Instructions for Entering a Research Computing
Internal Service Provider (ISP) Form in MyUF MarketPlace

The REC ISP form should be utilized to provide UFIT Billing with valid chartfield information to process payment for Research Computing (RC) products only. UFIT ISP POs do not encumber funds.

RC BILLING PROCESS:
- **The RC PO submittal process varies from other UFIT provided services** (such as Telecom, Computing, etc.) in that there are no monthly recurring charges.
- **RC charges are one-time charges** and are entered into the centralized UFIT billing system within a few days after the customer places the order.
- **Once the charges are entered, UFIT Billing staff will email the fiscal contact a request for PO** (and copy the PI). *The email will provide the customer number, work order number, expense account codes, whether or not the charge is exempt or non-exempt from IDC, and the amounts that should be entered into the ISP form(s).*
- **The charges will not be scheduled for invoice generation (on the next regularly scheduled monthly bill cycle) until the PO is approved by the customer.**
- **UFIT Billing will process the journal payment as part of the once-monthly bill cycle** and post journal payment details on the invoice.
- **A billing notification will be sent out to fiscal contacts assigned to the account once a month at the time the invoices are finalized and ready for review in the portal.** The email will include instructions for reviewing copies.

THINGS TO KNOW BEFORE YOU BEGIN:
- **Grant/Project Funds Expiring Soon:** If you are using funds that expire between the 10th and the last day of the month you are entering this PO, you must have the PO submitted and approved by close-of-business on the 10th. **Also ensure project end dates are extended through the 24th of the month to ensure no budget errors are received when processing the journal payment.
- **Split Payments:** Multiple chartfields are accepted as payment for RC orders, however, they *must be* entered per the special instructions provided in this document for payment to process correctly.
- **Grant Funds 201 or 209:** Per C&G, if using grant Funds 201 or 209 for payment, the service start date MUST be a minimum of six-months prior to the project expiration date in PeopleSoft. If the purchase date does not meet the six-month window, the PI should have entered a justification for the purchase on the space provided on the order form. UFIT Billing is not authorized to process the invoice against these two funds without this justification. For additional guidance on using grant and contract funds for RC services, please see: https://www.rc.ufl.edu/get-support/proposal-support/grant--contract-funds-guide/
- **RC Expense Account Subcodes:** Depending on the product(s) ordered, the PO request email will detail which account code(s) should be entered into the ISP form(s).
- **Budget Availability:** Please ensure budget is available in the correct budget account prior to submitting the requisition.
- **Multiple RC Requests Billing to Same Customer Number:** To differentiate between multiple RC orders billing under the same customer number, **each order is assigned a unique work order number and must be included on the ISP form.** A separate PO is required for each order.
- **The chartfields will be de-activated once used** for this one-time purchase.
- **Empty Shopping Cart:** Your shopping cart should be empty when you begin.

- **Default Supplier:** Do not change the default supplier/fulfillment address

☐ **Login to myUFL here: http://my.ufl.edu and navigate to Main Menu > My Self Service > myUF Marketplace**

☐ **Ensure you start with an empty cart and then click Forms in the top menu bar**
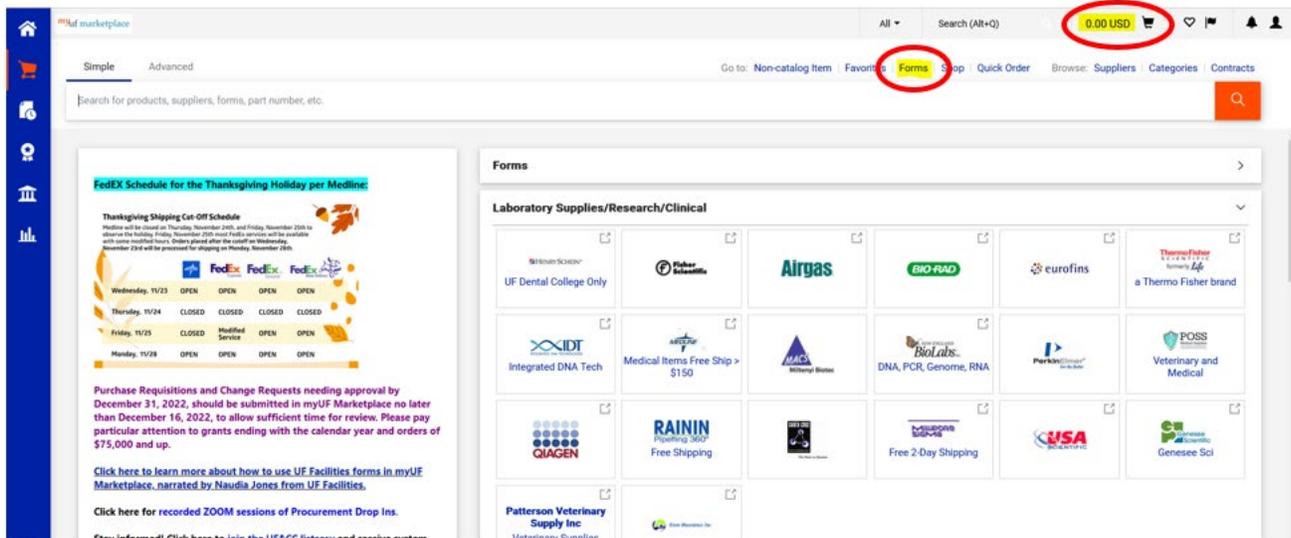
☐ **Click > Shared > Organization Forms > UFIT Services**
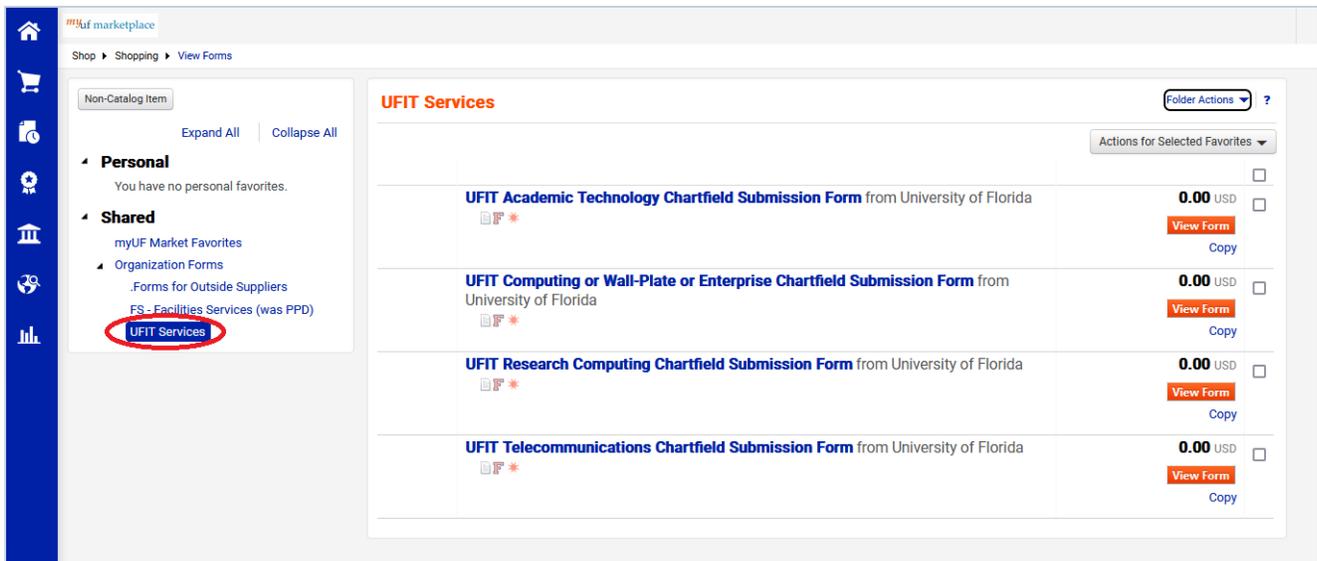
☐ **Click the UFIT Research Computing Request Form link OR the View Form button**
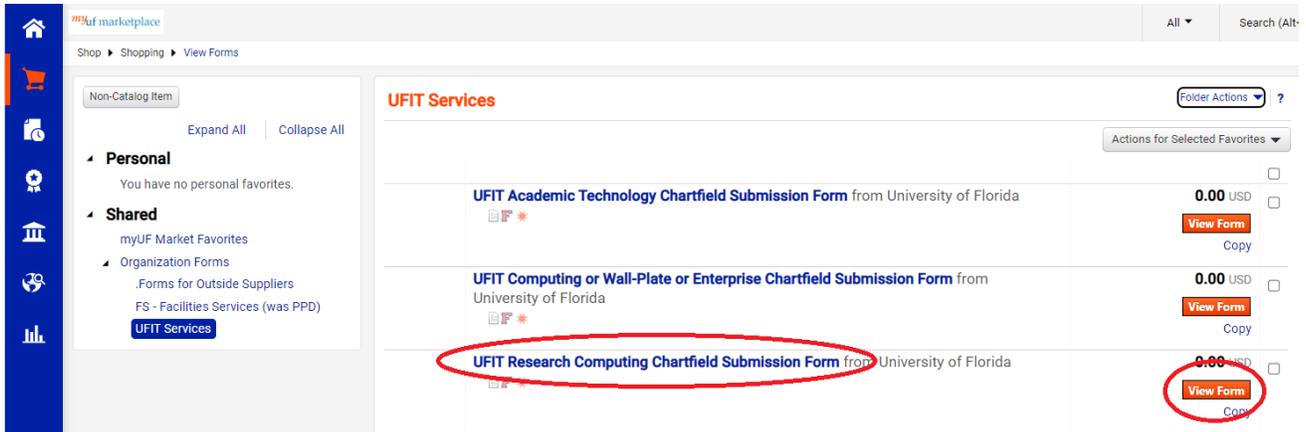
Order Information

- **Description:** Enter a short description
- **Type of Service:**
  Choose the expense account code listed in the PO request email:
  - **711375 – RC Consulting**
  - **711750 – RC Hardware**
  - **711775 – RC Service**
  - *Please make sure that budget is available for each chartfield.*
- **Amount:**
  - **If paying with a single chartfield, enter the full order amount.
    OR**
  - **If paying with multiple chartfields, enter amount for Line 1 (additional lines require separate forms)**
- **Commodity Code:** Enter 81110000-Computer Services
- **Customer ID Number (Required)** - Enter the 8-digit RC Customer Number *(including the –R)*
- **Work Order Number (Required)** – Enter the 4-digit work order number here

UFIT Research Computing Chartfield Submission Form   ❓

Supplier Info

UF | UNIVERSITY of FLORIDA
The Foundation for The Gator Nation

Utilized to provide UFIT Billing with necessary Chartfield information to bill for services rendered. These services include UFIT Research Computing Services.

Please select the type of service and enter a short description in the field provided.
Note: Research Computing Service 711775 and Research Computing Consulting 711375 service types are IDC non-exempt. Only the Research Computing Hardware 711750 is IDC exempt.

Enter your UFIT Customer Number in the bottom portion of the screen. This is a required field.

Split Chartfields (Optional) - In order for split ChartFields to process, separate line items within the same PO are required. This dictates that a new UFIT Research Computing Request Form be submitted to represent each line of the split. Enter the exact amount of the split allocation for the line that each form represents. Once all forms have been submitted, each line should be edited to update any other ChartField fields as needed. Do not use the 'Add Split' function.

Rev Nov 29, 2022
NOTE: Creating a one line item PO with a split charge will NOT process correctly.

Existing Supplier

Supplier *   University of Florida

Fulfillment Address
> **UFIT Research Computing**
> UFIT Research Computing
> PO Box 112099
> Gainesville, Florida 32611 United States

Order Information   ❓

Description *   Enter your chosen description here

                           220 characters remaining   expand | clear

Type of Service: *   Please select...   ▼

Amount (does not encumber) *   Enter Line Amt

Please use Commodity Code 81110000 - Computer Services in the field below.

Commodity Code *   81110000   ✕ 🔍

UFIT Customer ID Number   ❓

Customer ID Number (Required): *   Enter 8-dig (XXXXXXXX-R)

UFIT Work Order Number   ❓

Work Order Number (Required): *   Enter 4-digit (XXXX)

IF YOU ARE USING A SINGLE CHARTFIELD FOR *FULL PAYMENT*, CONTINUE BELOW. If you are splitting the payment between multiple chartfields, YOU MUST FOLLOW SPECIAL INSTRUCTIONS-SKIP TO PAGE 8 NOW.

☐ **SELECT the default "Add And Go To Cart" feature from the drop-down menu in the upper right corner of the screen.**

☐ **Click "Proceed to Checkout"**

☐ **Select the "Edit Chartfields Section" button and enter the chartfield string you want to use. Ensure the account code listed matches the form:**
  - ○ **711375 – RC Consulting**
  - ○ **711750 – RC Hardware**
  - ○ **711775 – RC Service**

☐ **Click the "Assign Cart" button in the upper right-hand corner of the screen to assign to a Requestor. Make sure to follow-up to ensure the requisition is approved in a timely manner.**

☐ **Submit and ensure the requisition gets a PO number assigned. An approved Research Computing ISP PO number will begin with the prefix FYREC (i.e. 23REC).**

If you have any questions, please e-mail the UFIT Business Center's Billing Team at it-bc-ufitbill@mail.ufl.edu.

SINGLE EXAMPLE:

Chartfield paying for entire order amount of $750

Form/Line 1:   711750-Hardware $750   Chartfield 1

Order Information   ❓

Description *   XXXXXXXX-R Faculty Member's Name and Brief Description of Service

189 characters remaining   expand | clear

Type of Service: *   Research Computing Hardware Non-IDC - 711750 ⌄

Amount (does not encumber) *   750.00

Please use Commodity Code 81110000 - Computer Services in the field below.

Commodity Code *   81110000   ✕ 🔍

UFIT Customer ID Number   ❓

Customer ID Number (Required): *   XXXXXXXX-R

UFIT Work Order Number   ❓

Work Order Number (Required): *   XXXX

CHARTFIELD ENTRY:

Line No.	Item Description	Amount	Dept ID	Fund	Program	Account	Budget Reference	Source of Funds	Dept Flex	UFID	PC Bus Unit	Project	Activity ID	CRIS
Line 1	XXXXXXXX-R Faculty Member's Name and Brief Description of Service	750.00	XXXXXXXX	XXX	XXXX	711750								
		TOTAL $750.00												

SPLITS - IF PAYING WITH MULTIPLE CHARTFIELDS, CONTINUE BELOW

> **Split Specific Info:**
> ➢ A separate form/PO line is required for each <u>unique</u> chartfield string that will be used.
>
> Reminder: If you are using <u>the same chartfield string to pay for the full order, multiple lines should NOT be entered.</u> You can simply combine the total for that account code into the same chartfield line.

☐ **CONTINUE TO ENTER ADDITIONAL FORMS by SELECTING the "Add to Cart and Return" feature from the drop-down menu in the upper right corner of the screen.**

REFER TO PAGE 3 for help on ORDER INFORMATION FIELDS

☐ **<u>Once all forms have been entered to total the full payment of the order</u>, SELECT the "Add And Go To Cart" feature from the drop-down menu in the upper right corner of the screen.**

☐ **Click "Proceed to Checkout" to complete the chartfield information for each line.**

☐ **Scroll down to the Items section. Click the "Line Item Actions" buttons in the far right column and click "Accounting Codes 1" to enter the chartfields for each line, and make sure the account code matches the one referenced on the corresponding form. If you click the item description on the far left column next to the item number, it will allow you to review the form if needed. Click the "Save" button when you are finished entering the chartfield information.**

Do not use the ADD LINE (+) feature to add an additional chartfield within the same line.

☐ **After the chartfields appear for the other lines, you can use the "Edit Accounting Codes" button to edit the remaining chartfields.**

☐ **Submit and ensure the requisition gets a PO number assigned. An approved Research Computing ISP PO number will begin with the prefix FYREC (i.e. 23REC).**

If you have any questions, please e-mail the UFIT Billing Team at it-bc-ufitbill@mail.ufl.edu or call 352-392-7449, ext. 3

SPLIT EXAMPLE:

$750 ORDER TOTAL for 711750-Hardware account code will be paid using three separate chartfields.

Form/Line 1: 711750-Hardware $500   Chartfield 1

Form/Line 2: 711750-Hardware $200   Chartfield 2

Form/Line 3   711750-Harware $50   Chartfield 3

Order Information   ❓

Description *   XXXXXXXX-R Faculty Member's Name and
                                 Brief Description of Service

                                 189 characters remaining   expand | clear

Type of Service: *   Research Computing Hardware Non-IDC - 711750 ⌄

Amount (does not encumber) *   50.00

Please use Commodity Code 81110000 - Computer Services in the field below.

Commodity Code *   81110000   ✕ 🔍

UFIT Customer ID Number   ❓

Customer ID Number (Required): *   XXXXXXXX-R

UFIT Work Order Number   ❓

Work Order Number (Required): *   XXXX

CHARTFIELD ENTRY:

Line No.	Item Description	Amount	Dept ID	Fund	Program	Account	Budget Reference	Source of Funds	Dept Flex	UFID	PC Bus Unit	Project	Activity ID	CRIS
Line 1	XXXXXXXX-R Faculty Member's Name and Brief Description of Service	500.00	XXXXXXXX	XXX	XXXX	711750								
Line 2	XXXXXXXX-R Faculty Member's Name and Brief Description of Service	200.00	XXXXXXXX	XXX	XXXX	711750								
Line 3	XXXXXXXX-R Faculty Member's Name and Brief Description of Service	50.00	XXXXXXXX	XXX	XXXX	711750								
	TOTAL	$750.00												