



## OMNI - Auxiliary AR / Billing - FSU Card

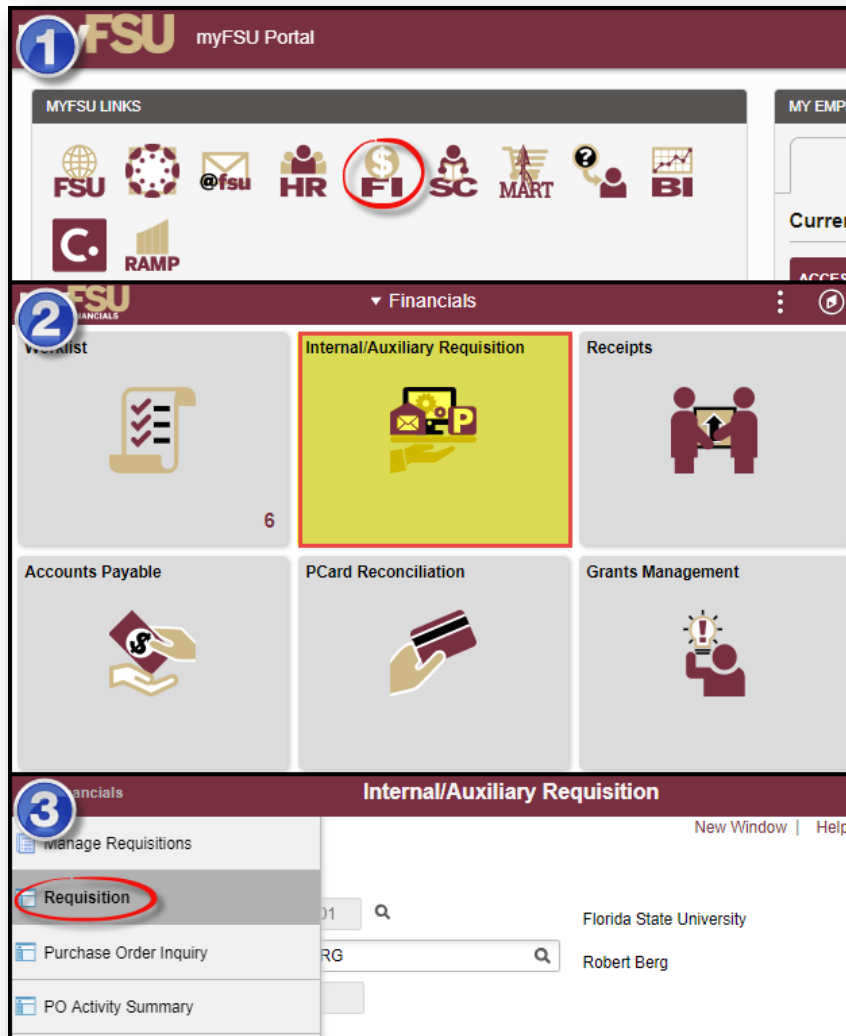
### Placing an Order

To place a departmental order with the FSU Card Center, utilize the information found on the [FSU Card Services 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 internal auxiliary open-ended 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. 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**

1-1 of 1

Dist	Percent	Location	GL Unit	Dept	Fund	PC Bus Unit	Project	Activity	Source T
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 and 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 “AUX000006 | FSU Card Center”

**Supplier Search**

Supplier ID

Name

Short Supplier Name

Alternate Supp Name

City

Country   State

Postal Code



Search Results

		Supplier ID	Supplier Name	Default Location	Default Location Description	Address	City	State	
<input type="radio"/>	1	AUX0000002	OBS Copy Program	001	Main	Florida State University	Tallahassee	FL	
<input type="radio"/>	2	AUX0000003	OBS Postal Services	001	Main	Florida State University	Tallahassee	FL	
<input checked="" type="radio"/>	3	AUX0000006	FSU Card Center	001	Main	Florida State University	Tallahassee	FL	
<input type="radio"/>	4	AUX0000007	Parking and Transportation	001	Main	Florida State University	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

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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

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Line Defaults [?](#)

Supplier  Category

Supplier Location  Unit of Measure



- 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 **Requisition Name**

\*Requester: RBERG  Robert Berg **Priority**

\*Currency: USD

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**Line Defaults** [?](#)

Supplier: AUX0000006  **Category**

Supplier Location: 001  **Unit of Measure**: EA

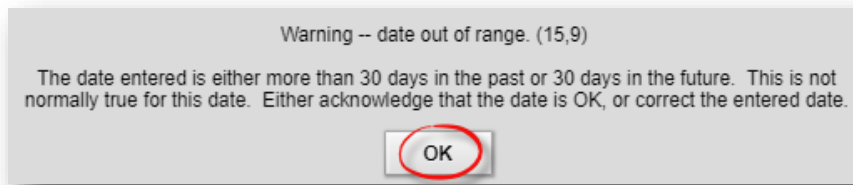
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**Shipping Defaults**

Ship To: SFAB220  [Add One Time Address](#)

Due Date: 06/30/2019  **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 page.
- 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**  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\_CARD” 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\_CARD0000001**.

Category Code	Description	Expense Account
AUX_CARD0000001	FSU Card Services	740309

- 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: FSU Card Services

\*Price: 100      \*Currency: USD

\*Quantity: 1      \*Unit of Measure: EA

\*Category: AUX\_CARD0000001      Due Date: 06/30/2019

**Supplier**

Supplier ID: AUX0000006      FSU Card Center

Supplier Name: FSU Card Center      Suggest New Supplier

Supplier Item ID: [Empty]

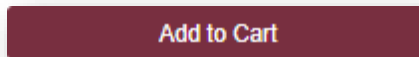
**Additional Information**

[Empty text area]

Send to Supplier     Show at Receipt     Show at Voucher

**Add to Cart**

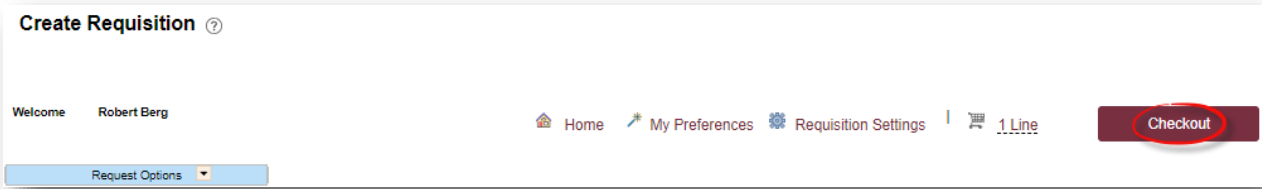
12. When ready, select “Add to Cart” at the bottom of the page.





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 combinations in the same category code.

14. When you are ready to check out, select “Checkout” at the top of the page:



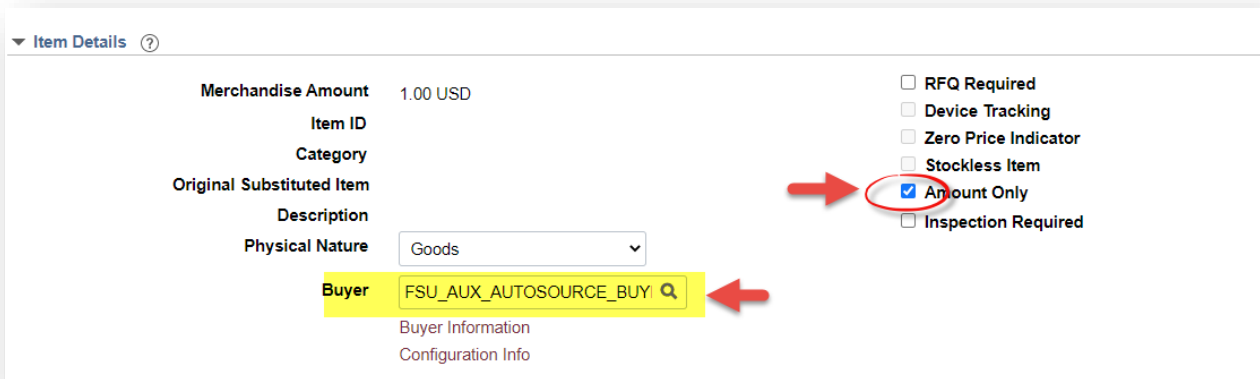
15. You will be returned to the **Checkout – Review and Submit** page.

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 in the “Details” column for the line:

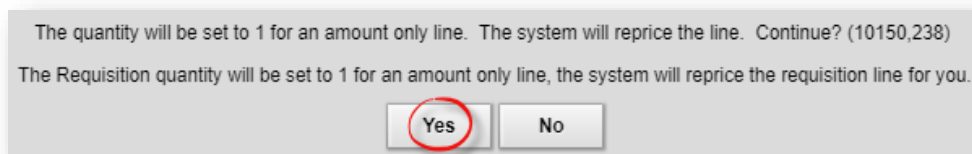
Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	FSU Card Services		FSU Card Center	1.0000	Each	100.0000	100.00		Add	

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 and 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 – d for all lines.



- 17. Enter your accounting information e.g. department ID, fund, project, etc., as shown below:
  - a. Expand the lines using the small grey arrows & select the “Chartfields2” tab:

The screenshot shows the 'Requisition Lines' interface. At the top, a table lists requisition lines with columns: Line, Description, Item ID, Supplier, Quantity, UOM, Price, Total, and Details. Line 1 is 'FSU Card Services' with a quantity of 1.0000 and a price of 100.00000. Below this, the 'Shipping Line' section is expanded, showing details for 'SFAB220' including address (FINE ARTS BLDG, 540 W CALL ST, TALLAHASSEE, FL 323061150), attention to (Robert Berg), and due date (06/30/2019). The 'Accounting Lines' section is also expanded, showing a dropdown for '\*Distribute By' set to 'Amt' and a 'SpeedChart' search field. At the bottom, the 'Accounting Lines' table is visible with tabs for 'Chartfields1', 'Chartfields2', 'Details', 'Details 2', 'Asset Information', 'Asset Information 2', and 'Budget Information'. The 'Chartfields2' tab is selected, showing a table with columns: Dept, Fund, PC Bus Unit, Project, Activity, and Source Type.

- b. Enter the appropriate department ID, fund and project combination in the Chartfields2 tab.
  - i. **NOTE: A project must be on its own requisition. A requisition can not include multiple projects or a project and multiple non-project funds.**
  - ii. A requisition can include multiple non-project combinations (including optional chartfields).

Dept	Fund	PC Bus Unit	Project	Activity	Source Type
196000	110				

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

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

The screenshot shows the bottom of the requisition page with a 'Check Budget' header. Below the header are four buttons: 'Save & submit' (circled in red), 'Save for Later', 'Add More Items', and 'Preview Approvals'.

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.