



OMNI Auxiliary AR/Billing: Facilities

Placing an Order

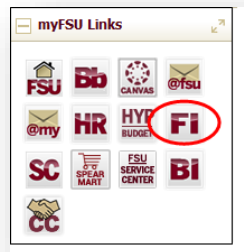
FSU's Facilities department provides services to FSU departments for maintenance and repairs, utilities, waste management, custodial, lease, and other activities.

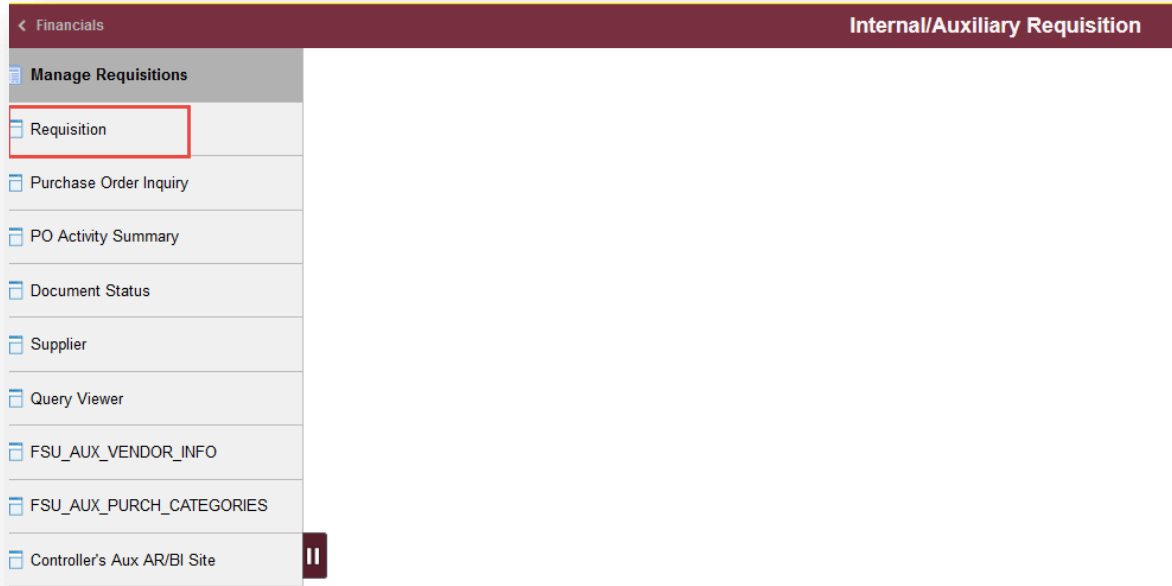
Place all orders through the Facilities Work Order process. For more information, please visit the [Facilities website](#). Please be aware that a Purchase Order serves to encumber funds and enable internal charges. **A Purchase Order does not serve to place an order with this or any selling auxiliary.**

Creating a Requisition

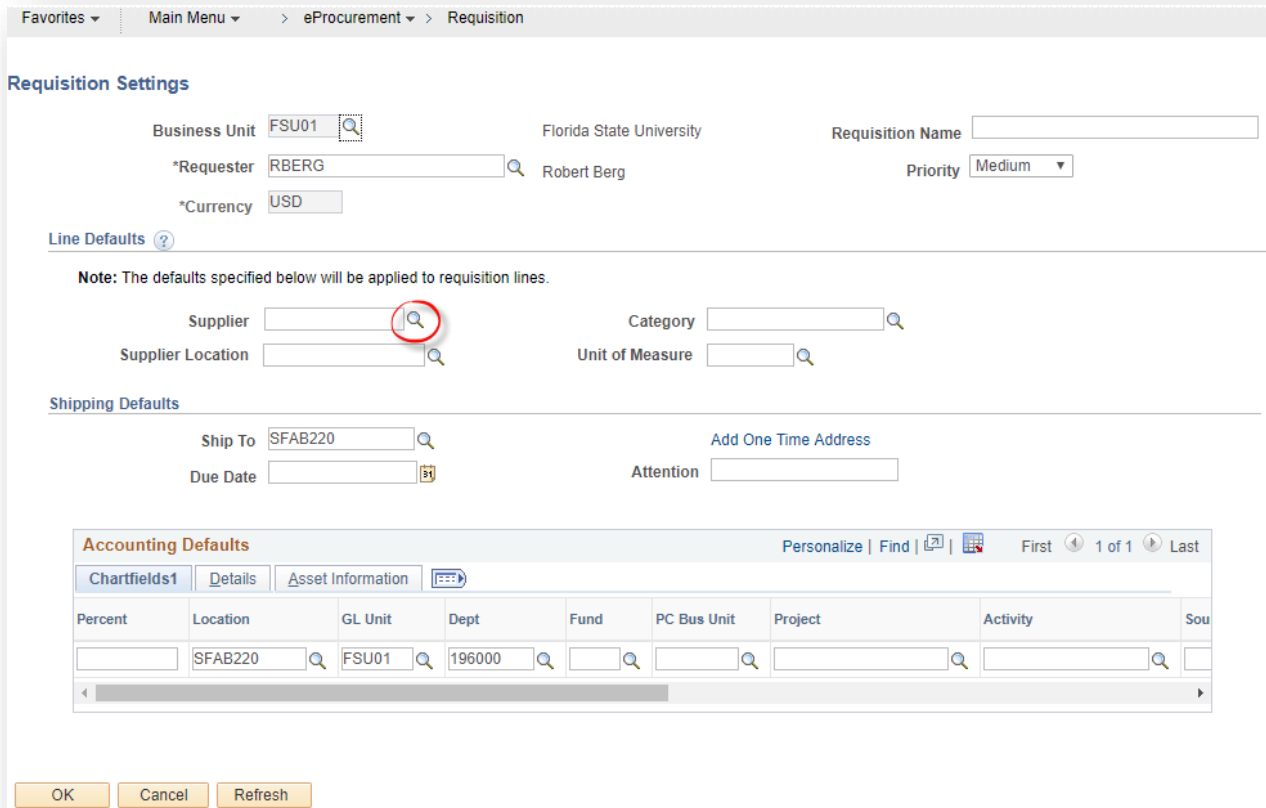
This requisition is very much like other blanket purchase orders departments are accustomed to. Review the below step-by-step guide to ensure the appropriate vendor and categories are selected.

1. Determine your requisition amount as described separately on the [Controller's Office Auxiliary Services 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 > Internal/Auxiliary Requisition 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. **AUX0000050 FSU Facilities**

Supplier Search

Supplier ID

Name

Short Supplier Name

Alternate Supp Name

City

Country State

Postal Code

Search Results

1-1 of 1 | View All

	Supplier ID	Supplier Name	Default Location	Default Location Description	Address	City	State		
<input type="radio"/>	47	AUX0000050	FSU Facilities	001	main	969 Learning Way	Tallahassee	FL	



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

Requisition Settings

Business Unit Florida State University Requisition Name

*Requester Robert Berg Priority

*Currency

Line Defaults

Supplier Category

Supplier Location Unit of Measure

Shipping Defaults

Ship To [Add One Time Address](#)

Due Date Attention

Accounting Defaults Personalize | Find | First 1 of 1 Last

Percent	Location	GL Unit	Dept	Fund	PC Bus Unit	Project	Activity	Sou
<input type="text"/>	<input type="text" value="SFAB220"/>	<input type="text" value="FSU01"/>	<input type="text" value="196000"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

OK Cancel Refresh



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

Requisition Settings

Business Unit: FSU01 Florida State University
*Requester: RBERG Robert Berg
*Currency: USD
Requisition Name:
Priority: Medium

Line Defaults

Supplier: AUX0000050
Supplier Location: 001
Category:
Unit of Measure: EA

Shipping Defaults

Ship To: SFAB220 Add One Time Address
Due Date:
Attention:

Accounting Defaults

Dist	Percent	Location	GL Unit	Dept	Fund	PC Bus Unit	Project	Activity
1		SFAB220	FSU01	196000				

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.

Requisition Settings

Business Unit: FSU01 Florida State University
*Requester: RBERG Robert Berg
*Currency: USD
Requisition Name:
Priority: Medium

Line Defaults

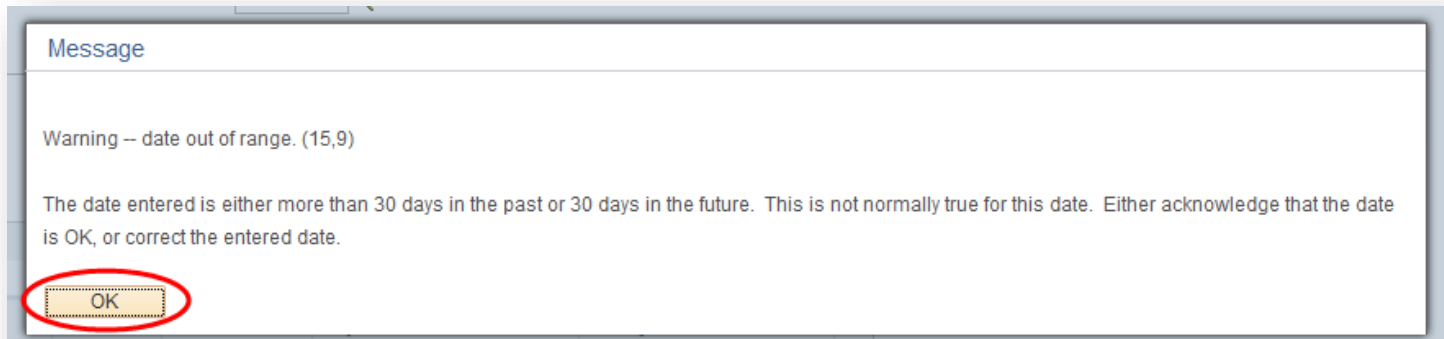
Supplier: AUX0000050
Supplier Location: 001
Category:
Unit of Measure: EA

Shipping Defaults

Ship To: SFAB220 Add One Time Address
Due Date: 6/30/2021
Attention:

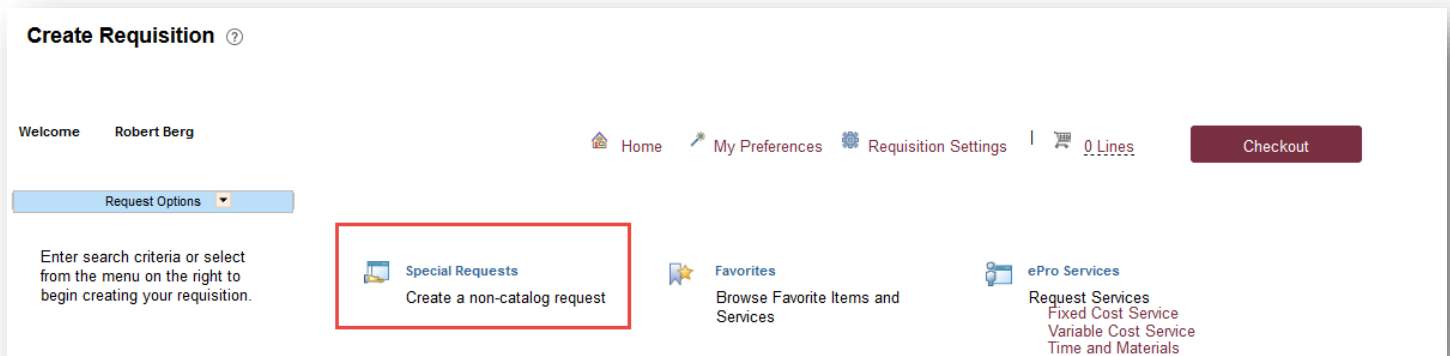


8. If you receive the following warning message after entering the date, click “OK”.



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_FACILITIES” into the Category field, and then select the magnifying glass to search for the category codes needed. It is very important that you select the appropriate internal category code.

Category Code	Description	Detail	Expense Account
AUX_FACILITIES01	Facilities Maintenance & Repairs	Charges for maintenance and repair services provided by FSU's Facilities department. Includes painting, pest control, electrical, industrial cleaning and plumbing services as well as the repair/maintenance of lab, telecom, a/v, elevator, heating/AC, other heavy equipment. NOTE: DO NOT CREATE ONE LINE PER WORK ORDER/SERVICE REQUEST. Create only one po line for all anticipated work orders for the fiscal year on a given budget (dept/fund/etc).	740930
AUX_FACILITIES02	Facilities Fuel	Charges for fuel (unleaded and diesel) provided by FSU's Facilities department.	741391
AUX_FACILITIES03	Facilities Utilities Charges	Charges for all utility services provided by FSU's Facilities department (electric, water, sewer, chilled water, outdoor lighting, fire service fees, natural & LP gas, etc. including regularly scheduled waste management).	740800
AUX_FACILITIES04	Facilities Utilities - Waste Mgt Svcs	Services made through a Special Services Request for charges for roll off waste management and disposal services provided by FSU's Facilities department, confidential shredding, and pull fees.	740832
AUX_FACILITIES05	Facilities Services - Event & Other	Charges for Facilities services unrelated to maintenance & repairs, such as event table/chair setup services, event-related other services, box delivery, and other service charges.	740231
AUX_FACILITIES06	Facilities Services - Custodial	Charges for Facilities services for custodial services unrelated to maintenance & repairs; includes carpet, laundry/linen and general cleaning services.	740262



AUX_FACILITIES07	Facilities Services - Landscaping	Charges for Facilities services for grounds and landscaping services unrelated to maintenance & repairs; includes lawn care, trimming, etc.	740268
AUX_FACILITIES99	Facilities Lease	Rental of Campus spaces and related charges from the FSU Facilities Department	741741
<i>*AUX_FAC0000001</i>	<i>CIP FACILITIES</i>	<i>FOR FACILITIES DESIGN & CONSTRUCTION ONLY</i>	<i>780001</i>

- d. Add notes as needed in the “Additional Information” field. This information is for your research purposes only.
 - e. Enter the price as the total amount expected to spend during the fiscal year.
 - f. Enter a Quantity = 1.
12. When ready, select “Add to Cart” at the bottom of the page.



Special Requests ?

Enter information about the non-catalog item you would like to order:

Item Details

*Item Description	Facilities Work Orders for FY2021	
*Price	5000	*Currency USD
*Quantity	1	*Unit of Measure EA
*Category	AUX_FACILITIES01	Due Date 06/30/2021

Supplier

Supplier ID	AUX0000050	
Supplier Name	FSU Facilities	FSU Facilities Suggest New Supplier
Supplier Item ID		

Additional Information

Work orders for the Department of Art for FY2021.

Send to Supplier Show at Receipt Show at Voucher

Add to Cart

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 services have been added and you are ready to check out, select “Checkout” at the top of the page:



Create Requisition ?

Welcome **Robert Berg**

[Home](#)
[My Preferences](#)
[Requisition Settings](#)
|
1 Line
Checkout

Request Options ▼

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:

Checkout - Review and Submit

Review the item information and submit the req for approval.

[Requisition Settings](#)

Requisition Summary

Business Unit: Florida State University
 *Requester: Robert Berg
 *Currency:
 Requisition Name:
 Priority:

Cart Summary: Total Amount 5,000.00 USD

Expand lines to review shipping and accounting details [Add More Items](#)

Requisition Lines ?

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details
1	Facilities Work Orders for FY2		FSU Facilities	1	Each	5,000.00000	5000.00	

Select All / Deselect All
 Select lines to:
 [Add to Favorites](#)
 [Add to Template\(s\)](#)
 [Delete Selected](#)
 [Mass Change](#)

a. On the “Line Details” page, select the checkbox for “Amount Only”. Additionally, the Buyer field **MUST** remain as “FSU_AUX_AUTOSOURCE_BUYER”.



▼ Item Details ?

Merchandise Amount	1.00 USD	<input type="checkbox"/> RFQ Required
Item ID		<input type="checkbox"/> Device Tracking
Category		<input type="checkbox"/> Zero Price Indicator
Original Substituted Item		<input type="checkbox"/> Stockless Item
Description		<input checked="" type="checkbox"/> Amount Only
Physical Nature	Goods	<input type="checkbox"/> Inspection Required
Buyer	FSU_AUX_AUTOSOURCE_BUY	

Buyer Information
Configuration Info

- b. Scroll to the bottom of the page and select “OK”.
- c. 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.

d. 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:



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	QMI Research & Analysis		FCRR - QMI Auxiliary	1.0000	Each	100.00000	100.00		Add	

Shipping Line 1

*Ship To: SFAB220
 Address: FINE ARTS BLDG, 540 W CALL ST, TALLAHASSEE, FL 323061150
 Attention To: Robert Berg
 Due Date: 06/30/2019

Accounting Lines

*Distribute By: Amt SpeedChart

Accounting Lines

Chartfields1	Chartfields2	Details	Details 2	Asset Information	Asset Information 2	Budget Information
Dept	Fund	PC Bus Unit	Project	Activity	Source Type	Category

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).

Expand lines to review shipping and accounting details + Add More Items

Requisition Lines ?

Line	Description	Item ID	Supplier	Quantity	UOM	Price
1	QMI Research & Analysis		FCRR - QMI Auxiliary	1.0000	Each	100.00000

Shipping Line 1

*Ship To: SFAB220
 Address: FINE ARTS BLDG, 540 W CALL ST, TALLAHASSEE, FL 323061150
 Attention To: Robert Berg
 Due Date: 06/30/2019

Accounting Lines

*Distribute By: Amt SpeedChart

Accounting Lines

Chartfields1	Chartfields2	Details	Details 2	Asset Information	Asset Information 2	Budget Information
Dept	Fund	PC Bus Unit	Project	Activity		
196000	110					

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:



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.