6. Purchase Orders for Awarded RFQs

1. Module Overview

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

In this guide, you will learn how to manage awarded RFQ work in PGW from award through execution. You will start by reviewing the awarded Purchase Order (PO), continue through scope updates and progress tracking, and finish 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 Center notifications, and History & Notes to keep your work accurate, visible, and traceable.

This training focuses on the actions you perform directly in PGW and explains the Lumen approval points that can affect your next step, such as PO Change Request approvals, Procurement price review, budget and tolerance-based financial approvals, and invoice-related outcomes.

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 invoicing, so you can interpret the system's output and complete each step correctly.

PGW Applications and Page Areas

- **Manage Purchase Orders (MPO)**

Application you use to search, open, and manage purchase orders in PGW, including awarded LE RFQ POs in the OLA/RFQ tab.

- **OLA / RFQ Tab**

RFQ (Request for Quotation) = LE bid-based construction
This is the tab you use after you have won the bid, your quotation has been awarded, and Lumen has created and assigned the PO to you. From this point forward, you manage the awarded RFQ work through Manage Purchase Orders.

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

The filter area above the table is used to narrow your results. The PO list refreshes 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 the POs returned by your filter criteria, allowing you to open a PO, review its details, and take action.

LE Purchasing and Scope Objects

- **RFQ (Request for Quotation)**

The bid process Lumen used to request pricing for the work. In this module, the RFQ is already complete, and the work has moved into the purchase order stage.

- **Quotation**

The pricing response you submitted during the RFQ process. Once your quotation was selected, Lumen used it to create the PO you now manage in PGW.

- **Purchase Order (PO)**

Execution document created in SAP S/4HANA and delivered to PGW after your quotation is awarded. You use the PO to review the awarded scope, request changes, update progress, submit Goods Receipts, and continue to be invoiced.

- **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).

- **Supplier Received**

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

- **Net-New AU**

A new assembly unit that was not included on the original PO. In an awarded RFQ PO, you may add a net-new AU and submit pricing for it as part of a change request.

- **Procurement Contact**

The Lumen contact shown on the PO header who published the RFQ and who becomes involved when newly added work requires pricing review.

- **Responsible Person**

The Lumen contact is responsible for reviewing and confirming your requested work changes to the PO, such as adding or removing units or changing quantities.

- **Items Pending**

Landing-page field that helps you identify POs that still require action, based on line items that are pending with you or pending with Lumen.

- **Due Date**

The target completion date is used for schedule tracking on the PO.

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

Date you maintain to communicate when you expect the work related to the PO to be completed.

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 RFQ POs, there is no initial supplier confirmation step after PO creation.

- **Job Status**

Work-in-progress status, you update to communicate execution progress on the PO.

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

Additional details that can be recorded for certain Job Status values when a more specific explanation is needed.

Change Request (CR) Terms

- **PO Change Request (CR)**

Request you submit in PGW to change the awarded PO scope. For RFQ-based POs, this can include adding net-new AUs, removing AUs, changing quantities, and submitting pricing for newly added work.

- **Pending Financial Approval**

Line status indicates the change has passed the required unit and price reviews and is now awaiting budget and/or EFAA approval.

- **Budget Error**

Line status showing the requested change did not pass the commitment control budget check and must be resolved before the approval flow can continue.

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

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

- **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 you make in PGW to confirm completed work quantities at the AU line level.

- **Completed Qty**

Cumulative quantity of goods already received for the AU line.

- **Work Unit Completed**

Line-level checkbox used to indicate that no further quantity is expected for that AU line. It is used for the final delivery on that line.

- **Work Complete Date**

Date when the LE work is fully completed as part of the final Goods Receipt.

- **Partial GR / Final GR**

You can submit multiple partial Goods Receipts over time. The final GR closes out the remaining quantities.

- **Under-Delivery**

If your final GR is lower than the approved PO quantity, the system can automatically update the PR/PO to keep the GR, invoice, PR, and PO quantities aligned.

- **Reverse GR**

Action is used to reduce the previously posted complete quantity when a correction is needed, and the related quantity has not already been invoiced or is not awaiting invoice approval.

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).

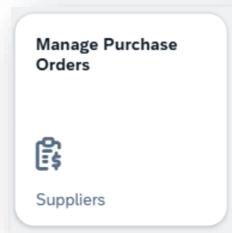
2. LE Construction “Manage Purchase Orders” Process Overview (OLA/RFQ Tab)

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 RFQ Bid → Award → Execution Flow

3.1.1 You are invited to participate in an RFQ process

(Module You receive an invitation to participate in an **RFQ (Request for Quotation)** process. During this stage, you review the RFQ details, the requested scope of work, the Assembly Units (AUs), and any supporting attachments provided by Lumen. You enter your quotation by completing the required pricing fields for the bid and submitting your response before the RFQ deadline.
Refer to Module 5. Respond to RFQ Invitations (Bid Process)

3.1.2 Lumen reviews the quotations and awards the work

After the RFQ closes, Lumen reviews the submitted quotations and selects the awarded supplier. If your quotation is selected, Lumen creates the Purchase Order (PO) in SAP S/4HANA and assigns it to you in PGW. From that point forward, you no longer work in the RFQ response process. You now manage the awarded work through **Manage Purchase Orders (MPO)** in the **OLA/RFQ** tab.

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

You receive the awarded 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 awarded PO scope has been approved and that the PO is eligible for **Goods Receipt (GR)** submission, subject to line-level rules.

3.1.4 Review of the awarded PO scope and 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).
- They are the lines affected when you submit a Change Request.

In awarded RFQ POs, the AU lines continue to reflect the RFQ-based structure and may include pricing components such as **Vendor Material (VM)**, **Minor Material (MM)**, **Labor (L)**, **Locally Purchased Material (LP)**, and **Freight**.

3.1.5 Submit a Change Request when the awarded scope needs to change

If the awarded scope needs to change during execution, you submit a PO Change Request from the PO. In awarded RFQ POs, you may use the Change Request process to:

- Add net-new AUs,
- Remove AUs by reducing the quantity to 0, or
- Increase or decrease AU quantities.

For newly added work, you may also be required to submit pricing for Procurement review.
Once submitted:

- *PO Status = CR In Progress*

The PO can contain a mix of item-level statuses, meaning some lines may be pending with you while others are pending with Lumen. While the PO is in CR In Progress, GR is allowed only for items not included in the Change Request.

Your request is reviewed through the RFQ-based confirmation and approval flow, which may include:

- Lumen Responsible Person confirming changes to units or quantities,
- Procurement Contact confirming pricing for newly added or amended work,
- Commitment Control Budget Check, and
- EFAA financial approval, if required by tolerance.

When approvals are complete and the PR/PO sync finishes, the PO returns to:

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

And you continue execution on the updated approved scope.

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

As you perform work, you update the Job Status (and optionally the 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).

3.1.7 Submit Goods Receipts (GR) for completed work

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

- Completed quantities per AU line,
- Completion indicators when applicable,
- Comments for the GR submission, and
- Work Complete Date when the work is fully completed.
- GR supports multiple partial submissions as work progresses. This means you can submit completed quantities over time rather than waiting until the entire PO scope is complete.

3.1.8 Final GR completes the awarded execution cycle

When the work is complete, you submit the final GR using the remaining quantities and the Work Complete Date. This completes the execution portion of the awarded RFQ PO and prepares the process for invoicing and closeout.

4. Before starting, review these key concepts used in awarded RFQ Purchase Orders in PGW: your execution PO, Assembly Units, the View Lumen Material POs tile, and the PDF copy of the PO.

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

When you work in **Manage Purchase Orders (MPO) → OLA/RFQ**, you are working on the awarded RFQ Purchase Order that Lumen created and assigned to you after your quotation was selected. This is the PO you use to manage the awarded work in PGW, including:

- reviewing the awarded scope in the Assembly Units tab
- submitting PO Change Requests when the awarded scope needs to change
- submitting Goods Receipts (GR) for completed work
- maintaining supporting documentation through Attachments
- reviewing traceability in History & Notes

This is your main execution PO in PGW for the awarded RFQ work.

4.2 View Material Purchase Orders Tile: A Separate Tracking for Lumen-Supplied Materials

In some jobs, Lumen may supply material directly. When that happens, Lumen can manage that material through a separate material purchasing document in SAP S/4HANA. In PGW, you can track that document through the View Lumen Material POs Tile.

Key Point:
The PO you manage in MPO is the PO for the awarded RFQ execution. The View Material POs Tile is used to track Lumen-supplied material separately when applicable.

Note: View Material POs 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 for the job. It is the scope container that shows what the awarded work includes. As a result, an AU can display multiple component types, even when some components are not priced or supplied directly by you.

In awarded RFQ POs, the AU can show pricing and component fields such as:

- Vendor Material (VM)
- Minor Material (MM)
- Labor (L)
- Locally Purchased Material (LP)
- Freight

Think of it this way:

- Assembly Units tab = what the awarded job includes

- View Lumen Material POs tile = where you track Lumen-supplied material separately, when applicable

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 cancelled.
  - **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 cancelled.
  - **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).

6. 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.

6.1 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.

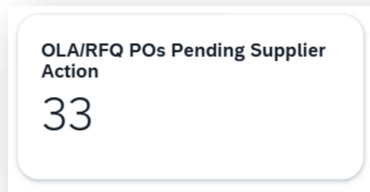
8. How to Access Purchase Orders

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.

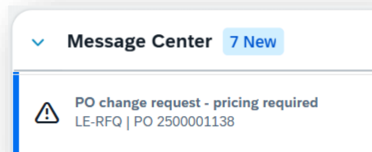
- *Open from the Action Center Tile*

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



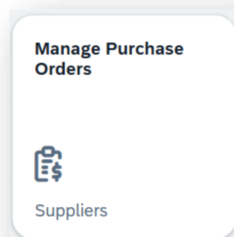
- *Open directly from the Message Center notification*

  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*

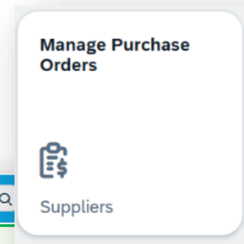
  Use this option to access the **complete list of POs** assigned to you in the OLA/RFQ tab and search using filters



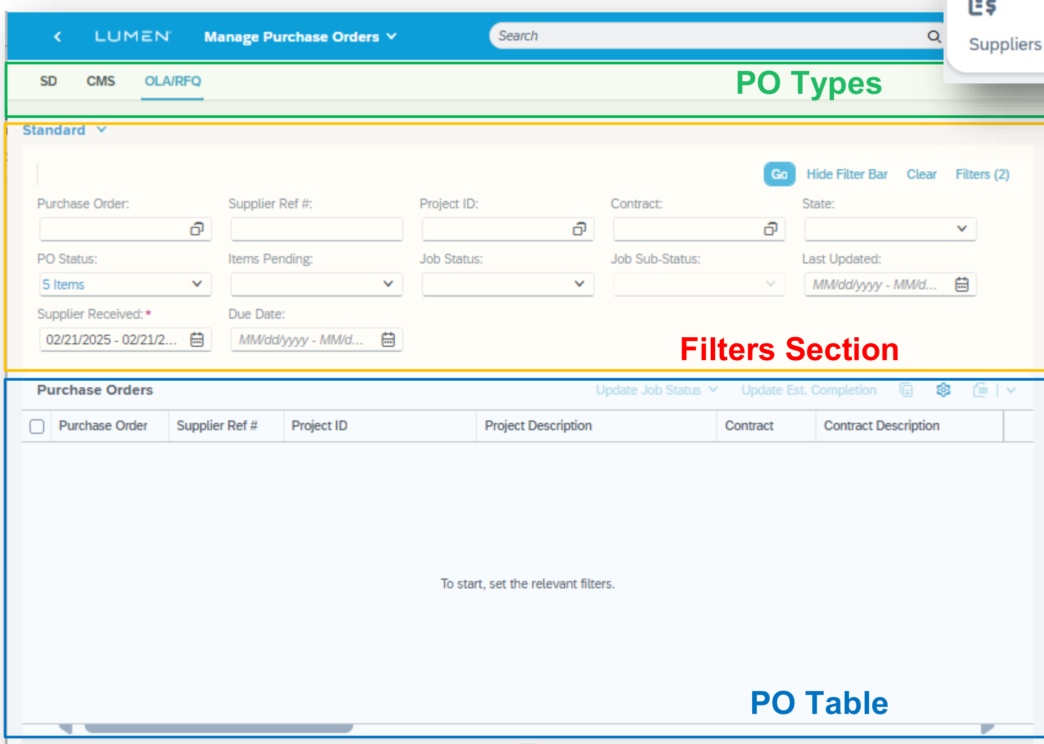
For this training, you will launch MPO from the Manage Purchase Orders Tile so you can access the full list of POs assigned to you in the OLA/RFQ tab. The navigation and process options are the same regardless of whether you open MPO from the Action Center, Message Center, or the Manage Purchase Orders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

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

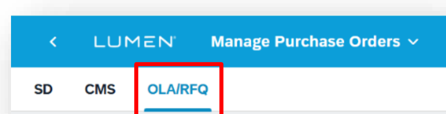
➢ *Click the Manage Purchase Order Tile*



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.

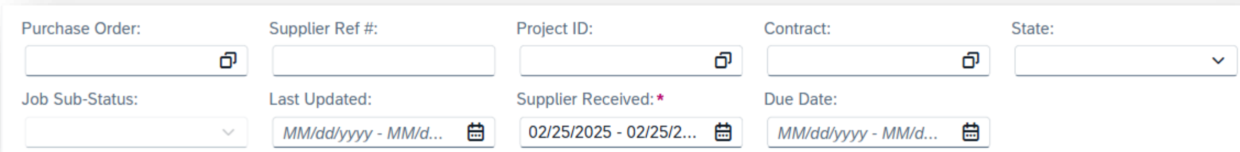


9.1 Filter Section

- ➢ 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.

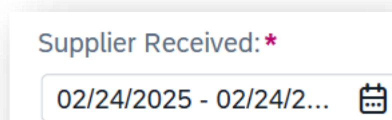
- ➢ To narrow the results, apply a filter (e.g., PO Number, Supplier, or Status), then **click Go** at the top right of the filter section.



The following filters are available from the standard view:

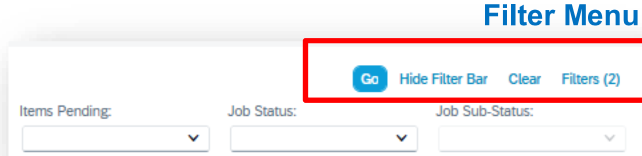
- Supplier Ref #
- Project ID
- Contract
- State
- PO Status (defaulted to exclude Closed POs)
- Items Pending
- Job Status
- Job Sub-Status
- Last Updated
- Supplier Received* (mandatory)
- Due Date

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



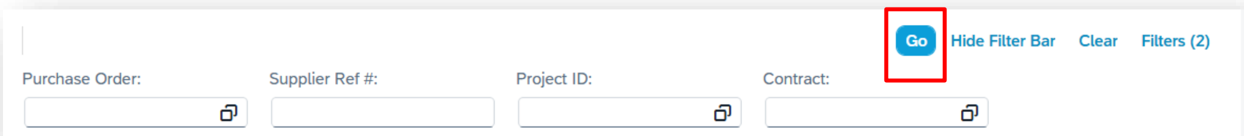
The filters reset, allowing you to perform a new search.

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.

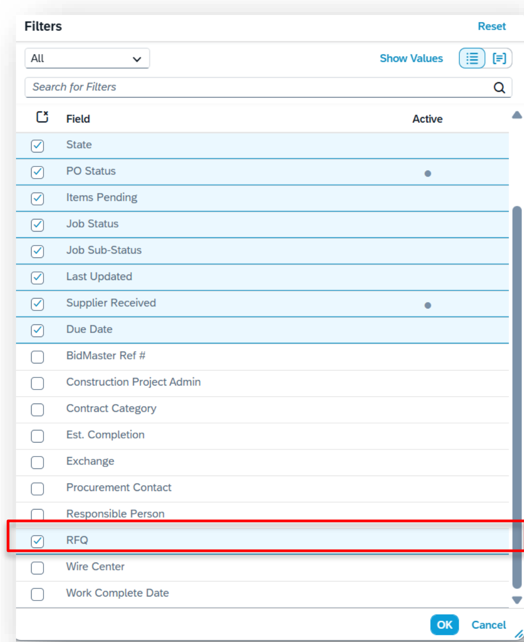
This step relates to the Filter menu section. For complete instructions, refer to: Module 1. Getting Started in PGW: Overview, Login, Preferences, and Navigation. Section: 8.1 Filter Section and Menu (how to return the right records), Page 22



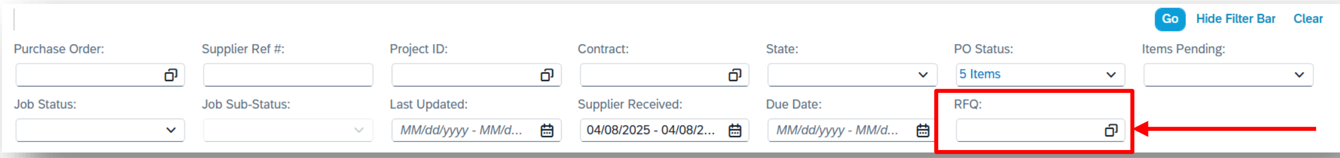
After you select Go, the Purchase Orders table is populated with the POs assigned to your company. Use the columns below to identify the correct PO and understand what action is pending before you open it.

The OLA/RFQ tab displays your line extension construction POs from RFQS as well as those from contracts (OLAs). You may want to set up a custom view that includes only RFQ-based POs.

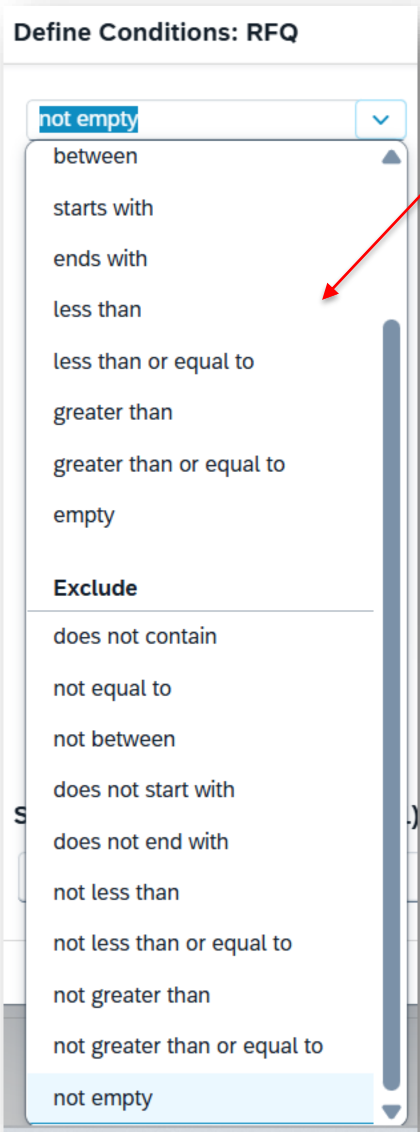
- ➢ Click the Filters button in the filter menu and check “RFQ” to add it to your filter bar.

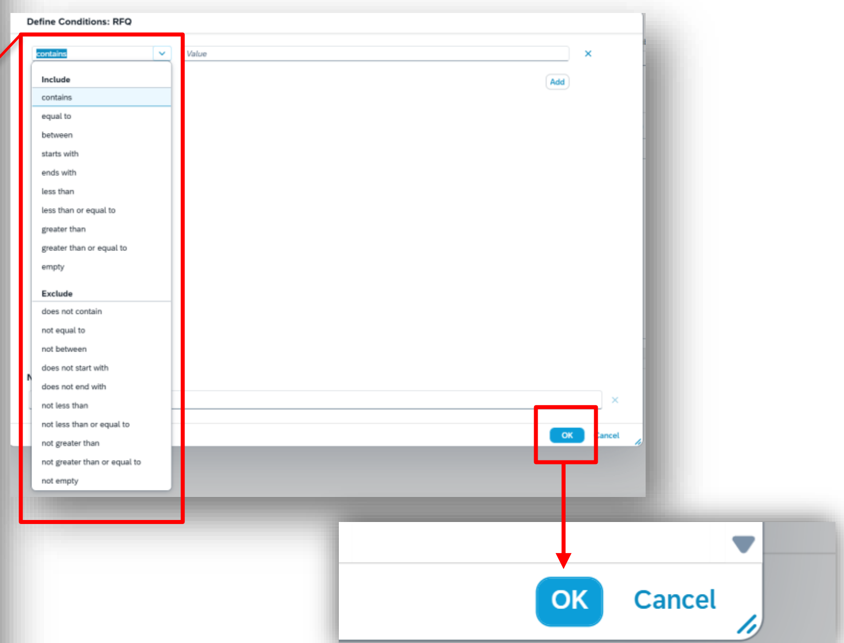


The field is added into the filter section



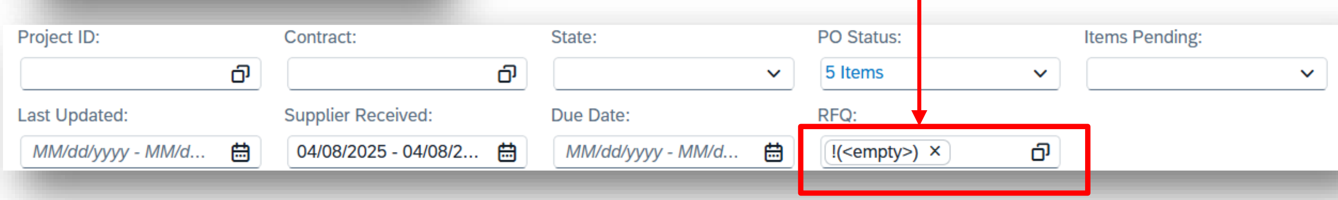
- ➢ Click the value help icon in the filter. Add the "not empty" condition (this ensures that all results have an associated RFQ number).





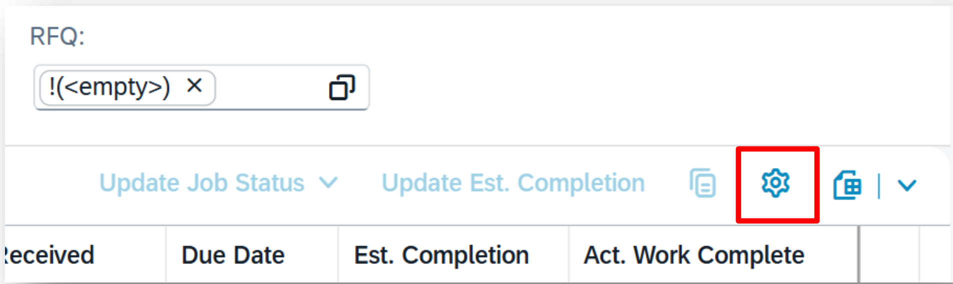
- ➢ Click OK

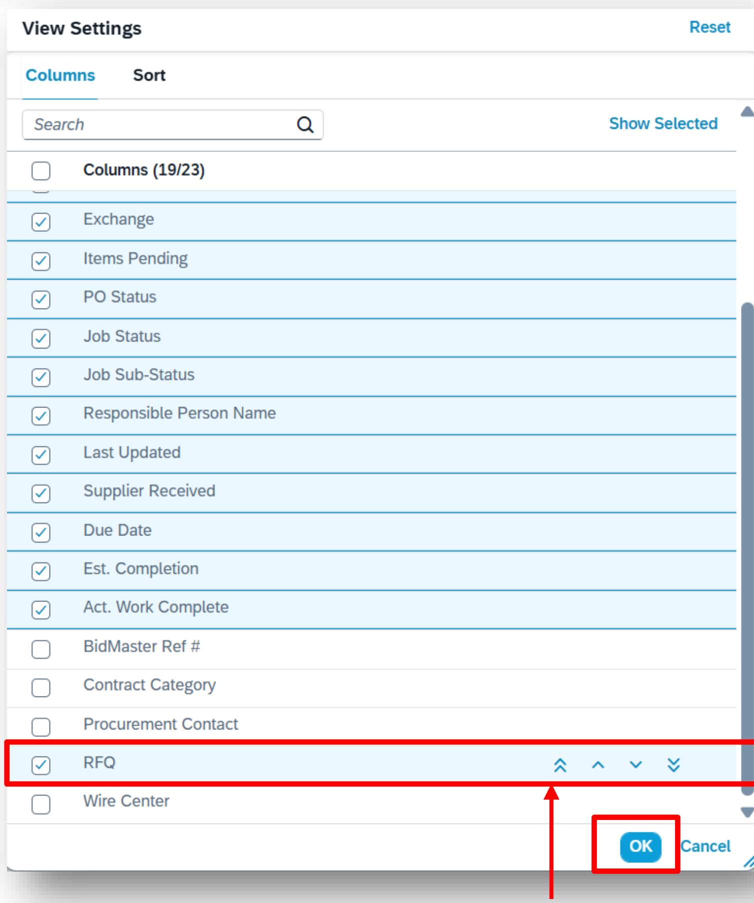
The Condition is populated into the field



The filter is a field-based condition. Make sure you also add the column to the PO table, so the RFQ associated with the Purchase Order is displayed.

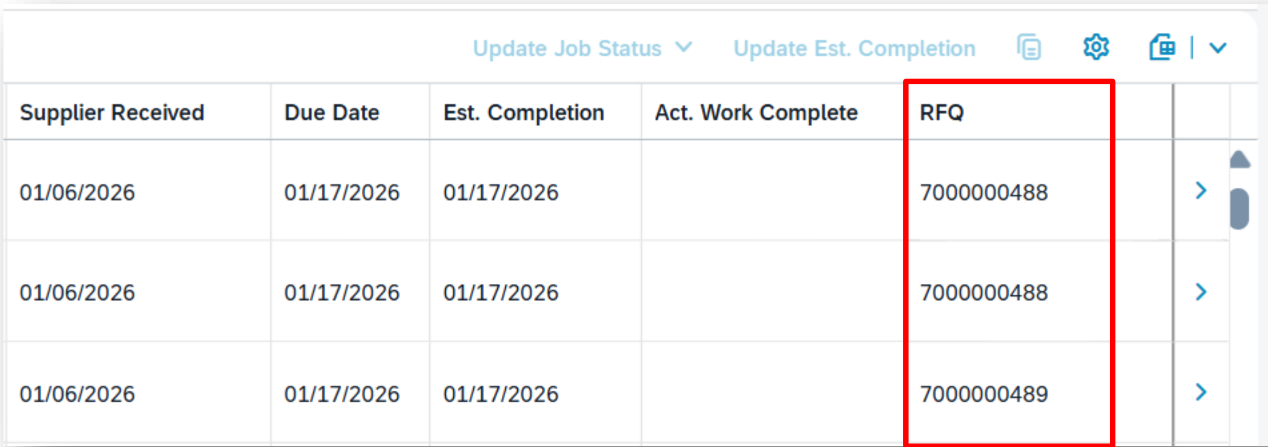
- ➢ Locate the table toolbar at the top-right of the Purchase Orders table, then click the **settings** (gear icon). Check the "RFQ" column to add it. If you want, you can also rearrange the column order so that it is one of the first columns (this ensures you can see it without scrolling).



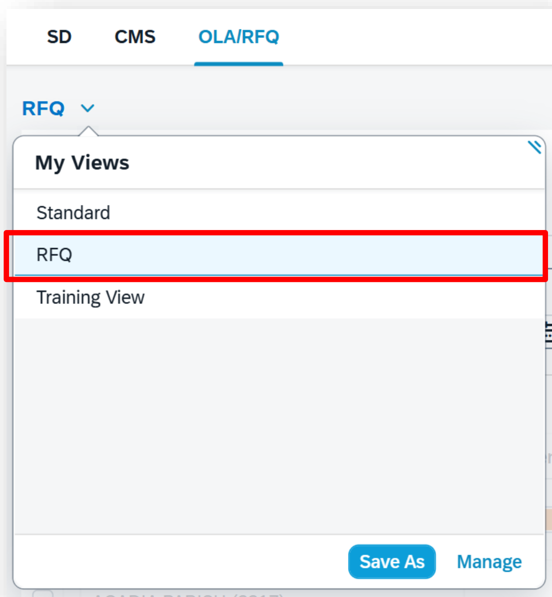


- ➢ Use the arrows to rearrange the column order so that it is one of the first columns and Click Go

➢ Review the columns displayed in the Purchase Orders table



➢ Save your custom view by clicking the down arrow in the top left of the filter area (it will probably say "Standard" for you), give your new view a name, and then Save.

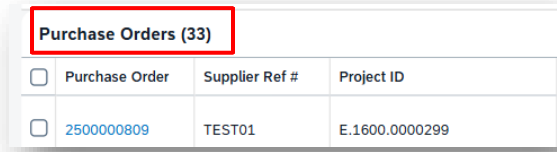


This step relates to Customize your view. For complete instructions, refer to: Module 1. Getting Started in PGW: Overview, Login, Preferences, and Navigation. Section: 9. Customize your view, Page 25

Now you can easily switch between the Standard and your custom RFQ view by toggling between them from the view menu.

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”

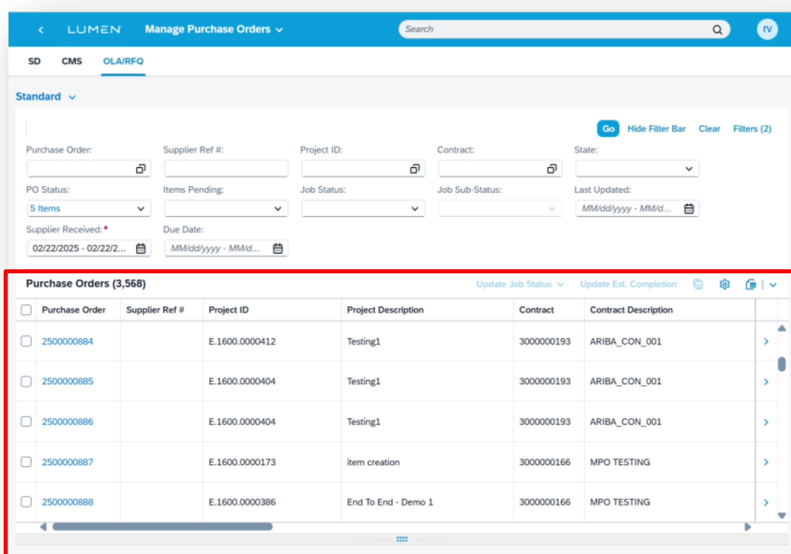


9.2 Column Section

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

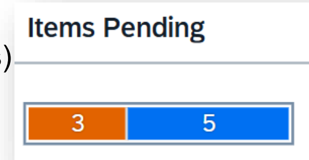
The following columns are included in the standard table variant:

- 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
- RFQ



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)



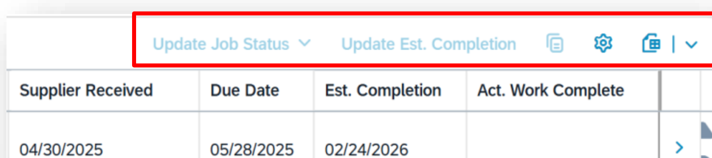
➢ Additional optional columns can be added**. Click the Settings (gear) icon** in the top-right corner of the table.

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

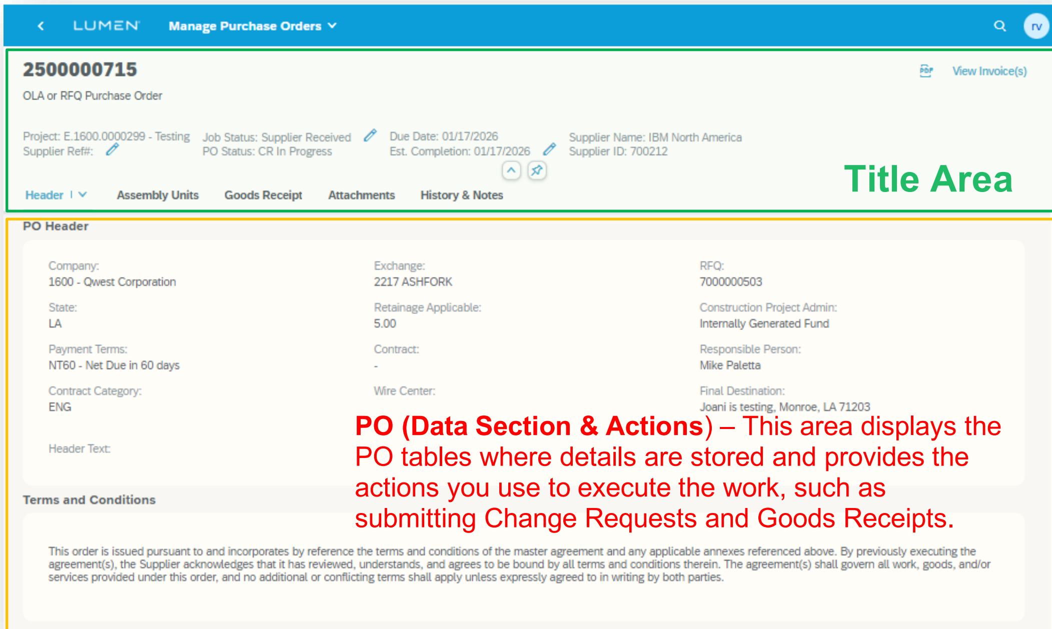


➢ Click the PO number hyperlink or the arrow at the end of the row to open the Purchase Order.

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).

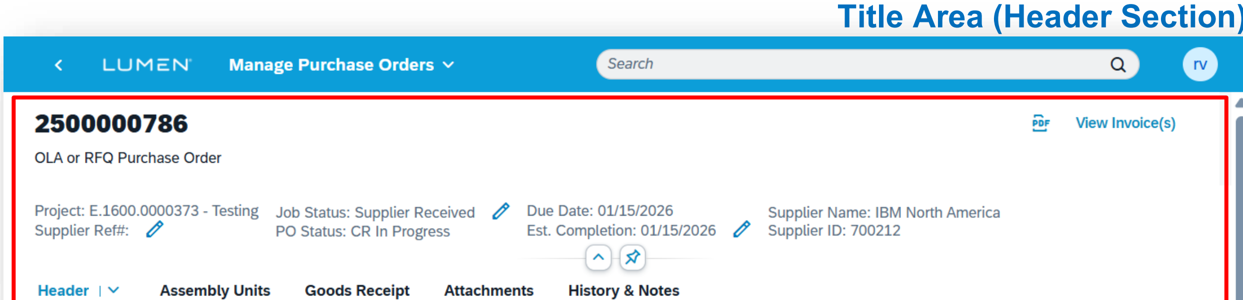
This step relates to the Columns menu section. For complete instructions, refer to: Module 1. Getting Started in PGW: Overview, Login, Preferences, and Navigation. Section: 8.1.3 Table Controls (search, sort, refresh, columns, export)

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).

Title Area (Header Section)



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:

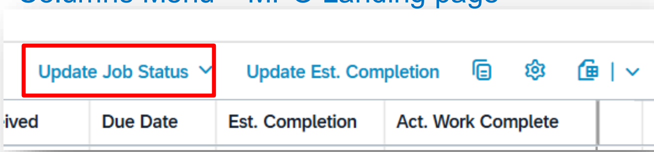
- **Job Status**: provide work-in-progress status updates during execution so Lumen can track progress and understand what is happening in the job.
- **Est. Completion**: Communicate updated completion timing when dates shift during execution.
- **Supplier Ref#**: Maintain your internal reference number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

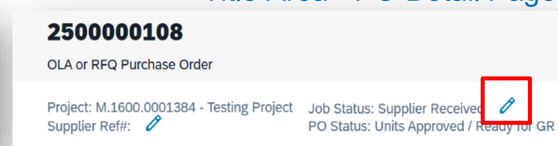
11. Update Job Status Overview

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



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.

- *When the system updates the 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:

- **Canceled 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:

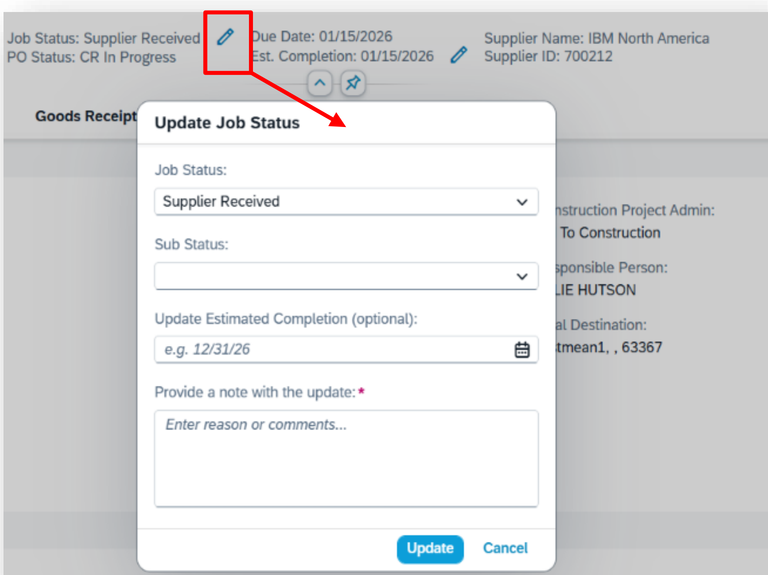
- Daily execution visibility between you and Lumen
- Schedule risk tracking (At Risk / Missed Due Date)
- Controlled closeout progression (Supplier Completed → GR → Invoice)
- Consistent reporting and exception tracking (including delay reason codes and cancellation outcomes)

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

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

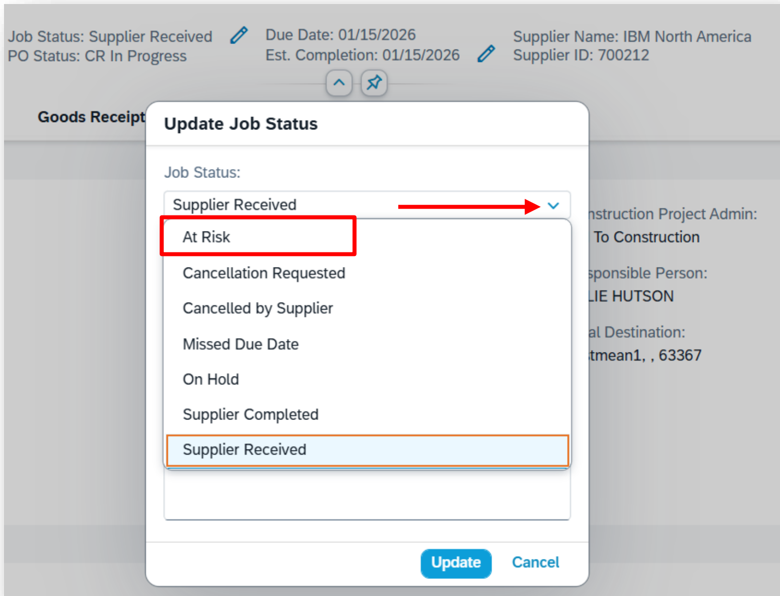
- ➢ In the PO Details Title Area, select the blue pencil next to Job Status.

The system opens the Update Job Status window.



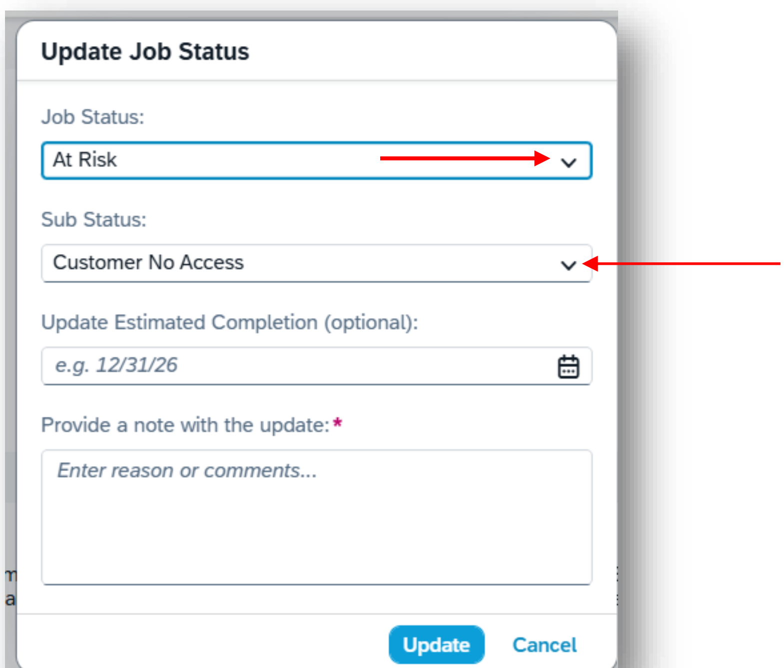
- Use the **Job Status dropdown** to select the appropriate status for the current stage of work.

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



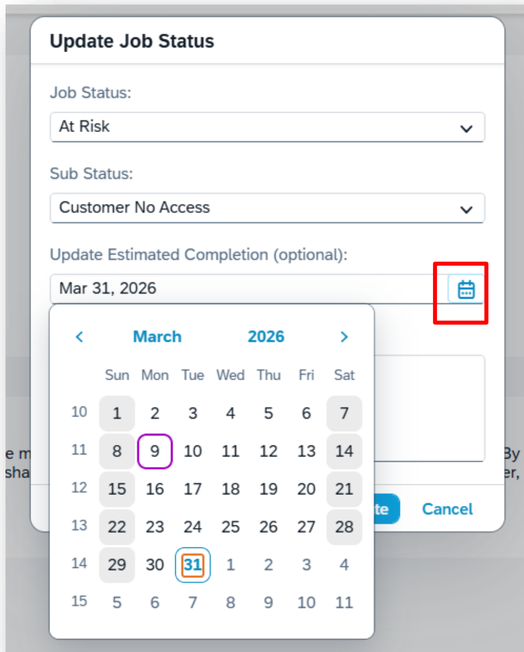
- **Sub Status (when applicable),** If the selected Job Status supports a sub-status (reason code).

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



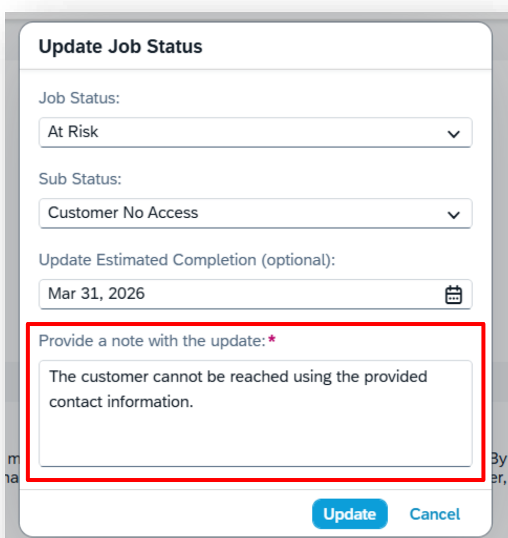
- **Update Estimated Completion (optional).** Even though Estimated Completion is not a Job Status, you can update it from this same window using Update Estimated Completion (optional).

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



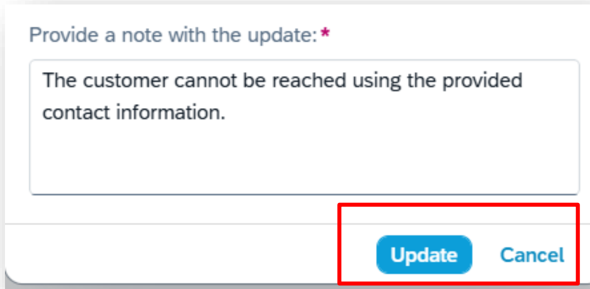
➢ Provide a note with the update (mandatory)

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

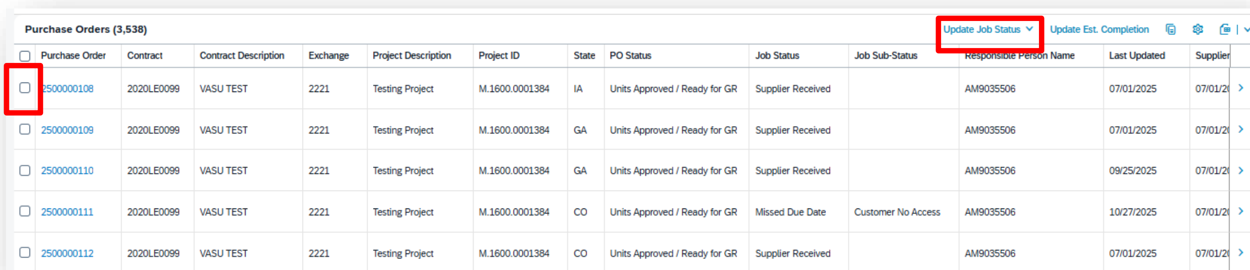
- Select **Update** to apply the changes.
- Select **Cancel** to exit without saving.



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 the 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.

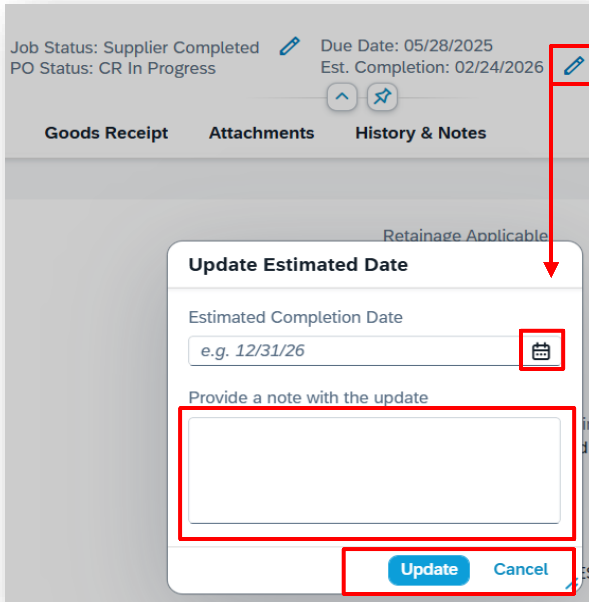
- Select the **Calendar Icon** to choose a new date. This lets you communicate updated timing while you are updating Job Status.

- 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.

.



Note: Updating Estimated Completion Date does not update Lumen's required Due Date**.**

12.2 Update the 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 Orders (3,538) — Update Job Status — Update Est. Completion

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."

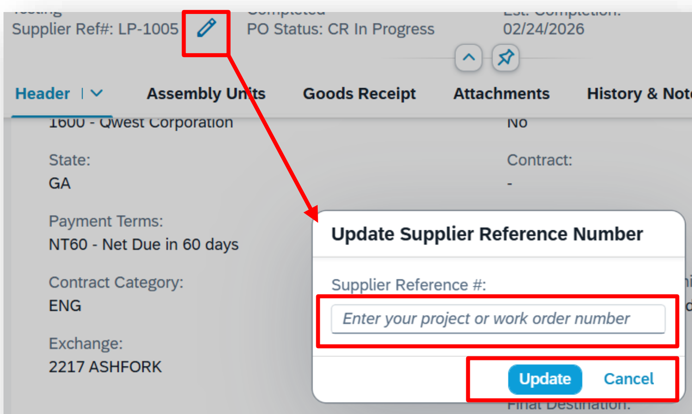
13. Update Supplier Reference

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



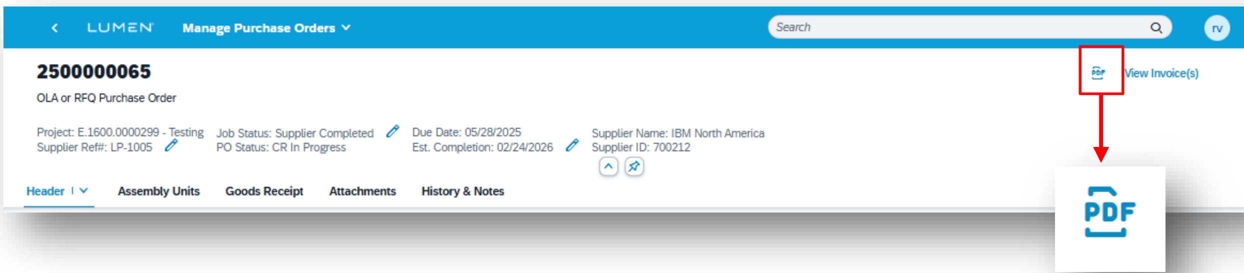
These are the fields you can edit in the Title Area. Other fields may also appear, but they are system-driven and control the PO lifecycle based on automated status logic.

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.

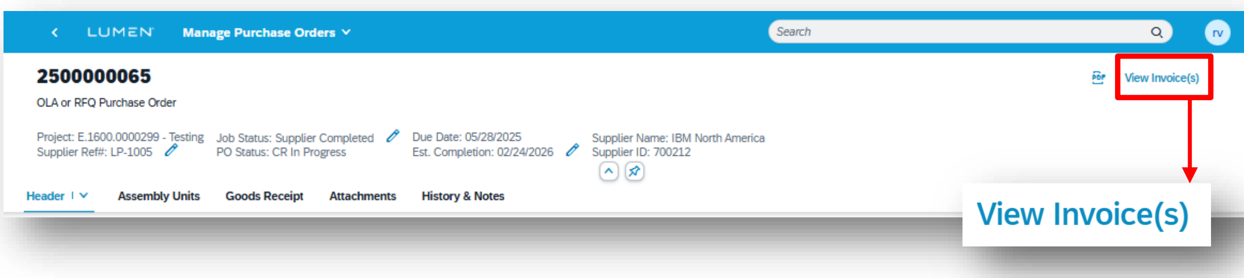
Note: The PDF captures the PO information as it was displayed when you downloaded it.

➢ 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

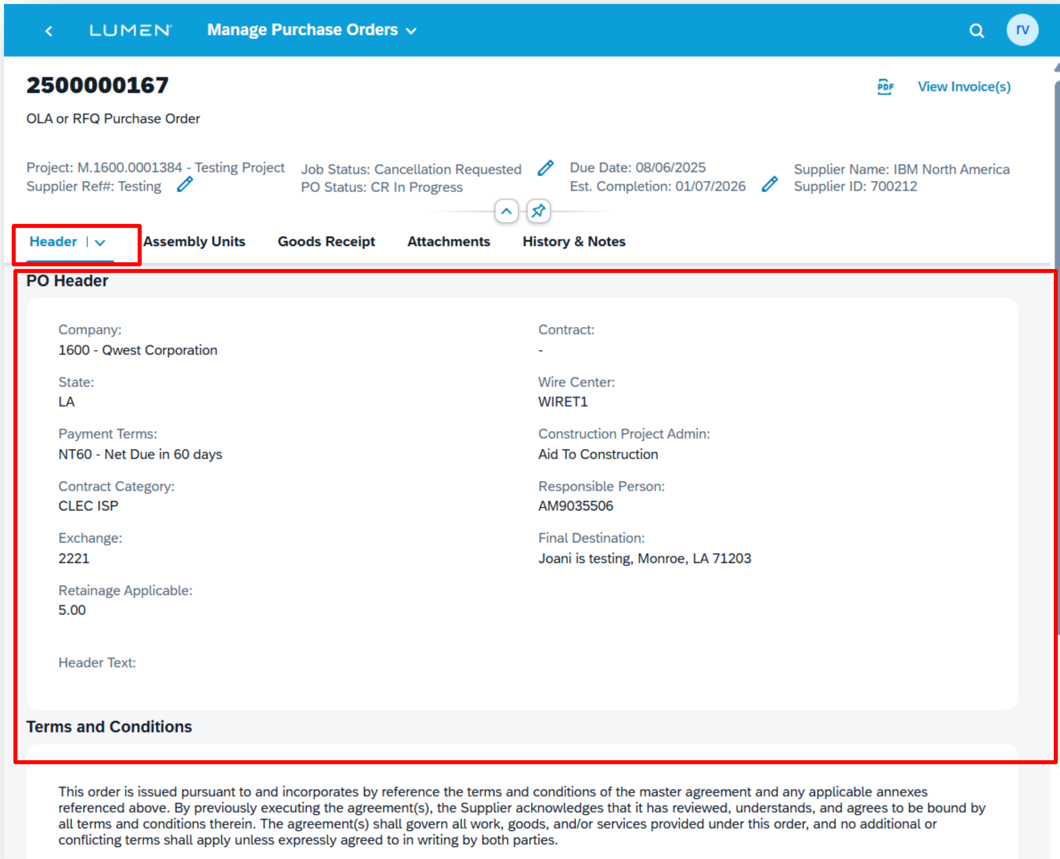
Use the Header tab to:

- 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**.

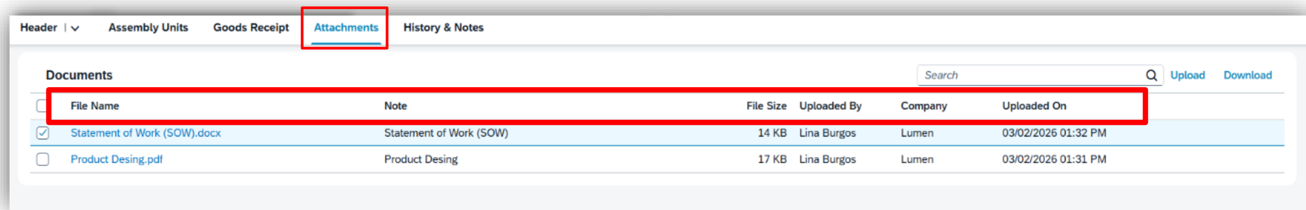
17. Attachments Tab – Deep Dive

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.

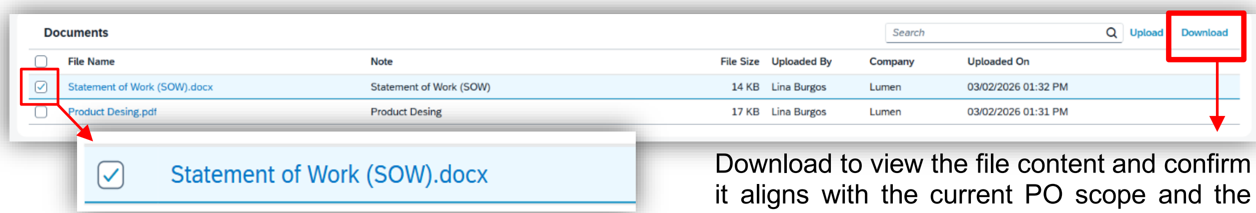
- Open the PO and select the Attachments tab from the tab menu.

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.



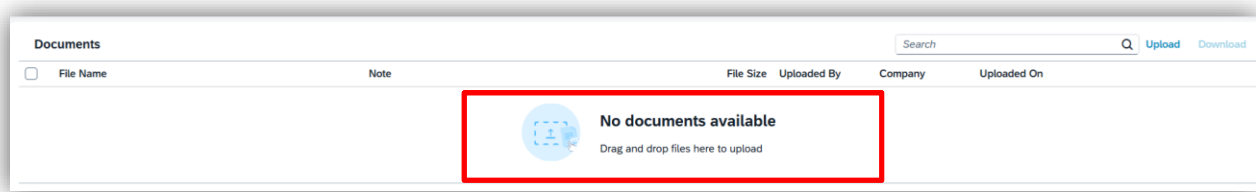
Download to view the file content and confirm it aligns with the current PO scope and the latest change request activity.

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:

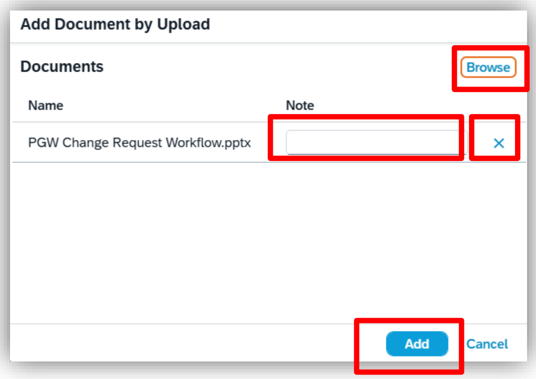
➢ Drag and drop files into the “Drag and drop files here to upload” area.



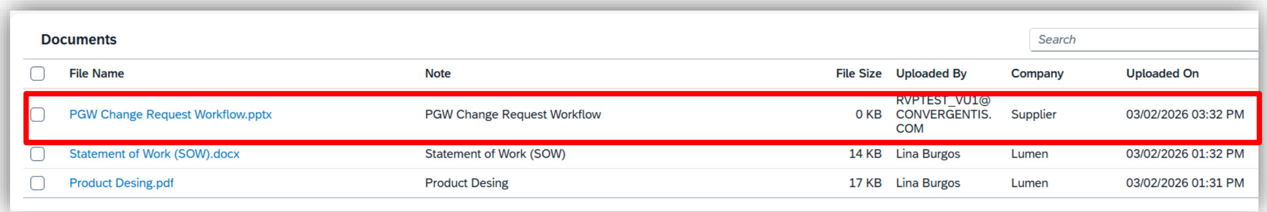
If a document has already been uploaded and the drag-and-drop area is no longer visible, you can still drag and drop files directly onto the table; the functionality remains available.

➢ 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.



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

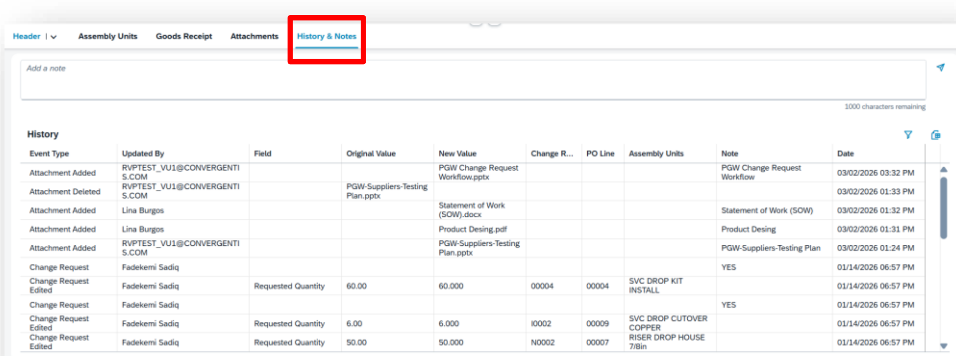

Documents

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



History

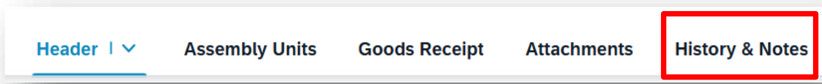
Event Type	Updated By	Field	Original Value	New Value	Change R...	PO Line	Assembly Units	Note	Date
Attachment Added	RVPTEST_VU1@CONVERGENTIS.COM			PGW Change Request Workflow.pptx				PGW Change Request Workflow	03/02/2026 03:32 PM
Attachment Deleted	RVPTEST_VU1@CONVERGENTIS.COM		PGW-Suppliers-Testing 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

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*

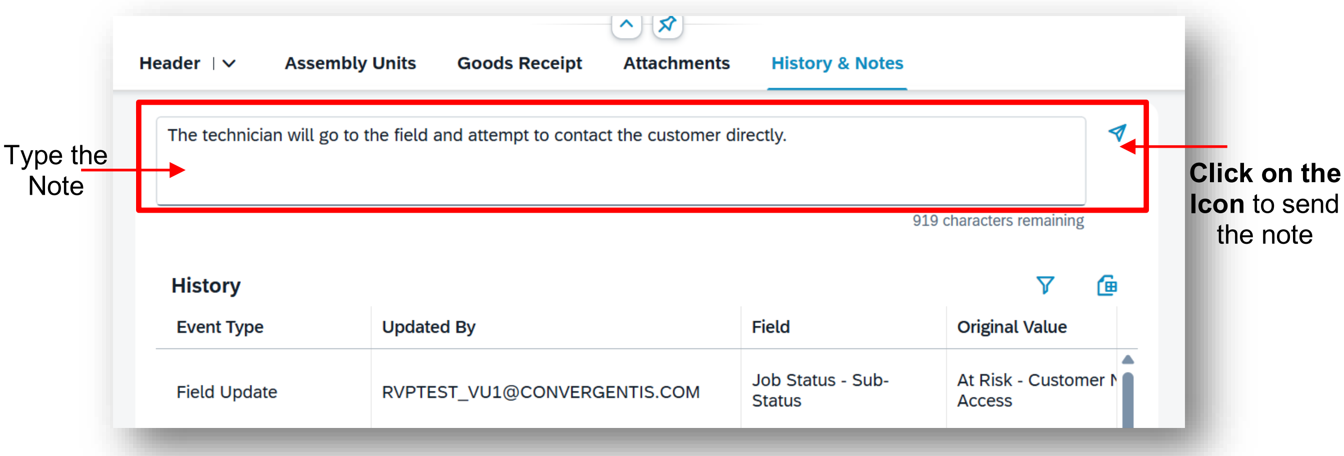
- **Event Type**
- **Field Update events**
  - PO Status update (system-driven)
  - Job Status update (supplier/Lumen/system)
  - Estimated Completion update (supplier)
  - Supplier Reference # update (supplier)

- **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)

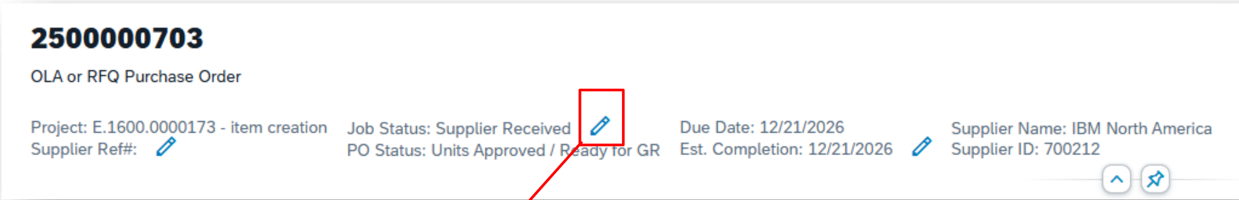
At the top of the tab, you can enter a note in the Add a note text box and send it using the send icon on the right. The counter shows how many characters remain (example: 1000 characters remaining).
How to use it

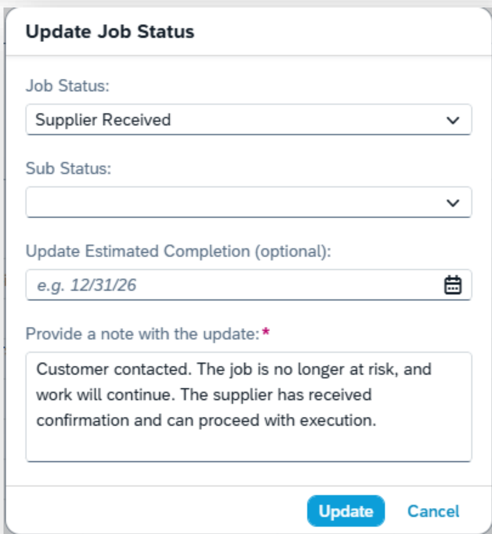


The note is submitted and becomes part of the PO's history record.

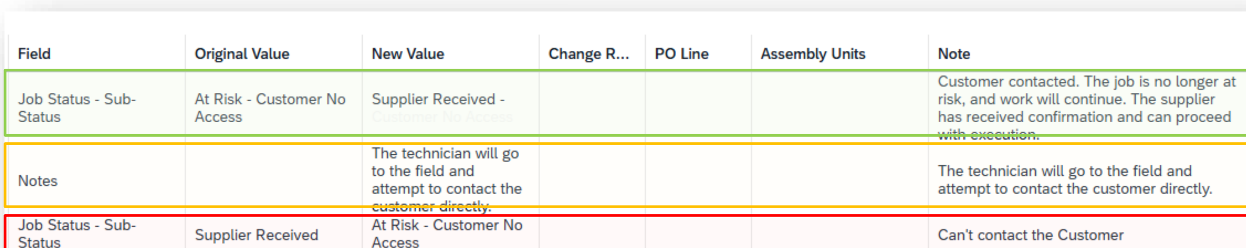
SCENARIO: THE CUSTOMER WAS CONTACTED, AND COMMUNICATION WAS RESTORED

- 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

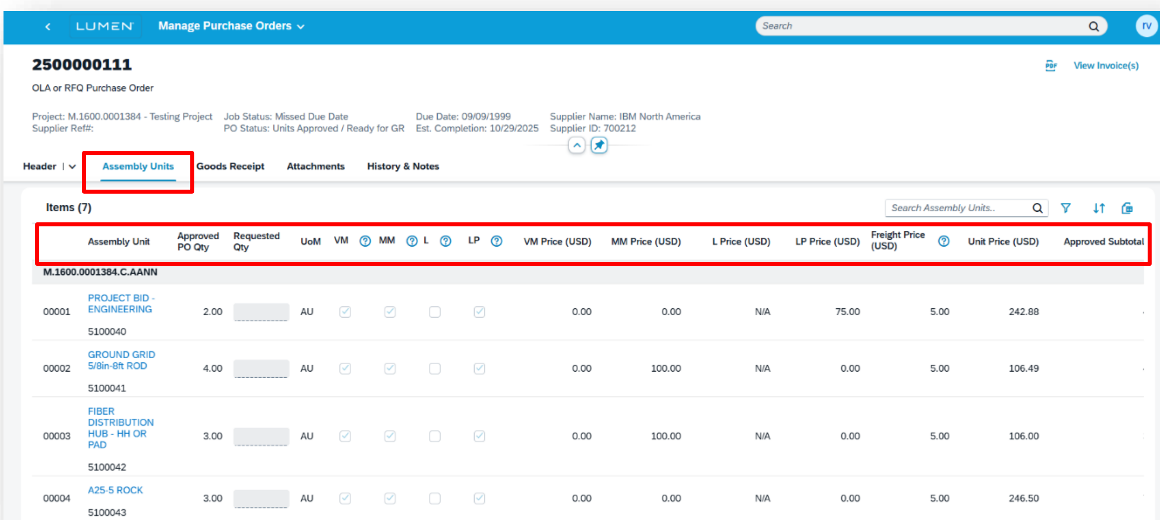
19. Assembly Units Tab – PO Change Request

RFQ-only training rule: For awarded RFQ purchase orders, the supplier may provide Vendor Material (VM) and Minor Material (MM). When those components are supplier-provided on a new AU, enter the applicable price values in the corresponding price component fields.

Use the Assembly Units tab to review your awarded RFQ scope at the AU line level and submit a PO Change Request when the scope must change. This is the main working area where you review the approved work, request quantity or scope updates, enter pricing for supplier-provided components when required, and monitor the item-level status of each requested change. The Assembly Units table shows both the currently approved scope and any requested changes.

The Table includes these Columns:

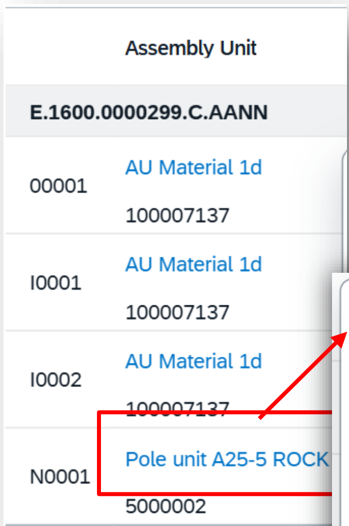
- **Assembly Unit** (AU line identifier and description)
- **Approved PO Qty** (currently approved quantity)
- **Requested Qty** (the quantity you are requesting through the change)
- **UoM** (unit of measure)
- **Component indicators** – VM, MM, L, LP
- **Price fields** – RFQ-based POs display the RFQ pricing columns, including Vendor Material Price, Minor Material Price, Labor Price, Locally Purchased Price, and Freight Price, where applicable
- **Unit Price**
- **Approved Subtotal** and **Requested / New Subtotal**
- **Item Status** (line-level status for the AU)
- **Note**
- **Last Updated**
- **Commitment**



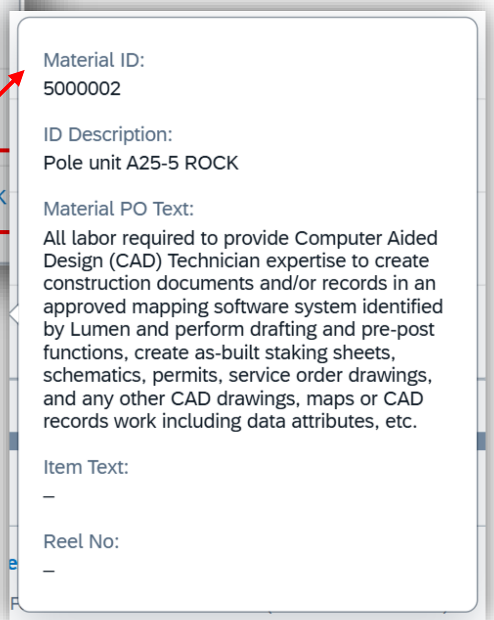
A Timeline and Comments section is also displayed below the table so you can track change request activity and comments. The table toolbar includes Filter, Sort, and Export to Excel.

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), page 24

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 indicators VM, MM, L, and LP show which cost components are included in the AU. These indicators help you understand what the line is made of before you submit a Change Request or proceed to Goods Receipt. For existing approved lines, the component structure is informational. For newly added items, the system can allow the supplier to define or confirm the applicable component structure, subject to system validations.

The component types are:

- **VM (Vendor Material)**
- **MM (Minor Material)**
- **L (Labor)**
- **LP (Locally Purchased Material)**

For awarded RFQ POs, the RFQ pricing fields remain visible in the Assembly Units tab. The RFQ design allows newly added assembly units to move through MPO after award with supplier-entered pricing where required.

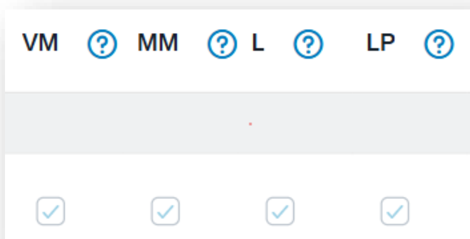
19.3 RFQ Rule for Supplier-Provided Components

For RFQ POs only, apply this business rule:

- Labor, Locally Purchased Material, Vendor Material, and Minor Material may be supplier-provided when applicable to the AU and job setup.
- For new AUs, if you provide any of those components, enter the corresponding prices in the applicable price component fields.
- Freight Price must also be entered when applicable.

When a component indicator is checked, it means that the component applies to that AU line. When it is unchecked, that component is not part of the line. Different AUs can have different combinations of components.

When you add a NEW AU line during a Change Request, PGW may allow you to select the component structure for that line, subject to system rules and validations. Use the component selections to reflect the supplier-provided structure of the new AU. Invalid or incompatible combinations can still be blocked by the system.



20. Item Status Overview (Awarded RFQ POs)

Use Item Status in the Assembly Units tab to understand where each AU line is in the awarded RFQ Change Request process. Item Status is a line-level status. This means a single PO can contain multiple AU lines with different statuses at the same time.

You do not manually update Item Status. The system updates it automatically based on the change you submit, the required approvals, and the synchronization steps that occur after approval.

- *Item Status vs. PO Status*

  - **PO Status** is a header-level summary that shows the overall state of the Purchase Order (for example: **CR In Progress**, **Units Approved / Ready for GR**, **Closed**).

  - **Item Status** is a line-level status for each Assembly Unit and tells you exactly what is happening to that specific line (for example: **Approved**, **Pending Unit Confirmation**, **Pending Price Confirmation**, **Pending Supplier – Unit Change**, **Pending Supplier – Price Change**, **Approved (Syncing)**)
- *How PGW summarizes pending work (awarded RFQ POs)*

On the MPO landing page, Items Pending helps you see whether action is pending on your end or with Lumen.

Pending with Supplier (your action)
- In awarded RFQ POs, this includes lines returned to you for update, such as:
  - Pending Supplier – Unit Change
  - Pending Supplier – Price Change
  - Pending with Lumen (waiting for review or approval)

In awarded RFQ POs, this includes lines waiting for review, approval, or system processing, such as:
  - Pending Unit Confirmation
  - Pending Price Confirmation
  - Pending Financial Approval
  - Approved (Syncing)
  - Budget Error
  - EFAA Rejected

- *Item Status process flow (awarded RFQ PO, supplier-initiated)*

This is the most common flow you will experience when you initiate a Change Request:

- Approved *(starting point)*
- You request a change (increase/decrease / remove/add) and submit it
  The line moves to Pending Unit Confirmation
- If Lumen confirms the work change, the line moves forward and may go to:
  - Pending Price Confirmation *(if Procurement price review is required)*
  - Pending Financial Approval *(if no separate price review is needed and financial approval applies)*
- If Lumen rejects the work change, the line returns to:
  - Pending Supplier – Unit Change
- If Procurement rejects the proposed price, the line returns to:
  - Pending Supplier – Price Change
- After all, required approvals are completed, the line moves to:
  - Approved (Syncing)
- Once synchronization is finished, the line reverts to:
  - Approved

- *Special behavior for increases (INCR line)*

For quantity increases, PGW may create a new increment line (INCR) and display a message indicating that a new line was added. That increment line is the one that moves through the Change Request process, while the original approved line remains available for execution.
This means:

- The original line continues to represent the already approved scope
- The INCR line represents only the additional requested quantity
- The INCR line is the one that moves through statuses such as:
    - Pending Unit Confirmation
    - Pending Price Confirmation
    - Pending Financial Approval
    - Approved (Syncing)

This allows the approved scope to remain visible and usable while the requested increase is still under review.

- *Special behavior for new AUs in awarded RFQ POs*

When you add a new AU, the line is added as a NEW line and enters the awarded RFQ Change Request process.

For awarded RFQ POs only, if the new AU includes supplier-provided components, you may need to enter pricing for the applicable price component fields, including:

- Vendor Material (VM)
- Minor Material (MM)
- Labor (L)
- Locally Purchased Material (LP)
- Freight

This applies only when those components are being provided by you for the new AU.

Once submitted, the new line moves through the same approval flow, which may include:

- Pending Unit Confirmation
- Pending Price Confirmation
- Pending Financial Approval
- Approved (Syncing)

- *Special behavior for withdrawal*

If the system detects that the requested change has been returned to the original approved quantity, it can treat the change as withdrawn once you submit it with the required comment.
Examples:

- If you changed an existing line, set Requested Qty back to the original approved quantity
- If you added a NEW line, set the Requested Qty back to 0

After submission, the pending change is removed, and the line returns to:

- Approved

- Item Status + PO Status relationship (awarded RFQ POs)

When at least one AU line is in a pending change state, such as:

- **Pending Unit Confirmation**
- **Pending Supplier – Unit Change**
- **Pending Price Confirmation**
- **Pending Supplier – Price Change**
- **Pending Financial Approval**
- **Approved (Syncing)**
- **Budget Error**
- **EFAA Rejected**

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, the way you update Job Status. Item Status changes automatically based on:

- the quantities you enter in Change Request mode
- the price component values you enter for new RFQ work, when applicable
- submitting the Change Request
- Lumen Responsible Person confirmation or rejection
- Procurement price review
- budget/tolerance outcomes
- EFAA approval outcomes
- PR/PO synchronization

Use Item Status to understand what action is required, whether the line is waiting on you or Lumen, and when the line is ready to move forward.

20.1 RFQ Item Status — Quick Decision Guide

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

- *Item Status: Approved*

  - **What it means**: No active change is pending on this line.
  - **Do this:** Continue normal execution or start a new Change Request if the scope must change.

- *Item Status: Pending Unit Confirmation*

  - **What it means**: Your requested work change is waiting for the Lumen Responsible Person to review and confirm it.
  - **Do this:**
    - Wait for Lumen to confirm or reject the change.
    - Continue working on other approved lines as needed.
  - **Avoid:** Do not try to rework the same line unless it is returned to you.

- *Item Status: Pending Supplier – Unit Change*

  - **What it means:** Lumen rejected the requested work change 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 Price Confirmation*

  - **What it means:** The line has moved to the Procurement price review step.
  - **Do this:** Wait for Procurement to confirm or reject the price.
  - **Avoid:** Do not attempt to edit the line while it is in this status.

- *Item Status: Pending Supplier – Price Change*

  - **What it means:** Procurement rejected the proposed price and returned the line to you.
  - **Do this:** Update the required price fields for that line and resubmit the change.
    For awarded RFQ POs, this can apply when the line includes supplier-provided pricing for components such as:
    - Vendor Material (VM)
    - Minor Material (MM)
    - Labor (L)
    - Locally Purchased Material (LP)
    - Freight

Update only the fields required for that line and resubmit the change.

- *Item Status: Pending Financial Approval*

  - **What it means**: The change is moving through financial approval steps. Tolerance-based routing and EFAA approval may apply.
  - **Do this:** Wait and continue working on other lines not included in the change, if applicable.
  - **Avoid:** Do not attempt to edit the line while it is in the approval flow.

- *Item Status: Approved (Syncing)*

  - **What it means:** All required approvals are complete, and the system is synchronizing the approved change back to SAP, so the PR/PO reflects the approved quantities and values.
  - **Do this:** Wait for synchronization to complete.
  - **Expected Result:** The line returns to Approved after the PO is updated.

- *Item Status: Budget Error*

  - **What it means:** The budget check failed for the change.
  - **Do this:** Wait for Lumen to resolve the budget issue or return the item for rework or withdrawal.
  - **Tip:** Check Message Center and Timeline / Comments for updates related to the change request.

- *Item Status: EFAA Rejected*

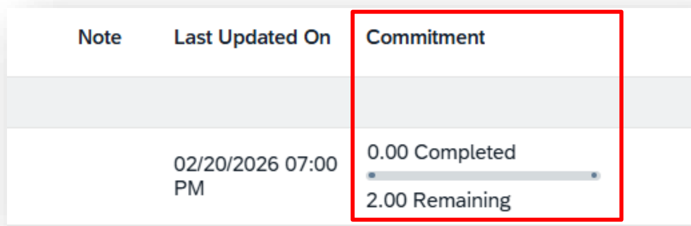
  - **What it means:** Financial approval rejected the change.
  - **Do this**: Wait for the line to be returned for correction, rework, or withdrawal based on Lumen handling.
  - **Tip:** Use Message Center and Timeline / Comments to track the outcome.

20.2 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).



21. PO Change Request in Assembly Units (Awarded RFQ POs): Increase, Decrease, Remove, and Add Units

21.1 Awarded RFQ Change Request (End-to-End)

Let's run an end-to-end awarded RFQ 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 is demonstrated in one continuous run, including: INCR line creation for quantity increases, NEW line creation for added Aus, decrease, and removal validations using the Commitment chart, Timeline & Comments updates, Procurement price review when pricing is required, rejection handling, Withdrawal by reverting Requested Qty to Approved PO Qty

Use an awarded RFQ 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 removal or reduction validation can be tested.
- At least 1 AU line has no Goods Receipts posted, so it can be safely used for increase or decrease scenarios without receipt restrictions.

If a new AU is added, be prepared to enter the required RFQ price components for the supplier-provided work. For awarded RFQ POs only, this can include:

- Vendor Material (VM)
- Minor Material (MM)
- Labor (L)
- Locally Purchased Material (LP)
- Freight

21.2 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.

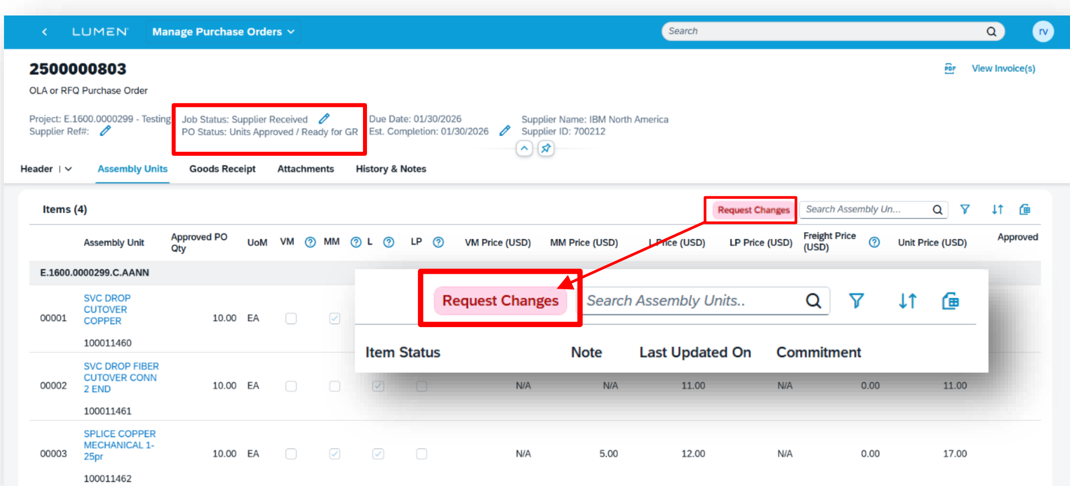
Before starting, confirm the header reflects:

- **Job Status = Supplier Received**
- **PO Status = Units Approved / Ready for GR**

This combination indicates that the PO is in its execution phase, the awarded scope is approved, and the PO is eligible for **Goods Receipt** submission, subject to line-level rules.

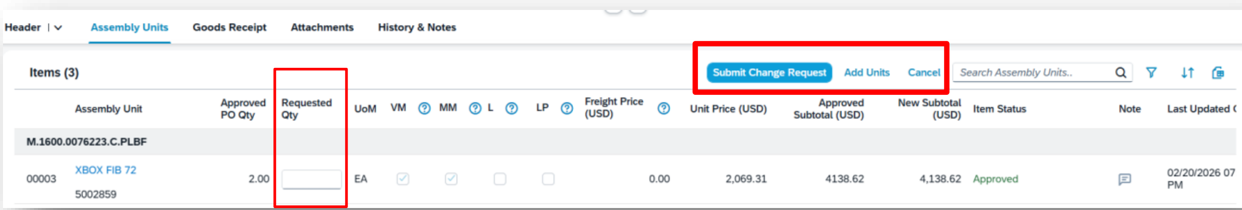
If no changes are required, the next step would be to move directly to the **Goods Receipt** tab. For this exercise, a change is required, so remain in the **Assembly Units** tab and select **Request Changes** to initiate the awarded RFQ Change Request process.

- 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
- The **Requested Qty** column becomes editable for the lines you are allowed to change

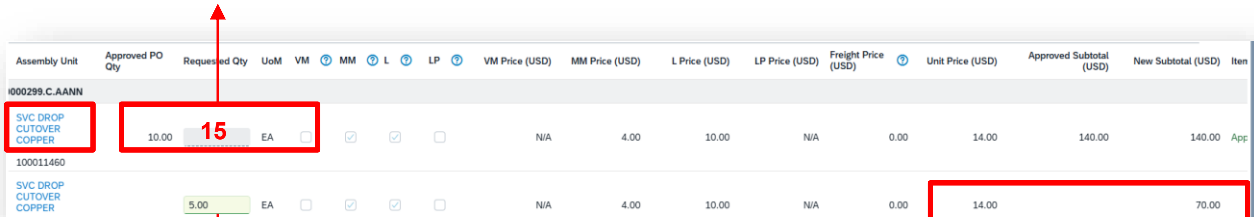


21.3 Increase an Existing AU (Generate an INCR Line)

When you increase the quantity on an existing Assembly Unit line, PGW creates a separate INCR (increment) line. In practice, the INCR line represents only the additional quantity requested beyond what is already approved. For example, if the Approved PO Qty is 10 and you enter 15 as the total quantity needed, the system creates an INCR line for the additional 5 units. The original approved line remains available for execution while the additional quantity moves through the awarded RFQ Change Request approval process.

➢ Select an AU line where the approved quantity must be increased. In Requested Qty, enter a value greater than the Approved PO Qty and confirm that the system creates a new line identified as INCR.

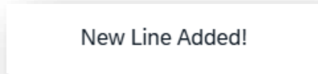
Enter **15** (the total unit quantity required to complete the job).



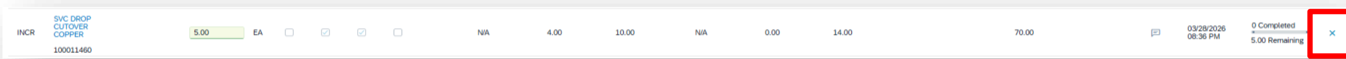
The system applies the **Unit Price** to the line and recalculates the **New Subtotal**.

The **INCR** line may be created for **5** (**10 + 5 = 15** total units for the job).

After you press 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 confirmation message appears at the bottom of the screen.

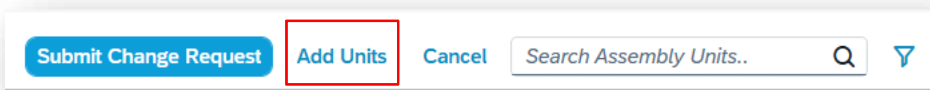


After the new line is created, the Requested Qty field returns to read-only mode on the original line. The INCR line can still be deleted before you submit the Change Request. For practice, delete the INCR line by selecting the X at the end of the row, confirm that it is removed, and then recreate the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



21.4 Add a “Net New” AU (Generate a NEW Line)

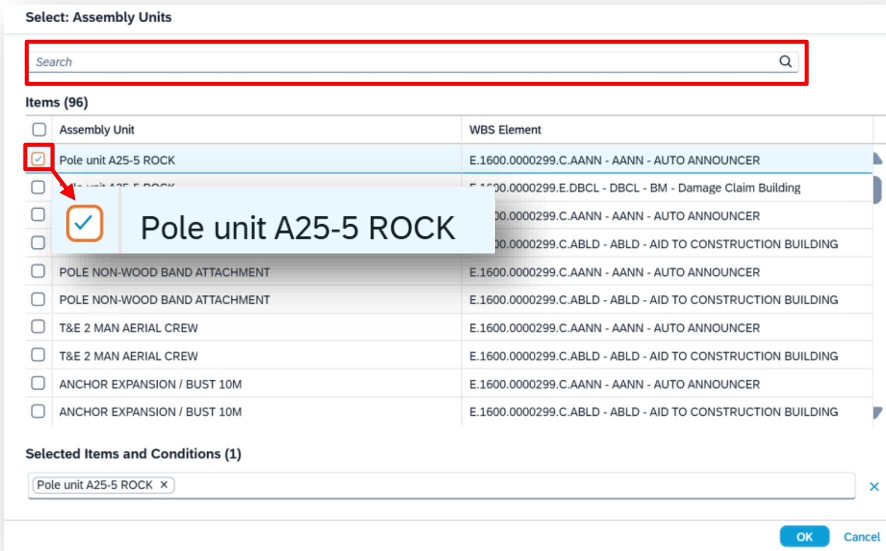
- Click Add Units to open Select Assembly Units.



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.

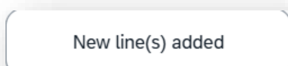
- To add a unit, select the checkbox at the far left of the row you want to add it to. Then select OK to confirm and add the selected Assembly Unit(s) to the PO.

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, POLE UNIT A25-5 ROCK). Remove a selection from this area if needed.



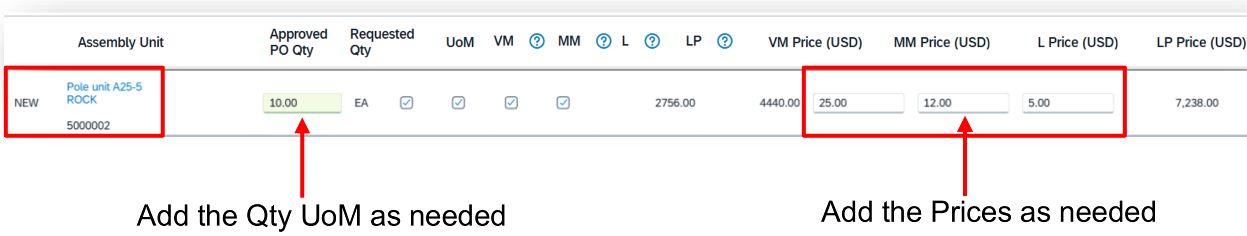
➢ After you select the Assembly Unit(s), click OK to add them to the Change Request.

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



Confirm that the newly added line appears in the table marked NEW. Enter a Requested Qty for the NEW line and complete any editable RFQ fields required for that line, including component selections and price values where applicable.

➢ For each newly added line, enter a Requested Qty

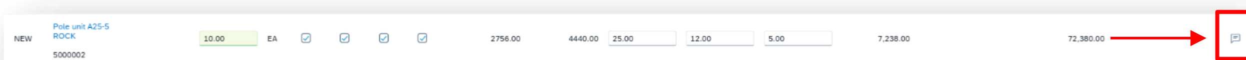


When you add a **Net-New Assembly Unit (AU)** as a new line to an **awarded RFQ Change Request**, the pricing is not automatically contract-derived, as it is in OLA. Instead, you enter the **quantity** needed for the new AU and provide pricing for the applicable supplier-provided components directly in PGW. For **RFQ POs**, this may include Vendor Material (VM), Minor Material (MM), Labor (L), Locally Purchased Material (LP), and Freight, depending on how the AU is configured. If those components are provided by you, the corresponding price fields must be completed for the new line to move through the RFQ approval process.

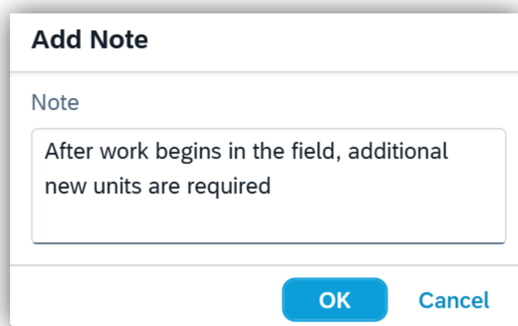
Some AU components are displayed with a checkbox because they are valid for that AU. Selecting or displaying a component indicates that the component applies to the new line and, when supplier-provided, its price must be entered in the related price field. Components that do not apply to that AU may display as **N/A** or remain unavailable on the line.

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

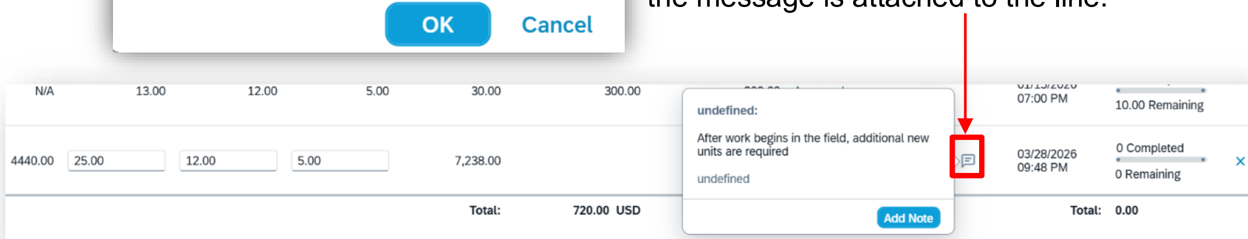
The **Note Icon** appears on a newly created AU line because the line has an **item-level note/comment** associated with it. In the change request flow, a note can be entered specifically for the new line to explain what was added and why; PGW shows the note icon as a visual indicator that "this line 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 line-level note that will be shared with Lumen during Change Request review, then click OK.



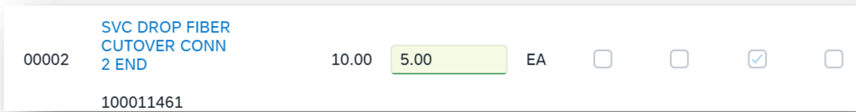
After selecting **OK**, the note is saved. Select the **Note icon** again to confirm the message is attached to the line.



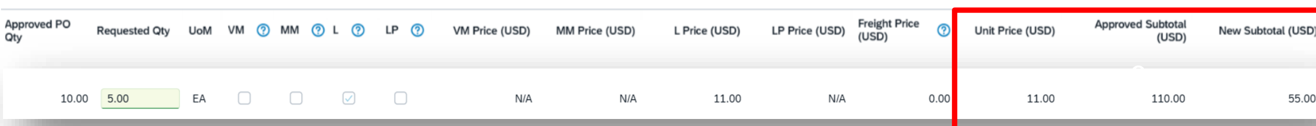
21.5 Reduce the existing AU

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 = **10** and the updated quantity needed is **5**, the line is reduced to **5**).

- ➢ 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.

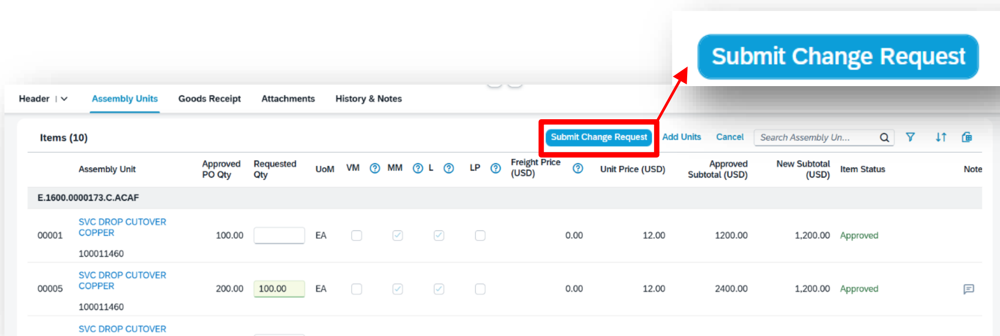


Review the recalculated values on the line, including the updated **New Subtotal**.



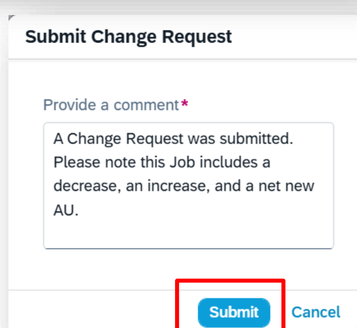
After decreasing the quantity, the **New Subtotal** updates to reflect the lower value based on the approved/unit pricing

- ➢ Review all requested changes and confirm that they are ready to be submitted, then click Submit Change Request.

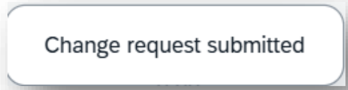


The Submit Change Request window is displayed. Enter a comment (mandatory) and proceed with submission. A confirmation message appears indicating the Change Request has been submitted.

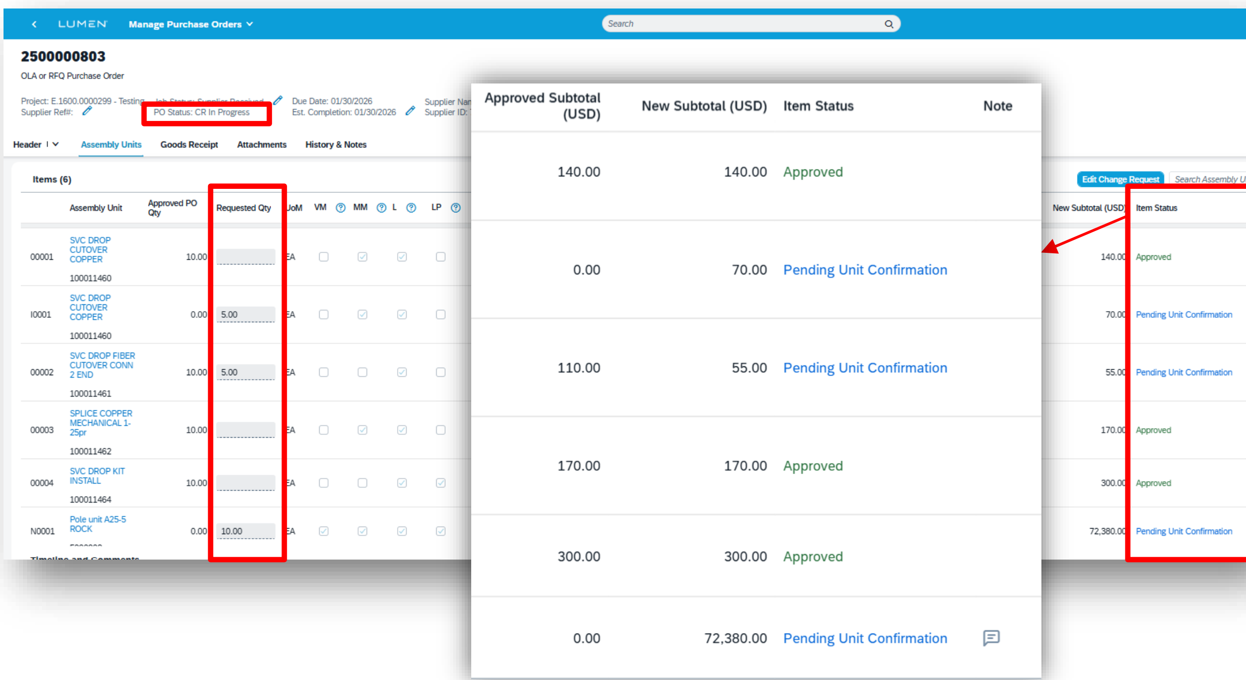
- ➢ Click Submit.



After submission, a confirmation 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.



Scenario: 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 according to the preferences set in Message Settings, either as an email notification and/or 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.

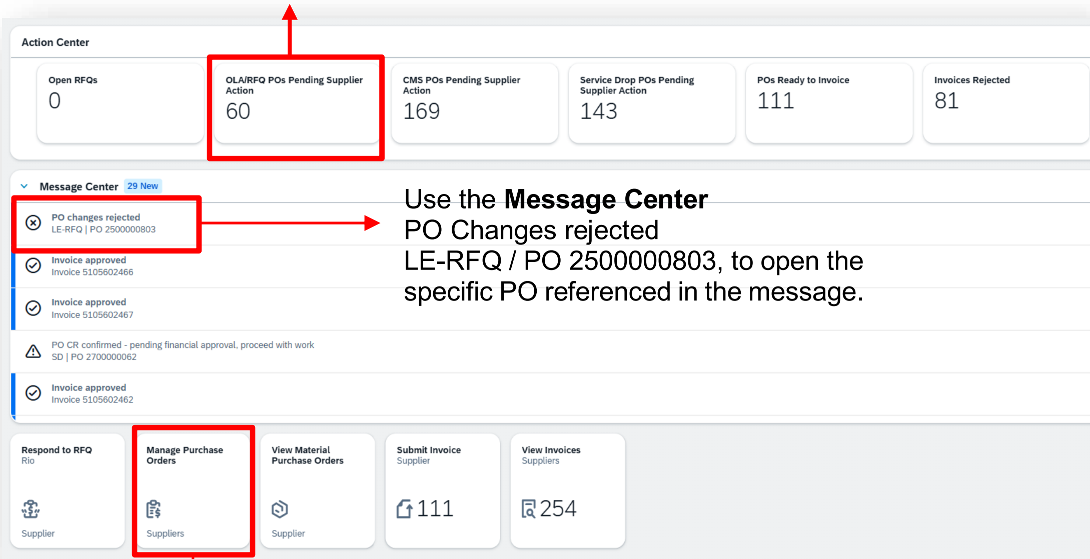
This step relates to the Action and Manage Center settings. For complete instructions, refer to: Module 1. Getting Started in PGW: Overview, Login, Preferences, and Navigation. Section: 6. Home Page Navigation. Action Center, Message Center, and Action Tiles, Page 13.

21.6 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:

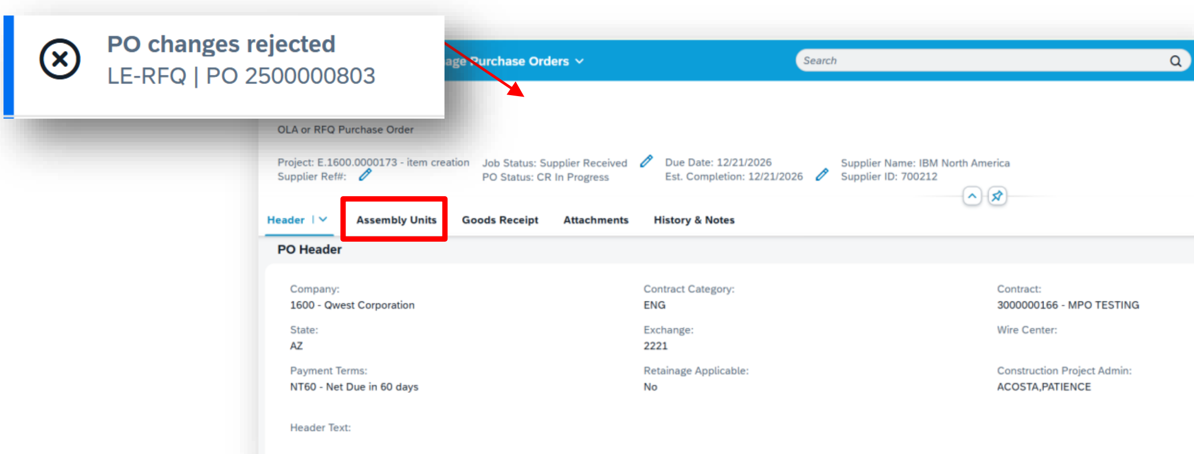
Use the **Action Center tiles** / OLA/RFQ POs Pending Supplier Action to list POs waiting for an action



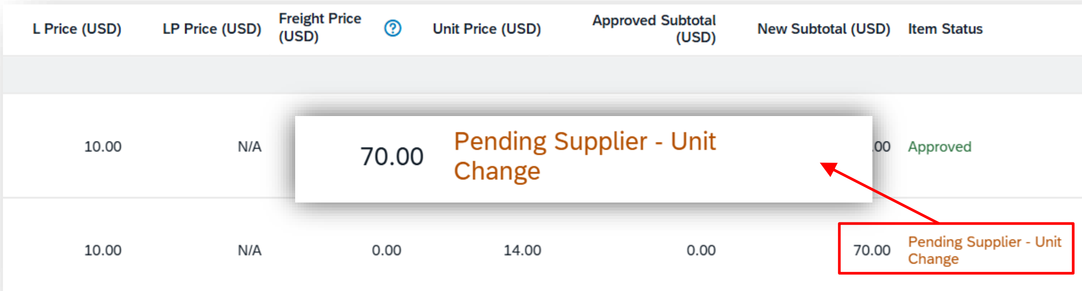
Use the **Message Center** PO Changes rejected LE-RFQ / PO 2500000803, to open the specific PO referenced in the message.

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

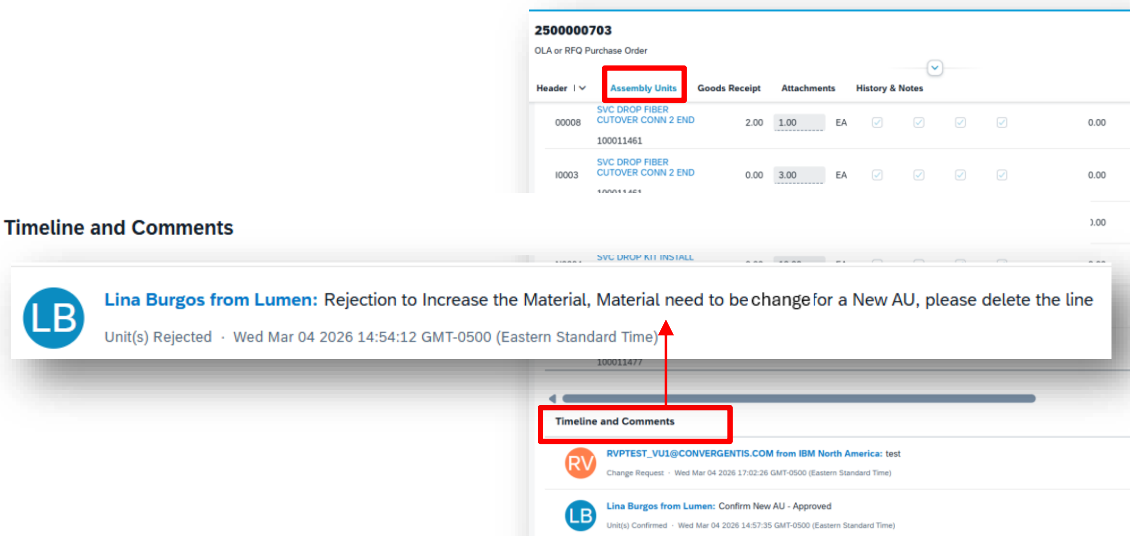


If Lumen rejects the work change, the line returns to you with Item Status = Pending Supplier – Unit Change, and the rejection feedback is captured in Timeline & Comments at the bottom of the table for traceability.



- ➢ 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.

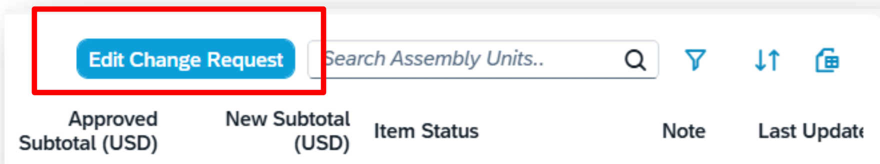
21.7 Remove or Withdraw Unit for an Existing Assembly Unit

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.

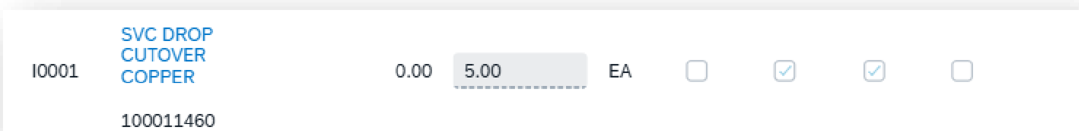
- For existing lines, the Approved Qty is greater than zero, therefore you must enter the same amount as the Approved Qty to withdraw the change request (for example, if the Approved PO Qty is 200, and you first entered a Requested Qty of 100, which Lumen rejected, you can update the Requested Qty field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

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

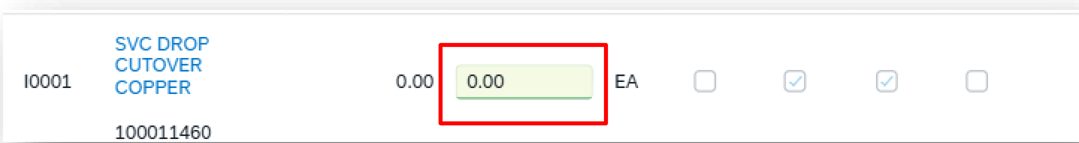


The table switches back to **edit mode**.

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



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

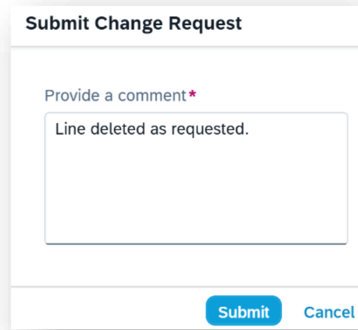


➢ Then select **Submit Change Request** in the top-right of the table (as performed earlier).

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

After you click **Continue**, the **Submit Change Request** message window is displayed. Enter the message you want to share with Lumen, then click **Submit**.



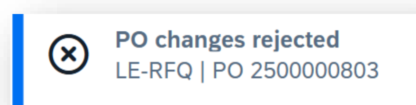
Once the change is submitted and approved, and the PR/PO sync is completed, the line is marked for deletion at the back end. The PO line is then removed from the Assembly Units table

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

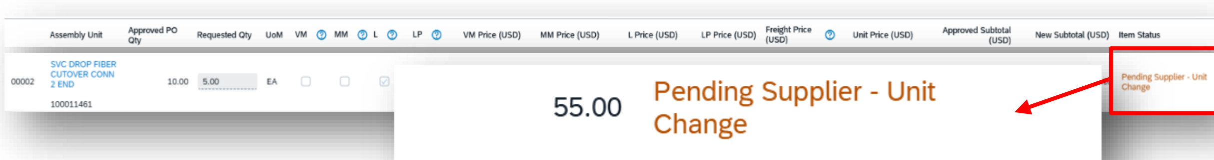
SCENARIO: LUMEN REJECTS THE CHANGE REQUEST AND ASKS FOR THE REQUESTED QUANTITY TO BE REVISED

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.

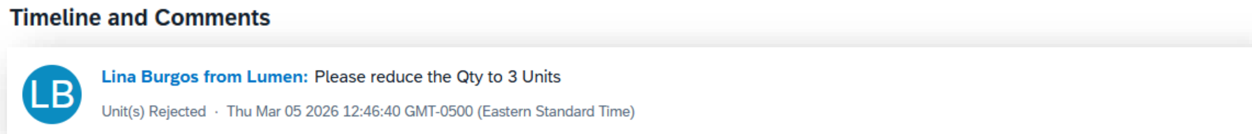


If Lumen rejects the work change, the line returns to you with Item Status = Pending Supplier – Unit Change, and the rejection feedback is captured in Timeline & Comments at the bottom of the table for traceability.

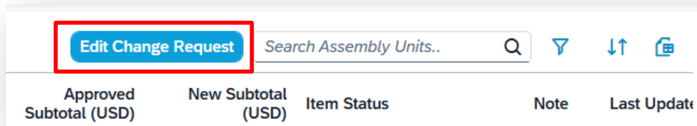


➢ Review the outcome in **Timeline & Comments** (rejection note).
➢ Use the rejection feedback to either revise and resubmit the requested quantity or withdraw the change by reverting the Requested Qty back to the approved value.

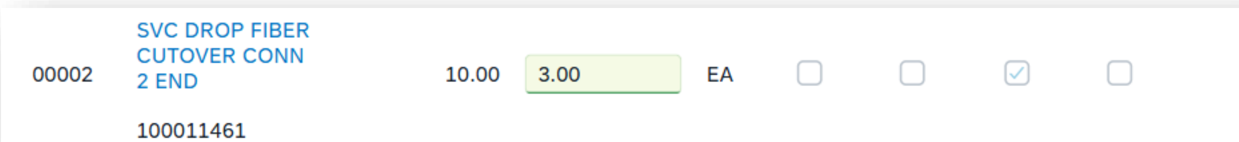
Use the rejection feedback to either revise and resubmit the requested quantity or withdraw the change by



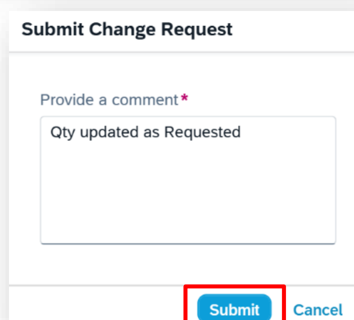
- Select **Edit Change Request**

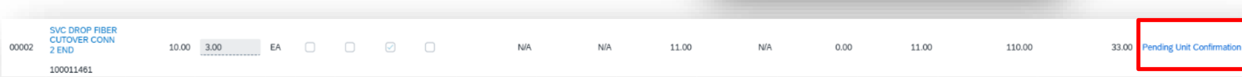


- Locate the AU line that requires a reduction, enter the **Requested Qty by Lumen** in the **Requested Qty** field, then press **Enter** to apply the change. Review the recalculated values on the line, including the updated **New Subtotal**, then select **Submit Change Request**.



After you click **OK**, the **Submit Change Request** message window is displayed. Enter the message you want to share with Lumen, then click **Submit**.



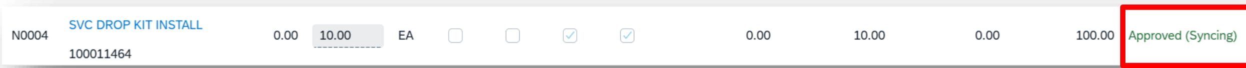


The Item status goes back to Pending Unit Confirmation

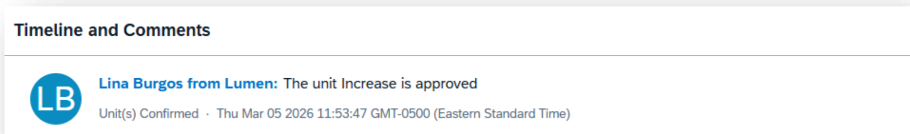
After Lumen approves the update, the line item moves to the Approved (Syncing) status. Once the system synchronizes the approved Change Request, the PO is updated, and you receive a message confirming that the PO changes were approved.

21.8 Lumen Approves a Change Request

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



➢ Review the outcome in Timeline & Comments.



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

21.9 Pending Financial Approval

When the Responsible Person confirms a line item, financial approval may still be required for awarded RFQ POs. If the change increases the PR/PO value beyond the allowed tolerance or available budget, the line does not move directly to sync. Instead, it can move into Pending Financial Approval after the required unit and price reviews are complete. Any increase must also pass the commitment control (budget) check. If the budget is insufficient, the change is blocked until Lumen resolves the budget issue.

- *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.

Related statuses (exceptions):

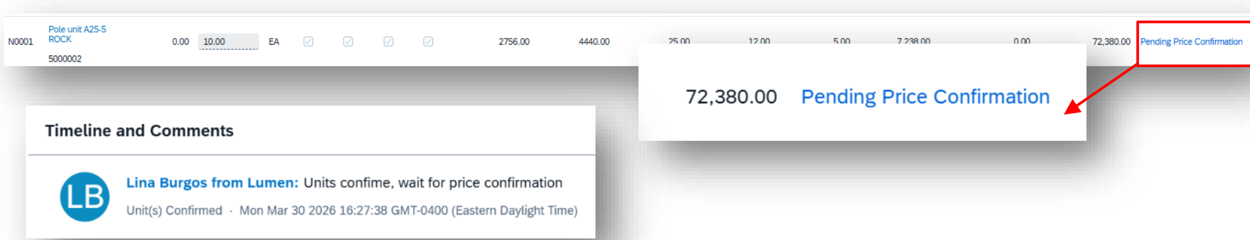
- **Budget Error**: The change failed the budget/commitment control check.
- **EFAA Rejected**: The approver rejected the financial approval request.
- **Pending Supplier – Unit Change**: Lumen rejected the unit change and returned it to the supplier for correction and resubmission.

21.10 Additional RFQ-only price review and exception - Procurement Reviews the Price (Pending Price Confirmation)

After the Responsible Person confirms a newly added or newly priced line, the line can move to **Pending Price Confirmation**. This means the work change has been accepted at the unit level and is now awaiting Procurement's review of the proposed price.

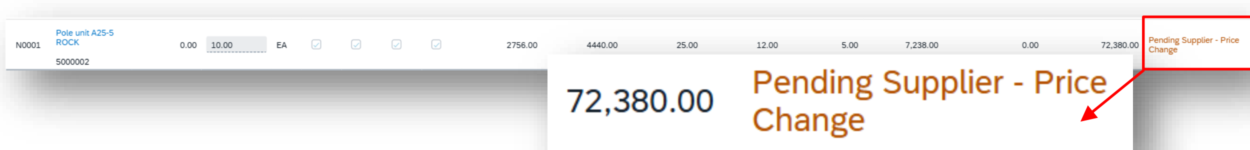
At this stage:

- The line remains read-only for you
- Procurement reviews the proposed pricing for the new or updated work
- the line either moves forward to budget / financial review or returns to you for pricing updates
- What you should do: Wait for Procurement’s response and monitor Message Center and Timeline & Comments for updates.



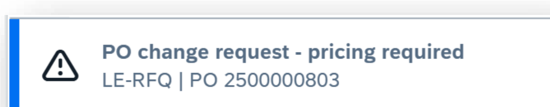
21.11 Procurement Rejects the Price (Pending Supplier – Price Change)

If Procurement rejects the proposed price, the line returns to you with the Item Status set to **Pending Supplier – Price Change.** This means the unit itself has already moved through the earlier review step, but the price still needs to be corrected before the change can continue.

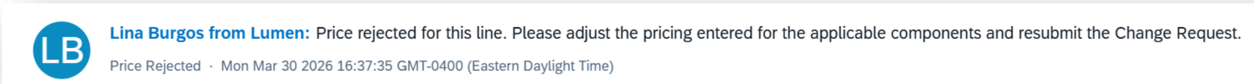


When this happens, open the PO from Message Center, Action Center, or Manage Purchase Orders, go to the Assembly Units tab,

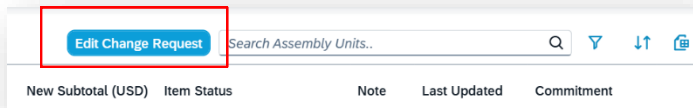
- ➢ Open the PO from the **Message Center**



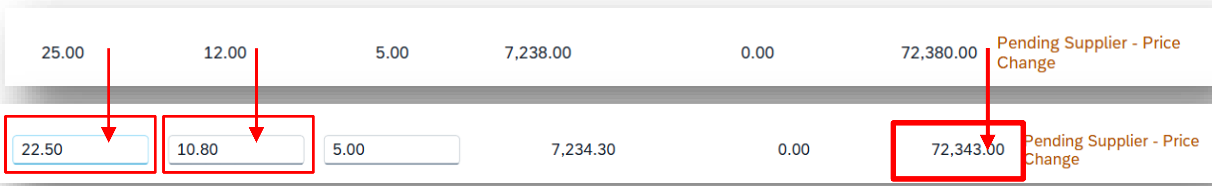
- Review of the **feedback in Timeline & Comments**

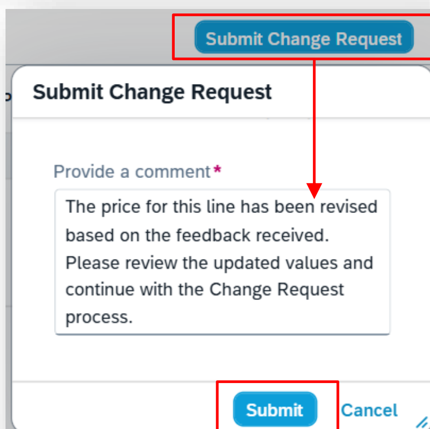


- Select **Edit Change Request**

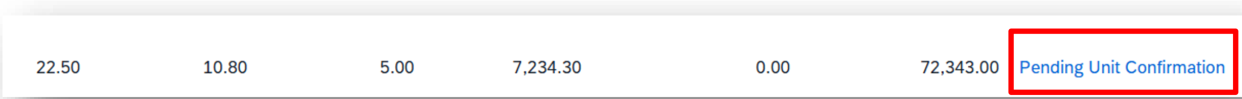


- Update the required RFQ price fields and resubmit the change with a comment.





The subtotal is recalculated, and the line returns to Item Status **Pending Unit Confirmation**

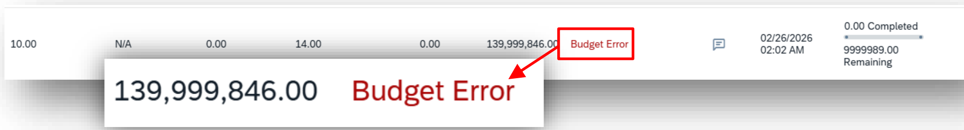


Note: For awarded RFQ POs, this can apply when the line includes supplier-provided pricing for Vendor Material (VM), Minor Material (MM), Labor (L), Locally Purchased Material (LP), and Freight.

22. Budget Error

If the change passes unit and price review but fails the budget check, the line moves to Budget Error. This means the requested change cannot continue until Lumen resolves the budget issue.

When a line is in Budget Error, the change is blocked and must be handled on the Lumen side. The Responsible Person can increase the budget and reconfirm the changes to trigger the budget check again.

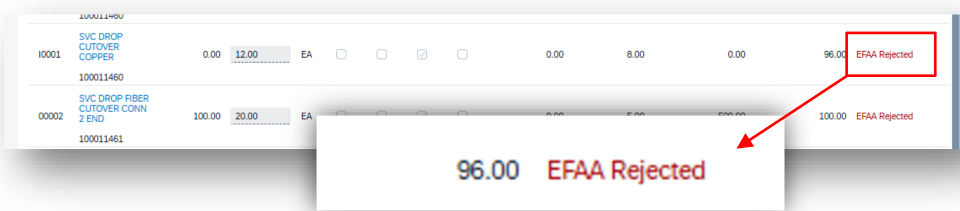


What you should do: Wait for Lumen to resolve the budget issue or return the line for rework. Monitor Message Center and Timeline & Comments for updates.

23. EFAA Rejected

If the budget check passes but the change is rejected during EFAA approval, the line moves to EFAA Rejected. This means the financial approval step was not approved, and the change cannot continue until Lumen decides how to handle it.

For awarded RFQ POs, the result is routed back to the Responsible Person, who can reject the change and return it to you for correction or withdrawal. If the line is returned to you and you resubmit it, unit confirmation is required again. Price confirmation can be skipped only if the previously approved price does not change.



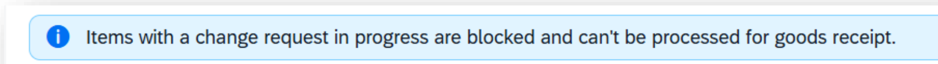
What you should do: Wait for Lumen's next action. If the line is returned to you, review the feedback in Timeline & Comments, update the line as needed, and resubmit it.

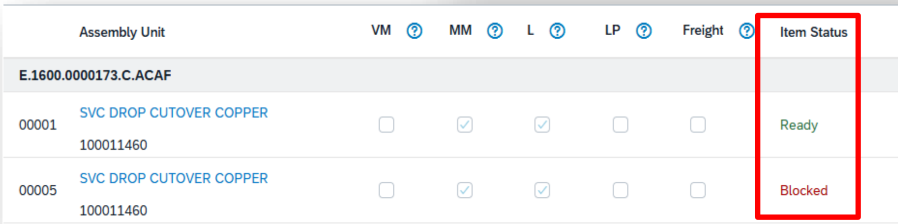
24. Goods Receipt Tab – Old CUPS – Deep Dive

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.

24.1 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)

24.2 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.

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

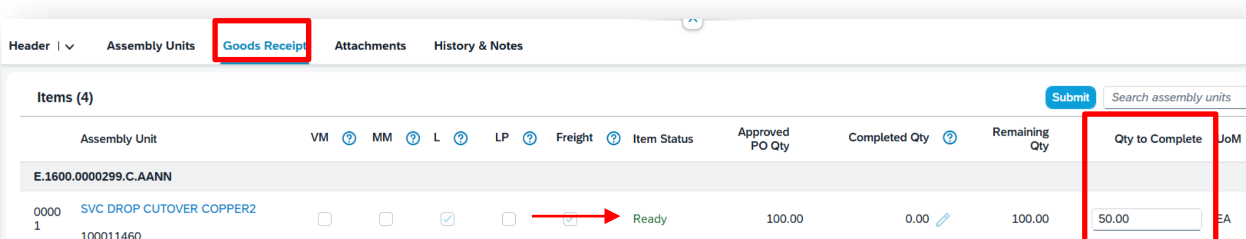
Partial GR is enabled by the quantity tracking fields on the screen:

- **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.

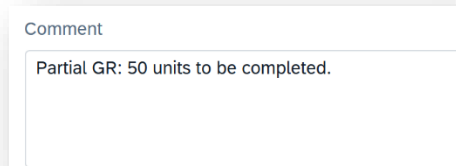
- ➢ Open Manage Purchase Orders, locate the target PO, open it, then go to the Good Receipts tab. Select a line where **Item Status** is **Ready**, then locate the **Qty to Complete** Column. Confirm that the field is editable, then enter the partially completed quantity.



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**.

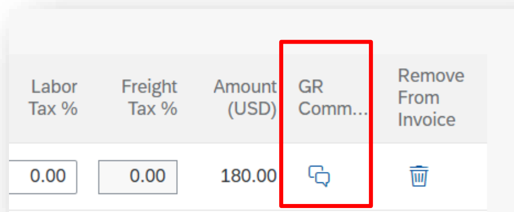
- At the bottom of the screen, locate the **Comment** section and enter clear Good Receipts (GR) comments.



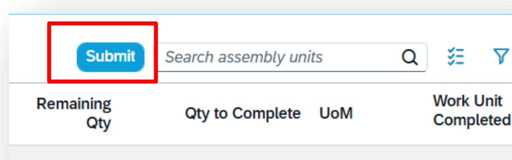
If a Goods Receipt is submitted for multiple lines, the GR comment is carried forward to each line when Submit Invoices is run. Since invoices can reflect quantities from different GR submissions, each line can display a different comment depending on which GR entry created the receipted quantity.

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

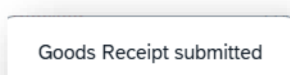
On the invoice, the GR comment is indicated by a **Message icon**, showing that the comment is carried forward and visible.



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



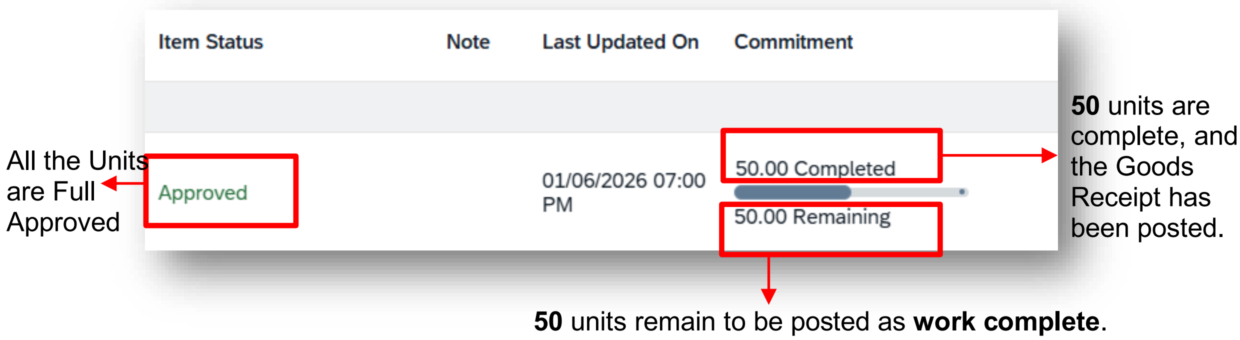
After submission, a toast message appears at the bottom of the screen.



- *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.

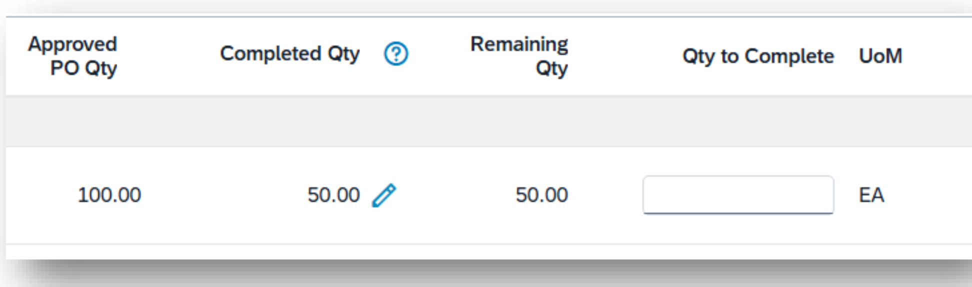
Note: Use the Goods Receipt tab to post quantities; use the Commitment chart as the at-a-glance indicator of how much of each AU line is Completed versus Remaining after GR postings.



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

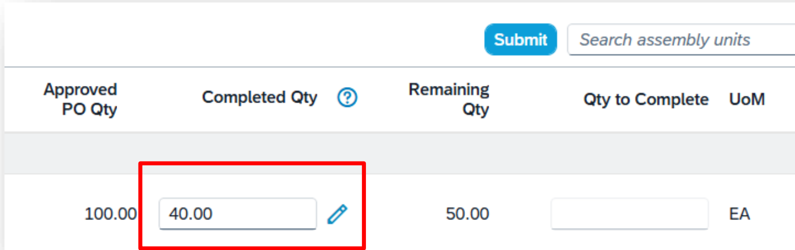
The Reverse Goods Receipt (Reverse GR) process is used to reverse a previously posted Goods Receipt when a quantity was received in error or needs correction. Reversing a GR reduces the Completed Qty and increases the Remaining Qty on the affected AU line, restoring the line to the correct execution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

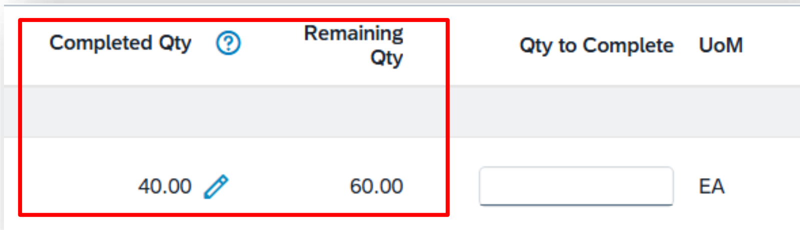
Reverse GR follows the same execution controls as GR: only eligible lines can be processed, and the correction should be performed before continuing with additional receipts and invoicing activities to ensure quantities remain consistent across the PO line and its progress tracking.



- ➢ 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**



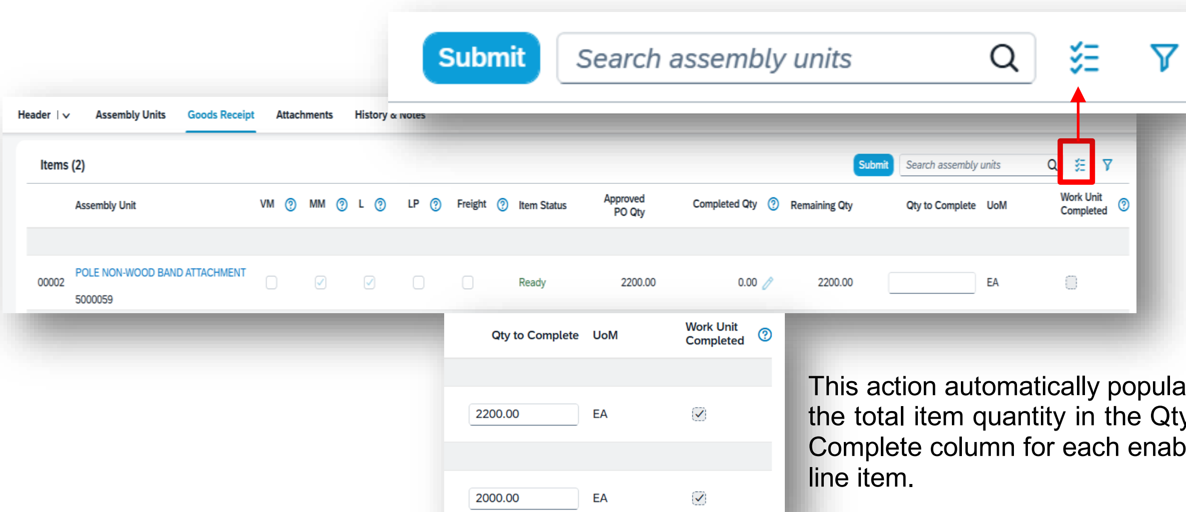


After the reversal, **Completed Qty** is **40** and **Remaining Qty** is **60—10** units were reversed.

24.5 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.

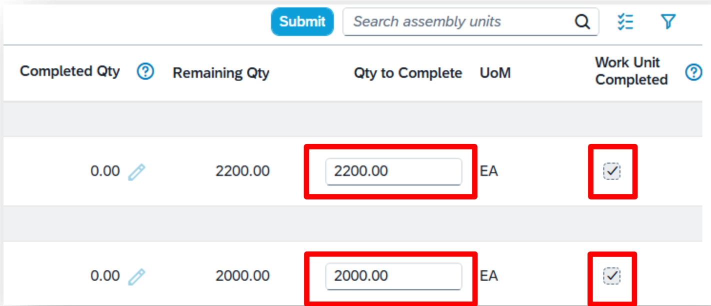
- ➢ On the Goods Receipt tab, click the Complete All button located in the top-right area of the table, next to the Search Assembly Units field (icon with three lines and check marks).



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

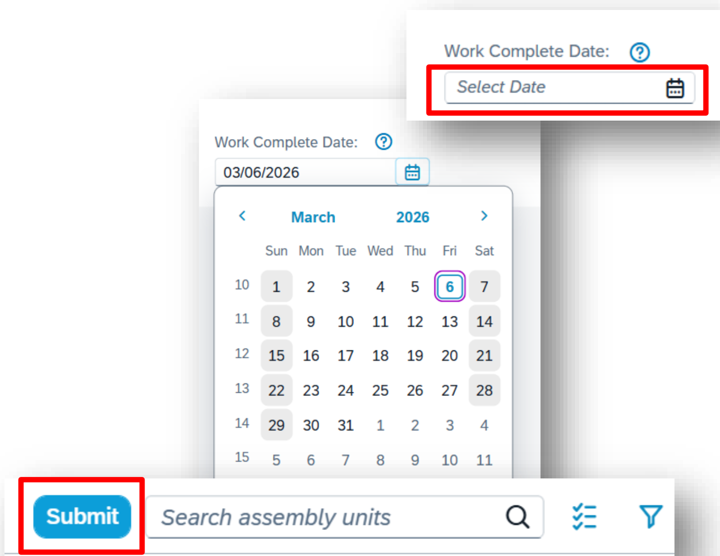


Selecting the Work Unit Completed checkbox indicates that this will be the final goods receipt for this line. Entering a Qty to Complete that is equal to the Remaining Qty will automatically check the Work Unit Completed checkbox.

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 Lumen's deadline 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.