iShopUTRGV™ *Quick Reference Guide*

<div style="background-color:orange">

How to – Change a Cost Center or Project on a Purchase Order

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iShop UTRGV allows users to Change a Cost Center or Project Number for Po's that have not been paid. Users can check on payments by looking at the "Invoice tab" on the PO record in iShop. Please review the invoice tab and make changes only if **no** invoice is included. If invoices are included, the PO change should not be submitted because the system will place the PO in error. Also, enough budget should be available in the cost center/project. iShop will process the change only if enough funding is available in the account.

Questions can be emailed to: esmeralda.rios@utrgv.edu or to iShop@utrgv.edu.

1. Set the Document Search to show "ALL". Enter the PO# in the Quick Search Bar and select the PO number. See sample below.

2. Please review the invoice tab and make changes only if **no** invoice is included. If invoices are included, the PO change should not be submitted because the system will place the PO in error.
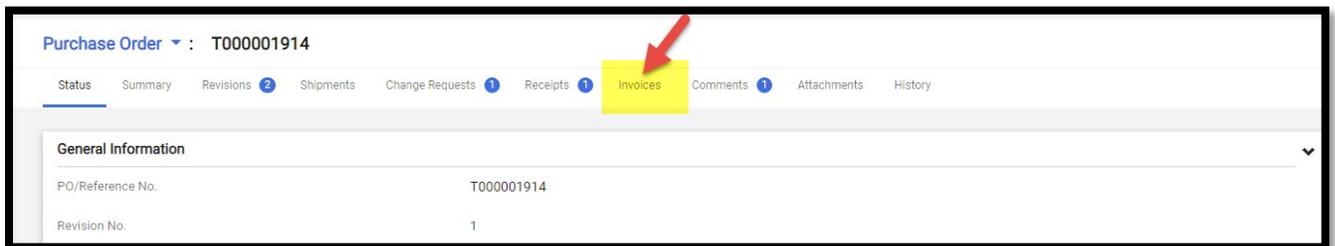
3. Click on menu to submit Change Requests. This option has been moved to the right side of the screen to a document action icon displayed with three dots (…). See sample below. Select Create Change Request.
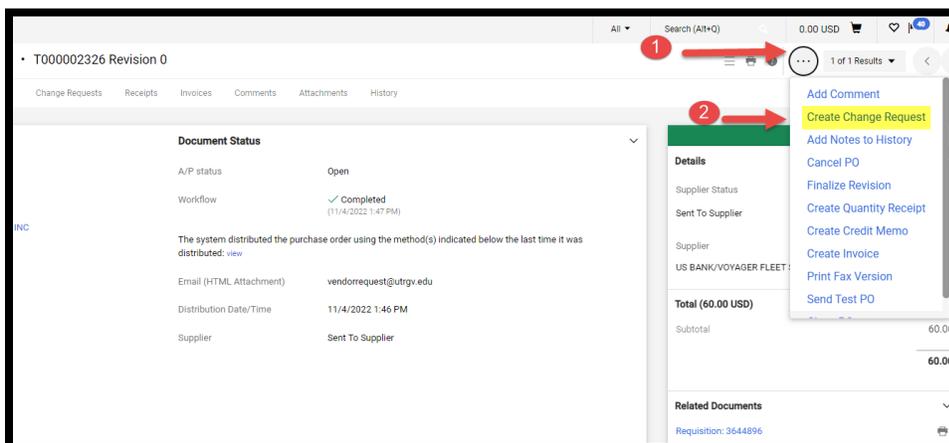
4. Select the employee that you would like to notify about this change. Enter description for the change. See sample below. Click on Create Change Request.

5. Scroll down until you get to the Accounting Codes section. Click on the pencil image.
   Note: Orders made using our showcased suppliers cannot be changed. Click on the Speed Chart field.

6. Enter the new Cost Center number. Click on the plus sign to add the new value.

7. After the new Speed Chart is selected, save the changes.

8. Scroll up to the top of the page. Click Submit Request.

9. Change request submitted notification will be displayed. Note this shows the Change Request number. Click on the Change Request number to see who needs to approve. You can send an e-mail to the approver to expedite the approval process.

10. This is the workflow. The Cost Center/Project manager's approval is required for this type of change orders. If the PO is higher than $15K, it will route to Procurement for buyer's approval. The system will update the PO with the requested changes when the workflow approval is completed.
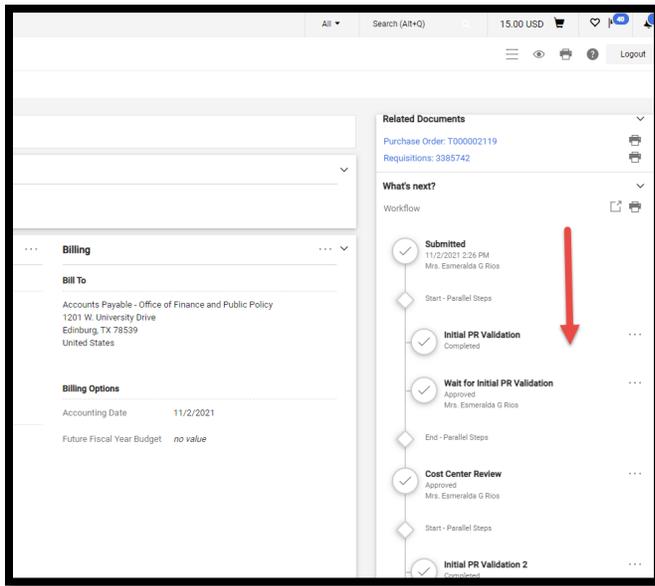
11. Users may refer to the "How to verify the PO Change in Peoplesoft" guide to see the change reflected in the financial records after Change Request is fully approved. Here is the link.
https://www.utrgv.edu/procurement/_files/documents/quick-reference-guides/ishop/ps-esmeralda-03.21.2024-how-to-verify-the-po-change-in-peoplesoft-1.docx

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