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Encumber Funds in Purchasing

**ENCUMBRANCES**
Encumbrances in the FAMIS purchasing module are established when a document is closed. The encumbrances are created at the account and object code level. An encumbrance is generated for each account and object code combination on a document. The encumbrance is keyed primarily by the document (requisition or purchase order number).

All encumbrances established by the purchasing module are posted into the financial accounting module. These encumbrances may be viewed on the Open Commitment screens (see the Open Commitment Section below).

**REQUISITIONS**
Encumbering in the FAMIS purchasing system begins with the requisition. Most requisitions are encumbered. The encumbrances are established using the 7-digit document ID created when the requisition is entered.

The encumbrances are not established until the document is closed on Screen 256. Once the document is closed, no changes can be made unless the document is reopened. If changes are made which affect any amount, adjustments will be made in the encumbrances when the document is closed again.

Note, if the document is submitted to routing when it was closed, it cannot be reopened without recalling the document from routing.

**PURCHASE ORDERS**
Purchase orders are also encumbered by FAMIS. In most cases, a purchase order will be established by the purchasing department transferring items from a requisition.

When a purchase order document is closed, the system will check to see if this purchase order was created from transferring a requisition. If it was, the system will release the encumbrances created from the requisition and establish new encumbrances under the purchase order number.

If a requisition is transferred to a bid document, the encumbrances will remain under the requisition number until the bids are opened and the purchase order is created and closed.

**USER REFERENCE NUMBER**
The user reference number entered on the header of the requisition will be transferred to the purchase order. Therefore the encumbrances will contain the same user reference number for both the requisition and purchase order.

**BASIC REQUISITION INFORMATION**
A requisition is used to capture information that pertains to the request for purchase of merchandise and/or services.

For each requisition you will use the following screens:

- **250** Requisition Header
- **251** Requisition Ship To/Invoice To addresses and text
- **254** Requisition Line Items
- **256** Requisition Document Close
REQUIRED INFORMATION

FAMIS requires you to enter standard information in order to process a purchase requisition on-line. The information required includes the following:

- You must specify the DEPARTMENT originating this requisition as well as any additional departments that may be splitting this order. (Your four letter department code will automatically be entered)

- The CATEGORY, which is used to define certain accounting and receiving characteristics about the requisition must be identified prior to processing the requisition. Examples of several categories include:
  - **RO** Regular Order Category used for Requisitions and Purchase Orders with ‘regular processing’; usually has a three-way match.

- You must provide the USER REFERENCE NUMBER, which is a unique identifier assigned by your department for tracking this purchase requisition. Typically, the User Reference number is made up of the subsidiary ledger account number that will be paying for the order followed by the departmental reference number (often the departmental voucher associated with the order).

- You must ask yourself, “Will the items being requested be used for RESEARCH purposes”? If so, you must indicate it on the requisition header (Screen 250).

- You should also ask yourself, “Is the merchandise I am requesting a SOLE SOURCE item?” (Meaning that you can only purchase the order from a single specific vendor). If so, Screen 253 (Sole Source) needs to be completed before the requisition may be processed.

- Is this an EMERGENCY purchase? Emergency purchases must be identified on the requisition header (Screen 250).

- You need to provide a VENDOR IDENTIFICATION NUMBER or Federal Employer Identification Number for all of your suggested vendors. If you are not sure of it, the Vendor Identification Number can be found on-line by typing the name, or a portion of the name, of your vendor in the vendor ID field. This accesses an alphabetical listing of all vendors found on the system. (where you got the pricing from)

- ADDRESSES for shipping and invoicing are also required in order to process your requisition.

- You must include a complete DESCRIPTION of all of the items you are requesting. Item descriptions are entered on Screen 254. If you run out of room, you may continue your item description on Screen 255.

- Finally, you must indicate all of the ACCOUNTS that will be responsible for the purchase of the items on the requisition.
**CHANGING A REQUISITION**

Sometimes you may need to make changes to your requisition. However, changes may only be processed when the requisition is reopened. To reopen a document, advance to Screen 258 and set the Reopen Document flag to ‘Y.’ If changes are made which affect any amount, adjustments will be made in the encumbrance when the document is closed again.

If the document is already in the routing and approvals system, it must be recalled from your out-box in order to open it.

You may open and close, reopen and close your document as many times as is necessary before you send it into the routing and approval system of FAMIS. But you may need to make changes to it after it has already been sent into routing. For example, you may need to change an account object code on a document after you have closed it and sent it into routing. However, before you can make those changes, you must remove the document from the routing system. To do this, you should:

- Advance to Screen 912 (your document Out-Box).
- Locate the document you would like to reopen and type an ‘X’ next to it.
- Press PF5 to recall the document from the routing and approval system.
- Advance to Screen 258 to reopen the document.

**ROUTING THE DOCUMENT**

A closed document may be submitted to the routing and approval process by pressing the PF7 key on the appropriate close screen (Screen 256). **Please Note:** If the document is submitted to routing when it is closed, it cannot be reopened without first recalling the document from routing.

**REJECTED DOCUMENTS**

If errors are detected to your document while in routing, it will be rejected and returned to your in-box for correction. When this happens, you should:

1. Select the document by typing an ‘X’ next to it in your in-box and then pressing the PF8 (Sel) key.

2. Once the Routing Document Information pop-up window appears, <TAB> down to the Action: prompt and type NOT to display the routing notes (which will contain the reason(s) for its rejection).

3. Reopen the document on Screen 258 by setting the Reopen Document flag to ‘Y’ and pressing <ENTER>.

4. Make the necessary changes using Screens 250-259.

5. Finally, advance to Screen 256 to close and re-route the document.
Create/Modify Requisition Headers

The first step to creating a requisition involves specifying header information pertaining to the entire order, regardless of individual line item information. You may use Screen 250 to enter this general requisition information. Header information typically includes the document category, the originating and, when necessary, supporting departments, people to contact, and suggested vendors.

**Screen 250 - Requisition Header Create/Modify**

250 Req. Header Create/Modify

**Automatic Requisition Creation**

FAMIS will automatically assign the seven (7) character requisition number. This is accomplished by entering the desired requisition prefix (R) followed by a zero (0) in the Doc: field on the Action Line.

**BASIC STEPS**

**Creating a New Requisition**

□ Advance to Screen 250.

□ Type an ‘R’ prefix followed by a zero (0) and press <ENTER>. The Dept: and SubDept: fields will be filled in with the appropriate data. If not, you must enter the necessary codes in these fields. If no information is included, everything you enter on this screen will be lost when you press <ENTER>.

□ Enter the category, indicate whether the requisition is for research, enter the User Reference number, type of funds, type of order, and document summary.

□ Indicate whether the requisition is an emergency purchase, or a sole source purchase.

□ Type additional information in the available fields, as desired, and press <ENTER> to record the requisition information.

□ If all information has been successfully entered, the system assigned requisition number will be displayed on the Action Line.
NOTE: The creator’s default department will automatically be filled in. The department for each account used in the requisition must be entered on the header. You can check the department on each account by using Screen 6 or Screen 29.

**Document Categories**
Categories are used to define certain characteristics of the requisition for accounting and receiving.

**RO Regular Order**
Category used for Requisitions and Purchase Orders with ‘regular processing’; usually has a three-way match.

**Vendor Search and Select**
Vendor search and selection is available for all Vendor ID numbers. If the vendor address entered is different from the vendor file information, a pop-up window appears requesting address verification. The user may decide to use the file information or keep the address entered.

**FIELD DESCRIPTIONS**

**Action Line**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Doc:</td>
<td>7 character/digits</td>
</tr>
<tr>
<td>Entry Required</td>
<td></td>
</tr>
<tr>
<td>Enter R and zero (0) to have FAMIS assign a requisition number, or type the number of an existing requisition.</td>
<td></td>
</tr>
</tbody>
</table>

**Screen Information**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Doc. Year:</td>
<td>4 digits</td>
</tr>
<tr>
<td>Indicate the fiscal year of the document. The field defaults to the current system fiscal year.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>15 digits</td>
</tr>
<tr>
<td>Signifies the total dollar amount of all line items entered on the requisition, as calculated by the system.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document:</td>
<td>8 digits</td>
</tr>
<tr>
<td>Indicate the date the requisition is created. The field defaults to the current system date.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cat:</td>
<td>2 characters</td>
</tr>
<tr>
<td>Help Available</td>
<td></td>
</tr>
<tr>
<td>Identify the document category which is used to define the accounting and receiving characteristics of the document.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Ref:</td>
<td>14 digits</td>
</tr>
<tr>
<td>Identify the User Reference number, which indicates the Subsidiary ledger (SL) account number used for the order Followed by the departmental requisition number.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Required:</td>
<td>NEW</td>
</tr>
<tr>
<td>8 digits</td>
<td></td>
</tr>
<tr>
<td>Identify the date the requested order/service is needed This allows the creator to enter a “need by” date.</td>
<td></td>
</tr>
</tbody>
</table>
FIELD DESCRIPTIONS (CONT’D)

Contact Person:  20 characters
Enter the name of the person to contact if there are any questions/ problems regarding the requisition. for Purchasing, Receiving and the Business Office.

PH:  10 digits
Indicate the area code and phone number for the requisition’s contact person.

Start:  NEW  8 digits
Identify the start date (usually the first day of the fiscal year) for a Maintenance Agreement or for other contracts/agreements. This allows the creator to state a “need by” date.

End:  NEW  8 digits
Identify the last date of a Maintenance Agreement or for other contracts/agreements.

Research (Y/N):  1 character
Indicate whether or not (‘Y’ or ‘N’) the purchase items are intended for Research purposes.

Dept:  5 characters  ? Help Available
Department of the primary account responsible for the requisition.

SubDept:  5 characters  ? Help Available
Department of the primary account responsible for the requisition.

Attachments:  1 character
Indicate whether or not (‘Y’ or ‘N’) there are attachments for the requisition.

Doc Summary:  50 characters
Identify a brief summary of the requisition document as a whole. This description will be displayed on the document inquiry screens and does not print to the purchase order.

Sole Source (Y/N):  1 character
Indicate whether or not (‘Y’ or ‘N’) the merchandise/service requested is a sole source item (i.e.: whether or not only one vendor may fulfill the order).

Emergency (Y/N):  1 character
Identify whether or not (‘Y’ or ‘N’) this is an emergency purchase.
**FIELD DESCRIPTIONS (CONT’D)**

**Suggested Vendors**

This allows the department to suggest vendors for the requisition.

**Note:** You can access the vendor search and select pop-up window by typing an asterisk (*) in the Vendor ID fields.

**Vn ID:** 11 digits  *Help Available*
Type *'*' to select a vendor or enter the FAMIS Vendor Identification number.

**or FEI:** 9 digits
Identify the Federal Employer Identification number, if not using the vendor ID.

**Addr:** 90 characters
Shows mailing address of the suggested vendor.

**PH:** 10 digits
Provides the area code and phone number of the suggested vendor.

**FAX:** 10 digits
Includes the area code and FAX number of the suggested vendor.

**TO ADD ANOTHER DEPARTMENT/ACCOUNT TO PAY YOU WILL NEED TO ADD THEIR FOUR LETTER CODE: (F11) and enter the department code under your department code. DO NOT ERASE YOURS.**

---

Enter all Campus Codes and Departments/SubDepartments that will have accounts on this document

<table>
<thead>
<tr>
<th>Dept</th>
<th>SubDept</th>
<th>CC</th>
</tr>
</thead>
<tbody>
<tr>
<td>PURC</td>
<td>_____</td>
<td>16</td>
</tr>
<tr>
<td>VPBS</td>
<td>_____</td>
<td>16</td>
</tr>
<tr>
<td></td>
<td>_____</td>
<td>___</td>
</tr>
<tr>
<td></td>
<td>_____</td>
<td>___</td>
</tr>
<tr>
<td></td>
<td>_____</td>
<td>___</td>
</tr>
<tr>
<td></td>
<td>_____</td>
<td>___</td>
</tr>
<tr>
<td></td>
<td>_____</td>
<td>___</td>
</tr>
<tr>
<td></td>
<td>_____</td>
<td>___</td>
</tr>
</tbody>
</table>

Press <PF4> to Exit
**FIELD DESCRIPTIONS (CONT’D)**

**Additional Functions**

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PF5</td>
<td><strong>Next</strong></td>
</tr>
<tr>
<td></td>
<td>Next</td>
</tr>
<tr>
<td></td>
<td>Used to advance to the <strong>next screen</strong>.</td>
</tr>
<tr>
<td>PF7</td>
<td><strong>Sole Source Reason</strong></td>
</tr>
<tr>
<td>SResn</td>
<td>Indicates the <strong>reason</strong> that the <strong>Sole Source</strong> flag has been set to ‘Y.’</td>
</tr>
<tr>
<td>PF8</td>
<td><strong>Emergency Reason</strong></td>
</tr>
<tr>
<td>EResn</td>
<td>Displays the <strong>reason</strong> that the <strong>Emergency</strong> flag has been set to ‘Y.’</td>
</tr>
<tr>
<td>PF9</td>
<td><strong>Notes</strong></td>
</tr>
<tr>
<td>Notes</td>
<td>Used to enter <strong>free-form notes</strong> about the requisition. <strong>Note:</strong> These are on-line reference notes regarding the document. They will <strong>not</strong> be printed.</td>
</tr>
<tr>
<td>PF10</td>
<td><strong>Additional Suggested Vendors</strong></td>
</tr>
<tr>
<td>AdVen</td>
<td>Allows the addition of four <strong>additional suggested vendors</strong> for the requisition.</td>
</tr>
<tr>
<td>PF11</td>
<td><strong>Additional Departments</strong></td>
</tr>
<tr>
<td>AdDpt</td>
<td>Allows the addition of 10 extra <strong>department/sub-departments</strong> that will have approval and accounts on this requisition.</td>
</tr>
</tbody>
</table>
Enter Requisition Shipping

Before submitting a requisition, you must first identify where information and products are to be shipped. For example, you must provide the address to which items will be shipped as well as the address to which the invoice should be mailed. Special vendor instructions, in the form of text codes must also be specified before an order may be processed. You may enter all of the above information using Screen 251.

Screen 251 - Requisition Shipping and Text

<table>
<thead>
<tr>
<th>Screen 251 - Requisition Shipping and Text</th>
</tr>
</thead>
<tbody>
<tr>
<td>251 Req. Shipping and Text</td>
</tr>
<tr>
<td>Screen: ___  Doc: R001078</td>
</tr>
<tr>
<td>Ship To Address Nbr: 001</td>
</tr>
<tr>
<td>Name: CENTRAL RECEIVING</td>
</tr>
<tr>
<td>Addr: TEXAS A&amp;M INTERNATIONAL UNIV</td>
</tr>
<tr>
<td>5201 UNIVERSITY BLVD</td>
</tr>
<tr>
<td>CARROLLTON TX 75110</td>
</tr>
<tr>
<td>City: LAREDO_ State: TX</td>
</tr>
<tr>
<td>Zip: 780411 1900 Country: __</td>
</tr>
<tr>
<td>Phone: 956-326-2355 FAX: 956-326-2349</td>
</tr>
<tr>
<td>Text codes: __ __ __ __ __ __ __ __ __</td>
</tr>
<tr>
<td>Additional __ __ __ __ __ __ __ __ __ __</td>
</tr>
<tr>
<td>Text Lines: ___________________________</td>
</tr>
<tr>
<td>Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---</td>
</tr>
<tr>
<td>Hmenu Help EHelp Next Notes</td>
</tr>
</tbody>
</table>

**BASIC STEPS**

- Advance to Screen 251.
- Type your requisition number on the Action Line and press <ENTER> to display existing information, if any.
- Enter a valid address number, <001 and 002> which will give you the address where the requested items should be delivered as well as the address where the invoice should be mailed.
- Press <ENTER> to record the information.

**Additional Functions**

PF5 Next

Advances to the next screen (Screen 254), for entering additional line item information.

PF9 Notes

Used to enter free-form notes about the requisition. **Note:** These are on-line reference notes regarding the document. They will not be printed.
Create/Modify Requisition Line Items

Entering item information is perhaps the most important step in the process of creating your requisition. It is here, on Screen 254, that you provide information about the items you are requesting for purchase. Each individual line item for the requisition must be entered separately. You may input up to 900 different lines for a single requisition. You must specify the unit price, the description, and provide a list of all accounts responsible for payment for each of the items requested.

Screen 254 - Requisition Line Item Create/Modify

<table>
<thead>
<tr>
<th>FY</th>
<th>CC</th>
<th>Account</th>
<th>Pct</th>
<th>Amt $</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>16</td>
<td>210064</td>
<td>00000</td>
<td>4080</td>
</tr>
<tr>
<td>2010</td>
<td>16</td>
<td>210007</td>
<td>00000</td>
<td>4080</td>
</tr>
</tbody>
</table>


Sometimes there is not enough space to type in the whole description for the items you have entered on Screen 254. When this happens, you may have to use Screen 255 to add more information. Screen 255 can hold up to ninety-nine additional lines of text about your line item. Any text you enter on this screen will appear on the purchase order when printed.

Please Note: You have to be careful entering text on this screen, as there is no wrap around feature. This means that you may accidentally split a word between two lines. However, pressing the (TAB) key will take you to the start of the next line and will help you avoid splitting any of your words.

Screen 255 - Requisition Item Description

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Jerzee 100% cotton adult pre-shrunk t-shirts__</td>
</tr>
<tr>
<td>2</td>
<td>with white imprint on front and back.________</td>
</tr>
<tr>
<td>3</td>
<td>5.6 ounce; two-needle coverstiched on front___</td>
</tr>
<tr>
<td>4</td>
<td>neck; shoulder to shoulder taping.____________</td>
</tr>
<tr>
<td>5</td>
<td>Front:____________</td>
</tr>
<tr>
<td>6</td>
<td>Texas A&amp;M International University________</td>
</tr>
<tr>
<td>7</td>
<td>Dusty Camp________________________________</td>
</tr>
<tr>
<td>8</td>
<td>New Student Orientation___________________</td>
</tr>
<tr>
<td>9</td>
<td>Back:____________________________________</td>
</tr>
<tr>
<td>10</td>
<td>TAMIU__________________________________</td>
</tr>
<tr>
<td>11</td>
<td>Class of 2014____________________________</td>
</tr>
<tr>
<td>12</td>
<td>The Traditions Start Here_________________</td>
</tr>
<tr>
<td>13</td>
<td>Imprint area size is 12“ wide by 8“ tall____</td>
</tr>
<tr>
<td>14</td>
<td>Sizes are as follows:______________________</td>
</tr>
<tr>
<td>15</td>
<td>500 -small________________________________</td>
</tr>
<tr>
<td>16</td>
<td>300 -medium_______________________________</td>
</tr>
</tbody>
</table>

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---

Hmenu Help EHelp  ENTER FOR MORE LINES UP TO 99 LINES
Create/Modify Requisition Line Items (Cont’d)

**BASIC STEPS**

- Advance to Screen 254.
- Type a valid requisition number in the Action Line.
- Press <ENTER> to display existing line item information.
- Type the quantity you are requesting, the unit of measure, the unit price, the commodity code, and the line item description.
- Type the account number(s) and object code(s).
- Enter either a percentage or a dollar amount to be paid by the account. Do NOT enter both a percentage and a dollar amount.
- Type additional data in the available fields, as desired.
- Press <ENTER> to record the line item information.

**IF ADDITIONAL LINES ARE NEEDED:**

- Advance to Screen 255.
- Type a valid requisition number in the Action Line.
- Press <ENTER> to display existing requisition text.
- Add or modify requisition text in the available fields, as desired.
- Press <ENTER> to record the information.

**Screen Information**

Position at line ___ of __: 3 digits
Indicate which line of text should be positioned at the top of the screen.

Line: 3 digits
Specifies a line number of the description.

Description: 99 lines (45 characters each)
Type a complete description of your line item.
Note: There is no word wrap feature.

Page (F/B/E): 1 character
Signify whether to scroll forward (F) or backward (B) through text lines or end (E) the editing session and advance to the next required requisition screen.
REQUISITION LINE ITEM PROCESS

**Line Item Entry**
Documents may have up to 500.0 items. The item number will default to 1.0 when the document is being created. FAMIS automatically increments the item number by one for each additional item you need to enter on the document. Use the decimal position of the item number to represent a text only item for the document.

**Multiple Accounts**
When payment of an item is split across several accounts, each account must be entered separately for that item. Up to 40 accounts may be specified for a single item. Press PF11 to access the multi-account pop-up window where additional accounts may be entered.

Payment by an account may be specified either by dollar amount or percentage of the line item balance. Either the percentage of the line item balance or the amount paid by each account must be entered to process the line item information. The total percentage amounts must equal 100%. It is recommended that percentage be used rather than dollar amounts. If any dollar amount is specified for an account, these amounts are subtracted from the extended price and the percentages are applied to the remaining balance to calculate each account total.

FIELD DESCRIPTIONS

**Action Line**

<table>
<thead>
<tr>
<th>Description</th>
<th>Field Details</th>
<th>Entry Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Doc</td>
<td>7 character/digits</td>
<td>Entry Required</td>
</tr>
<tr>
<td>Identify the requisition document number to add or modify line item information.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Item</td>
<td>4 digits</td>
<td>Entry Required</td>
</tr>
<tr>
<td>Enter the item number to be created or modified</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Screen Information**

<table>
<thead>
<tr>
<th>Description</th>
<th>Field Details</th>
<th>Entry Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quantity</td>
<td>10 digits</td>
<td>Entry Required</td>
</tr>
<tr>
<td>Indicate the purchase quantity of the specified line item.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UOM</td>
<td>4 characters</td>
<td>Entry Required</td>
</tr>
<tr>
<td>Identify the Unit of Measure for the specified line item to be printed on the requisition.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Estimated Unit Price</td>
<td>16 digits</td>
<td>Entry Required</td>
</tr>
<tr>
<td>Include the estimated dollar amount to be paid per unit of measure.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Extended Price</td>
<td>16 digits</td>
<td>Entry Required</td>
</tr>
<tr>
<td>Displays the total item amount as calculated by the system.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Proc Cd</td>
<td>1 character</td>
<td>? Help Available</td>
</tr>
<tr>
<td>Indicate if the item needs special processing (i.e.: vendor discount, trade in, no charge).</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
FIELD DESCRIPTIONS (CONT’D)

Desc: 4 lines (45 characters each)  Entry Required
Identify a detailed description of the specified line item.

Account: 15 digits  Entry Required
Identify the account (subsidiary ledger + support account + object code) responsible for payment.

Pct.: 6 digits  Entry Required
Specify the percentage of the total dollar amount of the line item to be paid by the specified account.

Amt $: 14 digits
Indicate the dollar amount to be paid by the specified account. If a percentage was not specified in the previous field, then the dollar amount to be paid will be required.

More Desc (Y/N): 1 character
Indicate whether or not (‘Y’ or ‘N’) additional lines of description are needed for the specified line item.

More Items (Y/N): 1 character
Signify whether or not (‘Y’ or ‘N’) additional line items are to be processed for the requisition.

Additional Functions

PF5 Next
Next Used to advance to the next screen.

PF9 Notes
Notes Used to enter free-form notes about the requisition.
Note: These are on-line reference notes and will not be printed.

PF10 CAcct
Copy Account
Used to copy account information from the previous item to the current item all dollar amounts are left blank and require either amount or percentage for a new item to be specified.

PF11 MAcct
Multiple Accounts
Used to add as many as forty accounts for a specified item.
Close A Requisition

You should close your requisition after you have entered all of the required information. This prevents further changes from accidentally being made to your requisition. Closing your document will also encumber the funds you have requested to pay for the purchase.

Please Note: You may close and reopen your document multiple times in order to make changes, as long as it has not yet entered the routing and approval system of FAMIS.

Screen 256 - Requisition Document Close

After you enter a pop-up box will appear: make sure you put a “Y”

Type 'Y' to submit to Routing & Approval: y_<enter>
Additional Routing (FYI/FYA) ___

Multiple depts appear on the document header.
Please mark the Dept/SubDept which is to serve as the Creator of the document.

Creator CC Dept/Sub Dept
x 16 PURC <enter>
_ 16 VPBS
BASIC STEPS
☐ Advance to Screen 256.
☐ Type a valid requisition number in the Action Line.
☐ Press <ENTER> to display existing requisition information.
☐ Set the Close Document: flag to ‘Y’ and press <ENTER>.
☐ Indicate whether or not you would like to send the requisition into the routing and approval system of FAMIS
☐ If all required information has been properly entered, the message “Document closed successfully” will appear in the message line.

REQUISITION CLOSE PROCESS
Encumbrance Process
Closing the document generates encumbrances which set aside funds to pay for the requested purchase. All requisitions, except those that set up a blanket order, are encumbered. The encumbrances are established using the 7-digit document ID created when the requisition is entered. The user reference number entered on the header of the requisition will be transferred to the purchase order and the encumbrances. These encumbrances may be viewed on Screens 20, 21, 22, and 26.

FIELD DESCRIPTIONS
Action Line
Doc: 7 character/digits
Identify the document number selected to be closed.

Screen Information
Close 1 character
Document?: Indicate whether or not ('Y' or 'N') the selected document should be closed.

Additional Functions
PF5 Next Advances to the next screen.
PF6 Item Displays the document inquiry pop-up window to view all items for the document.
PF7 Route Document Sends a closed document into the routing and approval process.
PF12 Warns Identifies any FAMIS warnings.
Enter the Sole Source Justification

Requisitions that have been flagged as a sole source purchase will need to have the reason for sole source purchasing recorded. The purpose for the item(s) to be requested, proprietary functions or features, any other companies with similar items, and why they are unsatisfactory will be required on Screen 253. Need for installation and use with other equipment are also indicated on this screen.

If the sole source flag is set to “N” on the document header screens, you will be able to remove the information from this sole source screen. All information must be removed from the screen (including the PF10 pop-up window) or you will receive an error message.

First enter “Y” on screen 250 for sole source; fill out pop-up screen:

```
+-----------------------------------------------+
|                                               |
| Enter reason for Sole Source purchase:        |
| TRADEMARK AND SOLE PROVIDER, NO OTHER___     |
| RESELLERS.______________________________     |
|                                               |
|                                 PF4=Exit      |
+-----------------------------------------------+
```

Screen 253 - Requisition Sole Source

After <entering> a pop up screen will appear to finish sole source information.

```
<< Repair / Replacement Information >>
If this item will be used with existing equipment,
Is it a repair/replacement part? _ (Y/N)
Give Brand and Model number of existing equipment:
```

---
16
---
BASIC STEPS

☐ Advance to Screen 253.
☐ Type a valid requisition number in the Action Line.
☐ Press <ENTER> to display existing document sole source information.
☐ Add or modify information for the questions, as applicable.
☐ Press <ENTER> to record the information.

FIELD DESCRIPTIONS

Action Line

Doc: 7 character/digits
Identify the requisition document number to add or modify sole source justification information.

Screen Information

Is this item required for use in Research?, Classroom?, Lab? Other?
23 characters
Identify the area for which the item is required. Type an “X” in the desired field or include information in the Other field.

List proprietary functions or features.
280 characters
Indicate why the item requested is essential to accomplish your work.

List other companies who manufacture a similar item with similar functions.
140 characters
Enter other manufacturers that may be used to purchase the requested item.

Why won’t these competing products be satisfactory?
210 characters
Include the reason alternate vendors should not be used for the purchase of the requested item.

Will installation be required?
1 character
Identify whether or not (‘Y’ or ‘N’) installation will be required for the requested item.

Will this item be used with existing equipment?
1 character
Indicate whether or not (‘Y’ or ‘N’) the requested item will be used in conjunction with existing equipment.

Additional Functions

PF5 Next
Advances to the next screen.

PF9 Notes
Used to enter on-line notes about the requisition. These will not be printed.

PF10 ExEq
Existing Equipment
Used to enter information about any existing equipment the requested item will be used in conjunction with.
There are many functions you can perform on your requisition that are just not addressed on the main data entry screens. Some of these functions include reopening your requisition, deleting items from your requisition, or even canceling it all together. You may use Screen 258 to perform these general maintenance functions on your requisition.

Screen 258 - Requisition Flag Maintenance

Screen information

- **Cancel / Delete Document:** 1 character
  - Indicate whether or not (‘Y’ or ‘N’) the document should be removed from the system.

- **Reopen Document:** 1 character
  - Specify whether or not (‘Y’ or ‘N’) a document that has been closed should be returned to an open status so that additions and modifications may be processed.

**FIELD DESCRIPTIONS**

**Action Line**

- **Doc:** 7 character/digits
  - Identify the document number on which flags will be set/re-set.
  - Entry Required

**Basic Steps**

- Advance to Screen 258.
- Type a valid requisition number in the Action Line and press <ENTER> to display current requisition flag settings.
- Modify flags as necessary and press <ENTER> to record requisition flag changes.
FIELD DESCRIPTIONS (CONT’D)

Delete/Undelete Item: 5 digits
Enter the specific line item, or the first item in a range of items on the requisition you wish to delete.

thru Item: 5 digits
Identify the specific line item, or the last item in a range of items on the requisition you wish to delete. Note: If you are only deleting a single line item, place the same number in this field as well as the previous field.

Additional Functions

PF7 Track
Shows the action taken on a document.

PF9 Accounts
Identifies the account(s) used. Press PF5 to see if there is any over budget message displayed.

PF10 Document Header Extended Information
Shows extended information for the document.

PF11 Items
Displays the line items on the document.

PF12 Warnings
Identifies any FAMIS warnings on document.
Enter Notes
On A Requisition

You may have an occasion to make a note about your requisition. For example, you may need to note an alternate contact person for the order or a condition that needs to be addressed before the order can be processed. Screen 259 has been provided for you to enter such notes about your requisition. Using this screen, you may enter as many as ninety-nine lines of notes on an open or a closed requisition.

Please Note: Text is entered on this screen without a wrap around feature, so a word may inadvertently be split between two lines. Tabbing will take you to the next available text line.

Screen 259 - Requisition Note Text

<table>
<thead>
<tr>
<th>Screen: Doc: R000995</th>
<th>Item: 0.0</th>
<th>Transferred</th>
</tr>
</thead>
<tbody>
<tr>
<td>line</td>
<td>Line</td>
<td>Description</td>
</tr>
<tr>
<td>1</td>
<td>&gt;&gt;Note entered 04/22/10 BY KING, KANDY K.</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Please call me x3459 before issuing a purchase order</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>so I can review the quotes you get.</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Thank you</td>
<td></td>
</tr>
</tbody>
</table>

Basic Steps

- Advance to Screen 259.
- Type a valid requisition number in the Action Line and press <ENTER> to display existing requisition notes, if any.
- Add or modify requisition text in the available fields and press <ENTER> to record the information.

Requisition Notes Entry Process

Paging Through Text
The F/B/E: field is used to scroll through all of the lines of text added on Screen 259. Entering 'F' will scroll one page forward. Entering 'B' will scroll one page backwards. Entering 'E' will "end" the editing session and take you to the next required requisition screen.
REQUISITION NOTES ENTRY PROCESS (CONT’D)

Viewing Requisition Notes
When notes are attached to document items they can be viewed with the NOTES PF Key indicated at the bottom of the screens. The document header and all items that have notes attached will display the word “NOTE” at the top of the screens.

Header Notes Vs. Item Notes
Using Screen 259, you may enter a note that pertains to the requisition as a whole or you may enter a note that applies only to a selected line item on the requisition. You should use the Item: field on the Action Line to distinguish between line items. To enter a note that pertains to the entire requisition, enter a line item number of zero (0.00).

FIELD DESCRIPTIONS

Action Line
Doc: 7 character/digits
Identify the requisition document number to which you want to add notes.

Item: 4 digits
Indicate the item number to attach the note.

Screen Information
Position at line ___: 3 digits
Identify which line of text should be positioned at the top of the screen.

Line: 3 digits
Specifies a particular line number of the note you have entered.

Description: 99 lines (45 characters each)
Provides an area for you to enter your requisition notes.
Note: There is no word wrap feature.

Page (F/B/E): 1 character
Signify whether to scroll forward (F) or backward (B) through text lines or end (E) the editing session and advance to the next required requisition screen.

Additional Functions
PF7 Previous Item
PItem Allows you to back up to the previous line item.

PF8 Next Item
NItem Allows you to advance to the next line item.
Copy A Document
To A Requisition

You may find it beneficial to copy or transfer frequently purchased items (i.e. general supplies) from existing documents to requisitions. Screen 247 allows you to retrieve a purchasing document previously entered and copy or transfer its line items to an existing or newly created requisition.

Screen 247 - Copy Documents to Requisition

<table>
<thead>
<tr>
<th>Func</th>
<th>Item</th>
<th>----- Desc -----</th>
<th>Quantity</th>
<th>Unit Price</th>
<th>UOM</th>
<th>Ext. Price</th>
<th>Cd</th>
</tr>
</thead>
<tbody>
<tr>
<td>c</td>
<td>1.0</td>
<td>This is for the A</td>
<td>4.00</td>
<td>110.9400</td>
<td>EA</td>
<td>443.76</td>
<td>T</td>
</tr>
<tr>
<td>c</td>
<td>2.0</td>
<td>Model: 2-J9-CLEVN</td>
<td>1.00</td>
<td>112.8400</td>
<td>EA</td>
<td>112.84</td>
<td>M</td>
</tr>
<tr>
<td>c</td>
<td>3.0</td>
<td>Model:X4TS-CLEVND</td>
<td>1.00</td>
<td>160.1600</td>
<td>EA</td>
<td>160.16</td>
<td>D</td>
</tr>
<tr>
<td>c_</td>
<td>4.0</td>
<td>Model:FMH250-FRYM</td>
<td>2.00</td>
<td>193.8400</td>
<td>EA</td>
<td>387.68</td>
<td>N</td>
</tr>
<tr>
<td>c_</td>
<td>5.0</td>
<td>Model: FMH122S</td>
<td>2.00</td>
<td>184.1600</td>
<td>EA</td>
<td>368.32</td>
<td>T</td>
</tr>
<tr>
<td>c_</td>
<td>6.0</td>
<td>Model: A200</td>
<td>1.00</td>
<td>29.0000</td>
<td>EA</td>
<td>29.00</td>
<td>T</td>
</tr>
<tr>
<td>c_</td>
<td>7.0</td>
<td>Model: 84186-1</td>
<td>1.00</td>
<td>44.5000</td>
<td>EA</td>
<td>44.50</td>
<td>T</td>
</tr>
<tr>
<td>c_</td>
<td>8.0</td>
<td>Model: 2612</td>
<td>1.00</td>
<td>47.6600</td>
<td>EA</td>
<td>47.66</td>
<td>T</td>
</tr>
<tr>
<td>c_</td>
<td>9.0</td>
<td>Model:C-13-HATCO</td>
<td>1.00</td>
<td>46.0000</td>
<td>EA</td>
<td>46.00</td>
<td>T</td>
</tr>
<tr>
<td>c_</td>
<td>10.0</td>
<td>Model: 536TG-STAR</td>
<td>1.00</td>
<td>69.8400</td>
<td>EA</td>
<td>69.84</td>
<td>T</td>
</tr>
</tbody>
</table>

**BASIC STEPS**

**Copy Items to a New Requisition**

- Advance to Screen 247.
- Type a valid document number in the Action Line and press <ENTER>.
- Type a valid requisition prefix followed by a zero (0) in the Doc: field and a valid category in the Cat: field.
- Press <ENTER> to view a list of line items available for copy.
- Type a valid function code next to all line items you want to copy and press <ENTER> to copy the items and create the new requisition number.

**Copy/Transfer Requisition Items to an Existing Requisition**

- Advance to Screen 247.
- Type a valid document number in the Action Line and press <ENTER>.
- Type a valid requisition number in the Doc: field and press <ENTER> to view a list of line items available for copy.
- Type a valid function code next to all line items you want to copy.
- Press <ENTER> to copy the selected items.
REQUISITION COPY/TRANSFER PROCESS

Transfer/Copy Functions

There are two distinct functions on this screen. Function “C” allows a line item to be copied to either an existing document or create a new document for the item. Function “T” allows a line item to be transferred to an existing document or create a new document for the item.

When an item is transferred, the transfer is noted in the document tracking system. The encumbrances created for the source document will be liquidated when the “To” document is closed. After transferring, items on the source document cannot be updated. Once a line item has been transferred, it will be marked with an “X” in the “Proc. Cd” column and can only be copied to other documents.

Items that are copied are not tracked and encumbrances for the source document are not liquidated. Copying an item does not affect the ability to update the source item. Only requisitions may be created by this screen.

FIELD DESCRIPTIONS

Action Line

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Doc:</td>
<td>7 character/digits Entry Required</td>
</tr>
<tr>
<td></td>
<td>Enter the desired requisition document number.</td>
</tr>
<tr>
<td>Item:</td>
<td>4 digits</td>
</tr>
<tr>
<td></td>
<td>Indicate the item number to position on the first line of the display.</td>
</tr>
<tr>
<td>From Vendor:</td>
<td>25 characters</td>
</tr>
<tr>
<td></td>
<td>Provides the name of the vendor from which the items were originally purchased.</td>
</tr>
<tr>
<td>From Doc FY:</td>
<td>4 digits</td>
</tr>
<tr>
<td></td>
<td>Identifies the fiscal year in which the original purchase document was created.</td>
</tr>
<tr>
<td>New Doc:</td>
<td>7 character/digits Entry Required</td>
</tr>
<tr>
<td></td>
<td>Identify the document prefix followed by a zero (0) that instructs FAMIS to automatically assign a new requisition number.</td>
</tr>
<tr>
<td>or</td>
<td></td>
</tr>
<tr>
<td>Existing Doc:</td>
<td>7 character/digits Entry Required</td>
</tr>
<tr>
<td></td>
<td>Include the existing requisition number you wish to copy items to.</td>
</tr>
<tr>
<td>FY:</td>
<td>4 digits</td>
</tr>
<tr>
<td></td>
<td>Indicate the fiscal year items are purchased in.</td>
</tr>
<tr>
<td></td>
<td>The default is the current system fiscal year.</td>
</tr>
<tr>
<td>Cat.:</td>
<td>2 characters ? Help Available</td>
</tr>
<tr>
<td></td>
<td>Enter the document category that defines the accounting and receiving characteristics.</td>
</tr>
<tr>
<td>Dt:</td>
<td>8 digits</td>
</tr>
<tr>
<td></td>
<td>Indicates the date the new requisition or purchase order is created. Will default to the current system date if left blank.</td>
</tr>
</tbody>
</table>
FIELD DESCRIPTIONS (CONT’D)

Screen information

Header Screen: 1 character
Type ‘Y’ if the system should advance to header of the new document after line items are copied.

Func: 1 character ? Help Available
Identify the function to be taken: items should be copied (C) from the source document to the new or existing document specified or leave blank if no action to be taken.

Item: 5 digits
Indicates the item number to be copied.

Desc: 20 characters
Shows a short description of the line item.

Quantity: 9 digits
Identifies the purchase quantity of the line item.

Unit Price: 11 digits
Indicates the line item price per unit of measure.

UOM: 3 characters
Shows the Unit of Measure for the line item.

Ext. Price: 12 digits
Reflects the total extended price of the item, as computed by the system.

Proc Cd: 1 character
Indicates if the processing code for the requisition, if the requisition needs special processing or if it has been transferred to a Purchase Order.

Additional Functions

PF 11 Additional Departments
AdDpt Allows the addition of 10 extra departments/sub-departments that will have approval and accounts on this document.
Document Inquiry
Basic Concepts

**Inquiry Access**

Access to any particular document depends on a number of factors. For example, your user security must match certain data on the document you wish to view in order for it to be displayed on the screen. With the exception of TAMU, most users will only be able to access documents for their individual department.

**Positioning the Display**

Several document inquiry screens allow you to position a particular document at the top of the inquiry screen. This is accomplished by entering as much information on the Action Line as possible. For example, entering a particular document number on the Action Line of Screen 280 will display that document on the first informational line of the listing.

**Document Classes**

Classes are used to group documents by function. Placing a question mark (?) in the Class: field and pressing <ENTER> will access a pop-up window with a complete listing of valid document classes. Type an ‘X’ next to the desired class and press <ENTER> to return to the document inquiry screen. Press PF4 to return to the inquiry screen without selecting a document class. Valid values are:

<table>
<thead>
<tr>
<th>M</th>
<th>VALUES MEANING</th>
</tr>
</thead>
<tbody>
<tr>
<td>B</td>
<td>BID</td>
</tr>
<tr>
<td>L</td>
<td>LIMITED PURCH</td>
</tr>
<tr>
<td>P</td>
<td>PURCHASE ORDER</td>
</tr>
<tr>
<td>R</td>
<td>REQUISITION</td>
</tr>
</tbody>
</table>

Field: PD-CLASS
Select a Value or Press <PF4> to Quit

**Using the PF Keys**

The PF keys are used to provide additional information about a particular document. In order to view information about a document using the PF keys, you must first select it for display. To select a document, move the cursor to the desired line by tabbing or by using your arrow keys. Then press the PF keys to display additional information as desired.
Document Browse

Screen 280 is a useful screen that displays all purchasing documents created, and shows the status in the routing and approval process. Users may limit the selection displayed by typing a document class type in the Class: field. For example, if you want to view only Limited Purchase documents, type 'L' in this field.

PF keys have been added to the bottom of this screen to provide additional information about each document.

BASIC STEPS

☐ Advance to Screen 280.
☐ Type a valid document class in the Class: field on the Action Line.
☐ Press <ENTER> to view a complete list of all documents for the specified class.
☐ Type an 'X' in the SL: (select) column to the left of a document to advance to Screen 278, where detailed document information will be displayed.

FIELD DESCRIPTIONS

Action Line

Class: 1 character  ? Help Available
Enter the class of document to inquire on. The system will default the search to the first defined class.

Doc: 7 character/digits
Identify the first document number to be displayed.
FIELD DESCRIPTIONS (CONT’D)

Screen Information

SL: Type an ‘X’ to select a document for display on Screen 278.

CL: 1 character
Identifies the class of the document: requisition (R), purchase order (P), master order (M), bid (B), exempt purchase (E), or limited purchase (L).

NT: 1 character
An asterisk (*) indicates whether or not notes are attached to the document.

Doc: 7 character/digits
Identifies document numbers for the class of document specified.

Vendor Name: 18 characters
Identifies the vendor name.

Date: 6 digits
Indicates the date the document was set-up on the system.

User Ref: 14 digits/characters
Displays the user reference which is used to indicate the subsidiary ledger (SL) account number used for the order followed by the departmental reference number.

Buy: 3 characters
Displays the initials of the buyer for the document, as defined by the system.

Amount: 10 digits
Indicates the total dollar amount of all line items for the document.

St: 3 characters
Indicates the status of the specified document. Common document status codes include:
- CL = Closed
- CO = Completed
- FR = Frozen
- IP = In Process
- TR = Transferred
- PRT = Printed
- DL = Deleted
**FIELD DESCRIPTIONS (CONT’D)**

**Additional Functions**

<table>
<thead>
<tr>
<th>PF KEYS</th>
<th>FIELD DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>PF 5 Invc</td>
<td>Invoice Used to view the invoice details.</td>
</tr>
<tr>
<td>PF 6 Recv</td>
<td>Receive View the receiving information associated with the selected document.</td>
</tr>
<tr>
<td>PF 7 Audit</td>
<td>Audit Information View the audit information for the selected document.</td>
</tr>
<tr>
<td>PF 8 Accts</td>
<td>Accounts Shows the account distribution used for the document selected.</td>
</tr>
<tr>
<td>PF 9 PIP</td>
<td>PIP Shows the PIP documents.</td>
</tr>
<tr>
<td>PF 10 Headr</td>
<td>Header Shows the document header information that was entered when the document was created.</td>
</tr>
<tr>
<td>PF 11 Items</td>
<td>Items Lists the line item information for the document.</td>
</tr>
<tr>
<td>PF 12 Track</td>
<td>Track Allows you to track the routing history of the selected document.</td>
</tr>
</tbody>
</table>
Document Browse By Department

Browsing information on requisitions and purchase orders by the department and sub-department is accomplished using Screen 281. This screen displays those documents that are currently incomplete (have not been paid) by default. However, you can also specify that only completed documents are displayed.

Screen 281 - Document Browse By Dept/SubDept

<table>
<thead>
<tr>
<th>SCN</th>
<th>Doc</th>
<th>Buy Vendor Name</th>
<th>Date</th>
<th>S-Dept</th>
<th>Amount</th>
<th>St</th>
</tr>
</thead>
<tbody>
<tr>
<td>-</td>
<td>P * P901712 PKF DONAWAY STOCK SUPPLIES</td>
<td>12/03/08</td>
<td>DL</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>-</td>
<td>P * P902269 MEY XERON CORP</td>
<td>01/13/09</td>
<td>3,211.92</td>
<td>PRT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>-</td>
<td>P * P902375 AGC VTR INTERNATIONAL</td>
<td>01/21/09</td>
<td>DL</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>-</td>
<td>P * P902615 SAP VTR INTERNATIONAL INC</td>
<td>02/03/09</td>
<td>51,707.88</td>
<td>PRT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>-</td>
<td>P P902961 SAP VTR INTERNATIONAL INC</td>
<td>02/20/09</td>
<td>2,378.38</td>
<td>PRT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>-</td>
<td>P * P903168 VJE XERON CORP</td>
<td>03/04/09</td>
<td>DL</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>-</td>
<td>P * P903210 MEY XERON CORP</td>
<td>03/05/09</td>
<td>38,402.18</td>
<td>PRT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>-</td>
<td>P P903212 MEY XERON CORPORATION</td>
<td>03/05/09</td>
<td>15,456.00</td>
<td>PRT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>-</td>
<td>P * P903213 MEY XERON CORPORATION</td>
<td>03/05/09</td>
<td>10,408.68</td>
<td>PRT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>-</td>
<td>P * P905045 LFS UNIVERSAL WINDOWS</td>
<td>06/24/09</td>
<td>12,149.10</td>
<td>PRT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>-</td>
<td>P * P905073 MEY XERON CORP</td>
<td>06/24/09</td>
<td>7,933.68</td>
<td>PRT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>-</td>
<td>P P905119 MEY XERON CORPORATION</td>
<td>06/25/09</td>
<td>6,116.76</td>
<td>PRT</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

FIELD DESCRIPTIONS

**Action Line**

- **Dept:** 5 characters
  - Help Available
  - Entry Required
  - Identify the department for which you want to browse documents.

- **SubDept:** 5 characters
  - Indicate the sub-department to be included in the display.

- **Class:** 1 character
  - Help Available
  - Enter the class of document to inquire on.

- **Doc:** 7 character/digits
  - Identify the first document number to be displayed.

- **Completed Docs:** 1 character
  - Enter 'Y' to include completed documents in the display.
FIELD DESCRIPTIONS (CONT'D)

Screen Information

SL: 1 character
Type an 'X' to select a document for display on Screen 278.

CL: 1 character
Identifies the class of the document: requisition (R), purchase order (P),
master order (M), bid (B), exempt purchase (E), or limited purchase (L).

NT: 1 character
An asterisk (*) indicates notes are attached to the document.

Doc: 7 character/digits
Identifies document numbers for the class of document specified.

Buy: 3 characters
Displays the initials of the buyer for the document, as defined by the system.

Vendor Name: 18 characters
Identifies the vendor's name.

Date: 6 digits
Indicates the date the document was set-up on the system.

S-Dept: 5 characters
Identifies the sub-department on the document.

Amount: 10 digits
Shows the total dollar amount of all line items for the document.

St: 3 characters
Indicates the status of the specified document. Common
document status codes include: completed (CO), closed (CL),
and in process (IP).

Additional Functions

PF 5 Invoice
Invc
Used to view the invoice details.

PF 6 Receive
Recv
View the receiving information associated with the selected document.

PF 7 Audit Information
Audit
View the audit information for the selected document.

PF 8 Accounts
Accts
Shows the account distribution used for the document selected.

PF 9 PIP
PIP
Shows the PIP documents.

PF 10 Header
Headr
Shows the document header information that was entered when the
document was created.

PF 11 Items
Items
Lists the line item information for the document.

PF 12 Track
Track
Allows you to track the routing history of the selected document.
Document Browse By Account

FAMIS allows you to browse through purchase documents, sorted by their buying account, fiscal year, and campus code using Screen 282. This screen automatically displays incomplete documents (those that have not been paid).

If you wish to view all completed documents, type “Y” in the Completed Docs: field.

Screen 282 - Document Browse by Account

BASIC STEPS

☐ Advance to Screen 282.
☐ Type a valid document class and account number on the Action Line.
☐ Type additional data in the available fields, if desired, and press <ENTER> to view a complete list of all documents for the specified account and document class.
☐ Type an ‘X’ in the SL: (select) column to the left of a document to advance to Screen 278, where detailed document information will be displayed.

FIELD DESCRIPTIONS

Action Line

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Class:</td>
<td>1 character</td>
</tr>
<tr>
<td>Acct:</td>
<td>11 digits</td>
</tr>
<tr>
<td>Acct CC:</td>
<td>2 characters</td>
</tr>
<tr>
<td>Acct FY:</td>
<td>4 digits</td>
</tr>
<tr>
<td>Doc:</td>
<td>7 character/digits</td>
</tr>
<tr>
<td>Completed Docs:</td>
<td>1 character</td>
</tr>
<tr>
<td>Acct CC:</td>
<td>2 characters</td>
</tr>
</tbody>
</table>

Entry Required
### FIELD DESCRIPTIONS (CONT'D)

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acct FY:</td>
<td>4 digits&lt;br&gt;Identify the fiscal year for the documents to be displayed. This will default to the current fiscal year unless otherwise specified.</td>
</tr>
<tr>
<td>Doc:</td>
<td>7 character/digits&lt;br&gt;Type the first document number to be displayed at the top.</td>
</tr>
<tr>
<td>Completed Docs:</td>
<td>1 character&lt;br&gt;Enter 'Y' to include completed documents in the display.</td>
</tr>
</tbody>
</table>

**Screen Information**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SL:</td>
<td>1 character&lt;br&gt;Type an 'X' to select a document for display on Screen 278.</td>
</tr>
<tr>
<td>CL:</td>
<td>1 character&lt;br&gt;Identifies the class of the document: requisition (R) purchase order (P) Bid (B), or limited purchase (L).</td>
</tr>
<tr>
<td>NT:</td>
<td>1 character&lt;br&gt;An asterisk (*) indicates notes are attached to the document.</td>
</tr>
<tr>
<td>Doc:</td>
<td>7 character/digits&lt;br&gt;Identifies document numbers for the class of document specified.</td>
</tr>
<tr>
<td>Supp Acct:</td>
<td>5 digits&lt;br&gt;Identifies the Support Account purchasing the items.</td>
</tr>
<tr>
<td>Vendor Name:</td>
<td>16 characters&lt;br&gt;Identifies the vendor name.</td>
</tr>
<tr>
<td>Date:</td>
<td>6 digits&lt;br&gt;Indicates the date the document was set-up on the system.</td>
</tr>
<tr>
<td>User Ref:</td>
<td>14 digits/characters&lt;br&gt;Shows the user reference which is used to indicate the subsidiary ledger (SL) account number used for the order followed by the departmental reference number.</td>
</tr>
<tr>
<td>Amount:</td>
<td>8 digits&lt;br&gt;Indicates the total dollar amount of all line items for the document.</td>
</tr>
<tr>
<td>St:</td>
<td>3 characters&lt;br&gt;Shows the status of the specified document: completed (CO), closed (CL) or in process (IP).</td>
</tr>
</tbody>
</table>

**Additional Functions**

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PF 5</td>
<td>Invoice&lt;br&gt;Used to view the invoice details.</td>
</tr>
<tr>
<td>PF 6</td>
<td>Receive&lt;br&gt;View the receiving information associated with the selected document.</td>
</tr>
<tr>
<td>PF 7</td>
<td>Audit Information&lt;br&gt;View the audit information for the selected document.</td>
</tr>
<tr>
<td>PF 8</td>
<td>Accounts&lt;br&gt;Shows the account distribution used for the document selected.</td>
</tr>
<tr>
<td>PF 9</td>
<td>PIP&lt;br&gt;Shows the PIP documents.</td>
</tr>
<tr>
<td>PF 10</td>
<td>Header&lt;br&gt;Shows the document header information that was entered when the document was created.</td>
</tr>
<tr>
<td>PF 11</td>
<td>Items&lt;br&gt;Lists the line item information for the document.</td>
</tr>
<tr>
<td>PF 12</td>
<td>Track&lt;br&gt;Allows you to track the routing history of the selected document.</td>
</tr>
</tbody>
</table>
**Document Browse By User Reference**

The user reference field is used to group documents by account. The first six digits typically represent the subsidiary ledger account number that will be charged for the purchase(s). This is generally followed by a hyphen and the departmental reference number, assigned to uniquely identify the document.

The user reference number may be used to trace purchase documents from requisition to payment. You may browse purchasing documents on-line, sorted by their user reference number using Screen 284.

**Screen 284 - Document Browse by User Reference (Panel 1)**

<table>
<thead>
<tr>
<th>L L T</th>
<th>User Ref</th>
<th>Doc</th>
<th>Vendor Name</th>
<th>Date</th>
<th>Buy</th>
<th>Amount</th>
<th>St</th>
</tr>
</thead>
<tbody>
<tr>
<td>_ L</td>
<td>120005-DKS</td>
<td>L001328</td>
<td>12/17/09</td>
<td></td>
<td></td>
<td></td>
<td>DL</td>
</tr>
<tr>
<td>_ L</td>
<td>120005-DKS</td>
<td>L901416</td>
<td>06/30/09</td>
<td></td>
<td></td>
<td></td>
<td>DL</td>
</tr>
<tr>
<td>_ L</td>
<td>120005-DKS</td>
<td>L902218</td>
<td>08/14/09</td>
<td></td>
<td></td>
<td></td>
<td>IP</td>
</tr>
<tr>
<td>_ P</td>
<td>120005-DKS</td>
<td>P000001</td>
<td>XEROX CORPORATIO</td>
<td>08/10/09 DKS</td>
<td>3,412.32</td>
<td>CL</td>
<td></td>
</tr>
<tr>
<td>_ P</td>
<td>120005-DKS</td>
<td>P000002</td>
<td>XEROX CORPORATIO</td>
<td>08/10/09 DKS</td>
<td>2,044.56</td>
<td>CL</td>
<td></td>
</tr>
<tr>
<td>_ P</td>
<td>120005-DKS</td>
<td>P000003</td>
<td>XEROX CORPORATIO</td>
<td>08/10/09 DKS</td>
<td>2,637.84</td>
<td>CL</td>
<td></td>
</tr>
<tr>
<td>_ P</td>
<td>120005-DKS</td>
<td>P000004</td>
<td>XEROX CORPORATIO</td>
<td>08/10/09 DKS</td>
<td>2,044.56</td>
<td>CL</td>
<td></td>
</tr>
<tr>
<td>_ P</td>
<td>120005-DKS</td>
<td>P000005</td>
<td>XEROX CORPORATIO</td>
<td>08/10/09 DKS</td>
<td>3,137.52</td>
<td>CL</td>
<td></td>
</tr>
<tr>
<td>_ P</td>
<td>120005-DKS</td>
<td>P000006</td>
<td>XEROX CORPORATIO</td>
<td>08/10/09 DKS</td>
<td>2,143.80</td>
<td>CL</td>
<td></td>
</tr>
<tr>
<td>_ P</td>
<td>120005-DKS</td>
<td>P000007</td>
<td>XEROX CORPORATIO</td>
<td>08/10/09 DKS</td>
<td>4,766.48</td>
<td>CL</td>
<td></td>
</tr>
<tr>
<td>_ P</td>
<td>120005-DKS</td>
<td>P000008</td>
<td>XEROX CORPORATIO</td>
<td>08/10/09 DKS</td>
<td>2,044.56</td>
<td>CL</td>
<td></td>
</tr>
<tr>
<td>_ P</td>
<td>120005-DKS</td>
<td>P000009</td>
<td>XEROX CORPORATIO</td>
<td>08/10/09 DKS</td>
<td>775.80</td>
<td>CL</td>
<td></td>
</tr>
</tbody>
</table>

**FIELD DESCRIPTIONS**

**Action Line**

- **User Ref:** 14 digits/characters
  - Identify the user reference number to be displayed at the top of the list.

- **Include:** 1 character
  - ? Help Available

- **Only Class:** Enter the class of document to inquire on.

**Screen Information**

- **SL:** 1 character
  - Type an ‘X’ to select a document for display on Screen 278.

- **CL:** 1 character
  - Identifies the class of the document: requisition (R), purchase order (P), bid (B) or limited purchase (L).
FIELD DESCRIPTIONS (CONT'D)

**NT:** 1 character
An asterisk (*) indicates notes are attached to the document.

**User Ref:** 14 digits/characters
Displays the user reference that is used to indicate the subsidiary ledger (SL) account number used for the order followed by the departmental reference number.

**Doc:** 7 character/digits
Identifies document numbers for the class of document specified.

**Vendor Name:** 16 characters
Identifies the vendor name.

**Date:** 6 digits
Indicates the date the document was set-up on the system.

**Buy:** 3 characters
Displays the initials of the buyer for the document.

**Amount:** 13 digits
Indicates the total dollar amount of all line items for the document.

Additional Functions

<table>
<thead>
<tr>
<th>PF</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>Invoice</td>
</tr>
<tr>
<td>Inv</td>
<td>Used to view the invoice details.</td>
</tr>
<tr>
<td>6</td>
<td>Receive</td>
</tr>
<tr>
<td>Recv</td>
<td>View the receiving information associated with the selected document.</td>
</tr>
<tr>
<td>7</td>
<td>Audit Information</td>
</tr>
<tr>
<td>Audit</td>
<td>View the audit information for the selected document.</td>
</tr>
<tr>
<td>8</td>
<td>Accounts</td>
</tr>
<tr>
<td>Accts</td>
<td>Shows the account distribution used for the document selected.</td>
</tr>
<tr>
<td>9</td>
<td>PIP</td>
</tr>
<tr>
<td>PIP</td>
<td>Shows the PIP documents.</td>
</tr>
<tr>
<td>10</td>
<td>Header</td>
</tr>
<tr>
<td>Headr</td>
<td>Shows the document header information that was entered when the document was created.</td>
</tr>
<tr>
<td>11</td>
<td>Items</td>
</tr>
<tr>
<td>Items</td>
<td>Lists the line item information for the document.</td>
</tr>
<tr>
<td>12</td>
<td>Track</td>
</tr>
<tr>
<td>Track</td>
<td>Allows you to track the routing history of the selected document.</td>
</tr>
</tbody>
</table>
Document Browse By Vendor

To find a document when the best information you have available is the name of the vendor, use Screen 285. This is a good choice when a vendor calls for information about a purchase. This screen automatically displays incomplete documents (those that have not been paid).

To view completed documents, type “Y” in the Completed Docs: field.

Screen 285 - Document Browse by Vendor

BASIC STEPS

☐ Advance to Screen 285.
☐ Type the vendor identification number or name and document class on the Action Line.
☐ Type additional data in the available fields, as desired.
☐ Press <ENTER> to view a complete list of all documents for the specified vendor and document class.
☐ Type an ‘X’ in the SL: (select) column to the left of a document to advance to Screen 278, where detailed document information will be displayed.

FIELD DESCRIPTIONS

**Action Line**

Vendor: 11 digits ? Help Available Entry Required
Enter the desired FAMIS vendor identification number.

Class: 1 character ? Help Available
Identify the class of document to inquire on.

Doc: 7 character/digits
Enter the first document number to be displayed.

Completed Docs: 1 character
Type ‘Y’ to include completed documents in the display.

All Mail Codes: 1 character
Enter ‘Y’ to display all documents for the vendor.
FIELD DESCRIPTIONS (CONT’D)

**Screen Information**

**SL:** 1 character
Type an ‘X’ to select a document for display on Screen 278.

**CL:** 1 character
Identifies the class of the document: requisition (R), purchase order (P), bid (B), or limited purchase (L).

**NT:** 1 character
An asterisk (*) indicates notes are attached to the document.

**Doc:** 7 character/digits
Identifies document numbers for the class of document specified.

**First Dept:** 5 characters
Shows the first department listed on the document header.

**Doc Summary:** 11 characters
Displays a brief summary description of the document header.

**Buy:** 3 characters
Displays the initials of the buyer for the document.

**Date:** 6 digits
Indicates the date the document was set-up on the system.

**User Ref:** 11 digits/characters
Displays the user reference used to identify the subsidiary ledger (SL) account number for the order followed by the departmental reference number.

**Amount:** 10 digits
Indicates the total dollar amount of all line items for the document.

**St:** 3 characters
Shows the status of the specified document: completed (CO), closed (CL) or in process (IP).

**Additional Functions**

**PF 5  Invc Inv**
Used to view the invoice details.

**PF 6  Receive**
View the receiving information associated with the selected document.

**PF 7  Audit Information**
View the audit information for the selected document.

**PF 8  Accounts**
Shows the account distribution used for the document selected.

**PF9 PIP**
Shows the PIP documents.

**PF 10 Header**
Shows the document header information that was entered when the document was created.

**PF 11 Items**
Lists the line item information for the document.

**PF 12 Track**
Allows you to track the routing history of the selected document.
Browse Documents Closed
But Not Routed

There are many steps along the line to getting a purchase document paid. Sometimes the only thing holding up the payment of a document is that it has not received the proper approvals because it was never sent into the on-line routing and approval system. Screen 271 is available for you to display your documents that have been closed, but that have not been sent into the routing and approval system.

Screen 271 - Documents Closed But Not Routed

<table>
<thead>
<tr>
<th>S C N</th>
<th>Doc</th>
<th>Buy</th>
<th>Vendor Name</th>
<th>User Ref.</th>
<th>Date</th>
<th>S-Dept</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>_ L</td>
<td>L002663</td>
<td>CONCEPCION MARIA*</td>
<td>156003NC</td>
<td>04/15/10</td>
<td>287.80</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

BASIC STEPS

☐ Advance to Screen 271.

☐ Type the desired department code on the Action Line. Enter the SubDept code if you wish to include it in the list to be displayed.

☐ Press <ENTER> to view a complete list of all documents in your department/sub-department that have been closed but not routed.

☐ Type an 'X' in the SL: field to select a document and advance to Screen 278, where detailed information will be displayed.

FIELD DESCRIPTIONS

**Action Line**

<table>
<thead>
<tr>
<th>Dept:</th>
<th>5 characters</th>
<th>? Help Available</th>
<th>Entry Required</th>
</tr>
</thead>
</table>

Enter the department whose documents you would like to display.

<table>
<thead>
<tr>
<th>SubDept:</th>
<th>5 characters</th>
<th>? Help Available</th>
<th>Entry Required</th>
</tr>
</thead>
</table>

Identify the sub-department whose documents you would like to display.

<table>
<thead>
<tr>
<th>Class:</th>
<th>1 character</th>
<th>? Help Available</th>
</tr>
</thead>
</table>

Enter the class of document to inquire on.

<table>
<thead>
<tr>
<th>Doc:</th>
<th>7 character/digits</th>
</tr>
</thead>
</table>

Identify the first document number to be displayed.
FIELD DESCRIPTIONS (CONT’D)

Screen Information

SL: 1 character
Type an ‘X’ to select a document for display on Screen 278.

CL: 1 character
Identifies the class of the document: requisition (R), purchase order (P),
bid (B), or limited purchase (L).

NT: 1 character
An asterisk (*) indicates there are notes attached to the document.

Doc: 7 character/digits
Identifies document numbers for the class of document specified.

Buy: 3 characters
Displays the initials of the buyer for the purchase document.

Vendor Name: 18 characters
Identifies the name of the vendor the items were purchased from.

User Ref.: 11 digits/characters
Displays the user reference which is used to identify the subsidiary ledger (SL)
account number used for the order followed by the departmental reference number.

Date: 6 digits
Indicates the date the document was set-up on the system.

S-Dept: 5 characters
Displays the sub-department associated with the purchase document.

Amount: 10 digits
Indicates the total dollar amount of all line items for the document.

Additional Functions

PF 5 Invoice
Used to view the invoice details.

PF 6 Receive
View the receiving information associated with the selected document.

PF 7 Audit Information
View the audit information for the selected document.

PF 8 Accounts
Shows the account distribution used for the document selected.

PF 10 Header
Shows the document header information that was entered when the document was created.

PF 11 Items
Lists the line item information for the document.

PF 12 Track
Allows you to track the routing history of the selected document.
Document Inquiry

When the document number is known, the most comprehensive information available may be viewed using Screen 278. You may also advance to Screen 278 after selecting a document for display from one of the other document inquiry screens.

To see more information on a specific line item, select the item and the system will advance to Screen 279 for that document line item.

Screen 278 - Document Inquiry (Panel 1)

Screen 278 - Document Inquiry (Panel 2)

If the Proc Cd: field is left blank, the document matches and Completes when all items are received. An “M” means there can be multiple invoices so the document will not automatically finalize.

Screen 278 - Document Inquiry (Panel 2)
Screen 278 - Document Inquiry (Panel 3)

278 Document Inquiry 04/26/10 4:46PM
FY 2010 CC 16

Screen: ___  Document: P000042
< More  Panel: 03
Doc Summary: CC 20 INITIAL LEASE/INITIAL ORDER
Vendor: 11604680202 XEROX CORPORATION
Reimburse ID:  Doc FY: 2010  Doc Amt: 848.16
User Ref: 120005-KDS  Status: CL  Amnt Inv: 494.55
Doc Date: 08/10/2009  Route St: FN  Amnt Vchr: 494.55
Class: P  Oth A/P Src:  Inv Forced:
Category: R2  USAS Doc Type:  2 Req Delivery Date: 09/01/2009
Nbr Invoices: 7  Catalogue Order:  Delg:  Contact: DEBRA SEGOWIA
Doc Date: 08/10/2009  Route St: FN  Amt Vchr: 494.55
Class: P  Oth A/P Src:  Inv Forced:
Category: R2  USAS Doc Type:  2 Req Delivery Date: 09/01/2009
Nbr Invoices: 7  Catalogue Order:  Delg:  Contact: DEBRA SEGOWIA

INV
S Line   UOM  Description   P  Quantity  Amount  Remaining
_  1.0 MO  Xerox CC20  (Firs M  7.00  452.55  323.25
_  2.0 MO  WCM201 Upgrade to M  7.00  42.00  30.36
_  3.0 EA  Base Unit Up to 22 N  1.00  0.00

*** End of line items ***
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---

BASIC STEPS

☐ Advance to Screen 278.
☐ Enter the document number to be displayed and press <ENTER> to retrieve
document information. Each line item is listed at the bottom of the screen.
☐ Type an "X" next to the line item or position the cursor in the S (select) field and press
<ENTER> to advance to Screen 279 where detailed information will be provided.

FIELD DESCRIPTIONS

Action Line
Document: 7 character/digits
Entry Required
Identify the document number to be displayed.

Screen Information
Panel 1
Doc Summary: 50 characters/digits
Displays a description of the document selected.
Vendor: 11 digits/30 characters
Displays the identification number and name of the vendor.
Reimburse ID: 11 characters/digits
Shows the ID number of the individual who is being reimbursed
for items already purchased.
Doc FY: 4 digits
Indicates the fiscal year in which the document is processed.
Doc Amt: 15 digits
Displays the total dollar amount for document.
User Ref: 14 digits
Shows the user reference that is used to identify the subsidiary ledger
(SL) account number for the order followed by the departmental reference number.
Status: 2 characters
Indicates the status activity level of the document. For example:
process (IP), closed (CL), deleted (DL), and completed (CO).
Amt Inv: 15 digits
Shows total dollar amount invoiced for document.
**FIELD DESCRIPTIONS (CONT’D)**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Doc Date:</td>
<td>8 digits</td>
</tr>
<tr>
<td></td>
<td>Identifies the <em>date</em> the <em>document</em> was <em>processed</em> by the system.</td>
</tr>
<tr>
<td>Route St:</td>
<td>2 characters</td>
</tr>
<tr>
<td></td>
<td>Displays a purchasing <em>document’s status</em> in the Routing and Approval System.</td>
</tr>
<tr>
<td>Amt Vchr:</td>
<td>15 digits</td>
</tr>
<tr>
<td></td>
<td>Shows the <em>total dollar amount vouched</em></td>
</tr>
<tr>
<td>Class:</td>
<td>1 character</td>
</tr>
<tr>
<td></td>
<td>Identifies the <em>class code</em> of the document.</td>
</tr>
<tr>
<td>Oth A/P Src:</td>
<td>2 characters</td>
</tr>
<tr>
<td></td>
<td>Shows any additional <em>accounts payable source</em>.</td>
</tr>
<tr>
<td>Inv Forced:</td>
<td>1 character</td>
</tr>
<tr>
<td></td>
<td>‘Y’ indicates an <em>invoice has been forced</em> for the document selected.</td>
</tr>
<tr>
<td>Category:</td>
<td>2 characters</td>
</tr>
<tr>
<td></td>
<td>Defines the accounting and receiving <em>category</em> characteristics of the document.</td>
</tr>
<tr>
<td>Req Delivery Date:</td>
<td>8 digits</td>
</tr>
<tr>
<td></td>
<td>Displays the <em>date items were requested to be delivered</em>.</td>
</tr>
<tr>
<td>LP Received:</td>
<td>10 digits</td>
</tr>
<tr>
<td></td>
<td>Indicates whether or not good/services were received for a <em>limited purchase</em></td>
</tr>
<tr>
<td></td>
<td>before it was closed/routed. If the items were <em>received</em>, the date they were</td>
</tr>
<tr>
<td></td>
<td>received will be displayed.</td>
</tr>
<tr>
<td>Buyer:</td>
<td>20 characters/digits</td>
</tr>
<tr>
<td></td>
<td>Displays the <em>buyer’s name</em> for the document, and phone extension if available.</td>
</tr>
<tr>
<td>Nbr Invoices:</td>
<td>3 digits</td>
</tr>
<tr>
<td></td>
<td>Indicates the <em>number of invoices that have been processed</em> for the document.</td>
</tr>
<tr>
<td>Contact:</td>
<td>15 characters</td>
</tr>
<tr>
<td></td>
<td>Shows <em>name of the person to contact</em>.</td>
</tr>
<tr>
<td>S:</td>
<td>1 character</td>
</tr>
<tr>
<td></td>
<td>Type an ‘X’ to <em>select</em> a line item for display on Screen 279.</td>
</tr>
<tr>
<td>Line:</td>
<td>3 digits</td>
</tr>
<tr>
<td></td>
<td>Shows the line item for the specified document.</td>
</tr>
<tr>
<td>Quantity:</td>
<td>10 digits</td>
</tr>
<tr>
<td></td>
<td>Identifies the <em>purchase quantity</em> of line item.</td>
</tr>
<tr>
<td>UOM:</td>
<td>3 characters</td>
</tr>
<tr>
<td></td>
<td>Represents the <em>unit of measure</em> for line item.</td>
</tr>
<tr>
<td>Description:</td>
<td>25 characters</td>
</tr>
<tr>
<td></td>
<td>Displays a brief <em>description</em> of line item.</td>
</tr>
<tr>
<td>Unit Price:</td>
<td>10 digits</td>
</tr>
<tr>
<td></td>
<td>Displays the dollar <em>amount to be paid per unit of measure</em>.</td>
</tr>
<tr>
<td>Extended Price:</td>
<td>10 digits</td>
</tr>
<tr>
<td></td>
<td>Indicates the <em>total item amount</em> as <em>calculated</em> by the system.</td>
</tr>
</tbody>
</table>
FIELD DESCRIPTIONS (CONT’D)

Panel 2

Received: 10 digits
Shows the quantity of items received.

Date Recvd: 8 digits
Identifies the date the line item was received.

Invoiced: 10 digits
Displays the quantity of items invoiced.

Date Invcd: 8 digits
Signifies the date the line item was invoiced.

Matched: 10 digits
Indicates the quantity of matched items.

Date Mtchd: 8 digits
Shows the date the line item was matched.

Panel 3

INV UOM: 4 characters
Identifies the invoiced unit of measure. This field is filled in each time an invoice posting occurs to this line. It comes from Screen 342. Each subsequent posting will overly this value.

Paid Quantity: 10 digits
Shows the quantity paid.

Paid Amount: 10 digits
Shows the amount paid.

Remaining Balance: 10 digits
Identifies the remaining amount to be paid.

Additional Information

PF 5 Invc
Invoice
Used to view the invoice details.

PF 6Recv
Receive
View the receiving information.

PF8 Accts
Shows the account distribution used.
Document Line Item Inquiry

Detailed information for line items may be viewed on Screen 279. This is a detailed follow up screen from Screen 278.

This screen is helpful in determining if an item has passed the three-way match requirement in order to be paid. It displays the date an item was received, invoiced, and matched.

Screen 279 - Document Line Item Inquiry

> Use PF7 to view all invoices against the item that is currently being displayed on the screen. The information in the pop-up window will display a total of all invoices at the end of the list of invoices.

> The pop-up window allows the user to view all invoices except cancelled invoices. There is also an option to look at all completed invoices.

Screen 279 – PF7 Invoice Detail

> **BASIC STEPS**

- Most of the time you will reach this screen by selecting an item on Screen 278.
- However, if you want to view a line item on a specific document, advance to Screen 279.
- Type the document and item number you want to display on the Action Line and press <ENTER> to view the detailed line item information.
## Field Descriptions

### Action Line

**Document:** 7 character/digits
- Identify the desired document to be displayed.

**Item: ___ of ___:** 4 digits
- Indicate the item number to be displayed. The default is the first item.

### Screen Information

**Vendor:** 11 digits/30 characters
- Displays the identification number and name of the vendor from which items are purchased.

**User Ref:** 14 digits/characters
- Displays the user reference that is used to identify the subsidiary ledger (SL) account number for the order, followed by the departmental reference number.

**Item UOM:** 3 characters
- Shows the unit of measure for the line item.

**Item Qty:** 10 digits
- Identifies the purchase quantity of the line item.

**Item Unit Price:** 12 digits
- Displays the dollar amount to be paid per unit of measure.

**Item Discount:** 5 digits
- Identifies the discount percentage for the line item.

**Item Ext Price:** 12 digits
- Indicates the total extended item amount, as calculated by the system.

**Item Proc Cd:** 1 character
- Code that indicates any special processing needs for the document.

**Commodity Code:** 5 digits
-Displays the commodity code for classifying goods and services.

**First Account:** 15 digits
- Identifies the first FAMIS account for this document.

**Cost Ref 1, 2, 3:** 7 characters
- Identifies the user-defined cost accounting reference which provides additional details about the processing of the line item.

**Item Desc:** 50 characters/digits
- Displays a short description of the line item purchased.
FIELD DESCRIPTIONS (CONT'D)

**Received, Invoiced, Matched**

**UOM:** 3 characters
Represent the **unit of measure** for the specified line item.

**Dt:** 8 digits
Indicates the **date** the item was received, invoiced, and/or matched.

**Qty:** 10 digits
Identifies the purchase **quantity** of the specified line item received, invoiced, or matched.

**Additional Information**

**PF KEYS**
See the Appendix for an explanation of the standard PF Keys.

**PF7**
**InDtl**
Displays detailed invoice information about the document.

**PF8**
**Accts**
Identifies the **accounts** used to pay for the selected item.

**PF11**
**Idesc**
Place cursor on line item and press this key to see detailed description of the item.
Document Tracking Inquiry

Document activity may be monitored using Screen 290. This screen is used to track actions that are performed on a particular document and tell what user last took action on the document. Press ENTER to scroll through the list, or type a document number on the Action Line to advance to the number specified. If the document number is not known, but you know the class of document, you may type the document number prefix and press ENTER to view all documents for the class specified.

Screen 290 - Document Tracking Inquiry

<table>
<thead>
<tr>
<th>290 Document Tracking Inquiry</th>
<th>09/11/09 4:35PM</th>
</tr>
</thead>
<tbody>
<tr>
<td>Screen: Doc: P900007</td>
<td>FY 2010 CC 02</td>
</tr>
<tr>
<td>C L Document Item To To To Item Action Action Date Time By User</td>
<td></td>
</tr>
<tr>
<td>- -------- ----- - ------ ----- -------- -------- ----- --------</td>
<td></td>
</tr>
<tr>
<td>P P900007 CREATE 05/09/08 09:55 ENGV02P</td>
<td></td>
</tr>
<tr>
<td>P P900007 CLOSED 05/09/08 10:23 K702YM</td>
<td></td>
</tr>
<tr>
<td>P P900007 COMPLETE 07/07/09 11:26 K702YM</td>
<td></td>
</tr>
<tr>
<td>P P900008 CREATE 05/12/08 09:57 K702ZY</td>
<td></td>
</tr>
<tr>
<td>P P900008 CLOSED 05/12/08 10:00 K702ZY</td>
<td></td>
</tr>
<tr>
<td>P P900008 1.0 P P000106 1.0 TRNSFR 07/22/09 08:54 WAA02P</td>
<td></td>
</tr>
<tr>
<td>P P900008 2.0 P P000106 2.0 TRNSFR 07/22/09 08:54 WAA02P</td>
<td></td>
</tr>
<tr>
<td>P P900009 CREATE 05/13/08 09:27 BUJU02P</td>
<td></td>
</tr>
<tr>
<td>P P900009 CLOSED 05/13/08 15:10 K702YM</td>
<td></td>
</tr>
<tr>
<td>P P900009 0.1 M M900062 0.1 TRNSFR 05/21/08 14:24 BUJU02P</td>
<td></td>
</tr>
<tr>
<td>P P900009 1.0 M M900062 1.0 TRNSFR 05/21/08 14:24 BUJU02P</td>
<td></td>
</tr>
<tr>
<td>P P900010 CREATE 05/15/08 11:26 MORC02P</td>
<td></td>
</tr>
</tbody>
</table>

More records - Press ENTER to scroll
Enter-PF1-----PF2----PF3----PF4----PF5----PF6----PF7----PF8----PF9----PF10--PF11--PF12---
Hmenu  Help  EHelp

BASIC STEPS

- Advance to Screen 290.
- Type a valid document number on the Action Line to display it at the top of the list.
- Press <ENTER> to view a complete list of all documents.

FIELD DESCRIPTIONS

**Action Line**

- **Doc:** 7 character/digits
  - Entry Required
  - Enter the document number to be displayed.

**Screen Information**

- **CL:** 1 character
  - Identifies the class of the document: requisition (R), purchase order (P), master order (M), bid (B), or limited purchase (L).

- **Doc:** 7 character/digits
  - Identifies the document number for the class of document specified.

- **Item:** 3 digits
  - Shows the number of line items on the document.

- **To CIs:** 1 character
  - Identifies the class of document the document item was transferred to.

- **To Document:** 7 character/digits
  - Displays the document number the item was transferred to.

- **To Item:** 3 digits
  - Identifies the item number on the document it was transferred to.
FIELD DESCRIPTIONS (CONT'D)

Action: 7 characters
Designates the type of action that was taken against the document.

Action Date: 6 digits
Shows the date the action was performed on the document.

Screen Information

CL: 1 character
Identifies the class of the document: requisition (R), purchase order (P), master order (M), bid (B) or limited purchase (L).

Doc: 7 character/digits
Identifies the document number for the class of document specified.

Item: 3 digits
Shows the number of line items on the document.

To Cls: 1 character
Identifies the class of document the document item was transferred to.

To Document: 7 character/digits
Displays the document number the item was transferred to.

To Item: 3 digits
Identifies the item number on the document it was transferred to.

Action: 7 characters
Designates the type of action that was taken against the document.

Action Date: 6 digits
Shows the date the action was performed on the document.

Action Time: 4 digits
Displays the time the action was performed on the document.

By User: 8 characters/digits
Indicates the user ID of the person performing the action on the document.
Document Tracking Cross Reference

FAMIS allows you to cross reference a document from its original source document. Cross references for purchasing documents may be viewed using Screen 291. The “To Document” number is created when items are transferred on the “From Document.”

If a PO or LPO document completes normally, no tracking record is created and you will not see these documents displayed on this screen.

If a purchase order is completed by using the flag on Screen 228 or Screen 242, then a tracking record will appear on Screen 291.

Screen 291 - Document Tracking Cross Reference

<table>
<thead>
<tr>
<th>C</th>
<th>To Document</th>
<th>To Item</th>
<th>From Cls</th>
<th>From Document</th>
<th>Action</th>
<th>Action Date</th>
<th>Action Time</th>
<th>By User</th>
</tr>
</thead>
<tbody>
<tr>
<td>P</td>
<td>P900012 1.0</td>
<td>R</td>
<td>-</td>
<td>R900084</td>
<td>TRNSFR</td>
<td>05/19/08</td>
<td>09:16</td>
<td>TENFO2P</td>
</tr>
<tr>
<td>P</td>
<td>P900012 1.1</td>
<td>R</td>
<td>R900084</td>
<td>1.1 TRNSFR</td>
<td>05/19/08</td>
<td>09:16</td>
<td>TENFO2P</td>
<td></td>
</tr>
<tr>
<td>P</td>
<td>P900012 2.0</td>
<td>R</td>
<td>R900084</td>
<td>2.0 TRNSFR</td>
<td>05/19/08</td>
<td>09:16</td>
<td>TENFO2P</td>
<td></td>
</tr>
<tr>
<td>P</td>
<td>P900013 0.1</td>
<td>R</td>
<td>R803603</td>
<td>0.1 TRNSFR</td>
<td>05/20/08</td>
<td>09:38</td>
<td>KUBK02P</td>
<td></td>
</tr>
<tr>
<td>P</td>
<td>P900013 1.0</td>
<td>R</td>
<td>R803603</td>
<td>1.0 TRNSFR</td>
<td>05/20/08</td>
<td>09:38</td>
<td>KUBK02P</td>
<td></td>
</tr>
<tr>
<td>P</td>
<td>P900013 2.0</td>
<td>R</td>
<td>R803603</td>
<td>2.0 TRNSFR</td>
<td>05/20/08</td>
<td>09:38</td>
<td>KUBK02P</td>
<td></td>
</tr>
<tr>
<td>P</td>
<td>P900013 3.0</td>
<td>R</td>
<td>R803603</td>
<td>3.0 TRNSFR</td>
<td>05/20/08</td>
<td>09:38</td>
<td>KUBK02P</td>
<td></td>
</tr>
<tr>
<td>P</td>
<td>P900013 4.0</td>
<td>R</td>
<td>R803603</td>
<td>4.0 TRNSFR</td>
<td>05/20/08</td>
<td>09:38</td>
<td>KUBK02P</td>
<td></td>
</tr>
<tr>
<td>P</td>
<td>P900013 5.0</td>
<td>R</td>
<td>R803603</td>
<td>5.0 TRNSFR</td>
<td>05/20/08</td>
<td>09:38</td>
<td>KUBK02P</td>
<td></td>
</tr>
<tr>
<td>P</td>
<td>P900013 6.0</td>
<td>R</td>
<td>R803603</td>
<td>6.0 TRNSFR</td>
<td>05/20/08</td>
<td>09:38</td>
<td>KUBK02P</td>
<td></td>
</tr>
<tr>
<td>P</td>
<td>P900013 7.0</td>
<td>R</td>
<td>R803603</td>
<td>7.0 TRNSFR</td>
<td>05/20/08</td>
<td>09:38</td>
<td>KUBK02P</td>
<td></td>
</tr>
</tbody>
</table>

BASIC STEPS

☐ Advance to Screen 291.
☐ Enter the document number on the Action Line to display it at the top of the list and press <ENTER>.

FIELD DESCRIPTIONS

**Action Line**

<table>
<thead>
<tr>
<th>Doc: 7 character/digits</th>
<th>Entry Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter the document number to be displayed.</td>
<td></td>
</tr>
</tbody>
</table>

**Screen Information**

| CL: 1 character |
| Shows the class of document: requisition (R), purchase order (P), master order (M), bid (B), or limited purchase (L). |

| To Document: 7 character/digits |
| Displays the document number the item was transferred to. |

| To Item: 3 digits |
| Identifies the item number on the document it was transferred to. |

| From Cls: 1 character |
| Identifies the class of document the document item was transferred from. |

| From Document: 7 character/digits |
| Identifies the document number from which the item was transferred. |
FIELD DESCRIPTIONS (CONT'D)

From Item: 3 digits
Identifies the item number on the document from which the item was transferred.

Action: 7 characters
Designates the type of action that was taken against the document.

Action Date: 6 digits
Date the action was performed on the document.

Action Time: 4 digits
Time the action was performed on the document.

By User: 8 characters/digits
Indicates the user ID of the person performing the action on the document.
Document In-Box

The document In-Box displays all the documents awaiting your action. Documents listed on this screen may be there because they:

- are on a routing desk on which you serve as a primary assignee, or
- have been forwarded to you specifically for approval or review, or
- have been referenced back to you as the creator.

When someone routes or re-routes a document, they have the ability to send the document as an “FYI” or “FYA” to an additional person or desk. This allows the submitter to route the document for additional approval before the document goes to the next desk or signer desk.

Documents will appear in the following order:

1. FRA/FYA documents. This will include any documents (including “rejects” and “recalls”) routed to an individual.
2. All Desk routed documents
3. Information/Notification copies of documents.

Within each of these groups, the documents are displayed in document-ID order.

**IMPORTANT NOTE:**

The PF keys and some of the fields displayed on Routing & Approvals screens WILL BE DIFFERENT DEPENDING OF THE TYPE OF DOCUMENT YOU ARE VIEWING. For example, a PIP document will display differently than a BID document.

Also, if you don’t have approval authority for a particular document, you WILL NOT SEE the Action: field on the Cover Sheet.
### SECTION I – MAIN SCREEN

#### Screen 910 - Document In-Box (Panel 1)

<table>
<thead>
<tr>
<th>Sel</th>
<th>Document ID</th>
<th>FY</th>
<th>Submitted by</th>
<th>Submitted</th>
<th>Arrived</th>
<th>CC</th>
<th>Unit</th>
<th>Action</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>_</td>
<td>PLPAML400008</td>
<td>2004</td>
<td>JENSEN, JULIE J</td>
<td>03/27/2000</td>
<td>04/18/2000</td>
<td>SA</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>_</td>
<td>PRQSAR000024</td>
<td>2000</td>
<td>JENSEN, JULIE J</td>
<td>03/27/2000</td>
<td>04/03/2003</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>_</td>
<td>PRQSAR100001</td>
<td>2001</td>
<td>JENSEN, JULIE J</td>
<td>11/21/2000</td>
<td>04/03/2003</td>
<td>SA</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*** End of List 12 Document(S) Found ***

#### Screen 910 - Document In-Box (Panel 2)

<table>
<thead>
<tr>
<th>Sel</th>
<th>Document ID</th>
<th>FY</th>
<th>Submitted by</th>
<th>Submitted</th>
<th>Arrived</th>
<th>CC</th>
<th>Unit</th>
<th>Action</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>_</td>
<td>PLPAML400008</td>
<td>2004</td>
<td>JENSEN, JULIE J</td>
<td>03/27/2000</td>
<td>04/18/2000</td>
<td>SA</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>_</td>
<td>PRQSAR000024</td>
<td>2000</td>
<td>JENSEN, JULIE J</td>
<td>03/27/2000</td>
<td>04/03/2003</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>_</td>
<td>PRQSAR100001</td>
<td>2001</td>
<td>JENSEN, JULIE J</td>
<td>11/21/2000</td>
<td>04/03/2003</td>
<td>SA</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*** End of List 12 Document(S) Found ***
DOCUMENT IN-BOX PROCESS

Positioning the Display

The Document, Office and Desk fields can be used to filter the display of documents shown on the screen. For example, if you type "PRQ*" in the Document: field on the Action Line, the screen will display all the requisition documents in your In-Box. Press PF11 to scroll to the right and view additional information.

If you wish to view documents on desks where you serve as a substitute, you would go to Screen 911, key in the name for a primary approver on the desk and press <ENTER>.

BASIC STEPS

Approving or Rejecting Documents

☐ Advance to Screen 910.
☐ Press <ENTER> to scroll through documents in your in-box.
☐ Type an 'X' next to all documents you would like to approve and press PF8.
-OR-
☐ Press PF9 to select all of the documents in your in-box..
☐ This will bring up the Routing Document Information Pop-Up Window.
☐ Type APP in the Action: field, type ‘Y’ in the pop-up box to confirm that you would like to approve the document and press <ENTER>.
BASIC STEPS (CONT’D)

☐ If you are rejecting a document, type REJ in the Action: field, enter the reason that you are rejecting the document in the pop-up window provided and press <ENTER> to return the document to its creator.

☐ This will return you to the Routing Document Information window. Press PF5 to move to the next document requiring action or press PF4 to return to Screen 910.

FIELD DESCRIPTIONS

**Action Line**

- **Document:** 12 characters/digits
  - Enter the document number, if known, or leave blank to display all documents.
  - You can also use wildcards to search for types of documents (for example: PP*).

- **Office:** 10 characters
  - Enter the title of the electronic office for the documents awaiting action. Must be used in conjunction with the Desk: field.

- **Desk:** 10 characters
  - Type the name of the desk where the documents are awaiting action. Must be used in conjunction with the Office: field.

- **Approvals Only:** 1 character
  - Indicate whether or not (‘Y’ or ‘N’) you wish to display only items that need to be approved.

**Screen Information**

Panel 1

- **Sel:** 1 character
  - Type an ‘X’ in this field and press PF8 to select a document for further review.

- **Document ID:** 12 characters/digits
  - Displays the document identifier used in routing and approval; consists of the form (3 characters) + the campus code (2 digits) + the document number (7 characters).

- **N:** 1 character
  - An '*' indicates that routing notes are attached to the document.

- **Doc Summary:** 40 characters/digits
  - Displays a short description taken from the original document.

- **Requested Action:** 11 characters
  - Identifies the action that needs to be taken on the document.

- **Status:** 14 characters
  - Shows a document’s progress through the routing and approval system.

Panel 2

- **FY:** 4 digits
  - Indicates the fiscal year that the document was created.

- **Submitted by:** 21 characters
  - Displays the name of the person who submitted the document for routing and approval.

- **Submitted:** 8 digits
  - Identifies the date the document was submitted for routing and approval.

- **Arrived:** 8 digits
  - Shows the date the document arrived at the In-Box.
FIELD DESCRIPTIONS (CONT'D)

Current

Unit: 10 characters
Identifies the current department/sub-department in which the document is being routed.

Panel 3

Current

Office: 10 characters
Displays the current office the document is being routed through.

Desk: 10 characters
Indicate the current desk/PID the document is awaiting action from.

View: 10 characters
Displays the name of the view where a person has approval authority on a signer or creator desk. This is only applicable to signer/creator desks.

Additional Functions

PF6 Discard
Discd
Discards the selected document(s) from the in-box.

PF7 Routing History
RHist
Displays the routing history of the document and shows who has seen it.

PF8 Select
Sel
Selects the document that you have chosen with an ‘X’ and displays the Routing Document Information pop-up window.

PF9 Select All Documents
All
Selects all the documents in your In-Box and displays the routing document information pop-up window. The documents are displayed sequentially.
**Document In-Box By Name**

If you are a substitute on an approval desk, you will not receive documents directly to your document In-Box (displayed on Screen 910).

To see the documents at a desk where you are a substitute, advance to Screen 911 and enter the name of the desk’s **primary assignee** and press enter. The name search will allow you to choose the correct person and display this person’s In-Box. The documents in the In-Box which are on desks that you are assigned to will be accessible. Others will be protected and you may not select them.

Security element “10” allows security officers, and certain members of the Purchasing Office/Fiscal Office to have viewing access to the cover sheet and all routing documents on Screens 911 and 913 in order to provide assistance in resolving routing and approval problems.

**SECTION I – MAIN SCREEN**

Documents will appear in the following order:

1. FRA/FYA documents. This will include any documents routed to an individual. Rejects and Recalls fall into this category.
2. All Desk routed documents
3. Information/Notification copies of documents.

Within each of these groups the documents are displayed in document-ID order.

**Screen 911 - Document In-Box by Name (Panel 1)**

<table>
<thead>
<tr>
<th>Sel</th>
<th>Document ID</th>
<th>Doc Summary</th>
<th>Action</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>EBRSA0001911</td>
<td>EBR: Janice Jones PIN: Sxxxx3</td>
<td>Ntfy/Signed</td>
<td>In Proc Rt</td>
</tr>
<tr>
<td></td>
<td>PLPSAL400089</td>
<td>* OFFICE SUPPLIES</td>
<td></td>
<td>Final</td>
</tr>
<tr>
<td></td>
<td>PQPSAR400022</td>
<td>** This is Linda's In-Box **</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>PLPSAL400090</td>
<td>PE</td>
<td></td>
<td>Final</td>
</tr>
<tr>
<td></td>
<td>EBRSA0001915</td>
<td>EBR: Roger Reese - Wage Position</td>
<td></td>
<td>Final</td>
</tr>
<tr>
<td></td>
<td>EBRSA0001917</td>
<td>EBR: Vacant PIN: Sxxxx6</td>
<td></td>
<td>Final</td>
</tr>
</tbody>
</table>

*** End of List 6 Document(S) Found ***

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
Hmenu Help EHemp Discd RHist Sel All Left Right
EWRSA0001915
Position at line:

1 The following people have seen this document:
2 Submitted 11/04/04 10:18 LAWRENCE, LINDA L (979-458-6111)
3 Signed 06/23/08 09:55 PETERS, PAULA P (979-458-6222)
4 Approved 06/23/08 10:05 PETERS, PAULA P (979-458-6222)
5 This document is currently in CC SA office PAYROLLWS
6 on desk BUDGET-1 - Arrival Date: 06/23/2008 10:05
7 Desk workers are:
8 DOLAN, DUKE D (979-458-6110)
10 JONES, JAMES J (979-458-6452)
12 STRALEY, STARLA S (979-458-6460)
13 The following people have an Info/Notify copy of this document:
14 Info 06/23/08 09:55 LAWRENCE, LINDA L **Voided**
15
PF4=Exit PF7=Bck PF8=Fwd
**BASIC STEPS**

**Approving or Rejecting Documents**

- Advance to Screen 911.
- Press <ENTER> to scroll through documents in the in-box.
- Type an ‘X’ next to all documents you would like to approve and press PF8.

**-OR-**

- Press PF9 to select all of the documents in your inbox.
- This will bring up the Routing Document Information Pop-Up Window.
- Type APP in the Action: field, type ‘Y’ in the pop-up box to confirm that you would like to approve the document and press <ENTER>.

- If you are rejecting a document, type REJ in the Action: field, enter the reason that you are rejecting the document in the pop-up window provided and press <ENTER> to return the document to its creator.

- This will return you to the Routing Document Information window. Press PF5 to move to the next document requiring action or press PF4 to return to Screen 911.
The document Out-Box displays all the documents that you have taken action on and lists them in order of the date the action was taken. You can filter the data by using the Date From and Date To fields. Finished documents are included in the list displayed by typing ‘Y’ in the Include Finished: field or to exclude them, type ‘N’.

### Screen 912 - Document Out-Box (Panel 1)

<table>
<thead>
<tr>
<th>Sel</th>
<th>Document ID</th>
<th>Doc Summary</th>
<th>Status</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>PLPAML400006* CANDY FOR HALLOWEEN</td>
<td>Final</td>
<td>Discarded</td>
<td></td>
</tr>
<tr>
<td></td>
<td>PLPAML400008* COFFEE</td>
<td>Rejected</td>
<td>Submitted</td>
<td></td>
</tr>
<tr>
<td></td>
<td>PLPAML400006* CANDY FOR HALLOWEEN</td>
<td>Final</td>
<td>Submitted</td>
<td></td>
</tr>
<tr>
<td></td>
<td>PBDAMB000003 FURNITURE FOR BUYERS</td>
<td>Cancelled</td>
<td>Cancelled</td>
<td></td>
</tr>
<tr>
<td></td>
<td>PLPSAL000030 LEATHER CHAIR</td>
<td>Cancelled</td>
<td>Discard/Cncl</td>
<td></td>
</tr>
<tr>
<td></td>
<td>PLPAML000305* OFFICE FURNITURE</td>
<td>Cancelled</td>
<td>Discard/Cncl</td>
<td></td>
</tr>
<tr>
<td></td>
<td>PLPSAL000022 NET DIALOG</td>
<td>Final(CO)</td>
<td>Deleted</td>
<td></td>
</tr>
<tr>
<td></td>
<td>PBDAMB000143 CHEMICALS</td>
<td>In Dept Rt</td>
<td>Approved</td>
<td></td>
</tr>
<tr>
<td></td>
<td>PRQSAR100004 RENTAL OF KEROX COPIER 1090 FOR 9/</td>
<td>In Proc Rt</td>
<td>Approved</td>
<td></td>
</tr>
<tr>
<td></td>
<td>PRQSAR100006 COMPUTER MONITOR FOR JULIE JONES</td>
<td>In Proc Rt</td>
<td>Approved</td>
<td></td>
</tr>
</tbody>
</table>

*** End of List 10 Document(S) Found ***

### Screen 912 - Document Out-Box (Panel 2)

<table>
<thead>
<tr>
<th>Sel</th>
<th>Document ID</th>
<th>Action Date/Time</th>
<th>Form Name</th>
<th>FY</th>
<th>Submitted by</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>PLPAML400006</td>
<td>06/07/2007 11:19</td>
<td>LIMITED PRCH</td>
<td>2004</td>
<td>CARSON, CARLA C</td>
</tr>
<tr>
<td></td>
<td>PLPAML400008</td>
<td>11/13/2006 15:01</td>
<td>LIMITED PRCH</td>
<td>2004</td>
<td>CARSON, CARLA C</td>
</tr>
<tr>
<td></td>
<td>PLPAML400006</td>
<td>11/13/2006 14:57</td>
<td>LIMITED PRCH</td>
<td>2004</td>
<td>CARSON, CARLA C</td>
</tr>
<tr>
<td></td>
<td>PBDAMB000003</td>
<td>03/04/2004 14:53</td>
<td>BID</td>
<td>2000</td>
<td>TEERS, YOLANDA Y</td>
</tr>
<tr>
<td></td>
<td>PLPSAL000030</td>
<td>01/13/2004 17:04</td>
<td>LIMITED PURC</td>
<td>2000</td>
<td>CARSON, CARLA C</td>
</tr>
<tr>
<td></td>
<td>PLPAML000305</td>
<td>12/15/2003 14:11</td>
<td>LIMITED PURC</td>
<td>2000</td>
<td>CARSON, CARLA C</td>
</tr>
<tr>
<td></td>
<td>PLPSAL000022</td>
<td>07/13/2001 00:00</td>
<td>LIMITED PURC</td>
<td>2000</td>
<td>CARSON, CARLA C</td>
</tr>
<tr>
<td></td>
<td>PLPAML100143</td>
<td>12/08/2000 14:11</td>
<td>LIMITED PURC</td>
<td>2001</td>
<td>CARSON, CARLA C</td>
</tr>
<tr>
<td></td>
<td>PRQSAR100004</td>
<td>11/21/2000 15:53</td>
<td>REQUISITION</td>
<td>2001</td>
<td>CARSON, CARLA C</td>
</tr>
<tr>
<td></td>
<td>PRQSAR100006</td>
<td>11/21/2000 15:52</td>
<td>REQUISITION</td>
<td>2001</td>
<td>CARSON, CARLA C</td>
</tr>
</tbody>
</table>

*** End of List 10 Document(S) Found ***
Screen 912 - Document Out-Box (Panel 3)

BASIC STEPS

☐ Advance to Screen 912.

☐ Optionally, complete the Action Line information to limit the display to a specific type of document and press <ENTER> to display all of the documents that you have take action on.

ROUTING PROCESS

Browsing Your Out-Box
The current status and location of a document and when it arrived there can be checked using your out-box.

Various pop-up screens are available using the PF keys at the bottom of the screen. To access this information, type an ‘X’ in the Sel field or position the cursor anywhere on the line of the desired document and press the PF key that indicates the information/action you want. For example, pressing PF8 will display a pop-up window with document routing information about the document, whereas PF7 will display routing history information.

FIELD DESCRIPTIONS

Action Line
Document: 12 characters
Enter the routing document number to be positioned on the first line of the display.
FIELD DESCRIPTIONS (cont’d)

Include Finished: 1 character
Indicate whether or not ('Y' or 'N') to view documents that have completed routing.

Actions From: 8 digits
The default is 1 month back, but this can be changed to view documents within a specified date range.

Thru: 8 digits
The default is 1 month back, but this can be changed to limit the date range when displaying documents.

Screen Information
Panel 1
Sel: 1 character
Type 'X' to select documents one at a time.

Entry Required
Document ID: 12 characters/digits
Displays the document identifier used in routing and approval; it consists of the Form (3 characters), the Campus Code (2 digits), and the Document Number (7 characters).

N: 1 character
An '*' indicates routing notes are attached to the document.

Doc Summary: 39 characters
Displays a short description taken from entry of the original document.

Status: 14 characters
Identifies the status of the document as it relates to the user:

Action: 14 characters
Shows the last action taken on the document in the routing process.

Panel 2
Action Date/Time: 12 digits
Identifies the date and time document was sent to the Out-Box.

Form Name 12 characters
Indicates whether the document is a requisition, a purchase order, a limited purchase order, or an exempt purchase order.

FY: 4 digits
Shows the fiscal year for the document.
FIELD DESCRIPTIONS (CONT’D)

Submitted by: 21 characters
Displays the name of the person who submitted the document for approval.

Panel 3
Submitted: 8 digits
Identifies the date the document was submitted for approval.

Finished: 1 character
Indicates whether the document has finished the routing process.

Additional Functions
PF KEYS
See the Additional Functions for Panel 1 and the Appendix for explanation of the standard PF keys.

PF5 Recal Recall the Document
Recall the document back to your In-Box. This is valid for only the creator of the document and the last person who approved the document.

PF7 RHist Routing History
Displays routing history of the selected document.

PF8 Sel Select
Selects the document that you have chosen with an ‘X’ and displays the Routing Document Information pop-up window.

PF9 Notes Routing Notes
Displays routing notes on the document.
Document Route History

The history of a document’s routing is available online on Screen 914. Each line is numbered along with a description of the action taken on the document.

**Screen 914 - Document Routing History**

<table>
<thead>
<tr>
<th>Ln</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>The following people have seen this document:</td>
</tr>
<tr>
<td>3.</td>
<td>Approved 09/08/09 10:43 HARRIS, HENRY H (979-845-0168)</td>
</tr>
<tr>
<td>4.</td>
<td>Approved 09/08/09 15:55 LINDSEY, LEONA L (979-845-4563)</td>
</tr>
<tr>
<td>5.</td>
<td>Signed 09/08/09 16:04 MILLER, MARK M (979-845-0182)</td>
</tr>
<tr>
<td>6.</td>
<td>The following people have an Info/Notify copy of this document:</td>
</tr>
</tbody>
</table>

**BASIC STEPS**

- Advance to Screen 914.
- Type a valid document number on the Action Line and press <ENTER> to display the routing history and press <ENTER> to scroll through the display, if necessary.

**ROUTING PROCESS**

**Positioning the Display**

The Position at Line: field can be used to position the screen at a particular line number. This will aid in bringing history items into view on the same screen.

PF7 and PF8 keys allow you to page forward and backwards through the displayed list.

**Information Displayed on Screen 914**

Actions cancelled by a later “reject” or “recall” of the document are shown with “voided” in the phone number area of the display.

The date and time of the action taken on the specified document have been added to this screen.

**Action Line**

- **Document:** 12 characters/digits
  Identify the desired document number to display the routing history. The document id consists of the: Form + Campus Code + Document Number.

- **Position at line:** 2 digits
  Indicate the line number to be positioned at the top of the screen.

**Screen Information**

- **Ln:** 2 digits
  Sequential line numbers to identify historical actions.

- **Description:** 50 characters/digits
  Describes the specific actions taken on the selected document.