



Purchasing Activities

Creating a Change Request for Due Date

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

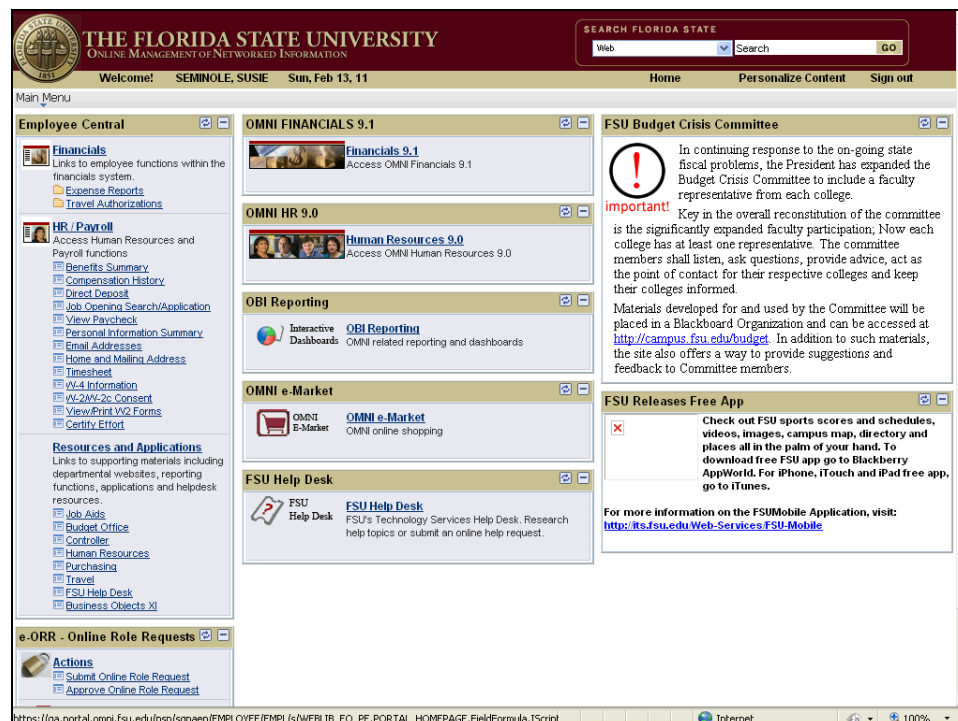
For the purpose of this example you will update the due date because it has passed and you need this left open to receive in the future but you do not want to see it on your receiving screen for the next three months.

Scenario:



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

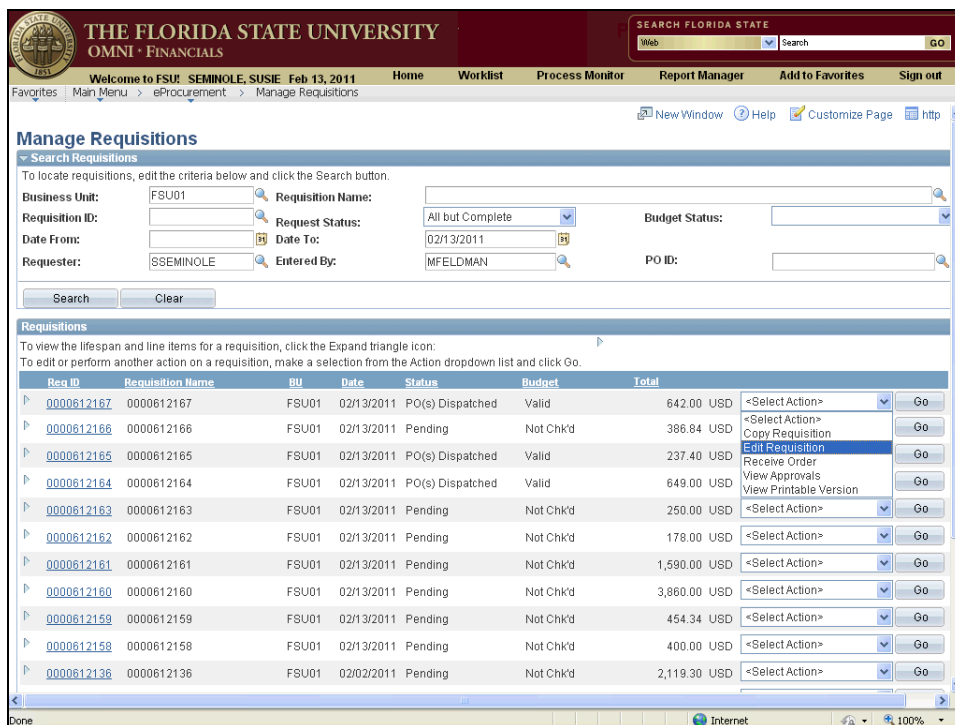
Key Information:

Requisition Number
Information to be updated





| Step | Action |
|------|--|
| 1. | Click the Financials 9.1 link. Financials 9.1 |
| 2. | Click the Main Menu button.  |
| 3. | Click the eProcurement menu.  |
| 4. | Click the Manage Requisitions link. Manage Requisitions |



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 Edit Requisition list item for the corresponding Requisition. Edit 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 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 |



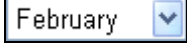
Total Lines: 3
Total Amount (USD): 649.00

Comments

Send to Vendor Show at Receipt Shown at Voucher Approval Justification

Check Budget Save & submit Save & preview approvals Cancel Changes

javascript:submitAction_win0(document.win0,'PV_REQ_LINE_WRK_PV_EXPAND_SECT#0');

| Step | Action |
|------|---|
| 8. | For the desired line, click the Expand Section button.  |
| 9. | Updated the Due Date on the desired line. Click the Choose a date button.  |
| 10. | Click the Month list.  |



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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 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 |

Shipping Line: 1 Due Date: 03 Quantity: 3.0000 Price: 177.50
Status: Active 'Ship To: SRF1A292
Attention To: Lee Windham
'Distribute By: Qty SpeedChart:

| Line | Dist Type | Location | Quantity |
|------|-----------|----------|----------|
| 1 | Processed | SRF1A292 | |

| 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

| Step | Action |
|------|--|
| 11. | For the purpose of this example, select March . |

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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 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 |




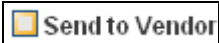


Shipping Line: 1 Due Date: 03 Quantity: 3.0000 Price: 177.50
Status: Active 'Ship To: SRF1A292
Attention To: Lee Windham
'Distribute By: Qty SpeedChart:

| Line | Dist Type | Location | Quantity |
|------|-----------|----------|----------|
| 1 | Processed | SRF1A292 | |

| 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



| Step | Action |
|------|---|
| 12. | For the purpose of this example, select 30 .  |
| 13. | You will receive a warning when your date is more than 30 days in the future. Click the OK button.  |
| 14. | Update the Due Date for the remaining lines by expanding the line details and repeating the date selection process. NOTE: You may choose different dates if different lines are expected at different times.  |
| 15. | Enter an explanation into the Comments field to explain the change. Include the reason for the change, date of change, your initials or name and if this should be dispatched to the vendor. NOTE: Always specify here if your change request needs to be dispatched to the vendor. If the vendor contacted you and requested that you update the due dates and they require a copy then send it again. Remember to check send to vendor with your comments so that the vendor knows why they are receiving this order again and does not double ship. |
| 16. | To send the above comments to the vendor, click the Send to Vendor option.  |
| 17. | Click the Approval Justification option to ensure that your Change Request Comments are visible for the approvers as well as buyers.  |
| 18. | Click the Save & submit button.  |



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Request For: SEMINOLE, SUSIE Number of Lines: 3

Requisition Name: 0000612168 Total Amount: 649.00 USD

Requisition ID: 0000612168 Pre-Encumbrance Balance: 0.000

Business Unit: FSU01 Justification: Due Date changed because it is on back order until then. Do not reselect vendor. SS 2/17/11

Status: Approved

Priority: Medium

Budget Status: [Valid](#)

Requisition Summary

| Description | Qty | UOM |
|--|---------------|-----|
| Sch 80 T6061 T6 AI pipe, 0.500 in wall | 3 | FT |
| Sch 40 T6061 T6 pipe | 2 | FT |
| Shipping | 1 | EA |
| Total Lines: | 3 | |
| Total Amount (USD): | 649.00 | |

Requisition Approval Workflow

Line 1: Approved
Sch 80 T6061 T6 AI pipe, 0.500 in wall

Req Approval Workflow Path

Approved
PAYNE, JIMMY
Project Approvers
02/17/11 - 11:01 AM

Line 2: Approved
Sch 40 T6061 T6 pipe

Req Approval Workflow Path

Approved
PAYNE, JIMMY
Project Approvers
02/17/11 - 11:01 AM

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

| Step | Action |
|------|---|
| 19. | Click the Home link. Home |
| 20. | Congratulations! You have completed this topic. |