

## Troubleshooting and Locating Your Change Requests in myUF Market

### Overview

The change order functionality in myUF Marketplace allows users to make changes to POs using the Change Request form. As of October 28, 2019, Procurement no longer processes change orders. Only those with the security role of UF\_N\_MKT\_Requestor can create, make changes and submit change requests.

Changes include the following – please see separate instruction guides for each:

- Increases and decreases of quantity and amount (cannot decrease below vouchered quantity or amount)
- Canceling or adding a line with the option to resend to supplier
- Changing ChartFields (cannot change on line already vouchered)

**Note: Change Requests are no longer used to close a PO and release an encumbrance.** To close the purchase order, click on the Available Action dropdown in the top right corner, and select Close PO, then click the Go button. The system will close the PO and resend to myUFL. Closed POs get budget checked in myUFL each night to release encumbrances. Please refer to the “Closing a Purchase Order to Release Encumbrances” instruction guide.

Submitted change requests will follow the same workflow as the original requisition, then merge the new changes into the original purchase order and resend it to myUFL to update the PO. Financial approvers need to approve change orders and can refer to the “Approving Change Orders for Financial Approvers” instruction guide.

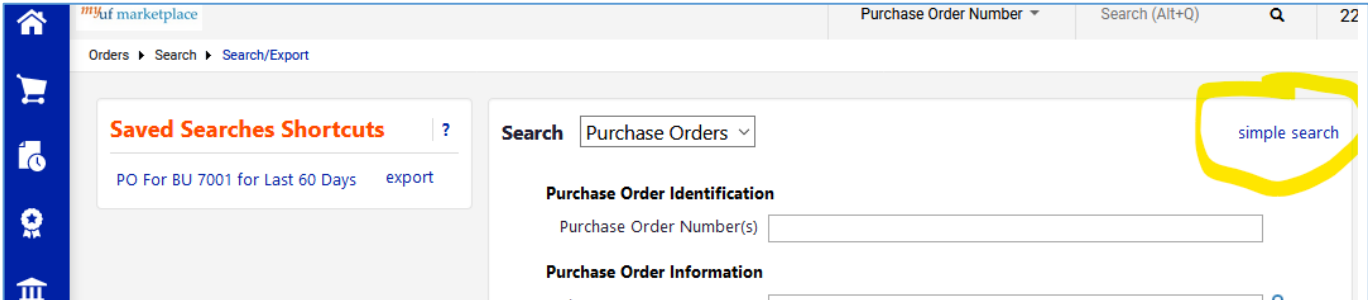
### **TIPS:**

- Before a change request can be submitted, POs need to be Dispatched and Valid in myUFL, and invoices cannot be in process in myUF Marketplace.
  - Before starting a change order, go to Financials > Purchasing > Purchase Orders > Review PO Information > Purchase Orders to verify the PO.
- Before paying the last invoice on a PO, create the increase to the PO **before** you fully pay the PO. Once fully invoiced, a change request won't be available to complete.
- Please note that change requests cannot be used for Internal Service Providers such as Facilities and UF IT, or for enabled vendors that have punchouts or catalogs. Look for this symbol to identify suppliers that are enabled:

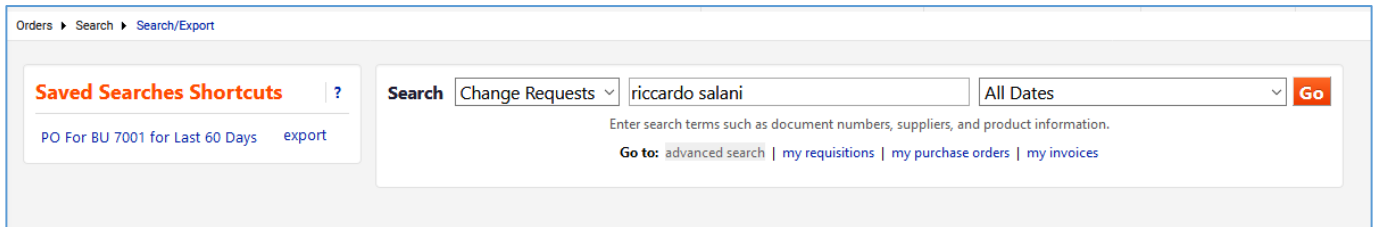


## To Find All of Your Completed Change Orders in the System

1. Go to Orders > Search > Search Export
2. Make sure you are in the Simple Search not the Advanced Search (click on Simple Search on the top right if you see it).



3. Select Change Requests from the dropdown, enter a keyword, such as the name of the person that initiated the change request, and select a date range. Click Go.



4. At the search results, the Amount of Change column shows the decrease or increase; and the symbol on the left of the change request will show the status.
  - a. A red X means it was rejected.
  - b. Circling blue arrows means it is pending in workflow and PO is not updated yet.

Change Request No.	Supplier(s)	Requisitioner	Change Request Date/Time	Change Request Total	Original PO Total	Amount of Change	Related PO No.
131561902	Jennifer Rivers	William Triay	4/21/2020 12:00 PM	83,932.50 USD	99,742.50 USD	-15,810.00 USD	2000777024
131543775	Craft Electric Inc	Mark Humbert	4/20/2020 3:09 PM	96,020.50 USD	94,525.25 USD	1,495.25 USD	2000756653
131541269	Jerome Guilford	Mark Humbert	4/20/2020 2:14 PM	7,014.50 USD	2,236.50 USD	4,778.00 USD	2000753556
131540821	The Whiting Turner Contracting Company	Brian Giunta	4/20/2020 2:04 PM	0.00 USD	43,629,201.28 USD	-43,629,201.28 USD	1800559863
131539775	Complete Network Solutions Inc	David Hamm	4/20/2020 1:38 PM	3,151.25 USD	2,531.25 USD	620.00 USD	2000768206
131512141	George F Young Inc	Brian Giunta	4/17/2020 2:16 PM	25,455.00 USD	25,455.00 USD	0.00 USD	1900688454
131410677	2 Lebold Investors LLC	Brian Giunta	4/13/2020 1:57 PM	5,135.00 USD	3,796.00 USD	1,339.00 USD	2000795515

- Click on the change request number to see why it is pending. The change request will open and show the step. You may also click on Change Request Approvals to see the workflow steps.

Back to Results 1 of 348 Results

**Change Requests: 131561902**  
JRC MP05997 - 3946 - Segui-Kirby Smith ...

Status: Pending  
Document Total: 83,932.50 USD  
View Related Documents

Change Requests

**Summary**

Cart Information

Ship To

Bill To and PCard

Chartfields

Internal Notes and Attachm...

External Notes and Attach...

Supplier Information

Change Request Approvals

**Summary** Document Actions History

Expand All Collapse All

Edited Sections

- Line item only fields

**External Communication Options** Edit Section

Resend to Suppliers on Change Request false

Resend to ERP System Connections on Change Request false

**Cart Information**

Status Pending Financial Approval 4/21/2020 12:00 PM JRC MP05997 - 3946 - Segui-Kirby Smith Research Library Bldg - Small Int/Ext Repairs - CR

Submitted

Cart Name

- In the Change Request Approvals screen, the step with the double line around it is the pending step. Click on View Approvers to see who the approvers are.

**Change Requests: 131561902**  
JRC MP05997 - 3946 - Segui-Kirby Smith ...

Status: Pending  
Document Total: 83,932.50 USD  
View Related Documents

Change Requests

**Change Request Approv...**

Comments 1

Attachment Overview 2

**Change Request Approvals** Document Actions History

Show skipped steps

Orientation Horizontal

Submitted Riccardo Salani On behalf of: William Triay 4/21/2020 12:00 PM

Combo Edit Validation Completed

Financial Approval Active View approvers

Budget Validation Future View approvers Expedite

Create PO Future Expedite

Finish Expedite

**Change Requests: 131561902**  
JRC MP05997 - 3946 - Segui-Kirby Smith ...

Status: Pending  
Document Total: 83,932.50 USD  
View Related Documents

Change Requests

**Change Request Approv...**

Comments 1

Attachment Overview 2

PO Preview

**Change Request Approvals** Document Actions History ?

Show skipped steps

Orientation Horizontal

Submitted Riccardo Salani On behalf of: William Triay 4/21/2020 12:00 PM

Combo Edit Validation Completed

Financial Approval Active View approvers

Budget Validation Future View approvers Expedite

Create PO Future Expedite

Finish Expedite

**Workflow Step Approvers (Financial Approval) ? X**

Approver Group : Dept Id: 75060000 (CON-PLANNING, DESIGN & CONSTR): (75,000.00 - 499,999.99) USD

Eugene Herring eeh@ufl.edu

Frank Phillips fwp@ufl.edu

Close

- For a rejected change request, click on the History link on the top right to find the reason for rejection.

**Change Requests: 131540821**  
UF-461 Whiting Turner - CR(3)

Status: **Rejected**  
Document Total: **0.00 USD**  
[View Related Documents](#)

Change Requests ▾

**Summary**

Cart Information  
Ship To  
Bill To and PCard  
Chartfields  
Internal Notes and Attachm...  
External Notes and Attach...

**Summary**

**External Communication Options**

Resend to Suppliers on Change Request: false  
Resend to ERP System Connections on Change Request: false

**Cart Information**

Status: **✖ Rejected**  
(4/20/2020 2:04 PM)  
Submitted: 4/20/2020 2:04 PM  
Cart Name: UF-461 Whiting Turner - CR(3)  
Description: Early Release GMP Package

Document Actions ▾ History 🖨️ ?  
Expand All Collapse All

- Look under the Note column to find the error.

Click to filter history ?

Export CSV

Results Per Page: 20 Records found: 14 Page 1 of 1 ?

Line No	Date/Time	User	Step(s)	Action	Field Name	From	To	Note
	4/20/2020 2:04 PM	System	Combo Edit Validation	Requisition budget check failed				Requisition 131540821, Exceeds Budget Tolerance on Line 5, Schedule 1, Distribution Line 1.
Line 4	4/20/2020 2:04 PM	System	Combo Edit Validation	Requisition line budget check failed				Requisition 131540821
Line 5	4/20/2020 2:04 PM	System	Combo Edit Validation	Requisition line budget check failed				Requisition 131540821

- You may also export the search results by clicking the Export Search button at the search results screen, giving it a file name and clicking Submit. When the report is blue, it is ready to download as a .CSV file.

**Document Search Export**

**Request Export** (Step 1 of 1) ?

File Name \*

Description

Request Export Template

Description

\* Required

10. The .CSV file will show the status of the change requests and you may sort by “Pending” to follow up on the change requests.

A	B	C	D	E	F	G	H	I
Status	Change Request	Supplier(s)	Requestor	Change Request Date	Change Request Total	Original PO Total	Amount of Change	Related PO Number
Pending	131561902	Jennifer Rivers	Triay, William	4/21/2020 12:00	83932.5	99742.5	-15810	2000777024
Completed	131543775	Craft Electric Inc	Humbert, Mark	4/20/2020 15:09	96020.5	94525.25	1495.25	2000756653
Completed	131541269	Jerome Guilford	Humbert, Mark	4/20/2020 14:14	7014.5	2236.5	4778	2000753556
Rejected	131540821	The Whiting Turner Contracting Company	Giunta, Brian	4/20/2020 14:04	0	43629201.28	-43629201.28	1800559863
Pending	131539775	Complete Network Solutions Inc	Hamm, David	4/20/2020 13:38	3151.25	2531.25	620	2000768206
Completed	131512141	George F Young Inc	Giunta, Brian	4/17/2020 14:16	25455	25455	0	1900688454
Completed	131410677	2 Lebold Investors LLC	Giunta, Brian	4/13/2020 13:57	5135	3796	1339	2000795515

### To Find Your Draft Change Orders in the System

11. Go to **Orders > View My Draft Change Requests** to find change requests you have started and any assigned to you. From here, you may delete or view draft change requests.
12. You may withdraw your change request by going to **Orders > Search Orders > Change Requests**, (use Simple Search) - click on the change request number to open, then clicking **Document Actions > Withdraw Change Request**.



### Notifications

In the User Profile under Notification Preferences > Change Requests, activate email notifications to be alerted if a Change Request is rejected/returned or if you need confirmation of when a Change Request has completed workflow and the changes have been merged into the PO and updated the PO. Click the Edit link on the top right and click Override to select which email notifications you would like to activate.

### Gator Requestor

User Name: urequestor

- User Profile and Preferences >
- Update Security Settings >
- Default User Settings >
- User Roles and Access >
- Ordering and Approval Settings >
- Permission Settings >
- Notification Preferences ▾
  - Administration & Integration
  - Shopping, Carts & Requisitions
  - Change Requests**
  - Purchase Orders
  - Accounts Payable
  - Receipts
  - Contracts
  - Supplier Management
  - Form Requests
  - User History >

### Notification Preferences: Change Requests

Edit Section

Draft Change Request Assigned Notice ?	None
Assigned Change Request Processed Notification ?	None
Assigned Change Request Deleted Notification ?	None
Change Request Deleted ?	None
Change Request submitted into Workflow ?	None
Prepared By - Change Request Assigned Notice ?	None
Prepared By - Change Request rejected/returned ?	Email
Prepared By - PR and PO Notifications ?	None
Change Request pending approval in Workflow ?	None
Change Request Workflow Notification available ?	None
Change Request Workflow complete / Merged to PO ?	Email
Change Request rejected/returned ?	None

## Additional Assistance

myUF Marketplace – Marketplace Help Desk

Email: [myUFMarketplace@ufl.edu](mailto:myUFMarketplace@ufl.edu)

Phone: (352) 392-1335