Creating a Purchase Requisition

1. Open the Buyers WorkBench
   a. If the PO is to be created from a PREQ, Navigate to the Requisitions tab
   b. Query the selected PREQ
   c. Select the Check box to the left
   d. Select the Create PO... Button to the right
   e. Select YES on the pop-up

2. The Purchase Order form is opened
   a. Tab through the PO number field to let FAMIS assign the number
   b. Type in a description
   c. Select a purchase type based on the following choices
      i. INVENTORY – Used for Standard Inventory purchases
      ii. INV_BL – used for a one time set up for a blanket PO
      iii. INV_REL – used when releasing materials against a blanket PO
      iv. PCARD – used when using P-Card on PO
      v. SERVICE – used for standard service purchases
      vi. SERVICE_BL – used for one time set-up of blanket PO for services
      vii. SERVICE_REL – used when releasing services against a blanket PO
   d. Select the Lines tab
      i. View each line to verify that the right quantity and price is displayed
      ii. Add an additional line if necessary
      iii. Verify that the status of each line is PLACED
   e. Return to the General Tab

3. Once all the information is correct, change the PO status to PLACED. This will be done once the PO has been sent to the vendor
   a. Note that items will not be able to be received against the PO unless the status is in PLACED
   b. Press SAVE

4. A purchase order has now been successfully placed, the next step is to receive these parts into inventory once they are delivered
FAMIS XiR3 Documentation
Creating a Purchase Order

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Receipt of Items

1. Navigate to the Receipt of Item by PO form
   a. Insert the PO number against which you are receiving the shipment
   b. Press enter and the PO information will populate
   c. Press enter again and the parts for that PO will populate
   d. In the Receipt Date field, type in the date that these materials are received
   e. In the Qty Received field, type in the quantity that was received
   f. Press OK
   g. The parts have now been received, verify by returning to the PARTS form and notice the increase in inventory
The Final Step in the Process is to Invoice the vendor

1. Enter the PO number
   a. If this is entered correctly, the PO information will automatically populate
2. Enter the invoice number
3. Enter the Invoice amount
4. Switch to the Line Items tab to verify that the information is correct
   a. Select the check box next to the lines
5. Select the Inventory PO check box if applicable
6. Press Save
7. Verify that the status has changed to MATCHED
8. This completes the Generate PO, Receipt of Item and Invoicing processes