2. Manage Purchase Orders – OLA LE Contracts

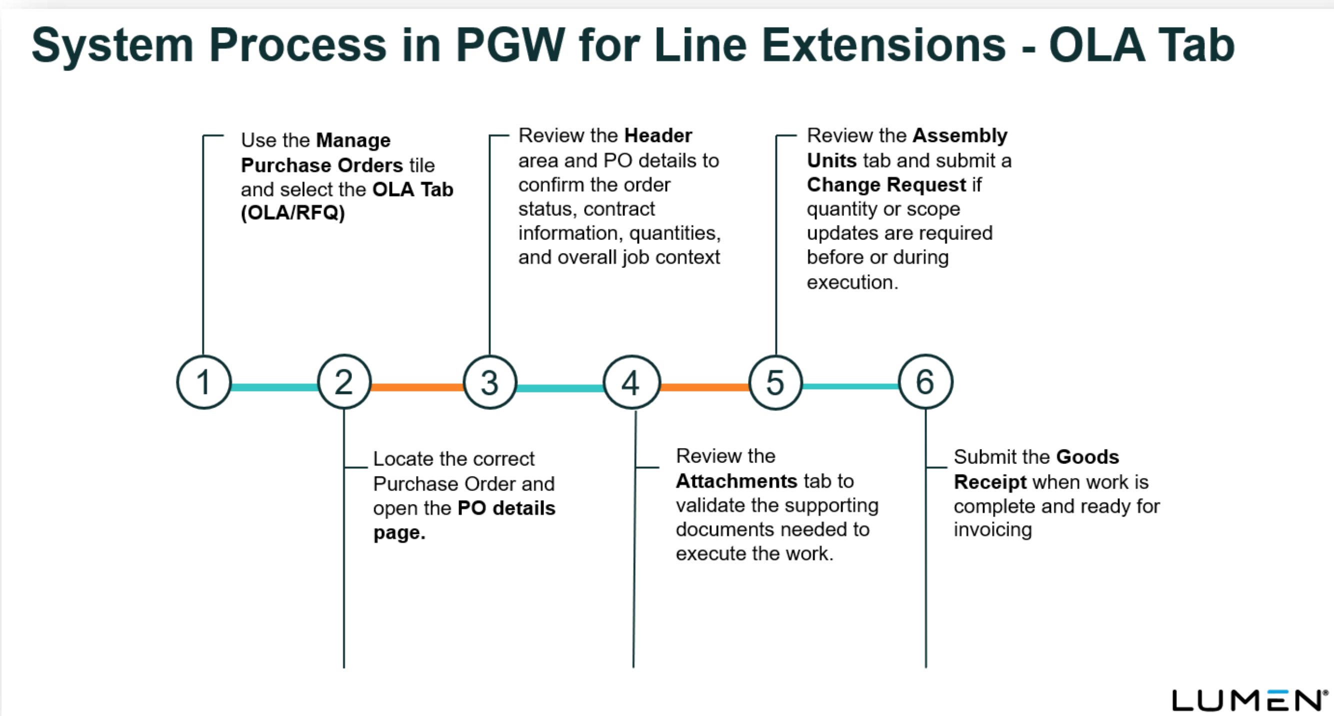
1. Module Overview

Welcome to PGW training for suppliers. This training is designed to help you navigate PGW confidently and complete your day-to-day work using the same screens and workflows you will use in production.

In this guide, you will learn how to manage your work from award to execution, starting with receiving a Purchase Order (PO), continuing through scope updates and progress tracking, and finishing with Goods Receipt (GR). You will also learn how to interpret key statuses, respond to workflow-driven approvals, and use PGW tools such as attachments, message notifications, and history tracking to keep your work accurate and traceable.

This training focuses on what you can do directly in PGW and explains the Lumen approval touchpoints that may impact your next step (for example, PO Change Request approvals, tolerance-based financial approvals, and invoice approvals or rejections).

Award → Execution



1.1 Glossary

Use this glossary as a quick reference while working in the Manage Purchase Orders (MPO) – OLA/RFQ tab for LE purchase orders. It defines the key PGW screens, fields, statuses, and process terms you will see during PO review, PO changes, Goods Receipt (GR), and traceability activities, so you can interpret the system's output and complete each step correctly.

PGW Applications and Page Areas

- **Manage Purchase Orders (MPO)**

Application used to search, open, and manage Purchase Orders (POs) in PGW, including LE POs in the OLA/RFQ tab.

- **OLA / RFQ Tab**

OLA (Outline Agreement) = LE construction
Contract-based purchasing arrangement with agreed pricing and terms. In LE OLA POs, suppliers request quantity or unit changes rather than price changes.

- **Filter Bar (Also refer to the Title Area of the Page)**

The filter area above the table is used to narrow results. Search results refresh when you select Go.

- **Title Area**

The upper section of the PO detail page displays key PO-level execution fields, including PO Status, Job Status, Due Date, and Estimated Completion Date.

- **Purchase Orders Table**

Results table on the MPO landing page that lists POs returned by your filter criteria, allowing you to open a PO to view its details and take action.

LE Purchasing and Scope Objects

- **Purchase Order (PO)**

Execution document created in SAP S/4HANA and delivered to PGW for you to review the scope, update progress, submit GRs, and submit invoices.

- **Assembly Units (AUs)**

From the PO details page, you review the Assembly Units (AUs) that define your awarded scope. These AUs are the work units used throughout the process:

  - They define the work that has been awarded and approved for execution.
  - They are the lines you use when submitting Goods Receipts (GR).

- **Items Pending**

Landing-page field used to identify POs that still require action (for example, pending updates or execution steps).

- **Supplier Received**

The mandatory landing-page filter is used to search for POs. You must keep a valid date range to run the search.

- **Due Date**

Target completion date used for schedule tracking. Certain job statuses can be automatically applied when the due date approaches or is missed.

- **Estimated Completion Date (Est. Completion)**

Date you maintain to communicate the expected completion timing for the work related to the PO.

Status Fields (PO vs Job)

- **PO Status**

PO-level status indicates the overall state of the purchase order and its change request lifecycle. In awarded OLA POs, there is no initial supplier confirmation step after PO creation.

- **Job Status**

Work-in-progress status is used to track execution progress once a PO is released.

- **Job Sub-Status (Reason Code)**

Additional detail (reason) that can be recorded for certain Job Statuses.

Change Request (CR) Terms

- **PO Change Request (CR)**

Request you submit a change to the PO scope in PGW. A CR must be approved before the PO is updated.

- **CR In Progress**

PO Status is displayed after a CR is submitted and while approvals are pending.

- **Tolerance / Tolerance Exceeded (EFAA Approval Required)**

Approval rule that may trigger financial approval when the change exceeds the allowed tolerance threshold.

- **Commitment Control Budget Check**

Budget sufficiency check performed before PR/PO updates proceed.

- **PR/PO sync:**

Is the system synchronization step that updates SAP purchasing documents after a change is approved in PGW. When Lumen approves a change request in PGW, the system sends the approved updates to SAP S/4HANA, so the related Purchase Requisition (PR) and Purchase Order (PO) reflect the same confirmed quantities and values. During this step, the line may show a syncing status (for example, approved (Syncing)) until the SAP update is complete and the line returns to Approved.

Goods Receipt

- **Goods Receipt (GR)**

Submission used to confirm completed work quantities at the AU line level.

- **Completed Qty**

AU-line quantity entered to record completed work.

- **Work Unit Completed**

Line-level completion indicator selected during GR (when applicable).

- **Work Complete Date**

Date entered when work is fully completed.

- **Partial GR / Final GR**

Multiple partial GRs may be submitted; the final GR closes out remaining completion quantities for the PO scope.

- **Under-Delivery**

The final GR comes to a lower quantity than the approved PO quantity. An automatic PR/PO update will occur to align quantities between the final GR, PR, and PO, without requiring Lumen approval for the reduction.

- **Reverse GR**

Action used to reverse a previously posted GR, typically to correct a work-completion issue tied to invoice processing.

Notifications and Traceability

- **Message Center**

Notification area on the PGW home page where you receive workflow messages (for example, “Changes approved” or invoice outcomes).

- **Timeline & Comments**

Area below the Assembly Units table on the Assembly Units tab, where change request comments and decisions are displayed.

- **History & Notes**

PO details page tab used to track changes, notes, and status-related activity for traceability.

- **Attachments Tab**

PO details page tab used to upload and store supporting files linked to the PO (including documentation supporting GR and invoicing).

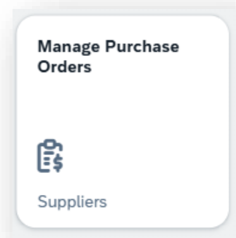
2. LE Construction "Manage Purchase Orders" Process Overview (OLA/RFQ Tab)

This process explains how LE construction work is executed in the OLA/RFQ workflow: review the PO scope, manage approved updates through the Change Request process, and confirm completed work through Goods Receipts.

At a high level, the process flows through these PGW Tile

- *Manage Purchase Orders (MPO)*

  Where you locate and execute your POs (review scope, submit change requests, update job status/estimated completion, submit GR, manage attachments, and view



3. System Process in PGW

3.1 Award → Execution Flow

3.1.1 PO is issued and appears in PGW (OLA/RFQ tab)

You receive an LE PO in PGW and access it from the Manage Purchase Orders (MPO) → OLA/RFQ tab. The PO header shows key execution fields, including Job Status, PO Status, Due Date, and Estimated Completion. When the PO is ready for execution, it displays:

- *PO Status = Units Approved / Ready for GR*

This indicates that the PO scope has been approved and that the PO is eligible for Goods Receipt submission (subject to line-level rules).

3.1.2 Review PO scope and Assembly Units (AUs)

From the PO details page, you review the Assembly Units (AUs) that define your authorized scope. AUs are the work units used throughout the process:

- They define what is approved to be performed.
- They are the lines you complete and confirm when submitting Goods Receipts (GR).
- They are the lines affected when submitting a Change Request.

3.1.3 Submit a Change Request when the scope needs to change (AUs or quantities)

If scope changes are required during execution, you submit a PO Change Request from the PO to:

- Add net new AUs,
- Remove AUs (reduce quantity to 0), or increase/decrease AU quantities.

Once submitted:

- *PO Status = CR In Progress*

The PO can contain a mix of item-level statuses (some lines may be pending with you, others pending with Lumen). GR is allowed only for items not included in the Change Request, while the PO is in CR In Progress. Your request is reviewed through confirmation and approval steps, which may include:

- Lumen Responsible Person confirming changes to units (Unit Confirmation),
- Procurement Contact confirming pricing (if required), and EFAA financial approval (if required by tolerance).
- When approvals are complete, and PR/PO sync finishes: The PO returns to

- *PO Status = Units Approved / Ready for GR*

And you proceed with execution on the updated scope.

3.1.4 Track progress using Job Status and Estimated Completion (work-in-progress updates)

As you perform work, you update the Job Status (and, optionally, Estimated Completion) in the PO header. Updates require a note and are recorded in History & Notes for traceability.

Certain job statuses can be applied automatically based on the due date (for example, if the due date is missing and the work is not complete).

3.1.5 Submit Goods Receipts (GR) for completed work

When work is completed for one or more AUs, you submit a Goods Receipt (GR) from MPO by entering:

- Completed quantities per AU line,
- Completion indicators (when applicable),
- Comments (per submission), and
- Work Complete Date when fully completed.
- GR supports multiple partial submissions as work progresses. GR is the confirmation step that supports billing.

4. Before starting, review these key concepts used on LE Purchase Orders in PGW: Labor PO, Material PO, Assembly Units, and PDF.

4.1 Manage Purchase Orders (MPO Tile): Your Labor PO (Execution PO)

When you work in Manage Purchase Orders (MPO) → OLA/RFQ, you are working on the supplier execution PO (often referred to as the Labor PO). This is the PO you use to perform day-to-day execution activities in PGW, such as:

- Reviewing the PO scope in the **Assembly Units** tab
- Submitting **PO Change Requests** (scope/quantity changes)
- Submitting **Goods Receipts (GR)** for completed work
- Maintaining supporting documentation through **Attachments**
- Reviewing traceability in **History & Notes**

This PO represents the portion of the work you execute and confirm through PGW.

4.2 View Material Purchase Orders Tile: A Separate PO Used to Track Lumen-Supplied Materials

In some jobs, Lumen supplies the **major/vendor material** and/or **minor material** directly. In those cases, Lumen creates a separate **Material PO** in **SAP S/4HANA** to manage material procurement, shipping, and receiving. In PGW, this is available through the **View Lumen Material POs** tile. Use this tile to view and track the Material PO document that represents the materials Lumen is supplying

Key Point:

The Labor PO in MPO and the Lumen Material PO are not the same document. They are two different POs that support the same job.

Note: View Material Purchase Orders is a separate Tile and is covered in ***Module 7. View Material Purchase Orders***

4.3 Why Lumen-Supplied Materials Still Appear in Assembly Units

The **Assembly Unit (AU)** represents the full work package, or **scope container**, for the job. An AU can include multiple component types, including labor and different material components, because it is meant to describe what the job consists of.

That means the AU can show cost components such as:

- Vendor/Major material (VM)
- Minor material (MM)
- Labor (L)
- Locally purchased (LP)

Even when Lumen supplies the vendor/major material and tracks it on a separate Material PO, the AU can still display it because it is part of the job's scope and pricing composition.

Think of it this way:

- **Assembly Units tab** = what the job includes, including scope and component breakdown
- **View Lumen Material POs tile** = how Lumen-supplied materials are tracked operationally

4.4 PDF Download What It Represents

When you select the PDF icon on the PO Details page, PGW downloads a PDF copy of the PO document you are viewing.

This PDF is a document output for review/sharing/printing. It is not the same thing as the Assembly Units tab, which is the execution workspace where you manage scope changes and monitor item statuses.

Note: The PDF copy of the PO only shows fully approved units and quantities. It does not show new units or quantities still within the change request process. It will always match the units and quantities that you see on the Goods Receipt tab, as these are fully approved and ready for GR.

- *Summary (Quick Reference)*

  - MPO (OLA/RFQ) → your awarded RFQ execution PO used for scope review, change requests, and Goods Receipts

  - View Lumen Material POs → separate tile used to track Lumen-supplied material when applicable, related to your execution PO

  - Assembly Units → the scope container showing what the job includes and how the awarded work is structured

  - PDF icon → opens downloadable PO document copy, not the same as the execution workspace

5. Job Status and Job Sub-Status – OLA/RFQ Labels

Below are the Job Status values you may see on Service Drop POs, along with the exact sub-status labels available for OLA where applicable. If the Sub-status is shown as "N/A", no Sub-status options exist for that Job Status combination.

Each time you update the Job Status, you will be asked to provide a note. This note is displayed in the History & Notes tab along with the Job Status update event. You can use the note to provide Lumen with additional information.

- *Job Status: Supplier Received*
  - **What it means:** Default status when the PO is released to you and everything is progressing normally.
  - Sub-status: N/A

- *Job Status: On Hold*
  - **What it means:** PO is on hold.
  - **Restriction:** You are not allowed to submit **GRs** or **CRs** while in this status.
  - Sub-status: N/A

- *Job Status: At Risk (system-driven)*
  - **What it means**: This status is used to draw attention to jobs that are due soon.
  - **When it happens**: Automatically applied by the system 2 business days before the Due Date if the job is not completed or canceled.
  - **Key rule**: The system will not provide a sub-status with the automatic job status update, but you may select a sub-status to indicate the reason that the job is at risk.
  - Sub-status options (LE):
    - [Blank] (only when set automatically by the system and you have not yet provided a reason)
    - Customer No Access
    - Frozen Ground
    - Customer Reschedule
    - Invalid CBR #
    - LE Resource Constraint
    - Invalid Address
    - Local Ordinance
    - Locate
    - Materials
    - Missing / Incorrect Address
    - Neighbor No Access
    - Permit
    - Scope Change
    - Sketch Issues
    - Unit Approval
    - Weather Delay
    - Wrong Drop Type
    - Wrong Footage
    - Other

- *Job Status: Missed Due Date (system-driven)*
  - **What it means**: This status is used to draw attention to jobs that are past due.
  - **When it happens**: Automatically applied by the system when the due date has passed and the job is not complete or canceled.
  - **Key rule:** The system will not provide a sub-status with the automatic job status update, but you may select a sub-status to indicate the reason that the job is past due.
  - Sub-status options (LE):
    - [Blank] - only when set automatically by the system
    - Customer No Access
    - Frozen Ground
    - Customer Reschedule
    - Invalid CBR #
    - LE Resource Constraint
    - Invalid Address
    - Local Ordinance
    - Locate
    - Materials
    - Missing / Incorrect Address
    - Neighbor No Access
    - Permit
    - Scope Change
    - Sketch Issues
    - Unit Approval
    - Weather Delay
    - Wrong Drop Type
    - Wrong Footage
    - Other

- *Job Status: Canceled by Supplier*
  - **What it means:** You cancel the job directly.
  - Sub-status: N/A

"For the full cancellation workflow and billing rules, see PO Cancellation - Deep Dive."

- *Job Status: Cancellation Requested*
  - **What it means:** Lumen has requested cancellation, and you need to review and respond through the cancellation workflow.
  - Sub-status: N/A

- *Job Status: Cancellation Confirmed*
  - **What it means:** You have confirmed Lumen's request to cancel the job and have indicated the planned billing for the job, depending on if work had been started.
  - **Sub-status** options (SD):
    - No Billing
    - Partial Billing

"For step-by-step actions and outcomes, see PO Cancellation - Deep Dive."

- *Job Status: Supplier Completed*
  - **What it means:** Used when your LE work is complete (completion status for LE).

PO Cancellation - Deep Dive (Job Status Cancellation Sub-Process)

Using the cancellation process when the job is tied to the PO should not continue. Cancellation is controlled through Job Status updates and applies to Service Drop POs. The flow supports both supplier-initiated and Lumen-initiated cancellations, with different rules and outcomes.

Note that this does not delete the PO; follow-up with the Lumen Supervisor will be needed on a case-by-case basis to fully close out the PO. The cancellation job statuses described in this section are a quick way to communicate and disposition jobs, but they should not be considered final.

- *When and why cancellation happens*

Cancellation may happen when the work should stop before completion, for example, when the job is no longer needed, the requirements change, or the work cannot continue.

- You can cancel directly in some cases.
- You may also be asked to respond when Lumen requests cancellation, including whether billing is expected.

- *Rules that apply to all cancellations*
  - You can set Job Status = Canceled by Supplier directly without approval from Lumen.
  - When Lumen requests cancellation, your response drives the billing outcome.
  - Cancellation can be reversed by Lumen if the job was canceled accidentally by updating the status back to Supplier Received.
  - Cancellation is not allowed when:
    - Job Status = Supplier Completed, or
    - Job Status = Install Completed, or
    - PO Status = Closed.
  - If cancellation is not allowed:
    - The system displays an error showing that the job cannot be canceled because execution is already complete or the PO is closed, and no update proceeds.

- *Supplier-Initiated Cancellation*
  - What do you do:
    - Open the PO in MPO - Service Drops.
    - Update Job Status to Canceled by Supplier.
  - Outcome:
    - The cancellation status is applied immediately.
  - Key point:
    - Lumen approval is not required for supplier-initiated cancellation.

- *Lumen-Initiated Cancellation (you respond to a cancellation request)*
  - Lumen requests cancellation: Lumen sets Job Status = Cancellation Requested. This starts the cancellation review process.
  - You review the cancellation request
    - Open the PO and review the cancellation request details.
    - Then continue through the decision points below.
  - Decision: Agree to cancel? (Supplier response to a Lumen request)

- When Lumen initiates cancellation, the PO is set to Job Status = Cancellation Requested. You then decide whether to accept or reject the request. You are responding to Lumen's request – you are not cancelling the PO yourself in this step.
- If you disagree (reject the cancellation):
  - Update Job Status = Cancellation Rejected.
  - Continue with the standard execution process. The PO is not cancelled.
- If you agree:
  - Continue to the next decision: Work already underway?
  - If work is not underway, cancellation proceeds as No Billing and ends.
  - If work is already underway, cancellation proceeds as Partial Billing, and you submit GR for the work completed to date.

- *Rules for "Cancellation Confirmed - No Billing."*
  - Billing is NOT allowed in this status.
  - You cannot make changes to the PO in this status, nor submit Goods Receipts.

- *Rules for "Cancellation Confirmed - Partial Billing."*
  - Use this when work is already underway. Billing is allowed in this status.
  - You may submit Goods Receipts to jobs in this status.

You must submit the GR for work completed to date. Then:
- Submit completed AUs for work performed using Goods Receipt (GR).
- Continue with the standard unit confirmation and invoicing process to bill only for completed work.

Summary of cancellation outcomes (what you will see)

- Cancelled by Supplier → you cancel directly; process ends.
- Cancellation Requested →Lumen requests cancellation; you must review.
- Cancellation Confirmed - No Billing → cancellation accepted, no billing allowed; the PO becomes non-actionable for changes.
- Cancellation Confirmed - Partial Billing → cancellation accepted, billing allowed for completed work only; submit GR to date and continue to invoice.
- Cancellation Rejected → cancellation not accepted; continue the standard process.
- Cancellation not allowed → the job is already complete, or the PO is closed, so cancellation cannot proceed.

7. PO Status Overview (LE – OLA/RFQ POs)

Use PO Status to understand the overall state of your PO at the header level. PO Status appears on the MPO landing page and in the PO Details Title Area, and it is derived from the status of the PO items (line items).

Key rules

- PO Status is a header-level field driven by the item (line) states.
- PO Status is different from Job Status:
    - Job Status = work-in-progress tracking (execution updates).
    - PO Status = change request/readiness/closure state for the PO.

- The PO can contain a mix of item statuses even when the PO Status is the same (for example, CR In Progress can include items pending with you, pending with Lumen, syncing, and already approved).

7.1 PO Status Values and What They Mean

- *PO Status: Units Approved / Ready for GR*

You see Units Approved/Ready for GR when PR/PO synchronization is complete for all items, and all required approvals are in place.

- What it means
    - The PO is waiting for your first response.
- What you can do
    - Review the PO, confirm the scope as-is, or submit the initial change request.
- What you cannot do
    - Goods Receipts are not allowed.

- *PO Status: CR In Progress*

You see CR In Progress after a Change Request is submitted, and not all items are in Approved status.

- What it means
    - The PO is actively moving through the Change Request workflow.
    - Item lines may be in different states (pending with you, pending with Lumen approvals, budget error, EFAA rejected, syncing, etc.).
- What you can do
    - GR is allowed only for items not included in the Change Request (or items not syncing), while the PO remains in CR In Progress.
- What happens next
    - The Change Request progresses through approvals and synchronization (unit confirmation, financial approval if required, PR/PO sync).
    - When the change cycle is completed, the PO returns to Units Approved / Ready for GR.

- *PO Status: Closed*

You see 'Closed' when all items are marked 'delivery complete,' ' final invoice,' and 'blocked'.

- What it means
    - The PO is complete and cannot be used for receiving.
- What you cannot do

- GRs are not allowed.

7.2 Simplified PO Status Flow (LE – RFQ & OLA)

Use this flow to interpret how PO Status changes during a Change Request:

1. Units Approved / Ready for GR
2. If PO changes are required → submit a Change Request → CR In Progress
3. Lumen confirms changes (and pricing confirmation may apply if required) → PO remains CR In Progress
4. Financial approval may occur (EFAA, if required) → PO remains CR In Progress
5. After approvals and PR/PO sync complete → PO returns to Units Approved / Ready for GR

7.3 What You Should Do When You See Each PO Status

- If **Units Approved / Ready for GR:** proceed with execution activities, including GR submission (as applicable).
- If **CR In Progress**: check item-level statuses and complete your pending actions (if any). Only submit GR for items not included in the change request.
- If **Closed**: do not attempt GR; the PO is complete.

8. How to Access Purchase Orders

As you begin working on your LE Purchase Orders in PGW, you will typically receive notifications in the Message Center. If you have already configured your Message Center settings, you may receive an email notification when an MPO-related event occurs. When you log in to PGW, you will also see the same notification in the Message Center.

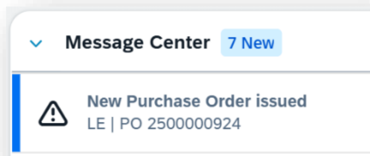
You can open Manage Purchase Orders (MPO) – OLA/RFQ in three ways. All three options access the same process, but they differ in whether you start from a worklist, a specific notification, or the full PO list.

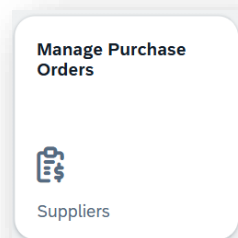
- *Open from the Action Center Tile*

  Use this option to start from a **worklist view** focused on items that require action.

- *Open directly from the Message Center notification*

  Use this option to open MPO from a **specific notification**, so you can respond to the event that triggered the message





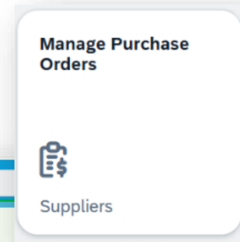
- *Open from the Manage Purchase Orders Tile*

  Use this option to access the **complete list of POs** assigned to you in the OLA/RFQ tab and search using filters

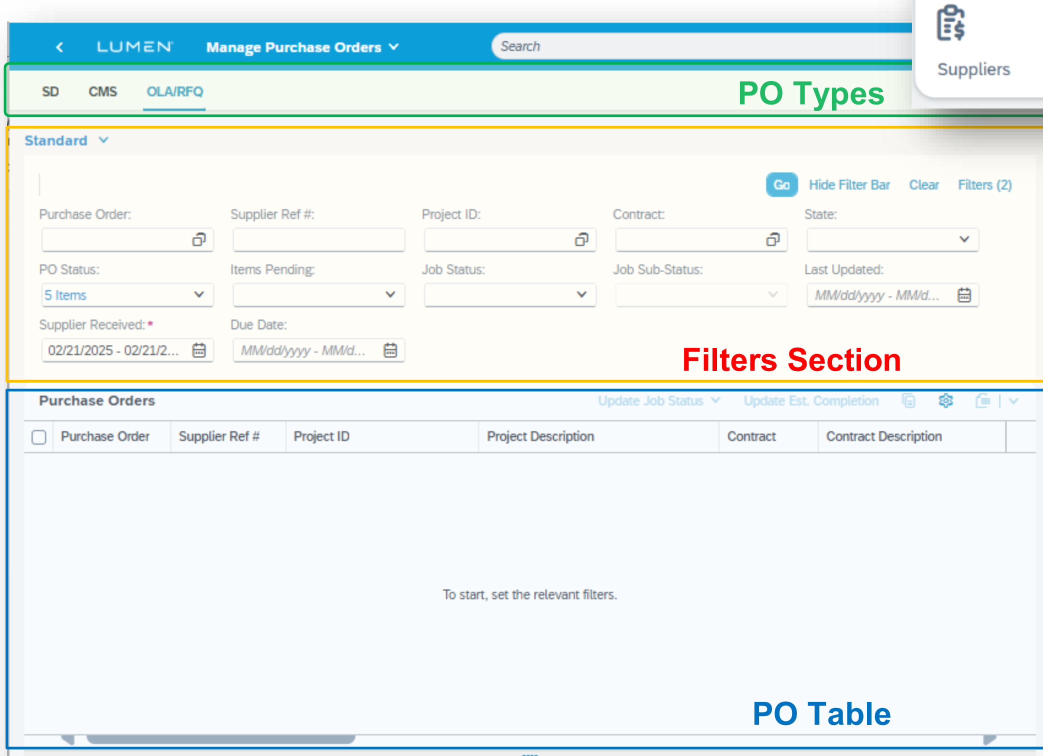
For this training, you will launch MPO from the Manage Purchase Orders Tile so you can access the full list of POs assigned to you in the OLA/RFQ tab. The navigation and process options are the same regardless of whether you open MPO from the Action Center, Message Center, or the Manage Purchase Orders Tile.

9. Manage Purchase Orders (MPO Tile) – OLA/RFQ Tab, Landing Page

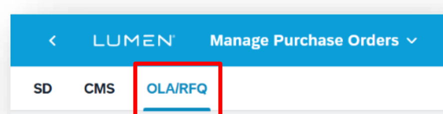
- *Click the Manage Purchase Order Tile*



The Manage Purchase Order landing Page is displayed



The **OLA/RFQ** tab is displayed by default. Confirm the **blue underline** is shown under the tab name.

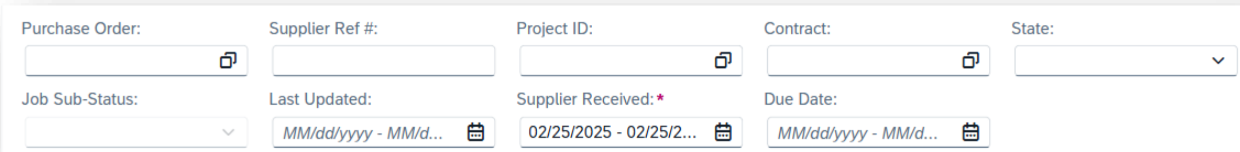


9.1 Filter Section

- ➢ Enter search criteria in the Filter Section

At the top section of the Manage Purchase Orders page, the “Title area” contains the standard filter options. These determine which Purchase Orders are displayed in the results below.

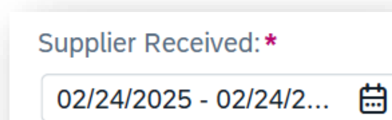
- ➢ To narrow the results, apply a filter (e.g., PO Number, Supplier, or Status), then **click Go** at the top right of the filter section.



The following filters are available from the standard view:

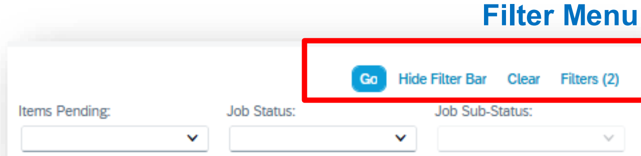
- Supplier Ref #
- Project ID
- Contract
- State
- PO Status (defaulted to exclude Closed POs)
- Items Pending
- Job Status
- Job Sub-Status
- Last Updated
- Supplier Received* (mandatory)
- Due Date

Supplier Received is a mandatory filter and defaults to the last 12 months. The date range can be adjusted as needed.



- ➢ To remove the current filter criteria, **click Clear** in the filter menu.

Filter Menu



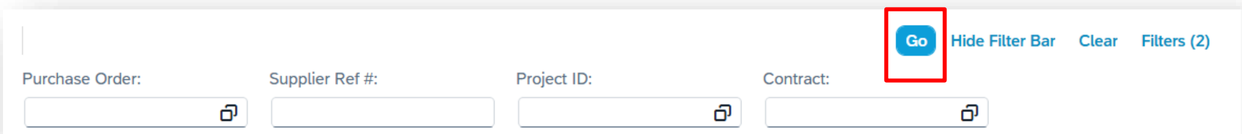
The filters reset, allowing you to perform a new search.

Note: To adjust the filters, locate the Filter menu at the top-right area of the screen and click Filters. A pop-up window appears showing all available filters. Filters already included in the standard view are pre-checked.

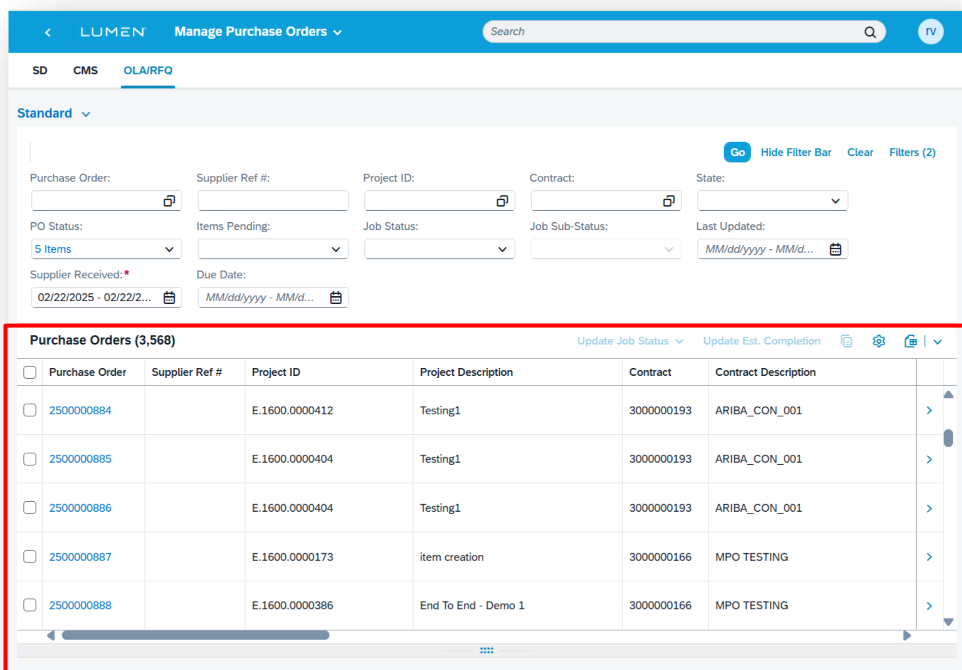
Check or uncheck additional filters as desired, then click Go at the bottom of the pop-up to refresh the table with the updated results

- ➢ To display all purchase orders assigned to your company, **click Go** in the top-right corner of the filters section.

This step relates to the Filter menu section. For complete instructions, refer to: Module 1. Getting Started in PGW: Overview, Login, Preferences, and Navigation. Section: 8.1 Filter Section and Menu (how to return the right records), Page 22



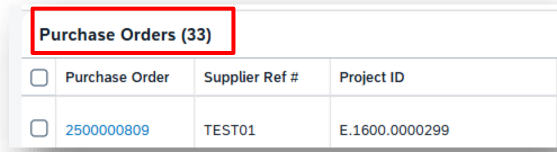
After you select Go, the Purchase Orders table is populated with the POs assigned to your company. Use the columns below to identify the correct PO and understand what action is pending before you open it.



- ➢ Review the columns displayed in the Purchase Orders table

On the Manage Purchase Orders landing page, the Purchase Orders table is located directly below the Filter section.

The total number of purchase orders currently displayed appears in the table header (e.g., “Purchase Orders”



9.2 Column Section

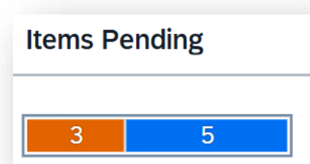
Each row provides key information that helps the supplier quickly identify work in progress and locate specific purchase orders for review.

The following columns are included in the standard table variant:

- Purchase Order
- Supplier Ref #
- Project ID
- Project Description
- Contract
- Contract Description
- State
- Exchange
- Items Pending
- PO Status
- Job Status
- Job Sub-Status
- Responsible Person
- Last Updated
- Supplier Received
- Due Date
- Est. Completion
- Act Work Complete

Items Pending displays a mini-stacked bar chart summarizing PO line items requiring action. The chart visually separates:

- **Pending with Supplier** (items requiring your action)
- **Pending with Lumen** (items waiting on Lumen approvals/actions)



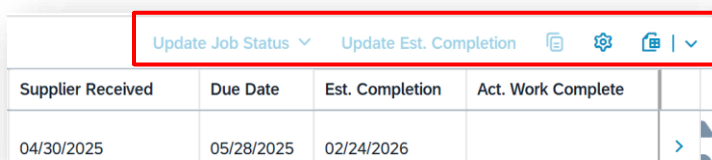
- ➢ Additional optional columns can be added**. Click the Settings (gear) icon** in the top-right corner of the table.

A pop-up window appears displaying all available columns. The columns in the standard view have already been checked. Check or uncheck columns as needed to customize how the table is displayed, then press Go at the bottom of the pop-up.

9.3 How to use the Table

- Use Purchase Order, Supplier Ref #, and Project ID to confirm that you are selecting the correct PO.
- Use Items Pending to quickly understand whether action is pending with you or with Lumen before you open the PO.
- Review the PO Status to confirm whether the PO is in a change request cycle (CR In Progress) or ready for GR.
- Review Job Status / Job Sub-Status, Due Date, Est. Completion, and Act. Work Complete: Briefly review execution progress.

Columns Menu

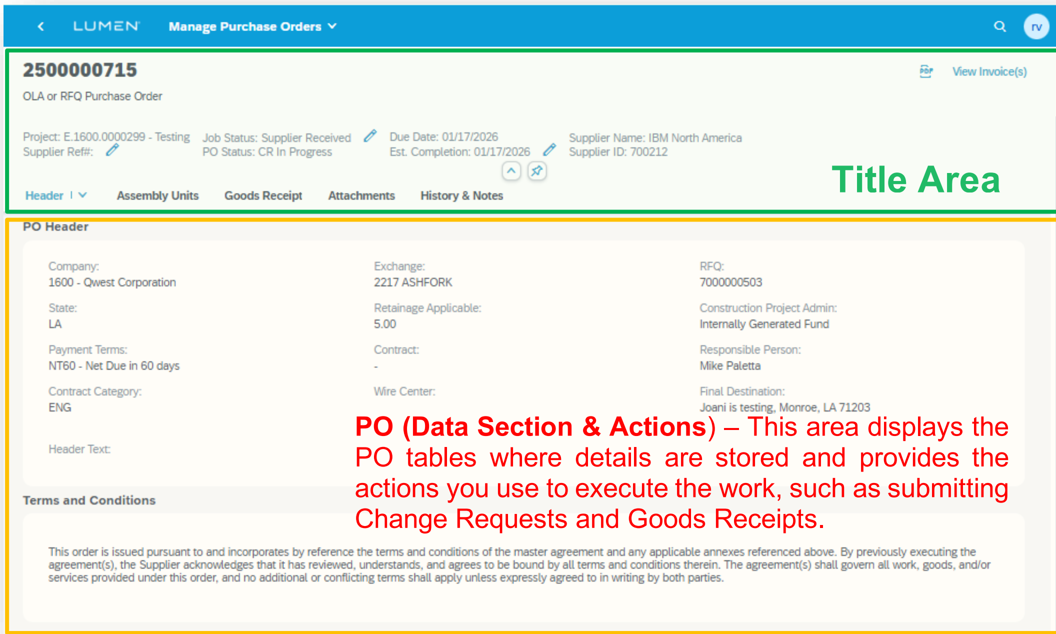


- ➢ Click the PO number hyperlink or the arrow at the end of the row to open the Purchase Order.

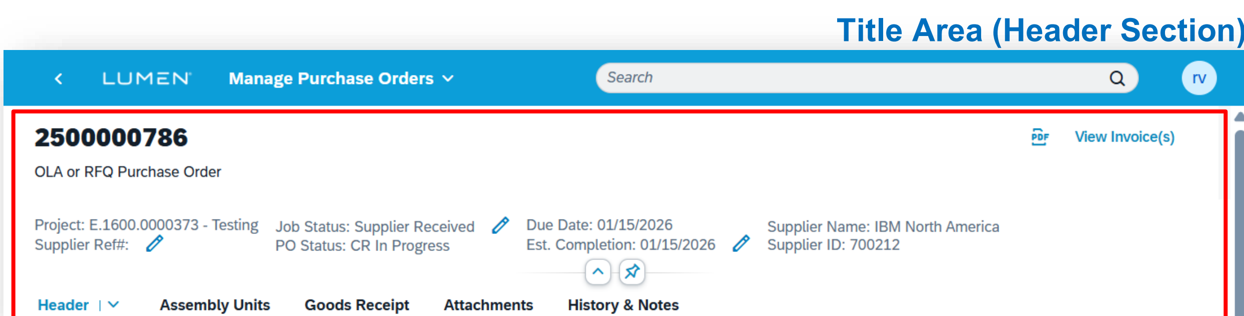
After you select a PO from the table, PGW opens the PO Details page for that purchase order, displaying the PO header information and the available tabs you will use to execute the work (such as Assembly Units, Goods Receipt, Attachments, and History & Notes).

This step relates to the Columns menu section. For complete instructions, refer to: Module 1. Getting Started in PGW: Overview, Login, Preferences, and Navigation. Section: 8.1.3 Table Controls (search, sort, refresh, columns, export)

10. Manage Purchase Orders (MPO) – PO Details Page – Title Area (Header Section)



After you open a PO from the MPO table, PGW displays the PO Details page. The top section of the page is the Title Area (header). This area provides a quick summary of the PO and includes a few supplier-editable fields (indicated by the blue pencil icon).



10.1 Fields displayed in the Title Area

- **Purchase Order Number** (example: 2500000786)
- **PO Type label**: OLA or RFQ Purchase Order
- **Project** (Project ID + description)
- **Supplier Ref#** (editable – blue pencil)
- **Job Status** (editable – blue pencil)
- **PO Status** (display only)
- **Due Date** (display only)
- **Est. Completion** (editable – blue pencil)
- **Supplier Name** *(display only)*
- **Supplier ID** (display only)
- **Menu Bar** At the bottom of the Title Area, a tab menu is displayed. Each tab opens a different section of the PO where you complete specific activities during execution. Use Assembly Units to review scope and submit Change Requests when AUs or quantities must be updated. Use Goods Receipt to record completed work quantities for AUs and submit GRs. Use Attachments to view and upload supporting documents linked to the PO. Use History & Notes to review the audit trail of updates, including status changes and the notes entered during updates.

10.2 Why are some fields editable?

You can edit specific fields in the Title Area to support execution tracking and coordination:

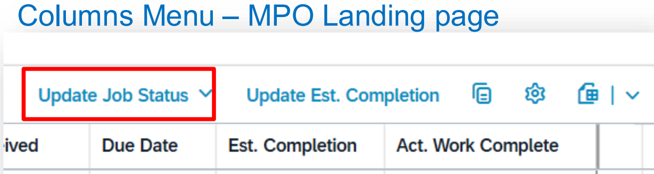
- **Job Status**: provide work-in-progress status updates during execution so Lumen can track progress and understand what is happening in the job.
- **Est. Completion**: Communicate updated completion timing when dates shift during execution.
- **Supplier Ref#**: Maintain your internal reference number for the PO so your team can match the PO to your internal job/work tracking.

All other Title Area fields are display-only because they are controlled by the underlying PO-creation, approval, and system-status logic.

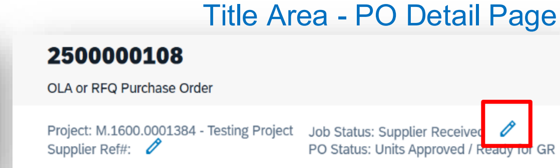
10.3 Update Job Status Overview

Use Job Status to provide work-in-progress updates on your PO as you execute the work. Job Status can be maintained from the MPO landing page via the column menu or in the PO Details Title Area and is visible on both the MPO landing page and the PO header, so Lumen can track progress and understand when items are delayed, on hold, canceled, or completed.

Columns Menu – MPO Landing page



Title Area - PO Detail Page



11. Job Status (LE – OLA/RFQ POs)

Use **Job Status** to keep your LE PO execution progress visible and traceable after the PO is released to you. Job Status provides work-in-progress updates between you and Lumen, and **Job Sub-Status** provides the reasons and details behind specific statuses

Every time you update Job Status, you are required to enter a note, and that note is recorded in History & Notes.

- *Key rules*
  - You (and Lumen) can update Job Status for your POs.
  - You can also update the Estimated Completion Date to provide updated timing during execution.
  - PO Status is a separate field and is primarily used to track the Change Request lifecycle.
  - Job Sub-Status options are configurable, and only valid combinations are available for selection.

- *When the system updates Job Status automatically*

Some Job Status values are applied automatically based on the PO schedule:
  - **At Risk** is automatically applied when the due date is 2 working days away, and the job is not complete.
  - **Missed Due** Date is automatically applied when the due date is in the past, and the job is not complete.
  - When the system automatically sets At Risk or Missed Due Date, the Sub-Status may initially be blank. That blank value is system-only and indicates that the system applied the status before a reason was provided.

- *What you must do when an At Risk or Due-Date status is applied*

When you see At Risk or Missed Due Date, update the Job Sub-Status to record the reason for the delay. This is used for reporting and traceability.

- *Completion path (LE)*

As work progresses, you continue updating Job Status as needed until the work is complete:
  - For LE, the completion status is Supplier Completed.
  - After completion, you proceed to submit Goods Receipts (GR) for completed Assembly Units (AUs) and then submit your invoice.

- *Cancellation statuses (LE)*

Cancellation can be initiated by you or requested by Lumen:
  - **Cancelled by Supplier**: You can cancel directly without approval from Lumen.
  - **Cancellation Requested**: A cancellation request is raised and routed through the cancellation sub-process.
  - **Cancellation Confirmed**: if cancellation is confirmed, the sub-status determines billing behavior:

- No Billing
- Partial Billing

If cancellation is confirmed as Partial Billing, you submit a GR for work completed to date and continue with standard invoicing steps. If cancellation is confirmed as No Billing, no further changes or GRs are allowed.

- *Why Job Status matters*

Job Status updates support:

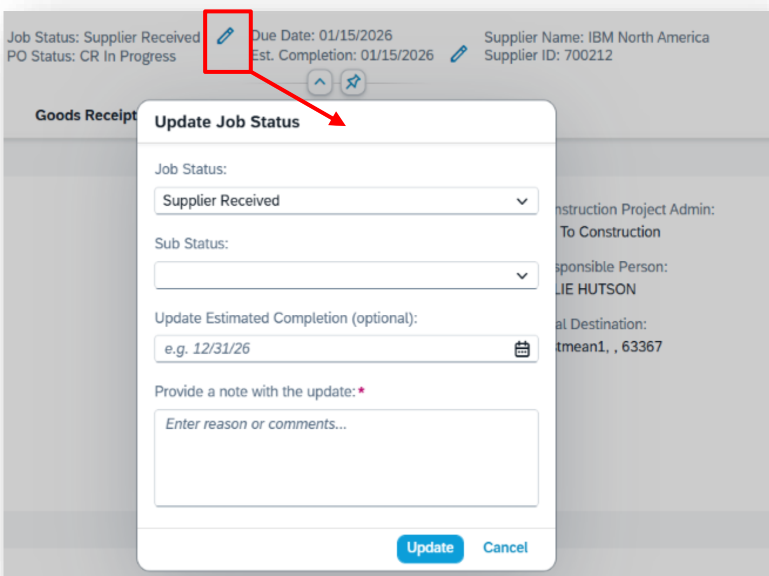
- Daily execution visibility between you and Lumen
- Schedule risk tracking (At Risk / Missed Due Date)
- Controlled closeout progression (Supplier Completed → GR → Invoice)
- Consistent reporting and exception tracking (including delay reason codes and cancellation outcomes)

SCENARIO: A JOB HAS BEEN ASSIGNED. THE SCOPE HAS BEEN REVIEWED, AND WORK IS READY TO PROCEED, BUT THE CUSTOMER CANNOT BE CONTACTED, SO THE JOB CANNOT BE STARTED.

11.1 Update Job Status (and Estimated Completion) from the PO Detail Page

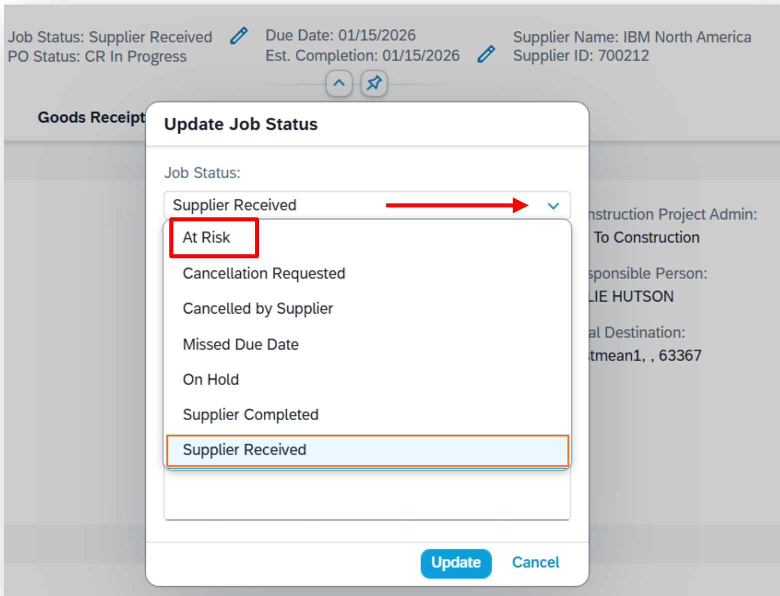
- In the PO Details Title Area, select the blue pencil next to Job Status.

The system opens the Update Job Status window.



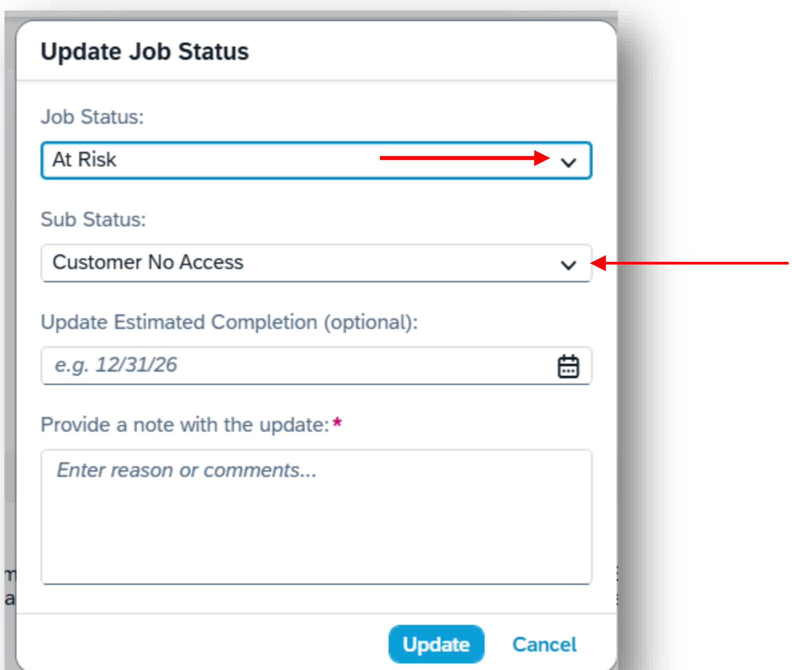
- Use the **Job Status dropdown** to select the appropriate status for the current stage of work.

Only the statuses available for your PO and role are displayed in the list.



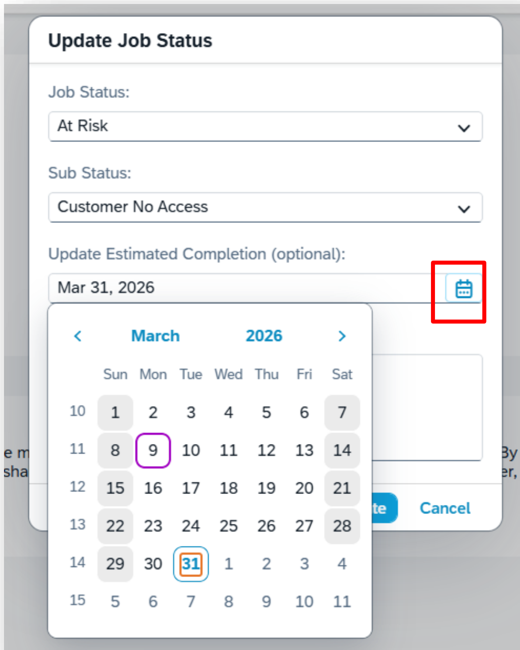
- **Sub Status (when applicable),** If the selected Job Status supports a sub-status (reason code).

➢ Use the **Sub Status dropdown** to select the reason.



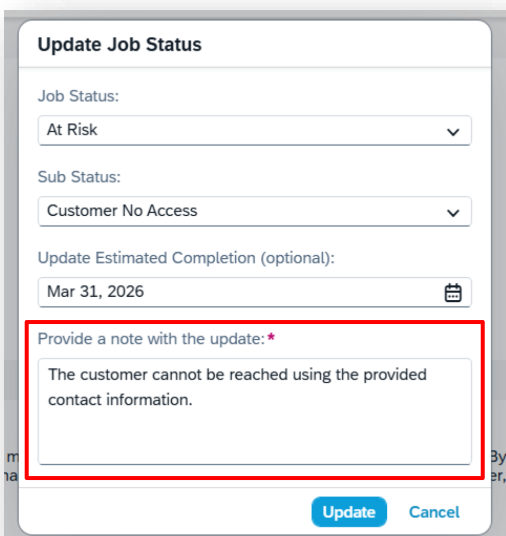
- **Update Estimated Completion (optional).** Even though Estimated Completion is not a Job Status, you can update it from this same window using Update Estimated Completion (optional).

➢ Select the **Calendar Icon** to choose a new date. This lets you communicate updated timing while you are updating Job Status.



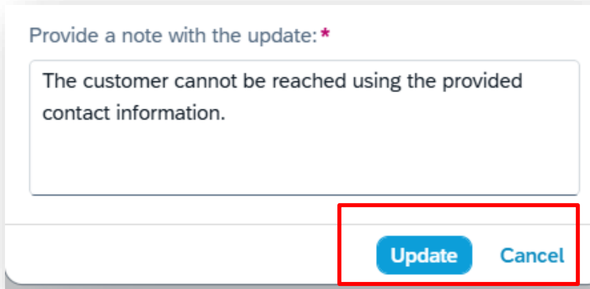
➢ Provide a note with the update (mandatory)

A note is required whenever you update the Job Status. In the Provide a note with the update field, enter the reason or context for the change. This note supports traceability and is recorded with the status update event.



- ➢ Save or Exit

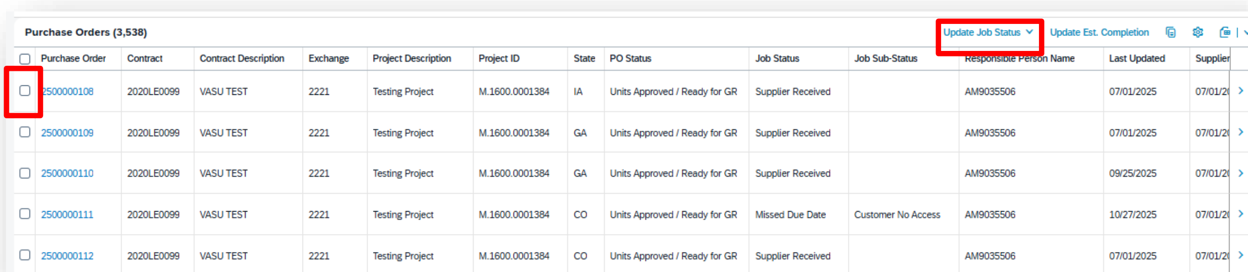
- Select **Update** to apply the changes.
- Select **Cancel** to exit without saving.



11.2 Update Job Status from the MPO Landing Page – How the Process Works

- ➢ From the MPO landing page, locate the Purchase Order to be updated and select the checkbox at the beginning of the row

The Job Status button in the top-right area of the Purchase Order table becomes active.



Purchase Order	Contract	Contract Description	Exchange	Project Description	Project ID	State	PO Status	Job Status	Job Sub-Status	Responsible Person Name	Last Updated	Supplier
2500000108	2020LE0099	VASU TEST	2221	Testing Project	M.1600.0001384	IA	Units Approved / Ready for GR	Supplier Received		AM9035506	07/01/2025	07/01/2
2500000109	2020LE0099	VASU TEST	2221	Testing Project	M.1600.0001384	GA	Units Approved / Ready for GR	Supplier Received		AM9035506	07/01/2025	07/01/2
2500000110	2020LE0099	VASU TEST	2221	Testing Project	M.1600.0001384	GA	Units Approved / Ready for GR	Supplier Received		AM9035506	09/25/2025	07/01/2
2500000111	2020LE0099	VASU TEST	2221	Testing Project	M.1600.0001384	CO	Units Approved / Ready for GR	Missed Due Date	Customer No Access	AM9035506	10/27/2025	07/01/2
2500000112	2020LE0099	VASU TEST	2221	Testing Project	M.1600.0001384	CO	Units Approved / Ready for GR	Supplier Received		AM9035506	07/01/2025	07/01/2

Note: This step is used to **Bulk update Job Status** for multiple purchase orders. It applies only when working with multiple POs.

- ➢ On the Manage Purchase Orders landing page, select multiple POs by checking the boxes at the beginning of each row.

The Update Job Status button becomes active. Click the button to open the Update Job Status window. Use the dropdown to select the new Job Status. If a Sub-Status is available, the field becomes editable and selects the appropriate value. Enter a note describing the update, then click Update at the bottom of the window to apply the changes.

The selected Job Status, Sub-Status, and note are applied to all checked Purchase Orders.

- ➢ Follow the same steps shown in the earlier instructions and screenshots. Once the window is displayed, the process is the same as updating the field from the PO Details page.

12. Update the Estimated Completion Date

Use **Estimated Completion** to keep Lumen aligned with your expectations for when the work will be finished, especially if the schedule changes after the PO is issued. It supports planning, coordination, and tracking against the **Due Date**, and it helps you communicate schedule shifts before the job becomes late

Typical reasons you would update it:

- Access/permitting/materials/weather are pushing the schedule.
- The customer rescheduled, or the site isn't ready.
- You have already started work and now have a clearer finish date.
- You need to communicate a new target date before the Due Date is missed.

12.1 Update Estimate Completion Date from the PO Detail Page (Tile Area)

- ➢ In the PO Details Title Area, select the blue pencil next to Est. Completion field.

The system opens the Update Est. Completion, window.

- Select the **Calendar Icon** to choose a new date. This lets you communicate updated timing while you are updating Job Status.

- Provide a note with the update (mandatory). A note is required every time you update your Estimated Completion Date. In the **Provide a note with the update** field, enter the reason or context for the change. This note supports traceability and is recorded with the status update event.

- Save or Exit

➢ Select **Update** to apply the changes or Select **Cancel** to exit without saving.

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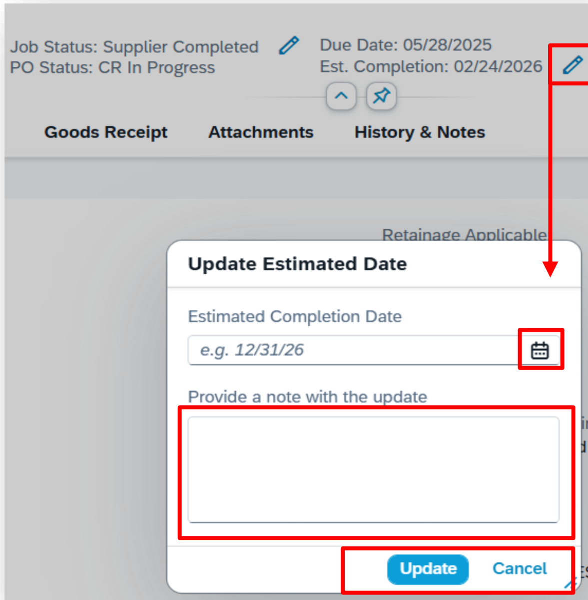
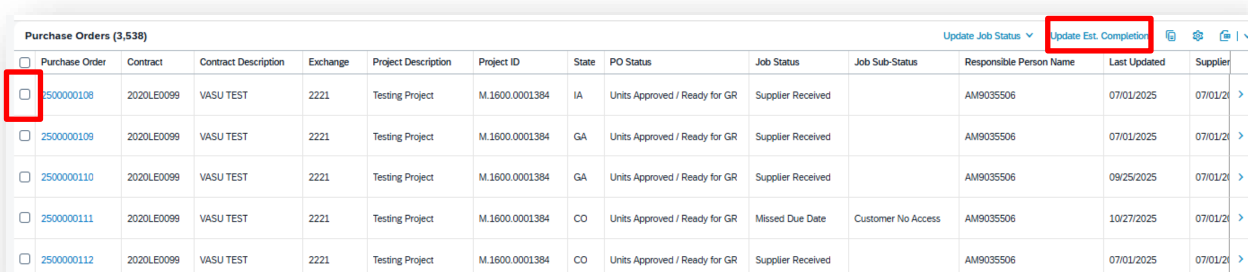


12.2 Update Estimate Completion Date from the MPO Landing Page

➢ From the MPO landing page, locate the Purchase Order to be updated and select the checkbox at the beginning of the row

The Update Est. Completion button in the top-right area of the Purchase Order table becomes active.



Purchase Order	Contract	Contract Description	Exchange	Project Description	Project ID	State	PO Status	Job Status	Job Sub-Status	Responsible Person Name	Last Updated	Supplier
2500000108	2020LE0099	VASU TEST	2221	Testing Project	M.1600.0001384	IA	Units Approved / Ready for GR	Supplier Received		AM9035506	07/01/2025	07/01/2(
2500000109	2020LE0099	VASU TEST	2221	Testing Project	M.1600.0001384	GA	Units Approved / Ready for GR	Supplier Received		AM9035506	07/01/2025	07/01/2(
2500000110	2020LE0099	VASU TEST	2221	Testing Project	M.1600.0001384	GA	Units Approved / Ready for GR	Supplier Received		AM9035506	09/25/2025	07/01/2(
2500000111	2020LE0099	VASU TEST	2221	Testing Project	M.1600.0001384	CO	Units Approved / Ready for GR	Missed Due Date	Customer No Access	AM9035506	10/27/2025	07/01/2(
2500000112	2020LE0099	VASU TEST	2221	Testing Project	M.1600.0001384	CO	Units Approved / Ready for GR	Supplier Received		AM9035506	07/01/2025	07/01/2(

After the Update Est. Completion Status window is displayed, follow the same steps you use to update Job Status from the PO Details page.

Note: This step is used to **Bulk update the Est. Completion** Date for multiple purchase orders. It applies only when working with more than one PO, and only when all selected POs share the same Due Date.

- On the Manage Purchase Orders landing page, select multiple POs by checking the boxes at the beginning of each row.

The Update Estimated Date button becomes active. Click the button to open the Update Estimated Date window, select the new date, enter a note describing the update, and click Update at the bottom of the window to apply the changes. These updates will be applied to all checked POs.

"Follow the same steps shown in the earlier instructions and screenshots. Once the window is displayed, the process is the same as updating the field from the PO Details page."

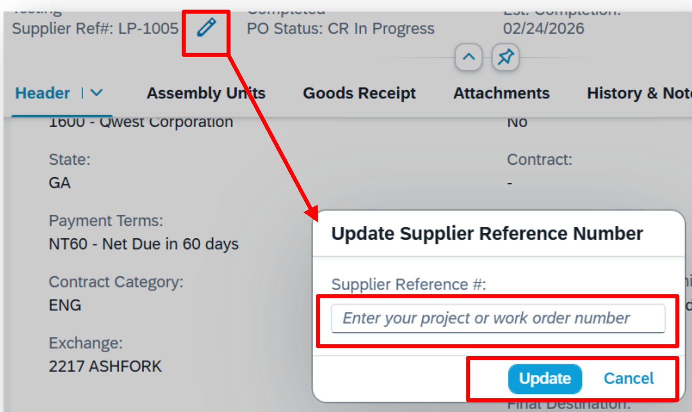
13. Update Supplier Reference

Maintain your internal reference number for the PO so your team can match the PO to your internal job/work tracking.

- In the PO Details Title Area, select the blue pencil next to Supplier Ref#.

The system opens the Supplier Reference window.

- Add your Supplier Reference. Select **Updat**e to apply the changes. Select **Cance**l to exit without saving.



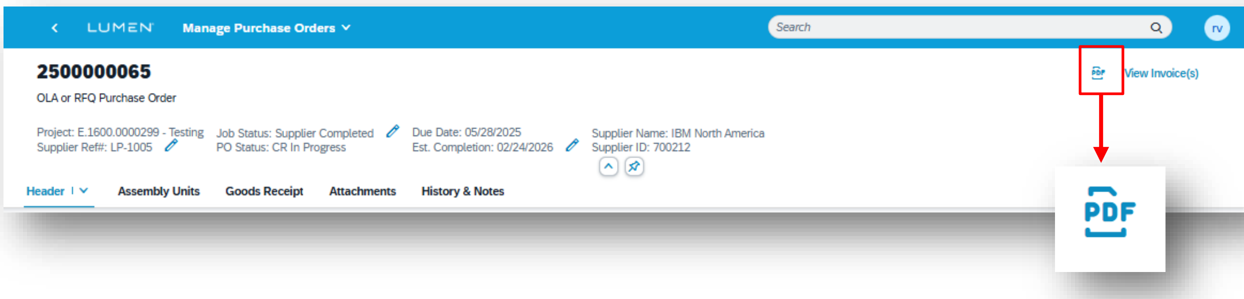
These are the fields you can edit in the Title Area. Other fields may also appear, but they are system-driven and control the PO lifecycle based on automated status logic.

14. Access PDF Copy of PO – Title Area

Use the PDF download option to generate a PDF copy of the PO details for offline review, printing, or sharing with your internal team. The PDF copy ONLY includes approved units/quantities, which may differ from the AU tab.

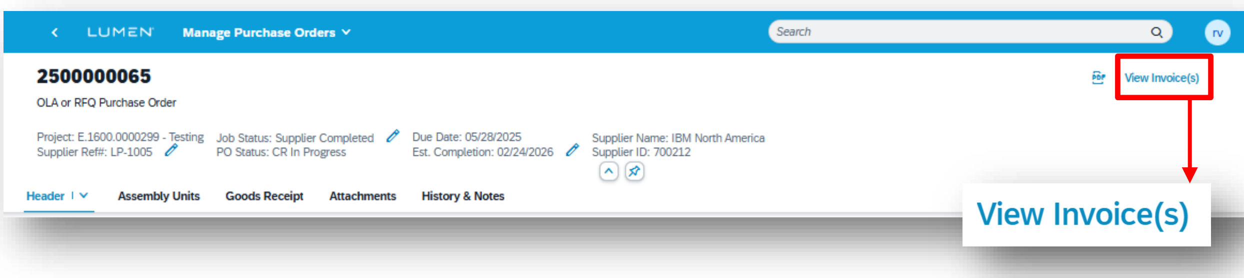
Note: The PDF captures the PO information as it was displayed when you downloaded it.

- Locate the **PDF icon** in the top-right corner of the Title Area, then select it to download a PDF copy of the purchase order.



15. View Invoice(s) Link (PO to Invoice Navigation)

From the Manage Purchase Orders tile, after you open a specific PO, you can navigate directly to the View Invoice(s) link to open the Manage Invoices tile for that PO. You use the View Invoice(s) link on the MPO tile to check invoice activity for the same PO you're currently working on, without searching the Invoices app again.



15.1 PO Details Page

Below the Title Area, the PO Details page includes a tab menu. Each tab opens a different section of the PO where you complete specific activities during execution. Use these tabs to review PO information, manage scope changes, confirm completed work, and maintain supporting documentation and traceability. The tabs are:

- **Header** (PO summary details)
- **Assembly Units** (scope + Change Requests)
- **Goods Receipt** (confirm completed work)
- **Attachments** (view/upload documents linked to the PO)
- **History & Notes** (audit trail of updates, including comments and status changes)

16. Header Tab (PO Details) – Deep Dive

Use the Header tab to validate the PO context before taking any execution action (Change Request, Goods Receipt, attachments, or invoicing). This tab is the supplier's "single source of truth" for the PO's header-level attributes and confirms that the PO you opened is the correct one for the job you are about to perform.

16.1 What the Header Tab is used for

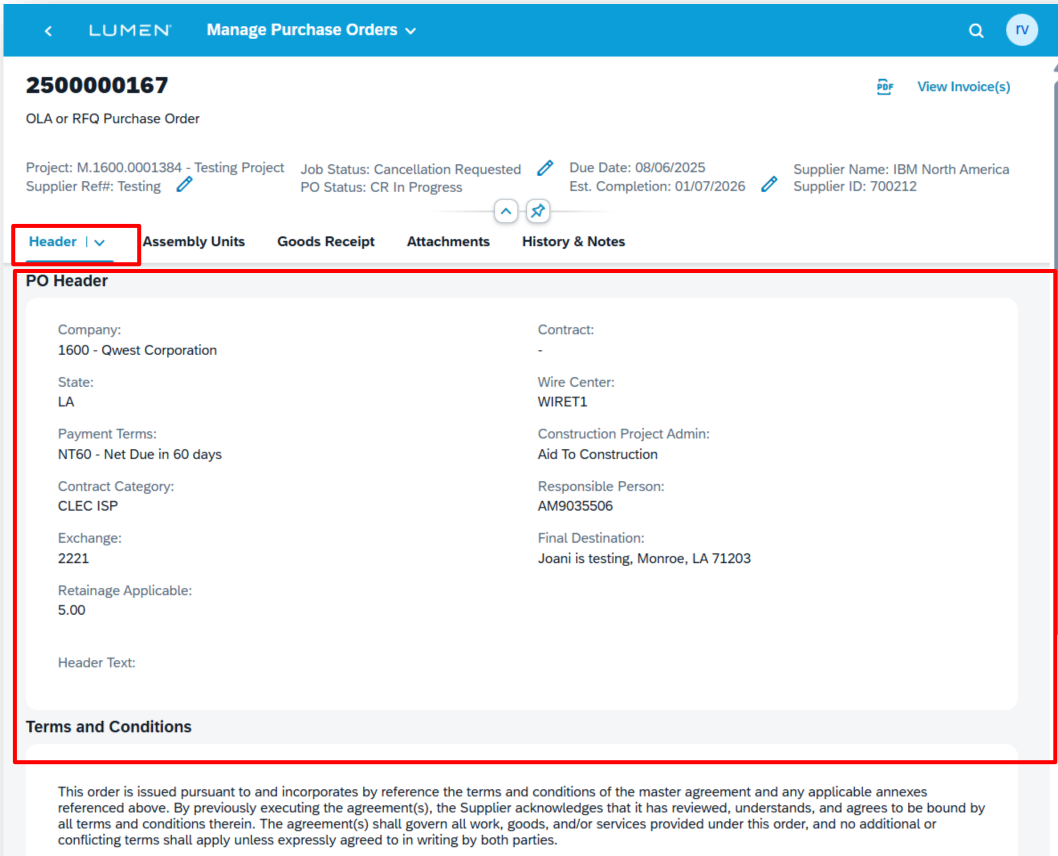
Use the Header tab to:

- Use Contract / Contract Category / RFQ to confirm whether the PO is associated with OLA contract work or RFQ-awarded work.
- Use State / Wire Center / Geocode to confirm geographic/job context.
- Use the Responsible Person / Construction Project Admin to know who is accountable on the Lumen side for approvals and coordination.
- Use Payment Terms / Retainage Applicable to understand payment conditions that can impact invoices.
- Review the Header Text and the Terms and Conditions section before proceeding with execution steps.

16.2 Header Tab – Attributes (what you see on the "Header" tab)

The Header tab displays these attributes:

- Company
- Contract
- Contract Category
- BidMaster Reference #
- State
- Exchange
- Wire Center
- Geocode
- Supplier
- RFQ
- Responsible Person
- Construction Project Admin
- Payment Terms
- Retainage Applicable
- Header Text
- Terms and Conditions section



Note: Even if the tab menu does not appear in this exact order in PGW, this training will review the tabs in the following sequence for clarity: first **Attachments** and **History & Notes** (reference and audit information), then the action tabs where work is performed, **Assembly Units,** and **Goods Receipt**.

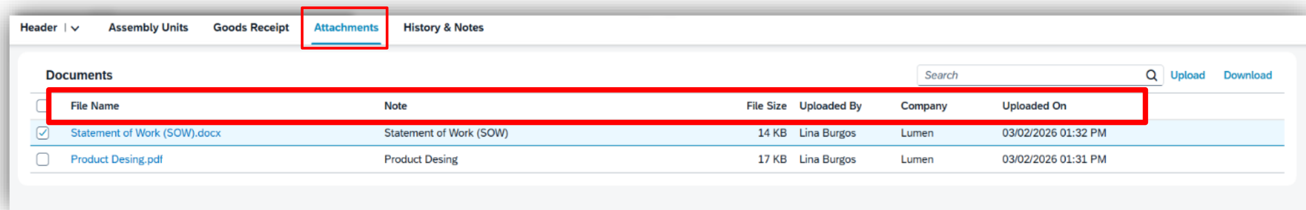
17. Attachments Tab – Deep Dive

The **Attachments** tab is where supporting Purchase Order documents are reviewed, downloaded, and, when enabled for the assigned role, uploaded.
This tab should be treated as the single source of truth for PO documentation, and it must be used as a prerequisite checkpoint before performing any execution actions. If the PO includes scope-driving files (for example, drawings, BOM/scope sheets, Statements of Work, or quote/RFQ artifacts), open and validate them first to confirm they align with the PO line content and status before making changes in the action tabs.

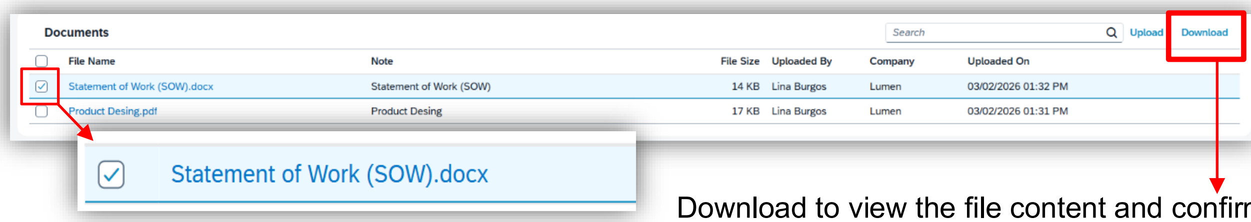
- Open the PO and select the Attachments tab from the tab menu.

Review the list of files already linked to the PO and confirm the attachments match the work you are about to perform.
When reviewing attachments, focus on these items:

- Document name/description: Confirms what the file is intended for (drawings, scope documents, RFQ/quote artifacts, support documents, etc.).
- File Size
- Uploaded by / source (if shown): Helps confirm whether the document came from Lumen, the supplier, or an upstream system process.
- Company
- Upload On: date/time (if shown): Ensures you are using the most recent version, especially when multiple versions exist.



➢ Download one or more files by selecting them and clicking the Download button in the toolbar.



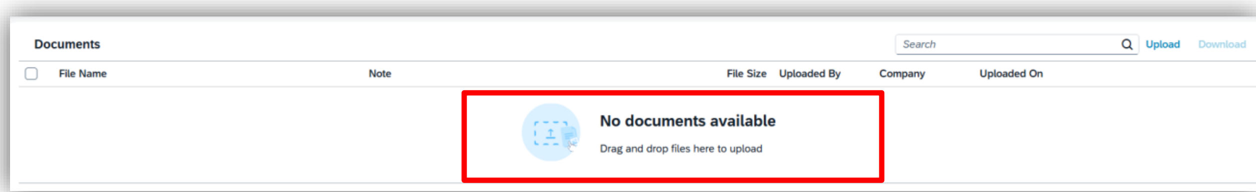
Download to view the file content and confirm it aligns with the current PO scope and the latest change request activity.

When you select the download option, the file is downloaded to your device. Depending on your browser and download settings, the file may open automatically, or you may be prompted to **open** it or **save** it.

You can upload business-relevant documents needed for audit, receiving, invoicing, or dispute resolution. Use clear file names and upload only documents that support the PO work.

To upload a document, you have two options:

➢ Drag and drop files into the "Drag and drop files here to upload" area.

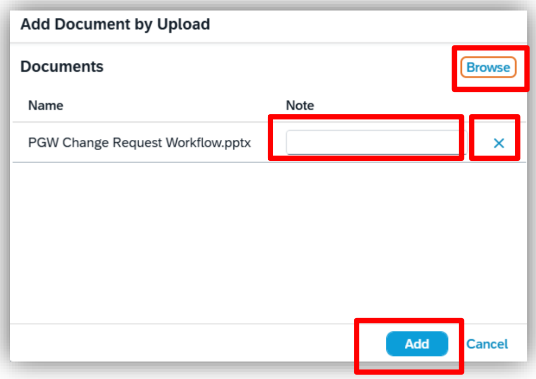


If a document has already been uploaded and the drag-and-drop area is no longer visible, you can still drag and drop files directly onto the table; the functionality remains available.

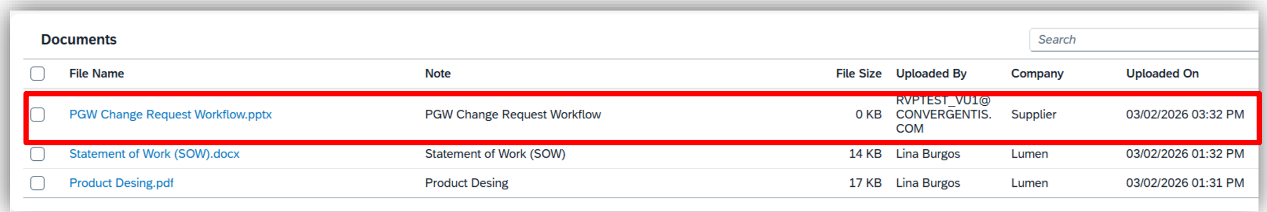
➢ Click the Upload button.

A file-browser window opens, allowing you to select a document from your device. Locate the desired file and click Open in the bottom-right corner.
The Add Document by Upload screen appears. The selected file name is displayed under the Name field.

- Enter a **Note** for the uploaded document (optional)
- Upload additional files, click the **Browse** button in the top-right corner of the pop-up window.
- To remove a file before uploading, click the **X** icon at the end of the row.



➢ When ready, click Add. The system displays a message "*Document added".*

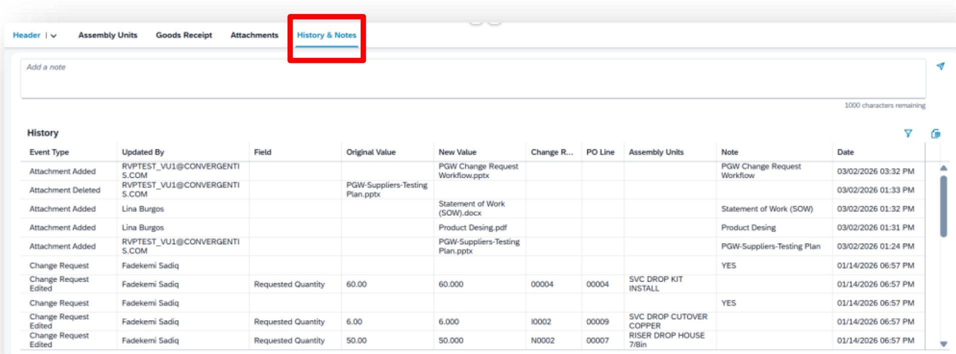


File Name	Note	File Size	Uploaded By	Company	Uploaded On
PGW Change Request Workflow.pptx	PGW Change Request Workflow	0 KB	RVPTEST_VU1@ CONVERGENTIS. COM	Supplier	03/02/2026 03:32 PM
Statement of Work (SOW).docx	Statement of Work (SOW)	14 KB	Lina Burgos	Lumen	03/02/2026 01:32 PM
Product Desing.pdf	Product Desing	17 KB	Lina Burgos	Lumen	03/02/2026 01:31 PM

The attachments table refreshes, and the file is added to the list.

18. History & Notes Tab — Deep Dive

Use **History & Notes** as the PO's **audit trail**. This tab is where you validate *what changed*, *who changed it*, *when it changed*, and *what note/comment was recorded* to explain the change. It is the best place to confirm traceability after you update header fields, submit a Change Request, withdraw a line, respond to a rejection, upload or delete an attachment



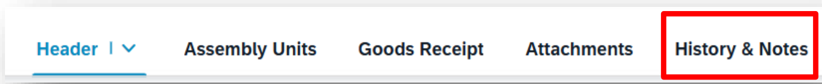
Event Type	Updated By	Field	Original Value	New Value	Change R...	PO Line	Assembly Units	Note	Date
Attachment Added	RVPTEST_VU1@CONVERGENTI S.COM			PGW Change Request Workflow.pptx				PGW Change Request Workflow	03/02/2026 03:32 PM
Attachment Deleted	RVPTEST_VU1@CONVERGENTI S.COM		PGW-Suppliers-Testing Plan.pptx						03/02/2026 01:33 PM
Attachment Added	Lina Burgos			Statement of Work (SOW).docx				Statement of Work (SOW)	03/02/2026 01:32 PM
Attachment Added	Lina Burgos			Product Desing.pdf				Product Desing	03/02/2026 01:31 PM
Attachment Added	RVPTEST_VU1@CONVERGENTI S.COM			PGW-Suppliers-Testing Plan.pptx				PGW-Suppliers-Testing Plan	03/02/2026 01:24 PM
Change Request	Fadekemi Sadiq							YES	01/14/2026 06:57 PM
Change Request Edited	Fadekemi Sadiq	Requested Quantity	60.00	60.000	00004	00004	SVC DROP KIT INSTALL		01/14/2026 06:57 PM
Change Request	Fadekemi Sadiq							YES	01/14/2026 06:57 PM
Change Request Edited	Fadekemi Sadiq	Requested Quantity	6.00	6.000	I0002	00009	SVC DROP CUTOVER COPPER		01/14/2026 06:57 PM
Change Request Edited	Fadekemi Sadiq	Requested Quantity	50.00	50.000	N0002	00007	RISER DROP HOUSE 7/8in		01/14/2026 06:57 PM

18.1 What gets recorded in History & Notes

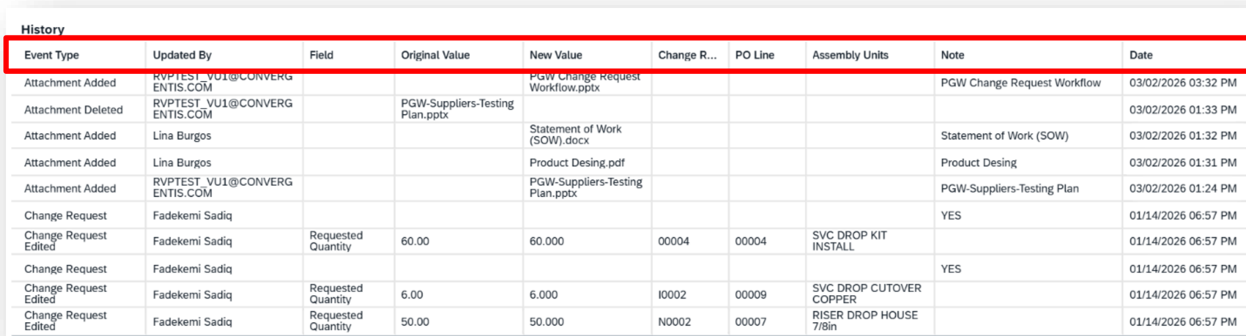
- *System-driven status progression*

Some status changes are system-applied (for example, schedule-driven Job Status changes such as At Risk/Missed Due Date or processing steps during approvals/sync). History & Notes helps you see when those changes occurred and whether additional user input (like a sub-status reason) was later added.

➢ Open the PO and select **History & Notes** from the bottom tab menu. Review the entries from newest to oldest to understand the latest activity first.



➢ Review the columns for the History and Notes Table



History

Event Type	Updated By	Field	Original Value	New Value	Change R...	PO Line	Assembly Units	Note	Date
Attachment Added	RVPTEST_VU1@CONVERGENTIS.COM			PGW Change Request Workflow.pptx				PGW Change Request Workflow	03/02/2026 03:32 PM
Attachment Deleted	RVPTEST_VU1@CONVERGENTIS.COM		PGW-Suppliers-Testing Plan.pptx						03/02/2026 01:33 PM
Attachment Added	Lina Burgos			Statement of Work (SOW).docx				Statement of Work (SOW)	03/02/2026 01:32 PM
Attachment Added	Lina Burgos			Product Desing.pdf				Product Desing	03/02/2026 01:31 PM
Attachment Added	RVPTEST_VU1@CONVERGENTIS.COM			PGW-Suppliers-Testing Plan.pptx				PGW-Suppliers-Testing Plan	03/02/2026 01:24 PM
Change Request	Fadekemi Sadiq							YES	01/14/2026 06:57 PM
Change Request Edited	Fadekemi Sadiq	Requested Quantity	60.00	60.000	00004	00004	SVC DROP KIT INSTALL		01/14/2026 06:57 PM
Change Request	Fadekemi Sadiq							YES	01/14/2026 06:57 PM
Change Request Edited	Fadekemi Sadiq	Requested Quantity	6.00	6.000	I0002	00009	SVC DROP CUTOVER COPPER		01/14/2026 06:57 PM
Change Request Edited	Fadekemi Sadiq	Requested Quantity	50.00	50.000	N0002	00007	RISER DROP HOUSE 7/8in		01/14/2026 06:57 PM

- *Columns Displayed on the History & Notes Table*

- **Event Type**

▪ Field Update events

- PO Status update (system-driven)
- Job Status update (supplier/Lumen/system)
- Estimated Completion update (supplier)
- Supplier Reference # update (supplier)

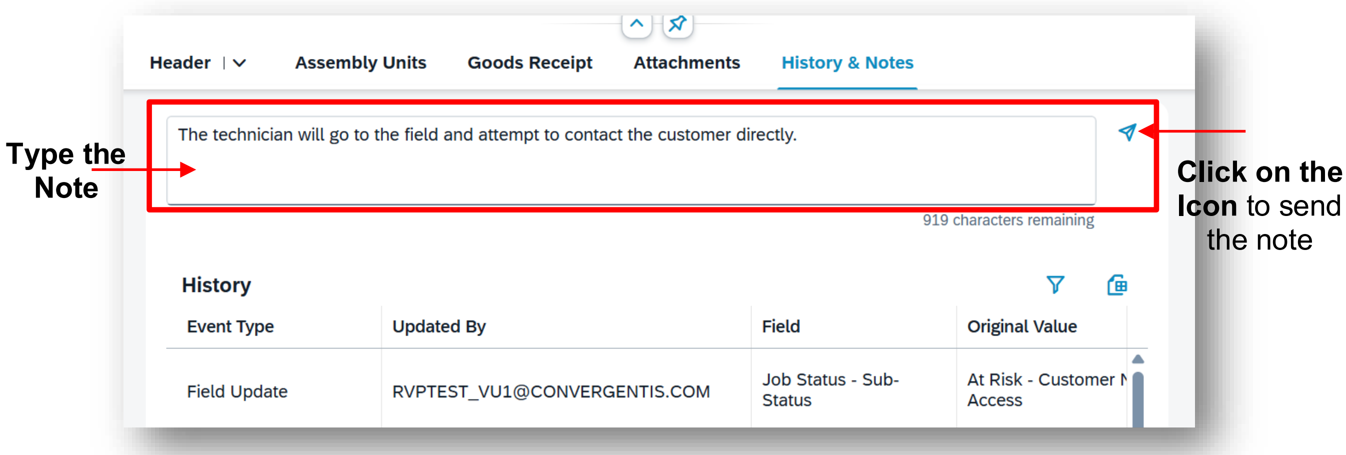
▪ **Request events**

- Change Request (entered in PGW)
- Add net new AU (new line)
- Increase qty of AU (new line)
- Reduce qty of AU

- **Attachment events** Attachment added or removed
- **Note events** Note Entry (free-text note added to the event history)
- **Updated By** Shows who performed the action (supplier user ID or Lumen username).
- **Field** shows the specific field that was changed when the event is a field update, for example, visible: Requested Quantity for Change Request edits.
- **Original Value** shows the previous value before the change (example: Requested Quantity before the edit
- **New Value** shows the value after the change (example: Requested Quantity after the edit, or the file name for an attachment event).
- **Change Request Line** this column references the change-request-related identifier for the affected record (in your screenshot, it displays values like 00004, I0002, N0002, depending on the entry).
- **PO Line** shows the PO line number affected (examples: 00004, 00009, 00007).
- **Assembly Units** shows the Assembly Unit name/description impacted (examples visible: SVC DROP KIT INSTALL, SVC DROP CUTOVER COPPER, RISER DROP HOUSE 7/8in).
- **Note** shows the note captured with the event when applicable (examples visible: file-related notes like Statement of Work (SOW) and a YES indicator on some change request rows).
- **Date** shows the timestamp of the event (example format visible: MM/DD/YYYY HH: MM AM/PM).

➢ Add a Note (Top of the History table)

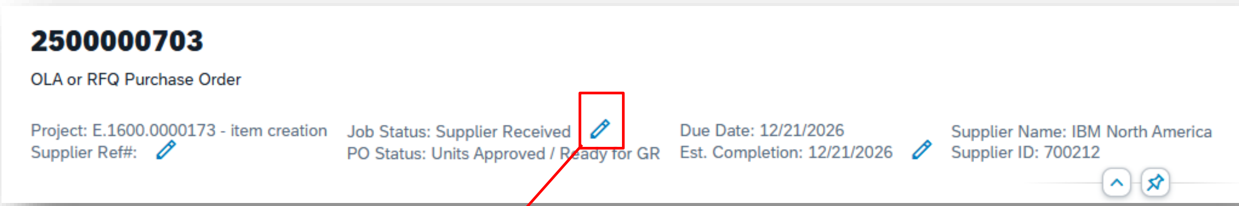
At the top of the tab, you can enter a note in the Add a note text box and send it using the send icon on the right. The counter shows how many characters remain (example: 1000 characters remaining).
How to use it

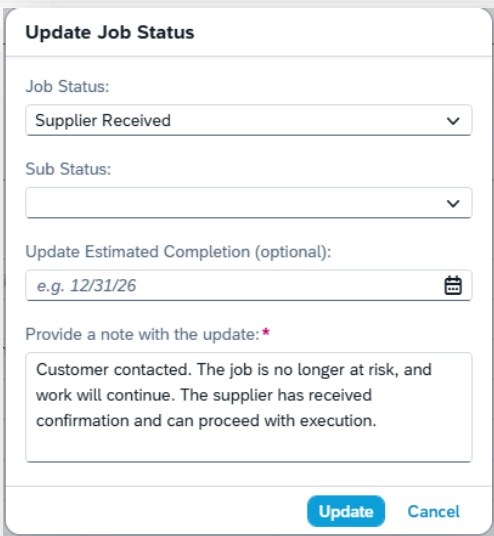


The note is submitted and becomes part of the PO’s history record.

Scenario: The customer was contacted, and communication was restored

➢ Update the **Job Status** from the Title Area using the Job Status field, as covered earlier in this training.





The job was flagged as **At Risk,** and a delay reason was recorded (**Customer No Access**). To document the situation, a note was entered stating that the technician would go to the field and attempt to contact the customer directly. After the customer was contacted and communication was restored, the job was no longer at risk. The Job Status was then updated back to **Supplier Received**, confirming the supplier has received the confirmation, and work can proceed.

Field	Original Value	New Value	Change R...	PO Line	Assembly Units	Note
Job Status - Sub-Status	At Risk - Customer No Access	Supplier Received - Customer No Access				Customer contacted. The job is no longer at risk, and work will continue. The supplier has received confirmation and can proceed with execution.
Notes		The technician will go to the field and attempt to contact the customer directly.				The technician will go to the field and attempt to contact the customer directly.
Job Status - Sub-Status	Supplier Received	At Risk - Customer No Access				Can't contact the Customer

Using Job Status updates and notes in PGW keeps Lumen continuously informed of what is happening on the job, with all communication captured directly in the system rather than scattered across emails or calls. Each update is time-stamped, linked to the PO, and recorded in **History & Notes**, creating a complete audit trail that can be reviewed later for reporting, compliance, and issue follow-up

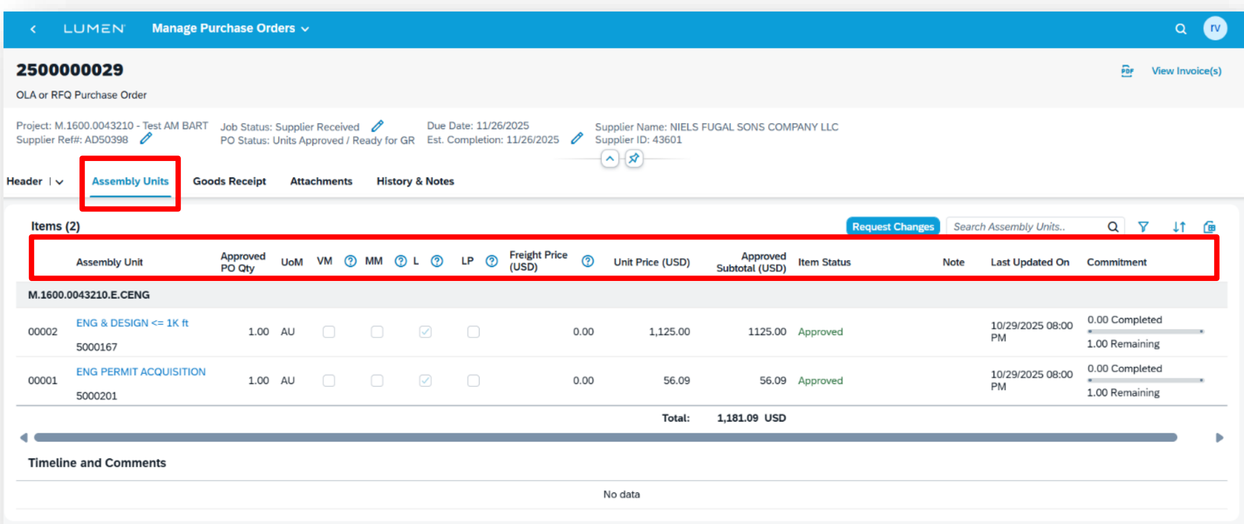
19. Assembly Units Tab – PO Change Request (How it is performed)

Use the Assembly Units tab to review your approved scope at the AU line level and submit a PO Change Request when the scope must change. This tab is where you request updates to work quantities and where you monitor the item-level status of each requested change.

The **Assembly Units** tab displays an AU table, with each row representing an Assembly Unit line. The table shows both the currently approved scope and any changes you are requesting.

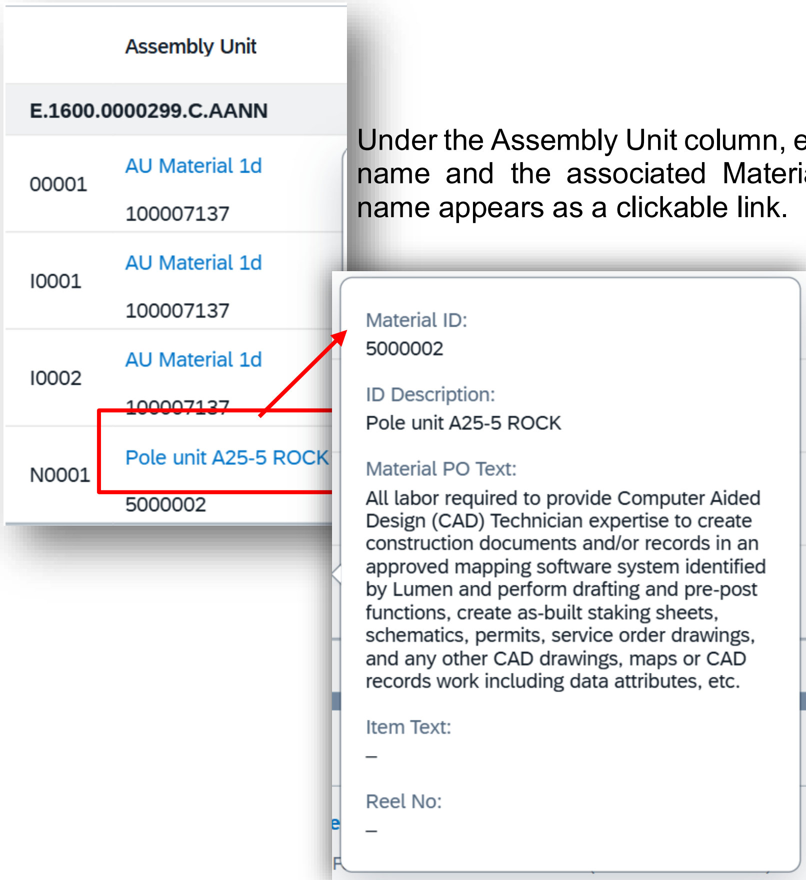
The Table includes these Columns:

- **Assembly Unit** (AU line identifier and description)
- **Approved PO Qty** (current approved quantity)
- **Requested Qty** (the new quantity you are requesting)
- **UoM** (Units of Measure)
- Component indicator columns (**VM**, **MM**, **L**, **LP**) with information icons
- Freight Price (USD), Unit Price (USD)
- Approved Subtotal (USD) and New Subtotal (USD)
- Item Status (line-level status such as Approved or Pending Unit Confirmation)
- Note and Last Updated
- **Timeline and Comments** section is also displayed below the table to track change request activity and comments.



This step relates to the Columns menu section. For complete instructions, refer to: Module 1. Getting Started in PGW: Overview, Login, Preferences, and Navigation. Section: 8.1.3 Table Controls (search, sort, refresh, columns, export).

19.1 Assembly Unit (AU line identifier and description)



Under the Assembly Unit column, each line displays the material name and the associated Material ID number. The material name appears as a clickable link.

When you select the material name, PGW opens a details panel that displays the full material information (for example Material ID, Item Text, Material PO Text, and other reference fields) so you can review the material details without leaving the Assembly Units tab

19.2 Component Indicators on Assembly Units, including NEW lines

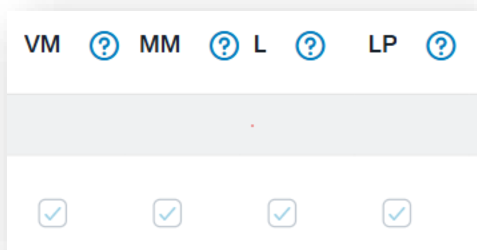
In the Assembly Units tab, the component indicator columns (VM, MM, L, LP) show the types of cost components included in each Assembly Unit (AU) line. These indicators are not switches. Instead, they tell you what the AU line is made of so you can interpret scope and pricing before submitting a Change Request or Goods Receipt.

When a component indicator is checked, it means that the component type is included in that AU line. When it is unchecked, that component type is not included in that AU line. Different AUs can have different combinations depending on what the work package includes (for example, a labor-only AU versus an AU that includes labor plus minor material, or a larger AU that includes multiple component types).

The component types are:

- **VM (Vendor Material):** Vendor/major material pricing passed through Lumen's material distributor to you.
- **MM (Minor Material):** Minor material pricing passed through from Lumen's material distributor to you.
- **L (Labor):** Labor pricing provided by you (the supplier).
- **LP (Locally Purchased):** Locally purchased material pricing provided by you (the supplier).

When you add a NEW AU line during a Change Request, you may notice that PGW lets you toggle some of these component indicators. This happens because a new line must be classified correctly so the system can calculate pricing and apply validations. Even if the UI allows you to toggle the component flags, your selections may still be governed by system rules (invalid combinations may be rejected or corrected). The goal is to ensure the new AU line is created with the correct component structure so the change request can be processed and approved correctly.



19.3 Item Status Overview (LE – OLA/RFQ POs)

Use Item Status in the Assembly Units tab to understand where each AU line is in the Change Request lifecycle. Item Status is a line-level status. A single PO can have multiple AU lines in different item statuses at the same time.

- *Item Status vs PO Status (important difference)*

  - PO Status is a header-level summary (example: CR In Progress, Units Approved / Ready for GR, Closed).
  - Item Status is per AU line and tells you exactly what is happening to that specific line (example: Approved, Pending Unit Confirmation, Pending Supplier – Unit Change, Approved (Syncing)).

- *Why Item Status Matters*

Item Status tells you:
- whether you can edit a line,
- whether the line is waiting on Lumen confirmation/approval,
- whether the change is being synchronized back to the PO (syncing),
- whether you must rework or withdraw a rejected change.
- It also drives the "what needs attention" visibility on the MPO landing page through the Items Pending chart.

- *How PGW summarizes pending work (LE)*

On the MPO landing page, Items Pending helps you see whether action is pending with you or with Lumen:
Pending with Supplier (your action)
- In LE, this includes lines returned to you, such as:
  - Pending Supplier – Unit Change
  - Pending with Lumen (waiting for approvals)

In LE, this includes lines waiting for confirmation/approval, such as:
- Pending Unit Confirmation
- Pending Financial Approval
- Approved (Syncing)
- Budget Error
- EFAA Rejected

- *Item Status process flow (LE-only, supplier-initiated)*

This is the most common LE flow you will experience when you initiate a change request:
- Approved (starting point)
- You request a change (increase/decrease/remove/add) and submit
- Line moves to Pending Unit Confirmation
- If Lumen confirms → line moves forward (may go into Pending Financial Approval)
- If Lumen rejects → line returns to Pending Supplier – Unit Change (you revise or withdraw)
- After approvals complete → Approved (Syncing)
- After sync completes → Approved

- *Special behavior for increases (INCR line)*

For quantity increases, PGW may create a new increment line and display a "New Line Added" message. That increment line is what moves through Pending Unit Confirmation and onward, while the originally approved scope remains available for execution.

- *Special behavior for withdrawal*

If the system detects that Requested Qty = Approved PO Qty, it can treat the change as withdrawn and remove the pending change request once you submit (with a mandatory comment).

- *Item Status + PO Status relationship (LE)*

    - When at least one AU line is in a pending change state (Pending Unit Confirmation / Pending Supplier – Unit Change / Pending Financial Approval / Approved (Syncing), etc.),

The PO header will typically show:

- PO Status = CR In Progress

- When all change request lines are fully processed and synchronized, the PO returns to:
    - PO Status = Units Approved / Ready for GR

- *Update Item Status (How it changes)*

You do not manually set Item Status, as with Job Status. Item Status changes automatically based on:

- the quantities you enter in Change Request mode,
- submitting the change request,
- Lumen confirmation or rejection,
- budget/tolerance outcomes,
- and PR/PO synchronization.

You use Item Status to understand what action is required (if any) and when a line is ready to proceed, without manually changing the status field.

19.4 LE-Only Item Status — Quick Decision Guide (What to do next)

Use this guide any time you are in Assembly Units and need to decide what to do based on Item Status.

- *Item Status: Approved*
    - **What does it mean:** No active change is pending on this line.
    - **Do this:** Proceed with normal execution or start a new Change Request on this line if the scope/quantity must change.

- *Item Status: Pending Unit Confirmation*
    - What does it mean: Your requested change is waiting for the Lumen Responsible Person (RP) confirmation.
    - Do this:
        - Wait for Lumen confirmation or rejection.
        - Continue working on other approved lines as needed.
    - **Avoid:** Don't try to rework the same line unless it is returned to you.

- *Item Status: Pending Supplier – Unit Change*
    - **What does it mean:** Lumen rejected your change request and returned the line to you
    - **Do this:**
        - Revise and resubmit the requested quantity based on the rejection feedback, or
        - Withdraw the change by resetting the requested quantity back to the original approved value.
    - **Expected Result:**

- Resubmit → returns to Pending Unit Confirmation
- Withdraw → returns to Approved

- *Item Status: Pending Financial Approval*
  - **What does it mean:** The change is moving through financial approval steps (tolerance/EFAA routing may apply).
  - **Do this:** Wait, continue working on other lines not included in the change (if applicable).
  - **Avoid:** Don't attempt to edit this line while it is in approval flow

- *Item Status: Approved (Syncing)*
  - **What does it mean:** Approvals are complete, and the system is synchronizing PR/PO updates. This is the system synchronization step that updates SAP purchasing documents after a change is approved in PGW. When Lumen approves a change request in PGW, the system sends the approved updates to SAP S/4HANA, so the related **Purchase Requisition (PR)** and **Purchase Order (PO)** reflect the same confirmed quantities and values.
  - **Do this:** Wait for the sync to be completed.
  - **Expected Result:** Line returns to Approved after the PO is updated.

- *Item Status: Budget Error*
  - **What does it mean:** Budget check failed for the change.
  - **Do this:** Wait for Lumen to resolve the budget issue or return the item for rework/withdrawal.
  - **Tip:** Check Message Center and Timeline/Comments for updates tied to the change request.

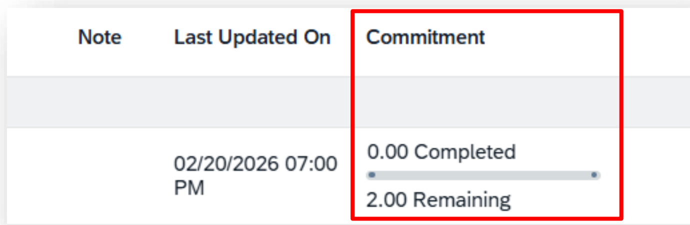
- *Item Status: EFAA Rejected*
  - **What does it mean:** Financial approval rejected the change.
  - **Do this:** Wait for the line to be returned for withdrawal or correction based on Lumen handling.
  - **Tip:** Use Message Center and Timeline/Comments to track the outcome.

19.5 Commitment Bar (Completed vs Remaining)

In the Assembly Units area, the Commitment section shows a progress bar that breaks the unit quantity into Completed and Remaining amounts. The Completed value represents the quantity already completed through goods receipts, and the Remaining value represents what remains open on the line. For example, if the bar shows 0.00 Completed and 10.00 Remaining, it means no receipts have been posted yet, and the full quantity is still available.

Use this bar any time you are preparing a Change Request that reduces quantity or removes a line. The system does not allow a Requested Qty lower than the amount already completed.

If you try to reduce a line below the Completed amount, PGW blocks the entry and displays the message*: "Requested Qty cannot be less than the completed quantity with goods receipts. See Commitment chart."* The Commitment bar is the quick way to confirm the minimum quantity that must remain on the line (it must be at least the Completed amount).



20. LE Change Request (End-to-End)

Let's run an end-to-end LE Change Request on a single Purchase Order to validate the complete lifecycle, from entering **Request Changes** mode, through **Submit Change Request**, and then through rejection handling using **Edit Change Request** and resubmission. Follow the steps in sequence so each Change Request behavior INCREASE line creation, NEW line creation, decrease/remove validations using the Commitment chart, Timeline & Comments updates, rejection response, withdrawal by reverting Requested Qty to Approved Qty) is demonstrated in one continuous run.

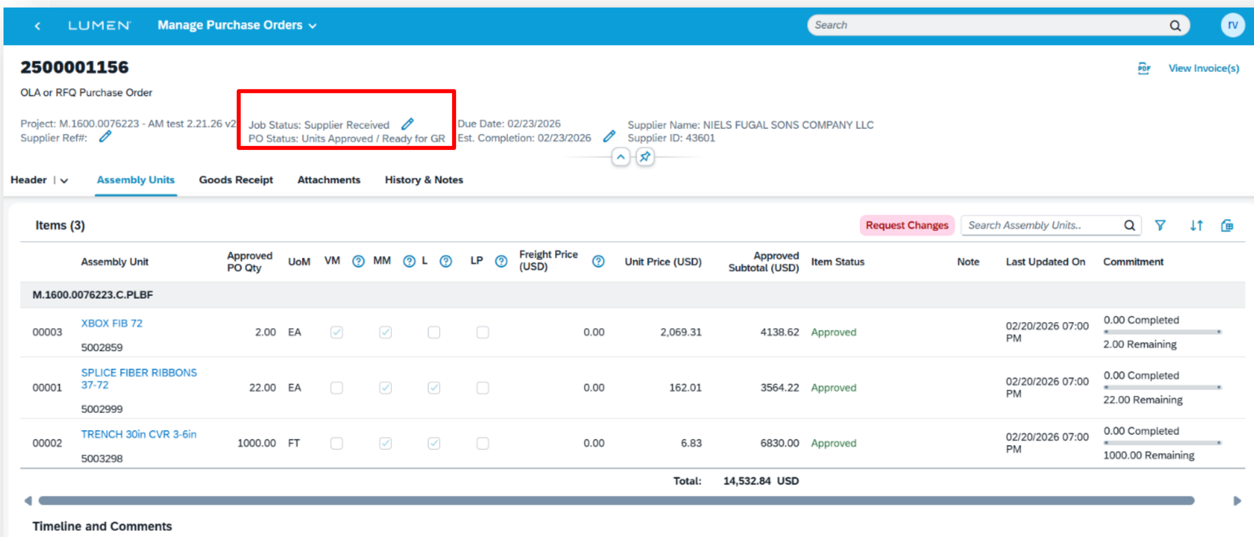
Use a LE PO that meets these conditions before beginning:

- At least 3 existing AU lines are available, so multiple change types can be performed.
- At least 1 AU line has goods receipts already posted (Completed Qty > 0), so the removal validation can be exercised.
- At least 1 AU line has no goods receipts, so it can be safely used for increase/decrease without receipt restrictions.
- The PO value and planned changes are sized so that the change request can follow the expected approval path (use the already documented tolerance guidance if EFAA routing must be triggered).

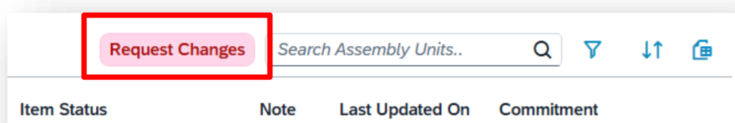
20.1 Enter Change Request Mode and Build a Multi-Change Request

- ➢ Open Manage Purchase Orders, locate the target PO, open it, and go to the Assembly Units tab.

Before starting, confirm the header reflects **Job Status: Supplier Received** and **PO Status: Units Approved / Ready for GR**. This combination indicates that the PO is in its execution phase: the Assembly Units are approved, the PO is eligible for Goods Receipt, and the supplier can proceed with the next steps. If no changes are required, the next step would be to move directly to the **Goods Receipt** tab. For this exercise, a change is required, so remain in the **Assembly Units** tab and select **Request Changes** to initiate the LE Change Request process.

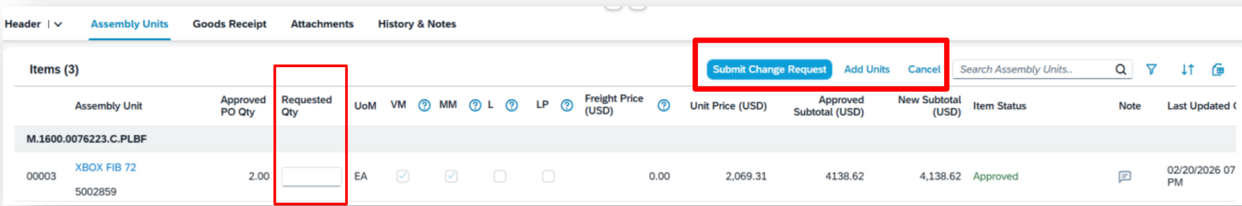


- ➢ Click Request Changes to enter the change request.



- ➢ Confirm that the change request toolbar options appear and the Requested Qty column becomes available

- The Request Changes button is removed
- The Add Units button appears
- The Submit Change Request button appears
- The Cancel button appears

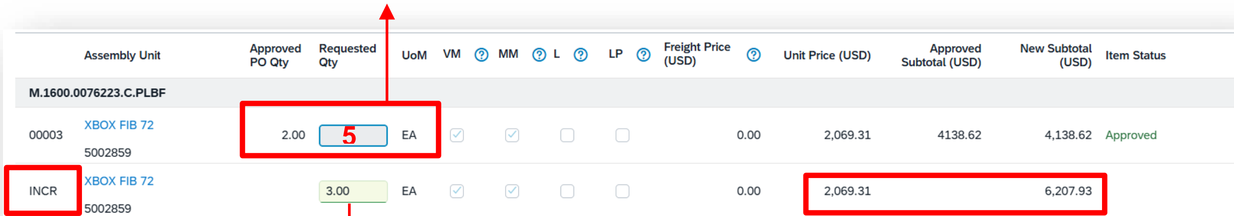


20.2 Increase an Existing AU (Generate an INCR Line)

When increasing the quantity on an existing Assembly Unit line, PGW creates a separate INCR (increment) line. In practice, the quantity on the INCR line represents the additional amount requested beyond what is already approved (for example, if the total units you need are 5 and the Approved PO Qty = 2, the INCR line may be created for 3).

- ➢ Pick an AU line where the Approved Qty can be increased. In Requested Qty, enter a value greater than the approved quantity and confirm the system creates a new line identified with INCR

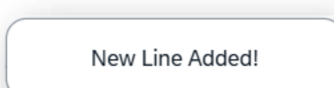
Enter **5** (the total unit quantity required to complete the job).



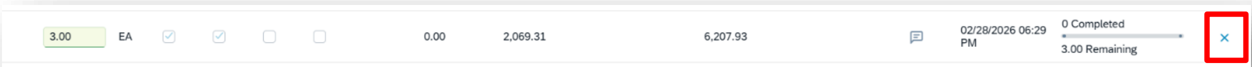
The **INCR** line may be created for **3** (**2 + 3 = 5** total units for the job).

The system applies the **Unit Price** to the line and recalculates the **New Subtotal.**

After pressing **Enter**, a new line is added, and a pop-up message is displayed: “New Line Added: Additional quantity will be added as a new PO line. This allows you to submit goods receipts on the approved quantity while the change request is in progress.” The pop-up also includes the option to select **Don’t remind me again or OK**. After you make your selection, a toast message appears at the bottom of the screen.

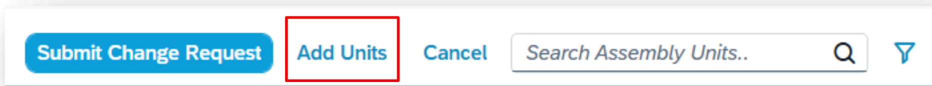


After the new line is created, the **Requested Qty** field returns to **read-only** mode. The INCR line can be deleted before submitting the Change Request. For practice, delete the INCR line by selecting the **X** at the end of the row, confirm the line is removed, then recreate the increase so the INCR line appears again.



20.3 Add a "Net New" AU (Generate a NEW Line)

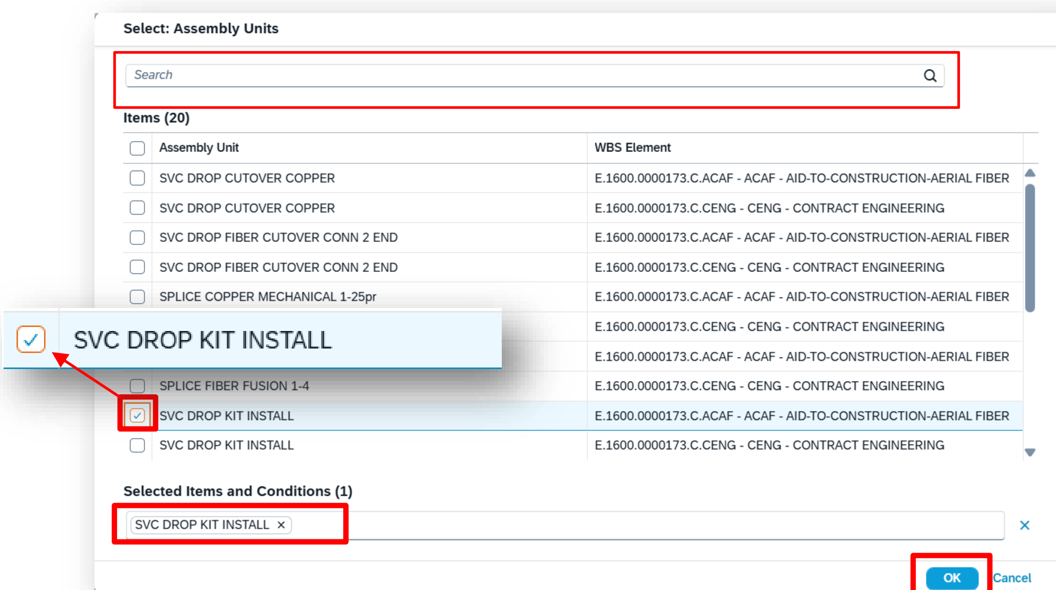
➢ Click Add Units to open Select Assembly Units.



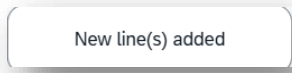
When Add Units is selected, the Select: Assembly Units window opens. At the top of the window, use the Search bar to find an Assembly Unit. The search works as a keyword search across the values displayed in the list, so entering part of an Assembly Unit name/description or a WBS Element value filters the table results.

➢ To add a unit, select the checkbox at the far left of the row you want to add it to. Then select OK to confirm and add the selected Assembly Unit(s) to the PO.

Each selected row is added to the Selected Items and Conditions area at the bottom of the window, where it appears as a selectable "chip" (for example, *AERIAL DELASH - RELASH*). Remove a selection from this area if needed.

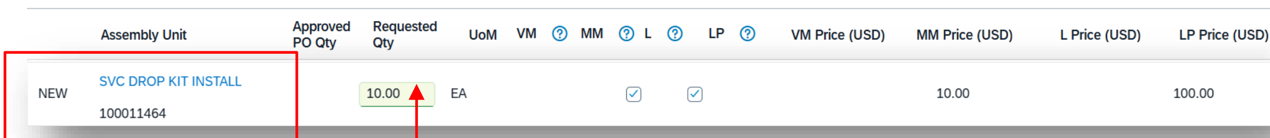


After you make your selection, a toast message appears at the bottom of the screen.



Confirm the newly added line appears in the table marked NEW. Enter a Requested Qty for the NEW line and adjust component selections as needed (only where editable in the table), confirming values recalculate.

- For each newly added line, enter a Requested Qty



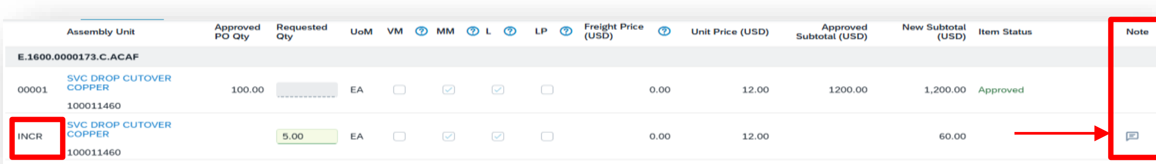
Add the Qty UoM as needed

When adding a Net-New Assembly Unit (AU) as a new line to a LE Change Request, the price is system-calculated based on the existing contract and **cannot be manually changed** in PGW. The system derives line pricing using the AU's component structure and returns the calculated cost components (such as labor, vendor material, minor material, locally purchased, freight, and valuation-related values), so the new line reflects the contract-driven pricing automatically.

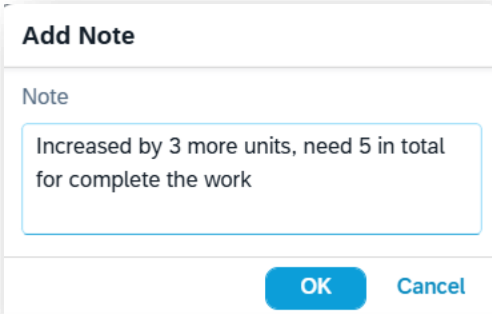
Some AU components are displayed with a checkbox because they are eligible for that AU, but they may be provided by either the supplier or Lumen, depending on the job setup. Toggling the component indicates whether it will be included as supplier-provided for this PO line; components that are not applicable to the AU do not display.

- *Why does a Note Icon appear when New Lines are created on the AU?*

The **Note Icon** appears on a newly created AU line because the line has an **item-level note/comment** associated with it. In the change request flow, a note can be entered specifically for the new line to explain what was added and why; PGW shows the note icon as a visual indicator that "this line includes a message." That note is part of the change request communication and is visible to Lumen during review/confirmation.



➢ Click the **Note icon** to add a shared line note with Lumen for review during change request confirmation. Then Click **Ok**

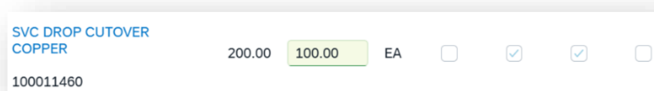


After selecting **OK**, the note is saved. Select the **Note icon** again to confirm the message is attached to the line.

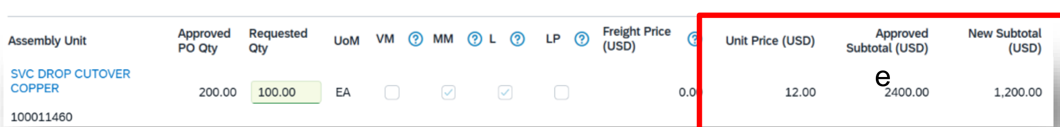
20.4 Reduce the existing AU

When decreasing the quantity on an existing Assembly Unit line, PGW keeps the same line and updates the requested quantity to the lower value. In practice, the new quantity represents the revised total amount needed (for example, if the Approved PO Qty = **200** and the updated quantity needed is **100**, the line is reduced to **100**).

➢ Locate the AU line that needs a reduction and enter a lower value in the Requested Qty field, then press Enter to apply the change.

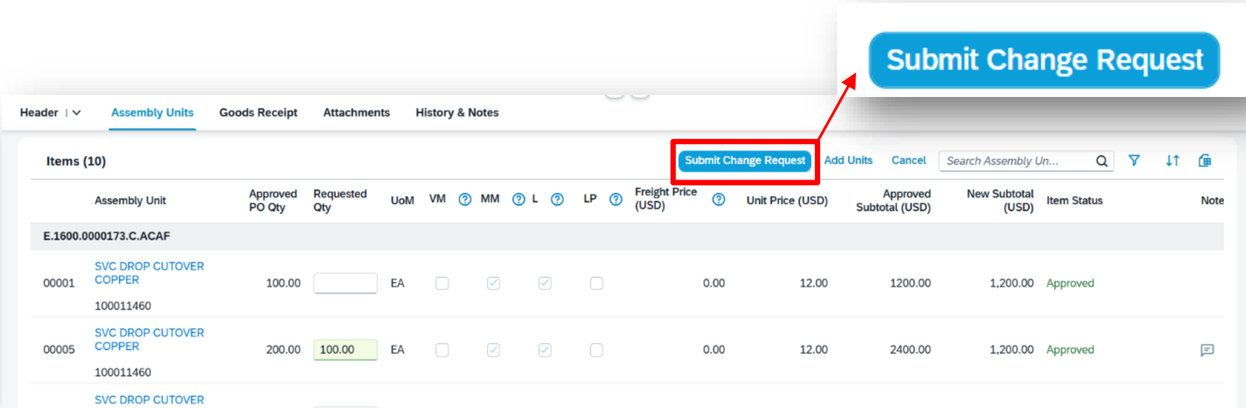


Review the recalculated values on the line, including the updated **New Subtotal**.



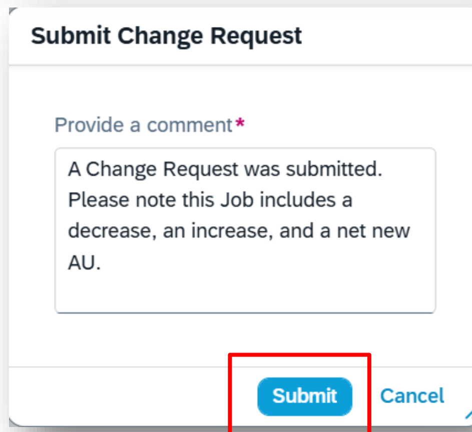
After decreasing the quantity, the **New Subtotal** updates to reflect the lower value based on the approved/unit pricing.

➢ Review all requested changes and confirm they are ready to be submitted, and the Click Submit Change Request

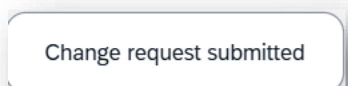


The Submit Change Request window is displayed. Enter a comment (mandatory) and proceed with submission. A confirmation message appears indicating the Change Request has been submitted.

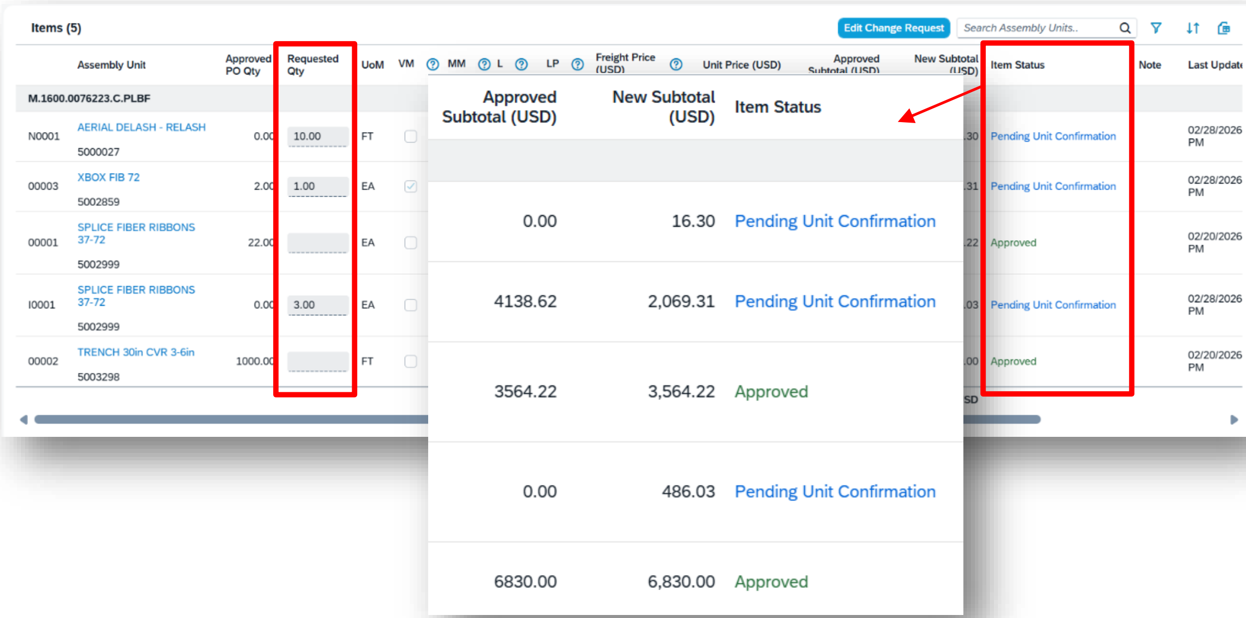
➢ Click Submit.



After submission, a toast message appears at the bottom of the screen.



The item-level **Item Status** updates to **Pending Unit Confirmation**. Any note entered for the line is displayed in Lumen and serves as guidance on whether to accept or reject the requested change. The mandatory comment entered in the Submit Change Request pop-up is displayed below the Assembly Units table in the Timeline and Comments section. The header-level **PO Status** updates to **CR in Progress**, and the fields return to **read-only** mode to prevent further changes while the change request is in progress.



THE CHANGE REQUEST HAS BEEN SUBMITTED AND IS NOW PENDING LUMEN'S RESPONSE.

This is the first action that triggers a notification. When Lumen responds to the Change Request, the update is delivered based on the preferences set in Message Settings, either as an email notification and/or as a Message Center notification. If only Message Center is selected, log in to PGW and check the Message Center to confirm whether a response has been received.

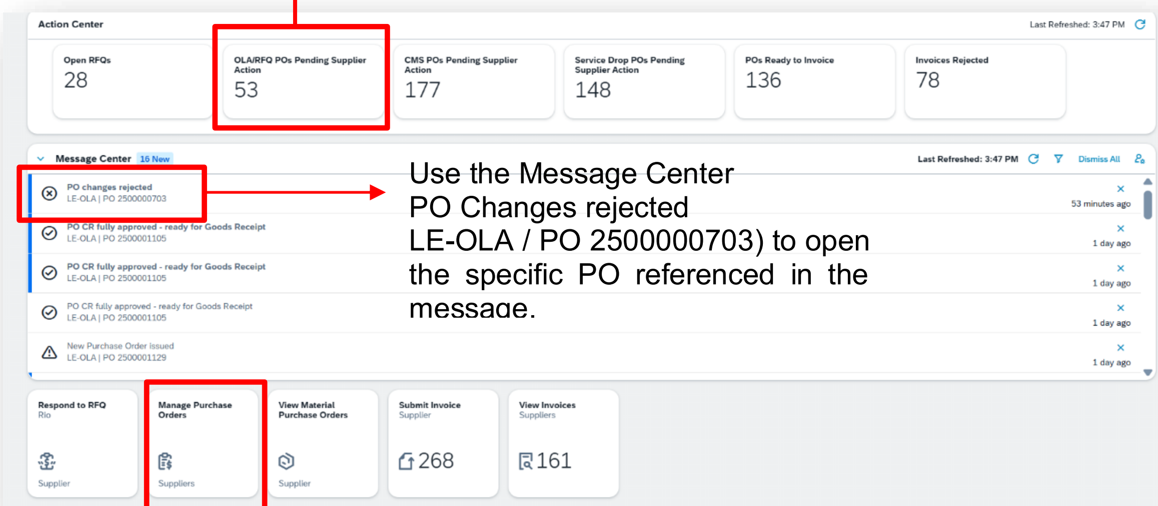
This step relates to the Action and Manage Center settings. For complete instructions, refer to: Module 1. Getting Started in PGW: Overview, Login, Preferences, and Navigation. Section: 6. Home Page Navigation. Action Center, Message Center, and Action Tiles, Page 13.

20.5 Lumen Rejects a Change Request

- Log in to PGW and open the **Home Page**.

Each time PGW opens to the Home Page, there are three ways to continue the process:

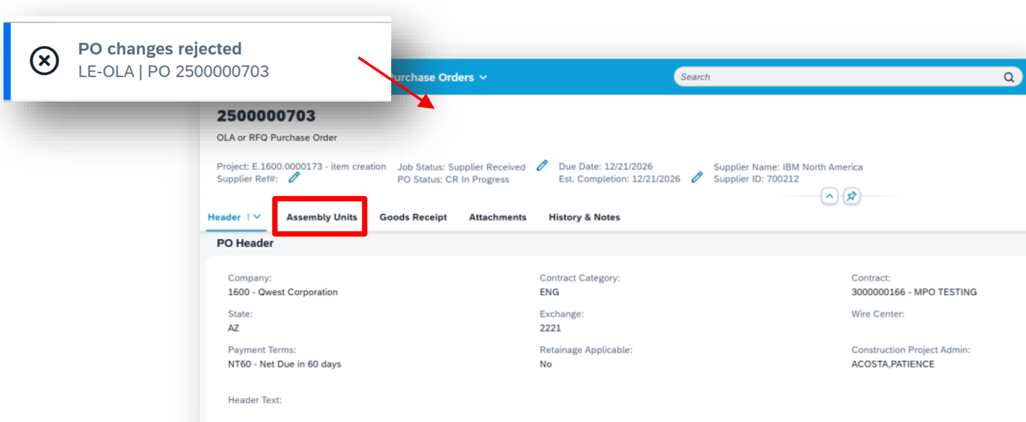
Use the **Action Center tiles** / OLA/RFQ POs Pending Supplier Action to list POs waiting for an action



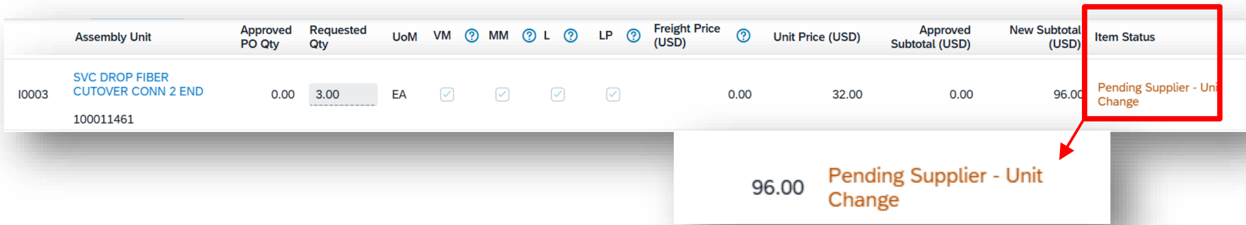
Use the Message Center PO Changes rejected LE-OLA / PO 2500000703) to open the specific PO referenced in the message.

Manage Purchase Orders Tile, where the full list of POs is available. This is how the process started the first time in this training.

- Select **Message Center**, then open the message related to the PO Change Request rejection. The system redirects directly to the specific PO that requires attention. Then Click on the Assembly Units Tab

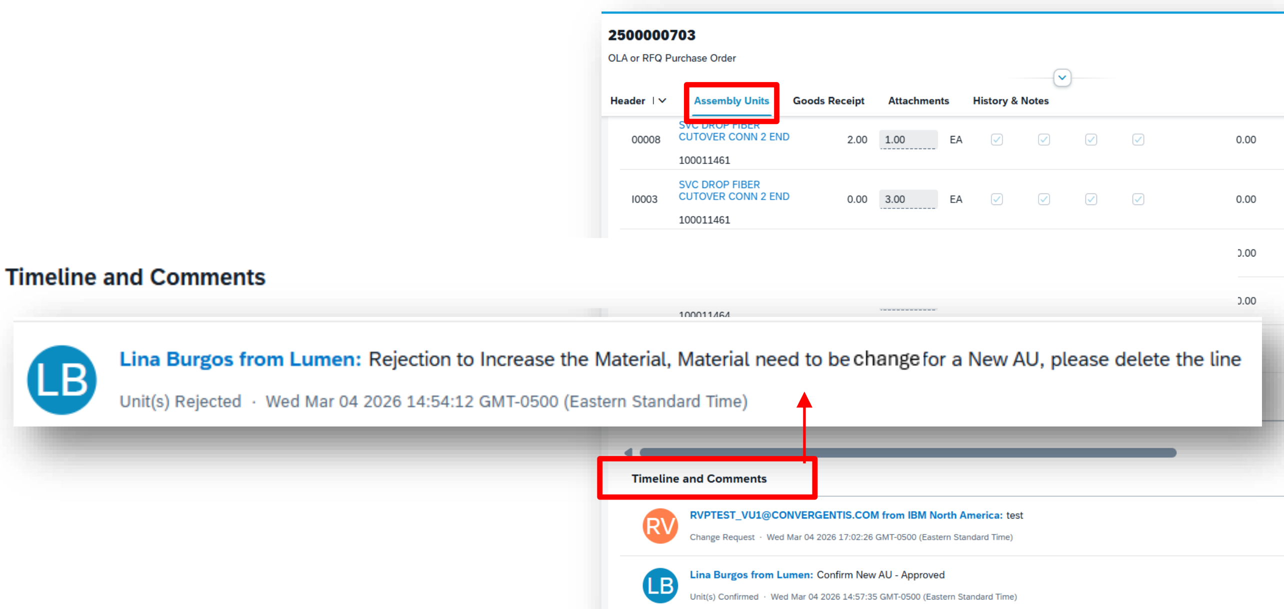


If Lumen rejects, the line returns to the supplier with **Item Status = Pending Supplier – Unit Change**, and the rejection feedback is captured for traceability in the Time & Comments at the Bottom of the table



➢ Review the outcome in **Timeline & Comments** (rejection note).

Use the rejection feedback to either revise and resubmit the requested quantity or withdraw the change by reverting the Requested Qty back to the approved value.



SCENARIO: LUMEN REJECTS THE CHANGE REQUEST AND REQUESTS THAT THE UNITS BE WITHDRAWN FROM THE ASSEMBLY UNIT.

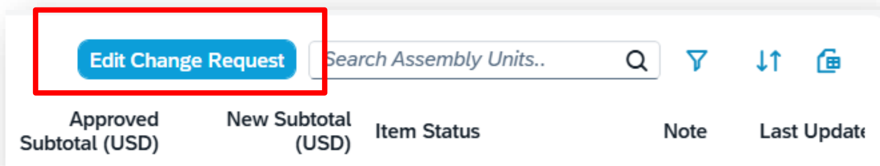
20.6 Withdraw a Change Request

You can withdraw your change request by entering a Requested Qty that is equal to the Approved Qty.

- For NEW and INCR lines (indicated by line numbers starting in N or I), the Approved Qty is 0, therefore you must enter 0 in the Requested Qty column to remove the line and withdraw the change request. This will be the most common scenario.

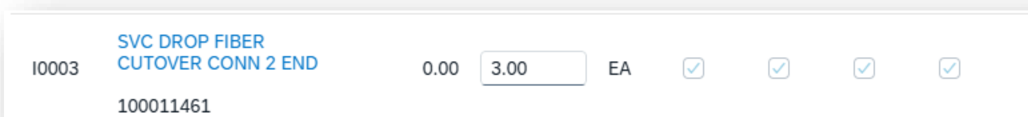
- For existing lines, the Approved Qty is greater than zero, therefore you must enter the same amount as the Approved Qty to withdraw the change request (for example, if the Approved PO Qty is 200, and you first entered a Requested Qty of 100, which Lumen rejected, you can update the Requested Qty field to 200, thereby withdrawing the change request).

➢ From the Assembly Units table toolbar, select Edit Change Request.



The table switches back to **edit mode**.

➢ Locate the Line that was rejected and needs to be removed.



➢ In the **Requested Qty** column, enter **0** for the line to be removed.

➢ Then select **Submit Change Request** in the top-right of the table (as performed earlier).

A Message Window is displayed with "Requested and Approved quantities are the same. This will be automatically confirmed and the pending change request withdrawn".

➢ Click Continue

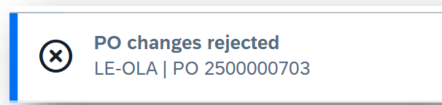
Once the change is submitted and approved, and the PR/PO sync is completed, the line is marked for deletion at the back end. The PO line is then removed from the Assembly Units table.

Note: These same steps apply to both removing an approved line item and withdrawing a change request.

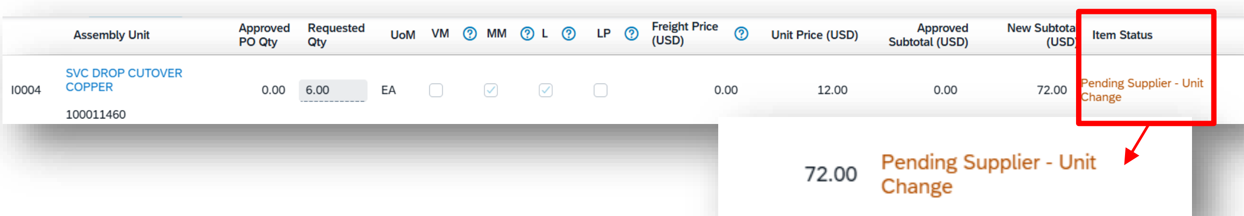
SCENARIO: LUMEN REJECTS THE CHANGE REQUEST AND ASKS FOR THE REQUESTED QUANTITY TO BE REVISED

Note: Follow the same steps as in "Reduce the existing AU".

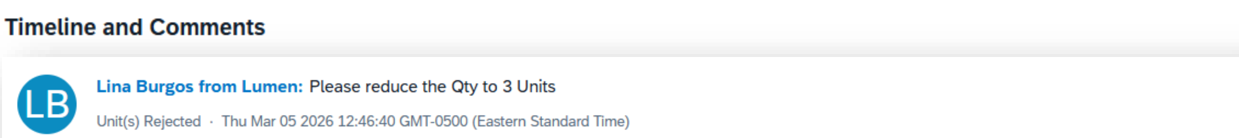
- Select **Message Center**, then open the message related to the PO Change Request rejection. The system redirects directly to the specific PO that requires attention. Then, click on the Assembly Units Tab.



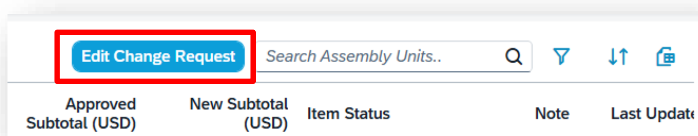
If Lumen rejects, the line returns to the supplier with **Item Status = Pending Supplier – Unit Change**, and the rejection feedback is captured for traceability in the Time & Comments at the Bottom of the table.



- Review the outcome in **Timeline & Comments** (rejection note).
- Use the rejection feedback to either revise and resubmit the requested quantity or withdraw the change by reverting the Requested Qty back to the approved value.



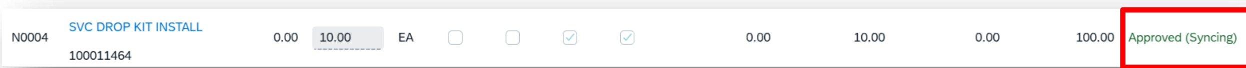
- Select Edit Change Request



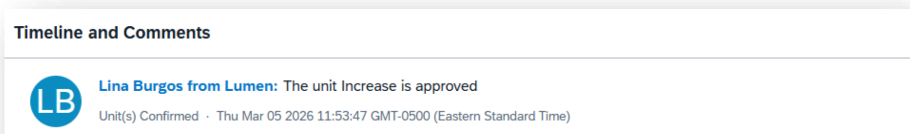
- Locate the AU line that requires a reduction, enter the **Requested Qty by Lumen** in the **Requested Qty** field, then press **Enter** to apply the change. Review the recalculated values on the line, including the updated **New Subtotal**, then select **Submit Change Request**.

20.7 Lumen Approves a Change Request

After a Change Request is submitted, Lumen reviews the request for confirmation. If confirmed, the line moves forward through approvals and synchronization. During this time, the table reflects the progress through **Item Status** updates, first **Approved (Syncing)**, then **approved** once synchronization is complete.



- Review the outcome in **Timeline & Comments** (rejection note).



Once the line item is **approved** and the work is complete, proceed with the **Goods Receipt**.

20.8 Pending Financial Approval

When Lumen confirms a line item, financial approval may still be required (LE) Lumen can confirm a line-item change, but if the change increases the PR/PO value beyond the allowed tolerance or exceeds available budget, the line does not go straight to sync. Instead, it can move into **Pending Financial Approval** (EFAA workflow). Any increase must also pass the commitment control (budget) check; if the budget is insufficient, the change is blocked until the budget issue is resolved.

- *Budget tolerance rules (when Financial Approval is triggered)*

  - For PR values below $10,000, the allowed tolerance is $1,000.
  - For PR values between $10,000 and $199,999, the allowed tolerance is 10% of the PR value.
  - For PR values greater than $200,000, the allowed tolerance is $20,000.
  - For existing purchase orders converted from BidMaster, the tolerance is 0; any change requires approval.

- *Item Status workflow through Financial Approval → Sync → Ready for Goods Receipt*

After a line item is sent for financial approval, it progresses through this Item Status sequence until it becomes eligible for execution (Goods Receipt):

- **Pending Financial Approval** – The line is in the EFAA workflow and cannot be edited while approval is pending.
- **Approved (Syncing)** – Financial approval is completed, and the change is queued for PR/PO synchronization.
- **Approved** – Synchronization is complete, and the updated values are reflected on the PO line.
- **Ready for Goods Receipt**: After the work is performed, proceed to the Goods Receipt tab and post the completed quantities. In the GR tab, a line must be Ready to be processed; Blocked lines have an active change request in progress, and Completed lines have already been finalized.

Related statuses (exceptions):

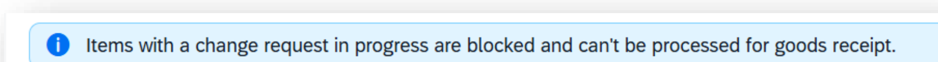
- **Budget Error**: The change failed the budget/commitment control check.
- **EFAA Rejected**: The approver rejected the financial approval request.
- **Pending Supplier – Unit Change**: Lumen rejected the unit change and returned it to the supplier for correction and resubmission.
-

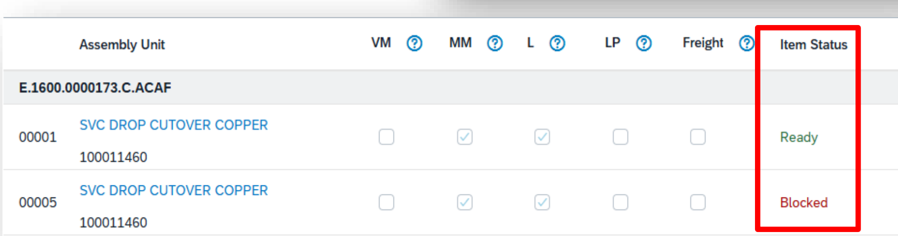
21. Goods Receipt Tab – Old CUPS – Deep Dive

Use the Goods Receipt tab to record work completion against the Assembly Unit (AU) line items on the PO. Good Receipt supports partial goods receipts, meaning a single AU line can be receipted in multiple submissions over time as work progresses. This is allowed so that work that is already completed can be confirmed immediately, and the job does not have to be 100% finished before progress is recorded.

21.1 Change Request impact (Blocked lines)

When a PO is in **CR In Progress**, the tab displays an information message indicating that items with a change request in progress are blocked and cannot be processed for goods receipt.





Ready = GR can be entered and submitted for the line.

Blocked = a change request or Sync is in progress

- *Good receipt Item Status:*
  - **Ready** – the line is available for Goods Receipt processing.
  - **Blocked** – a PO Change Request is in progress for the line, so it can't be processed for Goods Receipt.
  - **Completed** – the line has been marked complete (final delivery), so it can't be processed for additional Goods Receipts.

- *The Table includes these Columns:*

Each row represents an AU line item and displays the fields needed to confirm work:

  - **Assembly Unit** (AU description + AU number below it)
  - Component indicators shown as checkboxes: **VM**, **MM**, **L**, **LP**, **Freight** (displayed as read-only indicators of what components exist on the AU line)
  - Item Status
  - Approved PO Qty
  - Completed Qty
  - Remaining Qty
  - **Qty to Complete** (editable when the line is Ready)
  - **UoM** (example shown: EA)
  - **Work Unit Completed** (checkbox used to indicate final delivery / no further quantity expected)

21.2 Validations and completion behavior (what the system enforces)

The system prevents incorrect postings and controls final delivery:

  - **Over-posting is not allowed**: Qty to Complete must be **≤ Remaining Qty**; if it is higher, the system returns an error and prevents submission.

  - If Qty to Complete = Remaining Qty, the system automatically checks Work Unit Completed.
  - If **Work Unit Completed** is checked while Completed Qty is still less than Approved PO Qty, the system triggers an automatic PR/PO update, so GR/Invoice/PR/PO quantities remain aligned (no Lumen approval required for that reduction).

  - Lines with **Completed** status are disabled to prevent further GR submissions, and **Blocked** lines are disabled to avoid conflicts with Change Requests.

Scenario: As work is completed on the job, submit a partial Goods Receipt to record the quantities completed to date.

21.3 Partial Goods Receipts (how it works and why it matters)

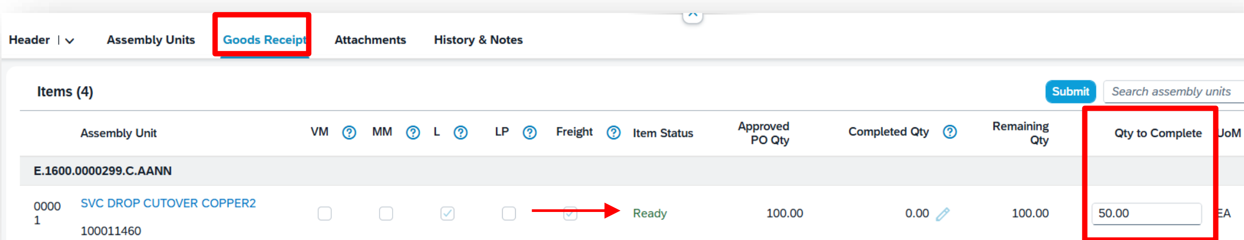
Partial GR is enabled by the quantity tracking fields on the screen:

- **Approved PO Qty** is the total quantity on the PO line.
- **Completed Qty** shows the quantity already marked as **work complete** through Goods Receipts.
- **Remaining Qty** shows the quantity still **pending work** and not yet confirmed through Goods Receipts.
- **Qty to Complete** is the quantity entered for the **current** GR submission.

Because partial GR is supported, **Qty to Complete** can be less than the Remaining Qty, allowing repeated submissions until the line is fully completed.

This confirms progress on the completed AU lines while leaving the remaining quantities open for future Goods Receipts as the rest of the work is finished.

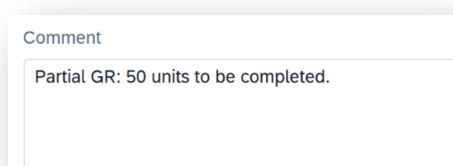
- Open Manage Purchase Orders, locate the target PO, open it, then go to the Good Receipts tab. Select a line where **Item Status** is **Ready**, then locate the **Qty to Complete** Column. Confirm that the field is editable, then enter the partially completed quantity.



When submitting a **Goods Receipt**, use the **Comment** field to document what was completed in that GR (what work was finished, what portion is being confirmed, any job context). Once the GR is posted, those receipted quantities become the basis for invoicing, **and invoices are created from completed GR quantities**.

From a process-traceability standpoint, PGW treats GR as the "work complete" event that drives invoicing readiness: the **POs Ready to Invoice** count is based on POs with at least one line-item **that has been goods-received but not yet invoiced**.

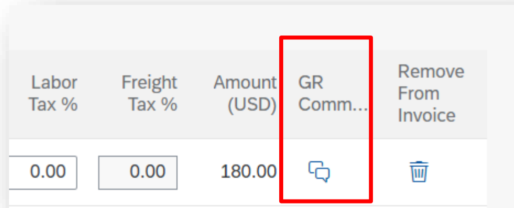
- At the bottom of the screen, locate the **Comment** section and enter clear Good Receipts (GR) comments.



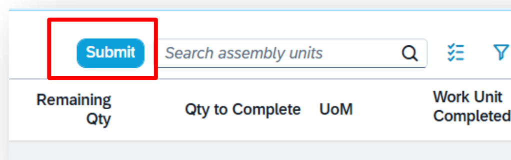
If a Goods Receipt is submitted for multiple lines, the GR comment is carried forward to each line when Submit Invoices is run. Since invoices can reflect quantities from different GR submissions, each line can display a different comment depending on which GR entry created the receipted quantity.

Note: **Comments column**/area tied to the receipted work (so the GR → invoice trace is visible without re-explaining the job each time).

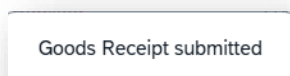
On the invoice, the GR comment is indicated by a **Message icon**, showing that the comment is carried forward and visible.



➢ Select **Submit** in the top-right of the table.



After submission, a toast message appears at the bottom of the screen.

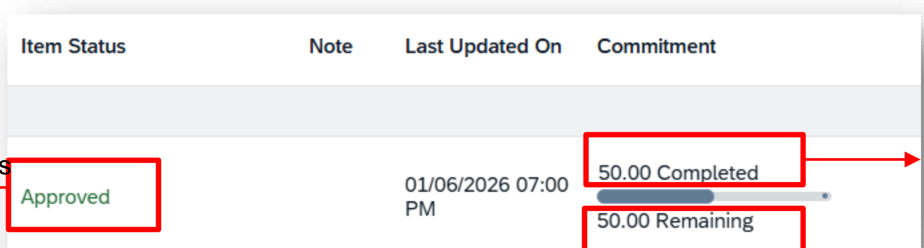


- *The Commitment chart for the Assembly Units tab*

As reviewed earlier, **Commitment** is a column in the **Assembly Units** tab. It provides an at-a-glance visual summary of the same quantity execution data used in the **Goods Receipt** tab.

Note: Use the Goods Receipt tab to post quantities; use the Commitment chart as the at-a-glance indicator of how much of each AU line is Completed versus Remaining after GR postings.

All the Units are Full Approved



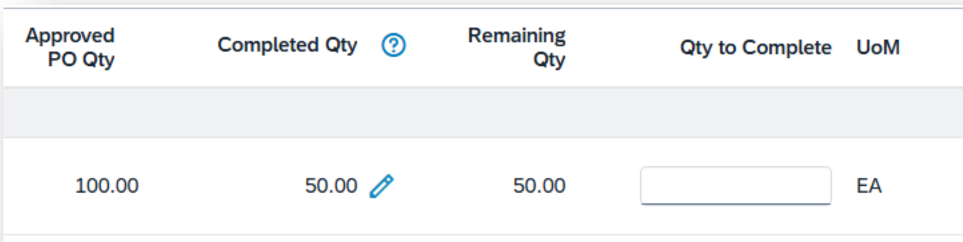
50 units are complete, and the Goods Receipt has been posted.

50 units remain to be posted as **work complete**.

21.4 Reverse Goods Receipts (how it works and why it matters)

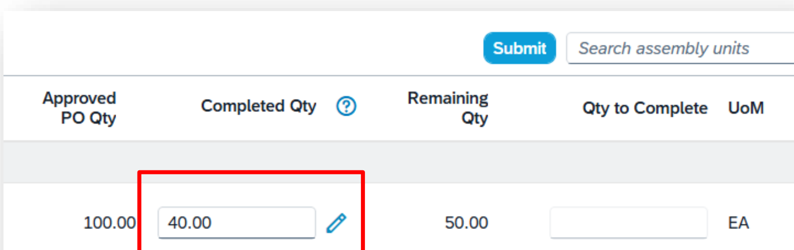
The Reverse Goods Receipt (Reverse GR) process is used to reverse a previously posted Goods Receipt when a quantity was received in error or needs correction. Reversing a GR reduces the Completed Qty and increases the Remaining Qty on the affected AU line, restoring the line to the correct execution state so the right quantity can be posted again later. This keeps the PO execution record accurate and aligned with the actual work performed.

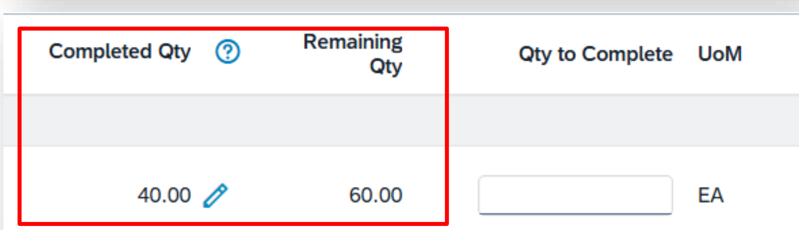
Reverse GR follows the same execution controls as GR: only eligible lines can be processed, and the correction should be performed before continuing with additional receipts and invoicing activities to ensure quantities remain consistent across the PO line and its progress tracking.



- Open Manage Purchase Orders, locate the target PO, open it, then go to the Good Receipts tab. Then locate the **Qty Complete** Column. Click the pencil icon next to the completed quantity to enter edit mode.

- Enter the updated **Completed Qty** (for example, to reverse **10** out of **50**, enter **40**). Enter the quantity that is truly finished so the system can calculate and apply the reversal correctly. Then select **Submit**



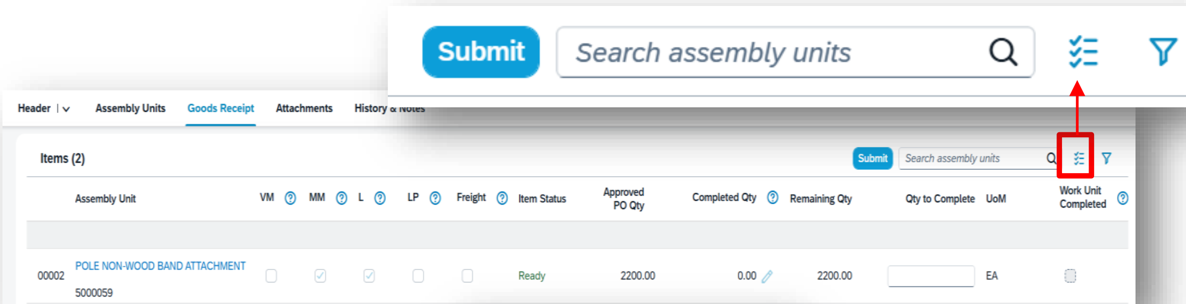


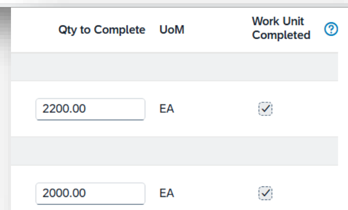
After the reversal, **Completed Qty** is **40** and **Remaining Qty** is **60—10** units were reversed.

21.5 Complete Goods Receipt for All Line Items

Multiple GR submissions per line are allowed, so progress can be recorded over time until the AU line is fully complete. Once quantities are recorded as goods received, they represent work completed in the system and serve as the basis for invoicing readiness.

- ➢ On the Goods Receipt tab, click the Complete All button located in the top-right area of the table, next to the Search Assembly Units field (icon with three lines and check marks).

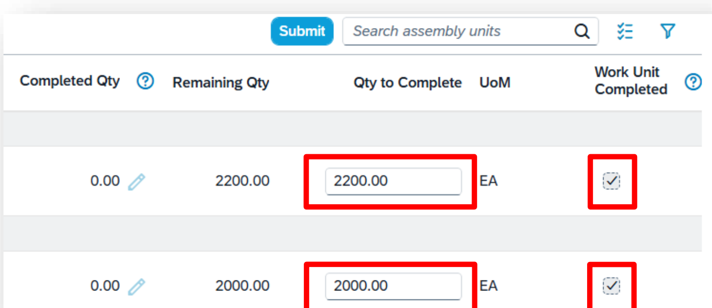




This action automatically populates the total item quantity in the Qty to Complete column for each enabled line item.

Alternatively

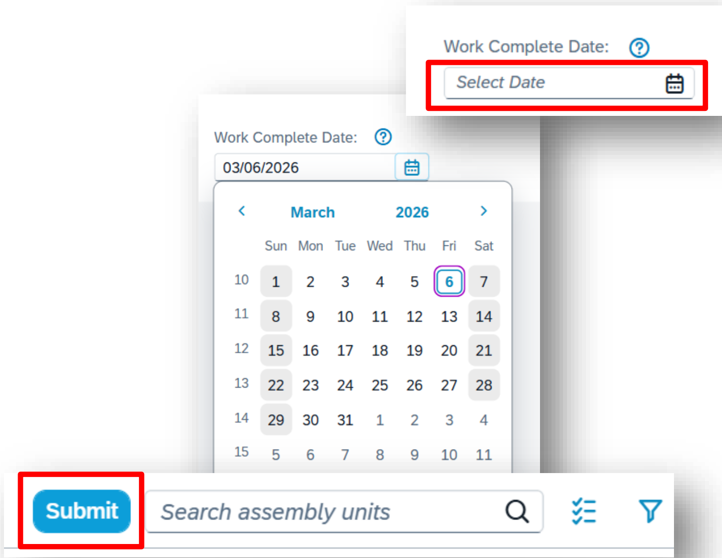
- ➢ Enter the total item quantity in each Qty to Complete field and select each checkbox under the Work Unit Completed column to mark the line items as complete. Then



Selecting the Work Unit Completed checkbox indicates that this will be the final goods receipt for this line. Entering a Qty to Complete that is equal to the Remaining Qty will automatically check the Work Unit Completed checkbox.

The system automatically navigates from the Goods Receipt tab to the Attachments tab. If no documentation is required, or after attaching the documentation, return to the Goods Receipt tab and verify that all dates are calculated and displayed correctly on the screen.

- **Click OK** to dismiss the message.
- Before submitting the final GR, enter the date in **the Work Complete Date field at** the bottom-left of the screen. Future dates are not allowed. Then **Click Submit**



Once the GR is submitted, the Work Unit Completed checkbox becomes locked and cannot be unchecked. If additional quantity is needed later, the supplier must submit a formal change request to Lumen.

All line items in the Item Status column are updated to Completed.

- Validate Documentation Due Date (15 Calendar Days after Complete Date)

Defines the deadline by which all required supporting documents must be submitted. This date is set to 15 days after submission and represents the timeframe required by Lumen to complete necessary inspections, as-builts, paperwork, and restorations to be completed (for example, Bill of Lading, Packing List, certificates)

- Validate Invoice Submission Due Date (60 Calendar Days after Complete Date)

The displayed Invoice Submission Due Date matches the expected 60-day calculation. This date is the deadline set by Lumen for submitting all invoices related to the Purchase Order to avoid penalties.

ALL WORK IS NOW FULLY COMPLETE, AND THE PO IS READY FOR FINAL INVOICING. TO CREATE AND REVIEW INVOICES, CONTINUE TO MODULE 7 – SUBMITTING AND VIEWING INVOICES.