FMS 980 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

Double click on "Purchase Orders" under "Purchasing" in the FAMIS Xi Navigator.
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.

- You can also query for a vendor using query icons.
- To create a new Vendor in FAMIS, contact 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.

Click to search for Part Number
Search for a Part using tabs or
Search for Part by selecting a warehouse and clicking Find
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 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

Note: If you want help with the chart string format, click Accounts button and enter each chart field separately.

Click OK again to return to Purchase Order form.

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

Double click on the Receipts folder.
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**
- Use bottom scroll bar to move to Received field
- Enter quantity received or click **All** box
- 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

Double click

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

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

1. Enter PO Number
2. Verify Return Information
3. Use scrollbar to find and enter Returning amount

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.