



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.

Procedure

In this scenario you realized while printing the Po out for your file that you are having it shipped to the wrong location. You need to make the change to notify the vendor.

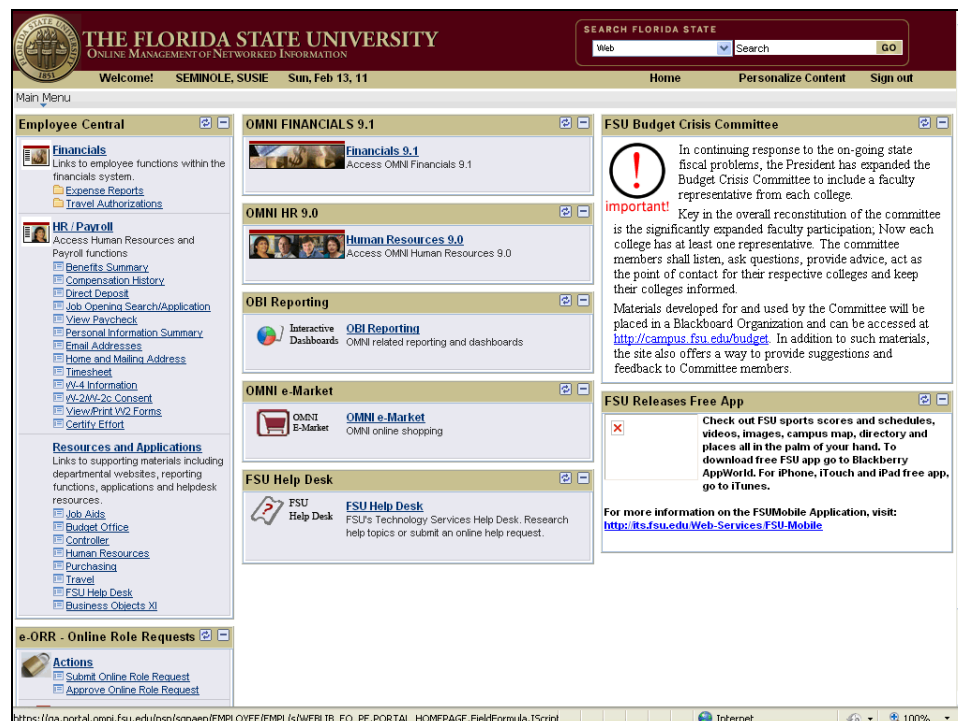
Scenario:

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

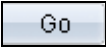

Requester: SSEMINOLE Entered By: MFELDMAN PO ID:

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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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: 0000612168 Track Batch: 1 Priority: Medium

Line	Description	Vendor Name	Quantity	UOM	Price
1	Sch 80 T6061 T6 Al pipe_0.500	SHAW STAINLESS AND ALLOY PIPING	3.0000	Feet	177.50000
2	Sch 40 T6061 T6 pipe	SHAW STAINLESS AND ALLOY PIPING	2.0000	Feet	39.75000
3	Shipping	SHAW STAINLESS AND ALLOY PIPING	1.0000	Each	37.00000

Total Amount: 64
Pre-Encumbrance Balance: 0



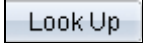

Requisition Summary

Description	Qty	UOM
Sch 80 T6061 T6 Al pipe, 0...	3	FT
Sch 40 T6061 T6 pipe	2	FT
Shipping	1	EA
Total Lines:	3	
Total Amount (USD):	649.00	

Comments
Due Date changed because it is on back order until then. Do not resend to vendor. SS 2/17/11

Send to Vendor Show at Receipt Shown at Voucher Approval Justification

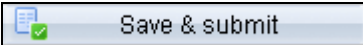
Check Budget Save & submit Save & preview approvals Cancel Changes


Step	Action
8.	For the desired line, click the Expand Section button. 
9.	Click the Look up Ship To button. 
10.	Search for the correct Ship To Location . For the purpose of this example, enter " sbio " into the Ship To Location field.
11.	Click the Look Up button. 
12.	For the purpose of this example, click the BIOLOGICAL SCIENCE STOCKROOM link. NOTE: Repeat these steps to update the Ship To Location for every line. 



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Step	Action
13.	<p>Enter an explanation of the change into the Comments field to include Reason for change, Date of change, your initials or name and if this should go back to the vendor.</p> <p>For the purpose of this example, enter "Accidentally entered old ship to. Please send to vendor. SS 1/17/11" into the Comments field.</p> <p>NOTE: Always specify here if the change request needs to be dispatched to the vendor. Be sure and check send to vendor with your comments so that the vendor knows why they are receiving the PO again.</p>
14.	<p>Click the Save & submit button.</p> 

Step	Action
15.	<p>Click the Home link.</p> 
16.	<p>Congratulations! You have completed this topic.</p>