



Purchasing Activities

Creating a Change Request for (UOM) Unit of Measure

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.

For this example the invoice had a different UOM than the PO so you are updating the PO to match the invoice for payment purposes.

Key Information:

Requisition Number
Information to be updated

The screenshot displays the OMNI web application interface. At the top, it features the Florida State University logo and the text "THE FLORIDA STATE UNIVERSITY ONLINE MANAGEMENT OF NETWORKED INFORMATION". A search bar is located in the top right corner. Below the header, there is a navigation menu with options like "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:** Access OMNI Financials 9.1.
- OMNI HR 9.0:** Access OMNI Human Resources 9.0.
- OBI Reporting:** Interactive Dashboards for OMNI related reporting and dashboards.
- OMNI e-Market:** OMNI online shopping.
- FSU Help Desk:** FSU's Technology Services Help Desk. Research help topics or submit an online help request.
- FSU Budget Crisis Committee:** Important news regarding the committee's expansion and participation.
- FSU Releases Free App:** Information about the FSU mobile application available on Blackberry AppWorld, iPhone, and iPad.

The bottom of the page shows a browser address bar with the URL: https://qa.portal.omni.fsu.edu/psp/sqnaep/EMPLOYEE/EMPL/s/WEBLIB_EO_PE_PORTAL_HOMEPAGE.FieldFormula.IScript



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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 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	<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

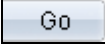

Requester: SSEMINOLE Entered By: MFELDMAN PO ID:

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
0000612168	0000612168	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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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: 0000612160
Priority: Medium
Currency: USD

Line	Description	Vendor Name	Quantity	UOM	Price
1	Science Color Charge - Insight	SHERIDAN PRESS	1.0000	Each	650.00000
2	Science Color Charges, 2&3	SHERIDAN PRESS	2.0000	Each	450.00000
3	Science Reprint Order - 300.co	SHERIDAN PRESS	300.0000	Each	7.70000

Total Lines: 3
Total Amount (USD): 3,860.00

Comments

Send to Vendor Show at Receipt Shown at Voucher Approval Justification

Step	Action
8.	<p>Click the Description link for desired line.</p> <p>For the purpose of this example, click the Description link for line 3.</p> <p>Science Reprint Order - 300 co</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: Science Reprint Order - 300 copies at 5 pages each

*Price: 7.70000 *Currency: USD

*Quantity: 300.00000 *Unit of Measure: EA

*Category: 55101500 Due Date: 02/28/2011 [Look up Unit of Measure \(Alt+F5\)](#)

Vendor ID: 0000009362 [Suggest New Vendor](#)

Vendor Name: SHERIDAN PRES


Additional Information

Send to Vendor Show at Receipt Show at Voucher

OK Cancel Add or Start New Type

Requisition Summary

Description	Qty	UOM
Science Color Charge - Ins...	1	EA
Science Color Charges, 2&3	2	EA
Science Reprint Order - 30...	300	EA
Total Lines:	3	
Total Amount (USD):	3,860.00	

Step	Action
9.	Click the Look up Unit of Measure button. 

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SEARCH FLORIDA STATE
Web Search GO

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: Science Reprint Order - 300 copies at 5 pages each

*Price: 7.70000 *Currency: USD

*Quantity: 300.00000 *Unit of Measure: EA

*Category: 55101500 Due Date: 02/28/2011 [Look up Unit of Measure \(Alt+F5\)](#)

Vendor ID: 0000009362 [Suggest New Vendor](#)

Vendor Name: SHERIDAN PRES

Additional Information

Send to Vendor Show at Receipt Show at Voucher

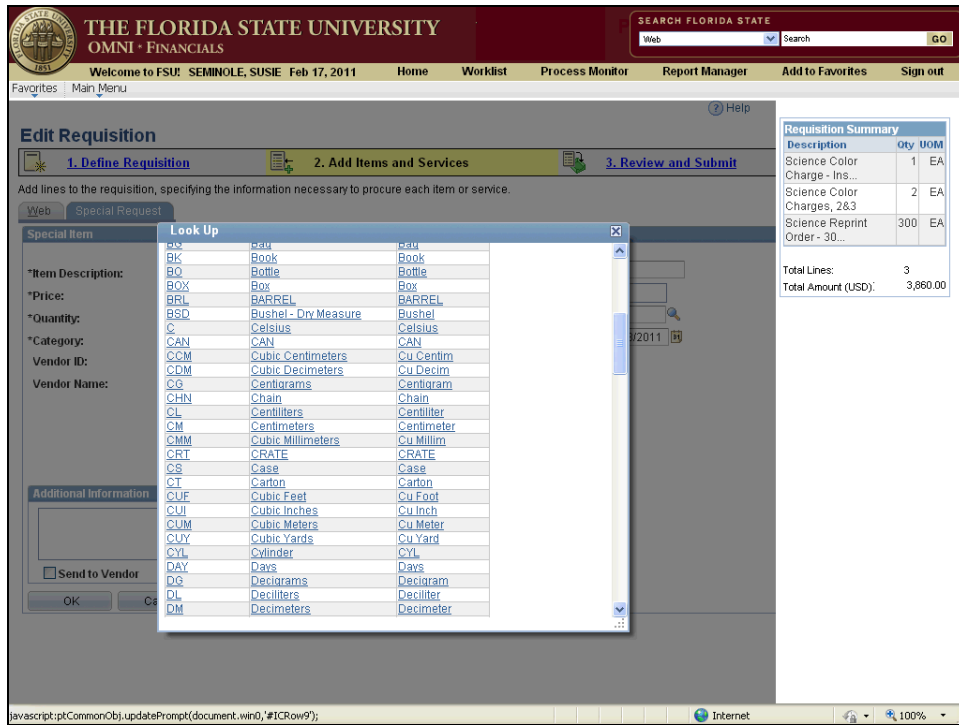
OK Cancel Add or Start New Type


Look Up

BK	Book	Book
BO	Bottle	Bottle
BOX	Box	Box
BRL	BARREL	BARREL
BSD	Bushel - Dry Measure	Bushel
C	Celsius	Celsius
CAN	CAN	CAN
CCM	Cubic Centimeters	Cu Centim
CDM	Cubic Decimeters	Cu Decim
CG	Centigrams	Centogram
CHN	Chain	Chain
CL	Centiliters	Centiliter
CM	Centimeters	Centimeter
CMM	Cubic Millimeters	Cu Millim
CRT	CRATE	CRATE
CS	Case	Case
CT	Carton	Carton
CUF	Cubic Feet	Cu Foot
CUI	Cubic Inches	Cu Inch
CUM	Cubic Meters	Cu Meter
CUY	Cubic Yards	Cu Yard
CYL	Cylinder	CYL
DAY	Days	Days
DG	Decigrams	Decigram
DL	Deciliters	Deciliter
DM	Decimeters	Decimeter



Step	Action
10.	Scroll down through the list to see all options. If this field is not editable contact Purchasing to assist you with this change.



Step	Action
11.	Select the correct Unit of Measure . For the purpose of this example click the Book link. Book
12.	Click the OK button. 
13.	Enter an explanation of the change into the Comments field to include your reason for change, date, your initials or name and if this should dispatch to the vendor again. NOTE: Be sure to specify here if this should dispatch to the vendor or not. In this case you already have the merchandise so the vendor would not need to see an updated PO as they may ship the items again.



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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 *Currency: USD
Requisition Name: 0000612160 Priority: Medium



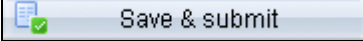
Line	Description	Vendor Name	Quantity	UOM	Price
1	Science Color Charge - Insight	SHERIDAN PRESS	1.0000	Each	650.00000
2	Science Color Charges, 2&3	SHERIDAN PRESS	2.0000	Each	450.00000
3	Science Reprint Order - 300.co	SHERIDAN PRESS	300.0000	Book	7.70000

Total Amount: 3,860.00000
Pre-Encumbrance Balance: 0.00000

Comments
Line 3 UOM updated for payment purposes, do not send 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
14.	If you want these comments to print on the PO, click the Send to Vendor option. 
15.	Select the Approval Justification option to allow your approvers and buyers to view the change request reason above. 
16.	Click the Save & submit button. 



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Favorites: Main Menu Help

Confirmation

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

Requisition Name: 0000612160 **Total Amount:** 3,860.00

Requisition ID: 0000612160 **Pre-Encumbrance Balance:**

Business Unit: FSU01 **Justification:** Line 3 UOM updated for payment purposes, do not set

Status: Pending 2/17/11

Priority: Medium

Budget Status: [Valid](#)

Description	Qty	UOM
Science Color Charge - Ins...	1	EA
Science Color Charges, 283	2	EA
Science Reprint Order - 30...	300	BK
Total Lines:	3	
Total Amount (USD):	3,860.00	

Requisition Approval Workflow

Line 1: Approved
Science Color Charge - Insight into the Mechanism of the Influenza A Proton Channel by Timothy Cross, 1 st

Req Approval Workflow Path

Approved
POAPPROVER, PAUL
Project Approvers
02/13/11 - 10:42 PM

Line 2: Approved
Science Color Charges, 283

Req Approval Workflow Path

Approved
POAPPROVER, PAUL
Project Approvers
02/13/11 - 10:42 PM

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

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