

North Carolina A&T University Change Request Documentation

A **Change Request** is a request to modify a purchase order (PO) in AggieMart.

***Notes:**

1. The request is no longer a form, but a selectable tab directly on the PO.
2. POs that have been invoiced CANNOT be modified.
3. Change Requests are subject to go through a workflow for approval.

What changes CAN be made directly in AggieMart with the new change request functionality?

- Quantity increase or decrease
- Unit price increase or decrease
- Line description
- FOAP (fund, account) at the header and at the line
- Add non-catalog item to order

What changes CANNOT be modified directly in AggieMart through the new change request?

***Note:**

- In AggieMart, “modified directly” means the change has updated in Banner, as well.
1. Close/Open a PO
 2. Cancel/Uncancel a line on a PO
 3. Changing “Quantity PO” to “Cost PO”

***Note:**

- Although these request items cannot be modified directly in AggieMart, Procurement Services can still modify them manually.

What will cause errors that Procurement Services CANNOT resolve?

- When changing a fund, the end user will need to have access to both the current fund and the new fund or the PO will error out.
- If the end user who originally submitted the PO is no longer with the University and a change request is submitted, the PO will error out.

***Note:**

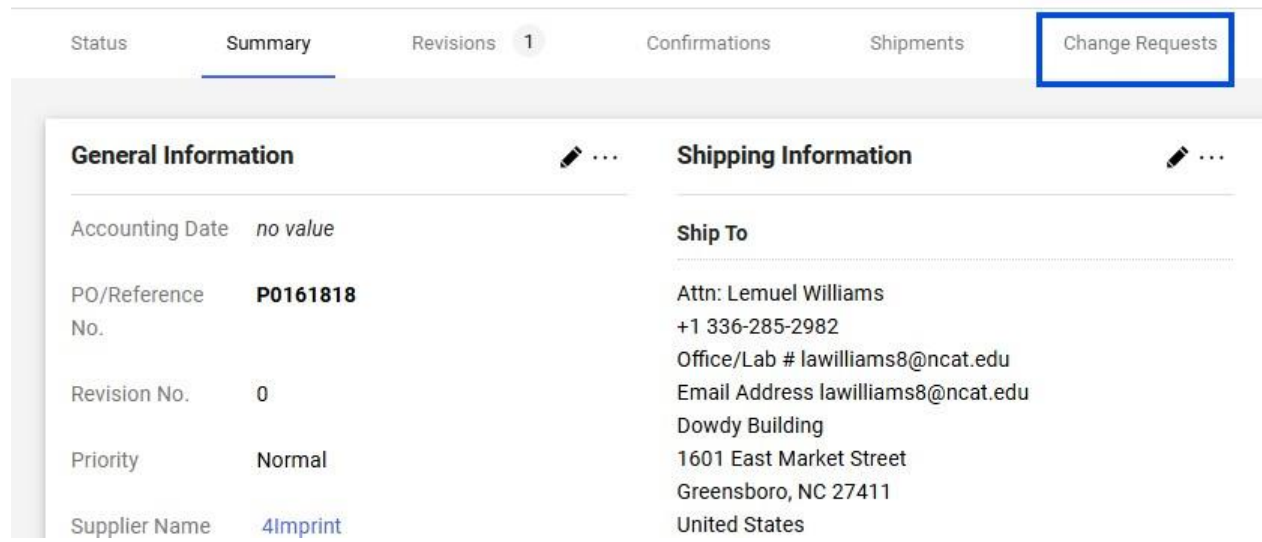
- If a PO errors out in this manner, it will need to be cancelled and redone.

How to access the new Change Request Functionality

To access Change Request functionality:

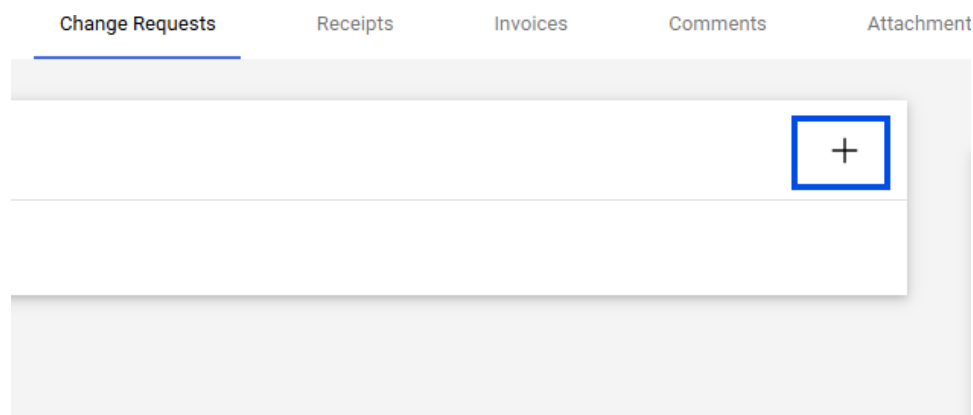
1. Navigate to the PO needing modification.
2. Locate the *Change Requests* tab and select it.

Purchase Order • [4Imprint](#) • P0161818 Revision 0



The screenshot shows the top navigation bar of a purchase order system. The tabs are: Status, Summary, Revisions (with a '1' indicator), Confirmations, Shipments, and Change Requests. The 'Change Requests' tab is highlighted with a blue border. Below the navigation bar, there are two main sections: 'General Information' and 'Shipping Information', each with a pencil icon and three dots indicating edit options. The 'General Information' section includes fields for Accounting Date (no value), PO/Reference No. (P0161818), Revision No. (0), Priority (Normal), and Supplier Name (4Imprint). The 'Shipping Information' section includes a 'Ship To' section with contact details for Lemuel Williams, including phone number, email address, and address.

3. Once in the *Change Request* tab, select the “+” symbol.



The screenshot shows the 'Change Requests' tab selected in the navigation bar. Below the navigation bar, there is a large white box with a blue border containing a plus sign (+) in the center, indicating where to click to add a new change request.

End users can send an email notification to appropriate end users in AggieMart by checking the box next to their name. Multiple end users can be selected to notify.

***Note:**

- End users are required to add the reason for the request in the *Create Change Request* box.

End users are encouraged to be thorough and direct with their request without adding unnecessary fluff to the reason for the change.

Create Change Request ✕

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](#)

Lemuel Williams (Prepared by, Prepared for) <lawilliams8@ncat.edu>

Stephen Pass (Approved Requisition) <swpass@ncat.edu>

User with change request permission:

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LaShawnda Miles (Approved) <lmiles@ncat.edu>

Willa Vance (Approved) <wsvance@ncat.edu>

Zachary Merrill (Approved) <zmerrill@ncat.edu>

[add email recipient...](#)

Change Request Reason

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

Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.

[Create Change Request](#) [Close](#)

End users can upload attachments to the Change Request if necessary.

Attach file to this change request (optional):

Attachment Type File Link/URL

File Name

File

[Create Change Request](#) [Close](#)

Quantity increase or decrease:

To modify line item quantity, navigate to line item and replace current number to the correct quantity.

Before change:

4Imprint · 5 Items · 89.95 USD

^ SUPPLIER DETAILS PO Purchase Order 1 : PO Box 320, 101 Commerce ...			
Contract	no value	PO Number	P0161819
Account Code	no value	Pricing Code	no value
Quote number	no value	PO Clauses	

Line	Item	Catalog No.	Size/Packaging	Unit Price	Quantity
1	Change_Test1	Test 1	EA	17.99	<input type="text" value="5"/> EA

^ ITEM DETAILS 			
Contract:	no value	Internal Note	no value

Summary



Draft

Total (89.95 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	89.95
Shipping	0.00
	<hr/>
	89.95

After change:


New line item quantity will be highlighted in green to show change made.

Subtotal will highlight reflecting the corresponding quantity change in the *Summary* of the workflow.

4Imprint · 8 Items · 143.92 USD

^ SUPPLIER DETAILS PO Purchase Order 1 : PO Box 320, 101 Commerce ...					
Contract	no value	PO Number	P0161819		
Account Code	no value	Pricing Code	no value		
Quote number	no value	PO Clauses			

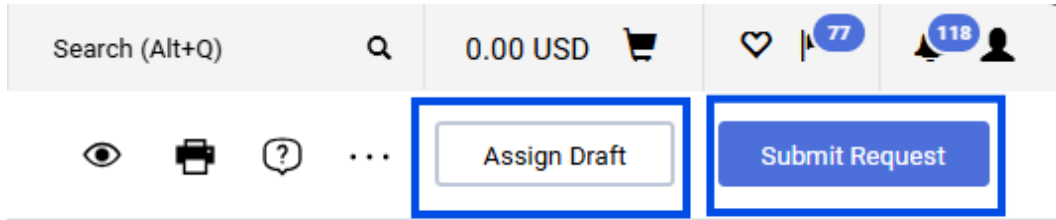
Line	Item	Catalog No.	Size/Packaging	Unit Price	Quantity
1	Change_Test1	Test 1	EA	17.99	8 EA

^ ITEM DETAILS 	
--	--

Subtotal will highlight reflecting the corresponding quantity change in the *Summary* of the workflow.

Summary →	
Draft	
Total (104.95 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	104.95
Shipping	0.00
	104.95

The end user will then assign draft or submit request.



Unit price increase or decrease:

To modify unit price, the end user will select line item that needs to be changed.

4Imprint · 5 Items · 89.95 USD

^ SUPPLIER DETAILS PO Purchase Order 1 : PO Box 320, 101 Commerce ...			
Contract	no value	PO Number	P016
Account Code	no value	Pricing Code	no va
Quote number	no value	PO Clauses	

Line	Item	Catalog No.
1	Change_Test2	Test 1

A familiar window will appear that allows the end user to make changes.

Under *Unit Price*, enter new price.


Before change:

4Imprint · 5 Items · 89.95 USD

^ **SUPPLIER DETAILS** [PO Purchase Order 1 : PO Box 320, 101 Commerce ...](#)

Contract	no value	PO Number	P0161818
Account Code	no value	Pricing Code	no value
Quote number	no value	PO Clauses	

Line	Item	Catalog No.	Size/Packaging	Unit Price	Quantity
1	Change_Test2	Test 1	EA	17.99	5 EA

^ **ITEM DETAILS** 

Contract:	no value	Internal Note	no value
Commodity Code	53100000 / Clothing	Internal Attachments	Add

After change:


Unit price will now be highlighted in green to signify change.

4Imprint · 5 Items · 104.95 USD

^ **SUPPLIER DETAILS** [PO Purchase Order 1 : PO Box 320, 101 Commerce ...](#)

Contract	no value	PO Number	P0161818
Account Code	no value	Pricing Code	no value
Quote number	no value	PO Clauses	

Line	Item	Catalog No.	Size/Packaging	Unit Price
1	Change_Test2	Test 1	EA	20.99

^ **ITEM DETAILS** 

Contract:	no value	Internal Note	no va
Commodity Code	53100000 / Clothing	Internal Attachments	Add

The subtotal will also update in the *Summary* of the Change Request.

The end user can then assign draft or submit the request.

Line description:

To modify line item description, navigate to line item that needs change.

4Imprint · 5 Items · 89.95 USD

^ SUPPLIER DETAILS PO Purchase Order 1 : PO Box 320, 101 Commerce ...

Contract	no value	PO Number	P0161817
Account Code	no value	Pricing Code	no value
Quote number	no value	PO Clauses	

Line	Item	Catalog No.	Size/Packaging
1	Change_Test3	Test 3	EA

^ ITEM DETAILS

Contract:	no value	Internal Note
Commodity Code	53100000 / Clothing	Internal Attachments

A familiar window will appear.

The end user can then change the description to the correct name.

Before change:

Item

Product Description ★	Catalog No. ★	Quantity ★	Price Estimate
Change_Test3 242 characters remaining	Test 3	5	17.99

Additional Details

Commodity Code	<input type="text" value="53100000"/> 	Manufacturer Name
	Clothing	


After change:

4Imprint · 5 Items · 89.95 USD

Line	Item	Catalog No.	Size/Packaging
1	Change_Test	Test 3	EA

^ SUPPLIER DETAILS PO Purchase Order 1 : PO Box 320, 101 Commerce ...

Contract	no value	PO Number	P0161817
Account Code	no value	Pricing Code	no value
Quote number	no value	PO Clauses	

^ ITEM DETAILS 

Contract:	no value	Internal Note
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The line item description will now be highlighted in green to signify change.
The subtotal will not be modified from this change.

The end user can then assign draft or submit request.

FOAP (Fund, Account):

To modify index or account, navigate to *Accounting Codes* section of PO.

Accounting Codes  ...									
Chart	Index	Fund	Account	Organization	Program	Activity	Location	Bank Code	Tax Group Code
T	170016 Procurement Services	170016 Procurement Services	75101 \$100-2499 Per Item	43013 Procurement Services	170 Institutional Support	no value	no value	05 05	no value

Select the pencil icon and a new window will appear that allows changes for index and or account.

Bank Code	Tax Group Code
05 05	no value

Edit Accounting Codes

Accounting Codes

Chart *	Index *	Fund *	Account *	Organization *	Program *	Activity	Location
T	170016	170016	75101	43013	170		

* Required fields

Save Close

To modify index, the end user will change index to needed fund number, search for value, or search for a description of the needed fund.

Edit Accounting Codes

Accounting Codes

Chart ★	Index ★	Fund
T	170016	17

Edit Accounting Codes

Accounting Codes

Chart ★	Index ★	Fund
T	170016	17

Search Index

Custom Field Search

Value Description Filter Clear All Filters

Page 1 of 6 1-20 of 117 Results 20 Per Page

Value ↑	Description
101002	Agriculture Education

Once the correct fund is found, the end user can change the current information by selecting the “+” mark.

101051	Secondary Education	+
101054	Education Leadership & Policy	+
101055	Educational Partnership	+
101056	Educational Media	+
101059	Teacher Education	+
101066	Education & Admin Suppprt	+

Before change:

Accounting Codes

Chart ★ 	Index ★
<input type="text" value="T"/>	<input type="text" value="170016"/>

After change:

Accounting Codes

Index	Account	Activity	Chart
101056 Educational Media	75101 \$100-2499 Per Item	no value	T

To modify the account, follow the same steps as for changing the index, but do so in the account code field.

Index or account will now be highlighted in green to signify change.

The end user can then assign draft or submit request.

Add non-catalog item:

To add non-catalog item to a PO, navigate to line item(s) section and select *Supplier Actions for (Insert Supplier Name Here)*, denoted by three dots.

This option is located to the right of the vendor's name, line item count, and subtotal.

7 Items

Apple Spice Junction · 7 Items · 146.93 USD

^ SUPPLIER DETAILS AP Accounts Payable 1 : 104 Meadowood Street, S...

Contract	no value	PO Number	P0161815
Account Code	no value	Pricing Code	no value
Quote number	no value	PO Clauses	

Select option *Add Non-Catalog Item*

7 Items

Apple Spice Junction · 7 Items · 146.93 USD

^ SUPPLIER DETAILS AP Accounts Payable 1 : 104 Meadowood Street, S...

Contract	no value	PO Number	P0161815
Account Code	no value	Pricing Code	no value
Quote number	no value	PO Clauses	

Line	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
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The *Add Non-Catalog Item* window will appear, allowing the new non-catalog item to be added to the PO.

End user will enter the necessary information and select *Save* to have item added or *Save And Add Another* to add multiple items to the PO.

Add Non-Catalog Item

Apple Spice Junction

Fulfillment Address

AP Accounts Payable 1 104 Meadowood Street, Ste A, Greensboro, North Carolina 27409 United States

Item

Product Description	Catalog No.	Quantity	Price Estimate	Packaging
Test 4.2	Test	3	10.99	EA - Each

245 characters remaining

Additional Details

Commodity Code: 53100000
Clothing

Manufacturer Name:

Manufacturer Part No:

Product Flags

- Controlled substance
- Recycled
- Hazardous material
- Radioactive
- Rad Minor
- Select Agent
- Toxin
- Energy Star

★ Required fields ⚙ Preferred

Save Save And Add Another Close

The newly added line-item will now be added to the PO and will be highlighted in green, signifying the change.

This line item has been added

2	Test 4.2	Test	EA	10.99	3 EA	32.97	...
ITEM DETAILS							
Contract:	no value	Internal Note	no value				
Commodity Code	53100000 / Clothing	Internal Attachments	Add				
PO Clauses	Add	External Note	no value				
Is this Freight/Shipping/Handling ?	×	Attachments for supplier	Add				

The subtotal will also change and will be highlighted in green. The end user can then assign the draft or submit request.

For Items That Cannot Be Modified Directly Through AggieMart:

To have the following changes made to a PO;

- Close/Open a PO
- Cancel/Uncancel a line on a PO
- Changing Quantity PO to Cost PO

The end user will submit a **Change Request** as they would for the items that can be modified directly through AggieMart.

Once the *Create Change Request* box appears, the end user will provide the reason for the change.

Create Change Request ✕

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](#)

Lemuel Williams (Prepared by, Prepared for) <lwilliams8@ncat.edu>

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LaShawnda Miles (Approved) <lmiles@ncat.edu>

Willa Vance (Approved) <wsvance@ncat.edu>

Zachary Merrill (Approved) <ztmerrill@ncat.edu>

[add email recipient...](#)

Change Request Reason

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

Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.

[Create Change Request](#) [Close](#)

Close/Open a PO

To request a PO be closed or open, an end user will either enter “PO needs to be closed because...” or “PO needs to be opened because...” in the *Create Change Request* box.

The end user will then *Assign Draft* or *Submit Request*.

***Note:**

- The change will be manually done by Procurement Services.

Cancel/Uncancel a line on a PO

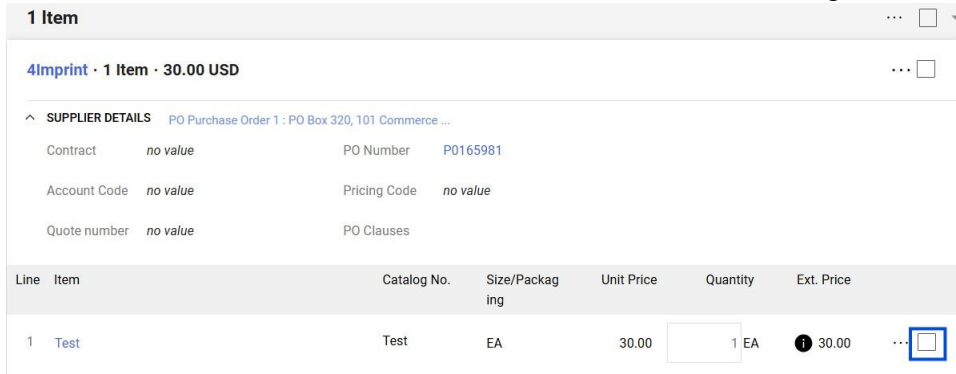
To request a line(s) on a purchase to be cancelled or uncanceled, an end user will navigate to the line item(s) that need to be cancelled or uncanceled.

***Note:**

- Canceling or uncanceled a line changes the total price of a PO and will be highlighted in green.

To Cancel a line:

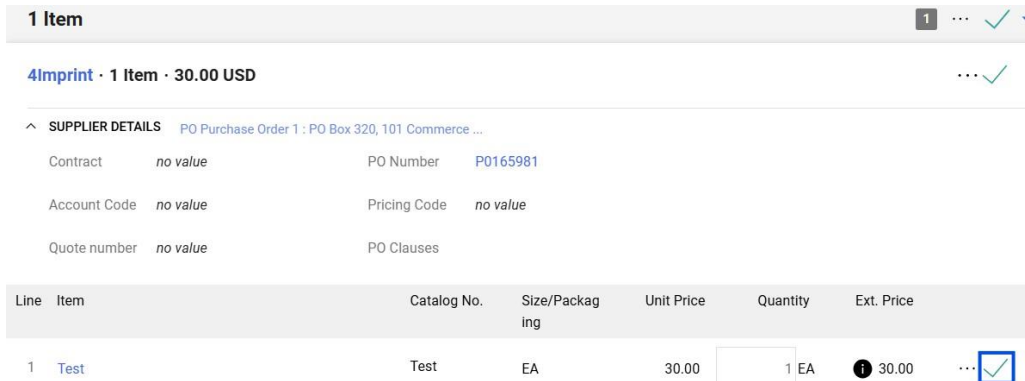
The end user will select the check box of the line-item(s) needing to be modified.



The screenshot shows a PO line item interface. At the top, it says "1 Item" with a dropdown arrow. Below that, it says "4Imprint · 1 Item · 30.00 USD" with another dropdown arrow. Underneath is a "SUPPLIER DETAILS" section for "PO Purchase Order 1 : PO Box 320, 101 Commerce ...". It lists fields: Contract (no value), PO Number (P0165981), Account Code (no value), Pricing Code (no value), Quote number (no value), and PO Clauses. Below this is a table with columns: Line, Item, Catalog No., Size/Packaging, Unit Price, Quantity, Ext. Price. The table has one row: Line 1, Item Test, Catalog No. Test, Size/Packaging EA, Unit Price 30.00, Quantity 1 EA, Ext. Price 30.00. A small checkbox is highlighted with a blue box in the rightmost column of this row.

Line	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1	Test	Test	EA	30.00	1 EA	30.00	<input type="checkbox"/>

Check the box of the line item.



The screenshot shows the same PO line item interface as above, but now the checkbox in the rightmost column of the table row is checked and highlighted with a blue box. Additionally, a small "1" icon is visible in the top right corner of the interface, indicating the number of items to be modified.

Line	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1	Test	Test	EA	30.00	1 EA	30.00	<input checked="" type="checkbox"/>

***Note:**

- A corresponding number will appear to inform the end user of the number of items that will be modified with the next action that is taken.

Select the drop-down arrow next to the checked *All Lines Actions*.

1 Item 1 ... ✓ ▾

4Imprint · 1 Item · 30.00 USD ... ✓

^ **SUPPLIER DETAILS** [PO Purchase Order 1 : PO Box 320, 101 Commerce ...](#)

Contract	no value	PO Number	P0165981
Account Code	no value	Pricing Code	no value
Quote number	no value	PO Clauses	

Line	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1	Test	Test	EA	30.00	1 EA	30.00

Select *Cancel Selected Items*

1 ... ✓ ▾ **Summary**

Draft

... ✓ **Cancel Selected Items** (SD)

Shipping, Handling, and Tax charges are estimated and charged by each supplier. They are for estimation purposes, but require workflow approvals.

Subtotal

Shipping

Specify the reason for cancelling the line when the *Cancel Selected Items* box appears.

Assign or Submit Request.

Cancel Selected Items

Specify a reason for canceling the line.



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

OK Cancel

PO Number P0165981

***Note:**

- The changed will be denoted with a red circle with a slash going through it.

Line	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1	 Test	Test	EA	30.00	1EA	 30.00

ITEM DETAILS

Contract: no value Internal Note no value

To Uncancel a line:

To uncancel a line, the same steps will be followed for canceling a line.

The difference will be the drop-down option that appears will change to *Uncancel Selected Items*.

0 Items

4Imprint · 1 Item · 0.00 USD

SUPPLIER DETAILS PO Purchase Order 1 : PO Box 320, 101 Commerce ...

Contract no value PO Number P0165981

Uncancel Selected Items

Shipping, Handling and charged by es are for estimation workflow approva

***Note:**

- A reason will still be required for line to be uncanceled.

The red circle with the slash going through it will disappear.

Assign or Submit Request

Changing Quantity PO to Cost PO

To request that a PO type be changed from quantity to cost, the end user will enter (The PO needs to be changed to a quantity PO or the PO needs to be changed to a cost PO because...) in the *Create Change Request* box.

***Note:** This change will be manually done by Procurement Services.

Assign or Submit Request.