OMNI Auxiliary AR/Billing: Copier Services

Placing an Order

To place an order with Copier Services, complete the applicable order form on the Departmental Copier Services website. All new rental & purchase agreements require the buying department to include Purchase Order & Line information on the order form.

Creating a Requisition

This requisition is very much like other blanket purchase orders that departments are accustomed to. Review the step-by-step guide below to ensure the appropriate vendor & 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. Using the Copy Program order forms, estimate additional costs or savings for product additions/cancellations that might apply throughout the year.

3. Navigate to page: https://my.fsu.edu > “FI” > Internal/Auxiliary Requisition > Requisition 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.

![Requisition Settings](image)

5. Search for your supplier. All internal suppliers will begin with “AUX.” Type “AUX” in the Supplier ID field & 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 “AUX0000002 | OBS Copy Program”

![Supplier Search](image)
6. The system will bring you back to the **Requisition Settings** page with the supplier information included.

7. Choose a Unit of Measure. **Always choose “EA” for internal requisitions.**
8. Enter a due date. For year-long, open ended PO’s such as what would be typical for this line of business, use 06/30 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 a line for your copier rental (base rental & cost per copy should be combined):
   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*
   c. **Search for your Category Code(s).** Type “AUX_COPY” into the Category field & select the magnifying glass to search for the category code. It is very important that you select the appropriate internal category code.

<table>
<thead>
<tr>
<th>Category Code</th>
<th>Description</th>
<th>Comments</th>
<th>Expense Account</th>
</tr>
</thead>
<tbody>
<tr>
<td>AUX_COPY0000001</td>
<td>Copier Rentals</td>
<td>Copier lease and usage charges including b/w &amp; color copies</td>
<td>741831</td>
</tr>
<tr>
<td>AUX_COPY0000004</td>
<td>Copier Purchase</td>
<td>Departmental copier purchase (separate from copier lease or monthly copy usage charges)</td>
<td>741121</td>
</tr>
</tbody>
</table>

*Note: As of September 2019, AUX_COPY0000003 (Copier Fees) was inactivated. All charges, including b/w & color copies, run through AUX_COPY0000001.*
d. If needed, add notes in the “Additional Information” field. This will be 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 other copier category codes.

15. Departments that are charged fees are rare; this is a special case. Contact obs@fsu.edu if you are unsure whether you should encumber for copier fees. Use category code AUX_COPY0000003 for this activity.

16. If you are purchasing a copier at the end of your lease, create a line for AUX_COPY0000004 for this activity. Consult with OBS staff if you have questions.
17. When you are ready to check out, select “Checkout” at the top of the page:

18. You will be taken to the Checkout – Review & Submit page.

19. 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”. Additionally, the Buyer field MUST remain as “CRAYNE”.

   c. Scroll to the bottom of the page & 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) through (d) for all lines.
20. Enter your accounting information (department ID, fund, project) as shown below:
   a. Expand the lines using the small grey arrows & then select the “Chartfields2” tab:

   ![Requisition Lines Image]

   b. Enter the appropriate department ID, fund & project combination in the Chartfields2 tab.
      
      i. **NOTE:** A project must be on its own requisition. A requisition can not include multiple projects or a project & multiple non-project funds.
      
      ii. A requisition can include multiple non-project combinations (including optional chart fields).

   ![Accounting Lines Image]

   c. Repeat steps (a) & (b) for all lines.

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

   ![Save & Submit Image]

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