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 <u>make changes only if **no** invoice is included</u>. 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: <u>esmeralda.rios@utrgv.edu</u> or to <u>iShop@utrgv.edu</u>.

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 <u>make changes only if **no** invoice is included</u>. If invoices are included, the PO change should not be submitted because the system will place the PO in error.

Purchase Order -: T00	0001914	
Status Summary Revisio	ns 2 Shipments Change Requests 1	Receipts Invoices Comments Attachments History
General Information		~
PO/Reference No.	Т0000	00001914
Revision No.	1	

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.

			All 🔻	Search (Alt+Q)	0.00 USD 👻 🗢 🏴 4
• T000002326 Revision 0					1 of 1 Results 👻 <
Change Requests Receipts	Invoices Comments Attac	hments History		2	Add Comment Create Change Request
INC.	Document Status A/P status Workflow The system distributed the purchas distributed: view Email (HTML Attachment)	Open Completed (11/4/2022 1:47 PM) se order using the method(s) indicated below the last time it was vendorrequest@utrgv.edu	Control Contro	Details Supplier Status Sent To Supplier Supplier US BANK/VOYAGER FLEET :	Add Notes to History Cancel PO Finalize Revision Create Quantity Receipt Create Credit Memo Create Invoice Print Fax Version Send Test PO
	Distribution Date/Time Supplier	11/4/2022 1-46 PM Sent To Supplier		Subtotal Related Documents Requisition: 3644896	60.00 60.00

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.

Create Change Request	×				
This will create a change request for this purchase order. If you select receive an email indicating that a change request has been created fo order.	a user they will r this purchase				
Email notification(s): Laura E Juarez (Prepared Requisition) <laurajuarez@utrgv.edu Ms. Eva G Martinez (Prepared by) <eva.martinez1@utrgv.edu Ms. Gricelda Leticia Saavedra Alvarez (Prepared for) <gricelda.saavedra@utrgv.edu></gricelda.saavedra@utrgv.edu></eva.martinez1@utrgv.edu </laurajuarez@utrgv.edu 	 				
ado email recipient					
User with change request permission:					
Arnold Pedraza (Approved) <amold.pedraza@utrgv.edu> Jonathan Jenaro Suchil (Approved) <jonathan.suchilo1@utrrv.edu> Manuela Cantu (Approved) <amoufacantu@utrgv.edu> Mayela Ivette Moreno Martinez (Approved) <mayela.morenomartinez01@utrgv.edu> Ms. Sylvia Alafa (Approved) <sylvia.alafa@utrgv.edu> add email recipient</sylvia.alafa@utrgv.edu></mayela.morenomartinez01@utrgv.edu></amoufacantu@utrgv.edu></jonathan.suchilo1@utrrv.edu></amold.pedraza@utrgv.edu>					
To change cost center from 21000059 to 21000060	-2				
953 characters remaining					
Attach file to this change request (optional):					
Attachment Type File 🔻					
File Name					
File Choose File No file chosen					
Create Change Re	Close				

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.

Accounting Codes						1	/ v
Speed Chart	Account	Department	Cost Center	Project-Activity	тівн	Will confidential/HIPPA/FERP data be exchanged with Supplier?	A Profile ID
21000059 Procurement	64031 Rental Furn_Equip	208040 Procurement Office	21000059 Procurement	no value	N/A Not Applicable	N/A Not Applicable	no value

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.

Accounting Code	s	0								
Speed Chart		Account		Department	Cost Center	Project-Activity	тівн	Will confidential/HIPPA/FERPA data be exchanged with Supplier?	Profile ID	
\$1000060	Q	64031	Q	208040 Procurement Office	21000060 HUB Program Office	no value	N/A Not Applicable	N/A Not Applicable	no value	2
										Save Changes

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

					All 🔻	Search (Alt+Q)	0.00 USD 📜 🗢 🍋 🖊
Change Requests •	3397735 🕶				= .	E Cogout	Assign Draft Submit Request
Summary PO Preview	External Communication Comments 🧃	Attachments History					
Changes will not be seen and the seen and	int to the Supplier.						Draft
						Total (500.00 USD)	~
Change Request Reas	on				<i>*</i> ~	Culstatel	500.00
	Test Te second and line					Subtoral	300.00
Reason	rest - to cancer one line						500.00
General	ø ····	Shipping	ø* · · ·	Billing	ø v	Related Documents	~
Cart Name	2021-11-02 Jaggaer 21.3 Jaggaer	Shin To		Bill To		Purchase Order: T00000211	
	Upgrade - CR(1)					Requisitions: 3385742	•
Description	no value	Attn: Mrs. Esmeralda G Rios Department Procurement Office		Accounts Payable - Office of Finance and Public Policy 1201 W. University Drive	r	What's next for my order?	~

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		Options			
Change Request number	3400260	L. Print			
Change Request status	Pending	Recent orders			
Cart name	2021-11-03 6001136182 02 - CR	Return to your home page			
Change Request date	11/11/2021				
Change Request total	30.00 USD				
Number of line items	1				

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.

	All 👻	Search (Alt+Q)	15.00 USD 🗎	♡ ∞ ↓
			∃ ⊛ 🖶	Logout
		Related Documents		~
		Purchase Order: T000	002119	
	~	Requisitions: 3385742	2	•
		What's next?		~
		Workflow		C' 🖶
 Billing	~~ ~	Submitted	26 PM	
Bill To		MIS. Latitita		
Accounts Payable - Office of Finance and Public Policy		Start - Paralle	el Steps	
Edinburg, TX 78539 United States		- Comple	PR Validation	
Billing Options		- Wait fr	or Initial PR Validation	
Accounting Date 11/2/2021		Mrs. Es	meralda G Rios	
Future Fiscal Year Budget no value		End - Parallel	Steps	
		Cost Cente Approved Mrs. Esmeral	r Review Ida G Rios	
		Start - Paralle	el Steps	
		- Comple	PR Validation 2	

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. <u>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</u>

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