

From Requisition to Property

Overview

This information should help you to better make decisions on how to enter your requisitions in a format so that they will receive Property Tags without additional paperwork.

Background Information

In this section, any applicable background information will be provided. Perhaps you could include a reference to any job aids that might be relevant as "prerequisites" for this job aid or a link to any internal policy and/or procedure guides.

New Terminology

Analysis Types - Analysis Types are assigned to individual resource/transaction rows to identify the different types of transactions in your system. The system assigns this analysis type based on what transaction is being performed in the system (i.e. - COM is assigned to POs coming from Purchasing).

Transactions - In OMNI 8.4, transactions on projects were called "Project Resources" these transactions are now referred to as "Project Transactions"

Purpose

This section would include any appropriate purpose statement. However, purpose may be covered in Overview and/or Background Information.

Procedure

This section would explain the procedure. A brief background is optional - otherwise, you can dive right into:

Navigation

Grants > Awards > Project Budget



Step 1

Here you might explain what key values and/or concepts are associated with the screenshot.

Input:

Business Unit: **FSU01**

Project: **<Your Project Number>**

Click: **Search**

Select your project number from the list provided.

Step 2

I think that on the next shots, the menu navigation could potentially be hidden without interfering since there is no new left hand navigation.

Review:

Project: **<Your Project Number>**

Department: **<Your Department Number>**

Click: **Project Detail** Subtab

Review: Project Chartfields

Department	Fund Code	Activity	Analysis Type	Source Type	Category	Subcategory	Account	Budget Reference
227000	520		BUD	DIRCT	DIRCT		700001	
227000	520	1	BUD	DIRCT	DIRCT		700001	
227000	520	1	BUD	EXPNS	TRAVL		700001	
227000	520	1	BUD	EXPNS	TUITN		700001	
227000	520	1	BUD	EXPNS	PRFSV		700001	
227000	520	1	BUD	PERSN	SALRY		700001	



These steps can be copied as many times as is required to complete the steps for this navigation. At that point, the navigation link can be copied and new steps added. Once all steps are complete, the following sections can be inserted as needed.

Tips to Keep In Mind

Here any "Tips" and/or related queries could be referenced.

How to Code a Ticket

Issue Area: Sponsored Research

Issue Type: Budget

Issue Category: Posting Error

Fields Required: Project Number, Department ID, Fund Code, Resource Type, Resource Category

More Information

More information can be found on the Sponsored Research Website at: www.research.fsu.edu. Click on the link for training, and see the related job aids, policies and procedures, and staff contact information. Questions should be directed to your sponsored research accountant or Roberta McManus at 850-644-1234.



Options

Copy From: Hold From Further Processing

Header

'PO Date: Vendor Search Doc Tol Status: Valid

Vendor: [Vendor Details](#) Backorder Status: None [Create BackOrder](#)

'Vendor ID: MICRO COMPUTER FORMS Receipt Status: Received

'Buyer: SULLIVAN, PHYLLIS 'Dispatch Method:

PO Reference:

[Header Details](#) [PO Activities](#) [Add ShipTo Comments](#)

[PO Defaults](#) [Document Status](#)

[Edit Comments](#) [Requisitions](#)

Amount Summary

Merchandise: 1500.00

Freight/Tax/Misc.: 0.00

Total Amount: 1500.00 USD

Add Items From Select Lines To Display

[Purchasing Kit](#) [Catalog](#) [Item Search](#) Line: To:

Lines								Customize	Find	View All	First
Details	Ship To/Due Date	Statuses	Item Information	Attributes	RFQ	Contract	Receiving				
Line	Item	Description		PO Qty	'UOM	Category	Price	Amount	Status		
1		computer monitor		<input type="text" value="2.0000"/>	EA	<input type="text" value="432100"/>	<input type="text" value="300.00000"/>	600.00	Active		
2		keyboard		<input type="text" value="1.0000"/>	EA	<input type="text" value="432100"/>	<input type="text" value="200.00000"/>	200.00	Active		
3		CPU		<input type="text" value="1.0000"/>	EA	<input type="text" value="432100"/>	<input type="text" value="500.00000"/>	500.00	Active		
4		mouse		<input type="text" value="1.0000"/>	EA	<input type="text" value="432100"/>	<input type="text" value="100.00000"/>	100.00	Active		
5		extra memory		<input type="text" value="1.0000"/>	EA	<input type="text" value="432100"/>	<input type="text" value="100.00000"/>	100.00	Active		

[View Printable Version](#)

'Go to:

This PO will receive one Property Tag



Unit: FSU01
 PO ID: 0000211044
 Copy From:

PO Status: Dispatched ▲ ✖
 Budget Status: Valid
 Hold From Further Processing

▼ Header

'PO Date: 10/24/2006 Vendor Search
 Vendor: BOUNDTREEM-00 [Vendor Details](#)
 'Vendor ID: 0000000003 BOUND TREE MEDICAL
 'Buyer: HEV9895 VALERUS, HERICA
 PO Reference:

Doc Tol Status: Valid
 Backorder Status: None [Create BackOrder](#)
 Receipt Status: Received
 'Dispatch Method: Phone [Dispatch](#)

[Header Details](#) [PO Activities](#) [Add ShipTo Comments](#)
[PO Defaults](#) [Document Status](#)
[Edit Comments](#) [Requisitions](#)

Amount Summary
 Merchandise: 3610.00
 Freight/Tax/Misc.: 0.00 [Calculate](#)
 Total Amount: 3610.00 USD

Add Items From Select Lines To Display

[Purchasing Kit](#) [Catalog](#) [Item Search](#) Line: To: [Retrieve](#)

Lines								Customize	Find	View All	Firs
Details	Ship To/Due Date	Statuses	Item Information	Attributes	RFQ	Contract	Receiving				
Line	Item	Description		PO Qty	'UOM	Category	Price	Amount	Status		
1		XRAY MACHINE		1.0000	EA	411000	1,200.00000	1,200.00	Active		
2		LAB REFRIGERATOR		1.0000	EA	411030	1,400.00000	1,400.00	Active		
3		MICROSCOPE		1.0000	EA	411200	1,010.00000	1,010.00	Active		

EACH LIINE OF THIS PO WILL GET A SEPERATE PROPERTY TAG.
 This is the preferred scenerio just needs to run in the batch no consolidation or unitization necessary.



Header

'PO Date: 10/24/2006 Vendor Search Doc Tol Status: Valid
 Vendor: EXECUOFFIC-002 Vendor Details Backorder Status: None Create BackOrder
 'Vendor ID: 0000002686 EXECUTIVE OFFICE FURNITURE Receipt Status: Received
 'Buyer: JCORDELL CORDELL, MYRTICE 'Dispatch Method: Phone Dispatch
 PO Reference:

[Header Details](#) [PO Activities](#) [Add ShipTo Comments](#)
[PO Defaults](#) [Document Status](#)
[Edit Comments](#) [Requisitions](#)

Amount Summary

Merchandise: 3450.00
 Freight/Tax/Misc.: 0.00 Calculate
 Total Amount: 3450.00 USD

Add Items From **Select Lines To Display**

[Purchasing Kit](#) [Catalog](#) [Item Search](#) Line: To: Retrieve

Lines								Customize	Find	View All	First
Details	Ship To/Due Date	Statuses	Item Information	Attributes	RFQ	Contract	Receiving				
Line	Item	Description	PO Qty	'UOM	Category	Price	Amount	Status			
1		DESK KEYBOARD TRAY	3.0000	EA	440000	150.00000	450.00	Active			
2		3 DRAWER DESK	3.0000	EA	440000	500.00000	1,500.00	Active			
3		ATTACHABLE CREDENZA	3.0000	EA	440000	250.00000	750.00	Active			
4		OVERHEAD SHELVING UNIT	3.0000	EA	440000	250.00000	750.00	Active			

[View Printable Version](#)

'Go to:

THIS PO WILL EQUAL THREE COMPLETE DESKS ONE ITEM FROM EACH LINE.
 consolidate into 2 and then unitize into 2.

Header

'PO Date: 10/24/2006 Vendor Search
 Vendor: COMPUTERS4-001 [Vendor Details](#)
 'Vendor ID: 0000013528 COMPUTERS4SURE
 'Buyer: JCORDELL CORDELL, MYRTICE
 PO Reference:

Doc Tol Status: Valid
 Backorder Status: None [Create BackOrder](#)
 Receipt Status: Received
 'Dispatch Method: Phone

Amount Summary

Merchandise: 2800.00
 Freight/Tax/Misc.: 0.00
 Total Amount: 2800.00 USD

[Header Details](#) [PO Activities](#) [Add ShipTo Comments](#)
[PO Defaults](#) [Document Status](#)
[Edit Comments](#) [Requisitions](#)

Add Items From **Select Lines To Display**

[Purchasing Kit](#) [Catalog](#) [Item Search](#) Line: To:

Lines								Customize	Find	View All	First
Details	Ship To/Due Date	Statuses	Item Information	Attributes	RFQ	Contract	Receiving				
Line	Item	Description	PO Qty	'UOM	Category	Price	Amount	Status			
1		KEYBOARD	<input type="text" value="2.0000"/>	EA	440000	<input type="text" value="150.00000"/>	300.00	Active			
2		CPU	<input type="text" value="2.0000"/>	EA	440000	<input type="text" value="500.00000"/>	1,000.00	Active			
3		MONITORS	<input type="text" value="4.0000"/>	EA	440000	<input type="text" value="250.00000"/>	1,000.00	Active			
4		GLARE SCREEN REDUCTION KIT	<input type="text" value="2.0000"/>	EA	440000	<input type="text" value="250.00000"/>	500.00	Active			

THIS PO WILL EQUAL TWO COMPUTERS WITH DUAL MONITORS.
 To be consolidated and then unitized into 2 property tags.

PO ID: 0000211047

Budget Status: Valid

Copy From:

Hold From Further Processing

Header

'PO Date: Vendor Search
 Vendor: [Vendor Details](#)
 'Vendor ID: LUSCIOUS LAWNS AND IRRIGATION
 'Buyer: BULL, DANIEL
 PO Reference:

Doc Tol Status: Valid
 Backorder Status: None [Create BackOrder](#)
 Receipt Status: Received
 'Dispatch Method:

[Header Details](#) [PO Activities](#) [Add ShipTo Comments](#)
[PO Defaults](#) [Document Status](#)
[Edit Comments](#) [Requisitions](#)

Amount Summary

Merchandise: 2020.00
 Freight/Tax/Misc.: 0.00
 Total Amount: 2020.00 USD

Add Items From

Select Lines To Display

[Purchasing Kit](#) [Catalog](#) [Item Search](#) Line: To:

Lines

Customize | Find | View All | First

Line	Item	Description	PO Qty	'UOM	Category	Price	Amount	Status
1		TRACTOR SPREADER COMPONENT	<input type="text" value="1000.0000"/>	EA	<input type="text" value="211000"/>	<input type="text" value="1.00000"/>	1,000.00	Active
2		TRACTOR IRRIGATION UNIT	<input type="text" value="1020.0000"/>	EA	<input type="text" value="211000"/>	<input type="text" value="1.00000"/>	1,020.00	Active

THESE ARE PARTS TO MAKE UP A SINGLE PROPERTY TAG to be added to tag # 12345678890
 this will work even with multiple receipts.



PO ID: 0000211049

Budget Status: Valid

Copy From:

Hold From Further Processing

Header

'PO Date: 10/24/2006 Vendor Search
 Vendor: SPYCAMERAS-001 [Vendor Details](#)
 'Vendor ID: 0000015957 SPY CAMERAS SPECIALIST
 'Buyer: KGIBSON GIBSON, KAREN
 PO Reference:

Doc Tol Status: Valid
 Backorder Status: None [Create BackOrder](#)
 Receipt Status: Received
 'Dispatch Method: Phone [Dispatch](#)

[Header Details](#) [PO Activities](#) [Add ShipTo Comments](#)
[PO Defaults](#) [Document Status](#)
[Edit Comments](#) [Requisitions](#)

Amount Summary

Merchandise: 2000.00
 Freight/Tax/Misc.: 0.00 [Calculate](#)
 Total Amount: 2000.00 USD

Add Items From

Select Lines To Display

[Purchasing Kit](#) [Catalog](#) [Item Search](#) Line: To: [Retrieve](#)

Lines

[Customize](#) | [Find](#) | [View All](#) | [First](#)



[Details](#) [Ship To/Due Date](#) [Statuses](#) [Item Information](#) [Attributes](#) [RFQ](#) [Contract](#) [Receiving](#)

Line	Item	Description	PO Qty	'UOM	Category	Price	Amount	Status
1		VISUAL SURVEILLANCE SYSTEM TO BE SHIPPED AS AVAILABLE	2000.0000	EA	451215	1.00000	2,000.00	Active

THESE COMPONENTS MAKE UP ONE CAMERA SYSTEM AND WILL BE SHIPPED AS AVAILABLE BY VENDOR.



Unit: FSU01
 PO ID: 0000211050
 Copy From:

PO Status: Dispatched  
 Budget Status: Valid
 Hold From Further Processing

▼ Header

*PO Date: 10/24/2006  Vendor Search
 Vendor: EXECUOFFIC-002 [Vendor Details](#)
 *Vendor ID: 0000002686 EXECUTIVE OFFICE FURNITURE
 *Buyer: JCORDELL CORDELL, MYRTICE
 PO Reference:

Doc Tol Status: Valid
 Backorder Status: None [Create BackOrder](#)
 Receipt Status: Received
 *Dispatch Method: Phone [Dispatch](#)






[Header Details](#) [PO Activities](#) [Add ShipTo Comments](#)
[PO Defaults](#) [Document Status](#)
[Edit Comments](#) [Requisitions](#)

Amount Summary
 Merchandise: 1000.00
 Freight/Tax/Misc.: 0.00 [Calculate](#)
 Total Amount: 1000.00 USD

Add Items From Select Lines To Display

[Purchasing Kit](#) [Catalog](#) [Item Search](#) Line:  To:  [Retrieve](#)

Lines [Customize](#) | [Find](#) | [View All](#) |  [First](#)

Details	Ship To/Due Date	Statuses	Item Information	Attributes	RFQ	Contract	Receiving	
Line	Item	Description	PO Qty	'UOM	Category	Price	Amount	Status
1		EXECUTIVE DESK	 1.0000	EA	440000 	500.00000	500.00	Active
2		CREDENZA	 1.0000	EA	440000 	250.00000	250.00	Active
3		OVERHEAD SHELVING UNIT	 1.0000	EA	440000 	250.00000	250.00	Active

THIS PO WILL EQUAL ONE COMPLETE DESKS. AS SUGGESTED IN THE LAST TESTING SEGMENT THE FIRST DEPARTMENT THAT COMES TO YOU WILL GET THE PROPERTY TAG ALTHOUGH THIS PURCHASE IS ON THREE DIFFERENT BUDGETS.



Job Aid: <Insert Job Aid Title Here>

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Modified on

11/13/2006