

## OMNI - Auxiliary AR / Billing - Warehouse Rental

### 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 find your supplier.

### Requisition Settings

Business Unit:   Florida State University

\*Requester:   Robert Berg

\*Currency:

Requisition Name:

Priority:  ▼

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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**

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[Chartfields1](#) | [Details](#) | [Asset Information](#) |

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"/>				

- 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 **"AUX000008 | Warehouse"**

### 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	
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	
9	AUX0000012	College of Medicine Labs	001	Main	1115 W. Call St.	Tallahassee	FL	
10	AUX0000013	Chemistry Stockroom	001	Main	118 Dittmer Building	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: AUX0000008 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

\*Requester: RBERG Robert Berg

\*Currency: USD

Requisition Name: \_\_\_\_\_

Priority: \_\_\_\_\_

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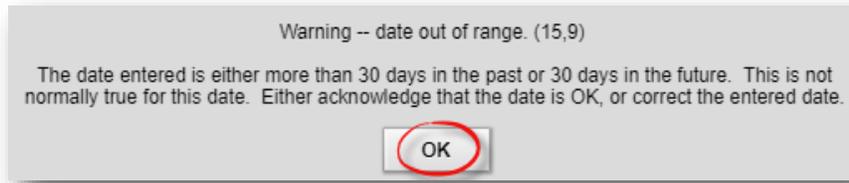
Line Defaults

Supplier: AUX0000008 Category: \_\_\_\_\_

Supplier Location: 001 Unit of Measure: EA

- 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.

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



- Select "OK" at the bottom of the page.
- 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\_WARE” 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\_WARE000001**.

Category Code	Description	Expense Account
AUX_WARE000001	Warehouse Rental	741741

- 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**

<b>*Item Description</b>	Warehouse Rental		
<b>*Price</b>	100	<b>*Currency</b>	USD
<b>*Quantity</b>	1	<b>*Unit of Measure</b>	EA <span style="float: right;">Q</span>
<b>*Category</b>	AUX_WARE000001 <span style="float: right;">Q</span>	<b>Due Date</b>	06/30/2019 <span style="float: right;">📅</span>

**Supplier**

<b>Supplier ID</b>	AUX0000008 <span style="float: right;">Q</span>	
<b>Supplier Name</b>	Warehouse <span style="float: right;">Q</span>	Suggest New Supplier
<b>Supplier Item ID</b>		

**Additional Information**

Send to Supplier    
  Show at Receipt    
  Show at Voucher

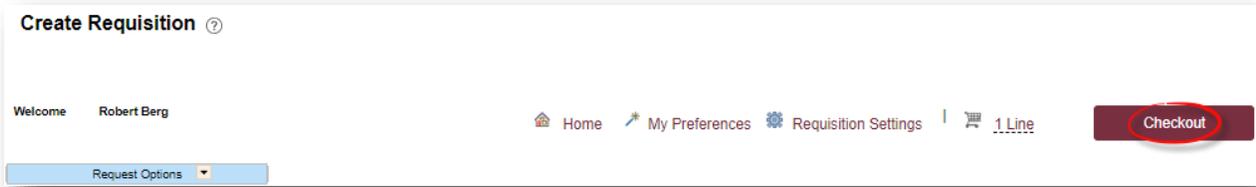
Add to Cart

12. When you are 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 all lines have been added and you are ready to check out, select "Checkout" at the top of the page:



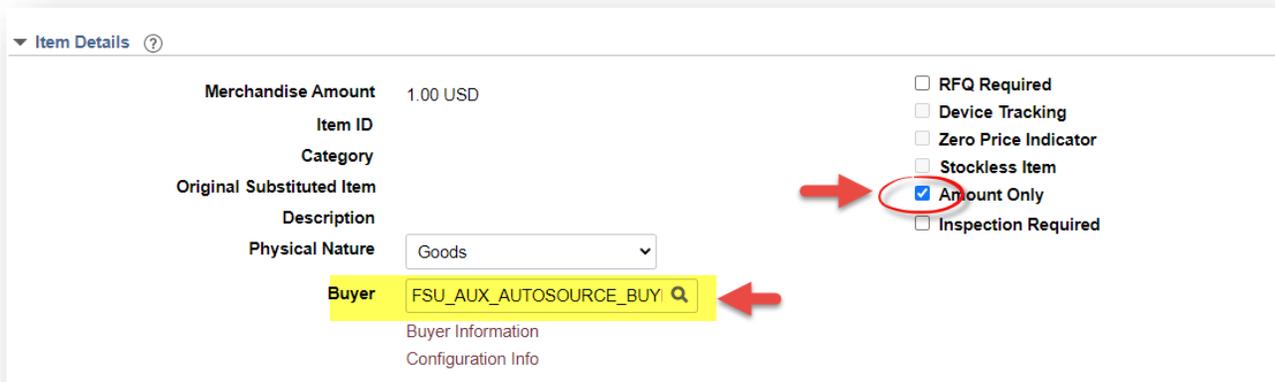
15. You will be returned to the **Checkout - Review and Submit** page.

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	Warehouse Rental		Warehouse	1,0000	Each	100.0000	100.00		Add	

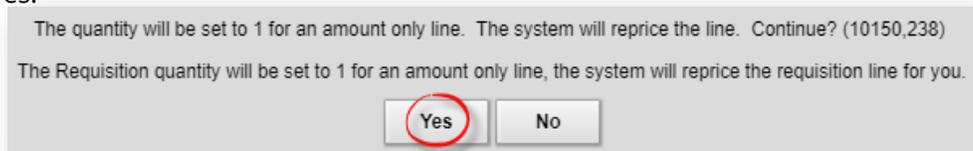
a. On the "Line Details" page, select the checkbox for "Amount Only." Additionally, the Buyer field **MUST** remain as "FSU\_AUX\_AUTOSOURCE\_BUYER."



b.

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) 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 as shown below and then select the "Chartfields2" tab

Requisition Lines ?

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details
1	Warehouse Rental		Warehouse	1.0000	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: 06/30/2019

Accounting Lines

\*Distribute By: Amt SpeedChart

Accounting Lines

Chartfields1 | **Chartfields2** | 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 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.

18. When reviewed and ready to submit for approval, click **Save and 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.