OMNI - Auxiliary AR / Billing - FSU Card

Placing an Order

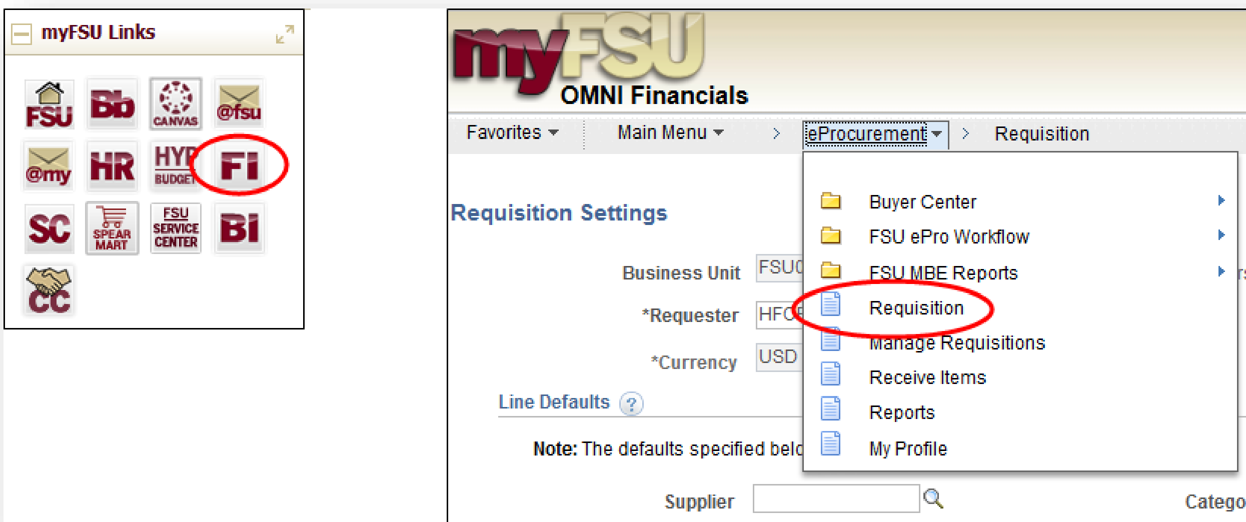
To place a **departmental order** with the FSU Card Center, utilize the information found on the FSU Card Services website. All orders will require PO and line Information in order to be processed.

Creating a Requisition

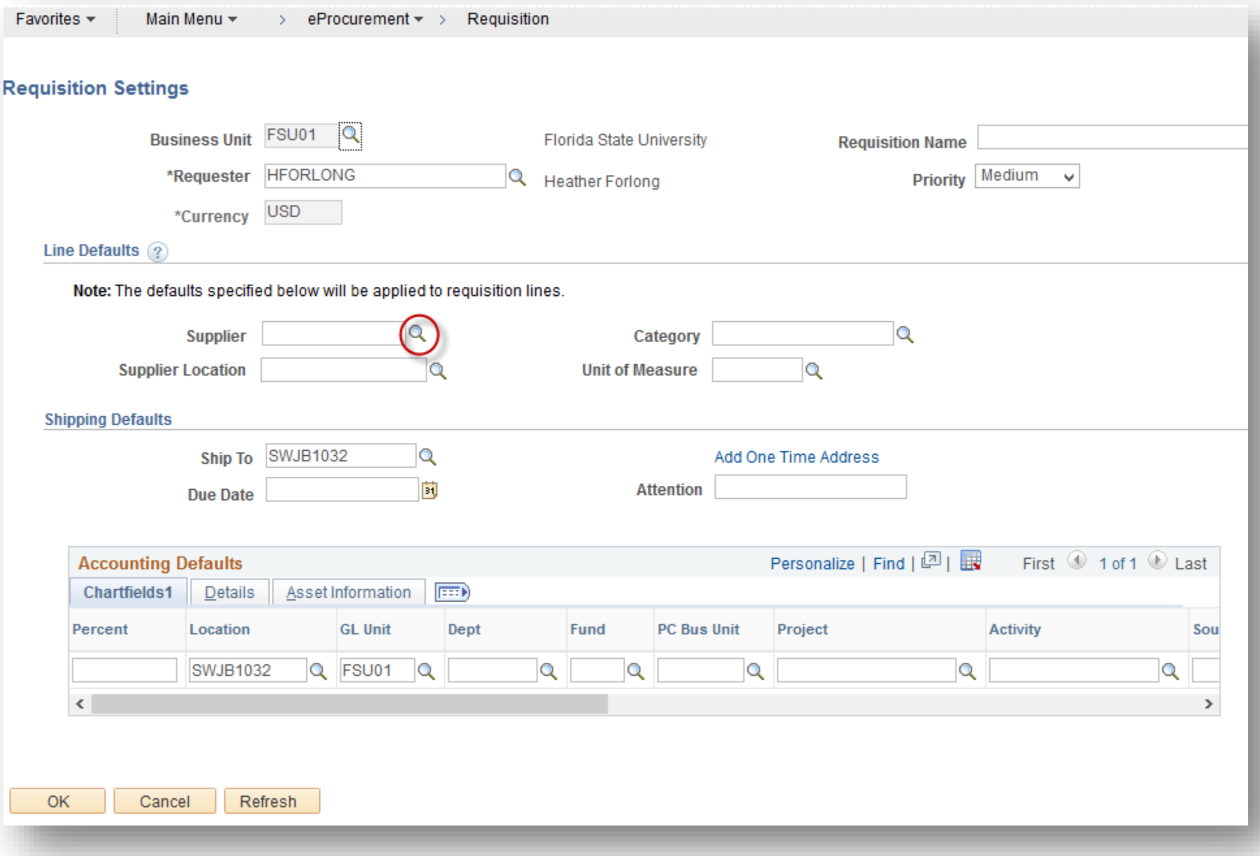
This requisition is very much like other internal auxiliary open-ended purchase orders departments are accustomed to. Review the below step-by-step guide to ensure the appropriate vendor and categories are selected.

1. Determine your requisition amount as described separately. Your department's Budget Account Manager may have already performed this task for you.

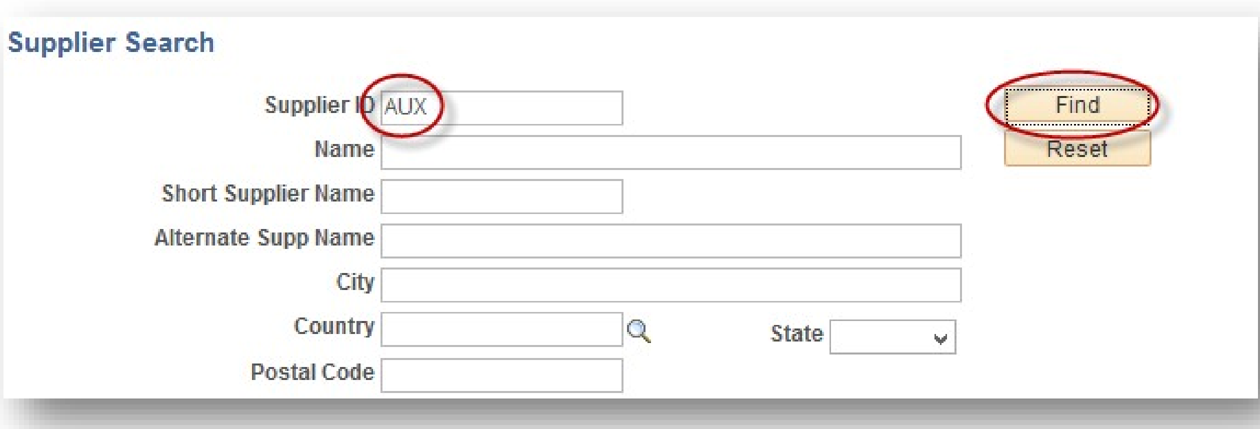
2. Navigate to page: https://my.fsu.edu > *"FI" > Main Menu > eProcurement > Requisitions* as shown below.

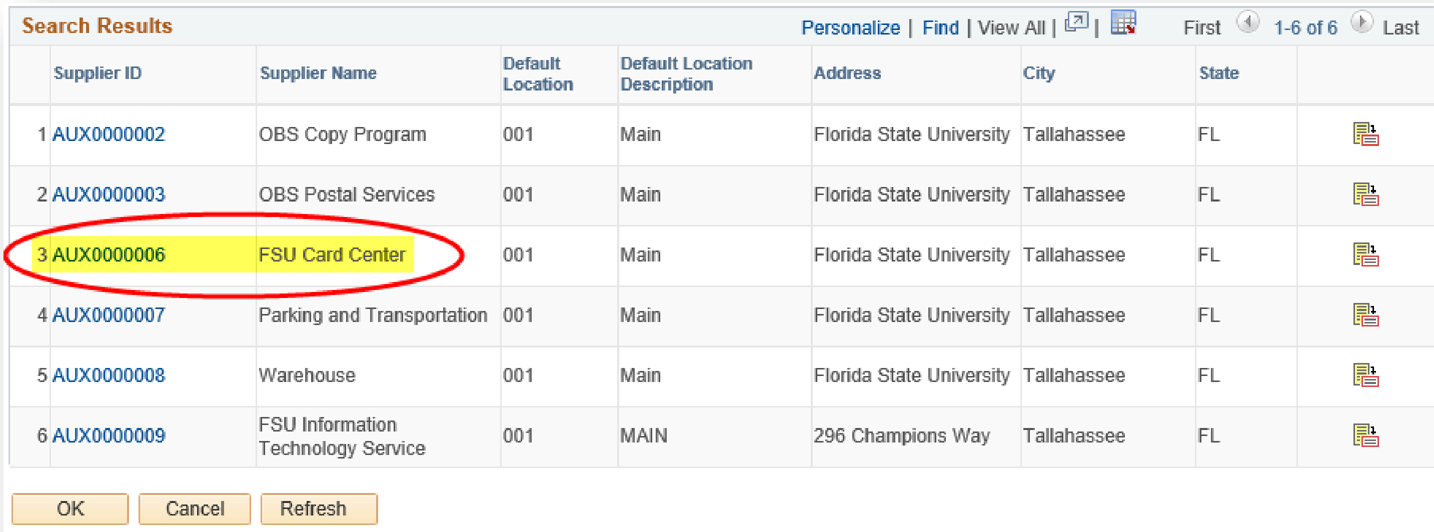


3. You will land on the Requisition Settings page. Click the magnifying glass to the right of the "Supplier" field to look up your supplier.

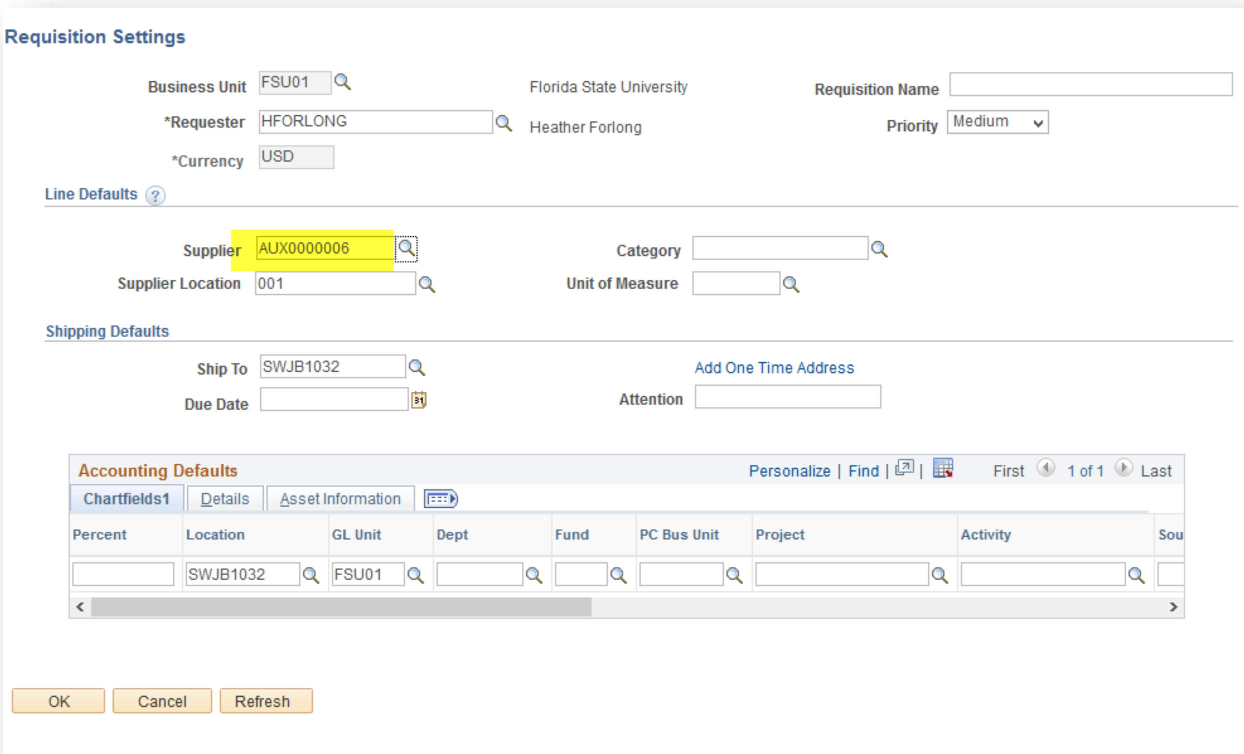


4. Search for your supplier. All internal suppliers will begin with "AUX." Type "AUX" in the Supplier ID field and select "Find." The search results will show a list of internal suppliers. Select the appropriate supplier.
    a. You must enter a supplier that begins with AUX. For this requisition, the appropriate supplier is:
        i. AUX0000006 FSU Card Center

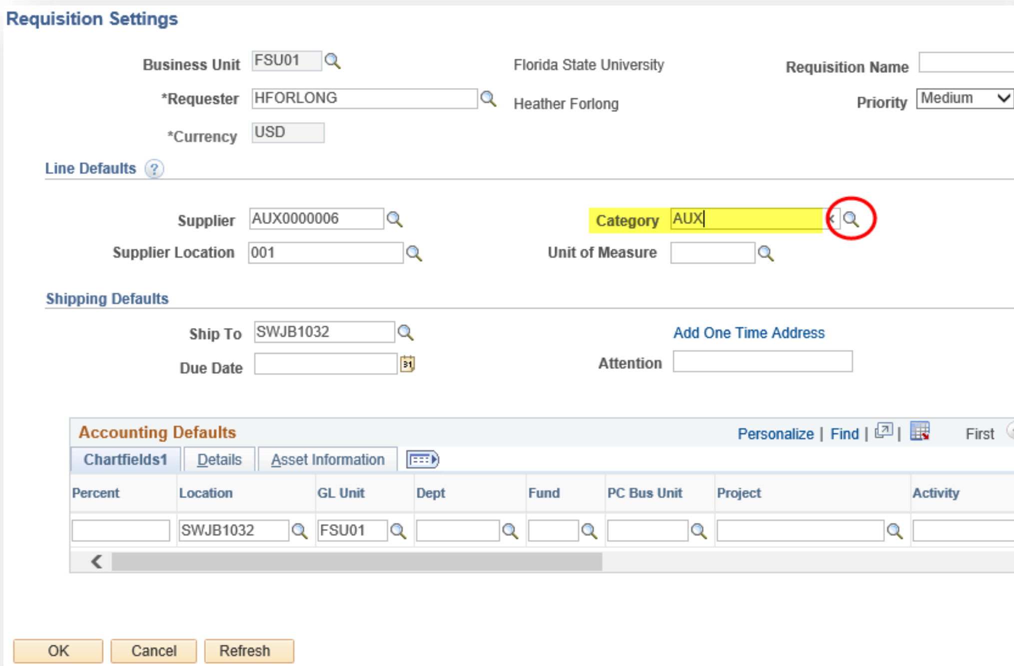


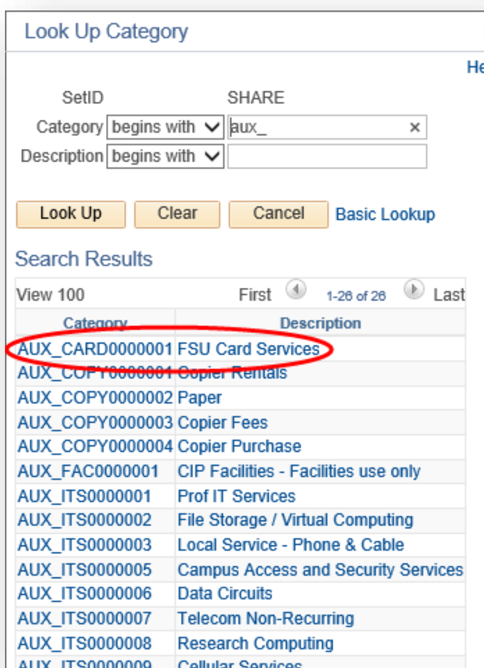


5. The system will bring you back to the **Requisition Settings** page with the supplier information included.

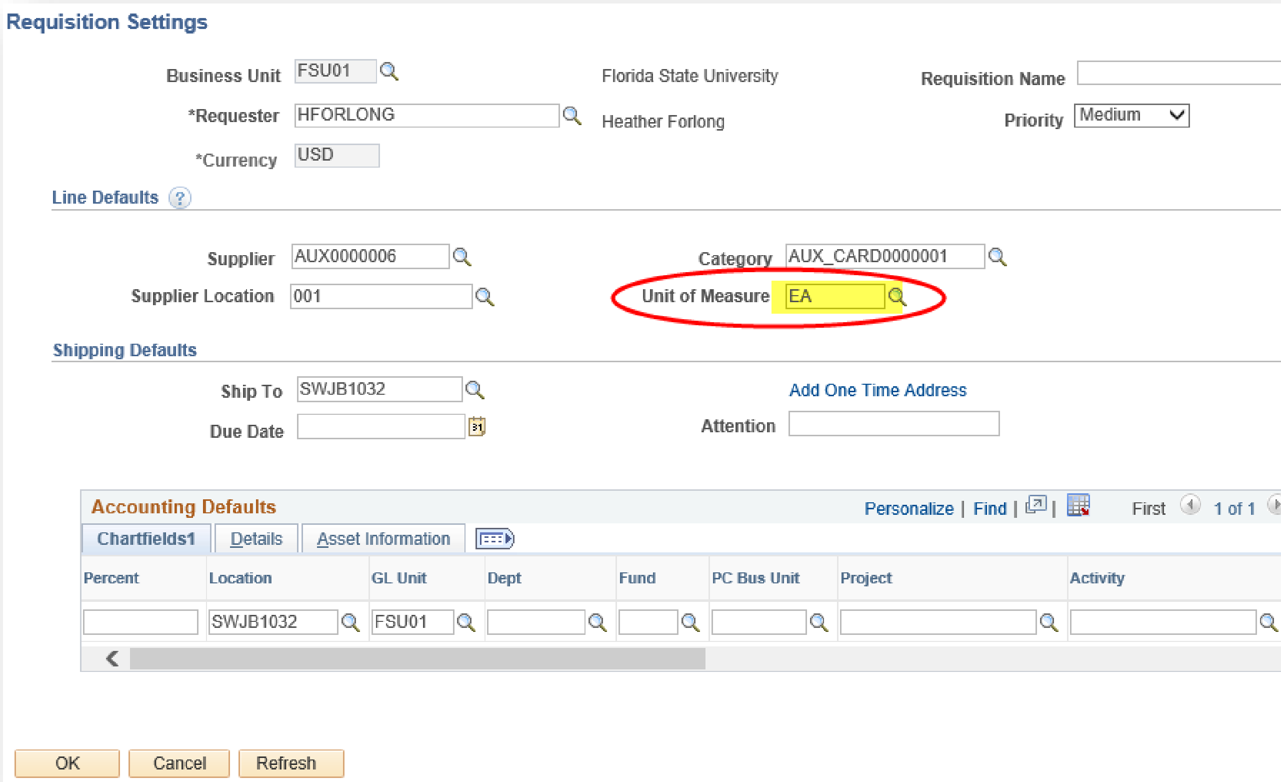


6. Search for your Category Code(s). Select the magnifying glass next to the “Category” field. It is very important that you select the appropriate internal category code. All internal category codes are prefixed with “AUX.” Type “AUX” into the Category field, and select the appropriate code.
    a. For this line of business, **ALWAYS** select Category Code **AUX_CARD0000001:**

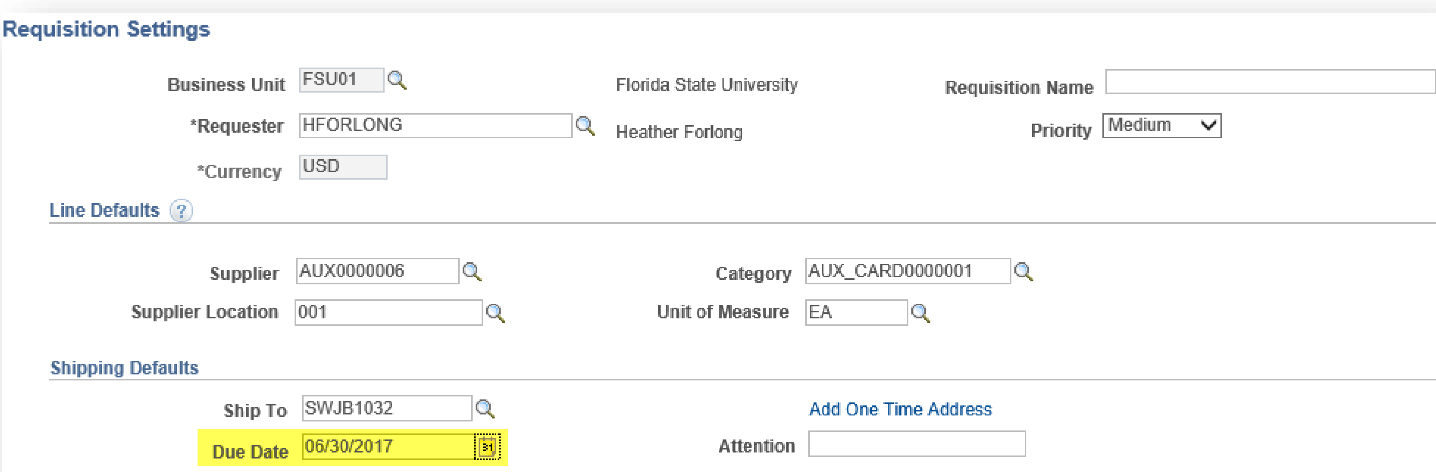




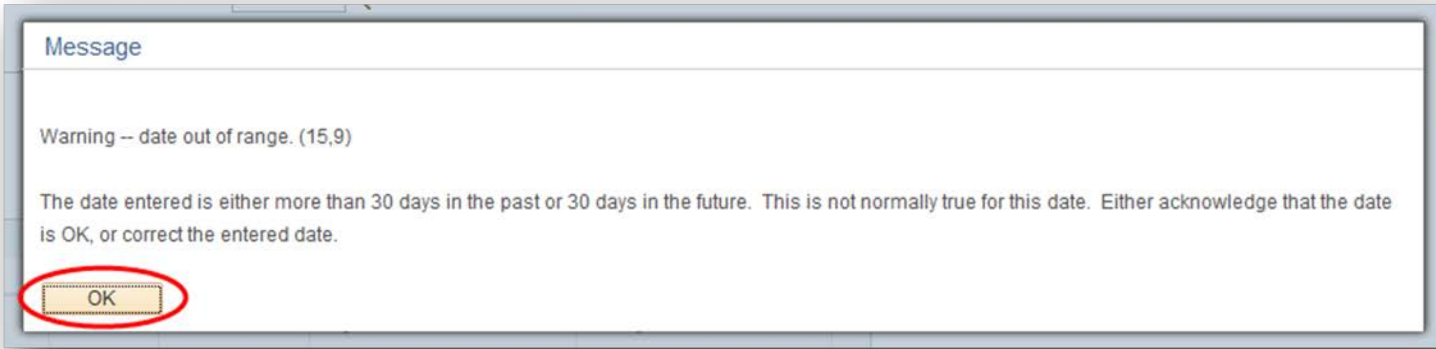
7. Choose a Unit of Measure. **For internal requisitions, always choose "EA."**



8. Enter a due date. **For year-long, open ended PO's such as what would be typical for this line of business, use 6/30 of the appropriate fiscal year.**

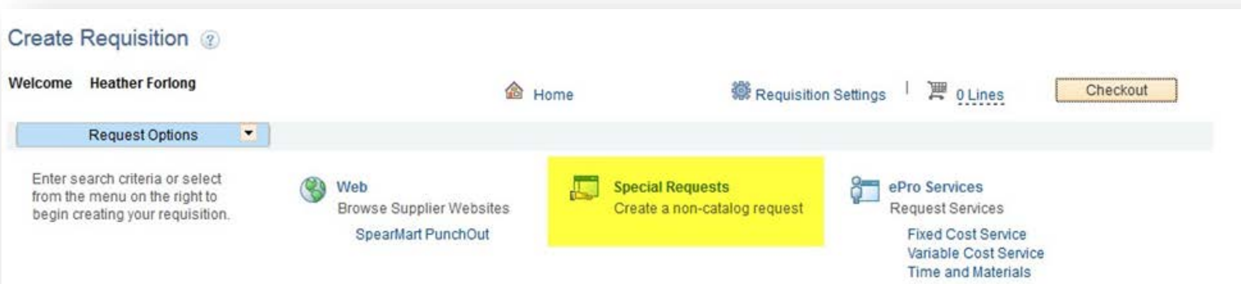


9. If you receive the following warning message after entering the date, click "OK":

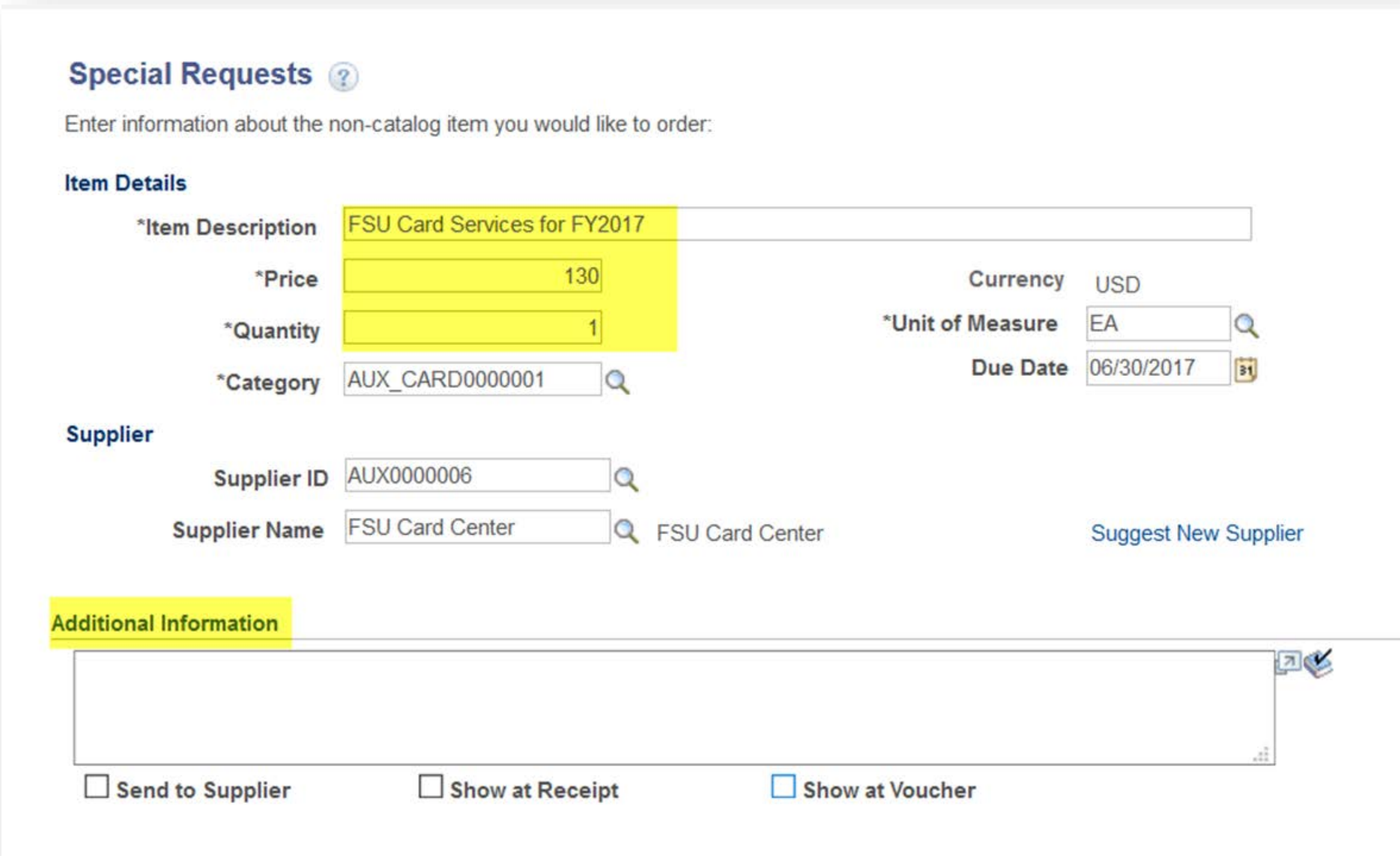


10. When finished, select "OK" at the bottom of the page.

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).



12. Create the line(s) for your service:
    a. Enter the item description.
    b. 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**
        iii. Add notes as needed in the "Additional Information" field. This information is for your research purposes only.

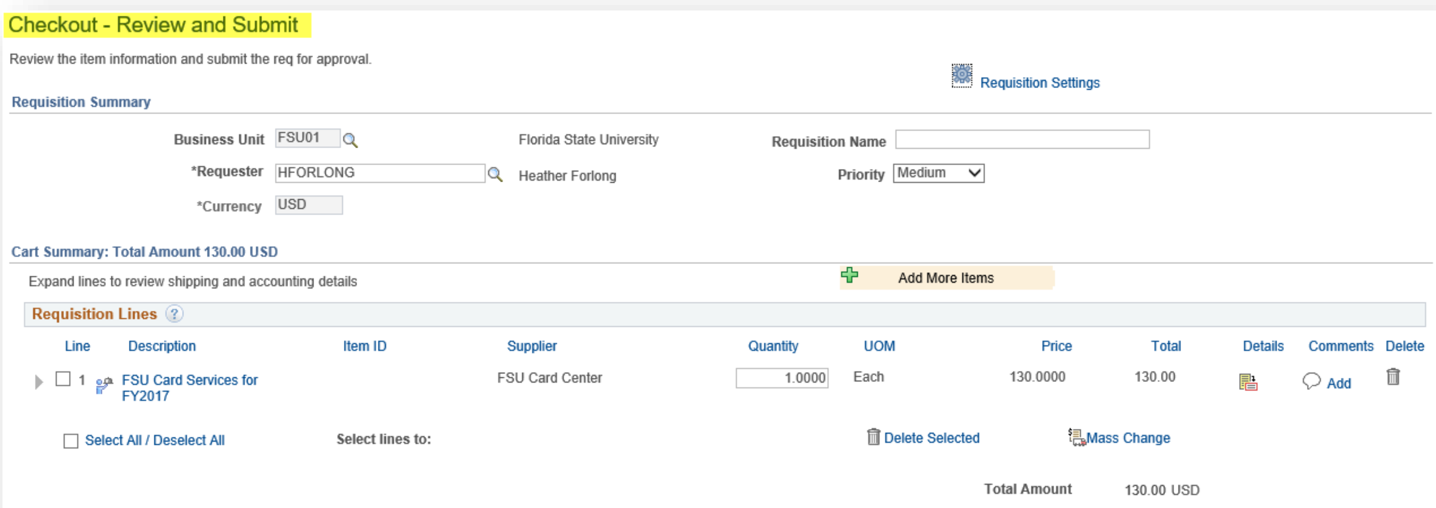


13. When ready, select "Add to Cart" at the bottom of the page.

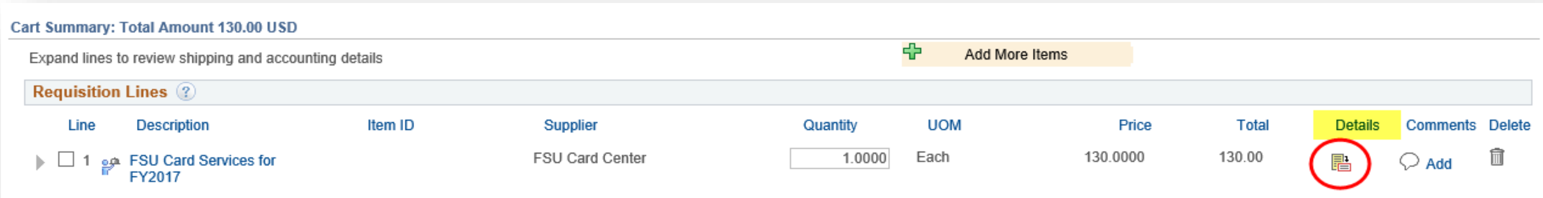
14. You will see a new, blank line. Create additional lines as needed. For example, you might want to add a different fund or expense chartfield.

15. When you are ready to check out, select "Checkout" at the top of the page:

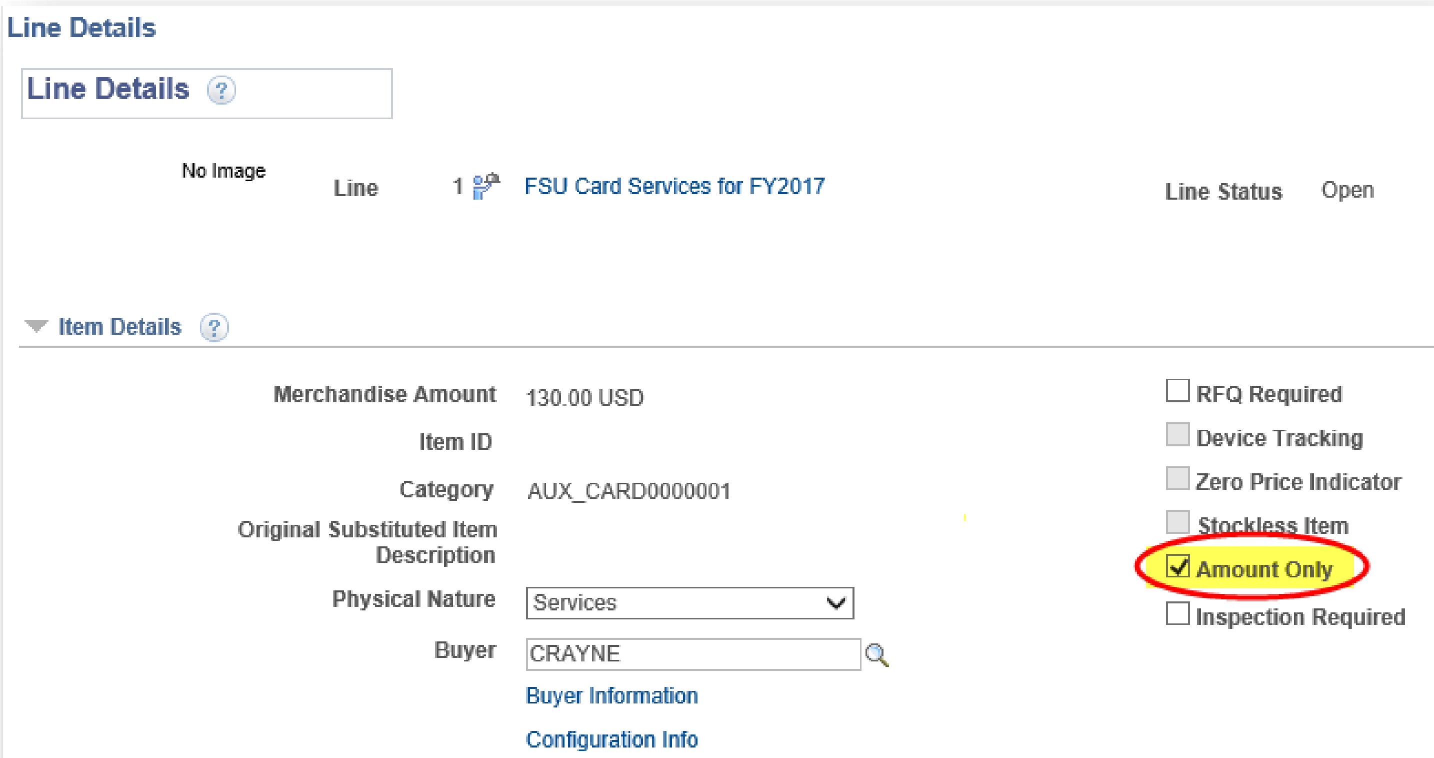
16. You will be returned to the **Checkout – Review and Submit** page.



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.**
    a. Select the icon in the “Details” column for the line:

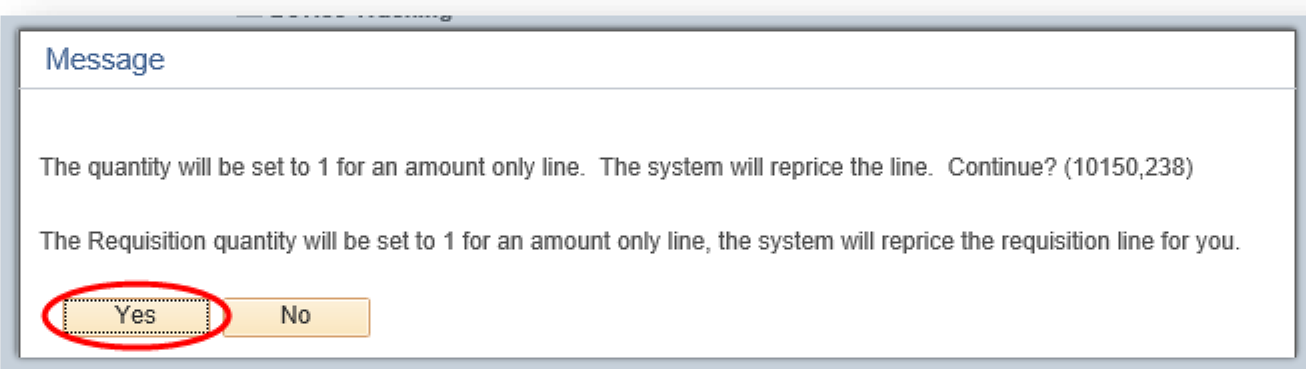


    b. On the “Line Details” page, select the checkbox for “Amount Only.”



c. Scroll to the bottom of the page and select "OK."

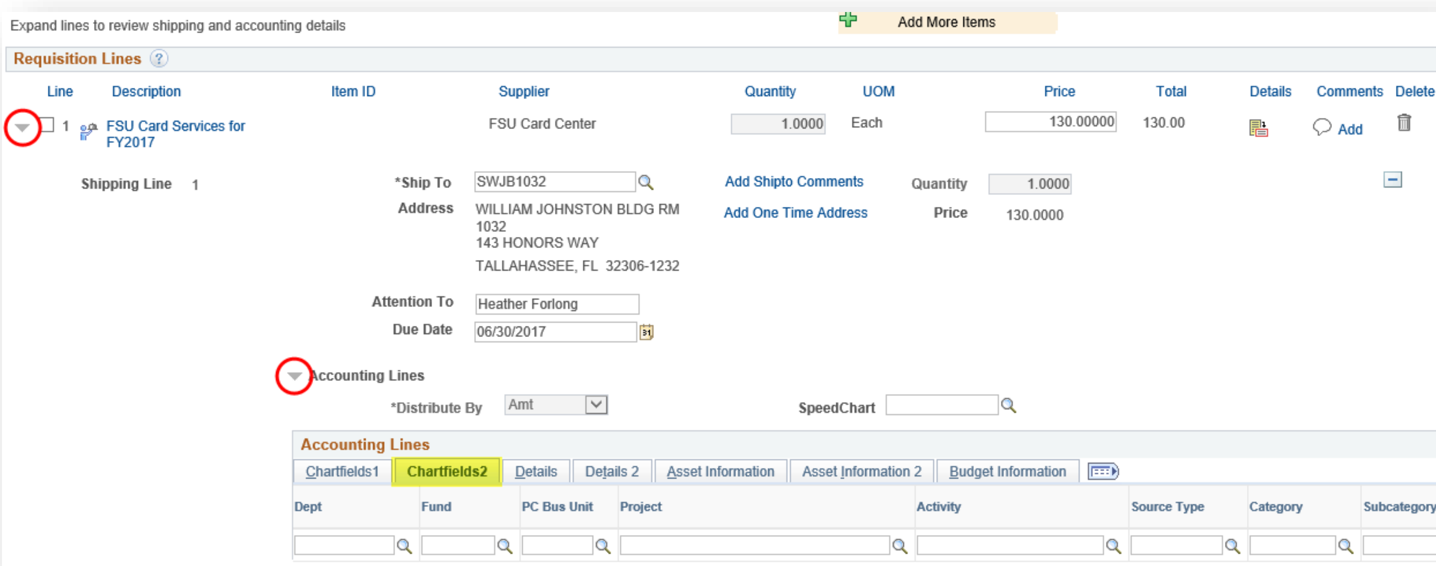
d. A message will pop up indicating that your quantity will be set to 1; this is ok. Select "Yes."



e. **Repeat steps a – d for all lines.**

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

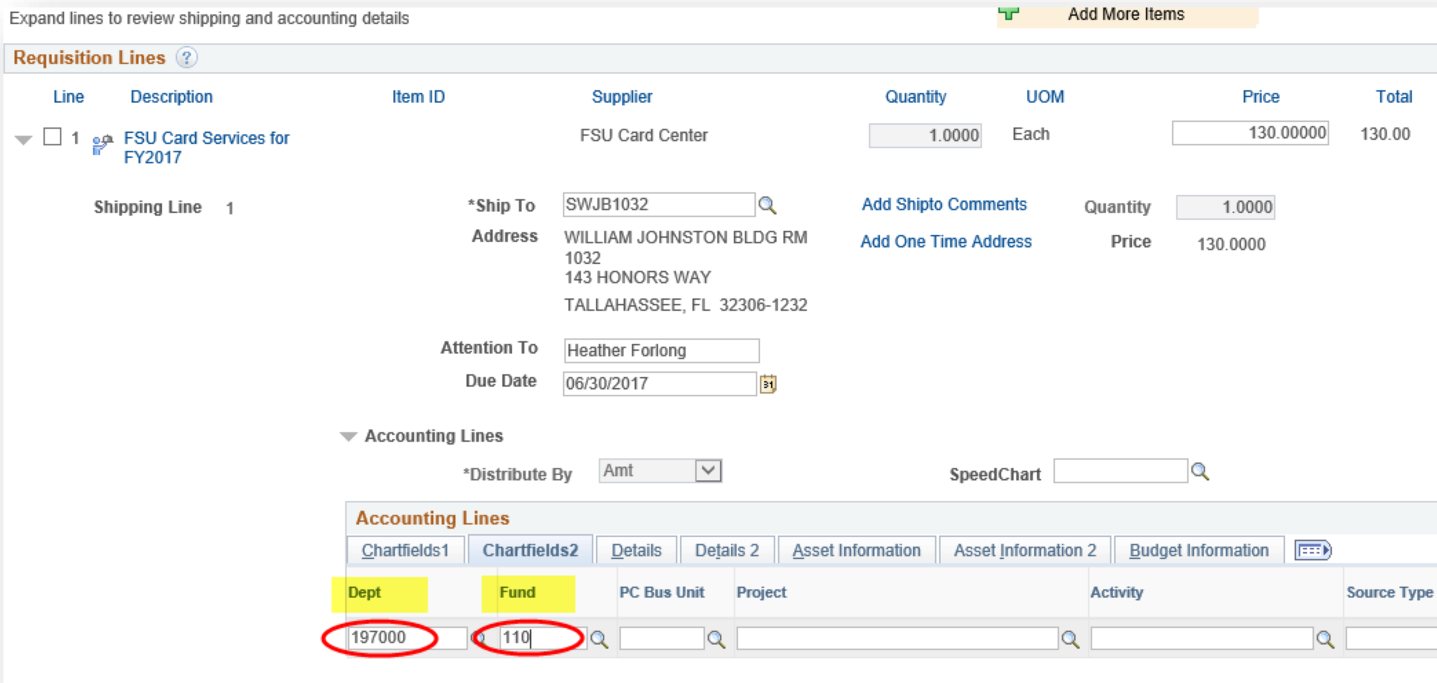
a. Expand the lines using the small grey arrows and then select the "Chartfields 2" tab:



b. 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.***

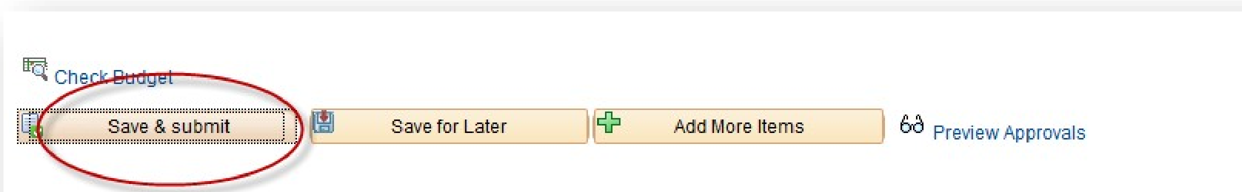
ii. A requisition can include multiple non-project combinations (including optional chartfields).



c. **Repeat steps a and b for all lines.**

19. Review your requisition.

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



21. 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.