OMNI Auxiliary AR/Billing: Jim Moran Building

Placing an Order

All orders are placed with the appropriate Director using the auxiliary’s approved form. For more information, please visit the Jim Moran Building 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. 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. AUX0000035 Jim Moran Building
5. The system will bring you back to the Requisition Settings page with the supplier information included.
6. Choose a Unit of Measure. **For internal requisitions, always choose “EA.”**

7. 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.**
8. If you receive the following warning message after entering the date, click “OK”.

![Message]

9. When finished, select “OK” at the bottom of the screen.

10. 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).
11. Create line(s) for your services as appropriate.
   a. Enter the item description as desired.

   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_JMB” into the Category field, and then select the magnifying glass to search for JMB category codes. It is very important that you select the appropriate internal category code.
   i. For this line of business, **ALWAYS** select the Category Code **AUX_JMB000001**. Rental services are covered by a single category code.

<table>
<thead>
<tr>
<th>Category Code</th>
<th>Description</th>
<th>Detail</th>
<th>Expense Account</th>
</tr>
</thead>
<tbody>
<tr>
<td>AUX_JMB000001</td>
<td>Jim Moran Building Rental &amp; Rel. Svcs</td>
<td>Rental of Jim Moran Building spaces and related charges</td>
<td>741741</td>
</tr>
</tbody>
</table>

   d. Add notes as needed in the “Additional Information” field. This information is for your research purposes only.
12. When ready, select “Add to Cart” at the bottom of the page.

13. You will see a new, blank line. You may choose to add additional lines if needed. 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.

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

15. You will be returned to the Checkout – Review and Submit page.
16. 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 under the “Details” column for the line:

   ![Requisition Lines Image]

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

   ![Line Details Image]

   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 Image]

   e. Repeat steps a – d for all lines.
17. 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. **IMPORTANT:** A project must be on its own requisition. A requisition can not include multiple projects or a project and multiple non-project funds.

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

   c. Repeat steps a and b for all lines.
18. When reviewed and ready to submit for approval, click **Save and Submit** at the bottom of the page:

![Image of OMNI training guide](image)

19. 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.