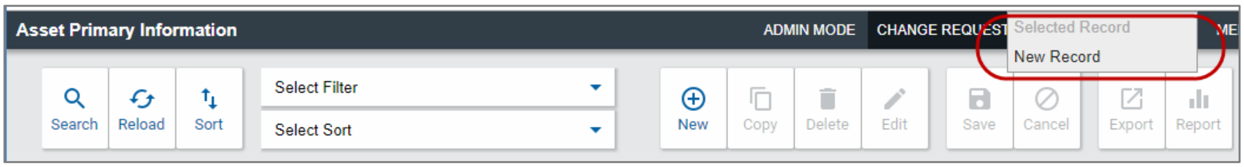
Enterprise Portal has the ability to request a change on any screen. The purpose of this feature is to allow requests, but not direct edits using screen rights. Only filterable screens can use this feature. Screens that are non-filterable and only have one record like base options and part options cannot use change requests.



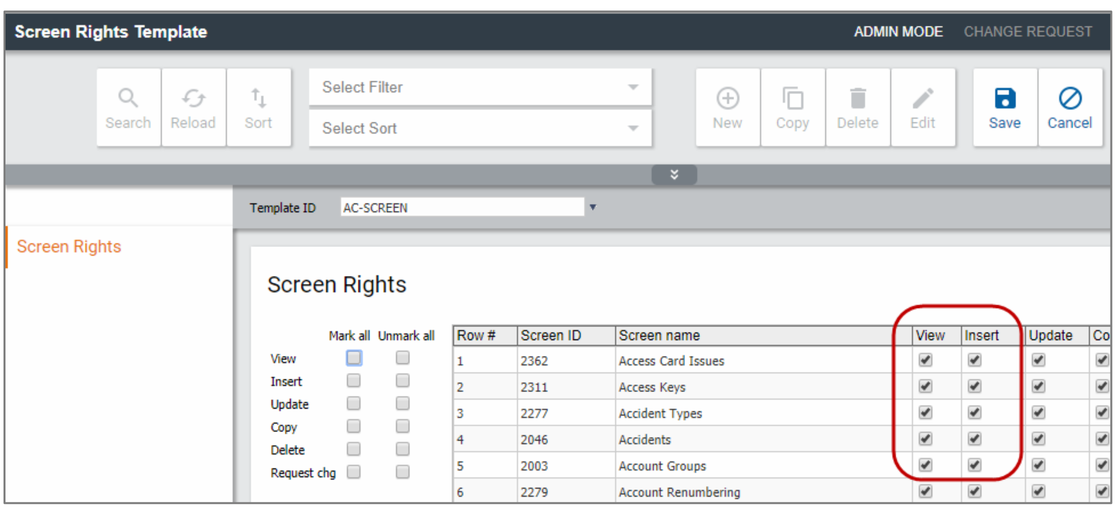
The menu item for Change Requests is located on the top, right toolbar of Enterprise Portal. This menu item is only visible on screens for which the user has associated rights.

1. Screen Rights Setup

The **Change Request** button can be enabled on the Screen Rights tab which can be found on the Screen Rights Template screen.

To update the proper screen rights template to allow users to have access to this feature:

1. Open the Screen Rights Template screen.
2. Select or create a template ID for the desired user group.
3. Ensure the user group's template ID has **View** and **Insert** rights checked for the Change Requests screen (Screen ID 2439).



2. Web Screen Rights Setup

Additional screen rights can be set to enable the change requests from web workflows in the Shop Activity portals.

Once the User Group has been given **View** and **Insert** rights for the Change Requests screen, the following rights must be set based on desired access:

For users to make parts change requests:

The user must have **View** and **Request change** rights checked for the Parts - Primary Information screen (Screen ID 2077).

For users to make vendor change requests:

The user must also have **View** and **Request change** rights checked for the Vendors Primary Information screen (Screen ID 2013).

The portal pages that use this feature for new IDs and Change Requests also use screen rights to control how a user can interact with the web pop-ins. Where available, the **Insert** checkbox will make the page viewable for a new insert and allow saving of the form. The **Update** checkbox will disable the **Save** button for this request.

This is currently available in the Storekeeper Portal Parts Definition pop-in, as an example:

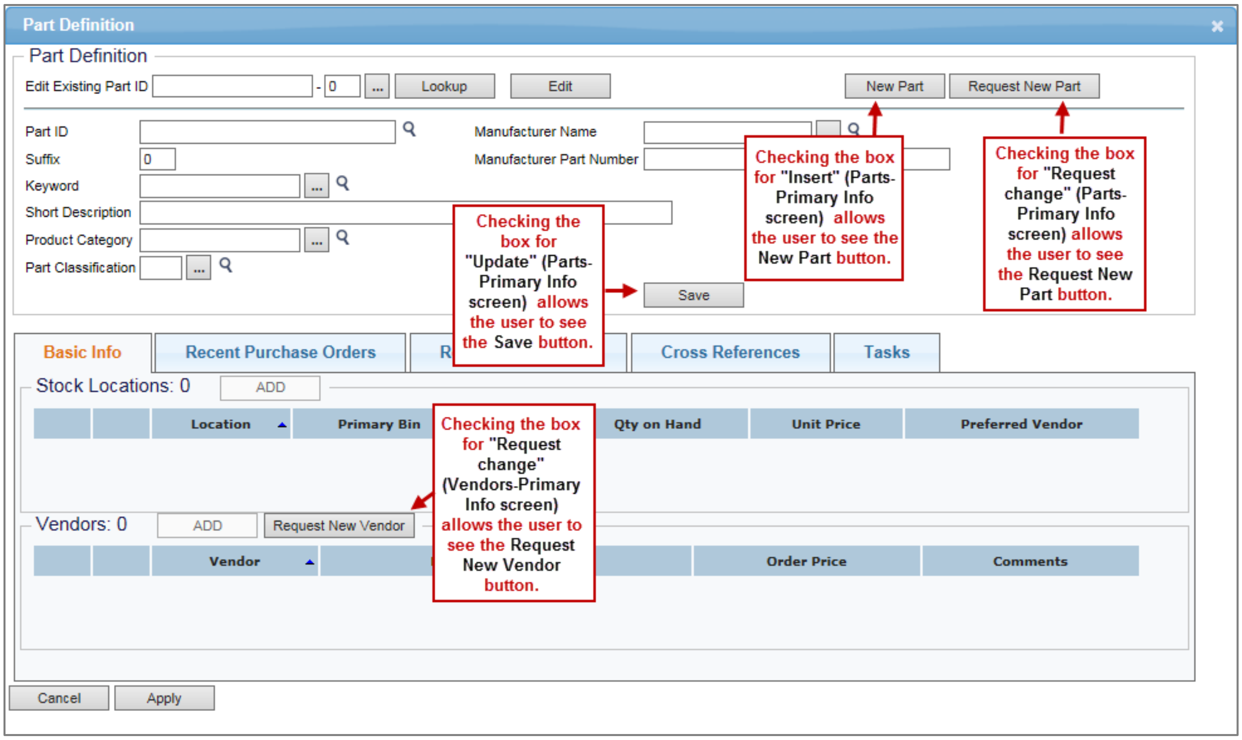
- For the definition pop-in screen rights:

  Vendors – Primary Information screen rights

  - Allow Change request (**Request Change**): Makes the **Request New Part** button visible

  Parts – Primary Information screen rights

  - Allow Insert (**Insert**): Makes the **New Part** button visible
  - Allow Edit (**Update**): Makes the **Save** button visible; otherwise locks fields
  - Allow Change request (**Request Change**): Makes the **Request New Part** button visible



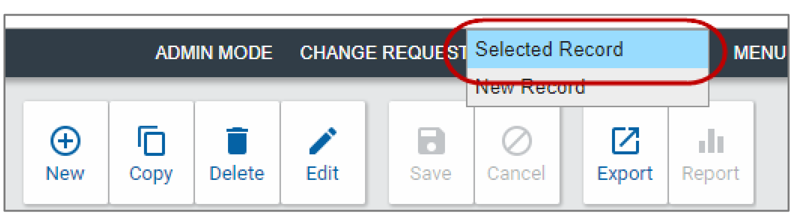
3. Requesting Edits

Click **Change Request** to enable the Selected Request edit mode.

You must have change request rights on the screen for the Change Request menu option to be shown.

Step One: Main Screen

1. Click the Change Request menu link.
2. Choose **Selected Record**. You must have a record selected to enable this option, otherwise this option is greyed out.



3. Enter the values that are being requested to edit, then click **Save**.

Step Two: Change Request Screen

The Change Request Enterprise Portal screen with the changed values displays after you click **Save**. This allows the user to update information and leave notes for their request.

Similarly, the Change Request screen can be used to view and apply changes directly using the **Open source screen** button. Saving a record with change request values loaded will update the change request record to the default completed status set on Change Request Status screen.

Validation Rules

Validation rules for the **Open source screen** button on the Change Request screen:

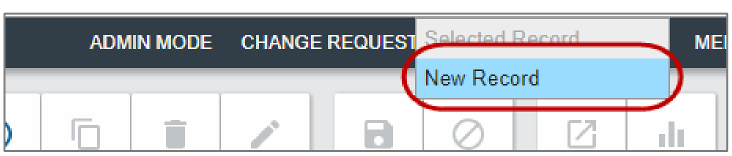
- If the user has view rights to the target screen of the Change Request record, this will unlock the **Open source screen** button.
- If the user has edit rights to the target screen, this will launch screen in UPDATE mode so they can make updates.
- If the user only has view rights to the source screen, this will launch the screen in VIEW only mode.
- If the user does not have view rights to the target screen of the Change Request record, they will not be able to use the **Open source screen** button.

4. Requesting New Records

Enterprise Portal can also be launched directly into a Change Request mode for a New Insert request record.

Step One: Main Screen

1. Click the **Change Request** menu link.
2. Click **New Record**.



3. Enter the values that are being requested to insert, then click **Save**.

Step Two: Change Request Screen

Clicking **Save** opens the **Change Request Enterprise Portal** screen with the inserted values loaded. This allows a user to update information and leave notes for their request.

Similarly, you can use the Change Request screen to view and apply changes directly using the **Open source screen** button. See the Requesting Edits section above for validation rules for the **Open source screen** button on the Change Requests screen.

Saving a record with change request values loaded will update the Change Request record to the default completed status set on Change Request Status screen.

A warning message will be shown if no default completed status is defined. The user must then update the Change Request status and apply the changes.

5. Change Request Gadget

Within the Shop Activity gadget-based portals, the Change Requests Gadget can be added to the page for response to Change Requests. The Change Request Gadget is available in the Shop Activity Storekeeper and Work Management portals. Please refer to the user guides for these portals for information on using the Change Request Gadget. The *Shop Activity Storekeeper User Guide* also includes steps to create change requests during the part request response workflow. For additional information, refer to the section, *Change Requests for New Parts/Vendors when Responding to Part Requests*.