OMNI Auxiliary AR/Billing: ITS

Placing an Order

All new orders are placed through the ITS Technology Service Request Form. 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 ITS.**

Are you changing your funding with ITS?

If you are working with ITS and have to change funding on existing services, please be sure to submit a new ITS TSR form located here. If assistance is needed in placing the service order (TSR), please refer to the guidance located on the ITS Service Desk website.

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. 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:

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3. You will land on the **Requisition Settings** page. Click the magnifying glass to the right of the "Supplier" field to look up your supplier.

4. 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.

   a. You must enter a supplier that begins with AUX. For this requisition, the appropriate supplier is "**AUX0000009 | FSU Information Technology Services**"

Search Results

		Supplier ID	Supplier Name	Default Location	Default Location Description	Address	City	State
○	1	AUX0000002	OBS Copy Program	001	Main	Florida State University	Tallahassee	FL
○	2	AUX0000003	OBS Postal Services	001	Main	Florida State University	Tallahassee	FL
○	3	AUX0000006	FSU Card Center	001	Main	Florida State University	Tallahassee	FL
○	4	AUX0000007	Parking and Transportation	001	Main	Florida State University	Tallahassee	FL
○	5	AUX0000008	Warehouse	001	Main	Florida State University	Tallahassee	FL
○	6	AUX0000009	FSU Information Technology Service	001	MAIN	296 Champions Way	Tallahassee	FL
○	7	AUX0000010	College of Music Performance Halls	001	Main	PO BOX 3061180	Tallahassee	FL
○	8	AUX0000011	College of Medicine Stockroom	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   Requisition Name

*Requester RBERG   Robert Berg   Priority

*Currency USD

Line Defaults ⓘ

Supplier AUX0000009   Category

Supplier Location 001   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

*Currency USD

Line Defaults ⓘ

Supplier AUX0000009   Category

Supplier Location 001   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.**

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).

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_ITS**" 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 ITS PO's, choose from the following Category Codes as shown below:

Category Code	Description	Detail	Expense Account
AUX_ITS0000001	Prof IT Services	Desktop support & ITS Assessments	740252
AUX_ITS0000002	File Storage / Virtual Computing		740252
AUX_ITS0000003	Local Service - Phone & Cable	Local Phone (Centrex & VoIP) & cable	740703
AUX_ITS0000005	Campus Access & Security Services	CASS	740703
AUX_ITS0000006	Data Circuits		740704
AUX_ITS0000007	Telecom Non-Recurring	Work orders, repairs, 1x charges, material & labor	740710
AUX_ITS0000008	Research Computing		740713
AUX_ITS0000009	Cellular Services		740730
AUX_ITS0000010	Managed Port Fees		740741
AUX_ITS0000011	Software Licensing		741145
AUX_ITS0000012	Admin Allocation	For ITS internal use only	740211
AUX_FAC0000001	*CIP FACILITIES*	*FOR FACILITIES DESIGN & CONSTRUCTION ONLY*	*780001*

    d. If needed, add notes in the "Additional Information" field. This will be for your research purposes only.
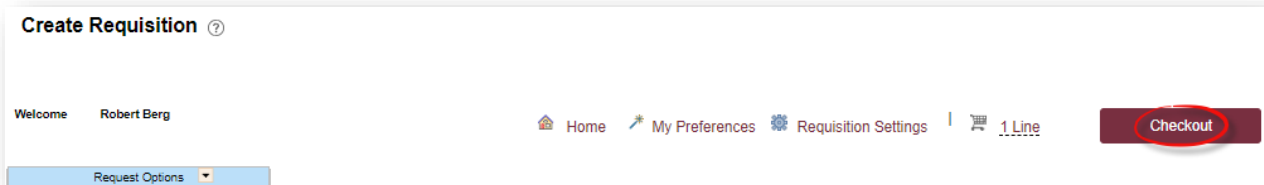
12. When ready, select "Add to Cart" at the bottom of the page.

Add to Cart

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 lines for all applicable ITS services have been added & you are ready to check out, select "Checkout" at the top of the page:

Create Requisition ⑦

Welcome   Robert Berg   🏠 Home   ✳ My Preferences   ⚙ Requisition Settings | 🛒 1 Line   **Checkout**

Request Options ▾

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:

Requisition Lines ⑦

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
▸ ☐ 1	Local Service - Phone & Cable		FSU Information Technology Service	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."

▾ **Item Details** ⑦

Merchandise Amount	1.00 USD	☐ RFQ Required
Item ID		☐ Device Tracking
Category		☐ Zero Price Indicator
Original Substituted Item		☐ Stockless Item
Description		☑ Amount Only
Physical Nature	Goods ▾	☐ Inspection Required
Buyer	FSU_AUX_AUTOSOURCE_BUYI 🔍	
	Buyer Information	
	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".

> 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 e.g. department ID, fund, project, etc., as shown below:

a. Expand the lines using the small grey arrows & then select the "Chartfields2" tab:

b. Enter the appropriate department ID, fund & 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 & 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.**

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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.