



# OMNI Auxiliary AR/Billing: Center for Academic & Professional Development (CAPD)

## Placing an Order

All orders are placed with the appropriate Director using the auxiliary’s approved form. For more information, please visit the [CAPD 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   Florida State University Requisition Name

\*Requester   Robert Berg Priority  ▼

\*Currency

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

Supplier   Category

Supplier Location   Unit of Measure

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Shipping Defaults

Ship To   Add One Time Address

Due Date   Attention

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Accounting Defaults

Dist	Percent	Location	GL Unit	Dept	Fund	PC Bus Unit	Project	Activity	So
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 & 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 **“AUX000065 | Center for Academic & Professional Dev”**

**Supplier Search**

Supplier ID

Name

Short Supplier Name

Alternate Supp Name

City

Country   State

Postal Code

Enter search criteria to find a supplier.



### Supplier Search

Supplier ID    
Name    
Short Supplier Name   
Alternate Supp Name   
City   
Country   State   
Postal Code

### Search Results

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	Supplier ID	Supplier Name	Default Location	Default Location Description	Address	City	State	
<input checked="" type="radio"/>	41 AUX0000044	Oglesby Union	001	MAIN	75 N WOODWARD AVE	TALLAHASSEE	FL	<input type="button" value="Q"/>
<input type="radio"/>	42 AUX0000045	Ringling Center for the Arts	001	MAIN	2700 N TAMiami TRL	SARASOTA	FL	<input type="button" value="Q"/>
<input type="radio"/>	43 AUX0000046	FCIM - Florida Ctr for Interactive Media	001	MAIN	2010 LEVY AVE	TALLAHASSEE	FL	<input type="button" value="Q"/>

5. The system will bring you back to the **Requisition Settings** page with the supplier information included.

### Requisition Settings

Business Unit   Florida State University  
\*Requester   Robert Berg  
\*Currency

Requisition Name   
Priority

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Line Defaults

Supplier    
Supplier Location    
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: AUX0000044

Supplier Location: 001

Category:

Unit of Measure: EA

- Enter a due date. **For year-long, open ended POs 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: AUX0000044

Supplier Location: 001

Category:

Unit of Measure: EA

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**Shipping Defaults**

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

Due Date: 06/30/2020

Attention:

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

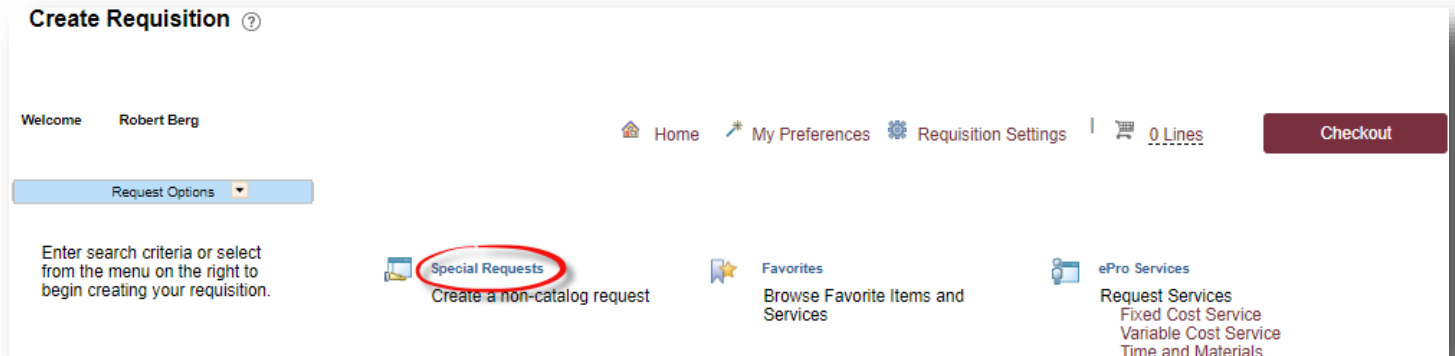
Warning -- date out of range. (15,9)

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\_UNION” 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 one of the Category Codes as shown below:

Category Code	Description	Detail	Expense Account
AUX_UNION0000001	Oglesby Union - Space Rental	Charges for space rental and related fees from the Union. Includes recurring charges and one-time charges for space at Campus Events, Market, Crenshaw Lanes, Oglesby Union Art Center, Askew Student Life Center, etc.	741741
AUX_UNION0000002	Oglesby Union - Ads and Promotional Svcs	Charges for ads and promotional services provided by SLB Films and the Union Art Center.	740285
AUX_UNION0000003	Oglesby Union - Art Center Supplies	Charges for Art Center goods that are not intended for resale. Includes Framing, Paint-A-Pot, and related goods.	741420
AUX_UNION0000004	Oglesby Union - Union Resale	Union merchandise, including Art Center goods purchased for resale.	741009
AUX_UNION0000005	Oglesby Union - ASLC Films Screening	Charges for performance rights for film screenings at the Askew Student Life Center.	741165
AUX_UNION0000006	Oglesby Union - Food & Beverage	Not allowable on most funds. Charges for food and beverage purchased from the Union, including the Askew Student Life Center.	741301
AUX_UNION0000007	Oglesby Union - Janitorial Services	Ongoing contracted janitorial services from the Union	740262



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: Space Rental

\*Price: 500.00

\*Quantity: 1

\*Category: AUX\_UNION0000001

\*Currency: USD

\*Unit of Measure: EA

Due Date: 06/30/2020

**Supplier**

Supplier ID: AUX0000044

Supplier Name: Oglesby Union

Supplier Item ID: [Empty]

Oglesby Union      Suggest New Supplier

**Additional Information**

[Empty text area]

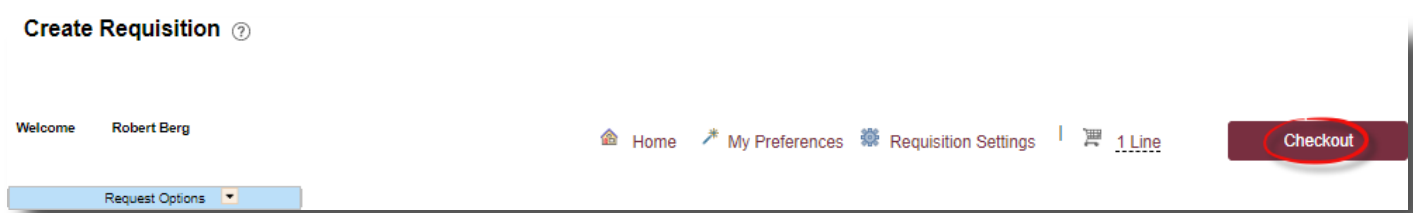
Send to Supplier       Show at Receipt       Show at Voucher

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



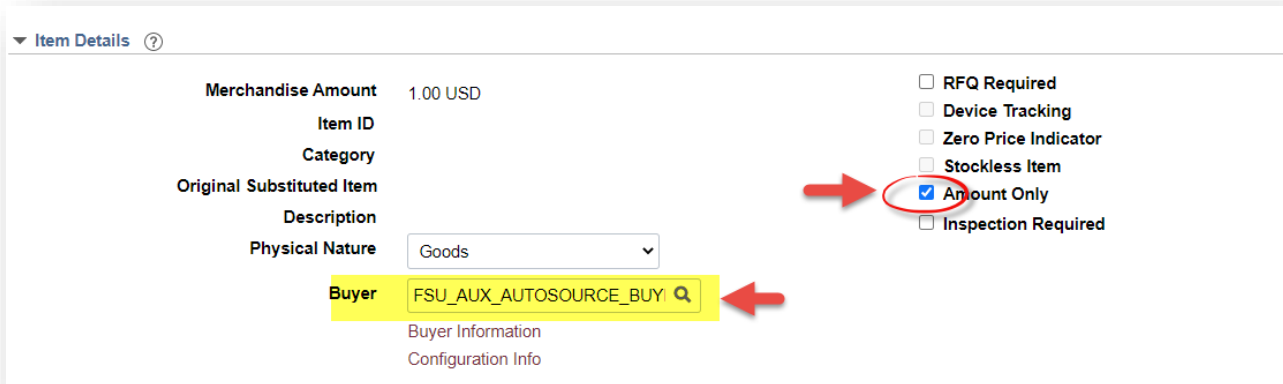
15. You will be returned to the **Checkout – Review & Submit** page.

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:

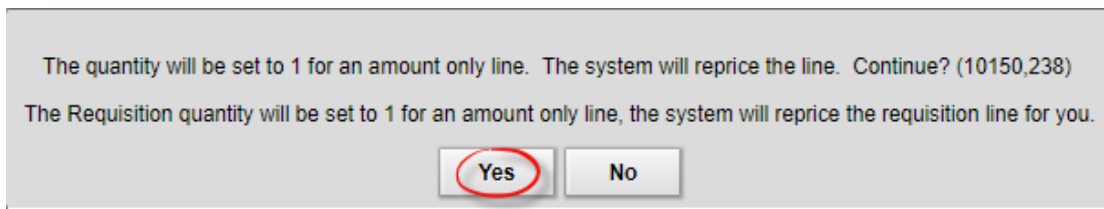
Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	Space Rental		Oglesby Union	1	Each	500.00000	500.00		Add	

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	Space Rental		Oglesby Union	1	Each	500.00000	500.00
Shipping Line 1		*Ship To	SFAB220	Add Shipto Comments		Quantity	1
		Address	FINE ARTS BLDG 540 W CALL ST TALLAHASSEE, FL 323061150	Add One Time Address		Price	500.00
		Attention To	Robert Berg				
		Due Date	06/30/2020				
Accounting Lines							
		*Distribute By	Amt	SpeedChart			
Accounting Lines							
<span>Chartfields1</span> <span style="background-color: yellow;">Chartfields2</span> <span>Details</span> <span>Details 2</span> <span>Asset Information</span> <span>Asset Information 2</span> <span>Budget Information</span>							

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 cannot 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
301212	320			

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.