

What can a department do to save time in the creation of FAMIS documents?

A great way to help save time and make your processing time faster is to use the copy function when creating Limited documents, Exempt documents or requisitions. This might be helpful when you are paying the same types of things repeatedly, such as DHL, Fed Ex, monthly water or coffee service, copier rentals or maintenance agreements.

Please see the instructions below for a refresher. Screen 257 can be used for copying requisitions.

Copying A Limited Purchase or Exempt Purchase Document

When you process similar orders over and over (i.e. coffee service), you may find it convenient to copy old limited purchase and exempt purchase documents to new ones. Screen 235 (Exempt) and 245 (Limited) allows you to retrieve a purchase document that you previously entered and copy its line items to an existing or newly created limited purchase order.

Copying Purchase Items to a New Document

Go to the document that you would like to copy (Screen 235 or 240). Then go to screen 233 or 245. Your existing document number is on the first line. Tab down to New Doc and enter L0 (zero). If you want to copy to an existing document, tab down to the third line and enter that L-doc number. Your cursor goes to the Dt. (date) field. Enter the new order date. Now it shows you the PF11 pop up from screen 240 showing the department and sub department codes that are listed on the original document. These are attached to your FAMIS access and the account(s) being used to pay the invoice.

If you want to add any others, you may do it now. Press PF4 to get out of the pop up when you are through. If you have no additions, just press PF4.

Now it shows the line items from our original document.

Enter a "Y" on the Header Screen line. Enter a 'c' on the function line before each line item that you want to copy. You can copy one item or all. When you have finished selecting, press <enter>. This action will take you to Screen 240 with a new document number. Write it on the invoice. Read

each screen and line item to be sure that the line items match what was purchased and the account is still the same. You can make any changes to the line items like account, quantity and price. Close and route and create the Invoice Header on Screen 341 and you are done.