



Purchasing Activities

Creating a Change Request

Overview:

Understanding the Change Request Creation Process

This tutorial provides instructions for creating change requests.

The ability to create changes in OMNI will depend on the status of your order as well as the type of order. If you are having trouble submitting your change through OMNI, you may need to submit a paper change request (<http://purchasing.fsu.edu/content/download/43463/299357>) form located on the Purchasing Web Site.

Once a PO is created changes to Budget Information, adding a line and Vendor must be done using the change request form.

Scenario:

In this topic, you will learn the steps to create a change request.

Key Information:

Requisition Number
Information to be updated

The screenshot displays the Florida State University OMNI portal. At the top, there is a search bar and navigation links for Home, Personalize Content, and Sign out. The main content area is divided into several sections:

- Employee Central:** Includes links for Financials, HR/Payroll, and Resources and Applications.
- OMNI FINANCIALS 9.1:** Features a link for Financials 9.1.
- OMNI HR 9.0:** Features a link for Human Resources 9.0.
- OMNI e-Market:** Features a link for OMNI e-Market.
- FSU Help Desk:** Features a link for FSU Help Desk.
- FSU Budget Crisis Committee:** Contains an important announcement regarding faculty participation in the Budget Crisis Committee.
- FSU Releases Free App:** Promotes a free app for iPhone, iPad, and BlackBerry.

The browser's address bar shows the URL: https://qa.portal.omni.fsu.edu/psps/psnaep/EMPLOYEE/EMPL/s/WEBLIB_EO_PE_PORTAL_HOMEPAGE_FieldFormula_1Script



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Step	Action
1.	Click the Financials 9.1 link.
2.	Click the Main Menu button.
3.	Click the eProcurement menu.
4.	Click the Manage Requisitions link.

Manage Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: FSU01 Request Name: Request Status: All but Complete Budget Status: Date From: Date To: 02/13/2011 Requester: SSEMINOLE Entered By: MFELDMAN PO ID: Search Clear

Requisitions

To view the life span and line items for a requisition, click the Expand triangle icon.
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Status	Budget	Total	
0000612167	0000612167	FSU01	02/13/2011	PO(s) Dispatched	Valid	642.00 USD	<Select Action> Go
0000612186	0000612186	FSU01	02/13/2011	Pending	Not Chk'd	386.84 USD	<Select Action> Copy Requisition Go
0000612165	0000612165	FSU01	02/13/2011	PO(s) Dispatched	Valid	237.40 USD	Edit Requisition Go
0000612164	0000612164	FSU01	02/13/2011	PO(s) Dispatched	Valid	649.00 USD	Receive Order Go
0000612163	0000612163	FSU01	02/13/2011	Pending	Not Chk'd	250.00 USD	View Approvals Go
0000612162	0000612162	FSU01	02/13/2011	Pending	Not Chk'd	178.00 USD	View Printable Version Go
0000612181	0000612181	FSU01	02/13/2011	Pending	Not Chk'd	1,590.00 USD	<Select Action> Go
0000612160	0000612160	FSU01	02/13/2011	Pending	Not Chk'd	3,860.00 USD	<Select Action> Go
0000612159	0000612159	FSU01	02/13/2011	Pending	Not Chk'd	454.34 USD	<Select Action> Go
0000612158	0000612158	FSU01	02/13/2011	Pending	Not Chk'd	400.00 USD	<Select Action> Go
0000612136	0000612136	FSU01	02/02/2011	Pending	Not Chk'd	2,119.30 USD	<Select Action> Go

Step	Action
5.	Find the desired Requisition and click the Edit Requisition list item for the corresponding Requisition.



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Search FLORIDA STATE
Web Search GO

Manage Requisitions

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: FSU01 Requisition Name:

Requestion ID: Request Status: All but Complete Budget Status:

Date From: Date To: 02/13/2011



Requester: SSEMINOLE Entered By: MFELDMAN PO ID:

Search Clear

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon.
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Status	Budget	Total	
0000612167	0000612167	FSU01	02/13/2011	PO(s) Dispatched	Valid	642.00 USD	Edit Requisition Go
0000612166	0000612166	FSU01	02/13/2011	Pending	Not Chk'd	386.84 USD	<Select Action> Go
0000612165	0000612165	FSU01	02/13/2011	PO(s) Dispatched	Valid	237.40 USD	<Select Action> Go
0000612164	0000612164	FSU01	02/13/2011	PO(s) Dispatched	Valid	649.00 USD	<Select Action> Go
0000612163	0000612163	FSU01	02/13/2011	Pending	Not Chk'd	250.00 USD	<Select Action> Go
0000612162	0000612162	FSU01	02/13/2011	Pending	Not Chk'd	178.00 USD	<Select Action> Go
0000612161	0000612161	FSU01	02/13/2011	Pending	Not Chk'd	1,590.00 USD	<Select Action> Go
0000612160	0000612160	FSU01	02/13/2011	Pending	Not Chk'd	3,860.00 USD	<Select Action> Go
0000612159	0000612159	FSU01	02/13/2011	Pending	Not Chk'd	454.34 USD	<Select Action> Go
0000612158	0000612158	FSU01	02/13/2011	Pending	Not Chk'd	400.00 USD	<Select Action> Go
0000612136	0000612136	FSU01	02/02/2011	Pending	Not Chk'd	2,119.30 USD	<Select Action> Go

Step	Action
6.	Click the Go button. 
7.	You will receive this pop up message once your requisition has entered approval workflow. Click the OK button to proceed. 



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Favorites | Main Menu

Edit Requisition

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: FSU01 Florida State University
Requester: SSEMINOLE SEMINOLE, SUSIE *Currency: USD
Requisition Name: 0000612158 Priority: Mediu

Line	Description	Vendor Name	Quantity	UOM	Price
1	Line 1	BATTERY SOURCE	10.0000	Each	10.00000
2	Line 2	BATTERY SOURCE	10.0000	Each	10.00000
3	Line 3	BATTERY SOURCE	10.0000	Each	10.00000
4	Line 4	BATTERY SOURCE	10.0000	Each	10.00000

Select All / Deselect All

Total Amount: 40
Pre-Encumbrance Balance: 0

Comments
original comments on Req.

Send to Vendor Show at Receipt Shown at Voucher Approval Justification

Check Budget Save & submit Save & preview approvals Cancel Changes

Requisition Summary

Description	Qty	UOM
Line 1	10	EA
Line 2	10	EA
Line 3	10	EA
Line 4	10	EA

Total Lines: 4
Total Amount (USD): 400.00

Step	Action
8.	<p>Click the Description link.</p> <p>NOTE: If this is an eMarket order it may punch back out to eMarket. You cannot make changes on eMarket orders and will need to contact Purchasing for assistance.</p> <p>Line 1</p>



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1. Define Requisition 2. Add Items and Services 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Web Special Request

Special Item

*Item Description: Line 1

*Price: 15.00000 *Currency: USD

*Quantity: 10.0000 *Unit of Measure: EA

*Category: 11110000 Due Date:

Vendor ID: 0000000675 Suggest New Vendor

Vendor Name: BATTERY SOURC

Requisition Summary


Description	Qty	UOM
Line 1	10	EA
Line 2	10	EA
Line 3	10	EA
Line 4	10	EA

Total Lines: 4
Total Amount (USD): 400.00

Additional Information

Send to Vendor Show at Receipt Show at Voucher

OK Cancel Add or Edit New Type

Step	Action
9.	<p>Enter the desired Price.</p> <p>Scenario: The vendor has contacted you and your price was from an old catalog.</p> <p>For the purpose of this example enter "15" into the Price field.</p>
10.	<p>Click the OK button.</p> <p></p>



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SEARCH FLORIDA STATE
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1. Define Requisition 2. Add Items and Services 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: FSU01 Florida State University
Requester: SSEMINOLE SEMINOLE, SUSIE
Requisition Name: 0000612158
Currency: USD
Priority: Mediu

Line	Description	Vendor Name	Quantity	UOM	Price
1	Line 1	BATTERY SOURCE	10.0000	Each	15.00000
2	Line 2	BATTERY SOURCE	10.0000	Each	10.00000
3	Line 3	BATTERY SOURCE	10.0000	Each	10.00000
4	Line 4	BATTERY SOURCE	10.0000	Each	10.00000

Total Amount: 450000.00
Pre-Encumbrance Balance: 0.00

Comments
original comments on Req.

Send to Vendor Show at Receipt Shown at Voucher Approval Justification

Check Budget
Save & submit Save & preview approvals Cancel Changes

Step	Action
11.	<p>Click in the Comments Field.</p> <p>For the purpose of this example enter the reason for the change, date of the change initials of the person creating the change and if you would like this to be dispatched to the vendor.</p> <p>Enter: "Ordered from old catalog, 2/17/11, SS, resend this to the vendor ".</p> <p>Note: Always specify here if this should dispatch to the vendor again or not.</p>
12.	Enter an explanation of the change into the Comments Field.
13.	<p>If you wish for these comments to print on the PO, click the Send to Vendor option.</p> <p><input checked="" type="checkbox"/> Send to Vendor</p>
14.	<p>Click the Approval Justification option.</p> <p>This will allow the approvers and buyers to see the comments for your change request.</p> <p><input checked="" type="checkbox"/> Approval Justification</p>
15.	<p>Click the Save & submit button.</p> <p><input checked="" type="checkbox"/> Save & submit</p>



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Requisition Approval Workflow

Line 1: Pending
0521-2740-NW NW10, NW16, NW25, NW40 & NW50 (5 Each) of Buna-N O'Ring Kit [View/Hide Comments](#)

Req Approval Workflow Path

Pending
Multiple Approvers
Project Approvers

Comment History

Line 2: Pending
NW40-150-MH30 NW40 to 30" Flexible Metal Hose, Thin Wall [View/Hide Comments](#)

Req Approval Workflow Path

Pending
Multiple Approvers
Project Approvers

Comment History

Line 3: Pending
NW40-Q150 NW40 to 1 1/2" Tube Size Quick Coupling, 304 S/S [View/Hide Comments](#)

Req Approval Workflow Path

Pending
Multiple Approvers
Project Approvers

Comment History

Line 4: Pending
NW50-200-MH30-OS OVERSTOCK - NW50 to 30" Flexible Metal Hose, Thin Wall [View/Hide Comments](#)

Req Approval Workflow Path

Pending
Multiple Approvers

Requisition Summary

Description	Qty	UOM
0521-2740-NW NW10, NW16,...	5	EA
NW40-150-MH30 NW40 to 30...	1	EA
NW40-Q150 NW40 to 1 1/2" Tu...	1	EA
NW50-200-MH30-OS OVERSTO...	1	EA
PP-CW NW Aluminum Wing ...	1	EA
Total Lines:	5	
Total Amount (USD):	687.00	

https://qa.financials.omni.fsu.edu/psp/sqna12/EMPLOYEE/ERP/h/?tab=DEFAULT

Step	Action
16.	Click the Home link. Home
17.	Congratulations! You have completed this topic.