



### *Purchasing Activities*

## Creating a Change Request to Vendor

#### 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 purchasing has requested that you update the vendor on your order to be the contract vendor.

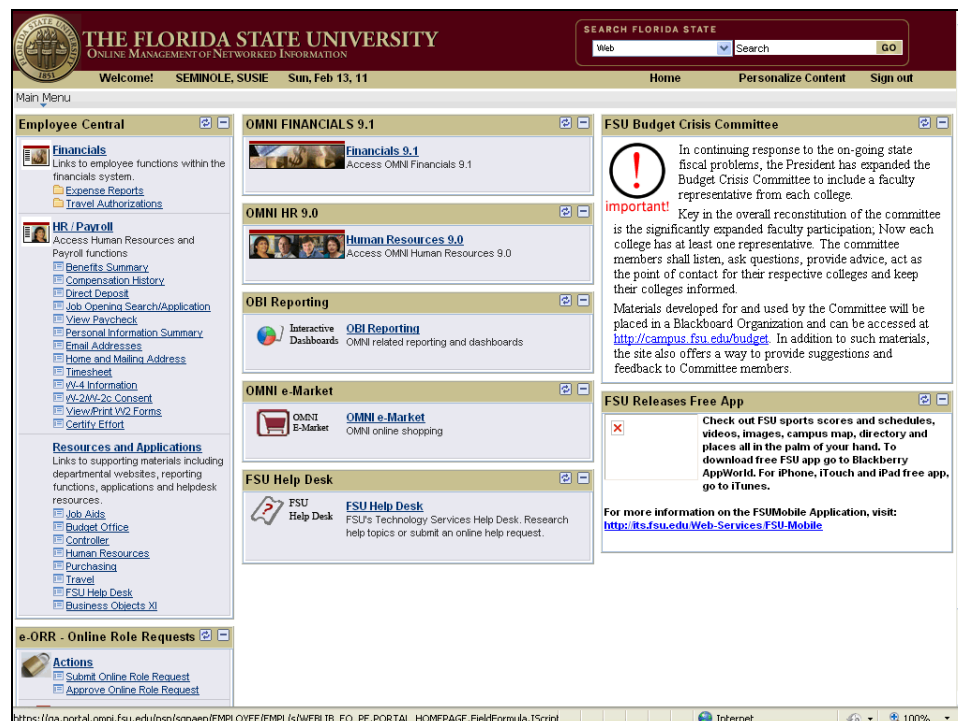
#### Scenario:

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**

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 Go
0000612164	0000612164	FSU01	02/13/2011	PO(s) Dispatched	Valid	649.00 USD	Receive Order View Approvals View Printable Version 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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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 Files	BRAINTREE SCIENTIFIC	1.0000	Each	100.00000
2	Item # 12322 Fly Food	BRAINTREE SCIENTIFIC	1.0000	Cello Pack	20.00000
					Total Amount: 120.00000
					Pre-Encumbrance Balance: 0.00000

Requisition Summary

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

Comments

Send to Vendor  Show at Receipt  Shown at Voucher  Approval Justification

Modify Line / Shipping / Accounting

Step	Action
8.	<p>Click the <b>Select All / Deselect All</b> link.</p> <p><b>NOTE:</b> The Vendor cannot be updated here once a PO is created. Please submit a paper change request form if your PO has already been created.</p> <p><a href="#">Select All / Deselect All</a></p>
9.	<p>Click the <b>Modify Line / Shipping / Accounting</b> button.</p> <p><input type="button" value="Modify Line / Shipping / Accounting"/></p>



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Create Requisition [Help](#)

### Modify Line / Shipping / Accounting

**Line Information**

**Note:** The information below does not reflect the data in the selected requisition lines. When the 'Apply' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines.

Vendor ID:  Vendor Location:

Buyer:  **Vendor Lookup**

**Shipping Information**

Ship To:  [Modify Onetime Address](#)

Due Date:  Attention:


**Accounting Information** [Chartfields1](#) [Details](#) [Asset Information](#) [Customize](#) [Find](#) [First](#) [1 of 1](#) [Last](#)

Percent	Location	GL Unit	Dept	Fund	PC Bus Unit	Project	Activity
1	<input type="text"/>	F5U01	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

[Load Values From Defaults](#)

Apply Cancel

javascript:submitAction\_win0(document.win0,'VENDOR\_PNL5\_WRK\_VENDOR\_LOOKUP\_PB?'); Internet 100%

Step	Action
10.	Click the <b>Vendor Lookup</b> button. 

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Vendor Search [Help](#)

Vendor ID:  Find

Name:  Reset

Short Vendor Name:

Alternate Vndr Name:

City:

Country:  State:

Postal Code:

[Enter search criteria to find a vendor.](#)

[Return to Modify Line / Shipping / Accounting](#)

**Requisition Summary**

Description	Qty	UOM
Item # 12332 Live Files	1	EA
Item # 12322 Fly Food	1	PK



Total Lines: 2  
Total Amount (USD): 120.00


Done Internet 100%



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## Training Guide

Step	Action
11.	Search for the desired Vendor.  For the purpose of this example, enter " <b>VWR</b> " into the <b>Short Vendor Name</b> field.  <b>NOTE:</b> Only enter the first 3-4 letters of the vendor's name.
12.	Click the <b>Find</b> button.  
13.	Select the appropriate <b>Vendor ID</b> link.  For the purpose of this example click the <b>000000664</b> link.  



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Modify Line / Shipping / Accounting

**Line Information**

Note: The information below does not reflect the data in the selected requisition lines. When the 'Apply' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines.

Vendor ID: 000000664 Vendor Location: 001  
Buyer: Category:

**Shipping Information**

Ship To: Modify Onetime Address  
Due Date: Attention:

**Accounting Information**


Charfield#1	Details	Asset Information	Percent	Location	GL Unit	Dept	Fund	PC Bus Unit	Project	Activity
1					FSU01					

Load Values From Defaults

Apply Cancel  
OK Push Button

Requisition Summary

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

Step	Action
14.	Click the <b>Apply</b> button.  



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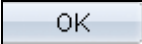
### Distribution Change Options

For the selected requisition lines, apply distribution changes to

- All Distribution Lines**  
Apply changes to all existing distribution lines.
- Matching Distribution Lines**  
Apply changes to each existing distribution line by matching the distribution line numbers.
- Replace Distribution Lines**  
Remove the existing distribution lines and replace with the distribution lines changes.

OK Cancel

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

Step	Action
15.	Click the <b>OK</b> button. 

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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 Files	WWR INTERNATIONAL LLC	1.0000	Each	100.00000
2	Item # 12322 Fly Food	WWR INTERNATIONAL LLC	1.0000	Cello Pack	20.00000

Total Amount: 120.00000  
Pre-Encumbrance Balance: 0.00000

Modify Line / Shipping / Accounting De


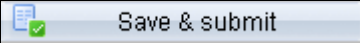
Comments


Send to Vendor  Show at Receipt  Shown at Voucher  Approval Justification

Check Budget

Save & submit Save & preview approvals Cancel Changes



Step	Action
16.	<p>Enter an explanation of the change into the <b>Comments</b> field.</p> <p>Always include Reason for change, Due Date, Your initials and if this should go back to the vendor.</p> <p>For the purpose of this example enter "<b>Purchasing found better pricing with our contract vendor, 2/17/11, SS</b>". Vendor changes should always go to the vendor unless they are for payment purposes only.</p>
17.	<p>Click the <b>Approval Justification</b> option to ensure the above comments go to the Approvers and Buyers.</p> 
18.	<p>Click the <b>Save &amp; submit</b> button.</p> 

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