



OMNI Auxiliary AR/Billing: Center for Academic & Professional Development (CAPD)

Placing an Order

All orders are placed with the appropriate Director using the auxiliary’s approved form. For more information, please visit the [CAPD Website](#). Please be aware that a Purchase Order serves to encumber funds & 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 & 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” > Internal/Auxiliary Requisition > Requisition as shown below:





- 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 Florida State University Requisition Name

*Requester Robert Berg Priority ▼

*Currency

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

Supplier Category

Supplier Location Unit of Measure

Shipping Defaults

Ship To Add One Time Address

Due Date Attention

Accounting Defaults

Dist	Percent	Location	GL Unit	Dept	Fund	PC Bus Unit	Project	Activity	So
1	<input type="text"/>	<input type="text" value="SFAB220"/> <input type="button" value="Q"/>	<input type="text" value="FSU01"/> <input type="button" value="Q"/>	<input type="text" value="196000"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/>

- 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.
 - You must enter a supplier that begins with AUX. For this requisition, the appropriate supplier is **“AUX000065 | Center for Academic & Professional Dev”**

Supplier Search

Supplier ID

Name

Short Supplier Name

Alternate Supp Name

City

Country State

Postal Code

Enter search criteria to find a supplier.



Supplier Search

Supplier ID: AUX Find

Name: Reset

Short Supplier Name:

Alternate Supp Name:

City:

Country: State:

Postal Code:

Search Results

61-65 of 65

	Supplier ID	Supplier Name	Default Location	Default Location Description	Address	City	State	
<input type="radio"/>	61 AUX0000061	Cntr for Economic Forecasting & Analysis	001	MAIN	3200 Commonwealth Blvd	Tallahassee	FL	<input type="button" value="Q"/>
<input type="radio"/>	62 AUX0000062	College of Law Research Center	001	MAIN	425 W. Jefferson St	Tallahassee	FL	<input type="button" value="Q"/>
<input type="radio"/>	63 AUX0000063	FLVC - Florida Virtual Campus	001	MAIN	1753 West Paul Dirac Dr.	Tallahassee	FL	<input type="button" value="Q"/>
<input type="radio"/>	64 AUX0000064	College of Medicine MedShare	001	Main	1115 W. Call St	Tallahassee	FL	<input type="button" value="Q"/>
<input checked="" type="radio"/>	65 AUX0000065	Center for Academic & Professional Dev	001	Main	555 W Pensacola St	Tallahassee	FL	<input type="button" value="Q"/>

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

Requisition Settings

Business Unit: FSU01 Florida State University

*Requester: RBERG Robert Berg

*Currency: USD

Requisition Name:

Priority:

Line Defaults

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

Supplier: AUX0000065

Supplier Location: 001

Category:

Unit of Measure:

6. Choose a Unit of Measure. **Always choose "EA" for internal requisitions.**



Requisition Settings

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

Line Defaults ?

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

Supplier: AUX0000065 Category: []
Supplier Location: 001 Unit of Measure: EA

- 7. Enter a due date. **For year-long, open ended POs 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 Requisition Name: []
*Requester: RBERG Robert Berg Priority: Prio
*Currency: USD

Line Defaults ?

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

Supplier: AUX0000065 Category: []
Supplier Location: 001 Unit of Measure: EA

Shipping Defaults

Ship To: SFAB220 Add One Time Address
Due Date: 06/30/2023 Attention: []

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

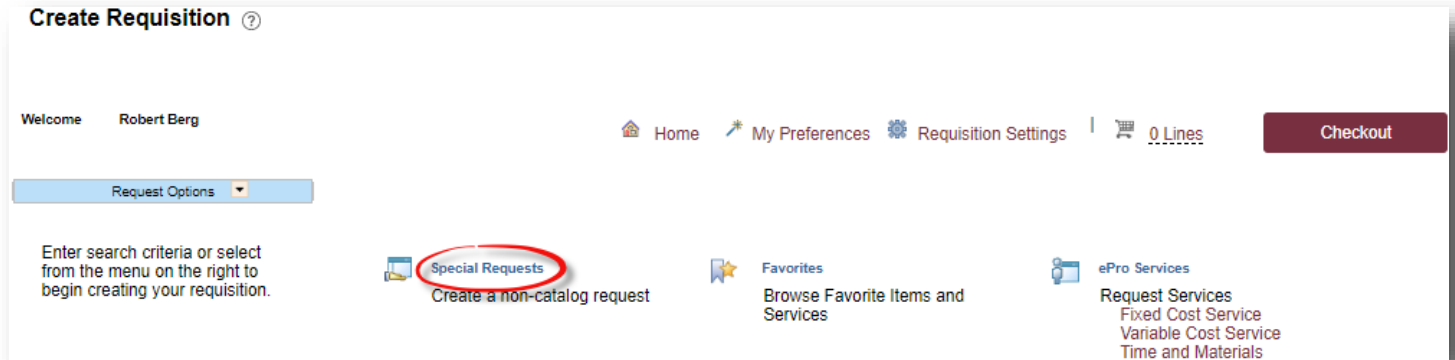
Warning -- date out of range. (15,9)

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.

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_CAPD” 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.
 - i. For this line of business, **ALWAYS** select the Category Code **AUX_CAPD0000001**.

Category Code	Description	Detail	Expense Account
AUX_CAPD0000001	CAPD Services	Charges for CAPD services	740232

- d. If needed, add notes in the “Additional Information” field. This will be for your research purposes only.



Special Requests ?

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

Item Details

*Item Description: Event Services

*Price: 500.00

*Quantity: 1

*Category: AUX_CAPD0000001

*Currency: USD

*Unit of Measure: EA

Due Date: 06/30/2023

Supplier

Supplier ID: AUX0000065

Supplier Name: Center for Academic & Prc

Center for Academic & Professional Dev

Suggest New Supplier

Manufacturer

Additional Information

Send to Supplier Show at Receipt Show at Voucher

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 “CAPD” services have been added & 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

Request Options

Checkout

15. You will be returned to the **Checkout – Review & 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:



Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	Event Services		Center for Academic & Professional Dev	1	Each	500.00	500.00		Add	

- b. 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

Item ID

Category

Original Substituted Item

Description

Physical Nature Goods

Buyer FSU_AUX_AUTOSOURCE_BUYER

RFQ Required

Device Tracking

Zero Price Indicator

Stockless Item

Amount Only

Inspection Required

- 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”.

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.

Yes No

- e. Repeat steps (a) through (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 & then select the “Chartfields 2” tab:



Requisition Lines ?

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total
1	Event Services		Center for Academic & Professional Dev	1	Each	500.00000	500.00
Shipping Line 1		*Ship To Address	SFAB220	Add Shipto Comments	Quantity	1	
		Attention To	Robert Berg	Add One Time Address	Price	500.00	
		Due Date	06/30/2023				
Accounting Lines		*Distribute By	Amt	SpeedChart			
Accounting Lines							
Chartfields1 Chartfields2 Details Details 2 Asset Information Asset Information 2 Budget Information							

b. Enter the appropriate department ID, fund & project combination in the Chartfields 2 tab.

i. **NOTE: A project must be on its own requisition. A requisition cannot include multiple projects or a project & multiple non-project funds.**

ii. A requisition can include multiple non-project combinations (including optional chart fields).

Dept	Fund	PC Bus Unit	Project	Activity
301212	320			

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

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

Check Budget

Save & submit
Save for Later
Add More Items
Preview Approvals

19. 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.