

Creating a Change Request

Procurement Forms

Purchase Orders

General Steps

- ▶ Locate the Goods Form under Procurement Forms in Jaggaer.
- ▶ Enter the supplier name. Verify the correct address is being used.
- ▶ Enter each item from the supplier quote as a separate line item and ensure descriptions, quantities, pricing, and charges match the supplier documentation.
- ▶ Click Add and Return for multiple lines, until the requisition reflects the complete quote. Add a \$0 shipping line if applicable.
- ▶ Review the requisition for accuracy, correct any errors, and verify the shipping address and account string before proceeding to checkout.
- ▶ Attach the supplier quote, contract, estimate, or other supporting documentation to substantiate the purchase request.
- ▶ Select Place Order to submit the requisition for approval. Once approved, a Purchase Order will be issued to the supplier, and invoices must be manually uploaded to the Purchase Order for payment.

Change Request Overview

- ▶ Procurement Forms are used to request goods or services that are not available through a Jaggaer Punchout Catalog.
- ▶ Use a Change Request to update an existing Purchase Order (Procurement Form) after it has been approved, such as increasing the total amount, revising line items, updating account strings, or correcting the Purchase Order to match a supplier invoice.

Create a Change Request

- ▶ Locate and open the original Purchase Order, then select the three-dot menu and choose Create Change Request.
- ▶ Enter a clear Change Request Reason describing what is being changed, then select Create Change Request. ***You do not need to select a recipient.***

Purchase Order • Smith Temporaries dba Corne... • P00120016 Revision 0

Status Summary Revisions 1 Confirmations Shipments **Change Requests 1** Invoices 15 Comments 3 Attachments History

⚠ You are viewing a PO that has unfinalized edits.

Records found: 1

+

Change Request Reason

Enter Change Request Reason here.

967 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

Revising the PO

- ▶ **For account strings:** navigate to the affected purchase order line and select the three-dot menu for that line. Choose **Accounting Codes** and make the necessary updates to the account string.
 - ▶ Select the pencil on the Summary page under Accounting Codes to adjust the entire PO.
- ▶ **Specific line items:** Select the line item directly to open it. Update the description, quantity, unit price, or other applicable information as needed, then select Save.
- ▶ **Add an item:** Click on a line item, enter the new information, and select Add and Go to Cart instead of Save. This will add the item you have updated, keeping the original line item the same.

Revising the PO

► Accounting Strings: Two ways.

Smith Temporaries dba CornerStone Staffing · 1 Item · 21,750.00 USD

^ SUPPLIER DETAILS

Contractno value

PO NumberP00120016

Line	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1	Finance & Administrations temporary staffing			21,750.00	Qty: 1	21,750.00

^ ITEM DETAILS

Onsite Contact: Johnny Trevino

Contract: no value

Internal Note: no value

Onsite Contact: 817-257-1705

Commodity Code: no value

Internal Attachments: Add

Phone Number

Charge Back: no value

External Note: no value

more info...

Services: ✖

Attachments for supplier: Add

Related Documents

Purchase Order

Requisition

What's next

Next Step

Approver

...

Override

Delivery Options

Billing Options

Accounting Codes

- OR -

Accounting Codes

GL Unit

Account

Fund

Department

Project

TCU Texas Christian University	6410 Services	11000 TCU General	22200 Financial Services	no value
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✎ ...

Revising the PO

- **Adjust Existing Line Items:** Open your line item, adjust, click save. Close returns you to your Change Request.

Smith Temporaries dba CornerStone Staffing · 1 Item · 21,750.00 USD

^ SUPPLIER DETAILS

Contract *no value* PO Number

Line	Item	Catalog
1	Finance & Administrations temporary staffing	

^ ITEM DETAILS

This example is adjusting the overall dollar amount down to make the PO Fully Matched, as no additional invoices are expected.

Service Information

Commodity Code

Description ★

Estimated Price ★

Requested Service Start By Date: ★

Requested Service End By Date: ★

Information for Service Provider

Onsite Contact: Name ★

Onsite Contact: Phone Number ★

Onsite Contact: Email ★

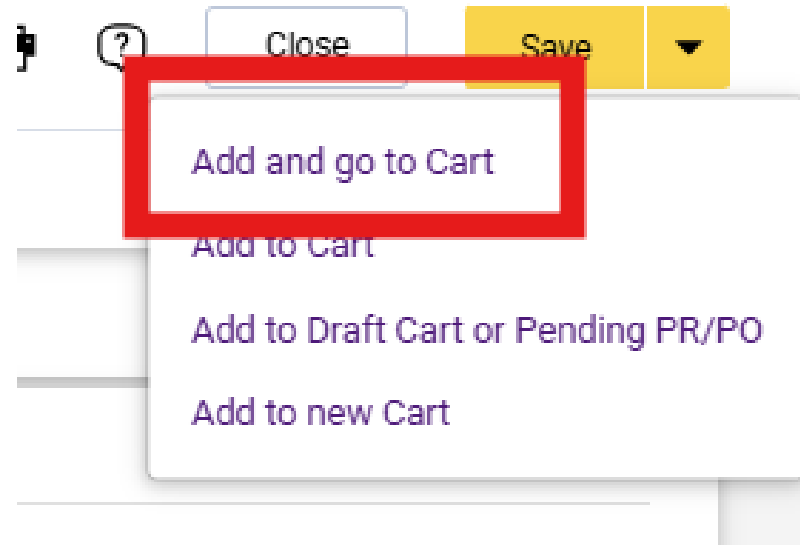
External Attachments [Add](#)

Internal Information

Internal Attachments [Add](#)

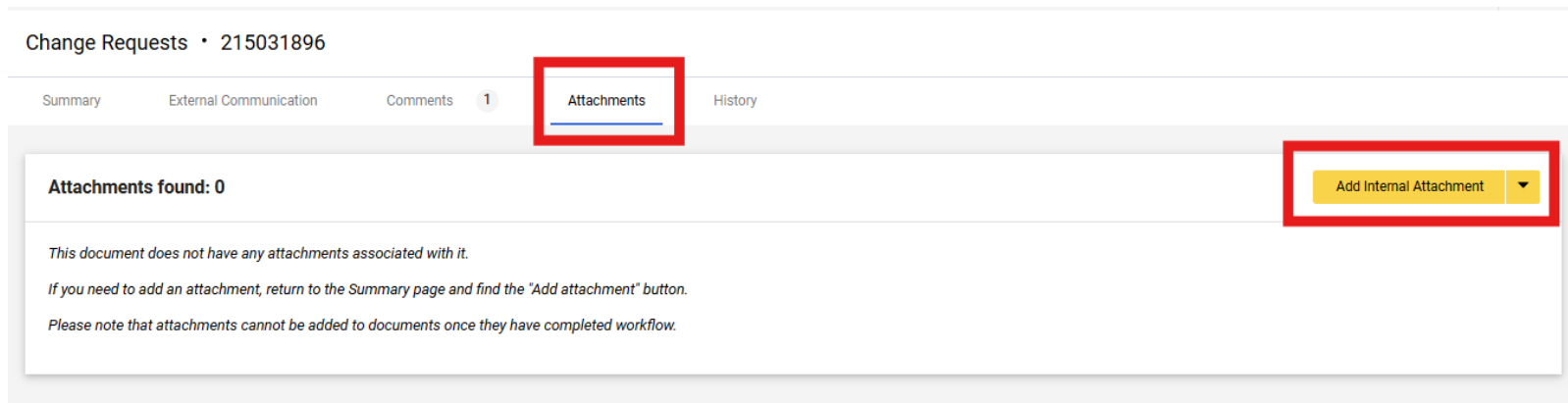
Revising the PO

- ▶ **Add an Item:** Follow the same process as in the previous slide, but click “Add and Go to Cart” instead of Save.
- ▶ Use this method to add shipping charges.
- ▶ The items will then need to be manually added to a change request using the three dot menu next to the line item. Select “Add to Draft Change Request” and select the appropriate change request.



Attach Documentation

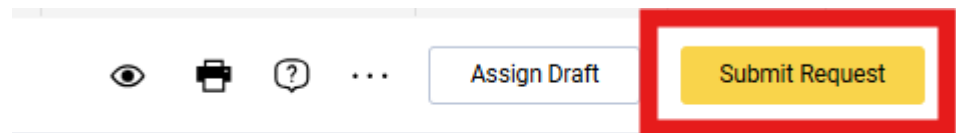
- ▶ ***Click close to return to the change request if you have not already. Open the draft change request if you were adding line items.***
- ▶ Attach any documentation supporting the requested change, such as an updated quote, revised pricing, additional scope of work, shipping charges, or an invoice that exceeds the current Purchase Order amount.
- ▶ Open the Attachments tab and select Add Internal Attachment to upload supporting documents.



The screenshot displays the 'Change Requests' interface for request ID 215031896. At the top, a navigation bar includes tabs for 'Summary', 'External Communication', 'Comments' (with a count of 1), 'Attachments' (highlighted with a red box), and 'History'. Below the tabs, a message states 'Attachments found: 0'. To the right of this message, a yellow button labeled 'Add Internal Attachment' with a dropdown arrow is highlighted with a red box. Below the button, three lines of instructional text are provided: 'This document does not have any attachments associated with it.', 'If you need to add an attachment, return to the Summary page and find the "Add attachment" button.', and 'Please note that attachments cannot be added to documents once they have completed workflow.'

Review & Submit

- ▶ Review all revisions to ensure the Purchase Order accurately reflects the requested changes before selecting Submit Request.
- ▶ The Change Request will route through workflow approval and display a Pending status until all required approvals have been completed.



After Approvals

- ▶ Approval of a Change Request updates the Purchase Order but does not process payment to the supplier.
- ▶ Supplier invoices must still be manually uploaded to the Purchase Order through the Manual Invoice Upload process before payment can be issued.

An aerial photograph of the Texas Christian University (TCU) campus, showing various buildings with red-tiled roofs, green lawns, and surrounding trees. The image is framed by a purple and white geometric border.

Finance & Administration
Office of Procurement

QUESTIONS?

Email

Procurement@tcu.edu

TCU