



OMNI Auxiliary AR/Billing: Dean of Students

Placing an Order

All orders are placed with the appropriate Director using the auxiliary's approved form. For more information, please visit the [Dean of Students 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: FSU01 Florida State University Requisition Name:

*Requester: RBERG Robert Berg Priority: Medium

*Currency: USD

Line Defaults

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

Supplier: Category:

Supplier Location: Unit of Measure:

Shipping Defaults

Ship To: SFAB220 Add One Time Address

Due Date: Attention:

Accounting Defaults

Chartfields1 Details Asset Information

Dist	Percent	Location	GL Unit	Dept	Fund	PC Bus Unit	Project	Activity	So
1	<input type="text"/>	SFAB220 <input type="text"/>	FSU01 <input type="text"/>	196000 <input type="text"/>	<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 **“AUX000039 | Dean of Students”**



Supplier Search

Supplier ID

Name

Short Supplier Name

Alternate Supp Name

City

Country State

Postal Code

Enter search criteria to find a supplier.

Search Results

Supplier ID	Supplier Name	Default Location	Default Location Description	Address	City	State
31 AUX0000034	FSU Athletics	001	Main	P.O. Box 2195	Tallahassee	FL
32 AUX0000035	Jim Moran Building	001	Main	111 South Monroe St	Tallahassee	FL
33 AUX0000036	WFSU Public Media	001	MAIN	1600 Red Barber Plaza	Tallahassee	FL
34 AUX0000037	Natl High Magnetic Field Lab	001	Main	Fiscal Office	Tallahassee	FL
35 AUX0000038	Psychology	001	Main	1107 W. Call Street	Tallahassee	FL
36 AUX0000039	Dean of Students	001	Main	University Center A, Suite 4100	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

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



Requisition Settings

Business Unit Florida State University Requisition Name

*Requester Robert Berg Priority

*Currency

Line Defaults

Supplier Category

Supplier Location Unit of Measure

- 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 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

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

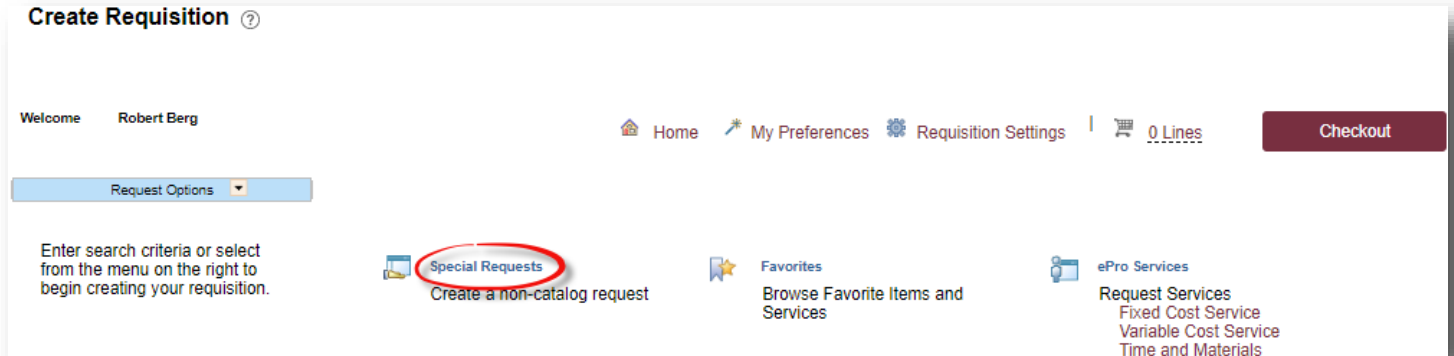
Warning -- date out of range. (15,9)

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.

- 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_DOS” 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_DOS0000001**.

Category Code	Description	Detail	Expense Account
AUX_DOS0000001	Dean of Students - Ads & Promotional Svcs	Charges for advertising and promotional services provided by Dean of Students.	740285

- 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

*Price *Currency

*Quantity *Unit of Measure

*Category *Due Date

Supplier

Supplier ID

Supplier Name Dean of Students

Supplier Item ID

Additional Information

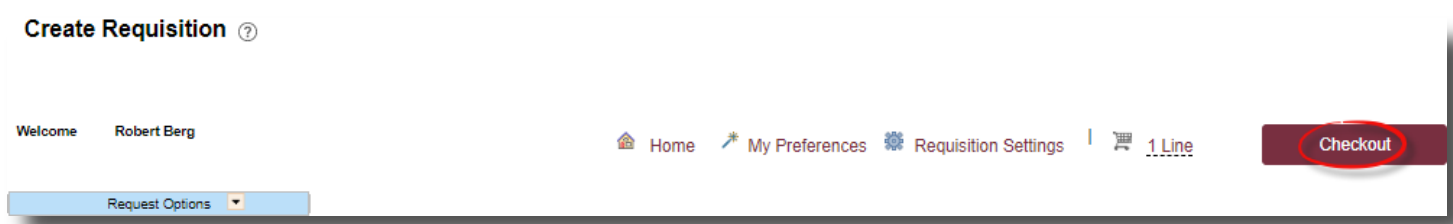
Send to Supplier Show at Receipt Show at Voucher

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



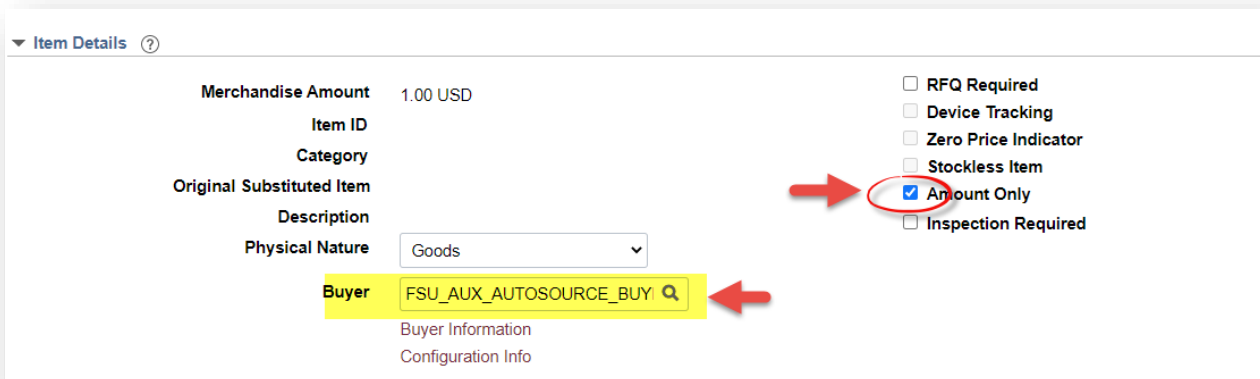
15. You will be returned to the **Checkout – Review & Submit** page.

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:

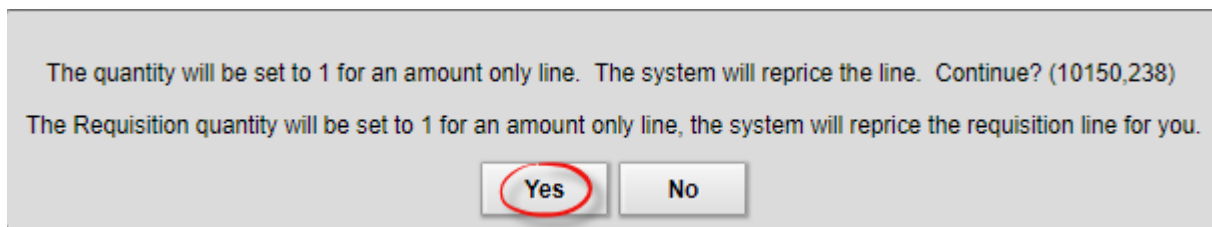
Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	Dean of Students - Ads & Promo		Dean of Students	1	Each	100.00	100.00		Add	

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



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
1	Dean of Students - Ads & Promo		Dean of Students	1	Each	100.00000	100.00

Shipping Line 1

*Ship To: SFAB220
 Address: FINE ARTS BLDG, 540 W CALL ST, TALLAHASSEE, FL 323061150
 Attention To: Robert Berg
 Due Date: 06/30/2020

*Distribute By: Amt SpeedChart

Accounting Lines

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 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).

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) & (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.