Change Requests

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Agenda

- Change request basics
- Follow the workflow
- Rejecting and withdrawing
Change request basics
What is a change request?

• A BUY.IU document used by departmental staff to update purchase order (PO) information. The department enters the requested changes on the document. Amendments are no longer initiated by Purchasing staff.

• Most frequently used to adjust POs that will continue to be used.

• Examples of PO changes:
  o Adding or reducing funds
  o Updating account funding
  o Adding or removing quantities
  o Adjusting recurring PO dates
When to submit

• Change requests should be submitted as soon as you are aware a PO needs adjusted.
  o Updating the PO helps avoid invoices routing to Matching Exception.

• Purchasing will prompt you to initiate a change request if one is needed and you have not already begun the process.
  o Invoices approved out of the Matching Exception workflow stop route to Purchasing for review/approval.
  o Purchasing staff **will not** approve the invoice until the change request is initiated.
Considerations when submitting

• Only one change request can be enroute at a time.
  o Try to combine as many edits as possible on one document.

• Remember: segregation of duties.
  o Document submitters cannot approve their own documents.

• It is not necessary for a change request to reach completed status before approving an invoice for payment.
  o Approve the invoice once the change request has been initiated.
  o If additional invoices will be submitted, follow the change request through the workflow.
Following the workflow
Why follow the change request?

• New BUY.IU invoices nullify enroute change requests.

• If you expect additional invoices, follow the document through the workflow to ensure it is approved as quickly as possible.

• Nullified change requests must be rejected by an approver or withdrawn by the submitter.
  o There is no way to copy a change request – the process must be started over from scratch.
Change request workflow
Change request workflow

Change Request Approvals

- Show skipped steps: [ ]
- Orientation: Vertical

Submitted by Mary Kendall
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- Initial Employee Check
  - Completed

- Wait for Employee Check
  - Approved

- Workflow Delay Step
  - Completed

- FO Approval
  - Approved
  - Sarah Hamilton

- Org Review
  - Active
  - View approvers
Change request workflow
Contacting approvers

• Log a comment on the change request and add the approver(s) as email recipients.
  o This is the preferred method – it captures the communication in BUY.IU.
  o When contacting Purchasing, tag purhelp@iu.edu in your comment.
  o Review the Comments in BUY.IU document to learn more.
Rejecting and withdrawing
Rejecting change requests

- Change request approvers must reject change requests nullified by new invoices.
Reject steps

• Assign the change request to yourself.

• Open the Document Actions menu.

• Select “Reject Change Request.”

• Log a comment explaining why change request is being rejected, ie:
  o “Change request nullified by new invoice. Please submit a new change request.”
  o The comment is sent to the change request submitter and notifies them of the need for a new change request.

Change request approval guide in development.
Withdrawing change requests

• Change request submitters can also withdraw change requests.
• The status of the change request does not change when nullified.
Withdraw steps

• Orders module.

• My Orders > My Change Requests.

• Locate the change request and open.

• Open the Document Actions menu.

• Select “Withdraw Change Request.”

• Log a comment explaining why change request is being withdrawn, ie:
  o “Change request nullified by new invoice. Will submit new change request.”

Review the Withdraw a Change Request document for full details.
Resources

• **Completing a Change Request**
  - Timing considerations
  - Step-by-step instructions for eight different PO edits

• **Withdraw a Change Request**
  - Submitter guide for withdrawing a change request

• **Comments in BUY.IU**
  - How to log and view comments

• **Change Requests and Pending Invoices** newsletter article.
KEEP CALM AND
ALWAYS ASK QUESTIONS

Questions?
Thank you!

Thanks So Much!