



### Purchasing Activities

## Creating a Change Request to Item Category

#### 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.

#### Procedure

For the purpose of this example you have received a call from your budget manager to let you know that this should have been coded as a repair of existing equipment and to change it to a repair category.

#### Scenario:

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

#### Key Information:

Requisition Number  
Information to be updated





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

**Manage Requisitions**

Search Requisitions

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

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

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
0000612166	0000612166	FSU01	02/13/2011	Pending	Not Chk'd	386.84 USD	<Select Action> Copy Requisition Go
0000612185	0000612185	FSU01	02/13/2011	PO(s) Dispatched	Valid	237.40 USD	Edit Requisition Receive Order View Approvals View Printable Version 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
5.	Find the desired Requisition and click the <b>Edit Requisition</b> list item for the corresponding Requisition. 



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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


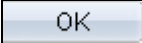
Requester: SSEMINOLE Entered By: MFELDMAN PO ID:


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 <b>Go</b> button. 
7.	You will receive this pop up message once your requisition has entered approval workflow.  Click the <b>OK</b> button to proceed. 

Step	Action
8.	Click the <b>Description</b> link for desired line.  For the purpose of this example, click the <b>Description</b> link for line 2. 



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### Edit Requisition

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: PL2650-1001 Polyethylene individual molecular weights nominal Mp 750 g/mol

\*Price: 89.00000 \*Currency: USD

\*Quantity: 1.0000 \*Unit of Measure: EA

\*Category: 41120000 [Look up Category \(Alt+S\)](#) Due Date: 02/28/2011

Vendor ID: 0000000557 Suggest New Vendor

Vendor Name: AGILENT TECHN




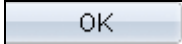
#### Additional Information

Send to Vendor  Show at Receipt  Show at Voucher

OK Cancel Add or Edit New Type

Requisition Summary	
Description	Qty UOM
PL2650-4001 Polyethylen...	1 EA
PL2650-1001 Polyethylen...	1 EA
<b>Total Lines:</b>	<b>2</b>
<b>Total Amount (USD):</b>	<b>178.00</b>

javascript:pAction\_win0(document.win0,'PV\_REQ\_SR\_WRK\_CATEGORY\_CD#prompt\$0');

Step	Action
9.	Click the <b>Look up Category</b> button. 
10.	Enter the desired <b>Category</b> .  For the purpose of this example enter " <b>4112</b> " into the <b>Category</b> field.  <b>NOTE:</b> You may also search by description by changing "begins with" to "contains" and typing the first 3-4 letters of your item. For example, enter "main" for maintenance.
11.	Click the <b>Look Up</b> button. 
12.	For the purpose of this example, click the <b>Lab supp/ fixtures-maint</b> link. 
13.	Click the <b>OK</b> button. 
14.	Enter an explanation of the change into the <b>Comments</b> field.



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### 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: F5U01 Florida State University  
Requester: SSEMINOLE SEMINOLE, SUSIE \*Currency: USD  
Requisition Name: 0000612162 Priority: Medium

Line	Description	Vendor Name	Quantity	UOM	Price
1	PL2650-4001 Polyethylene ind	AGILENT TECHNOLOGIES INC	1.0000	Each	89.00000
2	PL2650-1001 Polyethylene in	AGILENT TECHNOLOGIES INC	1.0000	Each	89.00000

Select All / Deselect All

Total Amount: 178.00  
Pre-Encumbrance Balance: 0.00

Modify Line / Shipping / Accounting




#### Comments

This will be used to repair a custom piece of equipment that was broken. Do not resend to vendor. SS 2/17/11

Send to Vendor  Show at Receipt  Shown at Voucher  Approval Justification

Check Budget

Save & submit Save & preview approvals Cancel Changes

Step	Action
15.	For comments to print on the change request, click the <b>Send to Vendor</b> option. 
16.	To send your change request comments to the approvers and buyers click the <b>Approval Justification</b> option. 
17.	Click the <b>Save &amp; submit</b> button. 



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### Confirmation

**Requested For:** SEMINOLE, SUSIE **Number of Lines:** 1

**Requisition Name:** 0000612162 **Total Amount:** 178.00

**Requisition ID:** 0000612162 **Pre-Encumbrance Balance:** 0.00

**Business Unit:** FSU01 **Justification:** This will be used to repair a custom piece of equipmen  
Do not resend to vendor. SS 2/17/11

**Status:** See Lines

**Priority:** Medium

**Budget Status:** [Valid](#)

### Requisition Summary

Description	Qty	UOM
PL2650-4001 Polyethylene...	1	EA
PL2650-1001 Polyethylen...	1	EA
<b>Total Lines:</b>	<b>2</b>	
<b>Total Amount (USD):</b>	<b>178.00</b>	

### Requisition Approval Workflow

**Line 1: Pending**  
PL2650-4001 Polyethylene individual molecular weights nominal Mp 540 g/mol [View/Hide Comments](#)

**Req Approval Workflow Path**

**Pending**  
[Multiple Approvers](#)  
Dept Level 1 Approvers

**Comment History**

**Line 2: Pending**  
PL2650-1001 Polyethylene individual molecular weights nominal Mp 750 g/mol [View/Hide Comments](#)

**Req Approval Workflow Path**

**Pending**  
[Multiple Approvers](#)  
Dept Level 1 Approvers

https://qa.financials.omni.fsu.edu/psp/sqna02/EMPLOYEE/ERP/h/?tab=DEFAULT

Step	Action
18.	Click the <b>Home</b> link. <b>Home</b>
19.	<b>Congratulations!</b> You have completed this topic.