Changing ChartFields on a PO Using Change Requests in myUF Marketplace

Overview

The change order functionality in myUF Marketplace allows users to make changes to POs using the Change Request form. Onlythose with the security role of UF_N_MKT_Requestor can create, make changes and submit change requests. Change requests may be used to change ChartFields on a distribution line, however not if the line has already been vouchered or if the PO is in budget error. Submitted change requests will follow the same workflow as the original requisition, unless there is a new or different Dept ID, in which case it will routeto the Financial Approver for that Dept ID. 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.
- 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 start a Change Request on a PO in myUF Marketplace:

1. On the purchase order's screen, click the black triangle near the PO number to show the dropdown menu, and select **Create Change Request**. If you need to close the PO instead, click on **Close PO.**
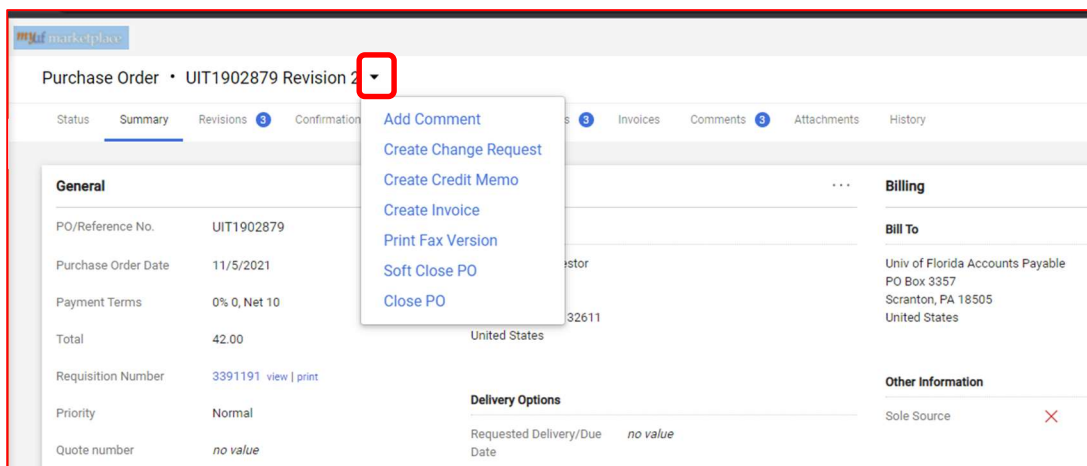
2. The **Create Change Request** form will display. In the **Change Request Reason** box, enter the reason for the change and type of change. Select or add anyone that needs to receive an email.

Create Change Request   ✕

This will create a change request for this purchase order. If you select a user they will receive an email indicating that a change request has been created for this purchase order.

Email notification(s) | Add recipient

✓   Gator Requestor (Prepared by, Prepared for) <mpreisl@ufl.edu>

☐   Marianne Preisler (Approved Requisition) <mpreisl@ufl.edu>

User with change request permission:

☐   Amanda Sapp (Approved) <amandacsapp@ufl.edu>

☐   Brandi Calderon (Approved) <brandi.calderon@jax.ufl.edu>

☐   Brent Christner (Approved) <xner@ufl.edu>

☐   Gator Requestor1 (Approved) <mpreisl@ufl.edu>

☐   Pamela Tribue (Approved) <ptribue@ufl.edu>

add email recipient...

Change Request Reason

Changing Chartfields per Dr. Smith to add her project.

946 characters remaining   expand | clear

Attach file to this change request (optional):

Attachment Type   ⦿ File   ○ Link/URL

File Name   [   ]

File   Choose File   Upload your file

Create Change Request   Close

3. Click the **Create Change Request** button to open the form. Changes will not take place until the form is submitted into workflow.

Changing ChartFields:

4. To change ChartFields, **click the Eyeball icon on the top right to select a view, and select View Chartfields Only**

5. From here you can view all the Chartfields for each line. To edit, click the **Pencil icon** above each ChartFields line or split distributions:

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6. Make your changes and click **Save** to save them.

Submitting the Change Request Into Workflow:

7. When done, scroll back up to the top and click **Submit Request** or **Assign Draft**. Completed change requests merge with the PO after requisition and PO workflow and export to myUFL.

Additional Assistance

myUF Marketplace – Marketplace Help Desk

Email: myUFMarketplace@ufl.edu

Phone: (352) 392-1335

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