



### Purchasing Activities

## Creating a Change Request to Cancel Lines

#### 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

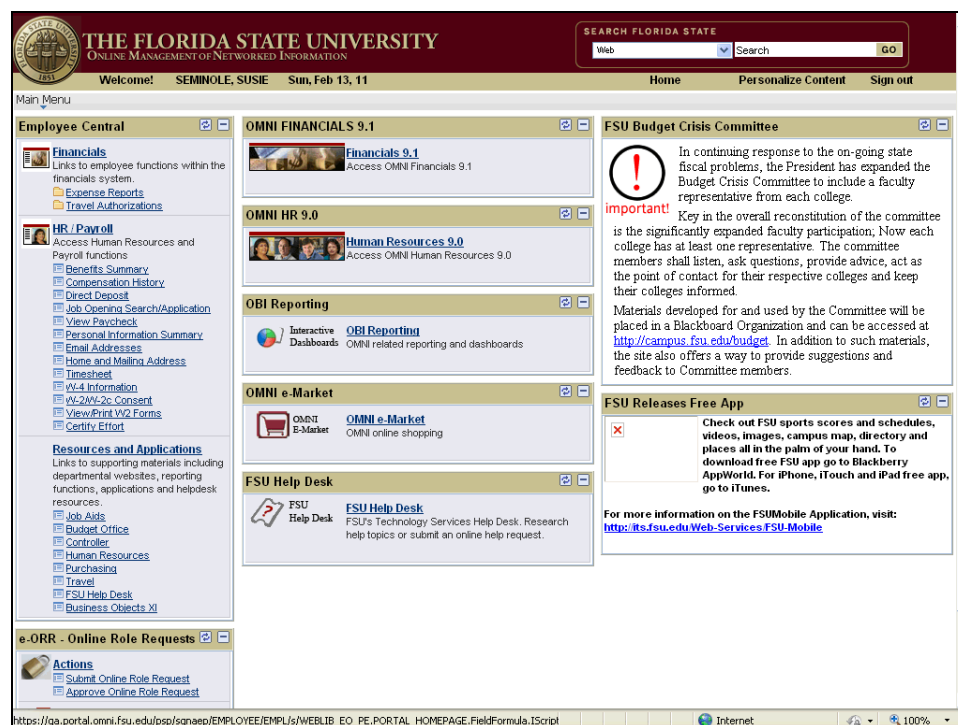
For the purpose of this change the vendor contacted you and let you know that they could no longer supply this item so we will cancel the line.

#### 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. <a href="#">Financials 9.1</a>
2.	Click the <b>Main Menu</b> button. <a href="#">Main Menu</a>
3.	Click the <b>eProcurement</b> menu. <a href="#">eProcurement</a>
4.	Click the <b>Manage Requisitions</b> link. <a href="#">Manage Requisitions</a>

**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. <a href="#">Edit Requisition</a>



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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 <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. 



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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: FSU01 Florida State University  
Requester: SSEMINOLE SEMINOLE, SUSIE Currency: USD  
Requisition Name: Smith Lab - Research Files Priority: Medium

Line	Description	Vendor Name	Quantity	UOM	Price
1	Item # 12332 Live Flies	BRAINTREE SCIENTIFIC	1.0000	Each	100.00000
2	Item # 12322 Fly Food	BRAINTREE SCIENTIFIC	1.0000	Each	20.00000
					Total Amount: 120.00000
					Pre-Encumbrance Balance: 0.00000

Requisition Summary

Description	Qty	UOM
Item # 12332 Live Flies	1	EA
Item # 12322 Fly Food	1	EA
Total Lines:	2	
Total Amount (USD):	120.00	

Comments

Send to Vendor  Show at Receipt  Shown at Voucher  Approval Justification

Check Budget

Save & submit Save & preview approvals Cancel Changes

Step	Action
8.	<p>Enter an explanation of the change into the <b>Comments</b> field. Always include the reason for change, change date, your initials or name and if this should dispatch to the vendor.</p> <p>For the purpose of this example, enter "<b>Canceling line 2 vendor cannot supply. 2/17/11, SS, Do not dispatch to vendor.</b>" into the <b>Comments</b> field.</p> <p><b>NOTE:</b> You must specify in this area if you want the change request to go to the Vendor. In this case the vendor did not need an updated copy when they called you.</p>
9.	<p>If you want the above comments to go to the vendor, click the <b>Send to Vendor</b> option.</p> <p><input checked="" type="checkbox"/> Send to Vendor</p>
10.	<p>Click the <b>Approval Justification</b> option to ensure that your change request comments go to the approvers and buyers.</p> <p><input type="checkbox"/> Approval Justification</p>
11.	<p>Click the <b>Save &amp; submit</b> button.</p> <p><input type="button" value="Save &amp; submit"/></p>



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Business Unit: FSU01  
Status: Approved  
Priority: Medium  
Budget Status: Valid

**Requisition Approval Workflow**

**Line 1: Approved**  
Item # 12332 Live Files  
Req Approval Workflow Path  
Approved  
PAYNE, JIMMY  
Dept Level 1 Approvers  
02/17/11 - 10:50 AM

**Line 2: Approved**  
Item # 12322 Fly Food  
Req Approval Workflow Path  
Approved  
PAYNE, JIMMY  
Dept Level 1 Approvers  
02/17/11 - 10:50 AM

Buttons: Submit, Edit Requisition, Apply Approval Changes, Check Budget

Links: View printable version, Manage Requisitions, Create New Requisition

**Requisition Summary**

Description	Qty	UOM
Item # 12332 Live Files	1	EA
Item # 12322 Fly Food	1	EA
<b>Total Lines:</b>	<b>2</b>	
<b>Total Amount (USD):</b>	<b>120.00</b>	

Step	Action
12.	Click the <b>Manage Requisitions</b> link. <a href="#">Manage Requisitions</a>

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Favorites: Main Menu > eProcurement > Manage Requisitions

**Manage 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: 02/10/2011  
Date To: 02/17/2011  
Requester: SSEMINOLE  
Entered By:   
PO ID:





Buttons: 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	
0000612170	Smith Lab Research Files	FSU01	02/15/2011	Pending	Valid	120.00 USD	<Select Action> Go
0000612169	Smith Lab - Research Files	FSU01	02/14/2011	PO(s) Dispatched	Valid	120.00 USD	<Select Action> Go
0000612168	0000612168	FSU01	02/14/2011	PO(s) Dispatched	Not Chk'd	649.00 USD	<Select Action> Go
0000612167	0000612167	FSU01	02/13/2011	PO(s) Dispatched	Not Chk'd	727.00 USD	<Select Action> Go
0000612166	0000612166	FSU01	02/13/2011	Pending	Valid	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	PO(s) Dispatched	Valid	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	Valid	3,860.00 USD	<Select Action> Go



Step	Action
13.	Click the <b>Expand Section</b> button (to the left of the Requisition ID link) for the same requisition to cancel lines. 
14.	Click the <b>Cancel</b> button for the lines that you wish to cancel.  <b>NOTE:</b> If the lines have been received in OMNI, they may <u>not</u> be cancelled. If you need to cancel multiple lines you will need to budget check between lines using the select action drop down box.  To release the encumbrance, you can reduce the line quantity to equal the received quantity. 
15.	Fully received and fully matched PO's will be closed weekly. To close PO's not meeting this status send a change request form ( <a href="http://purchasing.fsu.edu/content/download/43463/299357">http://purchasing.fsu.edu/content/download/43463/299357</a> ) located on the Purchasing Web Site.
16.	Click the <b>OK</b> button. 
17.	Click the <b>Home</b> link. 
18.	<b>Congratulations!</b> You have completed this topic.