



# OMNI Auxiliary AR/Billing: Institute of Molecular Biophysics

## Placing an Order

All new orders are placed with the appropriate Lab manager using the auxiliary's approved form. For more information, please visit the [Institute of Molecular Biophysics 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:







Search Results

|                                  |    | Supplier ID | Supplier Name                     | Default Location | Default Location Description | Address              | City        | State |  |
|----------------------------------|----|-------------|-----------------------------------|------------------|------------------------------|----------------------|-------------|-------|--|
| <input type="radio"/>            | 11 | AUX0000014  | Chemistry Labs                    | 001              | Main                         | 118 Dittmer Building | Tallahassee | FL    |  |
| <input type="radio"/>            | 12 | AUX0000015  | Biology Stockroom                 | 001              | Main                         | 319 Stadium Dr       | Tallahassee | FL    |  |
| <input type="radio"/>            | 13 | AUX0000016  | Biology CORE Labs                 | 001              | Main                         | 319 Stadium Dr       | Tallahassee | FL    |  |
| <input type="radio"/>            | 14 | AUX0000017  | Biology BSIR Facility             | 001              | Main                         | 319 Stadium Dr       | Tallahassee | FL    |  |
| <input type="radio"/>            | 15 | AUX0000018  | Biology Greenhouse                | 001              | Main                         | 319 Stadium Dr       | Tallahassee | FL    |  |
| <input type="radio"/>            | 16 | AUX0000019  | Ctr for Genomics&Pers Med Aux     | 001              | Main                         | 319 Stadium Drive    | Tallahassee | FL    |  |
| <input type="radio"/>            | 17 | AUX0000020  | College of Medicine-MRI Facility  | 001              | Main                         | 1115 W. Call St      | Tallahassee | FL    |  |
| <input type="radio"/>            | 18 | AUX0000021  | Photo and Video Services          | 001              | Main                         | 222 S Copeland St.   | Tallahassee | FL    |  |
| <input type="radio"/>            | 19 | AUX0000022  | HR Background Checks              | 001              | Main                         | 282 Champion's Way   | Tallahassee | FL    |  |
| <input checked="" type="radio"/> | 20 | AUX0000023  | Institute of Molecular Biophysics | 001              | Main                         | 91 Chieftan Way      | 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:

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Line Defaults

Supplier: AUX0000023

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

\*Requester: RBERG  Robert Berg

\*Currency: USD

Requisition Name:

Priority:

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Line Defaults

Supplier: AUX0000023

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

Requisition Name:

Priority:

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**Line Defaults**

Supplier: AUX0000023  Category:

Supplier Location: 001  Unit of Measure: EA

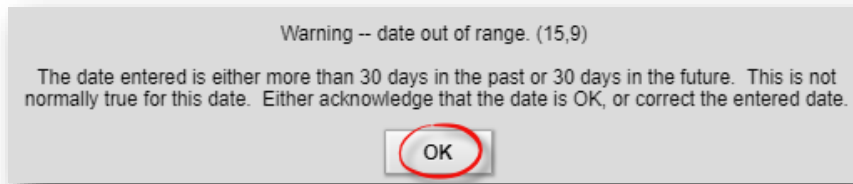
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**Shipping Defaults**

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 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\_IMB” 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\_IMB0000001**.

| Category Code  | Description                  | Detail  | Expense Account |
|----------------|------------------------------|---|-----------------|
| AUX_IMB0000001 | Research & Analysis Services | Institute of Molecular Biology departmental charges for scientific research & analysis Core Labs (XRAY, PBF, PEF) | 740206          |

- 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:   Institute of Molecular Biophysics Suggest New Supplier

Supplier Item ID:

**Additional Information**

Send to Supplier     
  Show at Receipt     
  Show at Voucher

Add to Cart

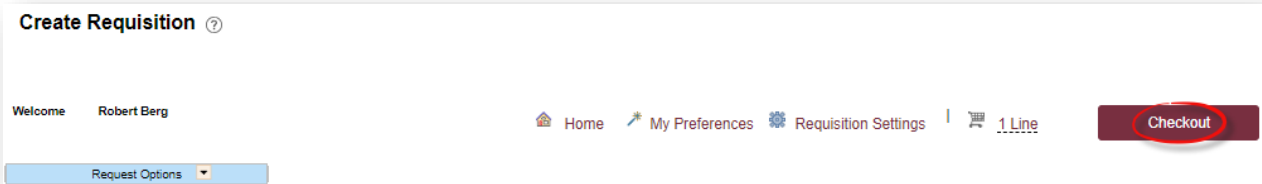


12. When ready, select “Add to Cart” at the bottom of the page.



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 combos in the same category code.

14. When lines for all applicable IMB services have been added & you are ready to check out, select “Checkout” at the top of the page:



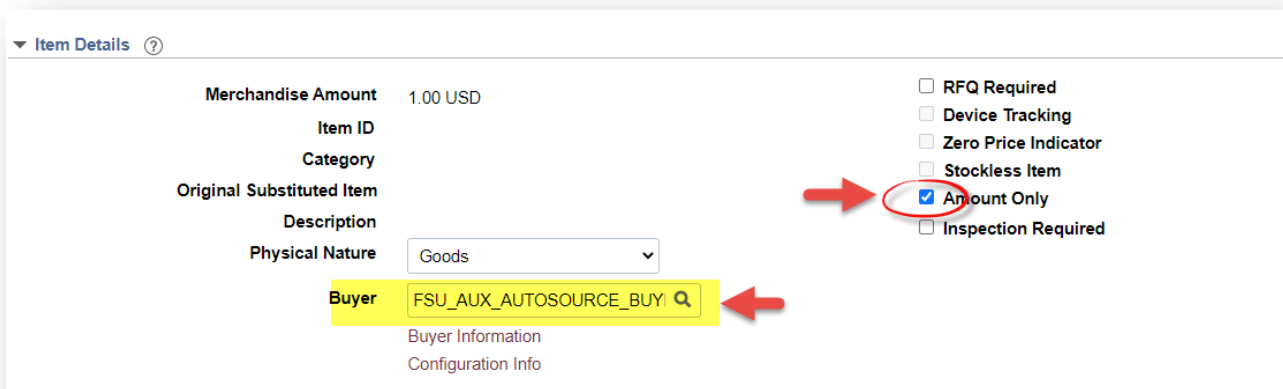
15. You will be returned to the **Checkout – Review & Submit** page.

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    | IMB Research & Analysis Svcs |         | Institute of Molecular Biophysics | 1.0000   | Each | 200.0000 | 200.00 |         | Add      |        |

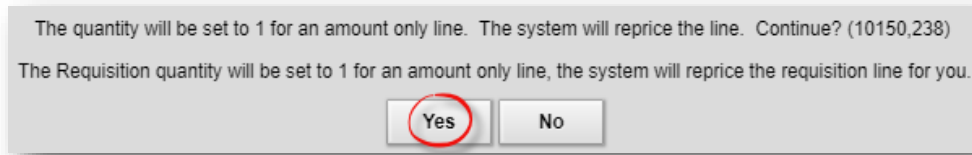
b. On the “Line Details” page, select the checkbox for “Amount Only”. Additionally, the Buyer field **MUST** remain as “FSU\_AUX\_AUTOSOURCE\_BUYER.”



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    | Details |
|------------------|------------------------------|---|--|----------------------|---------------------|--------------------|----------|---------|
| 1                | IMB Research & Analysis Svcs |   | Institute of Molecular Biophysics                            | 1.0000               | Each                | 200.00000          | 200.00   |         |
| Shipping Line 1  |                              | *Ship To  | SFAB220  | Add Shipto Comments  |                     | Quantity           | 1.0000   |         |
|                  |                              | Address   | FINE ARTS BLDG<br>540 W CALL ST<br>TALLAHASSEE, FL 323061150 | Add One Time Address |                     | Price              | 200.0000 |         |
|                  |                              | Attention To  | Robert Berg  |                      |                     |                    |          |         |
|                  |                              | Due Date  | 06/30/2019   |                      |                     |                    |          |         |
|                  |                              | Ship Via  | BEST_WAY   |                      |                     |                    |          |         |
|                  |                              | Freight Terms   | DEST1  |                      |                     |                    |          |         |
| Accounting Lines |                              | *Distribute By  | Amt  | SpeedChart           |                     |                    |          |         |
| Accounting Lines |                              | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> |  |                      |                     |                    |          |         |
| Chartfields1     | <b>Chartfields2</b>          | Details   | Details 2  | Asset Information    | Asset Information 2 | Budget Information |          |         |
| Dept             | Fund                         | PC Bus Unit   | Project  | Activity             | Source Type         |                    |          |         |

- 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.**

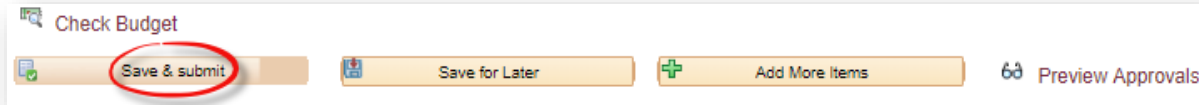
- ii. A requisition can include multiple non-project combinations (including optional chart fields).

| Dept   | Fund | PC Bus Unit | Project | Activity | Source Type |
|--------|------|-------------|---------|----------|-------------|
| 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:



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.