The PO and Encumbrance Change Request System is available from the WebRaider portal, HSC El Paso Finance tab, in the Purchasing Services channel.

Reports that will help you manage departmental POs and General Encumbrances are available in the Cognos at the following path: Public Folders > HSC El Paso Finance > Encumbrances, Invoices and Checks. Please review these reports on a regular basis. The reports are:

- **Encumbrance Detail** – Enter an encumbrance number (P0...or EI...) to see item and sequence detail of any encumbrance open or close for any fiscal period.

- **General Encumbrance Crosswalk** - Enter a TechBuy PO number for prior to 2015, encumbrance number in the “Doc Ref No:” field and the report will provide the associated Banner EH encumbrance number or enter the Banner EH encumbrance number in the “Encumbrance No:” field and the report will provide the associated TechBuy encumbrance number. This report provides general information about the encumbrance with a drill down to the item and sequence detail.

- **Open Encumbrances Outstanding** – Select any combination of parameters and run this report to see all open POs and General Encumbrances that meet the parameters entered. This is a good...
report to see all open encumbrances for your department or a particular fund and provides encumbrance item and sequence detail information

- **Encumbrances Closed** – Select any combination of parameters and run this report to see all closed POs and General Encumbrances that meet the parameters entered. This report provides encumbrance item and sequence detail information.

The following table outlines the options available for both a Purchase Order (PO) and a General Encumbrance (EI):

<table>
<thead>
<tr>
<th></th>
<th>Close All Items</th>
<th>Close Specific Item/Sequence</th>
<th>Modify</th>
<th>Add FOAP</th>
<th>Reopen</th>
</tr>
</thead>
<tbody>
<tr>
<td>PO</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>No – user must contact Purchasing Department at <a href="mailto:PurchasingElp@ttuhsc.edu">PurchasingElp@ttuhsc.edu</a></td>
</tr>
<tr>
<td>EH</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>No – Banner will not allow re-opening of a General Encumbrance</td>
</tr>
</tbody>
</table>

*** Keep in mind that the PO and General Encumbrance information you see in the application is as of close of business yesterday. Because this information is updated nightly, you can submit only one PO or Encumbrance Change Request per day for a PO or General Encumbrance.
Process Outline:

To begin the PO or Encumbrance change request, select “Request Change Order” from the menu on the left side of the PO and Encumbrance Change Request application webpage.

Enter the PO number (P0…) or General Encumbrance Number (El…) and click “View”.

Closing the lines:

Enter an explanation in the Notes section below the request date. Check the lines that you want to close and for the PO / Enc line and click on the Submit Request. The “closed lines” will be highlighted in red.

Note: To “Close” an individual line, it is not necessary or possible to modify the line item to a zero dollar amount.

Review to make sure that you selected the item / line that you meant to select and click “Submit”. To view the request or print a copy, click on the hyperlink with the PO Number.
Add a FOAP / FOAPs:

Currently adding a new FOAP through the PO/Encumbrance System is not supported. To add a new FOAP line or lines to a PO or General Encumbrance please contact Purchasing Department at PurchasingElp@ttuhsc.edu
Increase / Decrease:
To increase or decrease lines / items on a PO or General Encumbrance select “Request Change Order” from the menu on the left side of the webpage. Enter the PO or General Encumbrance number and click “View”.

Enter the new amount in the “Proposed Amt” field that you wish to increase or decrease the PO or Encumbrance line. The system will automatically recognize whether it’s an increase or decrease and will mark the new amount with a “green up” or “red down” arrow respectively. Enter an explanation in the “Notes” box, then click “Submit Request”.
Re-Open a PO Item /Items:

To request a reopening of a PO or PO Lines, please contact Purchasing Department at PurchasingElp@ttuhsc.edu
Dashboard:

The dashboard is designed to give you the summary of the requests created by you. To access your dashboard, select the “Dashboard” from the menu on the left side of the webpage.

You will see the POs change requests “Submitted” by you, “Returned” to you, “Approved” POs submitted by you and “Deleted” POs submitted/created by you.

To inquire more details about each of these POs, click on the Request ID or PO_Number.
Reports:

The “Reports” menu allows the user to search and export the list of the POs meeting the search criteria. Enter the desired parameter(s) for the results you want to search for and click “Search” to view a list of the Change Requests.

By selecting “Export Search” instead of the “search” you will have the list of POs meeting your search criteria in pdf format.
Click on the Request ID or PO_Number in red to view the Change Request details.

You can view or print the request in a pdf format by clicking on the “PONumber” link in red below the PO and Encumbrance Details.

For additional information please contact PurchasingElp@ttuhsc.edu