



# HOW TO PURCHASE

# REVIEW OF STEPS TO PLACING AN ORDER

1. Research the parts/service you need.
2. You need a work order number.
3. Create purchase requisition (preq).
4. Send any quotes, justification, etc. to Materials Management.
5. Once preq is approved and required paperwork verified, Materials Management will place the order.



# **BIGGEST MISCONCEPTION**

- **That a preq means you have authority to order the part/have vendor come for service.**
- **WRONG** – a preq is a request to order the part or service. It still has to go through the approval process and get placed on a purchase order.
- Violations of this policy mean that we must send the preq to the Director and then to the SAVP to sign along with a reason why the policy was not followed.
- Exception is if it was an emergency.



# APPROVAL LIMITS

- Every employee has an approval limit in Famis
  - Mechanic, Administrative - \$0
  - Supervisor/Planner Scheduler - \$5,000
  - Manager - \$25,000
  - Assistant Director/Business Manager - \$100,000
  - Director - \$250,000
  - SAVP - \$500,000
  - Even after preq has been approved in Famis by all parties, if over \$25,000 it still has to go through an approval process in Materials Management as a second check.

# Emergency Vs Rush

- Emergency

- You had to call in a vendor for service or order the part without having a PO# first.
- Example – a flood at night.
- Preq must be done the next business day.

- Rush

- You need the part or service ordered right away.
- Rush should be the first word in the description field on the preq line for each item so Materials Management knows to process it first.



# GENERAL RULES REVIEW

- 1) Must have a PO# before ordering any part or service. You cannot verbally order something or use the preq# as your order (unless it is an emergency).
- 2) Have clear and complete description – i.e. do not just put “per quote” – must list details. If you have spoken to someone at the vendor, note it.
- 3) Cannot split job into multiple preq’s.
- 4) Must be an approved vendor.
- 5) Only one part per line on the preq.

# Creating A Preq

- There are 2 options to get to the Purchase Requisition Form 1<sup>st</sup> - Start on work order form

The screenshot shows a 'Work Order' window with the following details:

- WO Number:** R876472
- Description:** DECALS FOR 2019 RAV4
- Parent WO:** (empty)
- Tabs:** Main, Attributes, Tasks, Crews, Parts, Tools, PO's, Routing, Readings, Closing. The 'PO's' tab is highlighted with a blue arrow.
- Asset Section:** Asset Class, Equipment, Print, Library buttons.
- General Information:** Type: ROUTINE, Priority: 4, Method, Assigned To, Outage Class.
- Current Status / Dates:** Status: CLOSED, Material Status, Start Date: 12/29/2022, Due Date: 1/8/2023, Completed: 1/25/2023.
- Tracking 1, 2, Non-Available, Travel Time:** Input fields.
- Primary Labor:** Crew: MAT MGMT, Craft, Crew Size, Est Hrs, Current Est Hrs.
- Location:** Site: RC, Building, Floor, Room, Zone.
- Buttons:** Request, Related WO, Create WO, Billing, Estimates, Dates, Audit..., Conv to Proj...
- Checkboxes:** Print Ticket On Next Batch Run (checked).

Click on PO tab

# Click Orders Button

The screenshot shows a software window titled "Work Order" with a standard Windows-style title bar (minimize, maximize, close buttons). The window contains the following elements:

- WO Number:** R876472
- DECALS FOR 2019 RAV4** (text in a field)
- Parent WO:** (empty field)
- Navigation Tabs:** Main, Attributes, Tasks, Crews, Parts, Tools, PO's, Routing, Readings, Closing. The "PO's" tab is currently selected.
- Reference:** (empty field)
- Orders:** A button with a blue arrow pointing to it from the right.
- General Information:**
  - Amount: (empty field)
  - PREQ Number: (empty field)
  - PREQ Date: (empty field)
  - PO Number: (empty field)
  - PO Date: (empty field)
- Record Dates:**
  - Entered: (empty field) By: (empty field)
  - Modified: (empty field) By: (empty field)
- Vendor:** (empty field)
- Requirements:** (empty text area)



# Click Create Preq

The screenshot shows the 'Orders' window in the FAMIS Xi application. The window title is 'FAMIS Xi (kkoenig@prod)'. The menu bar includes 'File', 'Edit', 'Query', 'Record', 'Attachments', 'Window', and 'Help'. The toolbar contains various icons for file operations and navigation. The main area is divided into two sections: 'Purchase Requisitions' and 'Purchase Orders'.

**Purchase Requisitions**

Preq No.	Line	Status	Quantity	Vendor No.	Require Date

**Purchase Orders**

PO Number	Rel	Line	Status	Require Date	Qty. Ordered	Qty. Received	Received Date

On the right side of the 'Purchase Requisitions' section, there are two radio buttons: 'Active Orders Only' (selected) and 'All Orders'. Below them are two buttons: 'View...' and 'Create Preq...'. A black arrow points to the 'Create Preq...' button.

# Preq Form

A) **Mandatory field**

Put a description of what the Preq is for. This will transfer to the top line of the PO, but it will not print on either form.

B) You can put the name of the person the order is for in this space.

C) Purchase type stays as **Inventory**.

D) Click Add Line.

The screenshot shows the 'Purchase Requisition' form in the FAMIS Xi application. The form is titled 'Purchase Requisition' and has a menu bar with 'File', 'Edit', 'Query', 'Record', 'Attachments', 'Window', and 'Help'. The main form area is divided into several sections:

- PREQ Information:** Includes fields for 'PREQ Number' (with a dropdown menu set to '\*\*ASSIGN\*\*'), 'Requested By' (set to 'KKOENIG'), 'Next Approver', and a 'Print?' checkbox.
- Purchase Type:** A dropdown menu set to 'INVENTORY'. Other fields include 'Drop Ship' and 'Agreement No'.
- Status:** A dropdown menu set to 'APPROVED'.
- Deliver To:** A text field for the recipient's name.
- Line Items:** A table with columns for 'Line', 'Part Number', 'Description', 'Status', 'QuantityUop', and 'Amount'. The table is currently empty.
- Buttons:** 'Add Line...', 'View...', 'Reject', and 'Total'.

Callouts A, B, C, and D point to specific elements in the form:

- A:** Points to the 'PREQ Number' dropdown menu.
- B:** Points to the 'Deliver To' text field.
- C:** Points to the 'Purchase Type' dropdown menu.
- D:** Points to the 'Add Line...' button.

# Preq Line Form

## 1) Line Information Fields

- Fill in date needed by. Can type date or use F9 key to bring up calendar. Extra freight charges may be added to meet date.
- If you started Preq from work order form, the WO# will fill in automatically. If you started from Preq, you will need to add WO# after you have added part number.
- **Advise checkbox does not work**

The screenshot shows the 'Line Item' form with the following data:

Line Information		Part Information	
Line / Status	1 PLACED	Warehouse	RC
Date Required	1/15/2023	Part Number	SV
WO Number	R876472	Commodity	
Advise	<input type="checkbox"/>	Urgent	<input type="checkbox"/>

  

Suggested Vendor		Manufacturer	
Vendor No	IMAGE IMAGE360 ROCHESTER	MFR	
Vendor P/N		Mfr Part Number	
Buyer		Mfr Brand	
		Substitution	<input type="checkbox"/>

  

Description		Quantity & Estimated Price	
DECALS FOR 2019 RAV4 AS PER QUOTE		Uop	Each View Conversion...
		Quantity	1.00
		Unit Price	1,125.5200
		Amount	1,125.52

Buttons at the bottom: Dates..., POs..., Accounts..., OK, Cancel

# Preq Line Form Continued

## 2) Part Information Field

- Warehouse fills in automatically
- Part numbers to use are:
  - **MT** or **Material** for parts
  - **SV** or **Service** for a vendor coming in to do service
  - **Repair** for items being sent out for repair or service (not on-site)
  - **Capital** is used at MC
  - CUMT is used at Central Utilities for material
  - CUSV is used at Central Utilities for service
- **Never use a stock part number**
- Commodity field is left blank
- Urgent checkbox does not work

2

The screenshot shows the 'Line Item' form with the following data:

Line Information		Part Information	
Line / Status	1 PLACED	Warehouse	RC
Date Required	1/15/2023	Part Number	SV
WO Number	R876472	Commodity	
Advise	<input type="checkbox"/>	Urgent	<input type="checkbox"/>

  

Suggested Vendor		Manufacturer	
Vendor No	IMAGE IMAGE360 ROCHESTER	MFR	
Vendor P/N		Mfr Part Number	
Buyer		Mfr Brand	
		Substitution	<input type="checkbox"/>

  

Description		Quantity & Estimated Price	
DECALS FOR 2019 RAV4 AS PER QUOTE		Uop	Each View Conversion...
		Quantity	1.00
		Unit Price	1,125.5200
		Amount	1,125.52

Buttons: Dates... POs... Accounts... OK Cancel

# Preq Line Form Continued

## 3) Suggested Vendor Fields

- Enter vendor code in Vendor No space
- If you do not know the code, click the Vendor No box which brings up Vendor List Form.
- Query: Enter part of vendor name with % sign before and after. This brings up list of all vendors that meet criteria. Select vendor you want – click OK.
- Vendor P/N - Enter vendor part # if there is one
- Leave Buyer field blank

The screenshot shows the 'Line Item' form with the following fields and values:

Line Information		Part Information	
Line / Status	1 PLACED	Warehouse	RC
Date Required	1/15/2023	Part Number	SV
WO Number	R876472	Commodity	
Advise	<input type="checkbox"/>	Urgent	<input type="checkbox"/>
Suggested Vendor		Manufacturer	
Vendor No	IMAGE IMAGE360 ROCHESTER	MFR	
Vendor P/N		Mfr Part Number	
Buyer		Mfr Brand	
		Substitution	<input type="checkbox"/>
Description		Quantity & Estimated Price	
DECALS FOR 2019 RAV4 AS PER QUOTE		Uop	Each View Conversion...
		Quantity	1.00
		Unit Price	1,125.5200
		Amount	1,125.52

Buttons at the bottom: Dates..., POs..., Accounts..., OK, Cancel

The screenshot shows the 'Vendor List Form' with a table of vendor information:

Vendor Name	Type	Status	Vendor No.

Buttons at the bottom: OK, Cancel

# Preq Line Form Continued

## 4) Manufacturer Fields

- **DO NOT USE MFR, MFR Part Number, or MFR Brand boxes**
- Put all MFG information in the Vendor P/N box and Description field
- Substitution box does not work

The screenshot shows a 'Line Item' form with the following data:

Line Information		Part Information	
Line / Status	1 PLACED	Warehouse	RC
Date Required	1/15/2023	Part Number	SV
WO Number	R876472	Commodity	
Advise	<input type="checkbox"/>	Urgent	<input type="checkbox"/>

  

Suggested Vendor		Manufacturer	
Vendor No	IMAGE IMAGE360 ROCHESTER	MFR	
Vendor P/N		Mfr Part Number	
Buyer		Mfr Brand	
		Substitution	<input type="checkbox"/>

  

Description		Quantity & Estimated Price	
DECALS FOR 2019 RAV4 AS PER QUOTE		Uop	Each View Conversion...
		Quantity	1.00
		Unit Price	1,125.5200
		Amount	1,125.52

Buttons at the bottom: Dates..., POs..., Accounts..., OK, Cancel

A blue arrow points to the 'MFR' field in the Manufacturer section, which is highlighted in yellow.

4

# Preq Line Form Continued

## 5) Description Field

- Material: Full description of what the item is - manufacturer number, part number, specs, etc.
- If ordering a case: List it here
- Only one item per line
- If it is a stock item in the warehouse: List the stock part number, but include a complete description
- Service: List what is being done, where it is being done, when the work will take place, and a contact at the company.
- If applicable list “Emergency” or “Rush” as first word.

The screenshot shows a software window titled "Line Item" with the following sections:

- Line Information:** Line / Status: 1 PLACED; Date Required: 1/15/2023; WO Number: R876472; Advise:
- Part Information:** Warehouse: RC; Part Number: SV; Commodity: ; Urgent:
- Suggested Vendor:** Vendor No: IMAGE IMAGE360 ROCHESTER; Vendor P/N: ; Buyer:
- Manufacturer:** MFR: ; Mfr Part Number: ; Mfr Brand: ; Substitution:
- Description:** A text area containing "DECALS FOR 2019 RAV4 AS PER QUOTE".
- Quantity & Estimated Price:** Uop: Each; View Conversion...; Quantity: 1.00; Unit Price: 1,125.5200; Amount: 1,125.52

At the bottom, there are buttons for "Dates...", "POs...", "Accounts...", "OK", and "Cancel".

# Preq Form Completing

- A) If adding another line, click Add Line button
- B) The status will be either Requested or Approved, depending on your dollar limit
- C) If Preq is in Requested status, the next approver's name is listed under your name

The screenshot shows a 'Purchase Requisition' form with the following details:

**PREQ Information:**  
PREQ Number: Q811421  
Requested By: ASMITH2  
Next Approver: MCERVONE  
Purchase Type: INVENTORY  
Status: REQUESTED  
Deliver To: R.SHEPARD

**Line Items Table:**

Line	Part Number	Description	Status	QuantityUop	Amount
1	MT	(6) 2X2 SLIM LINE FILTER	REQUESTED	6.00 EA	2,100.00

**Buttons:** Add Line, View, Revert, Dates..., Print, Quote..., Approve, Approval Routing...

**Annotations:**  
- 'A' points to the 'Add Line' button.  
- 'B' points to the 'Status' dropdown menu.  
- 'C' points to the 'Next Approver' field.





## Second method to create a preq

Start directly on the Preq form

- Mechanic's Bench – Parts – Purchase Req
- Supervisor's Bench – Purchasing – Purchase Req
- This method must be used for standing work orders
- Work order number must be filled in on each line



# Things To Remember

- Vendors do not have access to the work order# or preq#. So don't contact vendor looking for update on your order with either of these numbers.
- The information put next to the preq# does not transfer to the PO.
- One part# per line. We need to receive each item as it comes in.

# Examples of incorrect preq's

## No vendor part# listed

MIS Xi (kkoenig@prod)

File Edit Query Record Attachments Window Help

Line Item

<b>Line Information</b>	<b>Part Information</b>
Line / Status: 2 APPROVED	Warehouse: MC
Date Required: 3/17/2023	Part Number: MT
WO Number: R936601	Commodity:
Advise: <input type="checkbox"/>	Urgent: <input type="checkbox"/>
<b>Suggested Vendor</b>	<b>Manufacturer</b>
Vendor No: WWG001 W. W. GRAINGER	MFR:
Vendor P/N:	Mfr Part Number:
Buyer:	Mfr Brand:
	Substitution: <input type="checkbox"/>
<b>Description</b>	<b>Quantity &amp; Estimated Price</b>
COUPLING: 1 IN X 1 IN FITTING PIPE SIZE, SCHEDULE 80, FEMALE SOCKET X FEMALE SOCKET, 630 PSI @ 73° F	Uop: Each View Conversion...
	Quantity: 3.00
	Unit Price: 5.5700
	Amount: 16.71

Dates... POs... Accounts... OK Cancel

Add Line... View... Reject Total 21

## No price listed in unit price field

MIS Xi (kkoenig@prod)

File Edit Query Record Attachments Window Help

Line Item

<b>Line Information</b>	<b>Part Information</b>
Line / Status: 1 REQUESTED	Warehouse: MC
Date Required:	Part Number: MT
WO Number: R955711	Commodity:
Advise: <input type="checkbox"/>	Urgent: <input type="checkbox"/>
<b>Suggested Vendor</b>	<b>Manufacturer</b>
Vendor No: EWD001 ELMER W. DAVIS	MFR:
Vendor P/N:	Mfr Part Number:
Buyer:	Mfr Brand:
	Substitution: <input type="checkbox"/>
<b>Description</b>	<b>Quantity &amp; Estimated Price</b>
315 SP: ROOF LEAK ELMER DAVIS NOT TO EXCEED \$1000	Uop: Each View Conversion...
	Quantity: 1.00
	Unit Price: .0000
	Amount: .00

Dates... POs... Accounts... OK Cancel

Add Line... View... Reject Total



# What paperwork is required?

- Any service requires a quote. If scope of work not known then use not to exceed (NTE) amount but be as accurate as possible.
- Material orders under \$1,000 generally do not require a quote but if specialty item you should have one.
- Under \$25,000 only one quote needed.
- Over \$25,000– three quotes required. If did not get 3 quotes, then be ready to explain why.
- Over \$25,000 also requires 2 forms - (SPJCI) Supplier Price Justification and Conflict Information form and the Additional Justification form.
- **All paperwork needs to be emailed to our 402 email boxes – 402mc, 402rc or 402cu depending on your location.**

# Supplier Price Justification & Conflict Information

## Section A – bids

**University or Hospital Contracted Supplier** – vendors negotiated by Corporate Purchasing for University-wide contracts - not necessary to have other bids when using these vendors:

- Champion Moving
- Otis Elevator
- Waste Management
- Wesco

### Supplier Price Justification and Conflict Information (SPJCI) Form

Required for UR, URM and HH Sponsored and Non-Sponsored Fund Purchases

Date	Req#	Vendor	Requested by	Phone
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Department must submit a completed SPJCI Form for all purchases; if the total is \$25,000 or greater.

Complete all applicable sections, sign and attach all supporting documentation (proposed contract, all quotes, analyses, etc). Provide full explanation, complete description and/or list all relevant reasons where space has been provided. The rationale must be clear and convincing, avoiding generalities. Incomplete forms or forms lacking sufficient detail cannot be approved and may be returned possibly delaying issuance of a purchase order.

Note: Departments are responsible for retention of all justification and supporting documentation needed to support a compliance audit for all Purchases, whether the purchases are internal and/or direct made via Contract, Requisition, Request for Payment, Supplier Invoice Request, SOLO, P-Card, Petty Cash, etc.

#### SECTION A - Written Quotes, Proposals, and Competitive Bids - Purchases >= \$250,000

Competitive Bids - Purchases >= \$250,000 require multiple written formalized bids through a competitive proposal process and require a cost price analysis be performed in conjunction with the bid review process.

(Same item quote by multiple suppliers): Attach bids/quotes/proposals to this form. Record below.

\* The use of a competitive bid and negotiated agreement on behalf of the University (i.e. University or Hospital contracted standard supplier) satisfies the bid requirements.

Identify the Purchasing Staff member who assisted with obtaining and analyzing the quotes:

	Total/Quoted Price	Quote Attached?		Small Business?			
1	\$	Y	<input checked="" type="checkbox"/>	N	Y	N	<input checked="" type="checkbox"/>
2	\$	Y	<input type="checkbox"/>	N	Y	N	<input type="checkbox"/>
3	\$	Y	<input type="checkbox"/>	N	Y	N	<input type="checkbox"/>

\*University or Hospital Contracted Standard Supplier?

Name	Quoted Price	Y	<input type="checkbox"/>	N	<input type="checkbox"/>
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# SPJCI Page 2

- **Section B** – If did not get competitive bids, then fill out top section.
- If low bid not selected then check all boxes that apply in next section.

Date	Req#	Vendor	Requested by	Phone
<b>SECTION B – Non-Competitive/Low Bid Not Selected – Required for all Purchases &gt;= \$25,000</b>				
<i>(Select one and explain)</i>				
Vendor Name:		Description of Product / Service:		
<input type="checkbox"/> <b>Non-Competitive</b> (no other company with known capability, proprietary or patented product/service)				
<input type="checkbox"/> The item or service is only available from a single source.				
<input type="checkbox"/> A public exigency or emergency for the requirement will not permit a delay resulting from competitive solicitation				
<input type="checkbox"/> The Federal awarding agency or pass-through entity expressly authorizes non-competitive proposals in response to a written request or as identified in the project proposal				
<input type="checkbox"/> After solicitation a number of sources, competition is determined inadequate				
<input type="checkbox"/> <b>Low Bid Not Selected:</b> (multiple quotes obtained but lowest bid was not selected for the following reasons: Technical requirements precision, tooling, reliability, etc., ability to maintain research continuity, past performance of alternative suppliers (poor performance, service, unavailability of parts, etc.), identify other sources considered and basis for rejection (continue on back as necessary))				
<i>Please select the reason for recommending the above named supplier:</i>				
<input type="checkbox"/> The requested product is an integral part or accessory to existing equipment.				
<input type="checkbox"/> The service requested is for existing equipment, which can only be completed by the original manufacturer, or a manufacturer's designated service provider.				
<input type="checkbox"/> The requested product or service has a unique design, performance, and/or quality specifications that are essential to a particular research protocol or teaching needs and are not available in comparable products.				
<input type="checkbox"/> The requested product or service is essential in maintaining research continuity in the following manners (check all that apply)				
<input type="checkbox"/> Requested product is being used in continuing research experiments				
<input type="checkbox"/> For comparability of research results, the same product is required				
<input type="checkbox"/> This good/service has been identified an approved in this research grant contract				
<input type="checkbox"/> The requested service requires a supplier that can demonstrate unique skills or experience				
<input type="checkbox"/> Emergency – The goods or services are needed to correct or prevent an emergency health, environmental or safety hazard, special or time sensitive events; and/or emergency repair or replacement of existing equipment essential for daily operations				

# SPJCI Page 3

- Section C – check if got competitive bids, or pricing is NYS contract or University-wide contract or if is better pricing than doing in-house.
- Section D – verify there is no conflict of interest

Supplier Price Justification and Conflict Information (SPJCI) Form

Date	Request	Vendor	Requested by	Phone
<b>SECTION C – Cost/Price Analysis – Required for All Purchases &gt; = \$25,000</b>				
<i>(Select all below that support determination that this purchase is fair and reasonable)</i>				
<input type="checkbox"/> Competitive Bids (see page 1 for summary of responses)				
<input type="checkbox"/> 2 written quotes attached (2CFR200 requirement for Grant (GR) Purchases)				
<input type="checkbox"/> Contract prices reflecting savings that are not available to the general public (University-Wide, GPO, GSA, NYS or EA). Please specify contract				
<input type="checkbox"/> Quoted prices compare more favorably than in-house (University IT, ID, Copy Ctr, Facilities) or national benchmarks (i.e. ECR)				
Independent Estimate \$240,999 <input type="checkbox"/> (include summary of independent estimates and supporting documentation of cost/price)				
<b>SECTION D – Conflict of Interest</b>				
Conflict of Interest Information – per University Conflict of Interest Policy.				
<input type="checkbox"/> No Conflict of Interest Exists (if checked, continue to Section E)				
Name of University affiliated individual with Conflict of Interest: <input type="text"/> Title <input type="text"/>				
In addition to the information set forth in Sections A, B, and C above, check all brackets describing the process utilized to manage the Conflict of Interest:				
<input type="checkbox"/> The individual was excluded from all discussions and decision-making				
<input type="checkbox"/> The individual was involved (e.g. in discussions) but did not participate in the decision				
<input type="checkbox"/> The recommendation or decision was made by the individual's supervisor				
<input type="checkbox"/> The recommendation or decision was made by internal individuals with appropriate expertise				
<input type="checkbox"/> An external expert recommended the purchase				
<input type="checkbox"/> Other management strategies and reasons (describe):				
<b>IF A CONFLICT OF INTEREST EXISTS, THE UNIVERSITY'S SENIOR VICE PRESIDENT OF ADMINISTRATION AND FINANCE, OR HIS OR HER DESIGNEE, MUST APPROVE THE PURCHASE.</b>				
<input type="checkbox"/> APPROVED <input type="checkbox"/> DISAPPROVED ON BEHALF OF SR VP OF ADMINISTRATION AND FINANCE				
By: <input type="text"/>				
Title: Associate Vice President of Purchasing and Supply Chain				Date: <input type="text"/>

SPJCI 10/2019 Page 1 of 5

# SPJCI Page 4

- For minority and small business. Fill out as applicable

Supplier Price Justification and Conflict Information (SPJCI) Form

Date	Reg#	Vendor	Requested by	Phone				
<b>Section E - Minority and Small Business Information - Required for all federally funded Purchases (PAO + GR) &gt; = \$25,000</b>								
Size Category	Number Solicited	Reason Not Solicited	Reason Not Selected					
Other Than Small Business		XXXXXXXXXXXXXXXXXXXXXXXXXXXX	XXXXXXXXXXXXXXXXXXXXXXXXXXXX					
Small Businesses (including ANC's and Indian Tribes)		Select from List ▼	Select from List ▼					
Small Disadvantaged Businesses (including ANC's and Indian Tribes)		Select from List ▼	Select from List ▼					
Woman-Owned Small Businesses		Select from List ▼	Select from List ▼					
HubZone Small Businesses		Select from List ▼	Select from List ▼					
Veteran-Owned Small Businesses		Select from List ▼	Select from List ▼					
Service-Disabled Veteran-Owned Small Businesses		Select from List ▼	Select from List ▼					
Minority Owned Business		Select from List ▼	Select from List ▼					
<p style="text-align: center;"><b>Instructions for completing above table:</b></p> <ul style="list-style-type: none"> <li>✓ Write the number of suppliers solicited from each category in the second column (even if zero).</li> <li>✓ For all categories not solicited, explain why in the second column using key 1-6 below.</li> <li>✓ For the categories solicited but not selected, put the reason in the fourth column using the key A-F below.</li> </ul>								
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SPJCI 10/2019 Page 4 of 5



# SPJCI page 5

- Requestor has to sign
- If any of the following apply, then appropriate Director has to sign as well:
  - 3 bids but lowest bid not selected.
  - Less than 3 bids

Supplier Price Justification and Conflict Information (SPJCI) Form

Date	Request	Vendor	Requested by	Phone
------	---------	--------	--------------	-------

Department Administrative Authorization/Certification (Department Administrator, Principal Investigator and delegate and Sponsored Research/Financial Administrator) that the information provided is correct. By signing, I confirm that I am aware of University of Rochester's Competitive bid requirements in support of Federal guidelines (for federal project related purchases) the need to consider small and/or minority businesses for procurement transactions.

Please print and sign before sending

Name (print)	Title & Signature	Date
Name (print)	Title & Signature	Date

FOR PURCHASING USE ONLY	
Category Manager / PA Reviewed	
Senior Category Manager Reviewed	
Category Director Reviewed	
Assoc VP Reviewed	

# Additional Justification Form

## Justification for Requisitions over \$25,000

Senior Leadership has established measures to ensure all purchases over \$25K contain favorable pricing. These requisitions will be reviewed prior to being submitted to request a purchase order. Please provide answers to the following questions.

### Vendor:

Click or tap here to enter text.

### Amount:

Click or tap here to enter text.

### Work order number and description

Click or tap here to enter text.

### Description of work to be done by the vendor, include location details (if for service):

Click or tap here to enter text.

### Why work cannot be performed in-house:

Click or tap here to enter text.

### If for material only, describe material being ordered and uses

Click or tap here to enter text.

### Was this bid? If not why?

Click or tap here to enter text.

### Does the purchase contain favorable terms and pricing? Explain



# Additional Justification Form

Is the service and/or material being purchased directly from the provider/manufacture or from a distributor?

Click or tap here to enter text.

If through a distributor, is it possible to purchase directly from the manufacturer? (Typically when purchasing direct, there can be a significant cost savings.)

Click or tap here to enter text.

Why is this work critical to be done now? What are the consequences of deferring this purchase?

Click or tap here to enter text.

---

Identify Funding source and category

Click or tap here to enter text.



# What happens next?

- There are 3 types of purchase orders that Materials Management can issue:
  - An “I” PO
  - A Standing PO
  - A PO through Corporate Purchasing

# Types of Purchase Orders

- I purchase order
  - PO# is 6 digits followed by -I
  - Can only be for material or for a repair being done offsite up to \$1,000. Cannot be for service.
  - PO# can be given right away.



# Standing PO

- For vendors used frequently, we set up a SPO through Corporate Purchasing for a not to exceed amount and specific time period.
- For jobs under \$5,000 each. Can be for material or for service.
- PO can be issued right away, as long as we have not gone over our PO total. Is issued as a release number against the standing PO number.



# Purchasing PO

- If we can't do a SPO or an "I" PO then we have to do a req to Corporate Purchasing through Procure to Pay (P2P) system.
- Depending on their workload and the vendor status this can take anywhere from a couple days to several weeks to get a PO issued.
- If you keep having to wait for this type of PO for a particular vendor, you need to let us know so we can set up a SPO with them.
- Some material vendors have a catalogue in P2P and we are required to go through P2P for these vendors – McMaster Carr, Grainger are examples. These PO's usually issued fairly quickly.

# Preq/PO status

- Preq
  - Requested – still needs to be approved by someone
  - Approved – preq is approved and with Materials Management to process
  - Placed – preq has been turned into a purchase order
- Purchase Order
  - Open – PO has been sent to vendor and waiting for confirmation
  - Placed – PO has been confirmed by vendor with pricing and delivery date
  - Complete – PO has been received





# WHAT HAPPENS IF?

- A job is quoted and preq/PO created but then additional work is added resulting in a higher price:
  - A new preq must be done for the new total amount. Current PO#/rel# should be referenced in the preq.
  - This ensures that the preq goes through the correct approval process.
  - If the original job was over \$25,000 or the new total results in the job going over this amount then a new justification form must be done as well.

# WHAT HAPPENS IF?

- Preq/PO was done for a not to exceed amount (NTE) and when the invoice comes in it is higher?
  - If the amount is less than \$500 higher you do not need to do anything. (I.E. PO for \$1,000, invoice for \$1,400).
  - If the amount is more than \$500 higher, then a new preq must be done for the new total amount. (I.E. PO for \$1,000, invoice for \$2,000) Please reference the current PO#/rel# in your preq.



# WHAT HAPPENS IF?

- PO done for various parts but requestor orders another part that is not on PO without doing a preq.
  - Preq must be done for the new part before it can be picked up.
- You don't know how to do a preq – can someone in Materials Management do it for you?
  - Sorry we are not allowed to do preqs for anyone else. It needs to go through the appropriate approval process.

# Rejected Preqs

- If a Preq is rejected, it must either be corrected or cancelled:
  - To correct: Query the Preq# and click View Line. Make your changes to the description, price, etc. Preq will automatically go back to Materials Management or to Supervisor for approval.
  - To cancel: Change status on Preq form to Canceled If Famis won't let you cancel then let us know and we can.

The screenshot shows the 'Purchase Requisition' window in the FAMIS Xi application. The window title is 'FAMIS Xi (kkoenig@prod)'. The menu bar includes 'File', 'Edit', 'Query', 'Record', 'Attachments', 'Window', and 'Help'. The toolbar contains various icons for file operations and navigation. The main form area is divided into several sections:

- PREQ Information:** Includes fields for 'PREQ Number' (Q570789), 'Requested By' (KKOENIG), 'Next Approver', and a 'Print?' checkbox.
- Purchase Type:** A dropdown menu is set to 'INVENTORY'. Other fields include 'Drop Ship' and 'Agreement No'.
- Status:** The status is 'CANCELED'.
- Deliver To:** A field for the delivery location.
- Line Items:** A table with columns: Line, Part Number, Description, Status, QuantityUop, and Amount. The first row is highlighted in blue and contains: 1, MT, ADVANCE BALLAST, 12W 277V, CANCELED, .00 EA, .00.
- Buttons:** 'Add Line...', 'View...', 'Reject', 'Dates...', 'Print', 'Quote...', 'Approve', and 'Approval Routing...'.
- Total:** A field at the bottom right showing a total amount of .00.

# Tracking Your Order

- 1) Start at work order form to find status of Preq, delivery dates, or pricing. Continue as if creating new Preq until you get to Orders form.
- 2) There are two views: One shows Active Orders, and the other shows All Orders. Top portion lists Preq's, bottom portion list PO's.
- 3) In the Active Orders Only view, a Preq will only show if it has not been turned into a PO. A PO will only show if it has not been closed out yet.
- 4) To view a Preq, click on that line and click the View button.

FAMS Xi (kkoenig@prod)

File Edit Query Record Attachments Window Help

Orders

**Purchase Requisitions**

Preq No.	Line	Status	Quantity	Vendor No.	Require Date

Active Orders Only  
 All Orders

View...  
Create Preq...

**Purchase Orders**

PO Number	Rel	Line	Status	Require Date	Qty. Ordered	Qty. Received	Received Date
UK215018-10		5	1 PLACED	25-JUN-2010	1.00		

FAMS Xi (kkoenig@prod)

File Edit Query Record Attachments Window Help

Orders

**Purchase Requisitions**

Preq No.	Line	Status	Quantity	Vendor No.	Require Date
Q568382	1	PLACED	1.00	ARROWC	
Q568973	1	PLACED	1.00	ARROWC	
Q569518	1	PLACED	2.00	WD12	

Active Orders Only  
 All Orders

View...  
Create Preq...

**Purchase Orders**

PO Number	Rel	Line	Status	Require Date	Qty. Ordered	Qty. Received	Received Date
UK220031-10	932	1	COMPLETE	30-JUN-2010	2.00	2.00	30-JUN-2010
UK215018-10	5	1	COMPLETE	25-JUN-2010	1.00		
UK215018-10	4	1	COMPLETE	17-JUN-2010	1.00	1.00	17-JUN-2010

# Tracking Your Order Continued

This takes you to Preq line form.  
Click PO button at bottom.

If Preq has been turned into a PO it  
is listed here. Click view button.

FAMIS Xi (kkoenig@prod)

File Edit Query Record Attachments Window Help

Line Item

**Line Information**  
Line / Status 1 PLACED  
Date Required  
WO Number X742113  
Advise

**Part Information**  
Warehouse RC  
Part Number MT  
Commodity  
Urgent

**Suggested Vendor**  
Vendor No W012 WESCO  
Vendor P/N GAS DIPPING STICK  
Buyer

**Manufacturer**  
MFR  
Mfr Part Number  
Mfr Brand  
Substitution

**Description**  
FUEL DIPPING STICK 14'

**Quantity & Estimated Price**  
Uop Each View Conversion...  
Quantity 2.00  
Unit Price 17.0800  
Amount 34.16

Dates... **POs...** Accounts... OK Cancel

Purchase Requisition

Purchase Orders

PO Number	Status	Price	Ordered	Received
UK220031-10	COMPLETE	17.0800	2.00	2.00

View... OK

Add Line... View... Reject Total 34.16

Dates...  
Print  
Quote...  
Approve  
Approval Routing...  
Amount 34.16

# Tracking Your Order Continued

This takes you to PO Line form

- A) Status of the order
- B) Confirmed delivery date (use Cur Required)
- C) Confirmed price
- Click OK button and will go to PO page where you can see PO# and release# (if there is one)

The screenshot shows the 'Line Detail - UK220031-10 Line 1' form in the FAMIS Xi application. The form is divided into four main sections:

- General Information:** Includes fields for Preq No. (0569518), Line (1), WO Number (X742113), Crew (MAT MGMT), Warehouse (RC), Part Number (MT), and Commodity.
- Status & Dates:** Includes Status (COMPLETE), Org. Required (6/30/2010), Cur. Required (6/30/2010), Promised (6/30/2010), Last Rec'd (6/30/2010), and checkboxes for Advise and Urgent?.
- Description of Parts or Services:** Includes Vendor Part No. (GAS DIPPING STICK), Manufacturer, Brand, Mfr Part No., and Description (FUEL DIPPING STICK 14'). There is also an 'Allow Substitutions' checkbox.
- Quantity and Cost:** Includes UOP (Each), Quantity (2.00), Original Unit Price (17.0800), Current Unit Price (17.0800), Freight, and Current Amount (34.16).

Callouts A, B, and C are positioned to the right of the form, with arrows pointing to the Status, Cur. Required, and Original Unit Price fields respectively.

# Finding Previous Order Information

- To research previous orders that you or someone else placed, open a blank Preq and enter query mode
  1. Put name of person who placed Preq in Requested By box
  2. Put partial description in field with % sign before and after
  3. Once query is executed, use arrow keys to scroll through all Preq's
- This procedure also works on the PO form

The screenshot shows the 'Purchase Requisition' form in the FAMS Xi application. The 'Requested By' field is highlighted with a box labeled '1'. The 'PREQ Number' field contains the text '%SHOWER CURTAIN%' and is highlighted with a box labeled '2'. The 'Deliver To' field is highlighted with a box labeled '3'. Below the form is a table with columns: Line, Part Number, Description, Status, QuantityUop, and Amount. The table is currently empty. At the bottom of the form are buttons for 'Add Line...', 'View...', and 'Reject', and a 'Total' field.



# Vendor Workbench

- To research a vendor: Start on the Vendor Workbench form, located in the Parts folder
- Query the vendor name, using % sign to see list of vendors.
- To see more information on a vendor, click View Vendor button to go to the Vendor form

The screenshot shows the 'Vendor Workbench' window in the FAMIS Xi application. The window title is 'FAMIS Xi (kkoenig@prod)'. The menu bar includes 'File', 'Edit', 'Query', 'Record', 'Attachments', 'Window', and 'Help'. The 'famis' logo is in the top right corner. Below the menu bar is a toolbar with various icons. The main area is titled 'Vendor Workbench' and contains a 'Find Criteria' section with input fields for 'Commodity' and 'PO Number', and a 'Find' button. Below this is a table of vendors with columns: Vendor No, Name, Sales Rep., Telephone, Status, Type, and Buyer. The table lists 18 vendors, with 'BILLT' selected. At the bottom of the window are four buttons: 'View Vendor...', 'Add Vendor...', 'Parts...', and 'Commodity...'.

Vendor No	Name	Sales Rep.	Telephone	Status	Type	Buyer
BILLT	BILLTIER ELECTRIC, INC.	DAN BAMAN	224-1111	APPROVED	SUPPLIER	
CAE001	CLARKSON AUTO ELECTRIC	MATT	637-4826	GONE	SUPPLIER	
DIV551	DIVERSIFIED ELECTRIC SERVIC	RICHARD LANDRIGAI	1-440-892-0753	APPROVED	SUPPLIER	
ECELEC	EASTCOAST ELECTRIC LLC	LOUIS MAIER ;	647-0110	APPROVED	SUPPLIER	
GEC001	GRAYBAR ELECTRIC COMPAN	BILL MILLER	585-458-3600	APPROVED	SUPPLIER	
GEM005	GILLETTE ELECTRIC MOTORS	WARREN	585-624-9421	APPROVED	SUPPLIER	
KEC001	K. J. ELECTRIC	GARY	585-426-3900	APPROVED	SUPPLIER	
LIBELE	LIBERTY ELECTRIC SALES	KEN HUGH	315-437-8100	APPROVED	SUPPLIER	
ME004	MAYNARD'S ELECTRIC SUPPLY	JIM PARLATO	585-266-6060	APPROVED	SUPPLIER	
MEV551	MILES ELECTRIC VEHICLES		310-390-4890	APPROVED	SUPPLIER	
OEC003	O'CONNELL ELECTRIC		585-924-2176	APPROVED	SUPPLIER	
RID22	RUSSELECTRIC INC	JIM MAHONEY	781-749-6000	APPROVED	SUPPLIER	
ROCGAS	ROCHESTER GAS AND ELECTR		1-800-743-2110	APPROVED	SUPPLIER	
SHE001	SCHULER-HAAS ELECTRIC	JOHN SCHULER	7163251060	APPROVED	SUPPLIER	
ZED01	ZELLER ELECTRIC	ERIC ZELLER	585-254-8840	APPROVED	SUPPLIER	

# Vendor Form

- Vendor Sites tab shows address
- To see list of PO's, click PO History button and then click Find button on form

- To see further information on a PO click the PO line and click View button to go to PO form

Vendor: **BILLIT** BILLITIER ELECTRIC, INC.

General | Parts | Commodities | Contacts | Vendor Sites | Agreements | Disadvantage Type | Attributes

**General Information**

Sales Rep: DAN BAMAN      Type: **SUPPLIER**      Dates...  
Telephone: 224-1111      Status: **APPROVED**      PO History...  
Fax: 224-1110      Ship Via: **GROUND**  
Disadvantaged:       Freight Terms: **DESTINATIO**  
Default Purchase Site: **PURCHASE**      Shipping Terms: **PREPAY&ADD**  
Vendor ID: **BILLIT**

Buyer: \_\_\_\_\_  
Payment Term: **NET 30**

FAMIS XI (koenig@prod)

File Edit Query Record Attachments Window Help

Purchase Order History - BILLIT

PO Number:  From Enter Date:  Find  
Active: **BOTH** To Enter Date:

PO Number	Release No.	Description	Status	Item Count
<b>Uk221621-10</b>	112	AREA 5-1210(NUTRITION RM) -	PLACED	1
Uk221621-10	111	BILLITIER TO PROVIDE ELECTR	PLACED	1
Uk206510-10	50		PLACED	1
Uk221621-10	110	ELECTRCIAL WORK	COMPLETE	1
Uk206509-10	14	INSTALL FREEZER ALARM 2-43	PLACED	1
Uk206509-10	13		COMPLETE	1
Uk221621-10	109		OPEN	2
Uk206510-10	49		PLACED	1
Uk206509-10	12		PLACED	1
Uk206510-10	48		PLACED	1
Uk221621-10	108	BILLITIER OVERTIME WORK FO	PLACED	1

View...

Record: 1/7 <OSC>



# Invoice Approval

- Any job based on Time & Material rates will be reviewed by the Financial Transactions Administrator to verify correct rates are being charged versus vendor's quoted rates/markup.
- It is the Requestor's responsibility to ensure that the number of hours and/or days worked are accurate and the material charged is appropriate for the job done.



# Vendor Invoice Communication

- Letter will be sent to all vendors annually
  - Vendors may not start work without a valid PO#.
  - Send all invoices to UF&S Materials Management, not Finance Accounts Payable.
  - Invoice must include all required backup documentation – labor timesheets, material invoices, equipment rental invoices, mark-up, and subcontractor invoices, all as required.
  - Do not proceed with any work or ordering of materials (adjustments/increases to PO) without appropriate PO amendment.
  - Invoices must be sent in a timely manner.
  - Fuel surcharges are not allowed.
  - Partial invoices must be billed monthly.
  - The University reserves the right to audit each vendor.
  - Each vendor must adhere to University of Rochester Terms & Conditions.
  - The University maintains a Fraud hotline 275-1609. Anonymous reports may be made to Integrity Hotline at 756-8888.

# Monthly Report

- Will be sent to UF&S Management
- Report will show on a tab for MC, RC & CU: requestor, vendor, preq dollar amount and preq description
- It is responsibility of management to review report.
- Second tab for each site on report shows number of open work orders

CREW	REQUESTOR	PREQ TOTAL	APPROVED BY	PREQ NO	ENTER DATE	WO NUMBE R	VENDO R	PREQ DESCRIPTION
CTSBBM	MSYDOW	\$95.16	RHIBBARD	Q632534	01/03/201	Z580992	WESCO	BOLLARD ANCHOR BASE
CTSBBM	MSYDOW	\$103.88	RHIBBARD	Q632694	01/08/201	Z472883	WESCO	MOP HANDLE AND HEADS
CTSBBM	MSYDOW	\$75.95	RHIBBARD	Q633061	01/15/201	Z472883	WESCO	FLASHLIGHT
CTSBBM	MSYDOW	\$207.40	RHIBBARD	Q633513	01/23/201	Z580992	WESCO	BOLLARD BASE
CTSBBM	MSYDOW	\$92.92	RHIBBARD	Q633594	01/24/201	Z472883	WESCO	AMERICAN PADLOCKS
	MSYDOW Total	\$575.31						
	CTSBBM Total	\$575.31						
CTSbsp	DSCHERMER	\$354.88	DSCHERME R	Q633163	01/16/201	Z534229	WESCO	TEE
CTSbsp	DSCHERMER	\$1,350.00	DSCHERME R	Q633222	01/17/201	Z552023	POSTLE R & JAECKLE	R WING 6" WATER MAIN REPLACMENT (INVESTIGATE)
	DSCHERMER Total	\$1,704.88						
CTSbsp	MCCAPITAL	\$1,750.00	TFLEMING	Q633258	01/17/201	Z553547	POSTLE R & JAECKLE	SRB1418A - L/M TO INSTALL FLAPPER ON DRAIN PIPE
	MCCAPITAL Total	\$1,750.00						
	CTSbsp Total	\$3,454.88						
DATACT R	DBARRY	\$168.00	SPAOLINI	Q632916	01/13/201	Z596139	WARRE N'S PAINT & DECORATING	DATA CENTER
	DBARRY Total	\$168.00						
DATACT R	DSCHERMER	\$200.00	DSCHERME R	Q632373	12/30/201	Z511909	WESCO	PRO PRESS UNION PRO PRESS TO NPTE
	DSCHERMER Total	\$200.00						
DATACT R	JPACITTO	\$500.00	RPANIK	Q632914	01/13/201	Z596486	DAVIS-ULMER SPRINKLER CO., INC.	SDC - DE-ACTIVATE FIRE SUPPRESSION SYSTEM 1-27-14
DATACT R	JPACITTO	\$622.20	RPANIK	Q633081	01/15/201	Z597630	WESCO	REPLACE BATHROOM FANS IN WOMANS ROOM (X2)
DATACT R	JPACITTO	\$250.00	RPANIK	Q633145	01/16/201	Z598054	DAVIS-ULMER SPRINKLER CO., INC.	DAVIS ULMER CALLED IN FOR FIRE PANEL RESET
DATACT R	JPACITTO	\$6,465.00	WPOTEAT	Q633169	01/16/201	Z598212	WESCO	PURCHASE ALBER BATTERY CELL RECORDER
DATACT R	JPACITTO	\$254.72	RPANIK	Q633287	01/20/201	Z599270	WESCO	PURCHASE SPARE FUSES
DATACT R	JPACITTO	\$2,500.00	STEUGEMA N	Q633474	01/22/201	Z60115	RUSSELE CTRIC INC	EMERGENCY REPAIR CALL IN TO RUSSELECTRIC

# Stock Parts – what is stocked and where to find it

- Can search Parts screen in Famis or use on-line Parts Catalogue
- To use Famis, go to Parts and query description

The screenshot displays the FAMIS Xi software interface for the 'Part' screen. The window title is 'FAMIS Xi (kszweda@prod)'. The menu bar includes 'File', 'Edit', 'Query', 'Record', 'Attachments', 'Window', and 'Help'. The toolbar contains various icons for file operations and navigation. The main form is titled 'Part' and contains the following sections:

- Part Number:** %BATTERY AAA%
- Category:** [Empty]
- General Description:**
  - Commodity: [Empty]
  - Unit of Measure: [Empty]
  - Unit of Purchase: [Empty]
  - ABC Class: [Empty]
  - Status: [Empty]
  - Type: [Empty]
  - Shelf Life: [Empty]
  - MSDS:
  - Shelf Life Days: [Empty]
- Long Description:** [Empty text area]
- Warehouse Information:**

Warehouse	MC	On Order	[Empty]	Calc	Factor	[Empty]
On Hand	[Empty]	Safety Stock	[Empty]	<input type="checkbox"/>	Markup %	[Empty]
Transferred	[Empty]	Reorder Point	[Empty]	<input type="checkbox"/>	Price	.0000
Reserved	[Empty]	EOQ	[Empty]	<input type="checkbox"/>	Sell Price	.0000
		Lead Time	[Empty]		Amount	.00

On the right side of the form, there is a vertical list of buttons: Details, Bins, Bills of Mat'l, Vendors, Substitution, Mfrs, History, Orders, Warehouses, Dates, Reservation, Shelf Life, Multi-Warehouse, UM Conversion, Accounts..., and Alias...

# Parts Form

- On Hand – shows how many in stock
- Reorder Point – when goes below this number it orders the quantity listed in EOQ
- Price – amount you will be charged.

The screenshot shows a software window titled 'Part' with the following details:

- Part Number: 001019
- Category: TOOLS & SHOP SUPPLIES \ BATTERIES \ ALKALINE
- General Description: Commodity ED, Unit of Measure Each, Unit of Purchase Each, ABC Class E, MSDS checked, Status ACTIVE, Type STOCK, Shelf Life None, Shelf Life Days empty.
- Long Description: (Empty text area)
- Warehouse Information: Warehouse RC, On Hand 169.00, Transferred .00, Reserved .00, On Order .00, Safety Stock 144.00, Reorder Point 108.00, EOQ 72.00, Lead Time empty.
- Calculation table:

Factor	
Markup %	
Price	.4131
Sell Price	.4131
Amount	69.82

On the right side, there is a vertical menu with buttons for: Details, Bins, Bills of Mat'l, Vendors, Substitution, Mfrs, History, Orders, Warehouses, Dates, Reservation, Shelf Life, Multi-Warehouse, UM Conversion, Accounts..., and Alias...

# Parts Catalogue

- [http://www.facilities.rochester.edu/protected/famis\\_forms/part\\_catalog/](http://www.facilities.rochester.edu/protected/famis_forms/part_catalog/)

The screenshot shows a web browser window displaying the University of Rochester Facilities and Services Famis Parts Catalog. The browser address bar shows the URL: [https://www.facilities.rochester.edu/protected/famis\\_forms/part\\_catalog/](https://www.facilities.rochester.edu/protected/famis_forms/part_catalog/). The page header includes the University of Rochester logo and the text "EMPLOYEES ONLY University Facilities and Services". A navigation menu contains links for Departments, Absence Report, CSC Control Center, Forms, The bluePRINT, Data, Facilities Notification, and Policies. The main content area is titled "Famis Parts Catalog" and features three search filters: "Commodity" (set to "No Commodity"), "Manufacturer or Part#" (empty), and "Description" (set to "Battery"). A blue "Search" button is positioned below the filters. Below the search area is a table with the following columns: Part #, Vend. Part #, Short Description, WH, Bin, Manufacturer, In Stock, and Part Image. The first row of data is: 000126, ENERGIZER, BATTERY 6V DELANY FLUSH VALVE, MC, EE604, ENERGIZER, 0, and an image of an Energizer battery. The Windows taskbar at the bottom shows the time as 1:34 PM on 10/9/2018.

https://www.facilities.rochester.edu/protected/famis\_forms/part\_catalog/

EMPLOYEES ONLY  
UNIVERSITY of ROCHESTER University Facilities and Services

Departments Absence Report CSC Control Center Forms The bluePRINT Data Facilities Notification Policies

Famis Parts Catalog

Commodity: No Commodity Manufacturer or Part#: Description: Battery

Search

Part #	Vend. Part #	Short Description	WH	Bin	Manufacturer	In Stock	Part Image
000126	ENERGIZER, BATTERY 6V DELANY FLUSH VALVE	BATTERY 6V DELANY FLUSH VALVE	MC	EE604	ENERGIZER	0	

1:34 PM  
10/9/2018



# Stocking a new part

- Driven by the Requestors
- New Equipment that requires maintenance parts
- Equipment Upgrades
- New Buildings
- Something you find you are ordering frequently through the Spot Buy Process
- [http://www.facilities.rochester.edu/support\\_ops/document/StockPartUpdate\\_05.15.pdf](http://www.facilities.rochester.edu/support_ops/document/StockPartUpdate_05.15.pdf)

University of Rochester Facilities & Services  
Support Operations Materials Management

**PARTS UPDATE FORM**

Date Submitted: \_\_\_\_\_

NEW	CHANGE	DELETE	CU	MC	RC
-----	--------	--------	----	----	----

Uof R Stock # \_\_\_\_\_

Manufacturer \_\_\_\_\_  
Manufacturer Part # \_\_\_\_\_  
DESCRIPTION \_\_\_\_\_  
VENDOR \_\_\_\_\_ VENDOR CODE \_\_\_\_\_  
PURCHASE PRICE \_\_\_\_\_ QUOTE # \_\_\_\_\_  
UOM \_\_\_\_\_  
CONTACT \_\_\_\_\_ PHONE \_\_\_\_\_  
How many would you like stocked? \_\_\_\_\_ Minimum\* \_\_\_\_\_ Maximum \_\_\_\_\_  
\* will reorder when the quantity goes below this point

*SIGNATURE REQUIRED: This part is required to be issued within 18 months. If the parts are not issued, or become obsolete, the requesting department must submit a work order number to write off existing stock.*

MECHANIC \_\_\_\_\_ PRINT \_\_\_\_\_  
SUPERVISOR \_\_\_\_\_ PRINT \_\_\_\_\_

FOR MATERIALS MANAGEMENT USE:

BIN LOCATION \_\_\_\_\_ CLASS CODE \_\_\_\_\_  
SAFETY \_\_\_\_\_ REORDER POINT \_\_\_\_\_ EOQ \_\_\_\_\_  
MSDS REQUIRED \_\_\_\_\_  
COMPLETED BY \_\_\_\_\_ DATE \_\_\_\_\_

Questions?