

iShopUTRGV Quick Reference Guide

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

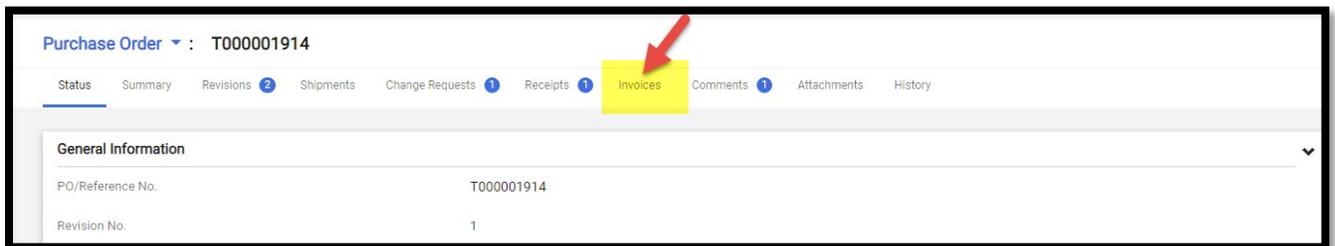
iShop UTRGV allows users to Change a Cost Center or Project Number for Po's that have not been paid. Users can check on payments by looking at the "Invoice tab" on the PO record in iShop. Please review the invoice tab and make changes only if no invoice is included. If invoices are included, the PO change 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.

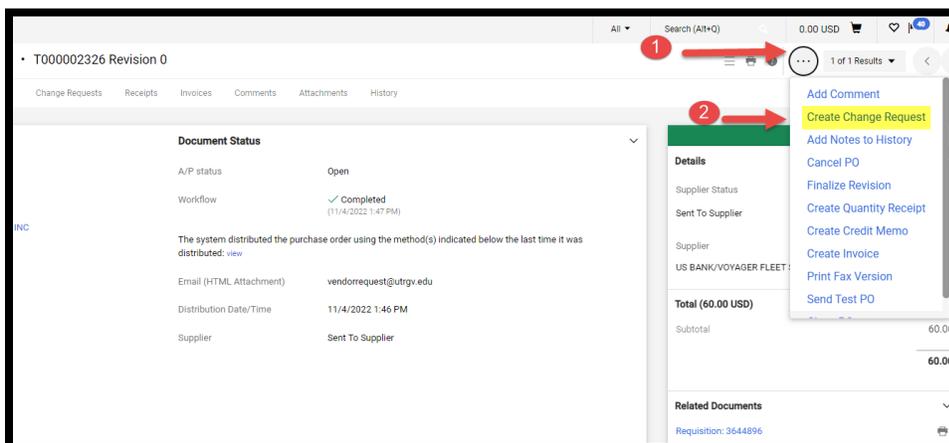
1. Set the Document Search to show "ALL". Enter the PO# in the Quick Search Bar and select the PO number. See sample below.



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.



- 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.

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):

- Laura E Juarez (Approved Requisition) <laura.juarez@utrgv.edu>
- Ms. Eva G Martinez (Prepared by) <eva.martinez1@utrgv.edu>
- Ms. Gricelda Leticia Saavedra Alvarez (Prepared for) <gricelda.saavedra@utrgv.edu>

[add email recipient...](#)

User with change request permission:

- Arnold Pedraza (Approved) <arnold.pedraza@utrgv.edu>
- Jonathan Jenaro Suchil (Approved) <JONATHAN.SUCHIL01@UTRGV.EDU>
- Manuela Cantu (Approved) <manuela.cantu@utrgv.edu>
- Mayela Ivette Moreno Martinez (Approved) <mayela.morenomartinez01@utrgv.edu>
- Ms. Sylvia Alafa (Approved) <sylvia.alafa@utrgv.edu>

[add email recipient...](#)

To change cost center from 21000059 to 21000060

953 characters remaining

Attach file to this change request (optional):

Attachment Type:

File Name:

File: No file chosen

- 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.

| Speed Chart | Account | Department | Cost Center | Project-Activity | TIBH | Will confidential/HIPPA/FERPA data be exchanged with Supplier? | Profile ID |
|-------------------------|----------------------------|------------------------------|-------------------------|------------------|-----------------------|--|------------|
| 21000059 Procurement | 64031 Rental Furn_Equip | 209040 Procurement Office | 21000059 Procurement | no value | N/A Not Applicable | N/A Not Applicable | no value |

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

Custom Field Search

21000060

| Value | Description |
|----------|--------------------|
| 21000060 | HUB Program Office |

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

Accounting Codes

| Speed Chart | Account | Department | Cost Center | Project-Activity | TIBH | Will confidential/HIPPA/FERPA data be exchanged with Supplier? | Profile ID |
|-------------|---------|------------------------------|--------------------------------|------------------|-----------------------|--|------------|
| 11000060 | 64031 | 208040 Procurement Office | 21000060 HUB Program Office | no value | N/A Not Applicable | N/A Not Applicable | no value |

Save Changes

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

Change Requests • 3397735

Submit Request

Change Request Reason

Reason: Test - To cancel one line

General

Cart Name: 2021-11-02 Jaggaer 21.3 Jaggaer Upgrade - CR(1)

Ship To: Attn: Mrs. Esmeralda 9 Rios, Department Procurement Office

Bill To: Accounts Payable - Office of Finance and Public Policy, 1201 W. University Drive

Total (500.00 USD)

Subtotal: 500.00

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.

Change Request 3400260 Submitted

Summary

Change Request number: 3400260

Change Request status: Pending

Cart name: 2021-11-03 6001136182 02 - CR

Change Request date: 11/11/2021

Change Request total: 30.00 USD

Number of line items: 1

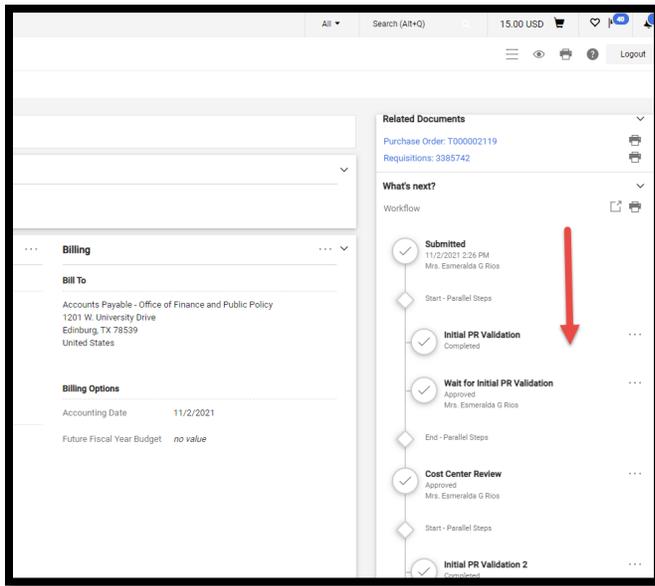
Options

Print

Recent orders

Return to your home page

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>

For questions, please send an e-mail to Esmeralda Rios at esmeralda.rios@utrgv.edu or to iShop@utrgv.edu.