FMS 970 How to Purchase for Facilities

This training guide will show how to create a purchase order and enter a receipt for stock and direct parts.

Before you begin . . .

Upon completion of this guide you will be able to:
- Sign in to FAMIS
- POs and Receipts for stock and direct parts

Who has access?
FM administrative services staff, warehouse personnel, and project managers.

What does it affect?
Purchase Orders now originate in PeopleSoft and then are reentered into FAMIS

When is this used/not used?
This is only used for purchase of parts.

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
Getting Started: Navigating to Purchase Order form

Create a QuickPick button!

Double click

Purchase Orders
Step 1: Enter Purchase Order Information for Part Orders

Before entering a Purchase order in FAMIS, you must have created a purchase order in PeopleSoft; the PeopleSoft PO number is used here in FAMIS. Cross reference the part number in the PeopleSoft PO. The difference between a stock and a direct purchase order is the cross reference to a WO Number which you will see in Step 4.

Note:
- You can also query for a vendor using query icons.
- To create a new Vendor in FAMIS, contact the Manager of Administrative Services.
Step 2: Enter Purchase Order Information for Part Orders

Note:
- For **stock** parts, Buyer and Requester many times will be the same.
- For **direct** parts, Buyer will be warehouse personnel and Requester will be Supervisor of a crew or shop.
Step 3: Enter Purchase Order Information for Part Orders

Click **Lines** tab to open Line Detail form.

**Note:** You can also look for a part using the **Part Alias** report in Cognos.
Step 4: Enter Purchase Order Information for Part Orders

Note:
- For **stock** parts, a WO Number is not needed.
- For **direct** parts, a WO Number is required. Type in WO number or to perform search for WO, select crew/shop, and use search icons to find WO number.
- For **direct** parts, skip **Accounts** step since the account is on WO and go to General tab.
Step 5: Enter Purchase Order Information for Part Orders

1. Select Purchase Orders
2. Enter same chart string as on the PeopleSoft Purchase Order
3. Enter percentage allocation, always 100% with parts orders
4. Click OK

Click OK again to return to Purchase Order form.

Click Save and close.
Step 6: Enter Receipt for Part Orders

Create a QuickPick button!

Double Click

Open

Type: All Menu Items
Step 7: Enter Receipt for Stock Part Orders

1. Enter PeopleSoft PO Number and press tab
2. FAMIS will assign a Receipt Number—do not use PeopleSoft Receipt Number

For Stock parts, Place cursor in Bin field.

Enter or confirm part location and click OK
Enter quantity received or click All box
Use bottom scroll bar to move to Received field
Click OK
Step 8: Enter Receipt for Direct Part Orders

For Direct parts, place cursor in Bin field.

Click **Save** and close.

**Note**: You can see direct parts received several ways:
- Look on the Part record and clicking on the **History** button and clicking on the **Issue History** button. This will display the Issue No. as well.
- Look on the **Work Order Cost Summary**
Step 9a: Return a Part to Vendor

Create a QuickPick button!

Double Click

Return to Vendor
Step 9b: Return a Part to Vendor

1. Enter PO Number

2. Verify Return Information

3. Use scrollbar to find and enter Returning amount

For a Direct Part, you will get a Maintenance Issue number to reference the return to vendor:

If Part Number does not populate automatically, place cursor in field, click Edit drop down menu, select List Values, and search for Part number. You can look up the Maintenance Issue No. to verify that the quantity has been recorded as returned.