FMS 970 How to Maintain Inventory

This guide will show how to enter a new part, issue a part from the warehouse, return a part to warehouse or vendor, lock and unlock a part for inventory updates, and transfer a part between warehouses and bins.

Before you begin . . .

Upon completion of this guide you will be able to:
- Sign in to FAMIS
- Enter a new part record
- Issue a Part from the warehouse
- Return a part to warehouse or vendor
- Lock and unlock parts for cyclecount
- Transfer parts between warehouses

Who has access?
Warehouse personnel and Administrative Services

What does it affect?
Management of parts using FAMIS

How to log in?
Contact the Help Desk for security access to FAMIS.

Additional Resources
http://cafe.northwestern.edu/training/

Where to get help? For assistance, contact NUIT Support Center at 847-491-HELP (4357), or email consultant@northwestern.edu
Hot Tip: Dual Warehouse Responsibilities

If you need to manage parts in one or more warehouses, you need to change your default warehouse to have access.
Getting Started: Navigating to Part Management-New Part

[Diagram showing the FAMIS Xi Navigator with the path selected: Issues & Returns > Part Management > Part]
Step 1: Enter Part Information

You should create a new part record before you place a Purchase Order in PeopleSoft and FAMIS.

Quick entry tip:
1. Find similar part record
2. Click to insert new record
3. Click to duplicate record
4. Make changes to new part information
5. Save

Note: Part Type can be Stock, Non-Stock (used with catalog part #), Direct (used on specific WO), or Benchstock.
Step 2: Enter Part Location and Warehouse

Enter location now to facilitate the receiving process later.

Click X to close Bins form.
**Step 3: Enter Part Warehouse Information**

If a part can be held in **multiple warehouses**, select the warehouses during record set up.

- **Warehouse Information**
  - **Warehouse**: EVELEC
  - **On Hand**: 432.00
  - **Reorder Point**: 9.00
  - **Safety Stock**: 10.00

**Note:** You can run a report to find which parts need to be reordered. Look in Reports>Parts>**Part Reorder Detail Report by Part**.
Step 4: Note Part Number for Purchase Order

Click X to close Part form. You can now create a Purchase Order in PeopleSoft and then in FAMIS. See How to Purchase for Facilities guide. When part is received, enter receipt in PeopleSoft and in FAMIS. The quantity and price will adjust automatically.
Option: Review Part Transaction History

You can review the transaction history of a part.
Getting Started: Navigating to Issues & Returns

A part can be issued on a work order by a supervisor or by warehouse personnel. A supervisor will do it directly from the Work Order.

![Diagram of FAMIS XI Navigator](image)
Step 1: Issue a Part from Warehouse

1. Verify warehouse

2. Select Employee to receive part

3. Select date of issue by right clicking in date field and selecting List Values, select date from calendar.

You can type in a WO Number or search for one by clicking and querying for the WO Number
Step 2: Issue a Part from Warehouse

1. Select part list type

2. Search for Part by placing cursor in field and in Edit drop down menu, select List Values

3. Enter part quantity to be issued

4. Select Save and Print or OK

Note about Part Type List:

- If a Supervisor has entered an Issue Request with the WO, select WO, select Issue Request, click in Part No. field, if the part information doesn’t populate, click in WO description field.
- If work order has parts listed, but not requested, select WO, select Work Order Part List, you may still have to search for part.
- If work order didn’t have any parts associated with it, select WO, select No List Available, and search for part.

Click X to close form.
Step 1: Return a Stock Part to the Warehouse

A part should be returned so a credit can be placed on the work order. Stock parts are returned to the warehouse. Direct parts are returned to vendor, see guide for how to Purchase for Facilities for returns to vendors.

You can verify this by reopening the **Issue No.** and seeing the quantity returned or by clicking on the **Issue History** button in the part record or by viewing the transfers listed in the **Work Order Cost Summary** form.
Option: Cancel Part Issue Request

In the Parts tab of the Work Order form, use the Issue Requests list to cancel an issue request for a part.

Note: An Issue Report will print in the warehouse to cancel the request.
Getting Started: Navigating to Part Management-Part Lock

The process is for locking and unlocking stock parts from being issued while a cycle count is performed.
**Step 1: Lock a Part for Inventory Audit**

1. Select Warehouse, Part Type, Commodity and Status, as needed

2. Click Find

3. Use bottom scroll bar to move across and select check box for part(s) to be locked

4. Click Lock

**Note:** When a part is locked it will be removed from the **Lock Parts** list until it is unlocked.
Getting Started: Navigating to Part Management-Part Lock Release

Create a QuickPick button!

Double Click
Step 1: Unlock a Part for Inventory Audit

1. Select Warehouse, Part Type, Commodity, and Status, as needed

2. Click Find

3. Use bottom scroll bar to move across and select check box for part(s) to be unlocked

4. Click UnLock

© 2008 Northwestern University
Getting Started: Navigating to Part Management-Transfer Part Out

The process is for transferring parts between warehouses and between bins within a warehouse. Unique bin numbers will be assigned to Field Technicians to have parts on hand. When a part is used from a Technician’s bin, it must be linked to a chart string account.
Step 1: Enter Warehouse information

Note: Employee is warehouse personnel doing the transferring.

For Employee and To Warehouse, right click, select List Values and select employee and warehouse.

To find a part, place cursor in Part No field, then click Edit drop menu and select List values or press F9.
Step 2: Select Part to Transfer Out

Search for a Part by using query icons or

Search for a Part using tabs or

Select Part by clicking box of Part row and click OK, below

Note: You can also look for a part using the Part Alias report in Cognos.
Step 3: Enter Quantity to Transfer Out

Parts may be kept in several bin locations.

An automatic e-mail will be sent between warehouses when a part is transferred.
Step 4: Change Default Warehouse

When you need to manage parts in **one or more warehouses**, you need to change your default warehouse to have access.
Step 5: Verify or Create Part Location in Warehouse to Transfer part into

1. In Part Form, search for part number
2. Click Bins

3. Click Add and enter bin location as done with new parts

Click Save and close.
Getting Started: Navigating to Part Management-Transfer Part In

Create a QuickPick button!

Double Click

[Diagram of FAMIS xi Navigator window with highlighted options: Inventory Administrator, Part Management, Transfer Part In, etc.]

How to Maintain Inventory © 2008 Northwestern University 10/9/2008
Step 1: Find Transfer Number and Enter Quantity
Transfer the same part that you transferred out to transfer in here.

1. Verify correct warehouse
2. Place cursor in Transfer No.
3. Click Enter Query icon and enter TR No. in field
4. Click Execute Query

An automatic e-mail will be sent between warehouses when a part is transferred. Click X to close.

Note: Make sure you transfer parts into correct bin location if there are multiple bins.
Option: Review Part Holdings

You can review holdings in your default warehouse in the Material Catalog.
Option: Review Part Holdings

You can review holdings by looking in part record.

![Review Warehouse Information](image)