

OMNI Auxiliary AR/Billing: Cntr for Economic Forecasting & Analysis

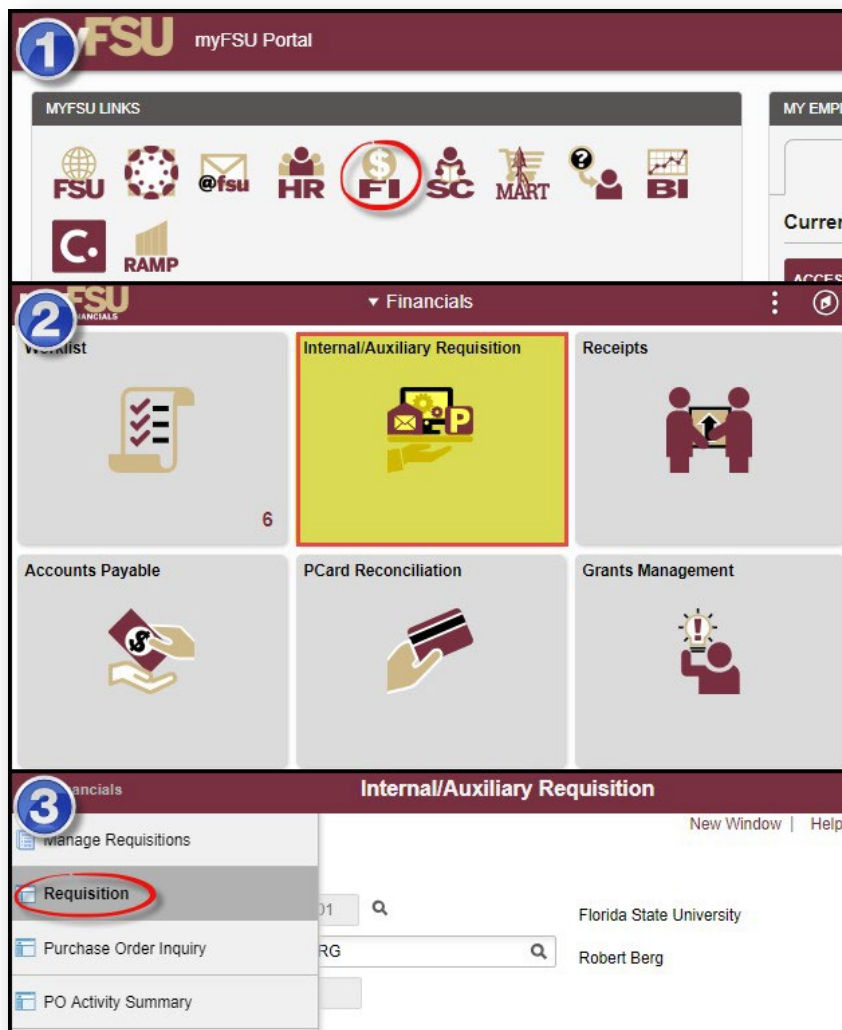
Placing an Order

All orders are placed with the appropriate Photographer using the auxiliary's approved form. For more information, please visit the [Cntr for Economic Forecasting & Analysis 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 1 by step guide to ensure the appropriate vendor & categories are selected.

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

*Requester
Robert Berg

*Currency

Requisition Name

Priority

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

1-1 of 1

Chartfields1 Details Asset Information

Dist	Percent	Location	GL Unit	Dept	Fund	PC Bus Unit	Project	Activity	Source T
1	<input type="text"/>	SFAB220	FSU01	196000	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

OK Cancel Refresh

- 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 **"AUX0000061 | Cntr for Economic Forecasting & Analysis"**

Supplier Search

Supplier ID

Name

Short Supplier Name

Alternate Supp Name

City

Country
State

Postal Code

Search Results

Search Results									
		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	
<input type="radio"/>	48	AUX0000051	Master Craftsman Studios	001	MAIN	969 Learning Way	Tallahassee	FL	
<input type="radio"/>	49	AUX0000052	FSU Police Department	001	MAIN	830 W. Jefferson St.	Tallahassee	FL	
<input type="radio"/>	50	AUX0000053	Northwest Regional Data Center - NWRDC	001	MAIN	2048 E. Paul Dirac Dr.	Tallahassee	FL	
<input type="radio"/>	51	AUX0000054	Florida Conflict Resolution Center	001	MAIN	296 Champion's Way	Tallahassee	FL	
<input type="radio"/>	52	AUX0000055	FREAC-FI Res & Enviro Anis Ctr	001	MAIN	296 Champion's Way	Tallahassee	FL	
<input type="radio"/>	53	AUX0000056	PCC Underwtr Crime Scene Investigation	001	MAIN	4750 Collegiate Dr.	Panama City	FL	
<input type="radio"/>	54	AUX0000057	PCC Space Utilization Auxiliary	001	MAIN	4750 Collegiate Dr.	Panama City	FL	
<input type="radio"/>	55	AUX0000058	Nutrition and Integrative Physiology	001	MAIN	120 Convocation Way	Tallahassee	FL	
<input type="radio"/>	56	AUX0000059	Inst for Justice Research and Developmnt	001	MAIN	2010 Levy Avenue, Suite 3400	Tallahassee	FL	
<input type="radio"/>	57	AUX0000060	Challenger Learning Center	001	Main	200 S Duval St.	Tallahassee	FL	
<input checked="" type="radio"/>	58	AUX0000061	Cntr for Economic Forecasting & Analysis	001	MAIN	3200 Commonwealth Blvd	Tallahassee	FL	
<input type="radio"/>	59	AUX0000062	College of Law Research Center	001	MAIN	425 W. Jefferson St	Tallahassee	FL	
<input type="radio"/>	60	AUX0000063	FLVC - Florida Virtual Campus	001	MAIN	1753 West Paul Dirac Dr.	Tallahassee	FL	
<input type="radio"/>	61	AUX0000064	College of Medicine MedShare	001	Main	1115 W. Call St	Tallahassee	FL	

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
Medium

Line Defaults

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

Supplier
AUX0000061
Category

Supplier Location
001
Unit of Measure

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

Requisition Settings

Business Unit

FSU01

*Requester

RBERG

*Currency

USD

Florida State University

Robert Berg

Requisition Name

Priority

Medium

[Line Defaults](#)

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

Supplier

AUX0000061

Supplier Location

001

Category

Unit of Measure

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.**

Requisition Settings

Business Unit: FSU01 (Florida State University)

*Requester: RBERG (Robert Berg)

*Currency: USD

Line Defaults ⓘ

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

Supplier: AUX0000061

Supplier Location: 001

Category: [Empty]

Unit of Measure: EA

Shipping Defaults

Ship To: SFAB220

Due Date: 06/30/2022

Attention: [Empty]

Add One Time Address

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).

Create Requisition ⓘ

Welcome Robert Berg

Home | My Preferences | Requisition Settings | 0 Lines | Checkout

Request Options

Enter search criteria or select from the menu on the right to begin creating your requisition.

Special Requests (Circled in red)
Create a non-catalog request

Favorites
Browse Favorite Items and Services

ePro Services
Request Services
Fixed Cost Service
Variable Cost Service
Time and Materials

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_CEFA” 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_CEFA0000001**.

Category Code	Description	Detail	Expense Account
AUX_CEFA0000001	CEFA - Economic Impact Analysis Svcs	Charges for economic impact and research services.	740245

- 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

CEFA - Economic Impact Analysis Svcs

*Price

100

*Currency

USD

*Quantity

1

*Unit of Measure

EA

*Category

AUX_CEFA0000001

Due Date

06/30/2022

Supplier

Supplier ID

AUX0000061

Supplier Name

Cntr for Economic Foreca:

Cntr for Economic Forecasting & Analysis

[Suggest New Supplier](#)

Manufacturer

Additional Information

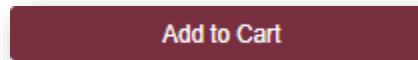
☐ Send to Supplier
 ☐ Show at Receipt
 ☐ Show at Voucher

Request New Item

A notification will be sent to a buyer regarding this new item request.

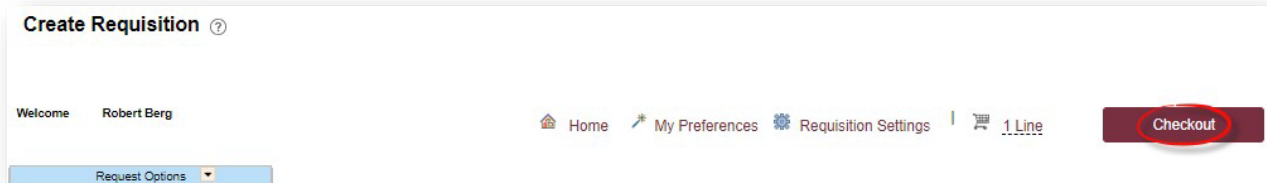
Add to Cart

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 Photo & Video services have been added & you are ready to check out, select "Checkout" at the top of the page:



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:

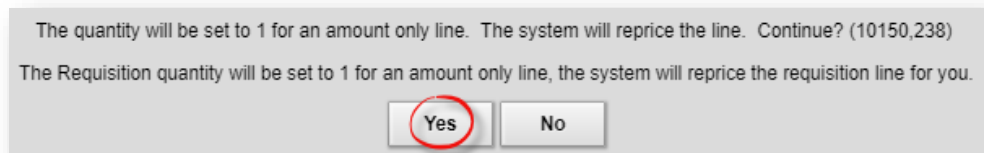
Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	CEFA - Economic Impact Analysis		Cntr for Economic Forecasting & Analysis	1	Each	100.00	100.00		Add	

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

A screenshot of the "Item Details" page. On the left, there are fields for "Merchandise Amount" (1.00 USD), "Item ID", "Category", "Original Substituted Item", "Description", and "Physical Nature" (Goods). The "Buyer" field is highlighted in yellow and contains "FSU_AUX_AUTOSOURCE_BUYER". On the right, there is a list of checkboxes: "RFQ Required", "Device Tracking", "Zero Price Indicator", "Stockless Item", "Amount Only" (which is checked and circled in red with an arrow pointing to it), and "Inspection Required". Below the Buyer field, there are links for "Buyer Information" and "Configuration Info".

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.

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	Details	Comments	Delete																
1	CEFA - Economic Impact Analysis		Cntr for Economic Forecasting & Analysis	1	Each	100.00000	100.00		Add																	
<p>Shipping Line 1</p> <p>*Ship To: SFAB220</p> <p>Address: FINE ARTS BLDG, 540 W CALL ST, TALLAHASSEE, FL 323061150</p> <p>Attention To: Robert Berg</p> <p>Due Date: 06/30/2022</p>																										
<p>Accounting Lines</p> <p>*Distribute By: Amt SpeedChart</p> <p>Accounting Lines</p> <p>Chartfields1 Chartfields2 Details Details 2 Asset Information Asset Information 2 Budget Information</p> <table border="1"> <thead> <tr> <th>Line</th> <th>Status</th> <th>Dist Type</th> <th>*Location</th> <th>Percent</th> <th>Merchandise Amt</th> <th>GL Unit</th> <th>Entry Event</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Open</td> <td></td> <td>SFAB220</td> <td>100.0000</td> <td>100.00</td> <td>FSU01</td> <td></td> </tr> </tbody> </table>											Line	Status	Dist Type	*Location	Percent	Merchandise Amt	GL Unit	Entry Event	1	Open		SFAB220	100.0000	100.00	FSU01	
Line	Status	Dist Type	*Location	Percent	Merchandise Amt	GL Unit	Entry Event																			
1	Open		SFAB220	100.0000	100.00	FSU01																				

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 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).

Dept	Fund	PC Bus Unit	Project	Activity	Source Type
196000 	110 				

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

18. When reviewed & ready to submit for approval, click **Save & 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 & will be dispatched to the vendor when the applicable system processes run throughout the day.