OMNI Auxiliary AR/Billing: Center for Genomics & Personalized Medicine

Center for Genomics & Personalized Medicine

Placing an Order

All new orders are placed with the appropriate lab manager using the auxiliary's approved form. For more information, please visit the Center for Genomics & Personalized Medicine website. 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.**

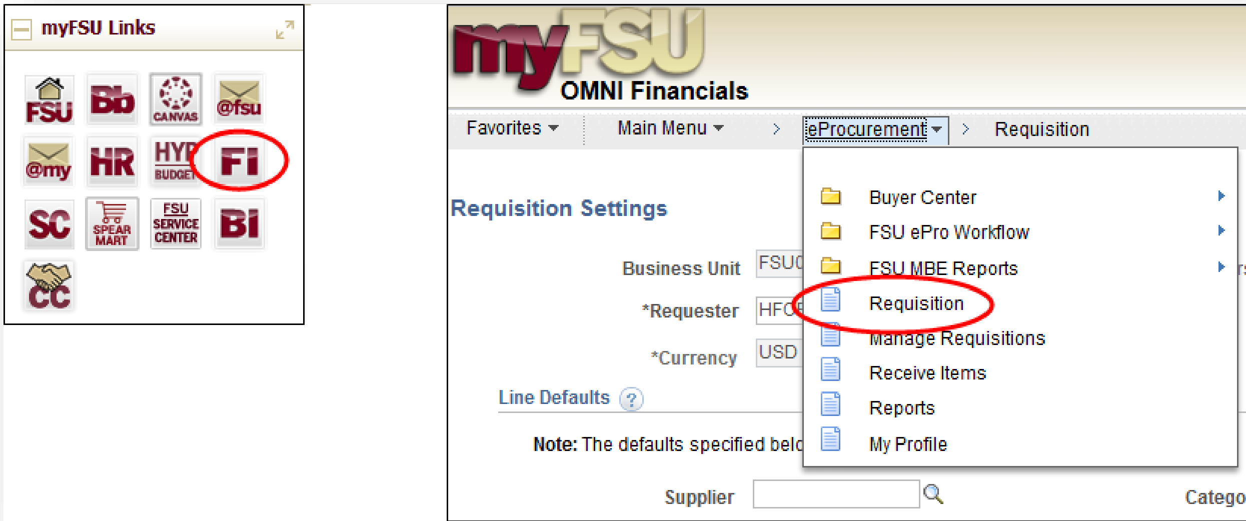
Creating a Requisition

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.

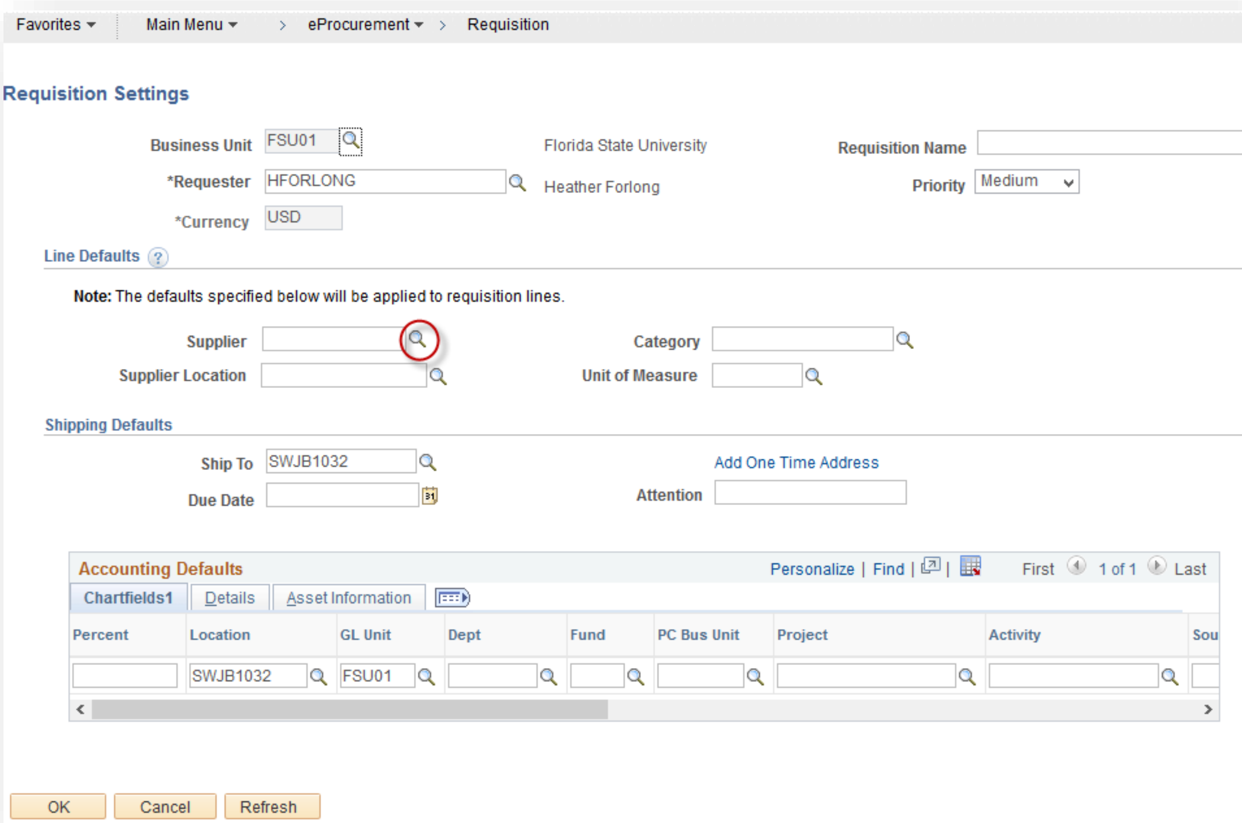
1. Determine your requisition amount as described separately on the Controller's Office Auxiliary Accounting training materials page. Your department's Budget Account Manager may have already performed this task for you.
2. First, decide which vendor and category code(s) you will use. This auxiliary has only one vendor and only one category code 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	Category Code Detail
AUX0000019	Ctr for Genomics & Personalized Medicine	AUX_GEN0000001	Ctr Genomics-Service & Analysis Charges	Charges for the Center for Genomics & Personalized Medicine Auxiliary's services and analysis

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

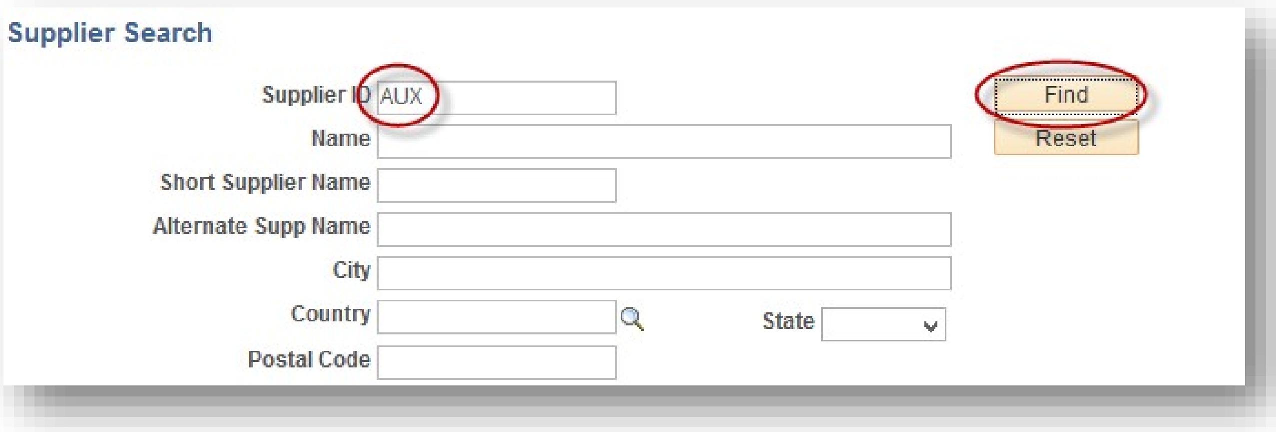


4. You will land on the **Requisition Settings** page. Click the magnifying glass to the right of the “Supplier” field to look up your supplier.



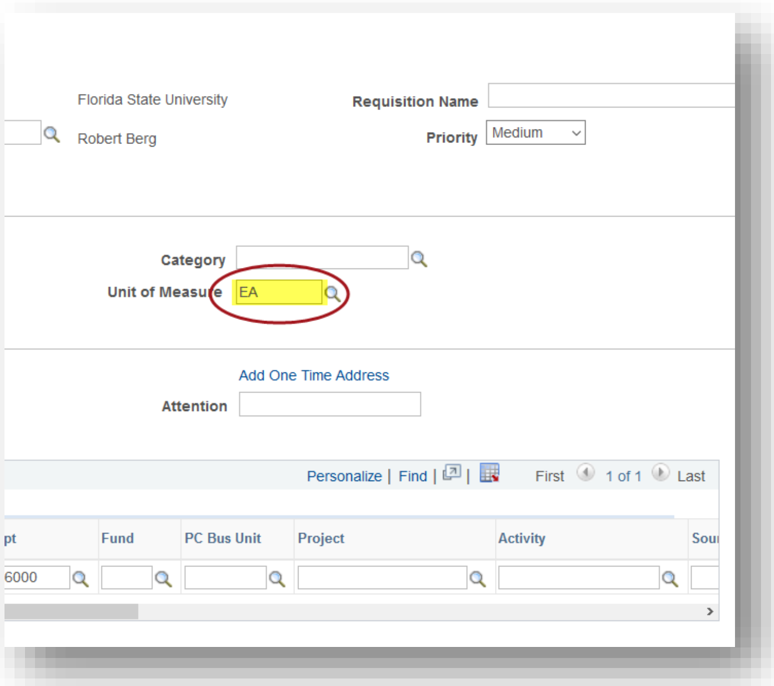
5. Search for your supplier. All internal suppliers will begin with “AUX.” Type “AUX” in the Supplier ID field and select “Find.” The search results will show a list of internal suppliers. Select the appropriate supplier.
    a. You must enter a supplier that begins with AUX. For this requisition, the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

Supplier ID	Supplier Name
AUX0000019	Ctr for Genomics&Pers Med Aux

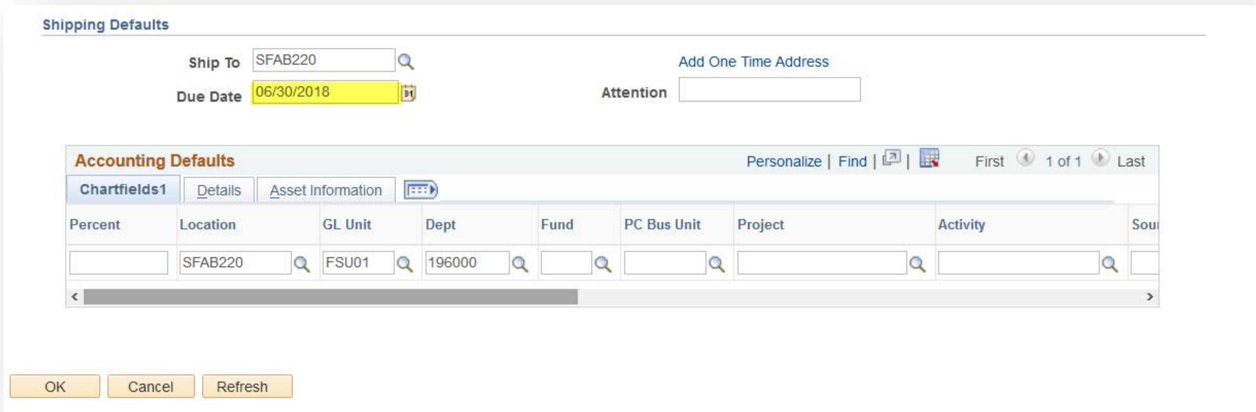


6. The system will bring you back to the **Requisition Settings** page with the supplier information included.

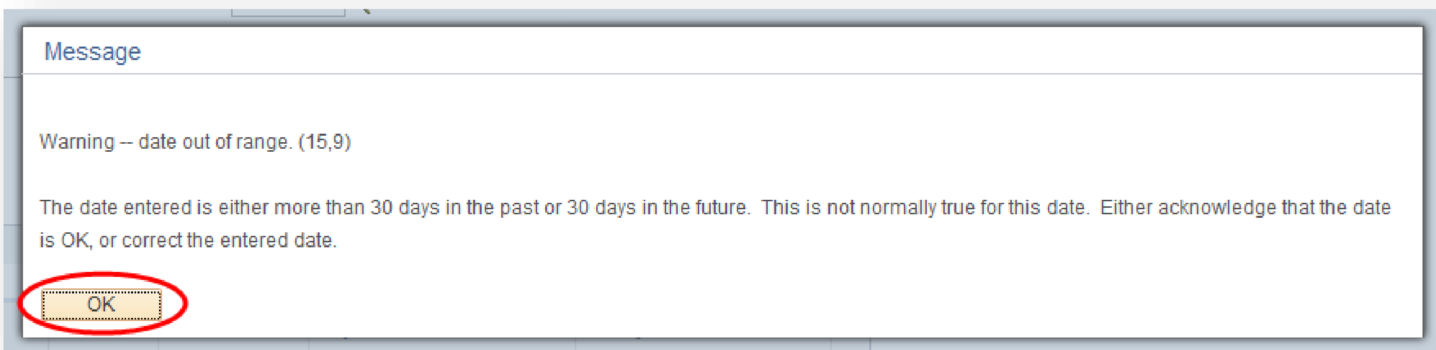
7. Choose a Unit of Measure. **For internal requisitions, always choose “EA.”**



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.**

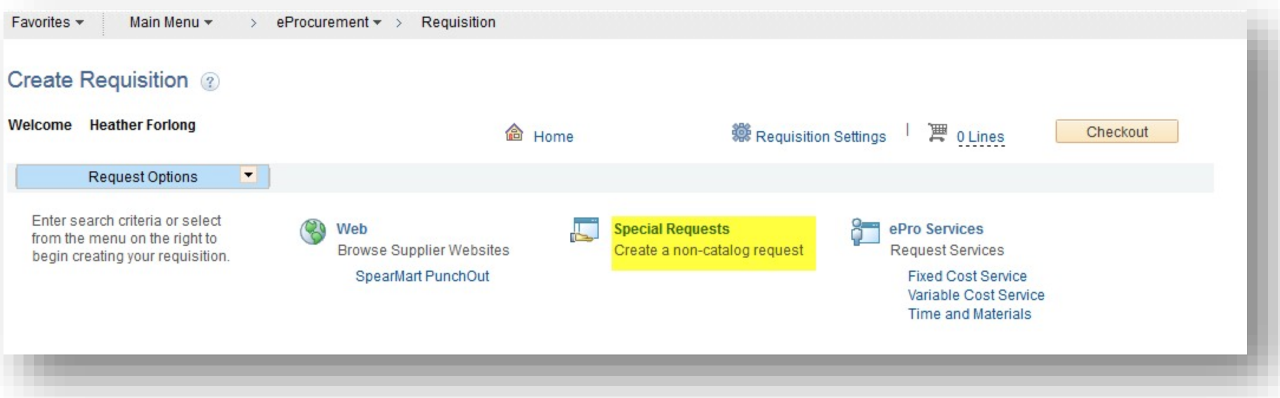


9. If you receive the following warning message after entering the date, click "OK".



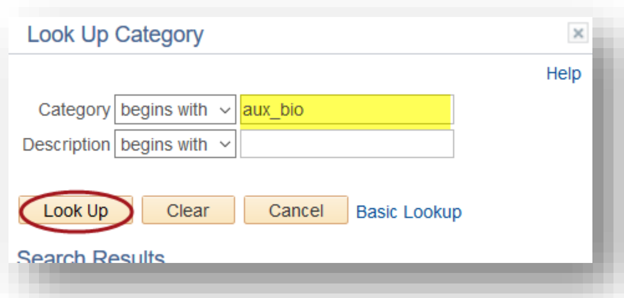
10. When finished, select "OK" at the bottom of the screen.

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).



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_GEN**” 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 Detail	Use only with this Supplier	Supplier Name
AUX_GEN0000001	Ctr Genomics-Service & Analysis Charges	AUX0000019	Ctr for Genomics&Personalized Med Aux



e. 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.

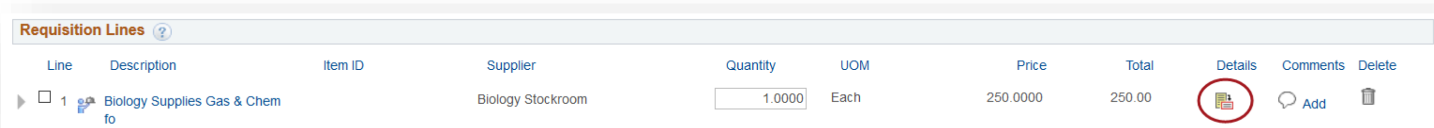
14. You will see a screen for a new, blank line. Create additional lines as needed for other category codes for this auxiliary. Please group all activity per category code onto one line versus spreading it out over multiple lines w when the category code is the same unless you are adding multiple budget 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:

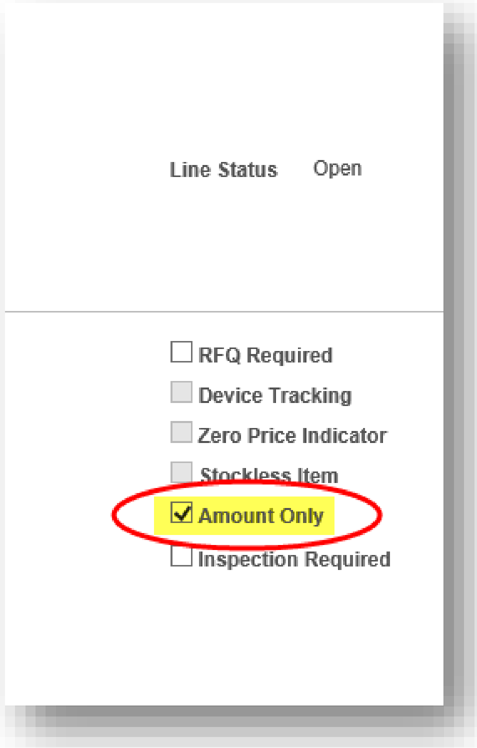
16. You will be returned to the **Checkout – Review and Submit** page.

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:

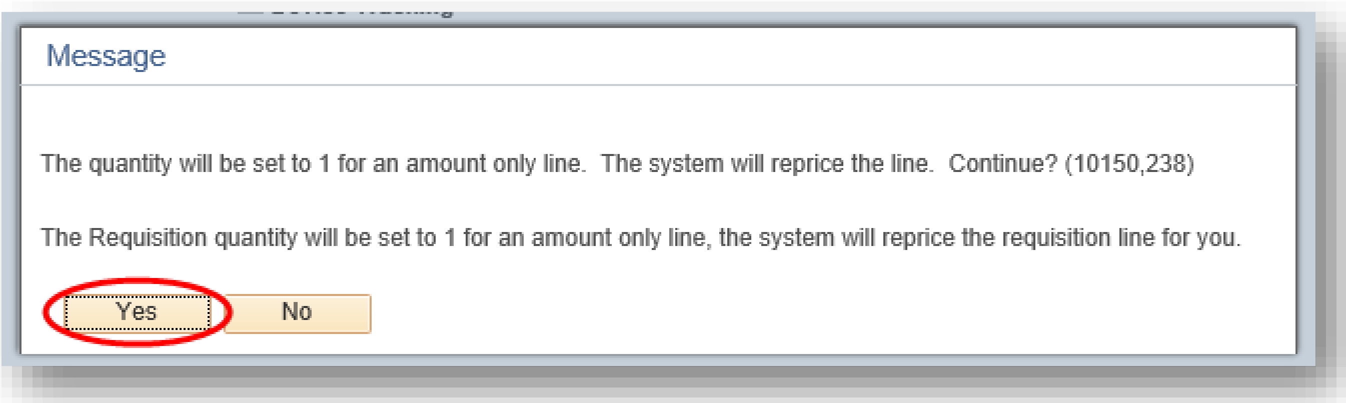


g. On the “Line Details” page, select the checkbox for “Amount Only”.



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

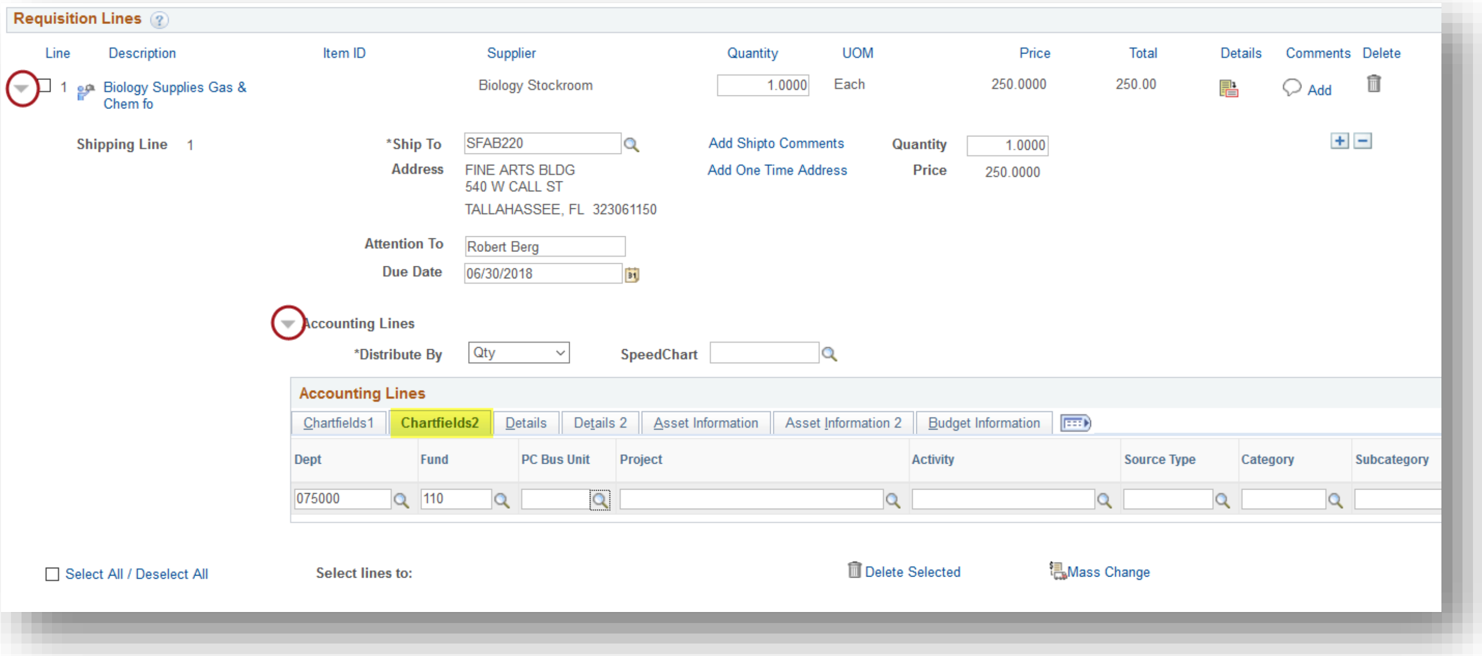
i. A message will pop up indicating that your quantity will be set to 1; this is ok. Select "Yes".



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:



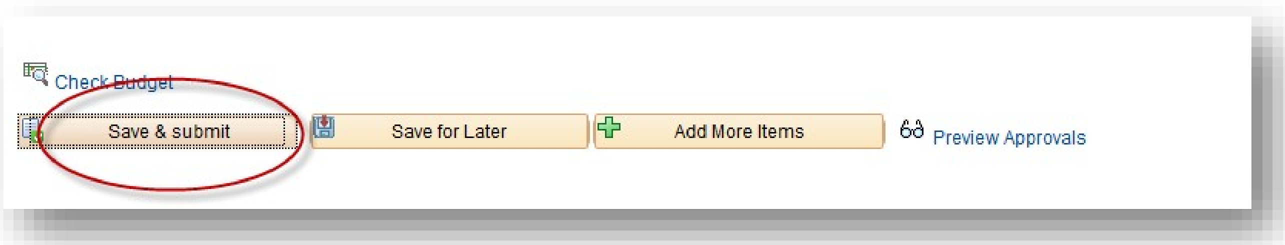
l. Enter the appropriate department ID, fund and project combination in the Chartfields 2 tab.

   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.