

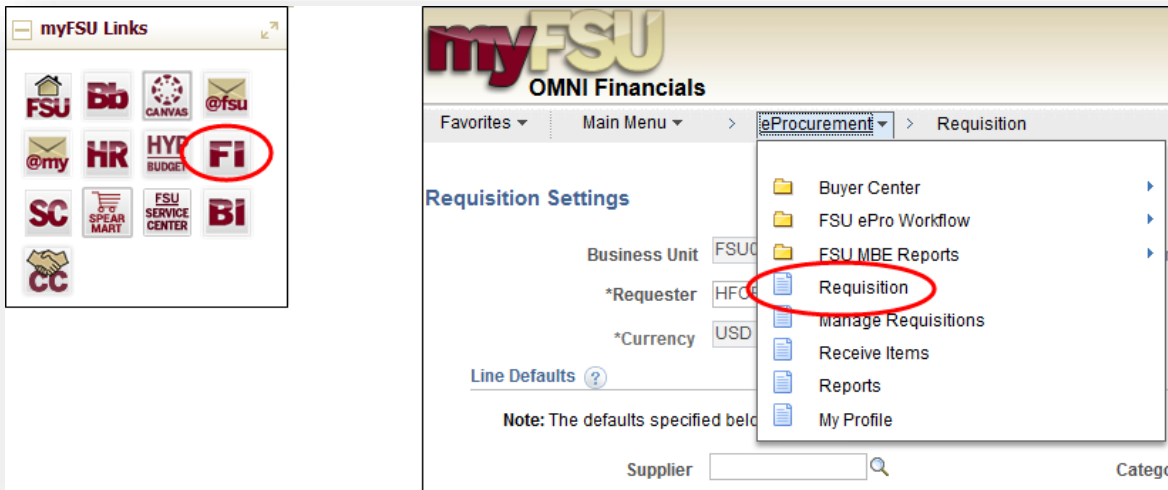


# OMNI - Auxiliary AR / Billing - Warehouse Rental

## 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.

**Requisition Settings**

Business Unit: FSU01 Florida State University Requisition Name:

\*Requester: HFORLONG Heather Forlong Priority: Medium

\*Currency: USD

**Line Defaults**

Note: The defaults specified below will be applied to requisition lines.

Supplier:  Category:

Supplier Location:  Unit of Measure:

**Shipping Defaults**

Ship To: SWJB1032 Add One Time Address

Due Date:  Attention:

**Accounting Defaults**

Percent	Location	GL Unit	Dept	Fund	PC Bus Unit	Project	Activity
<input type="text"/>	SWJB1032	FSU01	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>



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. AUX0000008 Warehouse

**Supplier Search**

Supplier ID

Name

Short Supplier Name

Alternate Supp Name

City

Country   State

Postal Code

**Search Results** Personalize | Find | View All |   First  1-6 of 6  Last

Supplier ID	Supplier Name	Default Location	Default Location Description	Address	City	State	
1 <a href="#">AUX0000002</a>	OBS Copy Program	001	Main	Florida State University	Tallahassee	FL	<input type="button" value="📄"/>
2 <a href="#">AUX0000003</a>	OBS Postal Services	001	Main	Florida State University	Tallahassee	FL	<input type="button" value="📄"/>
3 <a href="#">AUX0000006</a>	FSU Card Center	001	Main	Florida State University	Tallahassee	FL	<input type="button" value="📄"/>
4 <a href="#">AUX0000007</a>	Parking and Transportation	001	Main	Florida State University	Tallahassee	FL	<input type="button" value="📄"/>
5 <a href="#">AUX0000008</a>	<b>Warehouse</b>	001	Main	Florida State University	Tallahassee	FL	<input type="button" value="📄"/>
6 <a href="#">AUX0000009</a>	FSU Information Technology Service	001	MAIN	296 Champions Way	Tallahassee	FL	<input type="button" value="📄"/>

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



- 6. Search for the Category Code. 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, select the following Category Code:
    - i. AUX\_WARE000001

**Requisition Settings**

Business Unit  Florida State University Requisition Name

\*Requester  Heather Forlong Priority

\*Currency

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**Line Defaults**

Supplier  Category

Supplier Location  Unit of Measure

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**Shipping Defaults**

Ship To  Add One Time Address

Due Date  Attention

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**Accounting Defaults** Personalize | Find | First

Chartfields1	Details	Asset Information					
Percent	Location	GL Unit	Dept	Fund	PC Bus Unit	Project	Activity
<input type="text"/>	<input type="text" value="SWJB1032"/>	<input type="text" value="FSU01"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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

**Requisition Settings**

Business Unit  Florida State University Requisition Name

\*Requester  Heather Forlong Priority

\*Currency

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**Line Defaults**

Supplier  Category

Supplier Location  Unit of Measure

---

**Shipping Defaults**

Ship To  Add One Time Address

Due Date  Attention



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.

**Requisition Settings**

Business Unit  Florida State University Requisition Name

\*Requester  Heather Forlong Priority

\*Currency

**Line Defaults**

Supplier  Category

Supplier Location  Unit of Measure

**Shipping Defaults**

Ship To  [Add One Time Address](#)

**Due Date**  Attention

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

**Message**

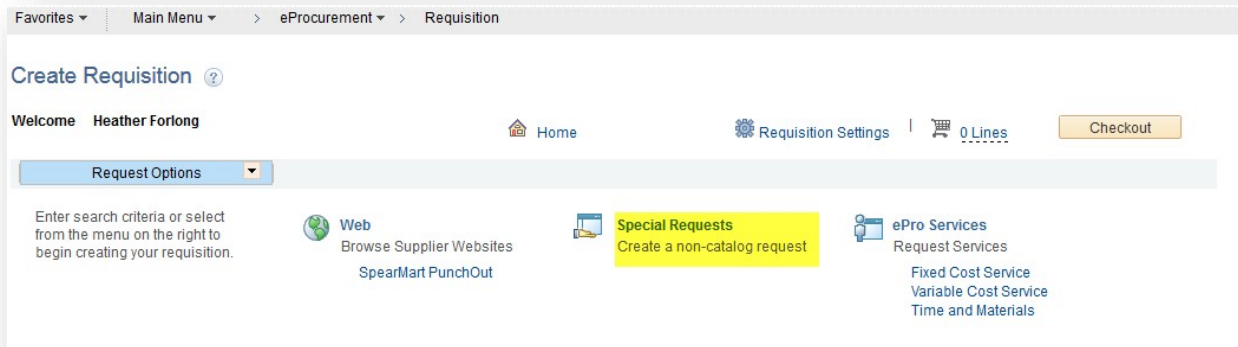
Warning -- date out of range. (15,9)

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.

10. Select "OK" at the bottom of the page.

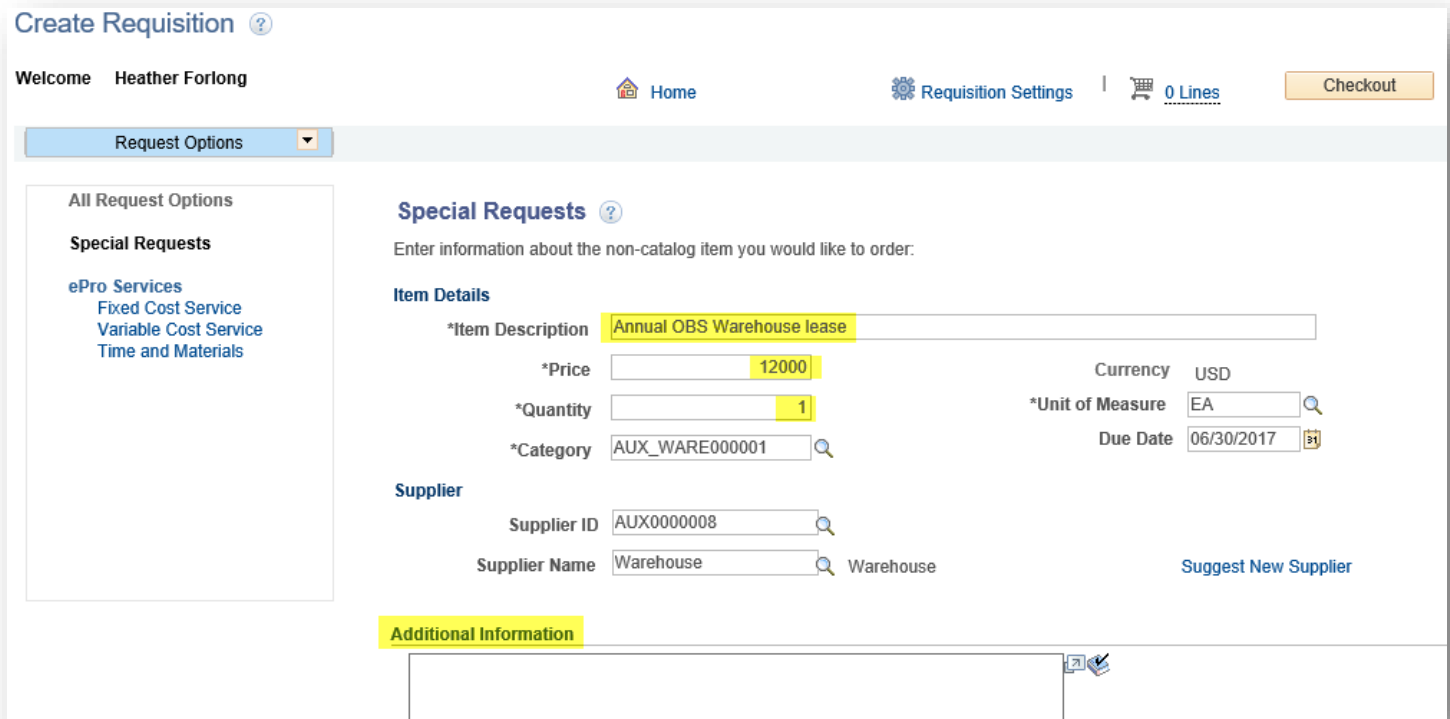


11. You will be returned to the **Create Requisition** Page. Select “Special Request” to begin adding the individual lines for your requisition (if you are directed to the Requisition Settings page again after selecting Special Requests, click “OK” to proceed).



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 for that line
  - 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.

15. When all lines 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.**

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

Expand lines to review shipping and accounting details Add More Items

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
▶ <input type="checkbox"/> 1	Annual OBS Warehouse lease		Warehouse	1.0000	Each	12000.0000	12000.00		<input type="text"/> Add	

Select All / Deselect All      Select lines to:



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

**Line Details**

Line Details ?

No Image      Line      1      Annual OBS Warehouse lease      Line Status      Open

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▼ **Item Details** ?

Merchandise Amount	12000.00 USD	<input type="checkbox"/> RFQ Required
Item ID		<input type="checkbox"/> Device Tracking
Category	AUX_WARE000001	<input type="checkbox"/> Zero Price Indicator
Original Substituted Item Description		<input type="checkbox"/> Stockless Item
Physical Nature	Goods	<input checked="" type="checkbox"/> Amount Only
Buyer	CRAYNE	<input type="checkbox"/> Inspection Required

[Buyer Information](#)  
[Configuration Info](#)

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.”

**Message**

The quantity will be set to 1 for an amount only line. The system will reprice the line. Continue? (10150,238)

The Requisition quantity will be set to 1 for an amount only line, the system will reprice the requisition line for you.

e. Repeat steps a – d for all lines.



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

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

Expand lines to review shipping and accounting details Add More Items

**Requisition Lines** ?

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete			
1	Annual OBS Warehouse lease		Warehouse	1.0000	Each	12,000.00000	12000.00		Add				
Shipping Line 1		*Ship To	SWJB1032	Add Shipto Comments	Quantity	1.0000							
		Address	WILLIAM JOHNSTON BLDG RM 1032 143 HONORS WAY TALLAHASSEE, FL 32306-1232	Add One Time Address	Price	12000.0000							
		Attention To	Heather Forlong										
		Due Date	06/30/2017										
Accounting Lines		*Distribute By	Amt		SpeedChart								
<b>Accounting Lines</b>													
Chartfields1		Chartfields2		Details		Details 2		Asset Information		Asset Information 2		Budget Information	
Dept	Fund	PC Bus Unit	Project	Activity			Source Type	Category	Subcategory				

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 department/fund combinations (including optional chartfields).

Expand lines to review shipping and accounting details Add More Items

**Requisition Lines** ?

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete			
1	Annual OBS Warehouse lease		Warehouse	1.0000	Each	12,000.00000	12000.00						
Shipping Line 1		*Ship To	SWJB1032	Add Shipto Comments	Quantity	1.0000							
		Address	WILLIAM JOHNSTON BLDG RM 1032 143 HONORS WAY TALLAHASSEE, FL 32306-1232	Add One Time Address	Price	12000.0000							
		Attention To	Heather Forlong										
		Due Date	06/30/2017										
Accounting Lines		*Distribute By	Amt		SpeedChart								
<b>Accounting Lines</b>													
Chartfields1		Chartfields2		Details		Details 2		Asset Information		Asset Information 2		Budget Information	
Dept	Fund	PC Bus Unit	Project	Activity			Source Type						
197000	110												





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

19. Review your requisition for accuracy.

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.