

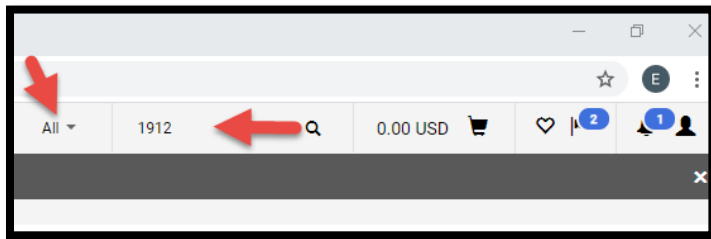
iShopUTRGV Quick Reference Guide

How to - Change Account Number (expense type) on a Purchase

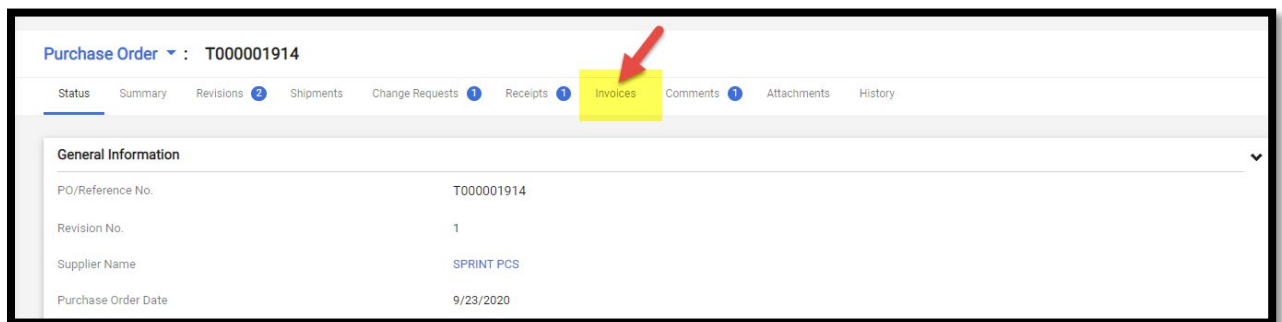
iShop UTRGV allows users to Change Account Number for PO's that have not been paid. Users can check on payments by looking at the "Invoice tab" on the PO record in iShop. Please review the invoice tab and make changes only if no invoice is included. If invoices are included, the PO change should not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

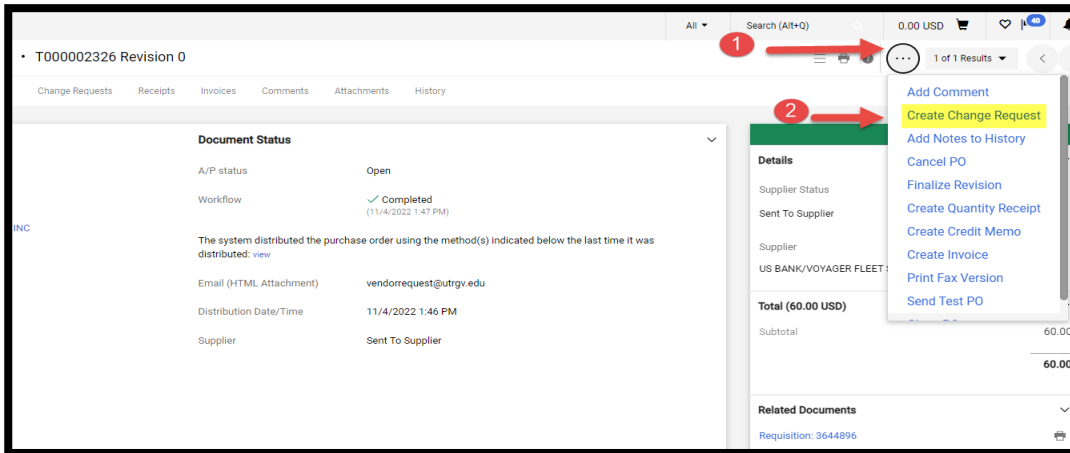
1. Set the Document Search to show "ALL". Enter the PO# in the Quick Search Bar and select the PO number. See sample below.



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.

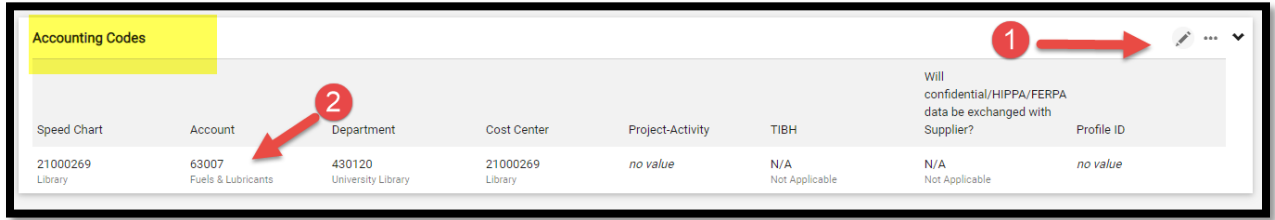


4. Select the employee that you would like to notify about this change. Enter description for the change. See sample below. Click on Create Change Request.

The screenshot shows the 'Create Change Request' form. At the top, it says 'Create Change Request'. Below that, there is a paragraph explaining that this will create a change request for the purchase order and that selecting a user will result in an email notification. The 'Email notification(s):' section has a checkbox for 'Mrs. Esmeralda G Rios (Prepared by, Approved Requisition, Prepared for) <esmeralda.rios@utrgv.edu>' and a link 'add email recipient...'. The 'User with change request permission:' section has checkboxes for several users: 'Blanca Luna (Approved) <blanca.luna@utrgv.edu>', 'Gabriela Cazares (Approved) <gabriela.cazares01@utrgv.edu>', 'Jessica Cavazos (Approved) <jessica.cavazos@utrgv.edu>', 'Laura Juarez (Approved) <laura.juarez@utrgv.edu>', and 'Linda Mares (Approved) <linda.mares@utrgv.edu>', along with a link 'add email recipient...'. A text input field contains the text 'To modify the Account number.' and is highlighted in yellow. A red arrow points to this field. Below the field, it says '971 characters remaining'. The 'Attach file to this change request (optional):' section has an 'Attachment Type' dropdown set to 'File', a 'File Name' input field, and a 'File' section with a 'Choose File' button and 'No file chosen' text. At the bottom, there is a 'Create Change Request' button and a 'Close' button. A red arrow points to the 'Create Change Request' button.

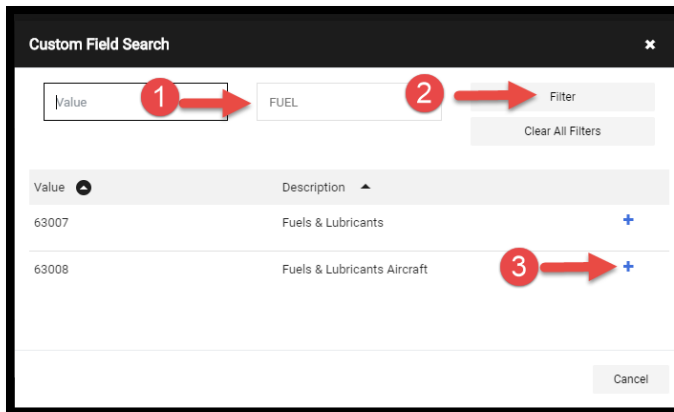
5. Scroll down until you get to the Accounting Codes section. Click on the pencil image.

Note: Orders made using our showcased suppliers cannot be changed. Click on the Account field.



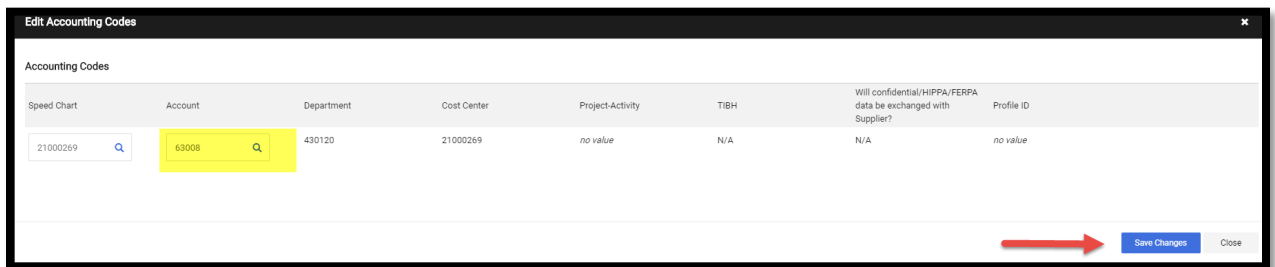
Speed Chart	Account	Department	Cost Center	Project-Activity	TIBH	Will confidential/HIPPA/FERPA data be exchanged with Supplier?	Profile ID
21000269 Library	63007 Fuels & Lubricants	430120 University Library	21000269 Library	no value	N/A Not Applicable	N/A Not Applicable	no value

6. Enter a description of the item to be searched and Click on “Filter” to reduce the number of items listed. Click on the plus sign to select the item. See sample below.



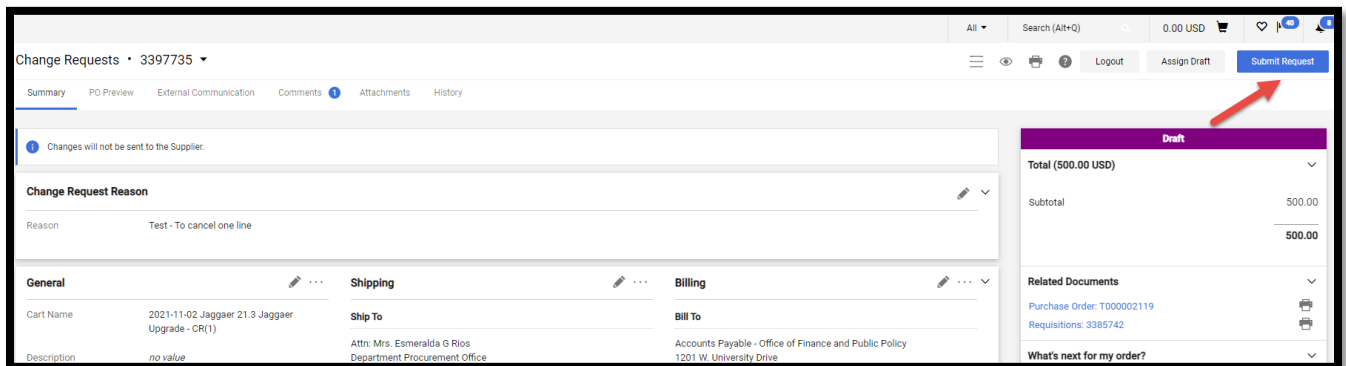
Value	Description
63007	Fuels & Lubricants
63008	Fuels & Lubricants Aircraft

7. Save the changes and Scroll up to the top of the page.



Speed Chart	Account	Department	Cost Center	Project-Activity	TIBH	Will confidential/HIPPA/FERPA data be exchanged with Supplier?	Profile ID
21000269	63008	430120	21000269	no value	N/A	N/A	no value

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



Change Requests · 3397735

Summary PO Preview External Communication Comments Attachments History

Changes will not be sent to the Supplier.

Change Request Reason

Reason: Test - To cancel one line

General **Shipping** **Billing**

Cart Name: 2021-11-02 Jaggaer 21.3 Jaggaer Upgrade - CR(1)
Description: no value

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

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

Draft

Total (500.00 USD): 500.00

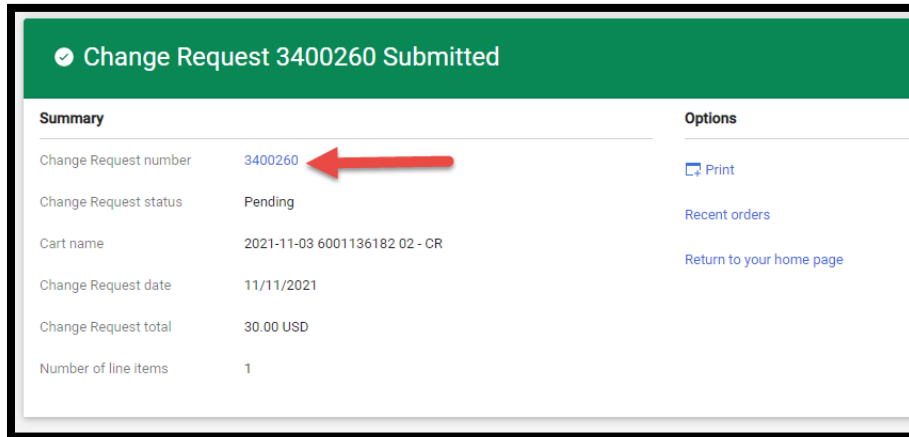
Subtotal: 500.00

Related Documents

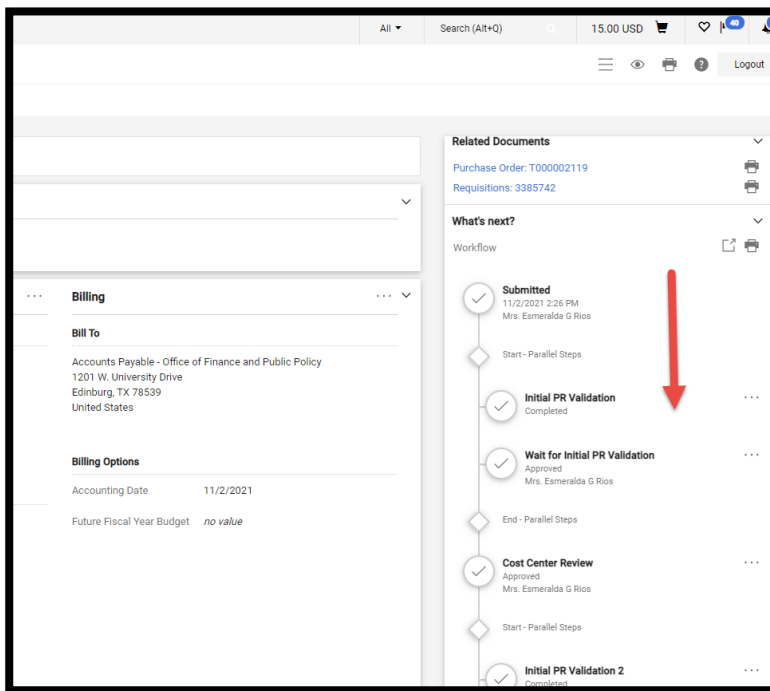
Purchase Order: T000002119
Requisitions: 3385742

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.



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.