • 3787993		≡ 0	••• Assign Draft	Submit Request
6	Summary PO Preview External Communication Comments 1 Attachments 2 History				
õ	Resend to	~		Draft	
Ω.	Suppliers on Change Request		A Be aware of these You may review a		>
	✓ ERP System Connections on Change Request		Total (16,990.00 US	SD)	~
5	V POExport			nd Tax charges are calcula Ilues shown here are for es	· ·
39				l workflow approvals.	
ահ	Options on the External Communications Tab:				.00
	Resend to Suppliers on Change Request				.00
	Defaults to False (Unchecked)				Ť
	 Set to True (Checked) for anything the supplier needs to receive (updat quantity or price, etc.) 	ted q	uote, chan	ges to	•
	 You do not need to check this box if your request is only making account 	ting c	hanges		

Resend to ERP Connections on Change Request/POExport

• Defaults to True

https://usertest.sciquest.com/apps/Router/ShoppingDashboardUserDetails?tmstmp=1686006208196

- Sends all updates to PeopleSoft
- No need ever to set to False; PeopleSoft will automatically pick up changes



VERNIE EXCHANGE TEST SITE	All ▼ Search (Alt+Q) Q 3,000.00 USD 📜 💝	≫ I <mark>res</mark> 🕇
Change Requests • 3787993	🗮 😰 ···· Assign Draft Si	Submit Request
Summary PO Preview External Communication Comments 1 Attachments 2 H	listory	
Resend to	↓ Draft	
Suppliers on Change Request	Be aware of these issues. You may review and proceed.	>
Comparison of analysis request ERP System Connections on Change Request	Total (16,990.00 USD)	~
V POExport	Shipping, Handling, and Tax charges are calculated an each supplier. The values shown here are for estimatic budget checking, and workflow approvals.	
	Subtotal	16,990.00
Check the Suppliers on Change Request box	to send the revision to the supplier.	16,990.00
Do not uncheck the other two boxes.	Related Documents	~
	Purchase Order: UDST000680	
	Requisition: 3035622	•
	What's next for my order?	~
	Next Step COA Approver	
	Approver Drag, Amy	
	Workflow	Ľ 🖶
	Show skipped steps	
	O Draft	

q



Powered by JAGGAER | Privacy Policy

Changes for Non-Catalog Orders

Adding Lines

(first follow slides 4 through 9)



EXCHANGE TEST SITE						All 👻	Search (Alt+Q)		3,000.00 USD 凄	♡ <mark>×30</mark>
Change Requests • 3787993							= • =	8	••• Assign Draft	Submit Requ
Summary PO Preview External Communication	Comments 1 Attachmer	ts 2 History								
Sourcing Status no value		Additional Notes to print on	PO <i>no value</i>							
Sourcing Event Title no value									Draft	
Sourcing Est. Award Amount no value								of these is review and		
Sourcing Award Date no value							Total (16,99	0.00 USD)	
2 Items						,	 each supplier 	The valu	l Tax charges are calcula es shown here are for es rorkflow approvals.	
DELWOOD TRAILER SALES INC · 2 Items · 16,990.	JO USD					···-	0.14.4.1			16,990.
SUPPLIER DETAILS Contract no value	PO Number UDST0000	580				Add	Non-Catalog Item	J		16,990.
Quote number 1329							Related Doc	uments		
Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price		Purchase Ord	er: UDST(000680	
1 2018 HomesteaderVN#5HABE2427JN066751	824AB	EA	8,495.00	2 EA	16,990.00	…	Requisition: 3	035622		ŧ
							What's next	for my or	der?	
∧ ITEM DETAILS						ell ^a	Next Step		COA Approver	
After selecting the Ext	ternal Communic	ations optic	ons, retu	n to the	Summ	ary ta	ab:		ag, Amy	
Scroll down to the Ite	ms section									Cî 🖷
									ps	
Click the ellipses and	l select Add Nor	-Catalog It	tem.							
		PO Type Override	×					rgot Martin behalf of: S	am Shopper	



BEARWE EXCHANGE TEST SITE	All 🗸 Search (All+O) 2,000,000 👘 💟 🚺
Change Requests • 3787993	Complete Add Non-Catalog Item window with these details:
Summary PO Preview External Communication Comments 1 Attachments 2	1. Description
Sourcing Status no value Ad	2. Supplier Item Number (if available)
Sourcing Event Title no value	3. Quantity
Sourcing Est. Award Amount no value	4. Price
Sourcion Award Date no value	
Add Non-Catalog Item	5. Packaging
	6. Commodity Code
DELWOOD TRAILER SALES INC	7. Select Save to move on or Save and Add Another to
Fulfillment Address	create more lines and repeat the steps above .
MAIN Q - 10033 CANTERBURY ROAD, FELTON, Delaware 19943-5470 United States	
(in the second s	↓ ts ↓
Item	DST000680 😁
Product Description * Supplier Item Number Quantity * Price Estimate	Packaging 22
2019 Homeward trailer 1 7980.00	EA 🗸 V y order? V
233 characters remaining	COA Approver
Additional Details	🗸 Drag, Amy
Commodity Code 25101503 Q	e 13
	kipped steps
* Required fields 🙎 Preferred	Save Save And Add Another Close
	fartin
	PU Type Override A On behalf of: Sam Shopper
	Powered by JAGGAER Privacy Po



â

16

0

血湯

щ В

ар Ф

Q, →

ange Requests • 3787993					≡ ● ● ●	Assign Draft Submit
ummary PO Preview	External Communication Comments 1 Attachments	2 History				
Contract:	no value	Internal Note/Business Justification	no value			Draft
Commodity Code	25101503 / Commercial, Military and Private Vehicles & Components (Automobile)	Internal Attachments	bbA		A Be aware of these issues You may review and proc	
Account Code	167900	External Note	no value		fou may review and proc	.eeu.
	CAPITAL EQUIPMENT	Attachments for supplier		Add	Total (24,970.00 USD)	
		<u>↓</u> EMS+Gator+Trailer+7-13-18.p	pdf			charges are calculated and char
		PO Type Override	×		budget checking, and workf	nown here are for estimation purp low approvals.
ACCOUNTING CODES Work Order Number SpeedType					Subtotal	
Work Order	Purpose F ON PURCI10000 Click the Pencil			etails.	Related Documents Purchase Order: UDST0006	24,
Work Order Number SpeedType N/A PURC1100 N/A R/E PROCUREME SERVICES	Purpose PURC110000 RVE PROCUREMENT SERVICES PROCUREMENT SERVICES PURC110000 Click the Pencil SERVICES ALLOWABLE			etails.	Related Documents Purchase Order: UDST0006 Requisition: 3035622	24 , 80
Work Order Number SpeedType N/A PURC1100 R/A N/A R/E PROCUREME SERVICES 2019 Homeward trailer	Purpose PURC110000 RVE PROCUREMENT SERVICES PROCUREMENT SERVICES PURC110000 Click the Pencil SERVICES ALLOWABLE	to edit the ad	dditional line de		Related Documents Purchase Order: UDST0006 Requisition: 3035622 What's next for my order?	24 , 80
Work Order Number SpeedType N/A PURC1100 N/A R/E PROCUREME SERVICES	Purpose PURC110000 RVE PROCUREMENT SERVICES PROCUREMENT SERVICES PURC110000 Click the Pencil SERVICES ALLOWABLE	to edit the ad	dditional line de		Related Documents Purchase Order: UDST0006 Requisition: 3035622 What's next for my order? Next Step Approvers	24,
Work Order Number SpeedType N/A PURC1100 R/A N/A R/E PROCUREME SERVICES 2019 Homeward trailer ^ ITEM DETAILS	Purpose F ON PURC110000 R/E ENT PROCUREMENT SERVICES CLOCK the Pencil SERVICES ALLOWABLE	to edit the ac	dditional line de		Related Documents Purchase Order: UDST0006 Requisition: 3035622 What's next for my order? Next Step Approvers	24, 80 COA Approver Drag, Amy Oliver, Susan
Work Order Number SpeedType N/A PURC1100 R/E PPROCUREME SERVICES 2019 Homeward trailer Contract:	Purpose F ON PURC110000 R/E ENT PROCUREMENT SERVICES ALLOWABLE no value 25101503 / Commercial, Military and Private Vehicles & Components	to edit the ac	dditional line de		Related Documents Purchase Order: UDST0006 Requisition: 3035622 What's next for my order? Next Step Approvers	24, 80 COA Approver Drag, Amy
Work Order Number SpeedType N/A PURC1100 R/E PROCUREME SERVICES 2019 Homeward trailer Contract: Commodity Code	Purpose Purpose Click the Pencil Click	EA Internal Note/Business Justification Internal Attachments	dditional line de		Related Documents Purchase Order: UDST0006 Requisition: 3035622 What's next for my order? Next Step Approvers	24, 80 COA Approver Drag, Amy Oliver, Susan



Â

í

Ö

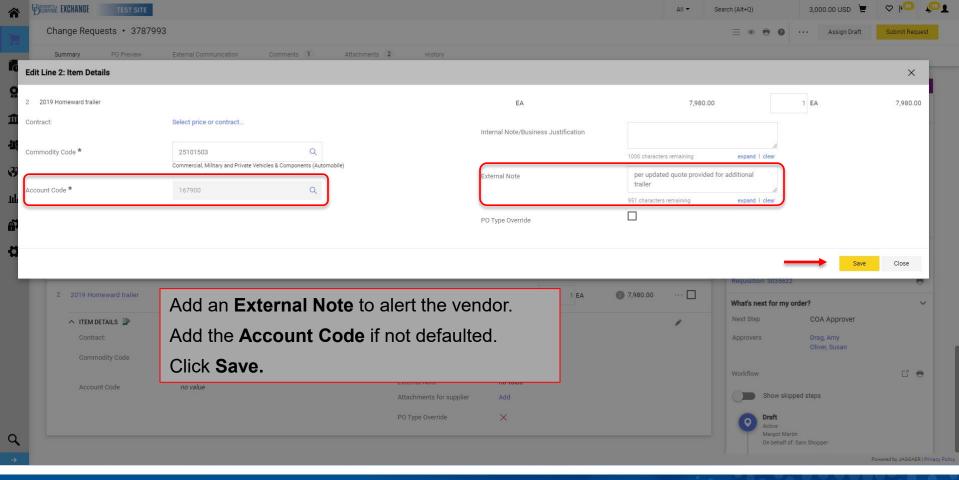
血影

39

ш









₩ Ø	AWARE EXCH	ANGE TEST	SITE										All 🔻	Search (Alt+Q)	3,000.00 USD 📜	o ko 👘
	Change	e Requests •	3787993							Clic	< Subr	nit Re	quest.	≡ ● = 0	Assign Brait	Submit Request
1	Summa	ry PO Prev	iew E	xternal Communicati	ion Comr	nents 1	Attachments	2 His	tory				quest.			
		Contract:		no value				Internal Note Justification		no value					Draft	
ł.		Commodity Code		25101503 / Comr (Automobile)	mercial, Military an	d Private Vehicles	& Components	Internal Atta	chments	Add				A Be aware of thes		>
1		Account Code		167900 CAPITAL EQUIPMEN	IT			External Not		no value			Add	You may review a		~
-								Attachments f	r+Trailer+7-13-18	l.pdf			Auu 	Shipping, Handling, a	and Tax charges are calcula	ated and charged by
7								PO Type Ove	rride	×					alues shown here are for es d workflow approvals.	stimation purposes,
L.	^	ACCOUNTING CODE	ES							Va	lues have been over	rridden for this line	û 🖉 👔	Subtotal		24,970.00
		Work Order Number	SpeedType	Purpose	Fund	Dept	Program	Source	Project ID	Project Type 1	User Ref	Cost Share Project	Project Type 2			24,970.00
		N/A N/A	PURC110000 R/E PROCUREMENT SERVICES	R/E	OPBAS OPERATING BASIC	04750 PROCUREMENT SERVICES	ADALL ADMINISTRATIVE ALLOWABLE	no value	no value	no value	no value	no value	no value	Related Documents	ST000680	•
	2 2	019 Homeward trai	ler				I	EA		7,980.00	1 EA	() 7,98	0.00 …	Requisition: 303562: What's next for my		÷
	^	ITEM DETAILS 🍃												Next Step	COA Approver	
		Contract:		no value				Internal Note Justification		no value				Approvers	Drag, Amy Oliver, Susan	
		Commodity Code		25101503 / Comr (Automobile)	mercial, Military an	d Private Vehicles	& Components	Internal Atta	chments	Add				Workflow		C2 🖶
		Account Code		167900 CAPITAL EQUIPMEN	п			External Not	e	per updated q	uote provided for	additional trailer			pped steps	
								Attachments	for supplier	Add				Draft		
								PO Type Ove	rride	×				Active Margot Ma On behalf c	rtin f: Sam Shopper	



Â

í

õ

血 忠

39

հր

Change Requests • 37879	993					• • • • •	Logout 1 of 1 Results 🔻 < >	Assign To Mys
Summary PO Preview	External Communication Comments 1 Attachments	E 2 History						
Contract no value	e PO Number UDST00068	0					Pending	_
Quote number 1329							A Be aware of these issues.	
Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price		You may review and proceed.	
1 2018 HomesteaderVN#5HAE	BE2427JN066751 824AB	EA	8,495.00	2 EA	16,990.00	🗖	Total (24,970.00 USD)	`
							Shipping, Handling, and Tax charges are calculated each supplier. The values shown here are for estim	
∧ ITEM DETAILS					_	. Can't	budget checking, and workflow approvals.	lation purposes,
Contract: Commodity Code	Approvers will see the new	w line highlig	ghted.				Subtotal	24,970.0
,	(Automobile)							24,970.0
Account Code	167900 CAPITAL EQUIPMENT	External Note	no value					
		Adda a burn and a final annual train				Add		
		Attachments for supplier				Add	Related Documents	
		$\underline{\downarrow}$ EMS+Gator+Trailer+7-13-				Add	Related Documents Purchase Order: UDST000680	
			-18.pdf ×					
F This line item has been		$\underline{\downarrow}$ EMS+Gator+Trailer+7-13-					Purchase Order: UDST000680	e
<u></u>		¥ EMS+Gator+Trailer+7-13- PO Type Override	×	154	0 7 980 00		Purchase Order: UDST000680 Requisition: 3035622	e
This line item has been 2 2019 Homeward trailer		$\underline{\downarrow}$ EMS+Gator+Trailer+7-13-		1 EA	7,980.00		Purchase Order: UDST000680 Requisition: 3035622 What's next for my order? Next Step COA Approver Approvers Drag, Amy	e
<u></u>		¥ EMS+Gator+Trailer+7-13- PO Type Override	×	1 EA	7,980.00		Purchase Order: UDST000680 Requisition: 3035622 What's next for my order? Next Step COA Approver	e
2 2019 Homeward trailer		¥ EMS+Gator+Trailer+7-13- PO Type Override	×	1 EA	7,980.00		Purchase Order: UDST000680 Requisition: 3035622 What's next for my order? Next Step COA Approver Approvers Drag, Amy	e
2 2019 Homeward trailer	added		7,980.00	1 EA	7,980.00		Purchase Order: UDST000680 Requisition: 3035622 What's next for my order? Next Step COA Approver Approvers Drag, Amy Oliver, Susan	e e
2 2019 Homeward trailer	added no value 25101503 / Commercial, Military and Private Vehicles & Components	EMS+Gator+Trailer+7-13- PO Type Override EA Internal Note/Business Justification	X 7,980.00 no value Add	1 EA	_		Purchase Order: UDST000680 Requisition: 3035622 What's next for my order? Next Step COA Approver Approvers Drag, Amy Oliver, Susan Workflow	e





Changes for Non-Catalog Orders

Cancelling Lines

(first follow slides 4 through 9)



hange Requ	iests • 3395628					۲	🖶 🕘 ··· As	ssign Draft	Submit Requ
Summary F	PO Preview External Communica	tion Comments	Attachments History						
								Draft	
Changes wi	II be sent to the Supplier.						Total (7,580.00 US		
Change Requ	Jest Reason					<i>•</i> ~			7.50
Reason	Remove the service charge						Subtotal		7,58
nouoon	nomere die eernee endige								7,580
)								
General		Shipping		🔊 ··· Billing		<i>»</i> ··· <i>»</i>	Related Document	nts	
General	/	Shipping		Billing		ø v	Related Document		
	ving the steps i		9, include yc	·	quest reaso			DBT000092	
Follow	-	in slides 4-		our change ree			Purchase Order: UDI	DBT000092 084	
Follow and be	ving the steps i e sure that the	in slides 4-3 change is	being sent to ™	our change ree the supplier.	19716		Purchase Order: UDI Requisitions: 33280 What's next for my	DBT000092 084	
Follow	ving the steps i	in slides 4- change is	being sent to	our change rec	19716		Purchase Order: UDI Requisitions: 33280 What's next for my Next Step Wait t	DBT000092 084 ny order?	esponse
Follow and be	ving the steps i e sure that the	in slides 4-4 change is 162 THE GRE HULLIHEN H	being sent to EN ALL 19716	our change ree the supplier.	19716		Purchase Order: UDI Requisitions: 33280 What's next for my Next Step Wait f Approvers There	DBT000092 084 ny order? t for Validation Re	esponse ers
Follow and be	ving the steps i e sure that the Richard Requester	in slides 4-4 change is 162 THE GRE HULLIHEN HJ NEWARK, DE	being sent to EN ALL 19716	our change ree the supplier.	19716 Is		Purchase Order: UDI Requisitions: 33280 What's next for my Next Step Wait t	DBT000092 084 ny order? t for Validation Re	esponse
Follow and be Prepared by Prepared for	ving the steps i e sure that the Richard Requester Kristen Pickering	in slides 4-4 change is 162 THE GRE HULLIHEN HJ NEWARK, DE	being sent to EN ALL 19716	our change red o the supplier. Newark, DE United State Billing Optic	19716 Is		Purchase Order: UDI Requisitions: 33280 What's next for my Next Step Wait f Approvers There Workflow	DBT000092 084 ny order? t for Validation Re	esponse ers
Follow and be Prepared by Prepared for Purchasing	ving the steps i e sure that the Richard Requester Kristen Pickering UOD01	in slides 4-4 change is 162 THE GRE HULLIHEN H NEWARK, DE United States	being sent to EN ALL 19716	our change red o the supplier. Newark, DE United State Billing Optic	19716 is		Purchase Order: UDI Requisitions: 33280 What's next for my Next Step Wait to Approvers There Workflow	DBT000092 084 ay order? a for Validation Re are are no approve	esponse ers







ARE. EXCHANGE	TEST SITE									All 👻	Search (A	Altr()		396.00 USD 📜	♥ №2
hange Requ	juests • 3395628									=	۲	8 8	•••	Assign Draft	Submit Reque
Summary P	PO Preview External (Communication Co	mments Atta	chments Histo	огу										
i Changes wi	will be sent to the Supplier.											_			
Change Requ	munet Dessen									\$				Draft	
Change Requ	quest Reason									. and t	. Č	Total (7,5	80.00 US	iD)	
Reaso	croll dowr	to the I	ine Ite	ms sec	ction										7,580
_															7,580.
Acco Se	elect the (Checkbo	x next	to the	line(s) to	o canc	el								
					. ,			k Cance	مامی اد	ctad	ltor	ne	ocument	ls	
	elect the S	Selected	Line I	Item Ac	ctions m	nenu a	nd clic				lter	ns.	Order: UDE	BT000092	t
	PURC110000 R/E PROCUREMENT	PURC110000		tem Ac	ADALL ADMINISTRATIVE			k Cance	el Sele		Iter	TS. Requisition	Order: UDE ns: 332808	BT000092 84	
Work Numt Se		Selected	Line I	1 tem Ac		nenu a	nd clic				Iter	NS. Requisition What's net	Order: UDE ns: 332808 ext for my	BT000092 84 y order?	ť
Work Numt Se	PURC110000 R/E PROCUREMENT	PURC110000	Line I	tem Ac	ADALL ADMINISTRATIVE	nenu a	nd clic		no valu		Iter	TS. Requisition	Order: UDE ns: 332808 ext for my	8T000092 84 y order? t for Validation Respo	ŧ
Work Numt N/A N/A 3 Items	PURC110000 R/E PROCUREMENT	PURC110000 R/E PROCUREMENT SERVICES	Line I DPBAS DPERATING BASIC	tem Ac	ADALL ADMINISTRATIVE	nenu a	nd clic		no valu	ue	• •	NS. Requisition What's net	Order: UDE ns: 332808 ext for my Wait	BT000092 84 y order?	ŧ
Work Numt N/A 3 Items TRI-STATE	elect the S	PURC110000 R/E PROCUREMENT SERVICES	Line I DPBAS DPERATING BASIC	Atem Acc 04750 PROCUREMENT SERVICES	ADALL ADMINISTRATIVE ALLOWABLE	nenu a	nd clic	no value	no valu	ue	• •	Requisition What's net Next Step	Order: UDE ns: 332808 ext for my Wait	8T000092 84 y order? t for Validation Respo	onse
Work Numt N/A 3 Items TRI-STATE Item	elect the \$	PURC110000 R/E PROCUREMENT SERVICES	Line I DPBAS DPERATING BASIC	tem Ac	ADALL ADMINISTRATIVE	nenu a	nd clicl		no valu Ext. Price	ue	Canc	Requisition What's ner Next Step Cel Selected Workflow	Drder: UDE s: 332808 ext for my Wait d Items	8T000092 84 y order? t for Validation Respo	ŧ
Work Numt N/A 3 Items TRI-STATE Item	elect the S	PURC110000 R/E PROCUREMENT SERVICES	Line I DPBAS DPERATING BASIC	Atem Acc 04750 PROCUREMENT SERVICES	ADALL ADMINISTRATIVE ALLOWABLE	no value	nd clic	no value	no valu	ue	Canc	Requisition What's ne: Next Step Cel Selected Workflow	Drder: UDE ns: 332808 wxt for my Wait d Items Draft Active	84 y order? t for Validation Respondence re no approvers	onse
Work Numt N/A 3 Items TRI-STATE Item 1 labor to re	elect the \$	PURC110000 R/E PROCUREMENT SERVICES	Line I DPBAS DPERATING BASIC	Catalog No.	ADALL ADALL ADMINISTRATIVE ALLOWABLE Size/Packagin EA	no value	nd clic no value	Quantity 1 EA	no valu Ext. Price () 5,980.00	ue	Canc	Requisition What's net Next Step Cel Selected Workflow	Drder: UDE ext for my Wait d Items Draft Active Richard Rec	84 y order? t for Validation Respondence re no approvers	onse
Work Numt N/A 3 Items TRI-STATE Item 1 labor to re	elect the \$	PURC110000 R/E PROCUREMENT SERVICES	Line I DPBAS DPERATING BASIC	Catalog No.	ADALL ADMINISTRATIVE ALLOWABLE	no value	nd clicl no value Jnit Price	no value Quantity	no valu Ext. Price	ue	Canc	Requisition What's net Next Step Cel Selected Workflow	Drder: UDE ns: 332808 ext for my Wait d Items Draft Active Richard Rec On behalf o	BT000092 84 y order? t for Validation Respo re no approvers re no approvers	onse
Work Numt N/A N/A 3 Items TRI-STATE Item 1 labor to re 2 include up	elect the \$	PURC110000 R/E PROCUREMENT SERVICES	Line I DPBAS DPERATING BASIC	Catalog No.	ADALL ADALL ADMINISTRATIVE ALLOWABLE Size/Packagin EA	no value	nd clic no value	Quantity 1 EA	no valu Ext. Price () 5,980.00	ue	Canc	Requisition What's net Next Step Cel Selected Workflow	Drder: UDE ext for my Wait d Items Draft Active Richard Rec	BT000092 84 y order? t for Validation Respo re no approvers re no approvers	onse



hange Requests • 3395628		ncel Selected Items		>	×		= 🔹 🖷	Assign Draft	Submit Reque
Summary PO Preview External Communication Comment ① Changes will be sent to the Supplier.		cify a reason for canceling the	e line.				_		
Change Request Reason	N	egotiated cancellation of the	service charge.			<i></i>	Total (7,580.	Draft .00 USD)	
Reason Remove the service charge	954 (characters remaining		expand c	<i>lia</i> lear		Subtotal		7,580
Accounting Codes				OK Cancel		ø v			7,580
				Cance	Cost S	Dare	Related Doc	uments	
Work Order Number SpeedType Purpose Fund	Dept	Program Sour	ce Project	ID User Ref			Rurohaas and	or LIDRT00000	
Number SpeedType Purpose Fund		Program Sour ason for the			Project		Requisitions:		
Number SpeedType Purpose Fund N/A PURC110000 PURC110000 C N/A R/E PROCUREMENT R/E PROCUREMENT C					Project		Requisitions:		
Number SpeedType Purpose Fund N/A PURC110000 R/E PROCUREMENT SERVICES PURC110000 R/E PROCUREMENT SERVICES C					Project	DK.	Requisitions:	3328084 for my order?	
Number SpeedType Purpose Fund N/A PURC110000 R/E PROCUREMENT SERVICES PURC110000 R/E PROCUREMENT SERVICES C 3 Items Items Items Items Items					Project	DK.	Requisitions: What's next for Next Step	3328084 for my order? Wait for Validation Res	ponse
Number SpeedType Purpose Fund N/A PURC110000 R/E PROCUREMENT SERVICES PURC110000 R/E PROCUREMENT C 3 Items TRI-STATE CARPET INC · 3 Items · 7,580.00 USD	Enter the rea	ason for the	e cancella	ation and	Project	DK.	Requisitions: What's next 1 Next Step Approvers Workflow	3328084 for my order? Wait for Validation Res There are no approvers	ponse
Number SpeedType Purpose Fund N/A PURC110000 R/E PROCUREMENT SERVICES PURC110000 R/E PROCUREMENT SERVICES 0 0 3 Items TRI-STATE CARPET INC - 3 Items - 7,580.00 USD Item Item Item	Enter the rea	ason for the	e cancella	ation and	Project	DК.	Requisitions: What's next f Next Step Approvers Workflow	3328084 for my order? Wait for Validation Res There are no approvers	ponse



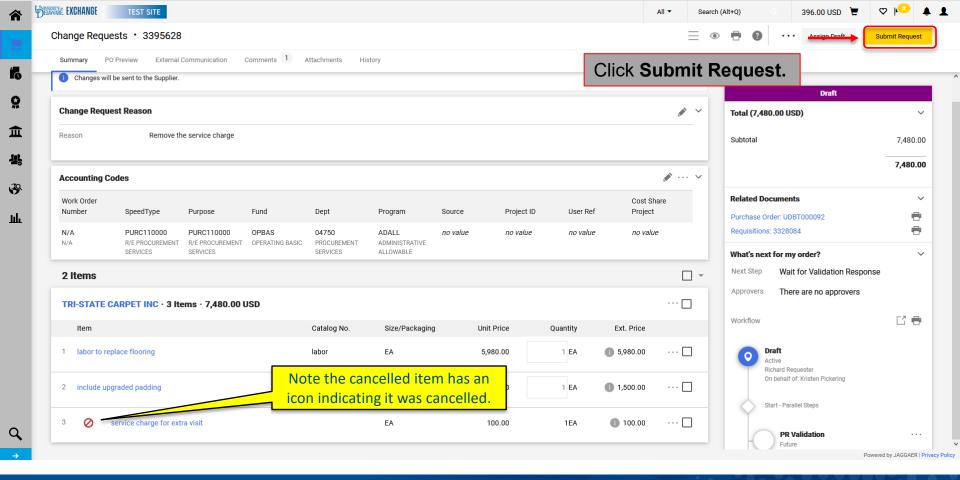
Î

3

П

0







mmary PO Preview Ex	ternal Communication Comments 1 Attachments Histo	ry					
		PO Type Override	×			Pending	
😋 include upgrade	ed padding	EA	1,500.00	1 EA	1,500.00	 Total (7,480.00 USD)	
🔨 ITEM DETAILS 🍃						 Subtotal	7,480
	no value	Internal Note/Business	no value				7,480
Contract:		Justification					
Contract: Commodity Code	30000000 / Structures, Building, Construction, Manufacturin Components & Supplies		Add			Related Documents	
	· · · · · ·	g Internal Attachments	- the cooole		on the	Related Documents Purchase Order: UDBT000092 Requisitions: 3328084	e
Commodity Code	Components & Supplies	g Internal Attachments	- the cooole		on the	Purchase Order: UDBT000092 Requisitions: 3328084 What's next?	ŧ
Commodity Code	Components & Supplies	g Internal Attachments	- the cooole		on the (100.00	 Purchase Order: UDBT000092 Requisitions: 3328084	€ €
Commodity Code Account Code	Components & Supplies	Internal Attachments	icellatio	n icon		 Purchase Order: UDBT000092 Requisitions: 3328084 What's next? Workflow Show skipped steps Submitted	ŧ
Commodity Code Account Code	Components & Supplies	Internal Attachments	icellatio	n icon		 Purchase Order: UDBT000092 Requisitions: 3328084 What's next? Workflow Show skipped steps	ŧ
Commodity Code Account Code Service charge TITEM DETAILS	Components & Supplies 161201 Approvers wil STRUCTURAL COMPONE Approvers wil relevant line. for extra visit	a Internal Attachments Cotaval Mate I see the can EA Internal Note/Business	100.00	n icon		 Purchase Order: UDBT000092 Requisitions: 3328084 What's next? Workflow Show skipped steps Submitted 1/9/2021 12:52 PM Richard Requester	ŧ
Commodity Code Account Code Service charge Account Code Contract:	Components & Supplies 161201 STRUCTURAL COMPONE Approvers will for extra visit no value 72000000 / Building, Facility Construction & Maintenance	a Internal Attachments I see the can EA Internal Note/Business Justification	100.00	n icon		 Purchase Order: UDBT000092 Requisitions: 3328084 What's next? Workflow Show skipped steps Submitted 11/9/2021 12:52 PM Richard Requester On behalf of: Kristen Pickering	ŧ



俞

ĨG

õ

血

뵳

39

ш



Changes for Non-Catalog Orders

Changing Quantities

(first follow slides 4 through 9)





Summary PO Preview External Communication	Comments Attachments History								
Changes will not be sent to the Supplier.							T-t-L (00.0)	Draft	
Change Request Reason						<i>*</i> ~	Total (28,99	50.00 05D)	28,9
Reason increase to cover invoice									28,9
Accounting Codes						<i>» »</i>	Related Do	cuments	
Accounting Codes						N4			
- Wede Order	clidos 4.0. inclu	ida vaur ak		uget ro	Sh Sh	are Project	Purchase Or Requisitions	rder: UDBT000014 s: 3395963	
Following the steps in and be sure that the c			•		ason	are Project	Requisitions		ponse
Following the steps in			•		ason	are Project	Requisitions What's next	:: 3395963 t for my order?	
Following the steps in and be sure that the c	hange is being s		•		ason	are Project	Requisitions What's next Next Step	: 3395963 t for my order? Wait for Validation Res	
Following the steps in and be sure that the c	hange is being s		•		ason	are Project	Requisitions What's next Next Step Approvers Workflow	: 3395963 t for my order? Wait for Validation Res There are no approvers	
Following the steps in and be sure that the c 5,000 Items TECHNICAL FIBRE PRODUCTS INC - 5,000 Ite	ms · 28,950.00 USD	sent to the	supplier (i	if need	ed).	are Project	Requisitions What's next Next Step Approvers Workflow	: 3395963 t for my order? Wait for Validation Res There are no approvers	
Following the steps in and be sure that the c 5,000 Items TECHNICAL FIBRE PRODUCTS INC - 5,000 Ite Item	ms · 28,950.00 USD	sent to the	Unit Price	if neede	ed).	are Project	Requisitions What's next Next Step Approvers Workflow	: 3395963 t for my order? Wait for Validation Res There are no approvers There are no approvers	

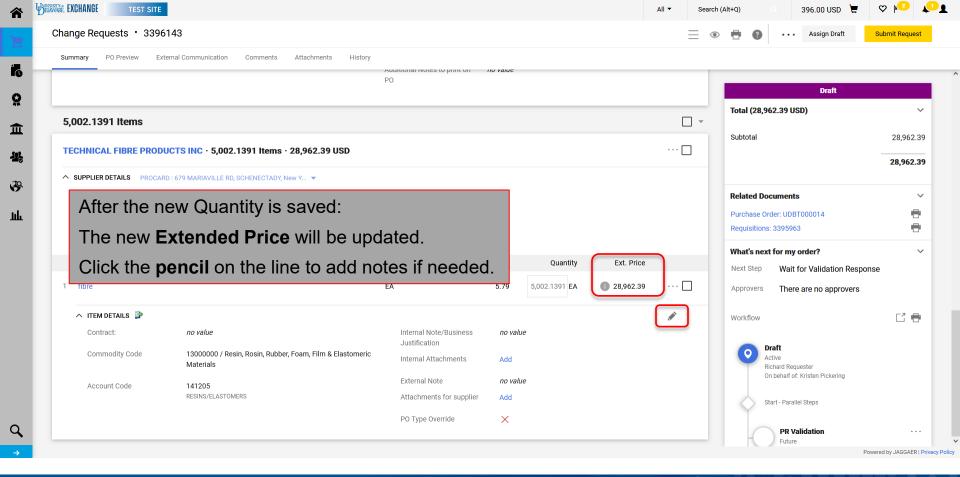


Summary PO Preview External Communi	ation Comments Attachments History	J							
() Changes will not be sent to the Supplier.								Draft	
Change Request Reason						× ×	Total (28,962.39 Subtotal) USD)	28,96
Reason increase to cover in	oice					_			28,96
	e item you wish to c pe in the new quan	-	k in the C	Quantity	box	oject	Purchase Order: UI Requisitions: 3395 What's next for m	5963	
N/A PURC17	you move out of th	e box it will	automat	ically be	e saved.		Next Step Wa	ait for Validation Respo nere are no approvers	nse
N/A PURC17 N/A R/E CONT MANAGEP When		e box it will	automat	ically be	e saved.	··· □	Next Step Wa	ait for Validation Respo	nse
N/A PURC17 N/A R/E CONT MANAGEN 5,002.1391 Items		e box it will	unit Price	cally be	e saved.		Next Step Wa	ait for Validation Respo	





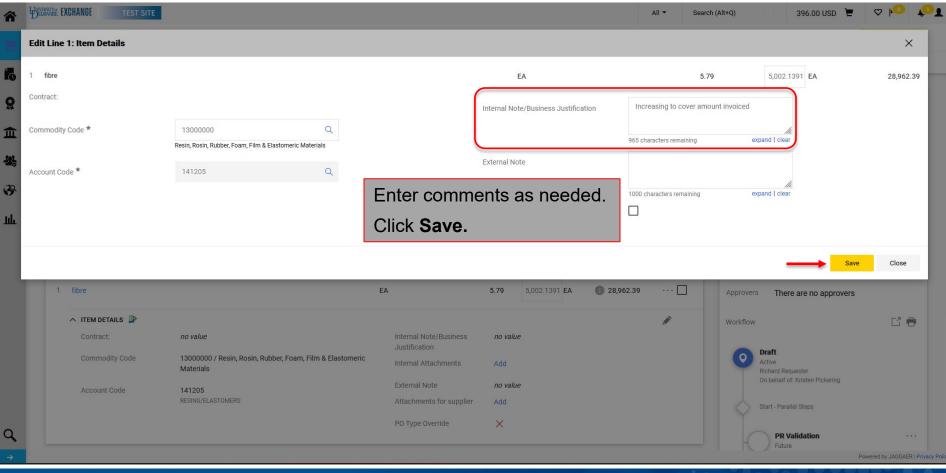














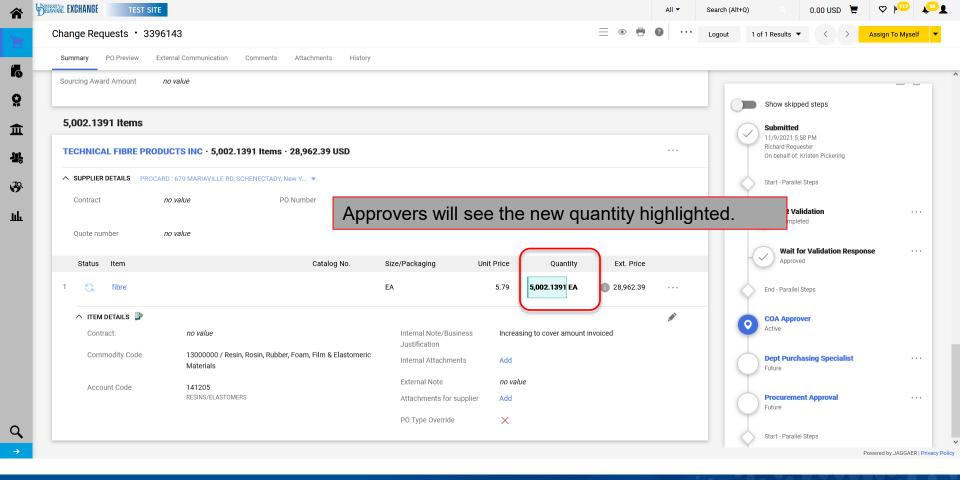


Summary PO P	Preview Extern	nal Communication Comments Attachments 1	History	Click S	ubmit Req	uest.	
∧ ITEM DETA	AILS 🍺		-		/		
Contract:	T	no value	Internal Note/Business Justification	no value		Draft Total (2,502.17 USD)	
Commodit	ty Code 4	47000000 / Cleaning Equipment & Supplies	Internal Attachments	Add		lotal (2,502.17 050)	
Account C		141219 CLEANING AND JANITORIAL SUPPLI	External Note	no value		Subtotal	2,502.
	-	LEARING AND GARLIONIAL OUT D	Attachments for supplier	Add			2,502.
			PO Type Override	×		Related Documents	
						Purchase Order: UDST001016	6
5 Stripper		EA	A 250.0	00 2 EA 🚺 500.0	.00 🗌	Requisitions: 3307835	e
	AILS 🍺					What's next for my order?	
Contract:	r	no value	Internal Note/Business Justification	no value		Next Step Wait for Validation Re	
Commodit	ty Code 4	47000000 / Cleaning Equipment & Supplies	Internal Attachments	Add		Approvers There are no approve	ſS
Account C		141219 CLEANING & JANITORIAL SUPPLIES	External Note	The quantity has been increased to	o two	Workflow	C3 🖷
			Attachments for supplier	Add		O Draft Active	
			PO Type Override	X		Requester Sean On behalf of: Kristen Pickering	













Changes for Non-Catalog Orders

Changing Prices

(first follow slides 4 through 9)





mange Requests	3396195					:	•	8 0	Assign Draft	Submit Requ
Summary PO Preview	External Communication Com	nments Attachments Hi	istory				_			
Changes will be sent to	o the Supplier								Draft	
• ondriges will be sent to								Total (7,480	D.00 USD)	
Change Request Reas	son						~ ~	Quite to a		7.40
Reason	Increase amount for labor to comp	plete job faster						Subtotal		7,480
Nous off	morease amount for labor to comp									7,480
0	<i>i</i> ····	Ohinging		<i>▶</i> · · · Bi		<i>.</i>		Related Doo	oumonto.	
General		Shipping		BI	illing		_		der: UDBT000092	
Cart Name	T 1							Fulcilase Of	uel. 0001000092	
	Test Amount Only 7 - CR(3)					-		Requisitions	: 3328084	1
Following	g the steps in s ure that the ch	lides 4-9, in ange is bein		[·] change he supp	e request reas				t for my order? Wait for Validation Resp There are no approvers	
Following and be su	g the steps in s ure that the ch	lides 4-9, in ange is bein		[·] change he supp	e request reaso blier (if needed			What's next	t for my order? Wait for Validation Resp	onse
Following and be su	g the steps in s ure that the ch Richard Requester Kristen Pickering	lides 4-9, in ange is bein HULLIHEN HALL NEWARK, DE 19716		່ change he supp ຫ	e request reaso blier (if needed			What's next	t for my order? Wait for Validation Resp	onse
Following and be su Prepared by Prepared for	g the steps in s ure that the ch Richard Requester Kristen Pickering	lides 4-9, in ange is bein HULLIHEN HALL NEWARK, DE 19716		^r change he supp ຫ	e request reaso plier (if needed nited States			What's next Next Step Approvers Workflow	t for my order? Wait for Validation Resp	onse
Following and be su Prepared by Prepared for	y the steps in s ure that the ch Richard Requester Kristen Pickering UODO1 UNIVERSITY OF DELAWARE	Hides 4-9, in ange is bein HULLIHEN HALL NEWARK, DE 19716 United States		^r change he supp ຫ	e request reaso blier (if needed hited States lling Options			What's next Next Step Approvers Workflow	t for my order? Wait for Validation Resp There are no approvers	onse
Following and be su Prepared by Prepared for Purchasing Business Unit	y the steps in s ure that the ch Richard Requester Kristen Pickering UODO1 UNIVERSITY OF DELAWARE	Hides 4-9, in ange is bein HULLIHEN HALL NEWARK, DE 19716 United States Delivery Options	g sent to t	^r change he supp ຫ	e request reaso blier (if needed hited States lling Options			What's next Next Step Approvers Workflow Workflow	t for my order? Wait for Validation Resp There are no approvers There are no approvers the chare Requester n behalf of: Kristen Pickering	onse
Following and be su Prepared by Prepared for Purchasing Business Unit eBuilder Process Instance	y the steps in s ure that the ch Richard Requester Kristen Pickering UNIVERSITY OF DELAWARE no value	Hides 4-9, in ange is bein HULLIHEN HALL NEWARK, DE 19716 United States Delivery Options Expedite	g sent to t	^r change he supp ຫ	e request reaso blier (if needed hited States lling Options			What's next Next Step Approvers Workflow Workflow	t for my order? Wait for Validation Resp There are no approvers There are no approvers	onse

Powered by JAGGAER | Privacy Policy





â	DERXIE EXCHANGE TEST SITE	All 👻 Sear	rch (Alt+Q) 396.00 USD 📜	♡⊮₂ ⊾¹₽
2	Change Requests • 3396195	\equiv	💿 🖶 🕘 Assign Draft	Submit Request
1 7	Summary PO Preview External Communication Comments Attachments History			
NU O	TRI-STATE CARPET INC · 3 Items · 7,480.00 USD	… 🗆	Draft	^
	∧ SUPPLIER DETAILS		Total (7,480.00 USD)	~
	Contract no value PO Number UDBT000092		Subtotal	7,480.00
-12 2	Scroll down to the Line Items section and click on			7,480.00

5,980.00

no value

no value

no value

Add

Add

Х

1.500.00

EA

ΕA

Internal Note/Business

Internal Attachments

Attachments for supplier

Internal Note/Business

Justification

External Note

PO Type Override

labor

Powered by	JAGGAER	Privacy F	olicy

 \sim

8

e.

 \sim

C7 🖶

Related Documents

Requisitions: 3328084 What's next for my order?

Next Step

Approvers

Workflow

Purchase Order: UDBT000092

O Draft

Active Richard Requester On behalf of: Kristen Pickering

Start - Parallel Steps

Future

PR Validation

Wait for Validation Response

There are no approvers

Ext. Price

6 5,980.00

1,500.00

··· □

··· 🗆

Quantity

1 EA

1 EA

labor to replace flooring

∧ ITEM DETAILS

Commodity Code

Account Code

2 include upgraded padding

∧ ITEM DETAILS <a>Details

Contract:

Contract:

the blue item name link to make changes.

BUILDING AND FACILITY CONSTRUC

72000000 / Building, Facility Construction & Maintenance

no value

Services

151207

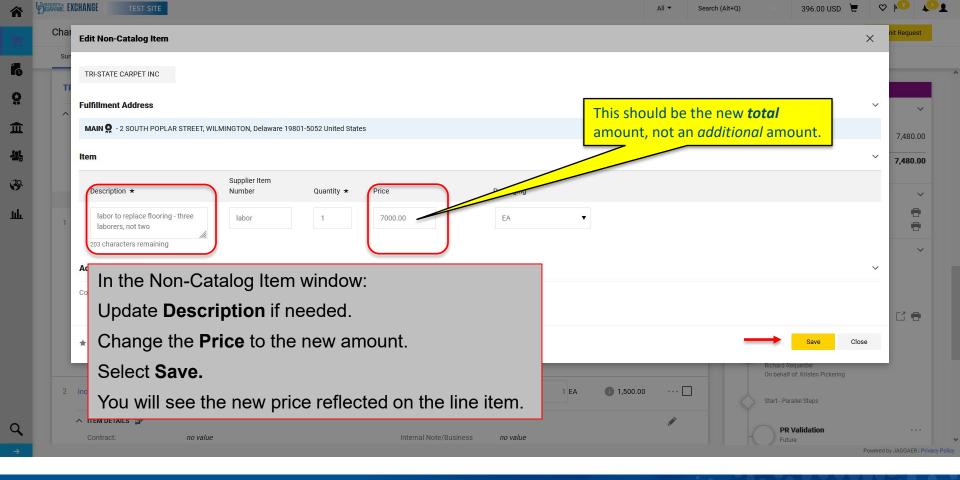
no value

39

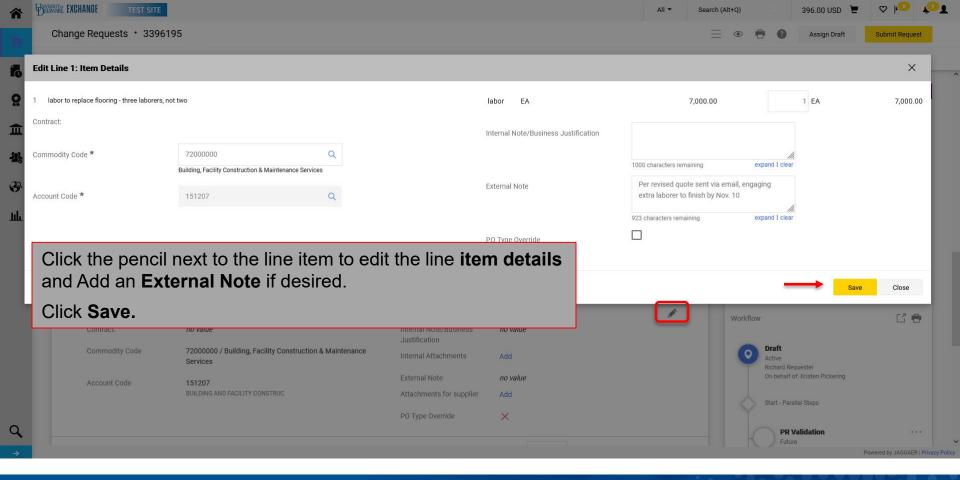
ш

Q

32









Change Requests • 3396	5195							<u> </u>	• •	Aseign Dreft	Subr
Summary PO Preview Ex	ternal Communication Comments	Attachments History									_
			PO								
										Draft	
2 Items								Total (8,5	00.00 USD)		
							_	Subtotal			8,5
TRI-STATE CARPET INC	· 3 Items · 8,500.00 USD						…				8,5
											8,0
									nts		
Select Add	next to Attachn	nents for	supplier to a	attach a	anv nec	essarv	docur	nent(s).		0092	
	next to Attachn	nents for	supplier to a	attach a	any nec	essary	docur	ment(s).		0092	
Select Add Click Subm		nents for	supplier to a	attach a	any nec	essary	docur	nent(s).)BT000 084		
			supplier to a	onit Price		EXT. Price	docur	nent(s).)BT000 084 iy ord e	er?	ISE
Click Subm	it Request.						docur	. ,)BT000)84 iy ord (Wait for V		ise
Click Subm	it Request.	Catalog No.	Size/Packaging		Quantity	Ext. Price		Next Step Approvers)BT000)84 iy ord (Wait for V	l er? Validation Respon	
Click Subm rem 1 labor to replace flooring - 1	it Request.	Catalog No.	Size/Packaging	0nit Price 7,000.00	Quantity	Ext. Price	🗆	Next Step Approvers Workflow	BT000 084 Wait for V	l er? Validation Respon	
Click Subm Item I labor to replace flooring - 1 TIEM DETAILS	it Request.	Catalog No. labor	SIZE/Packaging EA Internal Note/Business	0nit Price 7,000.00	Quantity	Ext. Price	🗆	Next Step Approvers Workflow)BT000)84 iy ord (Wait for V	ler? Validation Respon e no approvers	
Click Subm Item I labor to replace flooring - 1 ITEM DETAILS Contract:	it Request. three laborers, not two no value 72000000 / Building, Facility Cons	Catalog No. labor	Size/Packaging EA Internal Note/Business Justification	0nit Price 7,000.00 no value Add	Quantity 1 EA	Ext. Price	••• 🗆	Next Step Approvers Workflow	Date Date Date Draft Active	ler? Validation Respon e no approvers	
Click Subm Item I labor to replace flooring - 1 Contract: Commodity Code	it Request. three laborers, not two <i>no value</i> 72000000 / Building, Facility Cons Services 151207	Catalog No. labor	SIZE/Packaging EA Internal Note/Business Justification Internal Attachments	0nit Price 7,000.00 no value Add Per revised finish by No	Quantity 1 EA	Ext. Price	••• 🗆	Next Step Approvers Workflow	DBT000 D84 Wait for N There are Draft Active Richard Requeste	ler? Validation Respon e no approvers er sten Pickering	ise





â	EXCHANGE TEST SITE	All 🔻	Search (Alt+Q)	0.00 USD 崔	♥┝ᡃण
	Change Requests • 3396195		= • 🖶 (2 Logout	Assign To Myself 🔻
	Summary P0 Preview External Communication Comments Attachments History				

∧ SUPPLIER DETAILS							Pending	
Contract /	o value PO Number	UDBT000092					Total (8,500.00 USD)	
Quote number /	o value	will see the new	<i>w</i> amount	highlig	nted.		Subtotal	8,500
Status Item	Cata	log No. Size/Packaging	Unit Price	Quantity	Ext. Price			8,500
1 😋 labor to replace f	looring - three laborers, not two labo	r EA	7,000.00	1 EA	7,000.00		Related Documents	
∧ ITEM DETAILS				·		*	Purchase Order: UDBT000092 Requisitions: 3328084	6
Contract:	no value	Internal Note/Bu Justification	usiness no value				What's next?	
Commodity Code	72000000 / Building, Facility Construction & Services		nents Add				Workflow	
Account Code	151207 BUILDING AND FACILITY CONSTRUC	External Note	Per revise finish by		aail, engaging extra lab	oorer to	Show skipped steps	
		Attachments for	r supplier Add				Submitted 11/9/2021 6:11 PM	
		PO Type Overrid	e ×				Richard Requester On behalf of: Kristen Pickering	
2 😋 include upgraded	padding	EA	1,500.00	1 EA	1,500.00	•••	Start - Parallel Steps	
∧ ITEM DETAILS							PR Validation Completed	
Contract:	no value	Internal Note/Bu	usiness no value					



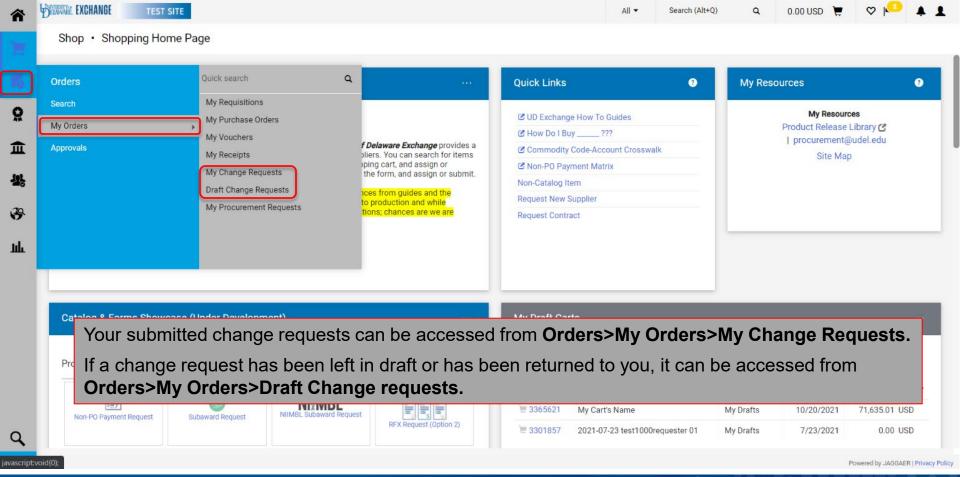
Monitoring Your Change Requests

- The Requester will be able to see the Change Request status in the Change Request tab of the Purchase Order (illustrated in the next slide).
- A revised PO will be generated after going through the workflow for approval.



NIVERSITY EXCHANGE TEST SITE				All ▼ Search (Alt+Q) Q 396.00 USD 💆	♥ 🔁 🛔
Purchase Order • UDBT0	0092 Revision				Ξ
Status Summary Revision	4 Confirmations Shipments	Change Requests 1 Receipts Vouchers 2	Comments 1 Attachments History		
Records found: 4				Completed	
Records round. 4				Details	
Status	Number	Owner	Created	Supplier Status	
Completed	3395355	Richard Requester	11/9/2021	Sent To Supplier	
Completed	9905519	Dishard Doguseter	11/0/2021	one of more lines rejected	
Completed	3395513	Richard Requester	11/9/2021	Supplier	
Completed	3395628	Richard Requester	11/9/2021	TRI-STATE CARPET INC	
Pending	3396195	Richard Requester	11/9/2021	Total (11,380.00 USD)	
				Subtotal	11,380.
The Change	Requests tab o	f the PO lists all char	nge requests.		11,380.
The Cteture e	f tha Change D			Related Documents	
The Status of	i the Change R	equest is updated as	it moves through work	Requisitions: 3328084	
				Change Requests: 3396195	
				Change Requests: 3395628	ŧ
				Change Requests: 3395513	ŧ
				Change Requests: 3395355	ŧ
				Vouchers: IT000764	
				Vouchers: IT000798	ť
				What's next?	
				Workflow Status	 Complete
					 oompiett





ELAWARE.





Shop • Shopping Home Page						
Organization Message	Quick Links	0	My Resourc	ces		
Welcome to the University of Delaware Exchange Test Site!	C UD Exchange How To Guide	S		My Resources		
	C How Do I Buy ???	Product Release Library 🕑 procurement@ud				
Here you'll find the goods and services you need. The greatly expanded <i>University of Delaware Exchange</i> provides a familiar online shopping experience and negotiated pricing from UD's preferred suppliers. You can search for items by keyword or item number.	amiliar online em number. Commodity Code-Account Crosswalk Site Map					
When you find the item you need, just put it in your shopping cart, and assign or submit. If you can't find what you need, click on the Non-Catalog Item link, complete the form, and assign or submit.	Non-PO Payment Matrix					
	Non-Catalog Item					
Please note: As you use this site for training and testing, you may see small differences from guides and the production site. This is where the administrators test new solutions before moving to production and while building new guides. Please email procurement/guide/adu If you have specific questions; chances are we are working on it!	Request New Supplier					
		(())	1	"^_"		
Change requests returned to you can also be view	led in your Dra	in Carts mari	ked with	a "CR"		

Catalog & Forms Showcase	e (Under Development)				My Draft Ca	rts			
Procurement Forms				~	Draft Cart Type	All Drafts 🗸			
		1			Number 🗢	Cart ▽	Cart Type 🗢	Date 💌	Total 🗢
Non-PO Payment Request	Subaward Request	NIMBL Subaward Request			📜 3328465	Optimus Prime Project - CR	My Drafts	8/29/2021	37,000.00 USD
Non't o'r dyment Request	ouburraid request		RFX Request (Option 2)		📜 3328463	APTIM SUBWARD	My Returned Requisitions	8/29/2021	200.00 USD
					3328462	Performance Space UDX	My Drafts	8/29/2021	500.00 USD
					🗑 3328453	2021-08-28	My Drafts	8/28/2021	2,852.00 USD
Waiver of Bid Request					3328425	2021-08-27 twood 01	My Drafts	8/27/2021	40,000.00 USD
					· · · · ·	D (0 15-414D			C D D

Powered by JAGGAER | Privacy Policy



Changes for Catalog Orders

If a change needs to be made to a catalog PO, **please contact the supplier directly!** UDX Catalog orders are submitted electronically directly into the supplier's eCommerce system for fulfillment, **BUT** UDX change requests are sent via email and may not be reviewed by the supplier until **AFTER** the order is completely fulfilled!

- If replacements or additional items are needed, please create a new order.
- Contacting the supplier is best to cancel a line or update a minor detail on shipping address (e.g., room number).
- Suppliers may not be able to make all changes.
- **Comments** can be added to POs for internal documentation and tracking.

This process is the same for any user role: Shopper, Requester, or DPS



Â	EXCHANGE TEST SITE		All 🔻	Search (Alt+Q)	71,635.01 USD	≝ ♥ № ♠ ₤
	Purchase Order • UDB0000060 Revision 0					≡ ⊕ Ø
њ 16	Status Summary Revisions 1 Confirmations	Shipments Change Requests Receipts Vouchers	Attachments	1 History		
8	Records found: 1	Show comments for All		•	Comp	verted
Î	Requester Sean - 10/20/2021 1:29:35 PM	Purchase Order - UDB0000	0060 Commen	t Added	Supplier Status Sent To Supplier	
¥;	test				Supplier W B MASON CO INC	
Ш		To add a comment to a PO:			Total (71,635.01 USD) Subtotal	71,635.01
		Click the Comments tab.				71,635.01
		Click on '+' sign.			Related Documents	~
					Requisitions: 3181392	
					What's next?	
					Workflow Status	 Completed
~					Workflow	C 🖶
Q, →					Submitted	Powered by JAGGAER Privacy Policy
	ELAWARE.	42				

ñ	EXCHANGE TEST SITE		All 🔻	Search (Alt+Q)	71,635.01 USD 📜	♡ 💫 🔺 👤
1	Pure Manually add "Procurement Help" as recipient by entering "Help" in the la name field of the user search box. O	st	Attachments	1 History		≡ 8 0
♀ 血 場	contact Procurement Help if you req administrative action regarding this f such as a closure or line cancellation Attach the confirmation you received from the supplier after contacting th	PO, Show comments for All		• +	Complete Details Supplier Status Sent To Supplier	ed ~
3 9- Ш	Enter your comment here detailing what you are changing 245 characters remaining expand clear	Email notification(s) Add recipient Kristen Pickering (Prepared by) <kpick@udel.edu> Requester Sean (Prepared for) <ud-mart@udel.edu> Attach file (optional) Attachment Type File Name</ud-mart@udel.edu></kpick@udel.edu>	Select t Add Re Type yc Attach	-	ents by checki /ith the link, if i ent cessary	Ŭ
Q •	Requester Sean - 10/20/2021 1:29:35 PM test	Purchase Order - UDB0000	Comment /	Added	Workflow Status Workflow Submitted	Completed C Powered by JAGGAER Privacy Policy
	ELAWARE.	43				

Status Summary Revisions 1 Confi	rmations Shipments Change Requests Re	eceipts Vouchers Comments 2	Attachments 1	History		
			1	<i>.</i>		
Records found: 2		Show comments for All	•		Complete	ed
Records found: 2		Show comments for All			ils	
					lier Status	
Requester Sean - 10/20/2021 3:16:14 PM		Purchase Order - UDB000	0060 Comment Added	う Sent	To Supplier	
Contacted supplier to remove a line item from	the order.			Supp		
Email sent: Requester Sean <ud-mart@udel.edu></ud-mart@udel.edu>				WB	MASON CO INC	
Requester Sean - 10/20/2021 1:29:35 PM		Purchase Order - UDB000	0060 Comment Added	5 Total	(71,635.01 USD)	
test				Subto	otal	71,
						71,0
				_		
	Fo view comments in a	a PO:		Relat	ted Documents	
	Select the Comments ta	ab.		Requ	isitions: 3181392	
				What	t's next?	
	Comments are listed ne	west to oldest.		Work	flow Status	• Com
				Work	flow	Ľ
				Work	liow	
				1	Submitted	





Questions:

• procurement@udel.edu

Resources:

- Procurement Services Website
- Understanding Access in UD Exchange
- <u>Completing the Access Request Form</u>
- Advanced Change Requests
- <u>Closing and Cancelling POs</u>
- <u>Finding Suppliers and Supplier Information in UD Exchange</u>

