



Purchasing Activities

Creating a Change Request to Update Budget Information

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 realized while reviewing your requisition in workflow that you have used the incorrect budget. Once the PO has been Dispatched it will let you make changes here but will not update them on the Purchase Order. The paper form must be used to update budget information once the PO has been created.

Scenario:

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

Key Information:

Requisition Number
Information to be updated



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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.



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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:

Requisition 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	<Select Action> 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	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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Requisition ID: Request Status: All but Complete Budget Status:

Date From: Date To: 02/13/2011

Requester: SSEMINOLE Entered By: MFELDMAN PO ID:



Search Clear

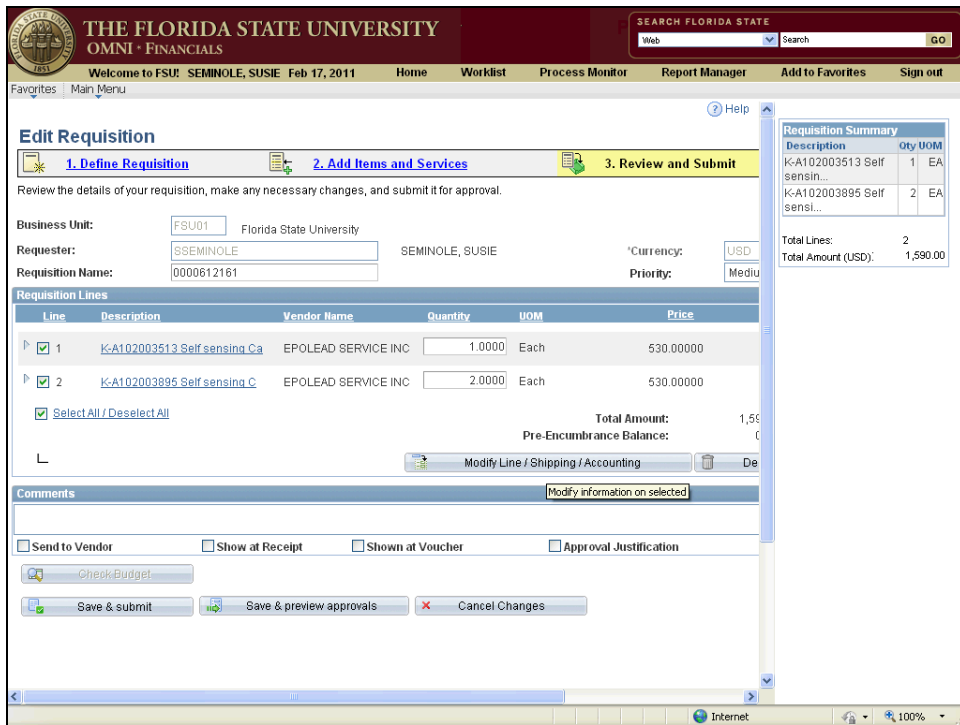
Requisitions

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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
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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. 
8.	Select the check boxes to the left of the lines where you need to update the budget or choose select all.



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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: 0000612161 Priority: Medium

Line	Description	Vendor Name	Quantity	UOM	Price
1	K-A102003513 Self_sensing_Ca	EPOLoad SERVICE INC	1.0000	Each	530.00000
2	K-A102003895 Self_sensing_C	EPOLoad SERVICE INC	2.0000	Each	530.00000

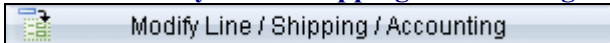
Total Amount: 1,590.00
Pre-Encumbrance Balance: 0.00

Modify Line / Shipping / Accounting

Comments: Modify information on selected

Send to Vendor Show at Receipt Shown at Voucher Approval Justification

Check Budget Save & submit Save & preview approvals Cancel Changes

Step	Action
9.	Click the Modify Line / Shipping / Accounting button. 



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Favorites Main Menu Help

Create Requisition

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: Category:

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"/>	FSU01	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

[Load Values From Defaults](#)

Apply Cancel

Requisition Summary

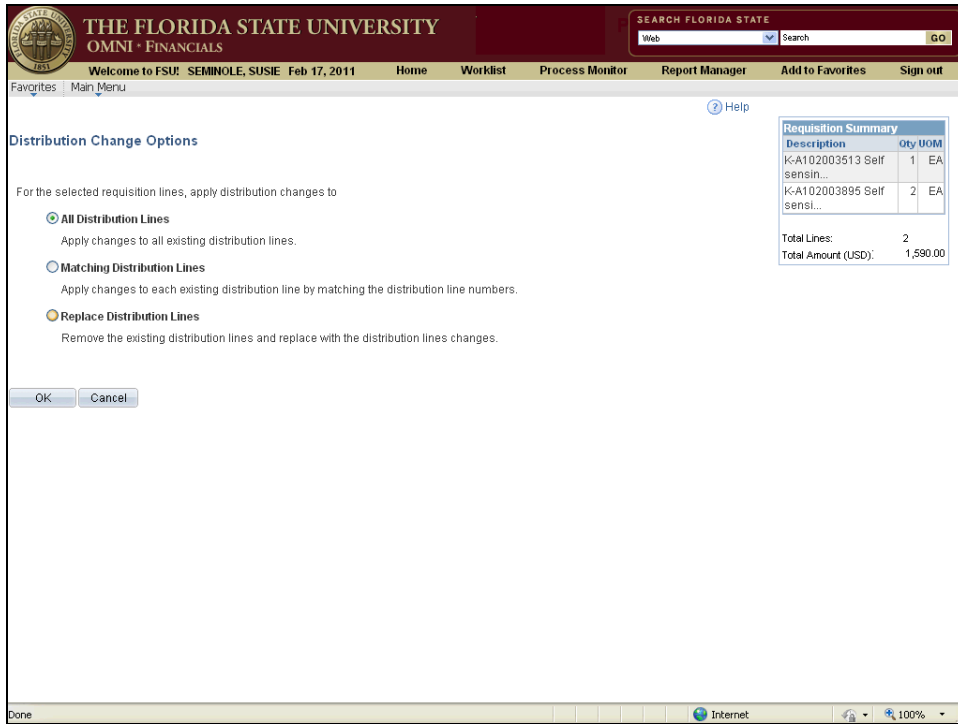
Description	Qty	UOM
K:A102003513 Self sensin...	1	EA
K:A102003895 Self sensl...	2	EA
Total Lines:	2	
Total Amount (USD):	1,590.00	




Step	Action
10.	Click the Load Values From Defaults link. NOTE: Requisitions must not have been processed into a PO to allow changes. Load Values From Defaults
11.	Update Department as needed. For the purpose of this example, enter " 074000 " into the Dept field.
12.	Update the Fund as needed. For the purpose of this example, enter " 110 " into the Fund field.
13.	Click the Apply button.



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Step	Action Options
14.	<p>Click the Replace Distribution Lines option.</p> <p>NOTE: Select this option if you are changing from a project to a non -project or updating an entire budget line</p> <p>You must have loaded defaults prior to this selection.</p> <p>This option will replace all distribution line values that you checked exactly as they are on your default screen.</p> <p></p>
15.	<p>Click the All Distribution Lines option. (Select this option for most updates.)</p> <p>This option will apply only the changes <i>just made</i> on your default screen to all distribution line values that you checked. It will leave existing values as is.</p> <p>Select this option for changing a few chartfields or a vendor/category.</p> <p>Matching distribution is used for PO's with split distribution lines or split schedules.</p> <p></p>
16.	<p>Click the OK button.</p> <p></p>



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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: 0000612161 Priority: Medium

Line	Description	Vendor Name	Quantity	UOM	Price
1	K:A102003513 Self_sensing_Ca	EPOLEAD SERVICE INC	1.0000	Each	530.00000
2	K:A102003895 Self_sensing_C	EPOLEAD SERVICE INC	2.0000	Each	530.00000

Total Amount: 1,590.00
Pre-Encumbrance Balance: 0.00




Expand Section / Deselect All

Comments

Send to Vendor Show at Receipt Shown at Voucher Approval Justification

Check Budget


Save & submit Save & preview approvals Cancel Changes

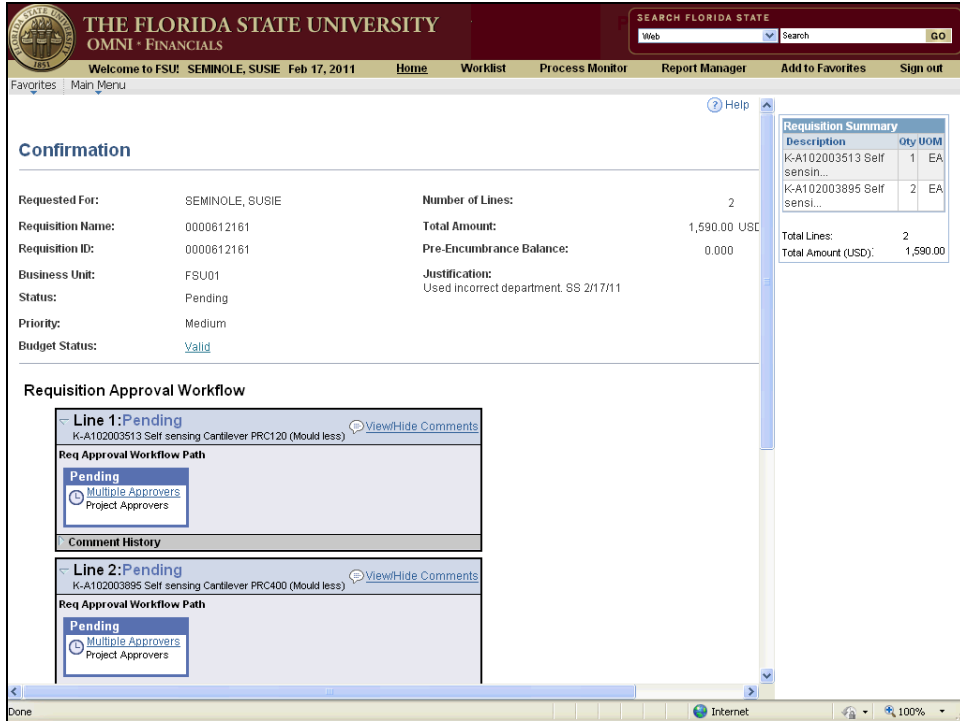
Step	Action
17.	Click the Expand Section button. 
18.	Click the Chartfields2 tab to view your budget information. 
19.	<p>Enter an explanation of the change into the Comments field to include reason for change, date of change request, your initials or name and if this change should be dispatched to the vendor.</p> <p>For the purpose of this example, enter "Used incorrect department. 2/17/11, SS" into the Comments field.</p> <p>These Comments should not be sent to the vendor. Do <u>not</u> check the "Send to Vendor" checkbox. Budgets are internal changes only.</p> <p>Once a PO is created budget changes must be made using the Change Request form (http://purchasing.fsu.edu/content/download/43463/299357) (http://purchasing.fsu.edu/DEPARTMENTAL-INFORMATION/Forms) located on the Purchasing website.</p> <p>If receipts/payments have already been made against a line, you must specify the remaining quantity to move to a different budget.</p>
20.	To send your change request comments to buyers and/or approver, click the Approval Justification option. 



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Step	Action
21.	Click the Save & submit button. 



Confirmation

Requested For: SEMINOLE, SUSIE Number of Lines: 2

Requisition Name: 0000612161 Total Amount: 1,590.00 USD

Requisition ID: 0000612161 Pre-Encumbrance Balance: 0.000

Business Unit: FSU01 Justification: Used incorrect department. SS 2/17/11

Status: Pending

Priority: Medium

Budget Status: [Valid](#)

Requisition Approval Workflow

Line 1: Pending
K-A102003513 Self sensing Cantilever PRC120 (Mould less)

Req Approval Workflow Path

Pending
Multiple Approvers
Project Approvers


Comment History

Line 2: Pending
K-A102003895 Self sensing Cantilever PRC400 (Mould less)

Req Approval Workflow Path

Pending
Multiple Approvers
Project Approvers

Description	Qty	UOM
K-A102003513 Self sensin.	1	EA
K-A102003895 Self sensin...	2	EA
Total Lines:	2	
Total Amount (USD):	1,590.00	

Step	Action
22.	Click the Home link. 
23.	Congratulations! You have completed this topic. End of Procedure.