



OMNI Auxiliary AR/Billing: College of Medicine

Medicine Stockroom & Medicine Labs

Placing an Order

All new orders are placed with the appropriate Stockroom or Lab manager using the auxiliary’s approved form. For more information, please visit the [College of Medicine’s Division of Research webpage](#). Please be aware that a Purchase Order serves to encumber funds and enable internal charges. **A Purchase Order does not serve to place an order with this or any selling auxiliary.**

Creating a Requisition

This requisition is very much like other blanket purchase orders departments are accustomed to. Review the below step-by-step guide to ensure the appropriate vendor and categories are selected.

1. Determine your requisition amount as described separately on the [Controller’s Office Auxiliary Accounting training materials page](#). Your department’s Budget Account Manager may have already performed this task for you.
2. First, decide which vendor and category code(s) you will use. The College of Medicine has several vendors and category codes to accommodate the variety of purchases that departments make from this selling auxiliary area. They are listed here:

Supplier ID	Supplier Name	Category Code	Category Code Description
AUX0000011	College of Medicine Stockroom	AUX_MED0000001	College of Medicine lab supplies, not including gas and chemicals
AUX0000011	College of Medicine Stockroom	AUX_MED0000002	College of Medicine lab supplies - gas and chemicals
AUX0000012	College of Medicine Labs	AUX_MED0000003	College of Medicine departmental charges for scientific research and analysis (Translational Lab & Core Labs)

3. Navigate to page: <https://my.fsu.edu> > “FI” > Main Menu > eProcurement > Requisitions as shown below:





- You will land on the **Requisition Settings** page. Click the magnifying glass to the right of the “Supplier” field to look up your supplier.

The screenshot shows the 'Requisition Settings' page. At the top, there are navigation tabs: Favorites, Main Menu, eProcurement, and Requisition. The main content area is divided into several sections:

- Business Unit:** FSU01 (with a magnifying glass icon), Florida State University
- *Requester:** HFORLONG (with a magnifying glass icon), Heather Forlong
- *Currency:** USD
- Requisition Name:** (empty field)
- Priority:** Medium (dropdown menu)

Line Defaults section:

- Supplier:** (empty field with a magnifying glass icon circled in red)
- Supplier Location:** (empty field with a magnifying glass icon)
- Category:** (empty field with a magnifying glass icon)
- Unit of Measure:** (empty field with a magnifying glass icon)

Shipping Defaults section:

- Ship To:** SWJB1032 (with a magnifying glass icon)
- Due Date:** (empty field with a calendar icon)
- Attention:** (empty field)

Accounting Defaults section:

- Buttons: Personalize, Find, First, 1 of 1, Last
- Chartfields: Details, Asset Information
- Table with columns: Percent, Location, GL Unit, Dept, Fund, PC Bus Unit, Project, Activity, Sou
- Row 1 values: (empty), SWJB1032 (with magnifying glass), FSU01 (with magnifying glass), (empty), (empty), (empty), (empty), (empty), (empty)

At the bottom, there are three buttons: OK, Cancel, and Refresh.

- Search for your supplier. All internal suppliers will begin with “AUX.” Type “AUX” in the Supplier ID field and select “Find.” The search results will show a list of internal suppliers. Select the appropriate supplier.
 - You must enter a supplier that begins with AUX. For this requisition, the appropriate supplier is one of the below:

Supplier ID	Supplier Name
AUX000011	College of Medicine Stockroom
AUX000012	College of Medicine Labs



Supplier Search

Supplier ID

Name

Short Supplier Name

Alternate Supp Name

City

Country State

Postal Code

5	AUX0000008	Warehouse	001	Main	Florida State University	Tallahassee	FL	
6	AUX0000009	FSU Information Technology Service	001	MAIN	296 Champions Way	Tallahassee	FL	
7	AUX0000010	College of Music Performance Halls	MAIN		PO Box 3061180	Tallahassee	FL	
8	AUX0000011	College of Medicine Stockroom	MAIN		1115 W. Call St	Tallahassee	FL	
9	AUX0000012	College of Medicine Labs	001	Main	1115 W. Call St.	Tallahassee	FL	
10	AUX0000013	Chemistry Stockroom	001	Main	118 Dittmer Building	Tallahassee	FL	
11	AUX0000014	Chemistry Labs	001	Main	118 Dittmer Building	Tallahassee	FL	
12	AUX0000015	Biology Stockroom	001	Main	319 Stadium Dr	Tallahassee	FL	



- 6. The system will bring you back to the **Requisition Settings** page with the supplier information included.

Requisition Settings

Business Unit: FSU01 Florida State University Requisition Name:

*Requester: RBERG Robert Berg Priority: Medium

*Currency: USD

Line Defaults

Supplier: AUX0000012 Category:

Supplier Location: 001 Unit of Measure: ea

Shipping Defaults

Ship To: SFAB220 Add One Time Address

Due Date: 6/30/2018 Attention:

Accounting Defaults Personalize | Find | First 1 of 1 Last

Percent	Location	GL Unit	Dept	Fund	PC Bus Unit	Project	Activity	Sou
	SFAB220	FSU01	196000					

- 7. Choose a Unit of Measure. **For internal requisitions, always choose "EA."**

Requisition Settings

Business Unit: FSU01 Florida State University Requisition Name:

*Requester: RBERG Robert Berg Priority: Medium

*Currency: USD

Line Defaults

Supplier: AUX0000012 Category:

Supplier Location: 001 Unit of Measure: ea

Shipping Defaults

Ship To: SFAB220 Add One Time Address

Due Date: 6/30/2018 Attention:

Accounting Defaults Personalize | Find | First 1 of 1 Last

Percent	Location	GL Unit	Dept	Fund	PC Bus Unit	Project	Activity	Sou
	SFAB220	FSU01	196000					

- 8. Enter a due date. **For year-long, open ended PO's, use 6/30 of the appropriate fiscal year. You should use the project end date if the project ends before the end of this fiscal year.**



Shipping Defaults

Ship To SFAB220

Due Date 06/30/2018

Add One Time Address

Attention

Accounting Defaults

Personalize | Find | | First 1 of 1 Last

Chartfields1 | Details | Asset Information |

Percent	Location	GL Unit	Dept	Fund	PC Bus Unit	Project	Activity	Sou
<input type="text"/>	SFAB220 <input type="text"/>	F5U01 <input type="text"/>	196000 <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

OK Cancel Refresh

9. If you receive the following warning message after entering the date, click "OK".

Message

Warning -- date out of range. (15,9)

The date entered is either more than 30 days in the past or 30 days in the future. This is not normally true for this date. Either acknowledge that the date is OK, or correct the entered date.

OK

10. When finished, select "OK" at the bottom of the screen.

11. You will be returned to the **Create Requisition** Page. Select "Special Requests" to begin adding the individual lines for your requisition (if you are directed to the Requisition Settings page again after selecting Special Requests, click "OK" to proceed).

Favorites ▾ | Main Menu ▾ > eProcurement ▾ > Requisition

Create Requisition ?

Welcome Heather Forlong |

Request Options ▾

Enter search criteria or select from the menu on the right to begin creating your requisition.

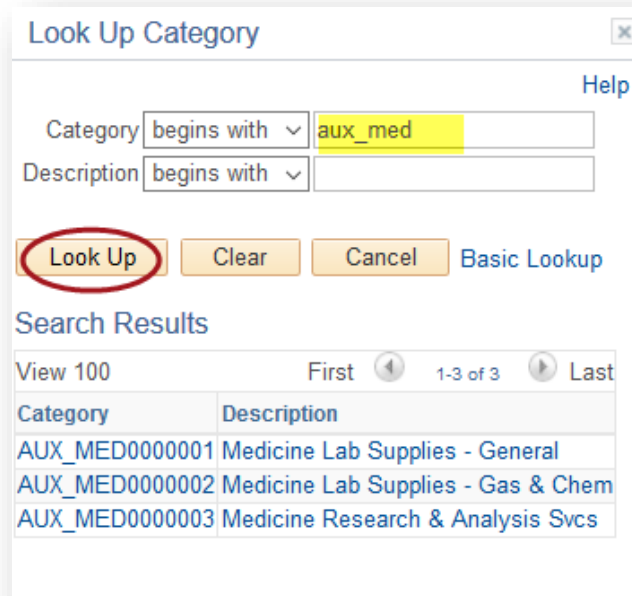
- Web**
Browse Supplier Websites
SpearMart PunchOut
- Special Requests**
Create a non-catalog request
- ePro Services**
Request Services
Fixed Cost Service
Variable Cost Service
Time and Materials



12. Create line(s) for your services as appropriate.

- b. Enter the item description as desired.
- c. Enter Price & Quantity:
 - i. Price: equal to the amount you plan to spend for the PO duration
 - ii. Quantity: 1 – **Note: quantity should always equal 1**
- d. **Search for your Category Code(s).** Type “AUX_MED” into the Category field, and then select the magnifying glass to search for this auxiliary’ category codes. It is very important that you select the appropriate internal category code.
 - i. For this requisition, choose from the following Category Codes as shown below based upon the vendor you entered above.

Category Code	Category Code Description	Use only with this Supplier	Supplier Name
AUX_MED0000001	College of Medicine lab supplies, not including gas and chemicals	AUX0000011	College of Medicine Stockroom
AUX_MED0000002	College of Medicine lab supplies - gas and chemicals	AUX0000011	College of Medicine Stockroom
AUX_MED0000003	College of Medicine departmental charges for scientific research and analysis (Translational Lab & Core Labs)	AUX0000012	College of Medicine Labs



- e. Add notes as needed in the “Additional Information” field. This information is for your research purposes only.



Special Requests ?

Enter information about the non-catalog item you would like to order:

Item Details

*Item Description	Supplies not gas/chem	Currency	USD
*Price	250	*Unit of Measure	EA
*Quantity	1	Due Date	06/30/2018
*Category	AUX_MED0000001		

Supplier

Supplier ID: AUX0000012

Supplier Name: College of Medicine Labs

[Suggest New Supplier](#)

Additional Information

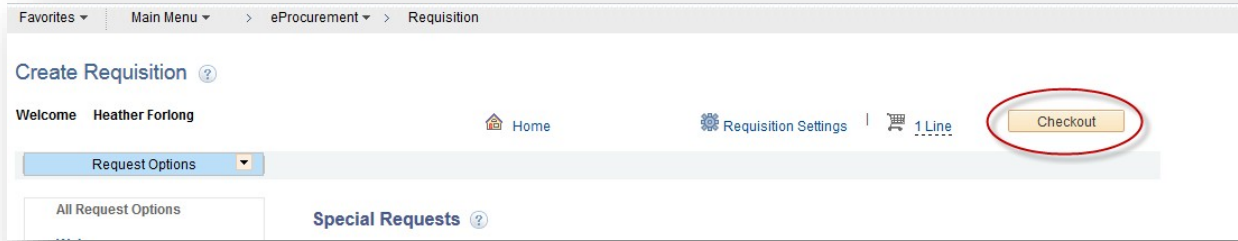
Send to Supplier Show at Receipt Show at Voucher

13. When ready, select “Add to Cart” at the bottom of the page.



14. You will see a screen for a new, blank line. Create additional lines as needed for other category codes for this auxiliary. Please group all activity per category code onto one line versus spreading it out over multiple lines when the category code is the same unless you are adding multiple budget combos in the same category code. *Note: projects must be on their own requisitions.*

15. When lines for all applicable goods/services have been added and you are ready to check out, select “Checkout” at the top of the page:



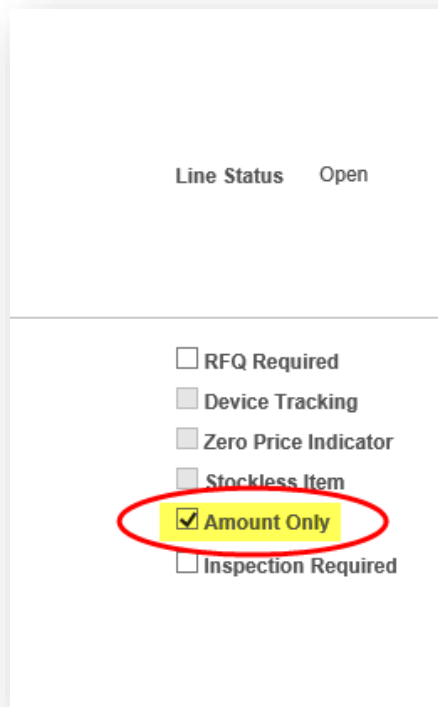
16. You will be returned to the **Checkout – Review and Submit** page.

17. Flag all of the requisition lines as “Amount Only” as shown below. **This is important: without this step, your PO encumbrance will not be correct after your PO is expended.**

f. Select the icon under the “Details” column for the line:

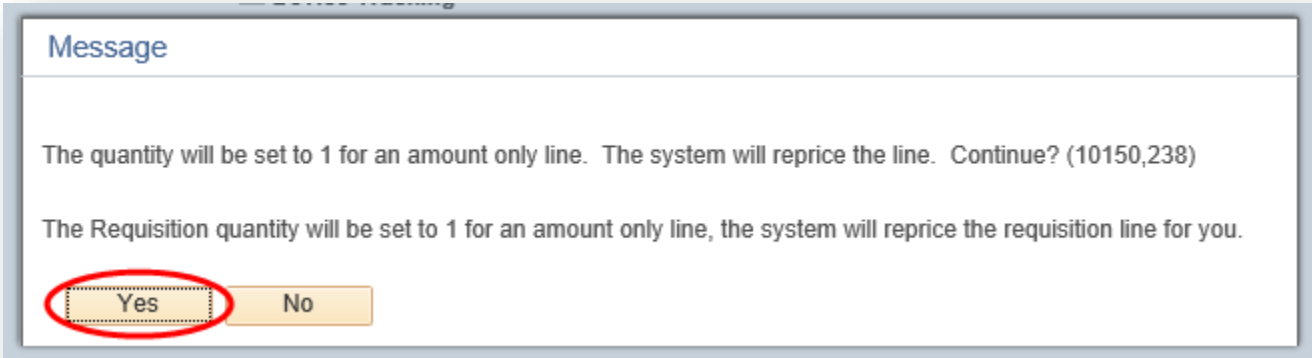
Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	Supplies not gas/chem		College of Medicine Labs	1.0000	Each	250.0000	250.00		Add	

g. On the “Line Details” page, select the checkbox for “Amount Only”.



h. Scroll to the bottom of the page and select “OK”.

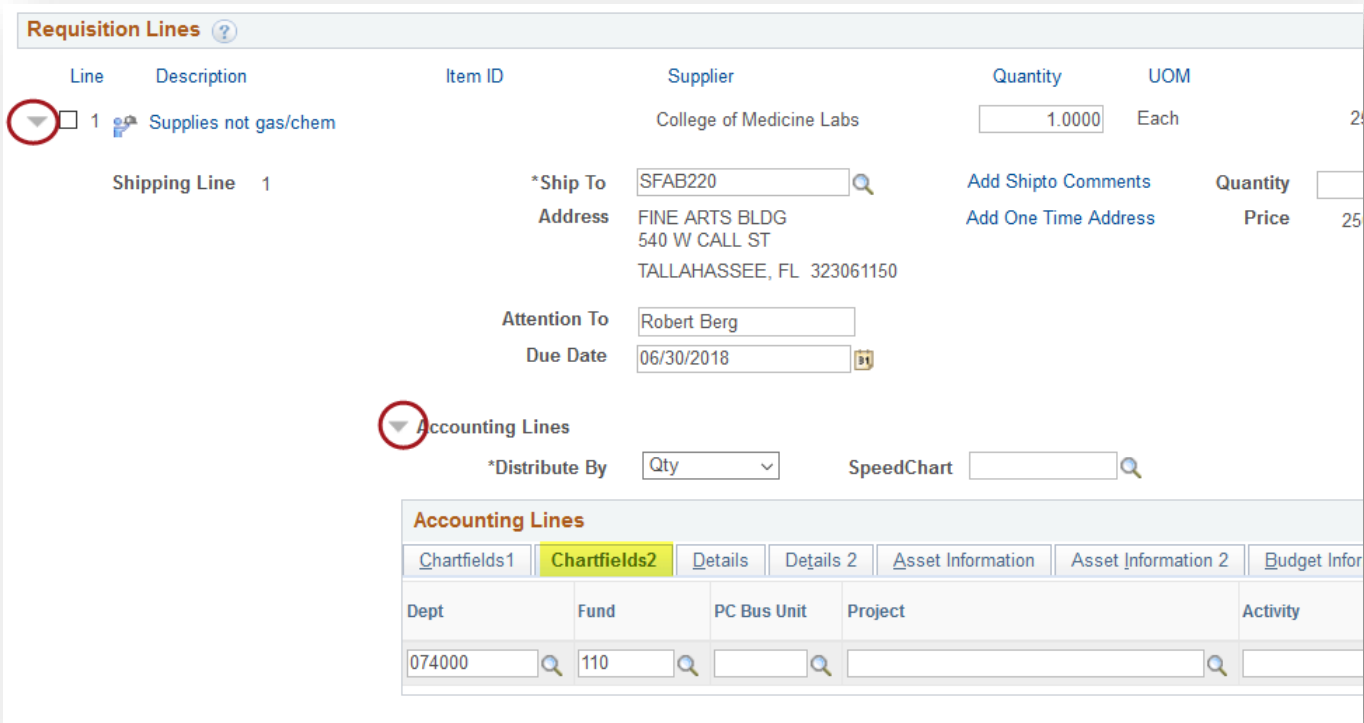
i. A message will pop up indicating that your quantity will be set to 1; this is ok. Select “Yes”.



j. Repeat steps a – d for all lines.

18. Enter your accounting information (department ID, fund, project) as shown below:

k. Expand the lines using the small grey arrows and then select the “Chartfields 2” tab:



l. Enter the appropriate department ID, fund and project combination in the Chartfields 2 tab.

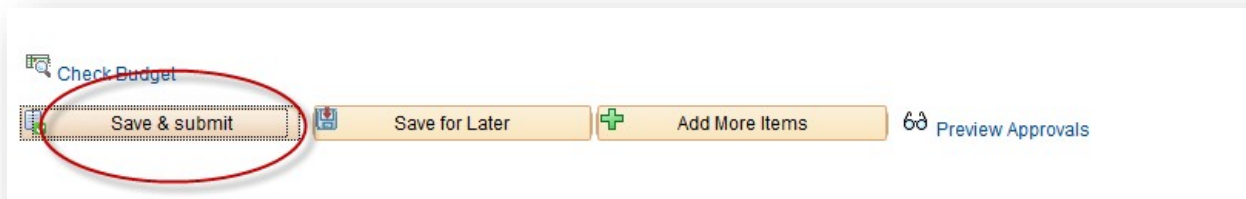
i. **NOTE: A project must be on its own requisition. A requisition can not include multiple projects or a project and multiple non-project funds.**

ii. A requisition can include multiple non-project combinations (including optional chartfields).

m. Repeat steps 18) a and 18) b for all lines.



19. When reviewed and ready to submit for approval, click **Save and Submit** at the bottom of the page:



20. The standard approval workflow will be initiated. Once the requisition is fully approved, it will become a purchase order and will be dispatched to the vendor when the applicable system processes run throughout the day.