Introduction

The purpose of this manual is to assist in accessing and utilizing information in the purchasing section of the Financial Accounting Management Information System (FAMIS). FAMIS is an accounting system that responds to financial regulations applicable to educational institutions. All applications access a common database that allows different users to access identical information. Other applications include Financial Accounting, Accounts Payable, Accounts Receivable, Sponsored Research, and Fixed Assets. Manuals for these applications are being developed or are currently available.

The materials are grouped according to functions. All associated screens and processing information are included along with field descriptions. The required fields are designated by a diamond symbol (◆). Data entry information (Help) can be accessed on some screen fields with the use of the PF2 key or typing an asterisk (*) or question mark (?) in the field.

By utilizing the information and guidelines contained in this manual, a user should be able to access purchasing information, as well as create and modify bid documents.

The FAMIS User Manuals are in a constant state of revision, due to screen updates, changes in procedures, or any one of a multitude of reasons. If you would like to make suggestions or call attention to errors, please contact us at (979) 458-6464, or copy the page with the error, note the correction or suggestion and send it to:

College Station based: FAMIS Services
The Texas A&M University System
1144 TAMU
College Station, TX 77843-1144

Non-College Station based: FAMIS Services
The Texas A&M University System
301 Tarrow Street
College Station, TX 77840-7896
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<th>Description</th>
<th>Page</th>
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</thead>
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<td>420</td>
<td>Create Master Bid Lists</td>
<td>III-5</td>
</tr>
<tr>
<td></td>
<td>- Create a New Master List</td>
<td>III-6</td>
</tr>
<tr>
<td></td>
<td>- Add to an Existing Master List</td>
<td>III-6</td>
</tr>
<tr>
<td>421</td>
<td>Copy a Master List to a Specific List</td>
<td>III-9</td>
</tr>
<tr>
<td></td>
<td>- Create a New Specific List</td>
<td>III-10</td>
</tr>
<tr>
<td></td>
<td>- Add to an Existing Master List</td>
<td>III-10</td>
</tr>
<tr>
<td>422</td>
<td>Create a Specific Bid List</td>
<td>III-12</td>
</tr>
<tr>
<td></td>
<td>- Create a New Specific List</td>
<td>III-13</td>
</tr>
<tr>
<td></td>
<td>- Add to an Existing Master List</td>
<td>III-13</td>
</tr>
<tr>
<td></td>
<td>- Create a New Specific Bid List</td>
<td>III-13</td>
</tr>
<tr>
<td>426</td>
<td>Copy an Existing Specific List to a New Specific List</td>
<td>III-16</td>
</tr>
<tr>
<td></td>
<td>- Create a New Specific Bid List</td>
<td>III-17</td>
</tr>
<tr>
<td>423</td>
<td>Modify the Bidders for a Particular List</td>
<td>III-20</td>
</tr>
<tr>
<td></td>
<td>- Add Additional Bidders to the List</td>
<td>III-21</td>
</tr>
<tr>
<td></td>
<td>- Remove Bidders from the List</td>
<td>III-21</td>
</tr>
<tr>
<td>424</td>
<td>Modify the Bid List Header</td>
<td>III-24</td>
</tr>
<tr>
<td></td>
<td>- Remove Commodity Codes from a Specific Bid List</td>
<td>III-24</td>
</tr>
<tr>
<td>428</td>
<td>Set/Reset Bid List Flags</td>
<td>III-26</td>
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<td>430</td>
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<td>III-28</td>
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</tbody>
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### IV Bid List Inquiry

<table>
<thead>
<tr>
<th>Screen</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>480</td>
<td>Master List Browse</td>
<td>IV-4</td>
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<tr>
<td>481</td>
<td>Display Master Lists by Commodity Code</td>
<td>IV-6</td>
</tr>
<tr>
<td>497</td>
<td>Display Bidders for a Master List</td>
<td>IV-8</td>
</tr>
<tr>
<td>485</td>
<td>Specific List Browse</td>
<td>IV-10</td>
</tr>
<tr>
<td>486</td>
<td>Display Specific Lists by Open Date and Time</td>
<td>IV-14</td>
</tr>
<tr>
<td>487</td>
<td>Display Specific Lists by Buyer, Open Date, and Time</td>
<td>IV-16</td>
</tr>
<tr>
<td>488</td>
<td>Display Specific Lists by Commodity, Open Date, and Time</td>
<td>IV-18</td>
</tr>
<tr>
<td>498</td>
<td>Display Bidders for a Specific List</td>
<td>IV-20</td>
</tr>
</tbody>
</table>

### V Bidder Maintenance

<table>
<thead>
<tr>
<th>Screen</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>452</td>
<td>Create/Maintain Bidder Information</td>
<td>V-3</td>
</tr>
<tr>
<td></td>
<td>- Create a New Local Bidder</td>
<td>V-4</td>
</tr>
<tr>
<td></td>
<td>- Modify an Existing Local Bidder</td>
<td>V-4</td>
</tr>
<tr>
<td></td>
<td>- Display a State Bidder</td>
<td>V-4</td>
</tr>
<tr>
<td></td>
<td>- Assign a Bidder Identification Number</td>
<td>V-4</td>
</tr>
<tr>
<td></td>
<td>- Bidder Search and Select</td>
<td>V-4</td>
</tr>
<tr>
<td>453</td>
<td>Relate Local Bidders with Their Commodities</td>
<td>V-8</td>
</tr>
<tr>
<td></td>
<td>- Add Multiple Commodities to a Local Bidder</td>
<td>V-8</td>
</tr>
</tbody>
</table>
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<table>
<thead>
<tr>
<th>Screen</th>
<th>Description</th>
<th>PAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Screen 454</td>
<td>Bidder Flag Maintenance</td>
<td>V-11</td>
</tr>
<tr>
<td>Screen 455</td>
<td>Copy State Bidder Commodities</td>
<td>V-13</td>
</tr>
<tr>
<td>Screen 456</td>
<td>Copy a FAMIS Vendor to the Bidder File</td>
<td>V-15</td>
</tr>
<tr>
<td>Screen 457</td>
<td>Copy a Bidder to a FAMIS Vendor</td>
<td>V-18</td>
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<td>Screen 459</td>
<td>Copy HUB Data to Local Bidder</td>
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<td>Screen 463</td>
<td>View Commodities for a Bidder</td>
<td>V-26</td>
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</tr>
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</table>

**VI Commodity Maintenance**

<table>
<thead>
<tr>
<th>Screen</th>
<th>Description</th>
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<tr>
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<td>Create/Modify Commodity Codes</td>
<td>VI-3</td>
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<tr>
<td></td>
<td>Create New Local Commodity Codes</td>
<td>VI-3</td>
</tr>
<tr>
<td></td>
<td>Modify Existing Local Commodity Codes</td>
<td>VI-3</td>
</tr>
<tr>
<td></td>
<td>Commodity Aliases</td>
<td>VI-4</td>
</tr>
<tr>
<td>Screen 458</td>
<td>Create/Modify Commodity Aliases</td>
<td>VI-6</td>
</tr>
<tr>
<td></td>
<td>Create a New Commodity Alias</td>
<td>VI-6</td>
</tr>
<tr>
<td></td>
<td>Drop an Existing Commodity Alias</td>
<td>VI-6</td>
</tr>
<tr>
<td></td>
<td>Commodity Search</td>
<td>VI-7</td>
</tr>
<tr>
<td></td>
<td>Drop a Commodity Alias</td>
<td>VI-7</td>
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</table>

**VII Commodity Inquiry**

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<th>PAGE</th>
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</thead>
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<tr>
<td>Screen 460</td>
<td>Browse Commodity Codes by Name</td>
<td>VII-5</td>
</tr>
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<td>Screen 461</td>
<td>Search for a Commodity by Number</td>
<td>VII-7</td>
</tr>
<tr>
<td></td>
<td>Search by Commodity Name or Buyer</td>
<td>VII-7</td>
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</table>

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<thead>
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<th>Description</th>
<th>PAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instructions</td>
<td>VIII-3</td>
</tr>
<tr>
<td>Standard PF Key Definitions</td>
<td>VIII-8</td>
</tr>
<tr>
<td>Bids and Commodities Screens List</td>
<td>VIII-11</td>
</tr>
<tr>
<td>Glossary</td>
<td>VIII-14</td>
</tr>
</tbody>
</table>
Bids and Commodities Menus

The following menus show the screens available in the Bids and Commodities module of FAMIS.

**Menu M41 - Commodity and CMBL Bidders Menu**

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>M41 Commodity and CMBL Bidders</td>
<td>11/04/13 10:04</td>
</tr>
<tr>
<td>Screen: ___</td>
<td>FY 2014 CC 02</td>
</tr>
<tr>
<td>* -------- Commodities ------ *</td>
<td>*--Central Master Bidders List - *</td>
</tr>
<tr>
<td>451 Create/Maint Commodity Master</td>
<td>452 Bidder Create/Maint</td>
</tr>
<tr>
<td></td>
<td>454 Bidder Flag Maintenance</td>
</tr>
<tr>
<td></td>
<td>455 Copy State Bidder Commodities</td>
</tr>
<tr>
<td></td>
<td>456 Copy FAMIS Vendor to Bidder</td>
</tr>
<tr>
<td></td>
<td>457 Copy Bidder to FAMIS Vendor</td>
</tr>
<tr>
<td></td>
<td>459 Copy HUB to Bidder</td>
</tr>
<tr>
<td>* ------- Inquiry ----------- *</td>
<td>*-------- Inquiry -----------------?</td>
</tr>
<tr>
<td>460 Name Search List of Commodities</td>
<td>463 Commodities by Bidder</td>
</tr>
<tr>
<td>461 List Commodities By Number</td>
<td>464 Bidders by Commodity</td>
</tr>
</tbody>
</table>

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

Hmenu Help  EHelp

**Menu M42 - Bids and Bid Lists Menu**

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>M42 Bids and Bid Lists Menu</td>
<td>11/04/13 10:04</td>
</tr>
<tr>
<td>Screen: ___</td>
<td>FY 2014 CC 02</td>
</tr>
<tr>
<td>* --- Bid Documents --- *</td>
<td>* --- Bid List Maint. --- *</td>
</tr>
<tr>
<td>410 Header Create/Modify</td>
<td>420 Master List Create</td>
</tr>
<tr>
<td>411 Shipping &amp; Text</td>
<td>421 Copy Master to Specific</td>
</tr>
<tr>
<td>412 Additional Text</td>
<td>422 Specific List Create</td>
</tr>
<tr>
<td>413 Bid Sole Source</td>
<td>423 List Vendor Modify</td>
</tr>
<tr>
<td>414 Item Create/Modify</td>
<td>424 List Header Maintenance</td>
</tr>
<tr>
<td>415 Item Desc. Cont'd</td>
<td>426 Copy Specific to Specific</td>
</tr>
<tr>
<td>416 Document Close</td>
<td>428 List Flag Maintenance</td>
</tr>
<tr>
<td>417 Transfer</td>
<td>430 Spec List Response</td>
</tr>
<tr>
<td>418 Flag Maintenance</td>
<td></td>
</tr>
<tr>
<td>419 Bid Notes</td>
<td></td>
</tr>
<tr>
<td>216 Bid On-demand Print</td>
<td>456 Copy FAMIS to Bidder</td>
</tr>
<tr>
<td></td>
<td>457 Copy Bidder to FAMIS Vendor</td>
</tr>
</tbody>
</table>

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

Hmenu Help  EHelp
### Menu M44 - Bid List Inquiry Menu

<table>
<thead>
<tr>
<th>Screen: ___</th>
</tr>
</thead>
<tbody>
<tr>
<td>* ---- Master List Inquiry -------- *</td>
</tr>
<tr>
<td>480  Master List Browse</td>
</tr>
<tr>
<td>481  Master List Browse by Commodity</td>
</tr>
<tr>
<td>497  Master List Bidders</td>
</tr>
<tr>
<td>* --- Specific List Inquiry ------- *</td>
</tr>
<tr>
<td>485  Specific List Browse</td>
</tr>
<tr>
<td>486  Specific List Browse by Open Date/Time</td>
</tr>
<tr>
<td>487  Specific List Browse by Buyer/Date/Time</td>
</tr>
<tr>
<td>488  Specific List Browse by Comm/Date/Time</td>
</tr>
<tr>
<td>498  Specific List Bidders</td>
</tr>
</tbody>
</table>

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

Hmenu Help  EHelp
Bids and Commodities – Basic Concepts

The bids and commodities portion of the FAMIS system is built to accommodate the concepts and designs of the State of Texas Central Master Bid List, commonly known as the CMBL.

Files Used for Bids and Commodities in FAMIS

**State Commodity File**
Commodity codes are used to categorize goods and services. In FAMIS, commodities are related to each bidder who provides the goods and services.

The FAMIS commodity file is loaded weekly from the State. The State currently uses the commodity codes from the NIGP, National Institute of Government Purchasers. This file contains class and item information only. When the State list is loaded, all commodity codes that are currently on the FAMIS file, but are not found on the State file are frozen.

> After six months, any frozen commodity not on the State tape will be marked as deleted.

**State Central Master Bidders List (CMBL) Files**
Weekly, FAMIS loads files containing information on the bidders that are registered with the State and therefore are on the State's Central Master Bidders List (CMBL). Changes that are made to these files at the State will only be reflected in FAMIS when they are re-loaded the following week.

**Bidder Commodity Relationship File**
One file loaded into FAMIS contains the State-defined bidder commodity relationships. This file details which commodities each bidder provides for purchase. Included in this file are the bidder identification number, the bidder name, and bidder address information. Included also are the State districts that each bidder services.

**State Bidder File**
The State bidder file is loaded into FAMIS from the Texas Building and Procurement Commission (TBPC). Changes to the State bidder file will only be seen in FAMIS after the files containing the changes are copied anew from the TBPC.

This file is loaded from the State on a weekly basis.

**Local Bidder File**
The local bidder file is created and maintained by each A&M System member on-line in FAMIS. Vendors from a local area who want to bid on purchases to be made with local money can be entered directly into FAMIS. Any changes made on-line to the local file will be immediately updated.
Process for Creating Bid Document
(Also, see the chart on the following page)

Goal
Your goal in using the Bids and Commodities Module is to print bid documents to send to qualified vendors.

Supporting Files
Before you can create and print bid documents, there are supporting files that must be in place – the Commodity File and the Bidder File. Each of these files has a State component that is loaded to FAMIS from the State files. In addition, each of these files can have local records that are input by FAMIS users.

Another supporting file is the Bidder/Commodity Relationship File. The State component of this file is the CMBL, or Central Master Bidders List. Again, this component is loaded to FAMIS from a file provided by the State. You can add local relationships by directly inputting them to FAMIS.

Optional Master Bidder List
Optionally, you can create a Master Bidder List. This can help you organize and maintain a list of “preferred bidders” or a list of bidders used on a regular basis for specific goods and services.

Creating Bid Documents
There are three ways to create a bid document:

a. Screen 257 Transfer a PRQ (Requisition) to a new bid document

b. Screens 410-419 Create a new bid document using Screen 410 through Screen 419.

c. Screen 417 Copy an existing bid document to a new document

You cannot copy Purchase Order (PO) to a Bid.
Interrelations of Bid Module

- **State Load** (State Commodity File)
  - Weekly Download
  - State Uses NIGP (National Institute of Government Purchases)

- **Screen 451** (Local Commodity File)

- **CMBL Load** (State Bidder File)
  - Screen 452 (Local Bidder File)

- **Screen 456** (Copy Vendor to Bidder)

**COMMODITY FILE**

**BIDDER FILE** (Bid Vendors)

**BIDDER/COMMODITY RELATIONSHIP FILE**

**MASTER BID LIST**

**BID DOCUMENT**
Screens 410-416

**SPECIFIC BID LIST OF QUALIFIED VENDORS**

**PRINTED BIDDER DOCUMENTS**

T:\Fa\DOC\WRKNPRCS\Student\Bid Flow Chart.vsd
TEXAS A&M UNIVERSITY

BIDS and COMMODITIES

PROCEDURES
Requisition to Bid Checklist

TAMU Procedures
As of 11/05/01

Screen 257 –

- Enter requisition number in **Doc** field and press <ENTER>.
- In **New Class** field, type “B.”
- In **Doc** field, type “B0” (B + zero).
- Enter the fiscal year in the **FY** field.
- Type appropriate category in the **Cat** field (from category on Screen 250) and press <ENTER>.
- If more than 10 items do not enter "Y" in the **Header Screen** field.
- In the **Func** field, type "T" to transfer items to bid document. When all items have been transferred, answer "Y" to header.
- Pop-up will appear to enter routing path. Enter appropriate path for individual buyer. Screen will automatically transfer to Screen 410 with bid number.

**Example:**

<table>
<thead>
<tr>
<th>257 Req. Line Item Copy/Transfer</th>
<th>01/17/07 12:03</th>
</tr>
</thead>
<tbody>
<tr>
<td>Screen: ___ Doc: R000018 Item: ____ From Vndr:</td>
<td>FY 2007 CC 02</td>
</tr>
<tr>
<td>New Class: ___ Doc: B0 FY: 2007 Cat.: ___ Vndr: _______ Dt: _______</td>
<td></td>
</tr>
<tr>
<td>Exist Class: ___ Doc: ____</td>
<td></td>
</tr>
<tr>
<td>------------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Header Screen: _ Document has 6 items, including text and deleted items</td>
<td></td>
</tr>
<tr>
<td>Func Item  ----- Desc ----- Quantity Unit Price UOM Ext. Price Cd</td>
<td></td>
</tr>
<tr>
<td>_ 1.0 KNUCKLE COVERLET 48.00 6.1000 BOX 292.80 X</td>
<td></td>
</tr>
<tr>
<td>_ 2.0 LENKO TAPE P #855 6.00 180.0000 CS 1080.00 X</td>
<td></td>
</tr>
<tr>
<td>_ 3.0 GATORADE 850.00 15.5000 CS 13175.00 X</td>
<td></td>
</tr>
<tr>
<td>_ 4.0 GATORADE - BAG-N- 240.00 15.5000 CS 3720.00 X</td>
<td></td>
</tr>
<tr>
<td>_ 5.0 ALOE VERA GEL 40.00 30.9400 GAL 1237.60 X</td>
<td></td>
</tr>
<tr>
<td>_ 6.0 ALOE AID - 4 OZ 12.00 3.6300 EA 43.56 X</td>
<td></td>
</tr>
</tbody>
</table>

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

Hmenu Help EHelp

Warns
Bids and Commodities – Basic Concepts (cont’d)

**Screen 410**

- Enter buyer's initials in the **Buyer** field.
- Verify information in the **Type Funds** field.
- Enter bid opening date in the **Opening** field (set date for 2 weeks plus 2 days unless otherwise noted by buyer).
- **Doc** field (Bid document number) and **Bid List** field will then have the same number and the link is visible. To use the same ID for the Bid List, type Bid # (document number).

**Example:**

<table>
<thead>
<tr>
<th>410 Bid Header Create/Modify</th>
<th>01/17/07 12:04</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>NOTES</strong></td>
<td>FY 2007 CC 02</td>
</tr>
<tr>
<td><strong>Screen:</strong>  Doc: B000003</td>
<td>Doc. Year: 2000 Total Amount: 19548.96</td>
</tr>
<tr>
<td>&lt;&lt; Dates &gt;&gt;</td>
<td></td>
</tr>
<tr>
<td>Document: 03/16/1999</td>
<td>Cat.: RO User Ref: 300090-1865  St Req:</td>
</tr>
<tr>
<td>Required: 05/01/1999</td>
<td>Contact Person: MARK MASON Ph: 409-555-3333</td>
</tr>
<tr>
<td>Start : 09/01/1999</td>
<td>Buyer: SDU CARLA C CARLSON Ph: 409-888-2222</td>
</tr>
<tr>
<td>End : 08/31/2000</td>
<td>Research (Y/N): N Type Funds: L Type Order: LOC</td>
</tr>
<tr>
<td>Change : No</td>
<td>Print Doc? 04/20/1999 Dept: ATHL SubDept:</td>
</tr>
<tr>
<td>Opening : 04/29/1999</td>
<td>Time: 02:00 PM Dept: ATHL SubDept:</td>
</tr>
<tr>
<td>Doc Summary: 1999-2000 TRAINING ROOM SUPPLIES Bid List: B000003</td>
<td></td>
</tr>
<tr>
<td>&lt;&lt; Suggested Vendors &gt;&gt;</td>
<td></td>
</tr>
<tr>
<td>Vn ID: 1vvvvvvvvv0 or FEI: _______</td>
<td>Vn ID: 1vvvvvvvvv1 or FEI: _______</td>
</tr>
<tr>
<td>ALERT SERVICES INC___________</td>
<td>A-ATHLETIC AND MEDICAL SUPPLY_</td>
</tr>
<tr>
<td>Addr: PO BOX 1000___________</td>
<td>Addr: PO BOX 30000__________</td>
</tr>
<tr>
<td>SAN MARCOS TX 78667__________</td>
<td>HOUSTON TX 77249-0000_________</td>
</tr>
<tr>
<td>Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---</td>
<td></td>
</tr>
<tr>
<td>Hmenu Help EHlp Next SResn EResn Notes AdVen AdDpt</td>
<td></td>
</tr>
</tbody>
</table>

**Screen 411**

- Enter text codes and/or text, if necessary.

**Example:**

<table>
<thead>
<tr>
<th>411 Bid Shipping and Text</th>
<th>01/17/07 12:05</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>NOTES</strong></td>
<td>FY 2007 CC 02</td>
</tr>
<tr>
<td><strong>Screen:</strong>  Doc: B000003</td>
<td></td>
</tr>
<tr>
<td>Ship To</td>
<td>Invoice To</td>
</tr>
<tr>
<td>Address Nbr: ___</td>
<td>Address Nbr: 694</td>
</tr>
<tr>
<td>Name: KYLE FIELD STADIUM___</td>
<td>Name: ATHLETIC ACCOUNTING OFFICE_</td>
</tr>
<tr>
<td>Addr: ATTN: MARK MASON____</td>
<td>Addr: P. O. BOX 30000__________</td>
</tr>
<tr>
<td>City: COLLEGE STATION______</td>
<td>City: COLLEGE STATION______</td>
</tr>
<tr>
<td>State: TX</td>
<td>State: TX</td>
</tr>
<tr>
<td>Zip: 778431228</td>
<td>Zip: 778423017</td>
</tr>
<tr>
<td>Country: __</td>
<td>Country: __</td>
</tr>
<tr>
<td>Phone:</td>
<td>Phone:</td>
</tr>
<tr>
<td>FAX: __</td>
<td>FAX: __</td>
</tr>
<tr>
<td>Text codes: 031 054 007 044 073 012 009 080 084 095</td>
<td></td>
</tr>
<tr>
<td>Additional</td>
<td>RE-BID WITH CHANGE IN SPECIFICATIONS FOR__</td>
</tr>
<tr>
<td>Text Lines: ITEM 4._________</td>
<td>Continued</td>
</tr>
<tr>
<td>Note: __</td>
<td></td>
</tr>
<tr>
<td>More text lines: _</td>
<td></td>
</tr>
<tr>
<td>Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---</td>
<td></td>
</tr>
<tr>
<td>Hmenu Help EHlp Next SResn EResn Notes AdVen AdDpt</td>
<td></td>
</tr>
</tbody>
</table>
Screen 414 –

- Enter appropriate commodity code in the **Commodity** field.
- Change description in the **Desc** field, as needed. **You must proofread!**

**Example:**

```
414 Bid Line Item Create/Modify  01/17/07 12:06
FY 2007 CC 02
Screen: ___  Doc: B000003  Item: _1.0

<table>
<thead>
<tr>
<th>Estimated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quantity</td>
</tr>
<tr>
<td>UOM</td>
</tr>
<tr>
<td>Unit Price</td>
</tr>
<tr>
<td>Extended Price</td>
</tr>
<tr>
<td>______</td>
</tr>
<tr>
<td>48.00</td>
</tr>
<tr>
<td>BOX</td>
</tr>
<tr>
<td>6.1000</td>
</tr>
<tr>
<td>292.80</td>
</tr>
</tbody>
</table>

Commodity: 805
Proc Cd: X
Part Nbr: Desc: KNUCKLE COVERLET
100/BOX
#01390

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

Screen 422 –

- You must enter a valid code in the **Commodity** field (###-##).
- In the **Type of Funds** field, enter "S" for State, "L" for local and press <ENTER>, if State funds (check accounts on Screen 254). A list of vendors will be displayed. Type "X" in the **Sel** (Select) field to select vendors. If not on list notify buyer.

**Example:**

```
422 Specific List Create  01/17/07 12:07
FY 2007 CC 02

> Screen: ___  Commodity: 805  Spec. List: B700011________
> District: __  Type of funds: S  Add to existing List: Y
Panel: 01 More >>

Commodity Name: SPORTING AND ATHLETIC GOODS

<table>
<thead>
<tr>
<th>Sel</th>
<th>Bidder Name</th>
<th>HUB</th>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>X</td>
<td>S &amp; S ATHLETICS</td>
<td>N MILL ST</td>
<td>COLCHESTER CT</td>
</tr>
</tbody>
</table>

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
```
Screen 423 –

- Check list of vendors to verify selection then return bid packet to buyer for closing.

Example:

```
423 Bid List Bidder Modify 01/17/07 12:13
> Screen: ___ Type: M List: ELECTRICAL________ List by Commodity: Y

Buyer:
Comment:
Panel: 01 More >>

Bdr F Typ Bidder Name Commodity Org G Bus Off St Stat
--- --- ----------------------- --------------- ---  -  ---  ---  ----
_ L WILSON, WILLOW 175-42 W Y

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
Hmenu Help EHelp
```

Screen 288 –

- Review bid document and verify that all information has been added/deleted.

Example:

```
288 Document Summary 01/17/07 12:15PM
FY 2007 CC 02
Screen: ___ Doc: B000003 Number of Desc Lines: 5_ Page: 1__ Of 13

INVOICE TO: SHIP TO:
ATHLETIC ACCOUNTING OFFICE KYLE FIELD STADIUM
P. O. BOX 30000 ATTN: MARK MASON
COLLEGE STATION TX 77842-3017 COLLEGE STATION TX 77843-1228

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
Hmenu Help EHelp
```
Screen 416 –

- Type “Y” to close bid document.

Example:

```
Screen: ___ Doc: B000003

Document: 03/16/1999   Cat: RO   User Ref: 3000901865
Start : 09/01/1999   Contact Person: MARK MASON
End : 08/31/2000   Buyer:  SDR     CARLA C CARLSON
Required: 05/01/1999   Research (Y/N): N    Type Funds: L   Type Order: LOC
Change :              No.      Last Print Date: 04/20/1999
Doc Summary: 1999-2000 TRAINING ROOM SUPPLIES

Close Document?  Y
```

- Place bid number on calendar for corresponding day.
- Buyer must sign blank copy of bid before bid is sent out.
- When buyer returns bid packet to either be sent out or faxed, make folder with bid number, buyer’s initials and date of bid opening on tab.
- Remember to stamp each bid with buyer’s signature stamp before sending/faxing.
- Place bid packet in bid file under bid opening date.
- If faxing out bid, remember to print transmission sheet.

Go to Screen 910 (In Box) –

- Select document and put document on "HOLD.”
- Press (PF9) and add note stating bid opening date.

Example:

```
Screen: ___ 01/17/07 12:18

Action: HLD

*ROUTING NOTES
```
Bid to Purchase Order Checklist

TAMU Procedures
As of 11/05/01

Screen 417 –

- Enter bid document number and press <ENTER>.
- In New Class field, enter "P."
- In Doc field, enter "PO."
- Enter fiscal year in the FY field.
- Enter category in the Cat field and press <ENTER>.
- If more than 10 items, do not answer yes to header.
- In the Func field, enter "T" to transfer items to bid document.
- When all items have been transferred, answer "Y" to header.
- Pop-up screen will appear to enter routing path. Enter appropriate path for individual buyer. (See hand-out.) Screen will automatically transfer to Screen 220 with purchase order number.

Example:

<table>
<thead>
<tr>
<th>417 Bid Line Item Copy/Transfer</th>
<th>01/17/07 12:19</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY 2007 CC 02</td>
<td></td>
</tr>
<tr>
<td>Screen: ___ Doc: B000003 Item: ____ From Vndr:</td>
<td></td>
</tr>
<tr>
<td>New or Exist Class: _ Doc: _______ FY: 2007 Cat.: _ Vndr: ___ Dt: _______</td>
<td></td>
</tr>
<tr>
<td>Header Screen:</td>
<td>Document has 6 items, including text and deleted items</td>
</tr>
<tr>
<td>Proc Item          Desc        Quantity Unit Price UOM Ext. Price Cd</td>
<td></td>
</tr>
<tr>
<td>T                 KNUCKLE COVERLET 48.00 6.1000 BOX 292.80 X</td>
<td></td>
</tr>
<tr>
<td>_                 LENKO TAPE P #855 6.00 180.0000 CS 1080.00 X</td>
<td></td>
</tr>
<tr>
<td>3.0               GATORADE 850.00 15.5000 CS 13175.00 X</td>
<td></td>
</tr>
<tr>
<td>4.0               GATORADE - BAG-N- 240.00 15.5000 CS 3720.00 X</td>
<td></td>
</tr>
<tr>
<td>5.0               ALOE VERA GEL 40.00 30.9400 GAL 12375.00 X</td>
<td></td>
</tr>
<tr>
<td>6.0               ALOE AID - 4 OZ 12.00 3.6300 EA 43.56 X</td>
<td></td>
</tr>
</tbody>
</table>

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

Warns
Screen 220 –

- Enter the type of order in the Type Order field, and the appropriate code in the PCC Code field (i.e. contract, spot, etc. - see PCC Code card).
- If vendor’s bid references a quote number, enter the number in the Vndr Quote # field.
- In Vendor Reference field, enter name of person who signed the bid and their telephone number.
- Calculate delivery date from date given on bid and enter in Delivery Date field.
- In Term field enter from bid (i.e. N 30).
- In FOB field enter whether shipping will be paid by us for the vendor will pick up these charges. You can use question mark (?) help on this field.
- Under headings for Bidding Vendor, list three vendors who may have responded to the bid including the awarded vendor. If less than three, list whoever responded. If sole source, list the sole source vendor with vendor contact and pricing or if they responded with a no bid (NB) or no response (NR). These fields must be completed.

Example:

```
220 PO Header Create/Modify      DELL MARKETING LP              01/17/07 13:11
Screen: ___   Doc: P600370
Vendor: 1vvvvvvvvvJ        Total Amount: 7964.95
Doc. Year: 2006                  St. Req: ___________
<< Dates >>   Doc. Year: 2006                  St. Req: ___________
FY 2007  CC 02
Screen: ___   Doc: P600370
Vendor: 1vvvvvvvvvJ        Total Amount: 7964.95
Doc. Year: 2006                  St. Req: ___________
<< Dates >>   Doc. Year: 2006                  St. Req: ___________
Vendor: 1vvvvvvvvvJ        Total Amount: 7964.95
```

Reason Not Awarded to Low Bidder:
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
Hmenu Help  EHelp Addr  Next  Items Resn  Notes VTerm AdDpt
Screen 221 –

- Clean up text codes. Remove codes that specifically deal with the bid process.
- Add codes that buyer indicates to be listed on the purchase order.
- Delete or add text as indicated.

Example:

```
221 PO Shipping and Text          DELL MARKETING LP          01/17/07 13:12
Screen: ___ Doc: P600370

Ship To     Address Nbr: 169     Invoice To     Address Nbr: 169
Name: DEAN OF EDUCATION         Name: DEAN OF EDUCATION
Addr: HARRINGTON BLDG. ROOM 804 Addr: HARRINGTON BLDG. ROOM 804
          4222 TAMU

City:       State: TX
Ship: 7784342222   Country:      Zip: 7784342222   Country:      Phone:         FAX: __________

Text codes: 066
Additional Text Lines: 65
```

More text
Screen 224 –

- Remember that FAMIS does not word wrap. Pay careful attention to the length of lines that are typed and make all text uniform. (Ex. If text has previously been typed in lowercase, continue with lowercase and likewise using uppercase.)
- Enter dollar amount of awarded vendor as indicated on bid.
- Enter commodity code. Descriptive text should match the bid. If vendor bid alternate and was accepted by department, description must match item that was provided as an alternate. Under accounting information the FY must match the year order is placed. (Ex. P9xxxxx must have a FY of 1999). Once all items have been addressed, return packet to buyer to close order. When buyer returns packet after closing, place in print file. When print is delivered it will be matched up with the purchase order and given back to the buyer for signature.

Example:

<table>
<thead>
<tr>
<th>224 P.O. Line Item Create/Modify</th>
<th>DELL MARKETING LP</th>
<th>11/10/09 11:22</th>
</tr>
</thead>
<tbody>
<tr>
<td>Screen: ___ Doc: P600370 Item: __1.0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>FY 2010 CC 02</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quantity UOM Unit Price -- Discount -- Extended Price</td>
<td></td>
<td></td>
</tr>
<tr>
<td>____1.00 EA______7964.9500 _ ___________ 7964.95</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Part Nbr: _______________ Desc: Server, PowerEdge 2850 per _______________</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TIBH: _ Quote #: E006582530 ____________________________</td>
<td></td>
<td></td>
</tr>
<tr>
<td>FY  CC ---- Account ---- Pct. Amt $</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2006 02 225720 00000 5787 100.00 ____________________________</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>Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hmenu Help EHelp Next Notes CAcct MAcct</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
INVITATION FOR BID — RETURN SEALED BIDS TO:

Texas A&M University
Department of Purchasing Services
P.O. Box 20113
College Station, TX 77842-0013
Phone 979-845-3425
Fax 979-86-3000

09/28/2001
Page 1

OPENING DATE: 10/03/2001
at 2:00PM (CST)

Bid No: 820014

Bid to be "F.O.B. AGENCY RECEIVING" FREIGHT PREPAID AND ALLOWED UNLESS OTHERWISE SPECIFIED BELOW.

Destination of Goods:
Texas A&M. Experiment Station
College Station, TX 77843

Vendor Bid Number:

Bid instructions are on next page for vendor ID number.

BIDDER MUST SIGN BELOW
FAILURE TO SIGN WILL DISQUALIFY BID

Authorized Signature
Print or Type Name
Title
Date

Fax bids/offers accepted fax # 979-845-3800.
Please submit bid in duplicate.

Bidder must bid for destination or give an estimate of freight charges that will be used in the bid evaluation.

Delivery may be a factor in the award. Please quote best delivery.

1. CCD Camera with the following specifications:

- Max. Line/Frame Rate: 1Mfps (15 bursts/sec. of 17 frames)
- Resolution: 240 x 240 Pixels
- Data format: 4 x 12-bit RGB22 or YUV
- Dynamic range: 5200:1
- Responsivity: 23.9mV/s (m/s/cm²) x 656cm.
- Pixel size: 35.6mm x 55 µm
- Aperture: 13.4 mm x 13.4 mm
- Lens mount: C-Mount
- Data rate: 4x10 Mhz
- Nominal Gain Range: 1 or 4x
- Size: 94x94x32mm

Terms:
FOB destination, Freight prepaid and allowed.

Total

Delivery in
Days

Check below if preference claimed under Rule 1 TAC 133.6

☐ Texas resident bidder
☐ Texas produced supplies, materials, equipment, or agricultural products
☐ USA produced supplies, materials, equipment, or agricultural products
☐ Other (See 113.6 note page)

Purchasing agent for Texas A&M University

*Signature*
<table>
<thead>
<tr>
<th>Item Description</th>
<th>Qty</th>
<th>UOM</th>
<th>Unit Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mass 0.85 kg</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Operating Temp: 10-45 C</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Power Supply: +5V, -5, +15V</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Power Dissipation: 3DW</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vendor's Telephone No:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vendor's Fax No:</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

INVITATION FOR BID - RETURN SEALED BIDS TO:

TEXAS A&M UNIVERSITY
DEPARTMENT OF PURCHASING SERVICES
P.O. BOX 80013
COLLEGE STATION, TX 77842-8013
PHONE 734-845-3425 FAX 734-845-8600

BIDDING DEADLINE 10/03/2001

BID NO: E0134

VENDOR: C380014
ITEMS BELOW APPLY TO AND BECOME A PART OF TERMS AND CONDITIONS OF BID. ANY EXCEPTIONS THERETO MUST BE IN WRITING.

1. REQUIREMENTS

1.1 Seller must comply with all rules, regulations and statutes applicable to the State of Texas in the execution of this order.

1.2 Payment must be authorized in a 'cash on delivery' fashion, as indicated. Any trade discounts included must be net and delivered on or before payment is due. Failure to meet the terms of said contract will result in the assessment of interest on the outstanding balance. Failure of goods to arrive promptly may result in the assessment of an additional charge. Failure to meet the terms of said contract will result in the assessment of an additional charge.

1.3 Bid shall be submitted on the form. If bid shall be submitted on the form, it shall be considered the accepted terms and conditions of sale. Any changes to the terms and conditions of sale shall be in writing and signed by both parties.

1.4 Failure to append any required attachments or documentation shall result in the rejection of the bid. Failure to append any required attachments or documentation shall result in the rejection of the bid. Failure to append any required attachments or documentation shall result in the rejection of the bid.

5. INSPECTION AND TESTS - All goods shipped to the recipient and/or |TEXAS A&M| in the event that no product is returned by the buyer, or if the product is not in the condition as described in the specifications, the buyer shall be responsible for all costs related to the testing. The testing shall be performed by a mutually agreed-upon third party unless otherwise specified.

5.1 Payment - The invoice shall be paid in full upon delivery of the goods to the buyer, or if the product is not in the condition as described in the specifications, the buyer shall be responsible for all costs related to the testing. The testing shall be performed by a mutually agreed-upon third party unless otherwise specified.

6. PATENTS OR COPYRIGHTS - The supplier agrees to indemnify TEXAS A&M from any claims resulting from the infringement of any patents or copyrights.

6.1 SUPPLY AND MANUFACTURE - The supplier shall supply and manufacture all materials and equipment in accordance with the specifications and drawings, if any, provided by the buyer.

6.2 SUBCONTRACTOR AGREEMENTS - The supplier shall enter into subcontractor agreements with all subcontractors used in the performance of the contract.

6.3 The supplier shall provide the buyer with a copy of all subcontractor agreements.

6.4 The supplier shall ensure that all subcontractors comply with all applicable local, state, and federal laws and regulations.

10. BIDDER CERTIFICATIONS - The bidder certifies that it is in compliance with sections 106-36.101-.105 of the Code of Texas and any other relevant laws.

11. NOTE TO BIDDER - Any terms and conditions stated in this document are not enforceable if they specifically relate to the terms and conditions of this bid.

12. TEXAS FAMILY CODE SECTION 251.006

15. Name of Executive

16. Date of Separation from Former Agency

17. Position of Bidders

18. Date of Employment with Bidders

19. Signature of employee with document (based on) or Date of Signature for a person with no employee

20. TEXAS A&M USER MANUAL – Basic Concepts (cont’d)
Section II
Create and Maintain Bid Documents
Create Bid Documents

There are three ways to create new bid documents:

1. **Create the document**
   - 410 Bid Document Header.
   - 411 Bid Document Ship To/Invoice To addresses and text.
   - 414 Bid Document Line Items.
   - 416 Bid Document Close

2. **Copy from an existing bid document**
   - 417 Copy/Transfer Bid Line Item

3. **Transfer from a requisition**
   - 257 Copy/Transfer Requisition Line Item

Additional screens used for creating and maintaining bid documents include:

- 412 Bid Document Header Text Continued.
- 413 Bid Sole Source
- 415 Bid Document Item Description Continued.
- 417 Copy/Transfer Bid Document
- 418 Bid Document Flag Maintenance
- 419 Bid Document Note Text
- 422 Specific List Create
- 216 Bid On-Demand Print
- 308 Printer Maintenance

**Required Fields**

Information required to enter a bid document will need to be obtained in order to complete the transaction. This information consists of the following:

- The **department** originating this requisition as well as any additional departments that may be splitting this order.

- **Category** defines certain characteristics of the requisition for accounting and receiving. Examples of several categories include:
  - **RO** Regular Order
  - **BU** Blanket Unencumbered
    A requisition to instruct Purchasing to establish a vendor agreement for Quantity Discounts (MQ) or discount off list price (MD). Since funds are not encumbered, separate requisitions (category BO) will have to be issued to purchase on the Master Order.
Create Bid Documents (cont’d)

BO  Blanket Order references a Master Order
A blanket order/requisition issued to buy items on an existing Master Order (MD or MQ) that would have originally been set up on a requisition sent over as category BU.

BE  Blanket Order Encumbered
Blanket encumbered requisition issued for estimated quantities with funds encumbered. You can order off this Blanket Order the entire term of the contract without issuing another requisition.

xx  Any purchase order category that has been set up specifically for your operation.

- **User reference** that is a unique identifier assigned by your department for tracking this purchase requisition.

- **Type of Funds** which indicates the highest restricted fund used for purchases (i.e., State/local) and **Type of Order** which classifies the order based on Type of Funds.

**Other Information**

You will also need to ask yourself the following questions before beginning your bid document.

- Will the items being requested be used for research?
- Is the merchandise requested a sole source item?
- Is this an emergency purchase?
Create/Modify Bid Document Headers

The first step to creating a bid document involves specifying header information pertaining to the entire order, regardless of individual line item information. You may use Screen 410 to enter this general information.

Header information includes the document category, the originating and, when necessary, supporting departments, people to contact, and suggested vendors. Typically, bid headers are created either as the result of a transfer from a requisition or it may be directly initiated here on Screen 410.

**Screen 410 - Bid Header Create/Modify**

<table>
<thead>
<tr>
<th>Field</th>
<th>Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Doc. Year</td>
<td>2013</td>
</tr>
<tr>
<td>Total Amount</td>
<td>40802.13</td>
</tr>
<tr>
<td>Document</td>
<td>07/31/2012</td>
</tr>
<tr>
<td>Cat.: BU User Ref.</td>
<td>270590-0000</td>
</tr>
<tr>
<td>St Req.</td>
<td></td>
</tr>
<tr>
<td>Contact Person</td>
<td>ANN ANDREWS</td>
</tr>
<tr>
<td>Ph.</td>
<td>979-845-7777</td>
</tr>
<tr>
<td>Buyer</td>
<td>CKA ASH, ANGELA</td>
</tr>
<tr>
<td>SRS:</td>
<td></td>
</tr>
<tr>
<td>Ph:</td>
<td>979-845-3333</td>
</tr>
<tr>
<td>Research (Y/N)</td>
<td>Y</td>
</tr>
<tr>
<td>Type Funds</td>
<td>L</td>
</tr>
<tr>
<td>Type Order</td>
<td>HIED</td>
</tr>
<tr>
<td>Start</td>
<td>09/01/2012</td>
</tr>
<tr>
<td>End</td>
<td>08/31/2013</td>
</tr>
<tr>
<td>Doc Summary</td>
<td>ANIMAL FEED &amp; BEDDING</td>
</tr>
<tr>
<td>Bid List</td>
<td></td>
</tr>
<tr>
<td>Sole Source (Y/N)</td>
<td>Y</td>
</tr>
<tr>
<td>Emergency (Y/N)</td>
<td>N</td>
</tr>
<tr>
<td>Catalogue Order (Y/N)</td>
<td>N</td>
</tr>
<tr>
<td>Addr:</td>
<td></td>
</tr>
<tr>
<td>PH:</td>
<td></td>
</tr>
<tr>
<td>FAX:</td>
<td></td>
</tr>
<tr>
<td>Enter-PF1-PF2-PF3-PF4-PF5-PF6-PF7-PF8-PF9-PF10-PF11-PF12-</td>
<td></td>
</tr>
<tr>
<td>Hmenu Help</td>
<td></td>
</tr>
<tr>
<td>EHelp</td>
<td></td>
</tr>
<tr>
<td>Next</td>
<td></td>
</tr>
<tr>
<td>SResn EResn Notes AdVen AdDpt</td>
<td></td>
</tr>
</tbody>
</table>

**Basic Steps**

**Create a New Bid Document**
- Type a document prefix followed by a zero (0) and press <ENTER>.
- Enter the category, user reference number, type of funds, type of order, and document summary.
- Indicate whether the requisition is for research, an emergency purchase, or a sole source purchase.
- Type additional information in the available fields, as desired, and press <ENTER> to record the bid document information.
- If all information has been successfully entered, the system assigned requisition number will be displayed on the Action Line.
Modify an Existing Bid Document

- Type a bid document number in the Doc field and press <ENTER>.
- Type/modify data in the available fields, as desired
- Press <ENTER> to record the information on the bid document header.

Bid Document Creation Process

Automatic Bid Document Creation

FAMIS will automatically assign the seven-character bid document number. This is accomplished by entering the desired document prefix followed by a zero (0) in the Doc field. Generally, bid documents use a prefix of “B.”

Purchasing prefix values are set by FAMIS Services using Screen 854, but you may view them using Screen 855 (see below). The assigned document number will be displayed on the Action Line after all bid header information has been successfully entered.

Screen 855 - Type/Prefix Display

<table>
<thead>
<tr>
<th>Type</th>
<th>Fy</th>
<th>Prfx</th>
<th>Next Doc.</th>
<th>Last Number</th>
<th>Records</th>
<th>Class</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASSET TRANSFER</td>
<td>2014</td>
<td>N</td>
<td>400923</td>
<td>401422</td>
<td>500</td>
<td>TRNS DEPT PROPE</td>
<td></td>
</tr>
<tr>
<td>BID</td>
<td>2014</td>
<td>B</td>
<td>400055</td>
<td>400555</td>
<td>500</td>
<td>BIDS</td>
<td></td>
</tr>
<tr>
<td>BID</td>
<td>2014</td>
<td>C</td>
<td>400001</td>
<td>400501</td>
<td>500</td>
<td>CATALOGUE ORDER</td>
<td></td>
</tr>
<tr>
<td>DEPT BUDGET</td>
<td>2014</td>
<td>U</td>
<td>405509</td>
<td>405708</td>
<td>200</td>
<td>DEPT BUDGET REQ</td>
<td></td>
</tr>
<tr>
<td>DEPT CORRECT</td>
<td>2014</td>
<td>J</td>
<td>406697</td>
<td>407196</td>
<td>500</td>
<td>DEPT CORRECT RE</td>
<td></td>
</tr>
<tr>
<td>EXEMPT PURCH</td>
<td>2014</td>
<td>E</td>
<td>411860</td>
<td>412357</td>
<td>500</td>
<td>EXEMPT PURCHASE</td>
<td></td>
</tr>
<tr>
<td>INVOICE PROBLEM</td>
<td>2014</td>
<td>I</td>
<td>400040</td>
<td>400339</td>
<td>300</td>
<td>INVOICE PROB (P</td>
<td></td>
</tr>
<tr>
<td>LIMITED PURCH</td>
<td>2014</td>
<td>A</td>
<td>400001</td>
<td>400501</td>
<td>500</td>
<td>LIMITED PURCHASES</td>
<td></td>
</tr>
<tr>
<td>LIMITED PURCH</td>
<td>2014</td>
<td>L</td>
<td>401633</td>
<td>403633</td>
<td>2000</td>
<td>LIMITED PURCHAS</td>
<td></td>
</tr>
<tr>
<td>LIMITED PURCH</td>
<td>2014</td>
<td>Z</td>
<td>400001</td>
<td>401001</td>
<td>1000</td>
<td>LIMITED PURCHAS</td>
<td></td>
</tr>
<tr>
<td>MASTER ORDER</td>
<td>2014</td>
<td>M</td>
<td>400100</td>
<td>401010</td>
<td>100</td>
<td>MASTER ORDERS</td>
<td></td>
</tr>
<tr>
<td>PURCHASE ORDER</td>
<td>2014</td>
<td>D</td>
<td>400001</td>
<td>400101</td>
<td>100</td>
<td>PHYS PLANT ORD</td>
<td></td>
</tr>
</tbody>
</table>

Enter--PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
Hmenu Help  ENHelp
Screen 410 – Bid Header Create/Modify (cont’d)

After typing the prefix followed by a zero (0), press <ENTER> to display a pop-up window requesting departments and sub-departments. Enter all Department/Sub-Departments that will have accounts on this document. **At least one department is required.** Press **PF4** to Exit and return to **Screen 410**.

![Enter all Campus Codes and Departments/SubDepartments that will have accounts on this document](image)

**Document Categories**
Categories (Cat.:) are used to define certain characteristics of the bid document for accounting and receiving. Entering a question mark (?) in the **Cat** (document category) field and pressing <ENTER> will access a pop-up window with a complete list of document categories. Type an “X” next to the desired category and press <ENTER> to select the category and return to **Screen 410**. However, you may press **PF4** to return to **Screen 410** without selecting a document category. Some of the categories are explained below:

- **RO** Regular Order
- **BU** Blanket Unencumbered
  This category is used to instruct Purchasing to establish a vendor agreement for Quantity Discounts (MQ) or discount off list price (MD). Since funds are not encumbered, separate requisitions (category BO) will have to be issued to purchase on the Master Order.
- **BO** Blanket Order references a Master Order
  A blanket order issued to buy items on an existing Master Order (MD or MQ) that would have originally been set up on a document sent over as category BU.
- **BE** Blanket Order Encumbered
  A blanket encumbered document is issued for estimated quantities with funds encumbered. You can order off this Blanket Order the entire term of the contract without issuing another document.
- **xx** Any purchase order category that has been set up specifically for your operation.

**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.
Screen 410 – Bid Header Create/Modify (cont’d)

Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ?, or *)

Action Line
◆ Doc: 7 digits
Identify the document to create or modify.

Screen Information

Doc. Year: 4 digits
Indicates the fiscal year of the document. The field defaults to the current system fiscal year.

Total Amount: 8 digits
Indicates the total amount of the document.

◆ Document: 8 digits
Indicate the date the bid document is created. Default is current system date.

◆ Cat: Help 2 characters
Indicate the category that defines the accounting and receiving characteristics of the document.

◆ User Ref: 13 digits
Indicate the subsidiary ledger (SL) account number to be used for the order followed by the departmental identification number.

St Req: 10 digits
Displays the State requisition number assigned by the State to reference the document.

Required: 8 digits
Include date the requested order is required.

Contact Person: 20 characters
Enter the name of the person to contact regarding the bid document.

Ph: 10 digits
Type the area code and phone number for the bid document’s contact person.

Start: 8 digits
Type the start date (usually the first day of the fiscal year) for a Maintenance Agreement or Blanket Order.

Buyer: Help 3 characters
Enter the initials of the buyer for the document.

SRS: 1 character
Enter “Y” to identify the buyer as an SRS buyer.

Ph: 10 digits
Type the buyer’s area code and phone number.
Screen 410 – Bid Header Create/Modify (cont’d)

End: 8 digits
Type the end date for a Maintenance Agreement or Blanket Order.

♦ Research (Y/N): 1 character
Type “Y” to indicate the purchase items are intended for research purposes.

♦ Type Funds: Help 1 character
Indicate the type of funds to be used for the purchase of the requested item.

♦ Type Order: Help 4 characters
Identify the type of order to be placed for the requested items.
If the Type Fund: (above) was selected from the pop-up window, this field will be filled in automatically.

Change: 8 digits
Displays the date the last change was made.

No.: 3 digits
Displays the number of changes processed.

Print Doc: 1 character
Type “Y” if the document is to be printed.

Opening: 8 digits
Enter the date the bids will be opened.

Time: 6 digits/characters
Indicate the time the bids will be opened.

♦ Dept: Help 5 characters
Type the department of the primary account responsible for the bid.

♦ SubDept: Help 5 characters
Identify the sub-department of the primary account responsible for the bid document.

♦ Doc Summary: 50 characters
Enter a brief summary of the bid document as a whole that will be displayed on inquiry screens.

Bid List: 20 characters
Identify the specific bid list associated with the bid document.

♦ Sole Source (Y/N): 1 character
Type “Y” if merchandise is a sole source item (i.e.: if only one vendor may fulfill the order).

♦ Emergency (Y/N): 1 character
Enter “Y” if this is an emergency purchase.
**Screen 410 – Bid Header Create/Modify (cont’d)**

- **Catalogue**
  - Order (Y/N): Type “Y” to indicate a catalogue order.

**Suggested Vendors**

This is the department’s opportunity to suggest vendors for the items to be purchased. However, this list of vendors is for information only - they will not be printed on the bid list by specifying them here.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vn ID</td>
<td>11 digits Enter the FAMIS Vendor Identification Number.</td>
</tr>
<tr>
<td>FEI:</td>
<td>9 digits Displays the vendor’s Federal Employer Identification number.</td>
</tr>
<tr>
<td>Addr:</td>
<td>30 digits/characters, 3 lines Displays the vendor’s address.</td>
</tr>
<tr>
<td>PH:</td>
<td>10 digits Shows the vendor’s phone number.</td>
</tr>
<tr>
<td>FAX:</td>
<td>10 digits Displays the fax number for the vendor.</td>
</tr>
</tbody>
</table>

**Additional Functions**

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

- **PF5**
  - Next Screen
  - **Next** Advances to the next screen - **Screen 411**.

- **PF7**
  - Sole Source Reason
  - **SResn** Displays reason sole source flag was set to “Y.”

- **PF8**
  - Emergency Reason
  - **EResn** Shows reason emergency flag was set to “Y.”

- **PF9**
  - Notes
  - **Notes** Enter notes about the requisition. These are on-line notes for document -- they will not be printed.

- **PF10**
  - Additional Suggested Vendors
  - **AdVen** Allows four additional suggested vendor sources.

- **PF11**
  - Additional Departments
  - **AdDpt** Addition of 10 extra departments/sub-departments that have approval and accounts on requisition.
Enter Bid Document Shipping and Text

Before submitting a bid document, you must first identify where information and products are to be shipped. For example, you must specify 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 be entered before the bid may be processed. You may enter all of this information using Screen 411.

Screen 411 - Bid Shipping and Text

Basic Steps

- Type a bid document number in the Doc field.
- Press <ENTER> to display existing document address and text information.
- Add or modify data in the available fields, as desired and press <ENTER>.

Bid Text Entry Process

Text Codes

Text codes specify special attributes of the bid document as a whole. Entering a question mark (?) in the Text codes field and pressing <ENTER> will access a pop-up window with a complete list of text codes. Type an “X” next to as many as 20 text codes to be applied to the bid document. Press PF4 to return to Screen 411 where the text codes selected will be displayed. You may press PF5 while in the pop-up to display an extended description of the text code, if necessary.
Screen 411 – Bid Document Shipping and Text (cont’d)

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Drop</th>
</tr>
</thead>
<tbody>
<tr>
<td>001</td>
<td>DELIVERY MAY BE A FACTOR IN THE AWARD.</td>
<td>N</td>
</tr>
<tr>
<td>002</td>
<td>IF QUOTING OTHER THAN SPECIFIED, BIDDERS</td>
<td>N</td>
</tr>
<tr>
<td>003</td>
<td>BIDDERS MUST GIVE ESTIMATED DELIVERY</td>
<td>N</td>
</tr>
<tr>
<td>004</td>
<td>BULK PACKAGING AND SINGLE SHIPMENT ARE</td>
<td>N</td>
</tr>
<tr>
<td>005</td>
<td>VENDOR MAY BE REQUESTED TO SUBMIT A</td>
<td>N</td>
</tr>
<tr>
<td>006</td>
<td>ONCE THE ORDER IS PLACED, SUBSTITUTIONS</td>
<td>N</td>
</tr>
<tr>
<td>007</td>
<td>TEXAS A&amp;M UNIVERSITY RESERVES THE RIGHT</td>
<td></td>
</tr>
<tr>
<td>008</td>
<td>LENGTH OF DELIVERY TIME MAY BE A FACTOR</td>
<td>N</td>
</tr>
<tr>
<td>009</td>
<td>ATTENTION: DO NOT USE THIS TEXT CODE, UNABLE</td>
<td></td>
</tr>
<tr>
<td>010</td>
<td>NO SUBSTITUTION OF MANUFACTURER WILL BE</td>
<td>N</td>
</tr>
<tr>
<td>011</td>
<td>PRESENT CONTRACT WILL BE IN EFFECT</td>
<td>N</td>
</tr>
<tr>
<td>012</td>
<td>UNACCEPTABLE PERFORMANCE BY VENDOR MAY</td>
<td></td>
</tr>
</tbody>
</table>

Select up to 18 Text Codes or Press <PF4> to Quit
Press <PF5> for extended description.

Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ?, or *)

**Action Line**

◆ **Doc:** 7 digits
Type the document number of a bid to add/modify the shipping information.

**Screen Information**

**Ship To**

◆ **Address Nbr:** 3 digits
Enter the delivery address code for the items purchased.

◆ **Name:** 30 characters
Type the name of the person or company the items will be delivered to.

◆ **Addr:** 30 digits/characters per line
Indicate the delivery address for the items purchased. Filled in automatically if an Address Nbr: is specified.

◆ **City:** 20 characters
Include the city to which items purchased will be delivered. Filled in automatically if an Address Nbr: is specified.

◆ **State:** 2 characters
Identify the state to which items purchased will be delivered. Filled in automatically if an Address Nbr: is specified.

◆ **Zip:** 9 digits
Indicate the zip code to which items purchased will be delivered. Filled in automatically if an Address Nbr: is specified.

**Country:** 3 characters
Include the country code for the delivery address. Filled in automatically if an Address Nbr: is specified.
Screen 411 – Bid Document Shipping and Text (cont’d)

**Phone:**
10 digits
Indicate the phone number for the delivery address. **Filled in automatically if an Address Nbr: is specified.**

**FAX:**
10 digits
Identify the FAX number for the delivery address. **Filled in automatically if an Address Nbr: is specified.**

**Invoice To**

**Address Nbr:**
3 digits
Enter the billing address code for the items purchased.

**Name:**
30 characters
Type the name of the person or company the invoice will be delivered to.

**Addr:**
30 digits/characters per line
Indicate the billing address for the items purchased. **Filled in automatically if an Address Nbr: is specified.**

**City:**
20 characters
Include the city of the billing address for which items purchased will be billed. **Filled in automatically if an Address Nbr: is specified.**

**State:**
2 characters
Indicate the state of the billing address for which items purchased will be billed. **Filled in automatically if an Address Nbr: is specified.**

**Zip:**
9 digits
Identify the zip code of the billing address for which items purchased will be billed. **Filled in automatically if an Address Nbr: is specified.**

**Country:**
3 characters
Indicate the country code for the billing address. **Filled in automatically if an Address Nbr: is specified.**

**Phone:**
10 digits
Include the phone number for the billing address. **Filled in automatically if an Address Nbr: is specified.**

**FAX:**
10 digits
Indicate the FAX number for the billing address. **Filled in automatically if an Address Nbr: is specified.**

**Text codes:**
3 characters
Identify any text codes for special vendor instructions to be added to the bid document.

**Additional Text Lines:**
180 characters
Include any additional special instructions to be added to purchase requisition that do not have an assigned text code in FAMIS.
Screen 411 – Bid Document Shipping and Text (cont’d)

More text lines: 1 character
Type “Y” to add additional lines of text on Screen 412 (99 lines available).

Additional Functions

PF KEYS

PF5 Next Screen
Advances to the next screen - Screen 414 (Bid Line Item Create/Modify).

PF9 Notes
Used to enter free-form notes about the bid document.

These are on-line reference notes regarding the document. They will not be printed.
Create/Modify Bid Document Line Items

Each individual line item for the bid document is entered separately using Screen 414. You may input up to 900 separate lines for one bid document. For each line item you must enter the quantity, unit of measure, unit price, and description in order for it to be processed by the system.

**Screen 414 - Bid Line Item Create/Modify**

<table>
<thead>
<tr>
<th>414 Bid Line Item Create/Modify</th>
<th>11/18/10 14:42</th>
</tr>
</thead>
<tbody>
<tr>
<td>Screen: ___ Doc: B100183 Item: __1.0</td>
<td>FY 2011 CC 02</td>
</tr>
</tbody>
</table>

Estimated

<table>
<thead>
<tr>
<th>Quantity</th>
<th>UOM</th>
<th>Unit Price</th>
<th>Extended Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>______1.00</td>
<td>LOT_</td>
<td>______19000.0000</td>
<td>19000.00</td>
</tr>
</tbody>
</table>

Commodity: 910-01_________ Proc Cd: M
Part Nbr: _______________ Desc: PROVIDE LABOR AND MATERIALS TO RENOVATE ROOMS 406 AND 408 ENGINEERING/PHYSICS BUILDING #392.

REFERENCE

APPENDIX A - SUMMARY OF WORK
APPENDIX B - INSURANCE REQUIREMENTS
APPENDIX C - GENERAL TERMS & CONDITIONS

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
Hmenu Help EHelp Next Notes

**Basic Steps**

- Type a document and line item number in the fields provided and press <ENTER> to display existing line item information.
- Type a quantity, unit of measure, unit price, and line item description.
- Type additional information in the available fields, as desired, and press <ENTER> to record the line item information.

**Bid Line Item Process**

**Line Item Entry**

Documents may have up to 900.0 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.

**Field Descriptions** (*◆*= Required; **Help**= Field Help Available Using PF2, ?, or *)

**Action Line**

◆ Doc: 7 digits
Enter the bid document number for the line item.
Screen 414 – Bid Line Item Create/Modify (cont’d)

- **Item:** 4 digits
  Type the item number to be created or modified.

**Screen Information**
- **Quantity:** 10 digits
  Indicate the purchase quantity of the line item.
- **UOM:** Help 4 characters
  Identify the unit of measure for the line item.
- **Estimated Unit Price:** 16 digits
  Shows the estimated dollar amount to be paid for the item per its unit of measure.
  **Extended Price:** 16 digits
  Shows total item amount calculated by system.
- **Commodity:** Help 15 digits
  Enter the commodity code.
- **Proc Cd:** Help 1 character
  Enter processing code if item needs special processing.
- **Part Nbr:** 15 digits
  Type a pre-assigned part number of the item.
- **Desc:** 10 lines (45 characters each)
  Type a description of the specified line item.
- **More Desc:** 1 character
  Type “Y” if more description lines are needed.
- **More Items:** 1 character
  Enter “Y” if more line items are to be processed.
- **Print Line:** 1 character
  Type “Y” if line item information should be printed.

**Additional Functions**

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

- **PF5**
  **Next Screen**
  Advances to next screen - Screen 416.
- **PF9**
  **Notes**
  Enter notes about the line item.
  *These are online notes and will not be printed.*
Close Bid Document

You should close the bid document after all required information has been successfully entered to prevent further changes from being made. Closing a bid document will mark the document as ready for printing.

If bid lists are being used, your bid document may not be closed until the bid list process has been successfully completed.

It is possible to close and re-open a document in order to make changes as long as the bid document has not entered the routing and approval system of FAMIS.

Screen 416 - Bid Document Close

<table>
<thead>
<tr>
<th>416 Bid Document Close</th>
<th>11/18/10 14:42</th>
</tr>
</thead>
<tbody>
<tr>
<td>Screen: ___ Doc: B100183</td>
<td>FY 2011 CC 02</td>
</tr>
</tbody>
</table>

<< Dates >>

Document: 11/15/2010  Cat: RO  User Ref: 2xxxxxxxx780  St Req: 
Start :  Contact Person: BEA BLOOMBERG  Ph: 979-845-5555
End :  Buyer: CCO  OSHKOSH, OMAR  Ph: 979-845-1111
Required:  Research (Y/N): N  Type Funds: L  Type Order: HIED
Change :  No.  Last Print Date: 11/16/2010
Sole Source: N  Emergency: N

Doc Summary: PROVIDE LABOR & MATERIAL TO RENOVATE ROOMS

Total Amount:  19,000.00  Untransferred Total:  19,000.00

Closed

Close Document? N

Basic Steps

- Type a bid document number in the Doc field.
- Press <ENTER> to display existing document information.
- Set the Close Document: flag to “Y” and press <ENTER>.
- If all required information has been properly processed, the message “Document closed successfully” will appear on the message line.

Change Your Bid Document

Sometimes you may need to make changes to one of your bid documents. However, changes may only be processed before it enters the routing and approval system. Changes may be made to the document by reopening it. To reopen a document, advance to Screen 418 and set the Reopen Document flag to “Y.”

Route the Document

A closed document may be submitted to the routing and approval section of FAMIS by pressing PF7.
Rejected Documents
If errors are detected to your document while in routing, it will be rejected and returned to your in-box (Screen 910) for correction. When this happens, you should:

1. Select the document by typing an “X” next to it in your in-box and then press **PF8 (Sel)**.

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. Re-open the document on **Screen 418** by setting the Reopen Document flag to “Y” and pressing <ENTER>.

4. Make the necessary changes using **Screen 410** through **Screen 419**.

5. Finally, advance to **Screen 416** to close and re-route the document.

Field Descriptions (**◆** = Required; **Help** = Field Help Available Using PF2, ?, or *)

**Action Line**

**◆ Doc:**
- 7 digits
- Enter the bid document number to close.

**Screen Information**

**Document:**
- 8 digits
- Indicates the date the document was created by the system.

**Cat:**
- 2 characters
- Defines the category of the bid document.

**User Ref:**
- 14 digits
- Identifies the subsidiary ledger (SL) account number to be used for the order followed by the user-assigned reference number.

**St Req:**
- 10 digits
- Indicates the State requisition number assigned by the State to reference the document.

**Start:**
- 8 digits
- Indicates the start date (usually the first day of the fiscal year) for a Maintenance Agreement or Blanket Order.

**Contact Person:**
- 20 characters
- Displays the name of the person to contact regarding the document.

**Ph:**
- 10 digits
- Indicates the area code and phone number for the document’s contact person.
<table>
<thead>
<tr>
<th>Field</th>
<th>Format</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>End</strong></td>
<td>8 digits</td>
<td>Indicates the end date for a Maintenance Agreement or Blanket Order.</td>
</tr>
<tr>
<td><strong>Buyer</strong></td>
<td>3 characters</td>
<td>Displays the initials of the buyer for the purchase.</td>
</tr>
<tr>
<td><strong>Ph</strong></td>
<td>10 digits</td>
<td>Indicates the area code and phone number of the buyer for the bid document.</td>
</tr>
<tr>
<td><strong>Required</strong></td>
<td>8 digits</td>
<td>Displays the date by which the requested order is required.</td>
</tr>
<tr>
<td><strong>Research (Y/N)</strong></td>
<td>1 character</td>
<td>“Y” indicates the purchase items are intended for research purposes.</td>
</tr>
<tr>
<td><strong>Type Funds</strong></td>
<td>1 character</td>
<td>Identifies the type of bidder: State (S) or local (L) to be used for the purchase of the requested item(s).</td>
</tr>
<tr>
<td><strong>Type Order</strong></td>
<td>4 characters</td>
<td>Indicates the type of order to be placed for the requested items.</td>
</tr>
<tr>
<td><strong>Change</strong></td>
<td>8 digits</td>
<td>Identifies the type of order to be placed for the requested items.</td>
</tr>
<tr>
<td><strong>No.:</strong></td>
<td>3 digits</td>
<td>Shows the number of changes that have been processed by the system.</td>
</tr>
<tr>
<td><strong>Last Print Date</strong></td>
<td>8 digits</td>
<td>Indicates the date the document was last printed.</td>
</tr>
<tr>
<td><strong>Sole Source</strong></td>
<td>1 character</td>
<td>“Y” indicates the merchandise requested is a sole source item.</td>
</tr>
<tr>
<td><strong>Emergency</strong></td>
<td>1 character</td>
<td>“Y” identifies this is an emergency purchase.</td>
</tr>
<tr>
<td><strong>Doc Summary</strong></td>
<td>50 characters</td>
<td>Displays a brief summary of the document that will be displayed on inquiry screens.</td>
</tr>
<tr>
<td><strong>Total Amount</strong></td>
<td>17 digits</td>
<td>Identifies the total dollar amount required for purchase of the requested items.</td>
</tr>
<tr>
<td><strong>Untransferred Total</strong></td>
<td>17 digits</td>
<td>Shows the total dollar amount that has not been transferred to a purchase order.</td>
</tr>
</tbody>
</table>

**Close Document?:** 1 character
Type “Y” to close the selected document.
Screen 416 – Bid Document Close (cont’d)

**Budget Balance**
1 character
Enter “Y” if the purchase will be allowed to exceed the available budget.

**Override:**
6 characters
Displays your FAMIS session ID code.

**Date:**
6 digits
Displays the last closing date of the document.

**Additional Functions**

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

**PF5 Next Screen**
Advances to the next screen - Screen 410 (Bid Document Header/Create Modify).

**PF6 Item**
Displays the document inquiry pop-up window to view all items for the document.

**PF7 Route Document**
Sends a closed document through the routing and approval process.

**PF12 Warnings**
Displays any FAMIS warnings.
Add Additional Bid Document Header Text

Additional instructions pertaining to the bid that do not have an assigned text code in FAMIS may be entered using Screen 412. Ninety-nine lines of additional text may be entered using this screen. Text is entered without a wrap around feature, so a word may be split between two lines. Tabbing will take you to the next available text line.

<table>
<thead>
<tr>
<th>Line</th>
<th>Additional Text</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>REF 270160-16823, W/O 100831681-005, R100960_</td>
</tr>
<tr>
<td>2</td>
<td>B100179, UTILITY, SME________________________</td>
</tr>
<tr>
<td>3</td>
<td>_____________________________________________</td>
</tr>
<tr>
<td>4</td>
<td>TAMU CONTACTS:_______________________________</td>
</tr>
<tr>
<td>5</td>
<td>_____________________________________________</td>
</tr>
<tr>
<td>6</td>
<td>BID QUESTIONS:  PAM PAULIE__________________</td>
</tr>
<tr>
<td>7</td>
<td>979-458-2222________________</td>
</tr>
<tr>
<td>8</td>
<td>P-PAULIE@ANY.EDU____________</td>
</tr>
<tr>
<td>9</td>
<td>_____________________________________________</td>
</tr>
<tr>
<td>10</td>
<td>CHANGES TO THE BID MUST BE AUTHORIZED BY____</td>
</tr>
<tr>
<td>11</td>
<td>PAM PAULIE, DEPARTMENT OF PROCUREMENT________</td>
</tr>
<tr>
<td>12</td>
<td>_____________________________________________</td>
</tr>
<tr>
<td>13</td>
<td>BIDS MUST BE SIGNED AND RETURNED ON OUR BID__</td>
</tr>
<tr>
<td>14</td>
<td>FORMS. FAILURE TO DO SO SHALL RESULT IN YOUR_</td>
</tr>
<tr>
<td>15</td>
<td>Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---</td>
</tr>
</tbody>
</table>

Basic Steps

- Type a bid document number in the Doc field, and press <ENTER> to display existing document text.
- Add or modify text in the available fields, as desired, and press <ENTER> to record the information.

Requisition Text Entry Process

Page through Text
The F/B/E field is used to scroll through all of the lines of text added on Screen 412. Entering an “F” will scroll one page forward. Entering a “B” will scroll one page backwards. Entering an “E” will “end” the editing session and take you to the next required requisition screen.

Field Descriptions

Action Line

- **Doc:** 7 digits
  - Identify the bid document number to which you would like to add text.
Screen 412 – Bid Document Additional Header Text (cont’d)

**Screen Information**

**Position at line:** 3 digits
Indicate the line number of the text to be positioned at the top of the screen.

**Page (F/B/E):** 1 character
Indicate 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.

**Line:** 1 character
Indicates the line number the text is typed on.

**Additional Text:** 45 characters per line
Type additional text in this field.

**Additional Functions**

**PF KEYS**
See the Appendix for an explanation of the standard PF keys.
Add Bid Sole Source Information

Screen 413 is used to enter detailed information if the bid document is to be sent to a specific vendor. The information is required to justify why the items to be purchased need to be obtained solely from a designated source.

**Screen 413 - Bid Sole Source**

<table>
<thead>
<tr>
<th>413 Bid Sole Source</th>
<th>11/18/10 14:50</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY 2011 CC 02</td>
<td></td>
</tr>
<tr>
<td>Screen: ___ Doc: B100175</td>
<td></td>
</tr>
</tbody>
</table>

1) Is this item required for use in: Research? _ Classroom? _ Lab? _ Other? WASTEWATER __________
2) List proprietary functions or features. List qualities that are essential to accomplish your work.
   THE REQUESTED PARTS ARE FOR REPAIR OF A IDI CLIMBER SCREEN. THIS ITEM AND ALL REPAIR PARTS ARE MANUFACTURED SPECIFICALLY FOR TAMU WASTEWATER TREATMENT PLANT AND ALL DRAWINGS ARE PROPRIETARY TO IDI AND TAMU.
3) List other companies who manufactures a similar item with similar functions. PARTS ARE NOT COMMERCIAL AVAILABLE AS THEY ARE PROPRIETARY. IDI FIELD SERVICE COMPANY IS THE FABRICATOR AND CAN EASILY RECOGNIZE _______
4) Why won't these competing products be satisfactory?
   NONE AVAILABLE DUE TO PROPRIETARY NATURE OF THE EQUIPMENT. __________
5) Will installation be required? Y (Y/N)________
6) Will this item be used with existing equipment? Y (Y/N)________

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
Hmenu Help EHelp [Next] Notes ExEq

**Basic Steps**
- Type a bid document number in the **Doc** field.
- Include the reasons for the sole source bid.
- Press <ENTER> to record the information on the bid document.

**Bid Sole Source Process**

At times it is necessary to use a specific vendor when purchasing specialized products. For example, if a required part for a machine is only manufactured by a certain company, or if a manufacturer is the only authorized distributor or parts and service for the item needed. In the bidding process, information is needed to justify why bids should not be sent to other vendors, and to document why only specific products or services are required.

**To Remove Information**
Set the sole source flag to “N” on the document header screen 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.
Screen 413 – Adding Sole Source Information (cont’d)

Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ?, or *)

Action Line
◆ Doc: 7 digits
Enter a bid document number.

Screen Information
1) Item Required for use in: 1 character
Type “X” and press <ENTER> to identify the requirements for use of bid item:
Research, Classroom, Lab or Other (and specify).

2) List propriety functions: 4 lines
List proprietary functions or features and what qualities are essential.

3) List other companies: 2 lines
List other companies who manufacture a similar item with similar functions.

4) Reasons not satisfactory: 3 lines
Include reasons why these competing products won’t be satisfactory.

5) Installation required?: 1 character
Type “Y” if installation will be required.

6) Used with existing equipment?: 1 character
Enter “Y” if the item will be used with existing equipment.

Additional Functions
PF KEYS See the Appendix for an explanation of the standard PF keys.

PF5 Next Advances to the next screen - Screen 414.

PF9 Notes Enter notes about the bid document.

PF10 ExEq Include repair/replacement information for existing equipment.
Modify Bid Document Line Item Description

Line item descriptions that exceed the space provided on Screen 414 may be entered here on Screen 415. Ninety nine lines of additional text may be input for each line item using this screen. However, text is entered without a wrap around feature, so a word may be split between two lines if you are not careful.

Text entered on this screen will appear on the bid document when printed.

Screen 415 - Bid Item Description

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Suppy and install hose between hydraulic pump and testing equipment as per provided________</td>
</tr>
<tr>
<td>2</td>
<td>_____________________________________________</td>
</tr>
<tr>
<td>3</td>
<td>Includes 1.000&quot; ID &quot;Kurt Tuff&quot; hydraulic hose</td>
</tr>
<tr>
<td>4</td>
<td>2900 PSI, working pressure 11,600 PSI burst._</td>
</tr>
<tr>
<td>5</td>
<td>Vendor will supply all fittings required as__</td>
</tr>
<tr>
<td>6</td>
<td>well as shut off valves shown. Vendor will___</td>
</tr>
<tr>
<td>7</td>
<td>supply eight valves for shut off’s at the___</td>
</tr>
<tr>
<td>8</td>
<td>tees. Vendor will supply all mounting________</td>
</tr>
<tr>
<td>9</td>
<td>________________________</td>
</tr>
<tr>
<td>10</td>
<td>___________________________________________</td>
</tr>
<tr>
<td>11</td>
<td>_____________________________________________</td>
</tr>
<tr>
<td>12</td>
<td>_____________________________________________</td>
</tr>
<tr>
<td>13</td>
<td>_____________________________________________</td>
</tr>
<tr>
<td>14</td>
<td>_____________________________________________</td>
</tr>
<tr>
<td>15</td>
<td>_____________________________________________</td>
</tr>
<tr>
<td>16</td>
<td>_____________________________________________</td>
</tr>
</tbody>
</table>

Basic Steps

- Type a bid document number in the Doc field.
- Press <ENTER> to display existing line item text.
- Add or modify text in the available fields, as desired.
- Press <ENTER> to record the information on the bid document.

Requisition Line Item Process

Page through Text

The F/B/E field is used to scroll through all of the lines of text added on Screen 415. Entering an “F” will scroll one page forward. Entering a “B” will scroll one page backwards. Entering an “E” will end the editing session and take you to the next required screen.

Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ?, or *)

Action Line

◆ Doc: 7 character/digits
Identify the desired bid document number of the line item to be added or modified.
Screen 415 – Bid Document Item Description (cont’d)

- **Item:**
  - 4 digits
  - Type the item number to be added or modified.

**Screen Information**

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

- **Page (F/B/E):**
  - 1 character
  - Signify whether to scroll forward (F) or backward (B) through the lines of text, or end (E) the editing and return to the next required screen.

- **Line:**
  - 1 character
  - Indicates the line number of the text description.

- **Description:**
  - 45 characters per line
  - Type a description of the bid item.

**Additional Functions**

- **PF KEYS**
  - See the Appendix for an explanation of the standard PF keys.
Copy a Bid Doc. to Another Purchase Doc.

You may find it beneficial to copy or transfer frequently purchased items from existing bid documents to new bid documents. You may also copy or transfer items from a bid document to a purchase order, a master order, or to another bid document.

Screen 417 allows you to retrieve a bid document previously entered and copy or transfer line items to an existing or newly created bid, master order, or purchase order.

Whenever a purchase order is created or “added to” as a result of line item transfer(s) from either a requisition (via Screen 257) or a bid originating from a requisition (via Screen 417), a notification will be sent to the requisition creator’s in-box. This change has been made in an effort to better communicate the change of status from a requisition to a purchase order to the departments.

This communication comes in the form of an “FYI” in the requisition creator’s inbox. The requested action of the “FYI” will indicate “Ntfy/Trnsfr.” The routing document will contain a routing note indicating: >> Item Transfer on 03/20/07 to Doc: xxxxxxx. The specific line items used to create the purchase order are not shown in this notification, however. The user can continue to see the specifics of the transfer by viewing Screen 290 or using the PF12 “Track” key via Screen 280. Screen 280 shows the most detail.

All other existing notifications will continue to be sent.
Screen 417 – Bid Document Line Item Copy/Transfer (cont’d)

Basic Steps

**Copy/Transfer Items to a New Purchase Document**
- Type a bid document number in the **Doc** field and press <ENTER>.
- Indicate whether you would like to create a new master order, bid document, or purchase order by specifying the document class in the **New Class** field.
- Type a document prefix followed by a zero (0) in the (New) **Doc** field and a category in the **Cat** field.
- Press <ENTER> to view a list of line items available for copy/transfer.
- Indicate whether you wish to Copy or Transfer the selected line item to the new document.
- Press <ENTER> to copy/transfer the items and create the new purchase document.

**Copy/Transfer Items to an Existing Purchase Document**
- Type a bid document number in the **Doc** field and press <ENTER>.
- Indicate whether you would like to modify a master order, bid document, or purchase order by specifying the document class in the **Exist Class** field.
- Type a document prefix followed by a zero (0) in the **Doc** field and a category in the **Cat** field.
- Press <ENTER> to view a list of line items available for copy/transfer.
- Indicate whether you wish to Copy or Transfer the selected line item to the selected document.
- Press <ENTER> to copy/transfer the items and create the new or edit the existing purchase document.

Bid Copy/Transfer Process

**Automatic Document Creation**
FAMIS will automatically assign the seven character document number when creating a new purchase document. This is accomplished by entering the document prefix followed by a zero (0) in the **Doc** field. **Purchasing prefix values are set by the FAMIS Services Team using Screen 854.** These values may be viewed using Screen 855. The assigned document number will be displayed after all required information has been successfully entered.
Screen 417 – Bid Document Line Item Copy/Transfer (cont’d)

Document Categories
Categories (Cat) are used to define certain characteristics of the purchase document for accounting and receiving. Entering a question mark (?) in the Cat field and pressing <ENTER> will access a pop-up window with a complete list of valid document categories. Type an “X” next to the desired type and press <ENTER> to select a category and return to Screen 417. Press PF4 if you wish to return to Screen 417 without selecting a document category. Sample categories include:

<table>
<thead>
<tr>
<th>Value</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>BE</td>
<td>Blanket Encumbered</td>
</tr>
<tr>
<td>BO</td>
<td>Ref. Blanket Order</td>
</tr>
<tr>
<td>BU</td>
<td>Blanket Unencumbered</td>
</tr>
<tr>
<td>EP</td>
<td>Exempt Purchases</td>
</tr>
<tr>
<td>LP</td>
<td>Limited Purchase</td>
</tr>
<tr>
<td>MD</td>
<td>Master Order (DISC)</td>
</tr>
<tr>
<td>MQ</td>
<td>Master Order (QTY)</td>
</tr>
<tr>
<td>RO</td>
<td>Regular Orders</td>
</tr>
</tbody>
</table>

Vendor Search and Select
Vendor search and selection is available for all vendor ID numbers. If the vendor ID is unknown, enter an asterisk (*) in the Vndr field and press <ENTER> to access a pop-up window. This window will display a list of vendors and their ID numbers. Type an “X” to the left of the desired vendor and press <ENTER> to select the vendor and return to Screen 417. Press PF4 if you wish to return to Screen 417 without selecting a vendor.

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.

Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

Action Line
◆ Doc: 7 character/digits
Identify the bid document number to be copied or transferred.
Screen 417 – Bid Document Line Item Copy/Transfer (cont’d)

**Item:** 4 digits
Indicate the item number to copy or transfer.

**From Vndr:** 25 characters
Displays the name of vendor copying or transferring from.

**To Vndr:** 25 characters
Shows the name of vendor copying or transferring to.

**New**

- **Class:** 1 character
  Indicate the class of the new document: Bid (B), Exempt Purchase (E), Limited Purchase (L), Master Order (M), Purchase Order (P) or Requisition (R).

- **Doc:** 7 character/digits
  Type the document prefix followed by a zero, instructing FAMIS to automatically assign a new requisition number.

- **FY:** 4 digits
  Indicate fiscal year for the purchase of the items. The field defaults to the current system fiscal year if left blank.

- **Cat:** 2 characters
  Define the category of the requisition.

- **Vndr:** 11 digits
  Enter the vendor’s identification number.

- **Dt:** 8 digits
  Indicate the date the new requisition or purchase order is created.

**Exist**

- **Class:** 1 character
  Signify the class of the existing document: Bid (B), Exempt Purchase (E), Limited Purchase (L), Master Order (M), Purchase Order (P) or Requisition (R).

- **Doc:** 7 character/digits
  Type the document number to which you would like to copy/transfer items.

**Screen Information**

- **Header Screen:** 1 character
  Type “Y” if the system should take you to the header of the new document upon completion of the copy/transfer.

- **Func:** 1 character
  Identify the function to be performed.
  
  T = Transfer item
  
  C = Copy item
Screen 417 – Bid Document Line Item Copy/Transfer (cont’d)

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item:</td>
<td>5 digits&lt;br&gt;Show the line item number(s) on the document.</td>
</tr>
<tr>
<td>Desc:</td>
<td>20 characters&lt;br&gt;Displays a description of the line item.</td>
</tr>
<tr>
<td>Quantity:</td>
<td>9 digits&lt;br&gt;Identifies the purchase quantity of the specified line item.</td>
</tr>
<tr>
<td>Unit Price:</td>
<td>11 digits&lt;br&gt;Indicates the line item price per unit of measure.</td>
</tr>
<tr>
<td>UOM:</td>
<td>3 characters&lt;br&gt;Shows the unit of measure for the specified line item.</td>
</tr>
<tr>
<td>Ext. Price:</td>
<td>12 digits&lt;br&gt;Displays the total item extended price amount, as computed by the system.</td>
</tr>
<tr>
<td>Proc Cd:</td>
<td>1 character&lt;br&gt;Identifies the processing code if the line item needs special processing or if it has been transferred to another purchase document.</td>
</tr>
</tbody>
</table>

**Additional Functions**

- **PF KEYS**
  - See the Appendix for an explanation of the standard PF keys.
- **PF12**
  - **Warnings**
  - Displays any FAMIS warnings.
Cancel, Freeze, Reopen, Delete Flags

To cancel a bid document or delete items, you can use Screen 418. Note that canceling a bid document also unencumbers the funds. If you undelete items, the funds are not re-encumbered. Specific items or all items on a document may also be deleted.

Here you also have the ability to freeze/unfreeze a document. This might be used in a case where you do not want any further activity for a period of time.

To re-open a document to make changes, you change the “N” to a “Y” in the appropriate field. This allows you to make changes to the document.

Basic Steps

- Type a bid document number in the Doc field, and press <ENTER> to display current flag settings.
- Modify flags as necessary and press <ENTER> to record document flag changes.

Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

**Action Line**

◆ Doc: 7 character/digits

Identify the document number on which flags are to be set/re-set.

**Screen Information**

Cancel/Delete: 1 character

Indicate whether or not (“Y” or “N”) the document should be cancelled and removed from the system or if the document should be held (H) for deletion.
Freeze Document: 1 character
Indicate whether or not (“Y” or “N”) the document should be frozen and restricted from further activity.

Reopen Document: 1 character
Specify whether or not (“Y” or “N”) a closed document should be returned to an open status so that additions and modifications may be processed.

Delete all Items: 1 character
Indicate whether or not (“Y” or “N”) to delete and remove all items from the specified document.

Delete/Undelete Item: 5 digits
Identify the first line item number in the range of line items you wish to delete or undelete from the bid document.

Thru Item: 5 digits
Enter the last line item number in the range of line items to delete or undelete.

Additional Functions
PF KEYS
See the Appendix for an explanation of the standard PF keys.

PF7 Track
Document Tracking
View the document’s tracking history.

PF9 Accts
Accounts
Displays all responsible accounts and their portion of the total order.

PF10 Extnd
Extended Information
View the document header extended information. From within this window you can view multiple pop-ups with document information.

PF11 Items
Line Items
Shows detail information about the documents line items.

PF12 Warns
Warnings
Displays any FAMIS warnings.
Enter Notes to a Bid Document

This screen is used for entering informational notes to the bid document. It may be used to enter notes on a closed document. Ninety-nine (99) lines of notes may be entered using Screen 419.

Text is entered without a word wrapping feature. To prevent a word being split between two lines, use the TAB key to advance to the next available text line.

Screen 419 - Bid Note Text

Basic Steps
- Type a bid document number in the Doc field.
- Press <ENTER> to display existing document notes.
- Add or modify text in the available fields, as desired.
- Press <ENTER> to record the information.

Bid Document Notes Entry Process

Page through Text
The F/B/E field is used to scroll through all of the lines of text added on Screen 419. Entering an “F” will scroll one page forward. Entering a “B” will scroll one page backwards. Entering an “E” will end the editing session and take you to the next required requisition screen.

View Document Notes
When notes are attached to document line 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.
Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

Action Line
◆ Doc: 7 character/digits
Identify the bid document number to which you wish to add notes.

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

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

Line: 2 digits
Displays the description line number.

Description: 45 characters per line
Type the bid note descriptions text.

Page (F/B/E): 1 character
Indicate whether to page forward (F) or backward (B) through text lines, or end (E) the editing session.

Additional Functions
PF KEYS
See the Appendix for an explanation of the standard PF keys.

PF7 Previous Item
PItem
Toggles back to the previous line item notes.

PF8 Next Item
NItem
Scrolls forward to the next line item on the document.
Print Your Bid Document on Demand

When it is necessary for you to print or re-print your bid document(s) using the on-demand feature (at a time other than the nightly print cycle), Screen 216 can be used. This allows you to print a bid document, or a range of bid documents, on demand.

When you are re-printing a bid document, you may only specify a single document to be printed. In other words, you may not re-print a range of bid documents.

To use Screen 216 for printing bids, FAMIS Services must first set up Screen 307 and Screen 308. (Screen 307 sets the Purchasing Default Parameters such as number of copies. Screen 308 sets the default printer destination.)

If buyers choose to use different printers, then print destinations are set by the buyer on Screen 315.

Type “Y” in the Exclude Vndr ID field to mask the Vendor/Bidder ID on printed documents, so that only the last 4 numbers will be printed. The preceding numbers will be all asterisks (*). Type “N” in this field if you desire to have the full Vendor/Bidder ID printed. The Vendor/Bidder ID number will still be displayed on FAMIS screens.

You cannot print a Bid document unless it contains at least one line item with a price above zero.
Basic Steps

- Type a bid document, or range of bid documents in the fields provided and press <ENTER>.
- Indicate whether you would like to print or re-print the document(s).
- Specify the number of additional copies of the bid document you would like to have printed. (These will not be sent to a specified bidder.)
- Add or modify information in the available fields, as desired.
- Press <ENTER> to send the bid document(s) to the printer.

Print Bid Document Process

Catalogue Flag

- Any time a document is transferred or copied to a document with a class of “B,” the catalogue flag must be set to “Y” or “N.” This is done on a pop-up window at the time of the transfer or copy.

- For on-demand print, when only one document is printed, the program defaults to the bid/catalogue form based on the catalog flag on the document. Because of the limitations of on-demand print, if a range of numbers is to be printed the program will print only bids or only catalogue orders based on the catalogue flag.

- If the catalogue form is needed when printing a range, you must use the catalogue flag on this screen.

- A separate prefix is recommended for catalogue orders when using on-demand print. This will prevent the need to print a range of numbers twice. The prefix is set up by FAMIS Services using Screen 854.

- For batch printing, the catalogue orders will be separated to print on a different forms code based on the catalogue flag.

Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

Action Line
◆ Start Doc: 7 character/digits
Identify the first bid document number in the range to print.

Tech notes: to print test copy, use runlib#f05bidpr; to view output, see Screen 857
Screen 216 – Print Bid Document (cont’d)

**End Doc:**
- **7 character/digits**
  - Identify the last bid document number in the range you wish to print. **If you are only printing/re-printing a single document, this will be the same as the Start Doc.**

**Screen Information**

**Print (Y/N):**
- **1 character**
  - Type “Y” to print the bid document.

**Printer:**
- **16 characters**
  - Identify the printer to which bid documents are to be sent.
  - **This information is entered by the FAMIS staff.**

**Print Dt:**
- **8 digits**
  - Enter the print date of the bid document. This will default to the current date if not otherwise specified.

**Reprint:**
- **1 character**
  - Type “Y” to re-print bid document.

**Catalogue Only:**
- **1 character**
  - Enter “Y” if the document is a catalogue order.

**Nbr Copies:**
- **2 digits**
  - Indicate the number of copies of the bid document you would like to have printed, **in addition to those copies that will be sent to bidders.**

**Ship To:**
- **10 characters**
  - Identify the location to which copies of the bid document should be delivered.

**Bid List:**
- **1 character**
  - Type “Y” if there is a specific list of bidders associated with the bid document. **A separate copy of the bid document will be printed and sent to each bidder on the list.**

**Two Forms:**
- **1 character**
  - Enter “Y” if the document is to be printed on two different forms. **Only used by TAMU.**

**Text Codes Last:**
- **1 character**
  - Type “Y” if text codes should be printed at the end of the bid document.

**Mail Code:**
- **1 character**
  - Enter “Y” to use the mail stop code information from the department in the “ship to” address.

**FED Text Codes:**
- **7 characters**
  - Type “Y” to indicate Federal text codes (on **Screen 313**) should be printed at the end of the bid document.
Screen 216 – Print Bid Document (cont’d)

Spl Output: 10 characters
Include printer forms code for any special output.
Only used by TAMU.

Exclude Vndr ID: 1 character
Type “Y” to mask the Vendor/Bidder ID on the printed document. Only the last 4 digits of the Vendor ID number will be displayed, preceded by asterisks when this is set to “Y.” Type “N” in this field if you desire to have the full Vendor ID number printed. Vendor ID numbers will still be displayed on FAMIS screens. Type “N” to print the full Vendor/Bidder ID.
This can be set on Screen 307 as the default to mask the Vendor ID number.

Print CC: 1 character
Type “Y” to print campus code on the document.

Bid Document Information

Document Dt: 8 digits
Shows the date the document was created.

Cat: 2 characters
Displays the category of the document.

User Ref: 14 digits
Indicates the subsidiary ledger (SL) account number to be used for the order followed by the departmental user reference identification number.

Buyer: 3 characters
Displays the buyer code and buyer’s name for the document.

Dept: 5 characters
Indicates the department of the primary account responsible for the bid.

SubDept: 5 characters
Identifies the sub-department of the primary account responsible for the bid document.

Print Doc?: 1 character
Type “Y” if the specified document is to be printed.

Catalogue Order: 1 character
Enter “Y” to identify the document is a catalogue order.

Doc Summary: 50 characters
Displays a brief summary of the bid document as a whole that will be displayed on inquiry screens.

Additional Functions

PF KEYS
See the Appendix for an explanation of the standard PF keys.
Printer Maintenance

Printer Maintenance for Purchasing Document to print on-demand involves setting up general printer defaults for a particular FAMIS campus code. These values define the document form and the default printer destination for each form. The default values are entered and updated on **Screen 308**.

Note that if an individual buyer has entries on the bottom of **Screen 315**, those entries will override the entries on this screen.

---

This screen is maintained and updated by **FAMIS Services**.
The information is campus specific.

---

### Screen 308 – Printer Maintenance

<table>
<thead>
<tr>
<th>Func</th>
<th>Doc. Type</th>
<th>Form</th>
<th>Destination</th>
<th>Copies</th>
<th>JDE</th>
<th>EFORM</th>
<th>Class</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>PO FORM</td>
<td>POPT</td>
<td>PVAMPR1</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>-</td>
<td>PO REPORT</td>
<td>RPTS</td>
<td>PVAMPR1</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>-</td>
<td>BID FORM</td>
<td>BDPT</td>
<td>PVAMPR1</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>-</td>
<td>BID REPORT</td>
<td>RPTS</td>
<td>PVAMPR1</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
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<td>-</td>
<td>CO FORM</td>
<td>BDPT</td>
<td>PVAMPR1</td>
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<td>CO REPORT</td>
<td>RPTS</td>
<td>PVAMPR1</td>
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<td>______</td>
</tr>
</tbody>
</table>

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

Hmenu Help  EHelp

---

### Basic Steps
- View existing purchasing controls.
- Add/modify information in the available fields; press <ENTER> to record the information.

### Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ?, * or *)

#### Action Line
- **◆ Type:** 15 characters
  Identify the type of print batch to be displayed.

#### Screen Information
- **◆ Func:** 1 character
  Indicate whether printer information should be added (A), updated (U), or deleted (D) from the system.
**Screen 308 – Printer Maintenance (cont’d)**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Doc Type:</strong></td>
<td>10 characters Identify the type of print form to use in the batch process. Currently there are four types: PO Form, PO Report, BID Form, and BID Report.</td>
</tr>
<tr>
<td><strong>Form:</strong></td>
<td>6 characters/digits Indicate the form code defined for the print type.</td>
</tr>
<tr>
<td><strong>Destination:</strong></td>
<td>16 characters/digits Enter the printer destination for the output. Must be a JES defined printer.</td>
</tr>
<tr>
<td><strong>Copies:</strong></td>
<td>1 digit Type the number of copies to be printed.</td>
</tr>
<tr>
<td><strong>JDE:</strong></td>
<td>6 characters Identify the special JDE needed for Xerox printers.</td>
</tr>
<tr>
<td><strong>EFORM:</strong></td>
<td>6 characters Include the electronic form required for Xerox printers.</td>
</tr>
<tr>
<td><strong>Class:</strong></td>
<td>1 character Indicate the document class used to store the document.</td>
</tr>
<tr>
<td></td>
<td>L = Limited</td>
</tr>
<tr>
<td></td>
<td>E = Exempt</td>
</tr>
</tbody>
</table>

**Additional Functions**

**PF KEYS**  
See the Appendix for explanations of the standard PF keys.
Bid Lists – Basic Concepts

There are two different kinds of bid lists utilized by FAMIS, master lists and specific lists.

Specific Lists

Specific bid lists contain the names of the bidders to whom a bid document will be sent. A specific list cannot be created without referring to a bid document.

When your bid document is ready to be printed, all of the bidders on the list will be retrieved and a separate copy of the bid document will be printed for each one on the list.

Specific bid lists are also used to monitor whether or not a bidder has responded by submitting a bid for the selected goods and services.

There are three methods you can use to create a specific bid list. You can:

1. Copy a Master List to Specific List
2. Use the Bidder Specific List Create Screen, or
3. Copy an Existing Specific List to a new Specific List.

This section will discuss copying a master list to a specific list.

Master Lists (Not Used Often)

A master list is often created when you wish to maintain a list of “preferred bidders” or a list of bidders used on a regular basis for specific goods and services. A master list does not point to a specific bid document. However, you may copy a master list to a specific list in order to associate it with a specific bid document on-line.
Interrelations of Bid Module

- **COMMODITY FILE**
  - State Load (State Commodity File)
  - Weekly Download
  - State Uses NIGP (National Institute of Government Purchases)
  - Screen 451 (Local Commodity File)

- **BIDDER FILE** (Bid Vendors)
  - CMBL Load (State Bidder File)
  - Screen 452 (Local Bidder File)
  - Screen 456 (Copy Vendor to Bidder)

- **BIDDER/COMMODITY RELATIONSHIP FILE**
  - CMBL Load (State Commodity Relations File)
  - Screen 453 (Local Commodity Relations File)

- **MASTER BID LIST**

- **BID DOCUMENT**
  - Screens 410-416

- **SPECIFIC BID LIST OF QUALIFIED VENDORS**
  - Screen 422 (Create Specific List)

- **PRINTED BIDDER DOCUMENTS**

T:\Fa\DOC\WRK\PRCS\StudentBid Flow Chart.vsd
Create Master Bid Lists

There are many occasions where you might have a number of “preferred bidders” from whom you regularly receive bids for a particular commodity. Master lists are used to keep a running list of these preferred bidders. Screen 420 may be used to create a master list.

Screen 420 - Master List Create (Panel 1)

420 Master List Create                                         11/18/10 13:58
FY 2011  CC AM  
> Screen: ___ Commodity: 175____________ Mast. List: JCMAST1__________
> District: __ Type of funds: S  Add to existing List: N  Panel: 01 More >>
Buyer: ___ Comment: ___________________________________
Commodity Name: CHEMICAL LABORATORY EQUIPMENT AND SUPPLIES
Sel Bidder Name HUB Address
--- -----------------------------  - ----------------------------------------
_ ABT ASSOCIATES N 359 ALLSTON ST CAMBRIDGE MA
_ ALPINE BIOLOGICS INC N 300 CORPORATE DRIVE BLAUVELT NY
_ AMERICAN RESEARCH PRODUCTS INC A 489 COMMON STREET BELMONT MA
_ AMERICAN WHITE CROSS INC N FORMERLY NPM HEALTHC DAYVILLE CT
_ AMITOF BIOTECH INC A 20 LINDEN STREET ALLSTON MA
_ BUCK SCIENTIFIC N 58 FORT POINT ST E NORWALK CT
_ CAMBRIDGE ISOTOPE LABORATORIES N 50 FRONTAGE ROAD ANDOVER MA
_ CAPTAIR N ONE ELM SQUARE ROUTE NORTH ANDOVER MA
_ CORNING COSTAR CORP N 2219 WOODSTREAM BLVD SUGAR LAND TX
_ DIATECH DIAGNOSTICS, INC N P O BOX 860 BOSTON MA
** Press ENTER to View More Bidders ***
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
Hmenu Help EHelp All Left Right

Screen 420 - Master List Create (Panel 2)

420 Master List Create                                         01/17/07 13:58
FY 2007  CC AM  
> Screen: ___ Commodity: 175____________ Mast. List: JCMAST1__________
> District: __ Type of funds: S  Add to existing List: N  Panel: 02
Buyer: ___ Comment: ___________________________________
Commodity Name: CHEMICAL LABORATORY EQUIPMENT AND SUPPLIES
Sl Bidder Name Org Ge Pq QI St Cnt Cnt Bidder ID Expiration
--- ------------------- -- -- -- -- -- ------- ------- -------------- ----------
_ ABT ASSOCIATES                                     S10xxxxxxxxxx00 10/19/2010
_ ALPINE BIOLOGICS IN                                S10xxxxxxxxxx00 10/02/2010
_ AMERICAN RESEARCH P AS M                          S10xxxxxxxxxx00 04/25/2010
_ AMERICAN WHITE CROS                                S10xxxxxxxxxx00 10/06/2010
_ AMITOF BIOTECH INC  AS  M                          S10xxxxxxxxxx00 04/25/2010
_ BUCK SCIENTIFIC                                    S10xxxxxxxxxx00 10/02/2010
_ CAMBRIDGE ISOTOPE L                                S10xxxxxxxxxx00 10/19/2010
_ CAPTAIR                                          S10xxxxxxxxxx00 10/06/2010
_ CORNING COSTAR CORP                                S10xxxxxxxxxx00 10/06/2010
_ DIATECH DIAGNOSTICS                                S10xxxxxxxxxx00 10/20/2010
** Press ENTER to View More Bidders ***
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
Hmenu Help EHelp All Left Right
Basic Steps

Create a New Master List

- Type a commodity number or commodity name in the fields provided. You may also type an asterisk (*) to view a pop-up list of codes to select from.
- Type the name you would like to call the Master List and indicate whether you would like to list State bidders (S), local bidders (L), or both (B).

The first 7 characters of the bid list name must match the bid document. Also, a bid document must exist before you create a bid list.

- Press <ENTER> to bring up a list of bidders that may be added.
- Type an “X” next to all of the bidders you would like to add to your master list.
- Press <ENTER> to create the master list with the selected bidders or press PF6 to add all of the available bidders to your list.

Add to an Existing Master List

- Type the commodity code and master list name in the fields provided.
- Indicate whether you would like to list State bidders, local bidders, or both.
- Change the Add to existing List flag to “Y.”
- Press <ENTER> to bring up a list of bidders that may be added to your master list.
- Type an “X” next to all of the bidders you would like to add to your master list.
- Press <ENTER> to create the master list with the selected bidders.

Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ?, or *)

Action Line
◆ Commodity: 15 characters/digits
Indicate the name or code of the commodity for which you would like to build a master list of bidders.

◆ Mast. List: 22 characters/digits
Signify the name of the master list you would like to create or modify.

District: 2 digits
Indicate the district from which you would like to list bidders.

◆ Type of Funds: 1 character
Identify the type of funds used for the display: State (S), local (L) or both (B) State and local bidders.
Screen 420 – Bidder Master List Create (cont’d)

- **Add to Existing:** 1 character
  Type “Y” to add more bidders to an existing master list.

- **Buyer:** 3 characters
  Identify the buyer responsible for purchasing the selected goods and services.

- **Comment:** 35 characters
  Enter any special comment you would like to add about the master list.

- **Commodity Name:** 50 digits/characters
  Displays the commodity name of the goods or services for which bidders should be listed.

**Screen Information**

- **Panel 1**
  - **Sel:** 1 character
    Type “X” to select a bidder to be included on the master list.
  - **Bidder Name:** 28 characters
    Identifies the name of the person/business from which bids will be accepted.
  - **HUB:** 1 character
    Indicates the HUB status of the bidder: active HUB (A), a HUB on the CMBL (B), or not considered a HUB (N).
  - **Address:** 40 digits/characters
    Shows the mailing address where bid information will be sent.

- **Panel 2**
  - **Eth Org:** 2 characters
    Indicates the ethnic origin of the bidder.
    - BL = Black
    - AS = Asian
    - HI = Hispanic
    - AM = American Indian
    - WO = Woman Owned
  - **Ge:** 1 character
    Identifies the gender of the bidder’s business owner’s: male (M) or female (F).
  - **SB Fg:** 1 character
    Shows whether or not the bidder is classified as a small business fund group.
  - **QI:** 1 character
    Indicates whether or not the bidder is a Qualified Information Systems Vendor.
  - **St:** 1 character
    Identifies whether or not the bidder has an office in the State of Texas.
### Bid Cnt:
- **7 digits**
- Indicates the bid count for the bidder in the current fiscal year.

### Resp Cnt:
- **7 digits**
- Shows the bid response count for the bidder in the current fiscal year.

### Bidder ID:
- **13 characters/digits**
- Displays the bidder’s identification number assigned and preceded by either S (State) or L (local).

### Expiration Date:
- **8 digits**
- Indicates the date the bidder will go off the CMBL if they do not renew their application.

### Additional Functions

<table>
<thead>
<tr>
<th>PF KEYS</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>PF6</td>
<td>Select All Bidders</td>
</tr>
<tr>
<td>All</td>
<td>Used to select all available bidders for the master list (up to 51 bidders).</td>
</tr>
</tbody>
</table>
Copy a Master List to a Specific List

Specific bid lists are created each time a bid is created. This bid list is used to identify all of the bidders who will receive a copy of the printed bid document. The bid document contains all of the specifications about the goods and services to be purchased.

There are three methods you can use to create a specific bid list:

1. Copy a Master List to Specific List

2. Use the Bidder Specific List Create Screen (Screen 422)

OR

3. Copy an Existing Specific List to a new Specific List (Screen 426)

### Screen 421 - Copy Master List to Specific List (Panel 1)

<table>
<thead>
<tr>
<th>Sel</th>
<th>Bidder Name</th>
<th>HUB Address</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>AMERICAN WHITE CROSS INC</td>
<td>N FORMERLY NFM HEALTHC DAYVILLE CT</td>
</tr>
<tr>
<td></td>
<td>AMES COLOR FILE</td>
<td>N 12 PARK STREET SOMERVILLE MA</td>
</tr>
<tr>
<td></td>
<td>DESIGN CONTEMPO INC</td>
<td>N 129 MAIN STREET LISBON NH</td>
</tr>
<tr>
<td></td>
<td>MODERN SCHOOL SUPPLIES INC</td>
<td>N P O BOX 958 HARTFORD CT</td>
</tr>
<tr>
<td></td>
<td>MORSE WATCHMANS INC</td>
<td>A 2 MORSE ROAD OXFORD CT</td>
</tr>
<tr>
<td></td>
<td>PHASE ONE OFFICE PRODUCTS INC</td>
<td>A 89 FULKERSON STREET CAMBRIDGE MA</td>
</tr>
<tr>
<td></td>
<td>WRIGHT LINE INC</td>
<td>N 11511 ANGUS RD #1816 AUSTIN TX</td>
</tr>
</tbody>
</table>

*** End of Bidders List ***

### Screen 421 - Copy Master List to Specific List (Panel 2)

<table>
<thead>
<tr>
<th>Sel</th>
<th>Bidder Name</th>
<th>Eth Org Ge Fg QI St Cnt Cnt Bidder Id Expiration Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>AMERICAN WHITE CROSS INC</td>
<td>1 S10xxxxxxxxxxxx00 10/06/2010</td>
</tr>
<tr>
<td></td>
<td>AMES COLOR FILE</td>
<td>2 S10xxxxxxxxxxxx00 09/27/2010</td>
</tr>
<tr>
<td></td>
<td>DESIGN CONTEMPO INC</td>
<td>2 S10xxxxxxxxxxxx00 04/20/2010</td>
</tr>
<tr>
<td></td>
<td>MODERN SCHOOL SUPPL</td>
<td>1 S10xxxxxxxxxxxx00 04/23/2010</td>
</tr>
<tr>
<td></td>
<td>MORSE WATCHMANS INC</td>
<td>1 S10xxxxxxxxxxxx00 08/14/2010</td>
</tr>
<tr>
<td></td>
<td>PHASE ONE OFFICE PRODUCTS INC</td>
<td>1 S10xxxxxxxxxxxx00 01/01/2010</td>
</tr>
<tr>
<td></td>
<td>WRIGHT LINE INC</td>
<td>2 S10xxxxxxxxxxxx03 05/31/2010</td>
</tr>
</tbody>
</table>

*** End of Bidders List ***
Basic Steps

Create a New Specific List
- Advance to Screen 421.
- Type the name you would like to call the Specific List and indicate the master list from which you will be copying bidders.

The first 7 characters of the bid list name must match the bid document. Also, a bid document must exist before you create a bid list.

- Press <ENTER> to bring up a list of bidders that may be added to your list.
- Type an “X” next to all of the bidders you would like to add to your list.
- Press <ENTER> to create the specific list with the selected bidders.

Add to an Existing Master List
- Advance to Screen 420.
- Type the name of your specific list in the field provided.
- Change the Add to existing List flag to “Y.”
- Press <ENTER> to bring up a list of bidders that may be added to your list.
- Type an “X” next to all of the bidders you would like to add to your list.
- Press <ENTER> to create the specific list with the selected bidders.

Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ?, or *)

Action Line
◆ To Specific List: 20 characters/digits
Indicate the name of the specific bid list you would like to create. Generally, this will be the number of the bid document that the list is referencing.

◆ From Master List: 20 characters/digits
Signify the name of the master list from which bidders will be selected.

◆ Add to Existing List: 1 character
Type “Y” to add additional bidders to an existing specific list.

Commodity: 50 digits/characters
Identifies the name and commodity code of the goods and services for which bids will be accepted.

Screen Information
Panel 1
Sel: 1 digit
Type “X” to select a bidder for inclusion on the list.
Screen 421 – Copy Master List to Specific List (cont’d)

Bidder Name: 28 characters
Identifies the name of the person/ business from which bids will be accepted.

HUB: 1 character
Indicates the HUB status of the bidder: active HUB (A), a HUB on the CMBL (B), or not considered a HUB (N).

Address: 40 digits/characters
Identifies the mailing address where bid information will be sent.

Panel 2
Eth Org: 2 characters
Indicates the ethnic origin of the bidder.
- BL = Black
- AS = Asian
- HI = Hispanic
- AM = American Indian
- WO = Woman Owned

Ge: 1 character
Identifies the gender of the business owner: male (M) or female (F).

SB Fg: 1 character
Shows whether or not the bidder is classified as a small business fund group.

QI: 1 character
Indicates whether or not the bidder is a Qualified Information Systems Vendor.

St: 1 character
Identifies whether or not the bidder has an office in the State of Texas.

Bid Cnt: 7 digits
Indicates the bid count for the bidder in the current fiscal year.

Resp Cnt: 7 digits
Shows the bid response count for the bidder in the current fiscal year.

Bidder ID: 13 characters/digits
Displays the bidder’s identification number preceded by either S (State) or L (local).

Expiration Date: 8 digits
Indicates the date the bidder will go off the CMBL if they do not renew their application.

Additional Functions
PF KEYS
See the Appendix for an explanation of the standard PF keys.

PF6 Select All Bidders
All
Used to select all available bidders for the list.
Create a Specific Bid List

Specific bid lists are created each time a bid is created. This bid list is used to identify all of the bidders who will receive a copy of the printed bid document. The bid document contains all of the specifications about the goods and services to be purchased.

There are three methods you can use to create a specific bid list:

1. Copy a Master List to Specific List
2. Use the Bidder Specific List Create Screen
   OR
3. Copy an Existing Specific List to a new Specific List

Screen 422 - Specific List Create (Panel 1)

This screen can be used multiple times for different commodities using the same bid list number.

Screen 422 - Specific List Create (Panel 2)
Basic Steps

Create a New Specific List
- Type the commodity code and the name you would like to call the Specific List (usually the bid document number) in the fields provided and indicate whether you would like to list local bidders, State bidders, or both.

The first 7 characters of the bid list name must match the bid document. Also, a bid document must exist before you create a bid list.

- Press <ENTER> to bring up a list of bidders that may be added to your list.
- Type an “X” next to all of the bidders you would like to add to your list.
- Press <ENTER> to access the specific list pop-up window where you should type the opening date.
- Press <ENTER> to create the specific list with the selected bidders.

Add to an Existing Specific List
- Type the name of your specific list in the Spec. List field.
- Change the Add to existing List flag to “Y.”
- Press <ENTER> to bring up a list of bidders that may be added to your list.
- Type an “X” next to all of the bidders you would like to add to your list.
- Press <ENTER> to update the specific list with the selected bidders.

Specific Bid List Process

Create a New Specific Bid List
When a specific bid list is created, a pop-up window will be displayed. The bid opening date and time will be retrieved from the bid document if it was entered when setting up the bid document on Screen 410. If the information was not entered on Screen 410, the default bid open time will be retrieved from Screen 311 and displayed. You may use this pop-up window to enter or correct any information about the bid opening date or time.

Specific List Create Pop-Up Window

Any changes to the bid open date and time made using this pop-up window will also be reflected on Screen 410.
Field Descriptions (◆ = Required;  Help = Field Help Available Using PF2, ? or *)

**Action Line**
- **Commodity:** 15 characters/digits
  Indicate the commodity code of the goods and services for which bids will be accepted.
- **Spec. List:** 20 characters/digits
  Enter a name for the specific bid list to be created. Usually this will be the bid document that the list is referencing.
- **District:** Help 2 digits
  Signify the particular State district from which you would like to list bidders.
- **Type of Funds:** 1 character
  Enter the type of funds for the bidders you wish to display: State (S), local (L) or both (B) State and local bidders.
- **Add to Existing List:** 1 character
  Type “Y” to add more bidders to an existing master list.
- **Commodity Name:** 50 characters
  Identifies the commodity code and name of the goods and services for which bids will be accepted.

**Screen Information**

**Panel 1**
- **Sel:** 1 character
  Type “X” to select a bidder for inclusion on the list.
- **Bidder Name:** 30 characters
  Identifies the name of the person/business from which bids will be accepted.
- **HUB:** 1 character
  Indicates the HUB status of the bidder: active HUB (A), a HUB on the CMBL (B), or not considered a HUB (N).
- **Address:** 40 digits/characters
  Identifies the mailing address where bid information will be sent.

**Panel 2**
- **Eth Org:** 2 characters
  Indicates the ethnic origin of the bidder. Examples:
  - BL = Black
  - AS = Asian
  - HI = Hispanic
- **Ge:** 1 character
  Identifies the gender of the bidder’s business owner: male (M) or female (F).
### Screen 422 – Specific List Create (cont’d)

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SB Fg:</strong></td>
<td>1 character&lt;br&gt;Shows whether or not the bidder is considered a small business fund group.</td>
</tr>
<tr>
<td><strong>QI:</strong></td>
<td>1 character&lt;br&gt;Indicates whether or not the bidder is a Qualified Information Systems Vendor.</td>
</tr>
<tr>
<td><strong>St:</strong></td>
<td>1 character&lt;br&gt;Identifies whether or not the bidder has an office in the State of Texas.</td>
</tr>
<tr>
<td><strong>Bid Cnt:</strong></td>
<td>7 digits&lt;br&gt;Indicates the bid count for the bidder in the current fiscal year.</td>
</tr>
<tr>
<td><strong>Resp Cnt:</strong></td>
<td>7 digits&lt;br&gt;Shows the bid response count for the bidder in the current fiscal year.</td>
</tr>
<tr>
<td><strong>Bidder ID:</strong></td>
<td>13 characters/digits&lt;br&gt;Displays the bidder’s identification number preceded by either S (State) or L (local).</td>
</tr>
<tr>
<td><strong>Expiration Date:</strong></td>
<td>8 digits&lt;br&gt;Indicates the date the bidder will go off the CMBL if they do not renew their application.</td>
</tr>
</tbody>
</table>

### Additional Functions

<table>
<thead>
<tr>
<th>PF KEYS</th>
<th>See the Appendix for an explanation of the standard PF keys.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PF6</strong></td>
<td><strong>Select All Bidders</strong>&lt;br&gt;Used to select all available bidders for the list.</td>
</tr>
</tbody>
</table>
Copy Exist. Specific List to New Specific List

Specific bid lists are created each time a new bid document is created. This bid list is used to identify all of the bidders who will receive a copy of the printed bid document.

Often you may find yourself regularly ordering the same commodities. When this happens, it is to your advantage to simply re-use an old bid list. Although a new specific bid list must be created for each new bid document, Screen 426 may be used to copy an existing bid list to a new one, so that it may be used again.

Screen 426 - Copy Specific List to Specific List (Panel 1)

Screen 426 - Copy Specific List to Specific List (Panel 2)
Basic Steps

- Type the name you would like to call the new bid list and the name of the existing bid list in the fields provided.

  The first 7 characters of the bid list name must match the bid document. Also, a bid document must exist before you create a bid list.

- Indicate whether or not you would like to add to an existing list and type the commodity code for which you would like to list bidders.
- Press <ENTER> to bring up a list of available bidders.
- Type an “X” next to each of the bidders you would like to add to your list.
- Press <ENTER> to access the specific list pop-up window where you should add or modify the opening date information.
- Press <ENTER> to create the specific list with the selected bidders.

Specific Bid List Process

Create a New Specific Bid List

When a specific bid list is created, a pop-up window will be displayed. The bid opening date and time will be retrieved from the bid document if it was entered when setting up the bid document on Screen 410. If the information was not entered on Screen 410, the default bid open time will be retrieved and displayed. You may use this pop-up window to enter or correct any information about the bid opening date or time.

Creating a New Specific List Pop-Up Window

| Buyer: jmk       |
| Comment: microscopes   |
| Bid Document: B700001_    |
| Opening Date: 07/22/05   |
| Opening Time: 06:00 PM   |
| PF4 = Exit            |

Any changes to the bid open date and time made using this pop-up window will also be reflected on Screen 410.

Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ?, or *)

Action Line

◆ To Specific List: 15 characters/digits
  Enter a name for the new specific bid list.
### Screen 426 – Copy Specific List to Specific List (cont’d)

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>From Specific List</td>
<td>Indicate the name of the specific list you would like to copy from.</td>
</tr>
<tr>
<td>Add to Existing List</td>
<td>Type “Y” to add bidders to an existing specific list.</td>
</tr>
<tr>
<td>Commodity:</td>
<td>Identify the commodity code of the goods or services for which you will be accepting bids.</td>
</tr>
<tr>
<td>Name:</td>
<td>Displays the name of the commodity for which you will be accepting bids.</td>
</tr>
</tbody>
</table>

#### Screen Information

**Panel 1**

- **Sel:** 1 character
  - Type “X” to select a bidder for inclusion on the list.

- **Bidder Name:** 30 characters
  - Identifies the name of the bidder from which bids will be accepted.

- **HUB:** 1 character
  - Indicates the HUB status of the bidder: active HUB (A), a HUB on the CMBL (B), or not considered a HUB (N).

- **Address:** 40 digits/characters
  - Identifies the mailing address where bid information will be sent.

**Panel 2**

- **Eth Org:** 2 characters
  - Indicates the ethnic origin of the bidder.
  - BL = Black
  - AS = Asian
  - HI = Hispanic
  - AM = American Indian
  - WO = Woman Owned

- **Ge:** 1 character
  - Identifies if the bidder’s business owner’s gender is male (M) or female (F).

- **SB Fg:** 1 character
  - Shows whether or not the bidder is considered a small business fund group.

- **QI:** 1 character
  - Indicates whether or not the bidder is a Qualified Information Systems Vendor.

- **St:** 1 character
  - Identifies whether or not the bidder has an office in the State of Texas.
**Screen 426 – Copy Specific List to Specific List (cont’d)**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Bid Cnt:</strong></td>
<td>7 digits</td>
</tr>
<tr>
<td></td>
<td>Indicates the bid count for the bidder in the current fiscal year.</td>
</tr>
<tr>
<td><strong>Resp Cnt:</strong></td>
<td>7 digits</td>
</tr>
<tr>
<td></td>
<td>Shows the bid response count for the bidder in the current fiscal year.</td>
</tr>
<tr>
<td><strong>Bidder ID:</strong></td>
<td>13 characters/digits</td>
</tr>
<tr>
<td></td>
<td>Displays the identification number assigned to the bidder preceded by either S (State) or L (Local).</td>
</tr>
<tr>
<td><strong>Expiration Date:</strong></td>
<td>8 digits</td>
</tr>
<tr>
<td></td>
<td>Indicates the date the bidder will go off the CMBL if they do not renew their application.</td>
</tr>
</tbody>
</table>

**Additional Functions**

<table>
<thead>
<tr>
<th>PF KEYS</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PF6</td>
<td>Select All Bidders</td>
</tr>
<tr>
<td>All</td>
<td>Used to select all available bidders for the list.</td>
</tr>
</tbody>
</table>
Modify the Bidders for a Particular List

It is possible for you to display a list of all of the bidders that are on a particular bid list using Screen 423. You may also use this screen to add additional bidders or delete bidders from the list.

### Screen 423 - Bid List Bidder Modify (Panel 1)

<table>
<thead>
<tr>
<th>F Typ</th>
<th>Bidder Name</th>
<th>Commodity</th>
<th>Eth</th>
<th>Sm</th>
<th>Tx</th>
<th>Hub</th>
<th>Bidr</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>AMERICAN WHITE CROSS IN</td>
<td>425</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>N</td>
</tr>
<tr>
<td></td>
<td>AMES COLOR FILE</td>
<td>425</td>
<td>Y</td>
<td>N</td>
<td></td>
<td></td>
<td>N</td>
</tr>
<tr>
<td></td>
<td>DESIGN CONTEMPO INC</td>
<td>425</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>N</td>
</tr>
<tr>
<td></td>
<td>MODERN SCHOOL SUPPLIES</td>
<td>425</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>N</td>
</tr>
<tr>
<td></td>
<td>MORSE WATCHMANS INC</td>
<td>425</td>
<td>HI</td>
<td>M</td>
<td>A</td>
<td></td>
<td>A</td>
</tr>
<tr>
<td></td>
<td>PHASE ONE OFFICE PRODUC</td>
<td>425</td>
<td>BL</td>
<td>M</td>
<td>A</td>
<td></td>
<td>A</td>
</tr>
<tr>
<td></td>
<td>WRIGHT LINE INC</td>
<td>425</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Y</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

### Screen 423 - Bid List Bidder Modify (Panel 2)

<table>
<thead>
<tr>
<th>F Typ</th>
<th>Bidder Id</th>
<th>Bidder Name</th>
<th>Commodity</th>
<th>Hub</th>
<th>Expire Dt</th>
<th>Bid</th>
<th>Resp</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>10xxxxxxxxx00</td>
<td>AMERICAN WHITE CROSS IN</td>
<td>N</td>
<td>10/06/1997</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>10xxxxxxxxx00</td>
<td>AMES COLOR FILE</td>
<td>N</td>
<td>09/27/1997</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>10xxxxxxxxx00</td>
<td>DESIGN CONTEMPO INC</td>
<td>N</td>
<td>04/20/1998</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>10xxxxxxxxx00</td>
<td>MODERN SCHOOL SUPPLIES</td>
<td>N</td>
<td>04/23/1998</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>10xxxxxxxxx00</td>
<td>MORSE WATCHMANS INC</td>
<td>A</td>
<td>08/14/1996</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>10xxxxxxxxx00</td>
<td>PHASE ONE OFFICE PRODUC</td>
<td>A</td>
<td>01/01/1997</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>10xxxxxxxxx03</td>
<td>WRIGHT LINE INC</td>
<td>N</td>
<td>05/31/1998</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Basic Steps

Add Additional Bidders to the List
- Type the list type and list name in the fields provided.
- Press <ENTER> to display all the bidders for the list.
- <TAB> to the F (Function) field, type an “A” and press <ENTER> to access the pop-up window.
- Type the type of bidder to be added, the commodity for which it will be bidding, and the name of the bidder. If you do not know the exact name of the bidder, type an asterisk (*) to access the bidder search window.
- Press <ENTER> to add the bidder to your list and return to Screen 423.

Remove Bidders from the List
- Type the list type and list name in the fields provided.
- Press <ENTER> to display all the bidders for the list.
- <TAB> to the F (Function) field and type a “D.”
- Press <ENTER> to remove the selected bidder from the bid list.

Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

Action Line
◆ Type: [Help] 1 character
   Indicate whether you wish to display a Specific (S) or Master (M) bid list.

◆ List: 20 characters/digits
   Identify the name or number of the bid list you would like to display.

List by Commodity: 1 character
   Type “Y” to list the bidders by the commodity they are bidding on.
Screen Information

Panel 1

Buyer: 3 characters
Displays the initials of the buyer responsible for the purchase of the selected goods/services.

Comment: 50 characters
Identifies any special comments about the selected bid list.

F: 1 character
Identify the function to perform.
A = Add a bidder
D = Delete a bidder
P = Position a bidder at the top of the list (not always available).
U = Update record

Bdr Typ: 1 character
Indicates whether the bidder type is State (S) or local (L).

Bidder Name: 28 characters
Shows the name of the person/business from which bids will be accepted.

Commodity: 15 digits/characters
Signifies the goods and services for which the bidder will be contacted.

Eth Org: 2 characters
Indicates the ethnic origin of the bidder.
BL = Black
AS = Asian
HI = Hispanic
AM = American Indian
WO = Woman Owned

G: 1 character
Shows the bidder’s business owner's gender: male (M) or female (F).

Sm Bus: 1 character
Indicates whether or not (“Y” or “N”) the bidder is classified as a small business.

Tx Off: 1 character
Specifies whether or not (“Y” or “N”) the bidder has a Texas office location.

HUB St: 1 character
Indicates whether the bidder's HUB status is active (A) or not active (N).

Bidr Stat: 1 character
Indicates whether the bidder's status has been frozen (F) or deleted (D).
Panel 2

Bidder Id: 13 characters/digits
Displays the bidder's identification code.

HUB Expire Dt: 8 digits
Signifies the date that the bidder's HUB status will expire.

Bid Cnt: 7 digits
Indicates the bid count for the bidder in the current fiscal year.

Resp Cnt: 7 digits
Shows the number of bids the bidder has responded to in the current fiscal year.

Additional Functions

PF KEYS
See the Appendix for an explanation of the standard PF keys.

PF8 Commodities
Comm
Used to display the names of the goods and services on the bid document.

PF9 Additional Bidders
AdBdr
Used to add additional bidders to the selected bid list.

PF12 Warnings
Warns
Displays any FAMIS warnings (if there are any).
Modify the Bid List Header

It is possible for you to display a list of all of the commodity codes that are on a particular bid list using **Screen 424**. You may also use this screen to update general list information, such as the buyer or comments, on the bid header.

When displaying a specific bid list, you may also use this screen to delete commodity codes from the list.

If you choose to remove a commodity code from a specific bid list, you will remove all bidders from the list associated with that commodity code.

**Screen 424 - Bid List Header Maintenance**

![Screen 424 - Bid List Header Maintenance](image)

**Basic Steps**

**Modify the Bid List Header**

- Type a list type and list name in the fields provided and press <ENTER> to display the bid list header information and commodity codes.
- Add or modify data in the available fields, as desired, and press <ENTER> to record the bid list information.

**Remove Commodity Codes from a Specific Bid List**

- Type the list type and list name in the fields provided and press <ENTER> to display the bid list header information and commodity codes for the selected specific bid list.
- Type a “D” next to the commodity codes that you would like to remove from the specific bid list. If bidders exist on the list for the specified commodity code, a pop-up window will be displayed asking if you still wish to delete the commodity code and all of its associated bidders. Type “Y” if you wish to continue.
- Press <ENTER> to remove the selected commodity codes from the bid list.
Screen 424 – Bid List Header Maintenance (cont’d)

Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ?, or *)

**Action Line**
- ◆ Type: Help 1 character
  Indicate whether you wish to display a specific (S) or master (M) bid list.

- ◆ List: 20 characters/digits
  Identify the bid list you would like to display.

**Screen Information**
- Buyer: 3 characters
  Displays the initials of the buyer responsible for the purchase of the selected goods/services.

- Comments: 50 characters
  Shows any special comments about the bid list.

**Specific Bid Lists Only**
- Bid Document: 7 digits/characters
  Shows the bid document associated with bid list.

- Opening Date: 8 digits
  Indicates the date that the bid is to be opened.

- Opening Time: 8 digits
  Identifies the time that the bid is to be opened.

**Commodity Codes**
- ◆ Enter “D” to Delete: 1 character
  Type “D” if to delete commodity from the bid list.

**Additional Functions**
- PF KEYS
  See the Appendix for an explanation of the standard PF keys.
Set and Reset Bid List Flags

General list maintenance is performed using Screen 428. A bid list may be deleted or frozen from further activity using this screen.

**Screen 428 - Bid List Flag Maintenance**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>&gt; Screen: ___ Type List: S List: B800002_____________</td>
<td></td>
</tr>
<tr>
<td>B800002</td>
<td>Buyer: DDD   DORIANNA DENNISON Comment:</td>
</tr>
<tr>
<td></td>
<td>N Delete Bid List N Freeze Bid List</td>
</tr>
<tr>
<td></td>
<td>Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---</td>
</tr>
<tr>
<td></td>
<td>Hmenu Help  EHelp</td>
</tr>
</tbody>
</table>

**Basic Steps**
- Indicate whether you wish to access a Master (M) or Specific (S) bid list in the **Type** field, and include the list name in the **List** field.
- Press <ENTER> to access the current list flag settings.
- Type “Y” (yes) or “N” (no) in the Delete Bid List field or Freeze Bid List field, and press <ENTER> to record bid flag changes.

**Field Descriptions** *(◆ = Required; Help = Field Help Available Using PF2, ?, or *)

**Action Line**
- ◆ Type List: [Help] 1 character
  Identify whether you wish to access a master (M) or specific (S) bid list.
- ◆ List: 20 characters/digits
  Indicate the name of the bid list you would like to modify.

**Screen Information**
- Buyer: 3 characters
  Displays the initials and name of the buyer responsible for purchasing the selected commodities.
- Comment: 20 characters
  Displays comments concerning the bid list.
Screen 428 – Bid List Flag Maintenance (cont’d)

- **Delete Bid List:** 1 character
  Indicate whether or not (“Y” or “N”) you wish to remove the entire bid list from the system.

- **Freeze Bid List:** 1 character
  Signify whether or not (“Y” or “N”) you wish to restrict the bid list from any further activity.

**Additional Functions**

**PF KEYS**

See the Appendix for an explanation of the standard PF keys.
Maintain Response Information for a Bid List

It is possible for you to monitor bid list activity on-line. You may use Screen 430 to record information as it comes in from the bidders. For example, this screen may be used to indicate whether or not any bids have been received from a selected bidder.

This screen will give you an overall snapshot of activity by the bidders for a selected bid list.

Screen 430 - Bid List Response

<table>
<thead>
<tr>
<th>F</th>
<th>Resp</th>
<th>Commodity</th>
<th>Type</th>
<th>Bidder ID</th>
<th>Bidder Name</th>
<th>Stat</th>
</tr>
</thead>
<tbody>
<tr>
<td>_</td>
<td>_</td>
<td>988-36</td>
<td>S</td>
<td>1xxxxxxxxx0 A LAWN AND LANDCARE SERVICES</td>
<td>C</td>
<td></td>
</tr>
<tr>
<td>_</td>
<td>_</td>
<td>988-36</td>
<td>L</td>
<td>1xxxxxxxxx0AC ABB PEST &amp; LAWN SERVICES</td>
<td>C</td>
<td></td>
</tr>
<tr>
<td>_</td>
<td>_</td>
<td>988-36</td>
<td>S</td>
<td>1xxxxxxxxx0 ALCORE LANDSCAPING</td>
<td>D</td>
<td></td>
</tr>
<tr>
<td>_</td>
<td>_</td>
<td>988-36</td>
<td>S</td>
<td>1xxxxxxxxx0 BIE LANDSCAPE &amp; MAINTENANCE</td>
<td>D</td>
<td></td>
</tr>
<tr>
<td>_</td>
<td>_</td>
<td>988-36</td>
<td>S</td>
<td>1xxxxxxxxx0 ELAN TURFCARE GROUP, LLC</td>
<td>D</td>
<td></td>
</tr>
<tr>
<td>_</td>
<td>_</td>
<td>988-36</td>
<td>S</td>
<td>1xxxxxxxxx0 INNER TREE CARE &amp; LANDSCAP</td>
<td>D</td>
<td></td>
</tr>
</tbody>
</table>

Basic Steps

• Type the name of the specific list you would like to display and press <ENTER> to access the current list of bidders and their responses.

• You may now <TAB> to the Resp (Response) field and indicate whether the bidder has submitted a bid (B), responded but did not submit a bid (R), or whether the bidder has not responded at all (N).

• Press <ENTER> to record bid responses.

Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

Action Line

◆ List: 20 characters
  Type the name of the bid list you would like to modify.

Buyer: 3 characters
  Displays the identification code and name of the buyer responsible for purchasing the selected commodities.
Screen Information

F: 1 character
Indicate which function you wish to perform.
A = Add an additional record
P = Position a record at the top of the listing.

Resp: 1 character
Signify whether the bidder has submitted a bid (B), responded but not submitted a bid (R), or not responded (N).

Commodity: 15 digits
Displays the commodity code that identifies the goods and services for which bids are being accepted.

Type: 1 character
Indicates whether the bidder is a State (S) or local (L) bidder.

Bidder ID: 13 characters/digits
Displays the bidder identification number.

Bidder Name: 30 characters
Shows the name of the bidder selected.

Stat: 1 character
Indicates whether the bidder’s status has been frozen from activity (F) or deleted (D). If a commodity code has not been set up for the bidder, an asterisk (*) will be displayed.

Additional Functions

PF KEYS See the Appendix for an explanation of the standard PF keys.

PF10 Commodity
Used to display the names of the goods and services on the bid document.
Bid Lists Inquiry – Basic Concepts

Inquiry Access

Access to bid lists depends on a number of factors. For example, your user security must match certain data on the bid list 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 bid lists for their individual department.

Position the Display

Several bid list inquiry screens allow you to position a particular document at the top of the screen. This is accomplished by entering as much information on the Action Line as possible. For example, entering particular master order name on the Action Line of Screen 480 will display that list on the first informational line of the listing.

Use the PF Keys

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

You may view a list of all master bid lists on FAMIS using Screen 480. Press <ENTER> to scroll through the names displayed.

Screen 480 - Master List Browse

<table>
<thead>
<tr>
<th>Sel</th>
<th>List Name</th>
<th>Buy</th>
<th>Commodity</th>
<th>Commodity Name</th>
<th>Comments</th>
<th>St</th>
</tr>
</thead>
<tbody>
<tr>
<td>_</td>
<td>AUTO</td>
<td>07039</td>
<td>STATION WAGONS AN</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>_</td>
<td>BAC/COM-ADD</td>
<td>48066</td>
<td>DRIVES: TAPE DRIV</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>_</td>
<td>BROWN STOVE</td>
<td>04560</td>
<td>RANGES, STOVE TOP</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>_</td>
<td>BURGOON CO.</td>
<td>19085</td>
<td>SODIUM PHOSPHATES</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>_</td>
<td>BURST ELECTRONICS</td>
<td>84086</td>
<td>VIDEO SYSTEMS (FO</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>_</td>
<td>B000025</td>
<td>92045</td>
<td>SOFTWARE MAINTENA</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>_</td>
<td>B000811</td>
<td>420</td>
<td>FURNITURE: CAFETE</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>_</td>
<td>B300448</td>
<td>64030</td>
<td>MAILING TUBES AND</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>_</td>
<td>B300461</td>
<td>928</td>
<td>EQUIPMENT MAINTEN</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>_</td>
<td>B300474</td>
<td>64030</td>
<td>MAILING TUBES AND</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>_</td>
<td>B300626</td>
<td>928</td>
<td>EQUIPMENT MAINTEN</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>_</td>
<td>B400208</td>
<td>96113</td>
<td>CHARTERING SERVIC</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

More Entries - Press <ENTER> to continue

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

Basic Steps

- Type a list name in the Master List field. You may also type a partial name to view a list of all available names that match. Type a question mark (?) in this fields to use the search feature.
- Press <ENTER> to display a list of all master lists on the system, beginning with the list specified on the Action Line.
- Type an “X” next to a bid list and press <ENTER> to advance to Screen 497 to view the bidders for the list.

Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

Action Line

Master List: 20 characters
Help
Enter the name of the master bid list you would like to place on the first line of the display.

Screen Information

Sel: 1 digit
Type “X” to select the bid list for further display on Screen 497.

List Name: 20 characters/digits
Displays the master bid lists.
Buy: 3 characters
Indicates the initials of the buyer responsible for the purchase of the commodities.

Commodity: 15 digits
Shows the commodity code associated with the master order.

Commodity Name: 15 characters
Displays the commodity name associated with the master order.

Comments: 10 characters
Displays any comments about the master list, as entered on the master list header.

St: 1 character
Indicates the status of the list: frozen (F), or deleted (D) from further activity.

**Additional Functions**

PF KEYS
See the Appendix for an explanation of the standard PF keys.
Display Master Lists by Commodity Code

You may view a list of all master bid lists on the system, sorted by their commodity code, using Screen 481.

Screen 481 - Master List Browse by Commodity

<table>
<thead>
<tr>
<th>Sel</th>
<th>List Name</th>
<th>Buy</th>
<th>Commodity</th>
<th>Commodity Name</th>
<th>Comments</th>
<th>St</th>
</tr>
</thead>
<tbody>
<tr>
<td>---</td>
<td>---------------</td>
<td>---</td>
<td>----------</td>
<td>--------------------</td>
<td>----------</td>
<td>----</td>
</tr>
<tr>
<td>_</td>
<td>CARPET</td>
<td>36010</td>
<td>CARPETS AND RUGS:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>_</td>
<td>MAP-VACUUM CLEANERS</td>
<td>36580</td>
<td>VACUUM CLEANERS,</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>_</td>
<td>MAP-FUME HOODS</td>
<td>41552</td>
<td>FUME HOODS, LAMIN</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>_</td>
<td>B000811</td>
<td>420</td>
<td>FURNITURE: CAFE</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>_</td>
<td>STAR LINEN</td>
<td>42080</td>
<td>PILLOWS, SYNTHETI</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>_</td>
<td>FCO-TOOLS</td>
<td>FCO 44506</td>
<td>BITS, DIES, DRIVE</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>_</td>
<td>JSW-TAPS/DIES</td>
<td>JSW 44506</td>
<td>BITS, DIES, DRIVE</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>_</td>
<td>MAP-BATTERY DRY CELL</td>
<td>45006</td>
<td>BATTERIES, DRY CH</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>_</td>
<td>MAP-REFUSE CONT/HOLD</td>
<td>45065</td>
<td>REFUSE CARTS, CHU</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>_</td>
<td>VALLEYLAB</td>
<td>46599</td>
<td>COMMODITIES NOT O</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>_</td>
<td>MEMORY</td>
<td>48015</td>
<td>ADD-ON DEVICES:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>_</td>
<td>B801111</td>
<td>48031</td>
<td>CENTRAL PROCESSIN</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

More Entries - Press <ENTER> to continue
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
Hmenu Help  EHelp

Basic Steps

- If desired, type a commodity number in the **Commodity** field or a master list name in the **Master List** field.
- Press <ENTER> to display a list of all master lists on the system, beginning with the commodity/list specified on the Action Line.
- Type an “X” next to a bid list and press <ENTER> to advance to Screen 497.

Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

**Action Line**

**Commodity:** ◆ 15 characters
Enter the desired commodity code number to display available master lists.

**Master List:** ◆ 20 characters/digits
Include the name of the master bid list to place it on the first line of the display.

**Screen Information**

**Sel:** ◆ 1 character
Type “X” and press <ENTER> to select the bid list for further display on Screen 497.

**List Name:** 20 characters
Displays the name of the master bid list.
### Screen 481 – Master List Browse by Commodity (cont’d)

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Buy:</strong></td>
<td>3 characters Indicates the initials of the buyer responsible for the purchase of the commodities.</td>
</tr>
<tr>
<td><strong>Commodity:</strong></td>
<td>15 digits Indicates the commodity code associated with the master list.</td>
</tr>
<tr>
<td><strong>Commodity Name:</strong></td>
<td>15 characters Displays the full name of the commodity associated with the master list.</td>
</tr>
<tr>
<td><strong>Comments:</strong></td>
<td>10 characters Displays any comments about the master list, as entered on the master list header.</td>
</tr>
<tr>
<td><strong>St:</strong></td>
<td>1 character Indicates whether or not the list's status has been frozen (F) or deleted (D) from further activity.</td>
</tr>
</tbody>
</table>

**Additional Functions**

**PF KEYS**

See the Appendix for an explanation of the standard PF keys.
## Display Bidders for a Master List

You may display a list of all bidders associated with a master list using **Screen 497**. You may position a bidder on the top line of the display by specifying the bidder’s name in the **Bidder** field.

### Screen 497 - Master List Bidders (Panel 1)

<table>
<thead>
<tr>
<th>Bidder Name</th>
<th>HUB</th>
<th>St Comm</th>
<th>Bid to Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>PDD FLOORS INC</td>
<td>36010</td>
<td>600 CALLIE RD</td>
<td>DALTON</td>
</tr>
<tr>
<td>PDD FLOORS INC</td>
<td>36010</td>
<td>600 CALLIE RD</td>
<td>DALTON</td>
</tr>
<tr>
<td>ROBERT ROGERS OFFICE FURNI</td>
<td>36010</td>
<td>1300 W GARY ST</td>
<td>HOUSTON</td>
</tr>
<tr>
<td>TEX FLOOR SERVICE INC</td>
<td>36010</td>
<td>2000 SINTNER</td>
<td>HOUSTON</td>
</tr>
<tr>
<td>TEX FLOOR SERVICE INC</td>
<td>36010</td>
<td>2066 SINTNER</td>
<td>HOUSTON</td>
</tr>
<tr>
<td>WARE FURNITURE CO</td>
<td>36010</td>
<td>1214 SAMSON AVE</td>
<td>HUNTSVILLE</td>
</tr>
<tr>
<td>WARE FURNITURE CO</td>
<td>36010</td>
<td>1214 SAMSON AVE</td>
<td>HUNTSVILLE</td>
</tr>
</tbody>
</table>

### Screen 497 - Master List Bidders (Panel 2)

<table>
<thead>
<tr>
<th>Bidder Name</th>
<th>HUB</th>
<th>Phone</th>
<th>Fax</th>
</tr>
</thead>
<tbody>
<tr>
<td>PDD FLOORING INC</td>
<td>7068888816</td>
<td>7068888882</td>
<td></td>
</tr>
<tr>
<td>PDD FLOORING INC</td>
<td>7061111116</td>
<td>7062779793</td>
<td></td>
</tr>
<tr>
<td>ROBERT ROGERS OFFICE FURNI</td>
<td>7135222221</td>
<td>7135444444</td>
<td></td>
</tr>
<tr>
<td>ROBERT ROGERS OFFICE FURNI</td>
<td>7132225551</td>
<td>7135222225</td>
<td></td>
</tr>
<tr>
<td>TEX FLOOR SERVICE INC</td>
<td>71396689777</td>
<td>71396666645</td>
<td></td>
</tr>
<tr>
<td>TEX FLOOR SERVICE INC</td>
<td>7139456456</td>
<td>7137777946</td>
<td></td>
</tr>
<tr>
<td>WARE FURNITURE CO</td>
<td>4092112254</td>
<td>4092999997</td>
<td></td>
</tr>
<tr>
<td>WARE FURNITURE CO</td>
<td>4098888814</td>
<td>4092111118</td>
<td></td>
</tr>
</tbody>
</table>
Screen 497 – Bidders for Master List (cont’d)

Screen 497 - Master List Bidders (Panel 3)

<table>
<thead>
<tr>
<th>Action Line</th>
<th>Screen 497 Master List Bidders</th>
<th>11/18/10 15:35</th>
</tr>
</thead>
<tbody>
<tr>
<td>&gt; Screen: ___ List:</td>
<td>List: CARPET</td>
<td>FY 2011 CC 02</td>
</tr>
<tr>
<td>&gt; Bidder: PDD</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Buyer:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Comments:</td>
<td>Freeze: N</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Delete: N</td>
<td></td>
</tr>
<tr>
<td>Sel</td>
<td>Bidder Name</td>
<td>Org Ge Fg QI</td>
</tr>
<tr>
<td>---</td>
<td>-------------</td>
<td>-------------</td>
</tr>
<tr>
<td></td>
<td>PDD FLOORING INC</td>
<td>BL</td>
</tr>
<tr>
<td></td>
<td>PDD FLOORING INC</td>
<td>BL</td>
</tr>
<tr>
<td></td>
<td>ROBERT ROGERS OFFICE</td>
<td>F</td>
</tr>
<tr>
<td></td>
<td>ROBERT ROGERS OFFICE</td>
<td>F</td>
</tr>
<tr>
<td></td>
<td>TEX FLOOR SERVICE</td>
<td></td>
</tr>
<tr>
<td></td>
<td>TEX FLOOR SERVICE</td>
<td></td>
</tr>
<tr>
<td></td>
<td>WARE FURNITURE CO</td>
<td></td>
</tr>
<tr>
<td></td>
<td>WARE FURNITURE CO</td>
<td></td>
</tr>
</tbody>
</table>

End of Bidders

Basic Steps

- Type a master list name in the List field.
- If desired, type a bidder name in the Bidder field.
- Press <ENTER> to display a list of all bidders associated with the list, beginning with the bidder specified on the Action Line.
- Type an “X” next to a bidder and press <ENTER> to advance to Screen 463.

Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ?, or *)

**Action Line**

- ◆ List: [Help] 20 characters
  Enter the master list number for which you would like to display all associated bidders.

- Bidder: 50 characters
  Include the name of the bidder you would like to place on the first line of the display.

**Screen Information**

- ◮ Panel 1
  - Buyer: 30 characters
    Identifies the initials of the buyer responsible for the purchase of the selected commodities.
  - Comments: 30 characters
    Displays any additional comments about the list.
Screen 497 – Bidders for Master List (cont’d)

**Freeze:** 1 character
Indicates whether or not ("Y" or "N") the bid list has been restricted from further activity.

**Delete:** 1 character
Identifies whether or not ("Y" or "N") the bid list has been deleted from the system.

**Sel:** 1 character
Type “X” and press <ENTER> to select a bidder for further display on Screen 463.

**Bidder Name:** 22 characters
Shows the name of the bidder on the master list.

**HUB St:** 1 character
Indicates the bidder’s status: active HUB (A), a HUB on the CMBL (B), or not considered a HUB (N).

**Comm:** 10 digits
Identifies the number of the commodity for which the bidder will be submitting bids.

**Bid to Address:** 40 digits/characters
Displays the mailing address to which bid information will be sent.

**Panel 2**

**HUB:** 1 character
Indicates the HUB status of the bidder: active HUB (A), a HUB on the CMBL (B), or not considered a HUB (N).

**Phone:** 10 digits
Displays the area code and phone number of the selected bidder.

**Fax:** 10 digits
Shows the area code and phone number of FAX machine for the selected bidder.

**Panel 3**

**Eth Org:** 2 characters
Indicates the ethnic origin of the bidder. Examples:
BL = Black
AS = Asian
HI = Hispanic
AM = Am. Ind.
WO = Woman Owned

**Ge:** 1 character
Identifies the gender of the bidder’s business owner’s: male (M) or female (F).
Screen 497 – Bidders for Master List (cont’d)

**SB Fg:** 1 character
Indicates whether or not (“Y” or “N”) the bidder is considered a Small Business Fund Group.

**QI:** 1 character
Indicates whether or not (“Y” or “N”) the bidder is a Qualified Information Systems Vendor.

**Bid Cnt:** 7 digits
Indicates the number of bids the bidder has been added to in the current fiscal year.

**Resp Cnt:** 7 digits
Shows the number of bids the bidder has responded to in the current fiscal year.

**Bidder ID:** 13 characters/digits
Displays the bidder’s identification number and is prefixed by S (State) or L (local).

**Expiration Date:** 8 digits
Indicates the date the bidder will go off the CMBL if they do not renew their application.

**Additional Functions**

**PF KEYS**
See the Appendix for an explanation of the standard PF keys.
Specific List Browse

You may view specific bid lists on the system using **Screen 485**.

### Screen 485 - Specific List Browse

```
> Screen: ___ Specific List: B10

<table>
<thead>
<tr>
<th>Sel</th>
<th>List Name</th>
<th>Buy Bid Document</th>
<th>St Open Date</th>
<th>Open Time</th>
<th>Last Print</th>
</tr>
</thead>
<tbody>
<tr>
<td>-</td>
<td>AGC B100001</td>
<td></td>
<td>05/25/2010</td>
<td>02:00 PM</td>
<td></td>
</tr>
<tr>
<td>-</td>
<td>AGC B100002</td>
<td></td>
<td>06/11/2010</td>
<td>02:00 PM</td>
<td></td>
</tr>
<tr>
<td>-</td>
<td>AGC B100003</td>
<td></td>
<td>06/03/2010</td>
<td>02:00 PM</td>
<td></td>
</tr>
<tr>
<td>-</td>
<td>CKA B100004</td>
<td></td>
<td>06/03/2010</td>
<td>02:00 PM</td>
<td></td>
</tr>
<tr>
<td>-</td>
<td>CKA B100005</td>
<td></td>
<td>06/30/2010</td>
<td>02:00 PM</td>
<td></td>
</tr>
<tr>
<td>-</td>
<td>CKA B100006</td>
<td></td>
<td>06/03/2010</td>
<td>02:00 PM</td>
<td></td>
</tr>
<tr>
<td>-</td>
<td>CKA B100007</td>
<td></td>
<td>06/03/2010</td>
<td>02:00 PM</td>
<td></td>
</tr>
<tr>
<td>-</td>
<td>CKA B100008</td>
<td></td>
<td>06/09/2010</td>
<td>02:00 PM</td>
<td></td>
</tr>
<tr>
<td>-</td>
<td>TMS B100009</td>
<td></td>
<td>06/25/2010</td>
<td>02:00 PM</td>
<td></td>
</tr>
<tr>
<td>-</td>
<td>AGC B100010</td>
<td></td>
<td>08/09/2010</td>
<td>02:00 PM</td>
<td></td>
</tr>
<tr>
<td>-</td>
<td>CKA B100011</td>
<td></td>
<td>06/17/2010</td>
<td>02:00 PM</td>
<td></td>
</tr>
<tr>
<td>-</td>
<td>RKW B100012</td>
<td></td>
<td>06/22/2010</td>
<td>02:00 PM</td>
<td></td>
</tr>
</tbody>
</table>

More Entries - Press <ENTER> to Continue
```

Place the cursor on a List Name item and press **PF10** key to view the commodities associated with the bid list.

### PF10 COMM – Commodity Pop-Up Window

```
<table>
<thead>
<tr>
<th>Commodity</th>
<th>Commodity Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>92675</td>
<td>RADIATION DOSIMETER SERVICES</td>
</tr>
<tr>
<td>898</td>
<td>X-RAY AND OTHER RADIOLOGICAL E</td>
</tr>
</tbody>
</table>

**** End of Commodities **
```

### Basic Steps

- If desired, type a number (or partial number) in the **Specific List** field.
- Press <ENTER> to display all lists on the system, beginning with the list specified on the Action Line.
- Type “X” next to a bid list and press <ENTER> to advance to **Screen 498** where a list of all of the bidders for the list will be displayed.
- Place your cursor on the line with one of the bid lists and press **PF10** to display all of the commodity codes associated with a particular list.
Field Descriptions (◆ = Required;   = Field Help Available Using PF2, ?, or *)

**Action Line**
Specific List: 20 characters/digits
Type a specific bid list number to place it on the first line of the display.

**Screen Information**
Sel: 1 character
Type “X” and press <ENTER> to select a bid list for further display on Screen 498.

List Name: 20 characters/digits
Displays the name of the bid list.

Buy: 3 characters
Shows the initials of the buyer responsible for the purchase of the commodities.

Bid Document: 7 character/digits
Displays the purchasing bid document number associated with the bid list.

St: 1 character
Indicates the status of the bid list: frozen (F) or deleted (D) from further activity.

Open Date: 8 digits
Signifies the date that the document was opened for accepting bids.

Open Time: 4 digits
Indicates the time of day that the document was opened for accepting bids.

Last Print: 8 digits
Displays the date on which the bid was last printed.

**Additional Functions**
PF KEYS
See the Appendix for an explanation of the standard PF keys.

PF10 COMM
List Commodities
Used to display a list of all commodities associated with a specified bid list.
Display Specific Lists by Open Date and Time

You may view a list of all specific bid lists opening at a particular time and date using Screen 486.

Screen 486 - Specific List Browse by Date/Time

<table>
<thead>
<tr>
<th>Sel</th>
<th>List Name</th>
<th>Open Date</th>
<th>Open Time</th>
<th>Buy</th>
<th>Bid Document</th>
<th>St</th>
<th>Last Print</th>
</tr>
</thead>
<tbody>
<tr>
<td>___</td>
<td>B700330</td>
<td>01/18/2007</td>
<td>02:00 PM</td>
<td>PMA</td>
<td>B700330</td>
<td></td>
<td></td>
</tr>
<tr>
<td>___</td>
<td>B700341</td>
<td>01/18/2007</td>
<td>02:00 PM</td>
<td>TMS</td>
<td>B700341</td>
<td></td>
<td></td>
</tr>
<tr>
<td>___</td>
<td>B700343</td>
<td>01/18/2007</td>
<td>02:00 PM</td>
<td>CKA</td>
<td>B700343</td>
<td></td>
<td></td>
</tr>
<tr>
<td>___</td>
<td>B700336</td>
<td>01/19/2007</td>
<td>02:00 PM</td>
<td>PMA</td>
<td>B700336</td>
<td></td>
<td></td>
</tr>
<tr>
<td>___</td>
<td>B700338</td>
<td>01/19/2007</td>
<td>02:00 PM</td>
<td>PMA</td>
<td>B700338</td>
<td></td>
<td></td>
</tr>
<tr>
<td>___</td>
<td>B700324</td>
<td>01/22/2007</td>
<td>02:00 PM</td>
<td>PKP</td>
<td>B700324</td>
<td></td>
<td></td>
</tr>
<tr>
<td>___</td>
<td>B700346</td>
<td>01/23/2007</td>
<td>02:00 PM</td>
<td>JRE</td>
<td>B700346</td>
<td></td>
<td></td>
</tr>
<tr>
<td>___</td>
<td>B700327</td>
<td>01/24/2007</td>
<td>02:00 PM</td>
<td>JRE</td>
<td>B700327</td>
<td></td>
<td></td>
</tr>
<tr>
<td>___</td>
<td>B700337</td>
<td>01/24/2007</td>
<td>02:00 PM</td>
<td>TMS</td>
<td>B700337</td>
<td></td>
<td></td>
</tr>
<tr>
<td>___</td>
<td>B700347</td>
<td>01/25/2007</td>
<td>02:00 PM</td>
<td>JRE</td>
<td>B700347</td>
<td></td>
<td></td>
</tr>
<tr>
<td>___</td>
<td>B700349</td>
<td>01/25/2007</td>
<td>02:00 PM</td>
<td>PKP</td>
<td>B700349</td>
<td></td>
<td></td>
</tr>
<tr>
<td>___</td>
<td>B700342</td>
<td>01/26/2007</td>
<td>02:00 PM</td>
<td>PKP</td>
<td>B700342</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

More Entries - Press <ENTER> to Continue

Enter--PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
Hmenu Help EHelp COMM

Place the cursor on a List Name item and press PF10 key to view the commodities associated with the bid list.

Basic Steps

- Type a open date and time in the fields provided.
- Press <ENTER> to display a list of all specific lists on the system, beginning with the lists that opened on the specified date/time.
- Type an “X” next to a bid list and press <ENTER> to advance to Screen 498.
- Place your cursor on the line with one of the bid lists and press PF10 to display a list of commodity codes associated with a particular list.
Screen 486 – Specific List Browse by Date/Time (cont’d)

Field Descriptions *(◆ = Required; Help = Field Help Available Using PF2, ?, or *)

**Action Line**

◆ Open Date: 8 digits
Type the opening date of the bid list to be displayed on the first line.

◆ Open Time: 6 digits/characters
Include the opening time of the bid list to be displayed on the first line.

**Screen Information**

Sel: 1 character
Type “X” and press <ENTER> to select the bid list for further display on Screen 498.

List Name: 20 characters/digits
Displays the bid list name.

Open Date: 8 digits
Signifies the date that the document was opened for accepting bids.

Open Time: 4 digits
Indicates the time of day that the document was opened for accepting bids.

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

Bid Document: 7 characters/digits
Shows the purchasing bid document number associated with the bid list.

St: 1 character
Indicates the status of the bid list: frozen (F) or deleted (D) from further activity.

Last Print: 8 digits
Displays the date on which the bid was last printed.

**Additional Functions**

PF KEYS
See the Appendix for an explanation of the standard PF keys.

PF10 COMM
List Commodities
Used to display a list of all commodities associated with a specified bid list.
Display Specific Lists by Buyer/Date/Time

You may view a list of all specific bid lists opening at a particular time and date using Screen 487. You may also view specific bid lists for a buyer.

To view all commodities associated with a bid list, press PF10.

Screen 487 - Specific List Browse by Buyer/Date/Time

Basic Steps

- Type a open date and time in the fields provided.
- If desired, type the initials of a buyer in the Buyer field. Bid lists associated with this buyer will be displayed on the first informational line of the display.
- Press <ENTER> to display a list of all specific lists on the system, beginning with the lists that opened on the specified date/time.
- Type an “X” next to a bid list and press <ENTER> to advance to Screen 498.
- Place your cursor on the line with one of the bid lists and press PF10 to display a list of commodity codes associated the bid list.
Screen 487 – Specific List Browse by Buyer/Date/Time (cont’d)

Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ?, or *)

**Action Line**

Buyer: 3 characters
Type the initials of the buyer to view a list of associated specific lists.

◆ Open Date: 8 digits
Enter the opening date of the bid lists you would like to display.

◆ Open Time: 6 digits/characters
Include the opening time of the bid lists you would like to display.

**Screen Information**

Sel: 1 character
Type “X” and press <ENTER> to select the bid list for further display on Screen 498.

List Name: 20 characters/digits
Displays the bid list name.

Buy: 3 characters
Shows the initials of the buyer responsible for the purchase of the commodities.

Open Date: 8 digits
Signifies the date that the document was opened for accepting bids.

Open Time: 6 digits/characters
Indicates the time of day that the document was opened for accepting bids.

Bid Document: 7 character/digits
Displays the purchasing bid document associated with the bid list.

St: 1 character
Indicates the bid list status: frozen (F) or deleted (D) from further activity.

Last Print: 8 digits
Displays the date on which the bid was last printed.

**Additional Functions**

PF KEYS
See the Appendix for an explanation of the standard PF keys.

PF10 COMM
List Commodities
Used to display a list of all commodities associated with a specified bid list.
Specific Lists by Commodity/Date/Time

You may view a list of all specific bid lists for a particular commodity that open at a particular time and date using Screen 488.

To view all commodities associated with a bid list, press **PF10**.

**Screen 488 - Specific List Browse by Comm/Date/Time**

<table>
<thead>
<tr>
<th>Sel</th>
<th>List Name</th>
<th>Open Date</th>
<th>Open Time</th>
<th>Buy</th>
<th>Bid Document</th>
<th>St</th>
<th>Last Print</th>
</tr>
</thead>
<tbody>
<tr>
<td>7</td>
<td>B700788</td>
<td>09/21/2007</td>
<td>02:00 PM</td>
<td>PMA</td>
<td>B700788</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>B700413</td>
<td>02/26/2007</td>
<td>02:00 PM</td>
<td>MEY</td>
<td>B700413</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>B500181</td>
<td>10/06/2009</td>
<td>02:00 PM</td>
<td>JRZ</td>
<td>B500181</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>B400746</td>
<td>07/14/2004</td>
<td>02:00 PM</td>
<td>DJM</td>
<td>B400746</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>B500328</td>
<td>12/10/2004</td>
<td>02:00 PM</td>
<td>DJM</td>
<td>B500328</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>B900495</td>
<td>06/22/2009</td>
<td>02:00 PM</td>
<td>JRZ</td>
<td>B900495</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>B900181</td>
<td>10/06/2009</td>
<td>02:00 PM</td>
<td>JRZ</td>
<td>B900181</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>B900556</td>
<td>07/13/2009</td>
<td>02:00 PM</td>
<td>PAW</td>
<td>B900556</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>B000230</td>
<td>10/27/2009</td>
<td>02:00 PM</td>
<td>PAW</td>
<td>B000230</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>B700262</td>
<td>11/27/2006</td>
<td>02:00 PM</td>
<td>JRZ</td>
<td>B700262</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>B100077</td>
<td>01/09/2007</td>
<td>02:00 PM</td>
<td>JRZ</td>
<td>B100077</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>B700077</td>
<td>10/24/2006</td>
<td>02:00 PM</td>
<td>COO</td>
<td>B700077</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

More Entries - Press <ENTER> to Continue

Basic Steps

- Type a open date and time in the fields provided.
- If desired, type a commodity code in the **Commodity** field. Bid lists associated with this commodity will be displayed on the first informational line of the display.
- Press <ENTER> to display a list of all specific lists on the system, beginning with the lists that opened on the specified date/time.
- Type an “X” next to a bid list and press <ENTER> to advance to Screen 498.
- Place your cursor on the line with one of the bid lists and press **PF10** to display a list of commodity codes associated with a bid list.

**PF10 Commodity Pop-Up Window**

+-----------------------------------+
| Commodity                        |
| Insulation and Asbestos Install   |
| Prefomed Insulation, All Type    |

**** End of Commodities **

PP4 = Exit
Screen 488 – Specific List Browse by Commodity/Date/Time (cont’d)

Field Descriptions (◆ = Required; ✉ = Field Help Available Using PF2, ?, or *)

**Action Line**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
</table>
| Commodity:     | **Help** 20 digits  
Enter the commodity number for the specific bid list to be displayed. |
| ◆ Open Date:   | 8 digits  
Type the opening date of the bid lists you would like to display first. |
| ◆ Open Time:   | 6 digits/characters  
Type the opening time of the bid lists you would like to display first. |

**Screen Information**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
</table>
| Sel:           | 1 character  
Type “X” and press <ENTER> to select the bid list for further display on Screen 498. |
| List Name:     | 20 characters/digits  
Displays the name of a specific bid list. |
| Open Date:     | 8 digits  
Signifies the date that the document was opened for accepting bids. |
| Open Time:     | 4 digits  
Indicates the time of day that the document was opened for accepting bids. |
| Buy:           | 3 characters  
Displays the initials of the buyer responsible for the purchase of the commodities. |
| Bid Document:  | 7 character/digits  
Indicates the purchasing bid document number associated with the bid list. |
| St:            | 1 character  
Indicates the status of the specific list: frozen (F) or deleted (D) from further activity. |
| Last Print:    | 8 digits  
Displays the date on which the bid was last printed. |

**Additional Functions**

**PF KEYS**

See the Appendix for an explanation of the standard PF keys.

**PF10 COMM**

List Commodities  
Used to display a list of all commodities associated with a specified bid list.
Display Bidders for a Specific List

You may display a list of all bidders associated with a specific list using Screen 498. To position the page to a specific bidder, type the bidder’s name in the Bidder field.

On this screen you may see that there can be multiple commodities on a specific bid list.

**Screen 498 – Specific List Bidders (Panel 1)**

<table>
<thead>
<tr>
<th>Bidder Name</th>
<th>St</th>
<th>Comm</th>
<th>Bid to Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASP SCIENTIFIC</td>
<td>A</td>
<td>17513</td>
<td>2000 S. SHOAR GROVE</td>
</tr>
<tr>
<td>BURLE COMPANY DBA</td>
<td>A</td>
<td>17513</td>
<td>P O BOX 1111</td>
</tr>
<tr>
<td>BBB SCIENCE, BBB</td>
<td>A</td>
<td>17513</td>
<td>4444 RESEARCH DR</td>
</tr>
<tr>
<td>FFX SCIENTIFIC INC</td>
<td>A</td>
<td>17513</td>
<td>10000 ROCKS ROAD</td>
</tr>
<tr>
<td>EXPOSURE USA INC</td>
<td>A</td>
<td>17513</td>
<td>8881 EAST FM 999</td>
</tr>
</tbody>
</table>

**Screen 498 – Specific List Bidders (Panel 2)**

<table>
<thead>
<tr>
<th>Bidder Name</th>
<th>HUB</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASP SCIENTIFIC</td>
<td>A 713-888-1105</td>
<td>281-333-6396</td>
</tr>
<tr>
<td>BURLE COMPANY DBA</td>
<td>A 409-777-1900</td>
<td>409-777-1899</td>
</tr>
<tr>
<td>BBB SCIENCE, BBB</td>
<td>210-333-0032</td>
<td>210-333-6745</td>
</tr>
<tr>
<td>FFX SCIENTIFIC INC</td>
<td>A 817-777-7500</td>
<td>817-888-3571</td>
</tr>
</tbody>
</table>
### Screen 498 - Specific List Bidders (Panel 3)

<table>
<thead>
<tr>
<th>Sel</th>
<th>Bidder Name</th>
<th>Org</th>
<th>Ge</th>
<th>Fg</th>
<th>QI</th>
<th>Cnt</th>
<th>Cnt</th>
<th>Bidder ID</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>_</td>
<td>ASP SCIENTIFIC</td>
<td>AS</td>
<td>F</td>
<td></td>
<td>N</td>
<td></td>
<td></td>
<td>S17xxxxxxxxxx00</td>
<td>11/06/2011</td>
</tr>
<tr>
<td>_</td>
<td>BURLE COMPANY DBA BCE WO</td>
<td>F</td>
<td>Y</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>S12xxxxxxxxxx00</td>
<td>05/28/2012</td>
</tr>
<tr>
<td>_</td>
<td>BBB SCIENTIFIC, BVA S WO</td>
<td>F</td>
<td>Y</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>S17xxxxxxxxxxAA</td>
<td></td>
</tr>
<tr>
<td>_</td>
<td>EXPOSURE USA INC</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>S17xxxxxxxxxx00</td>
<td>09/28/2014</td>
</tr>
<tr>
<td>_</td>
<td>FFX SCIENTIFIC INC</td>
<td>HI</td>
<td>M</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>S17xxxxxxxxxx00</td>
<td>12/18/2012</td>
</tr>
</tbody>
</table>

### Basic Steps

- Type a specific list name in the **List** field.
- If desired, type a bidder’s name in the **Bidder** field.
- Press <ENTER> to display a list of all bidders associated with the list, beginning with the bidder specified on the Action Line.
- Type an “X” next to a bidder and press <ENTER> to advance to Screen 463 where a more detailed description of the bidder will be displayed.

### Field Descriptions (**= Required; Help = Field Help Available Using PF2, ?, or *)

**Action Line**

- **List:** 20 characters/digits
  - Type the number of the specific list to view associated bidders.

- **Bidder:** 50 characters
  - Enter the name of the bidder to be displayed on the first line.

**Screen Information**

- **Panel 1**
  - **Buyer:** 3 characters
    - Displays the initials of the buyer responsible for the purchase of the selected commodities.
  - **Comments:** 30 characters
    - Displays any comments about the bid list.
  - **Date:** 8 digits
    - Shows the date that the document was opened for accepting bids.
Screen 498 – Bidders for Specific List (cont’d)

<table>
<thead>
<tr>
<th>Field</th>
<th>Data Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time</td>
<td>6 digits/characters</td>
<td>Indicates the time of day that the document was opened for accepting bids.</td>
</tr>
<tr>
<td>Freeze</td>
<td>1 character</td>
<td>Indicates whether or not (“Y” or “N”) the bid list has been frozen and restricted from further activity.</td>
</tr>
<tr>
<td>Delete</td>
<td>1 character</td>
<td>Identifies whether or not (“Y” or “N”) the bid list has been deleted from the system.</td>
</tr>
<tr>
<td>S</td>
<td>1 character</td>
<td>Type “X” and press &lt;ENTER&gt; to select a bidder for further display on Screen 463.</td>
</tr>
<tr>
<td>Bidder Name</td>
<td>22 characters</td>
<td>Shows the name of the person/business from which bids will be accepted.</td>
</tr>
<tr>
<td>HUB St</td>
<td>1 character</td>
<td>Indicates the HUB status of the bidder: active HUB (A), a HUB on the CMBL (B), or not considered a HUB (N).</td>
</tr>
<tr>
<td>Comm</td>
<td>10 digits</td>
<td>Identifies the commodity code for which the bidder will be submitting bids.</td>
</tr>
<tr>
<td>Bid to Address</td>
<td>40 digits/characters</td>
<td>Displays the mailing address to which bid information will be sent.</td>
</tr>
</tbody>
</table>

**Panel 2**

<table>
<thead>
<tr>
<th>Field</th>
<th>Data Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hub</td>
<td>1 character</td>
<td>Indicates the HUB status of the bidder: active HUB (A), a HUB on the CMBL (B), or not considered a HUB (N).</td>
</tr>
<tr>
<td>Phone</td>
<td>10 digits</td>
<td>Identifies the area code and phone number of the selected bidder.</td>
</tr>
<tr>
<td>Fax</td>
<td>10 digits</td>
<td>Identifies the area code and phone number of FAX machine for the selected bidder.</td>
</tr>
</tbody>
</table>

**Panel 3**

<table>
<thead>
<tr>
<th>Field</th>
<th>Data Type</th>
<th>Description</th>
</tr>
</thead>
</table>
| Eth Org      | 2 characters | Indicates the ethnic origin of the bidder.  
BL = Black  
AS = Asian  
HI = Hispanic  
AM = American Indian  
WO = Woman Owned |
| Ge           | 1 digit   | Identifies the gender of the bidder’s business owner: male (M) or female (F). |
Screen 498 – Bidders for Specific List (cont’d)

**SB Fg:** 1 character
Indicates whether or not ("Y" or "N") the bidder is considered a small business fund group.

**QI:** 1 character
Shows whether or not ("Y" or "N") the bidder is a Qualified Information Systems Vendor.

**Bid Cnt:** 7 digits
Indicates the number of bids the bidder has been added to in the current fiscal year.

**Resp Cnt:** 7 digits
Identifies the number of bids the bidder has responded to in the current fiscal year.

**Bidder ID:** 13 characters/digits
Displays the bidder’s identification number and is prefixed by S (State) or L (local).

**Expiration Date:** 8 digits
Indicates the date the bidder will go off the CMBL if they do not renew their application.

**Additional Functions**

**PF KEYS**
See the Appendix for an explanation of the standard PF keys.
Create and Maintain Bidder Information

Bidder information is used when you build a bid list. You may use Screen 452 to create and maintain your local bidder information as well as to display State bidder information.

Bidders are created by two methods:

1. State bidders from the central master bid list are loaded into the FAMIS system from a file retrieved from the State’s General Services Commission computer system.

   State bidders may be viewed but not modified on this screen.

When a foreign bidder is created from the CMBL file, the city, state and zip are left blank. The city information is entered in the CMBL Foreign field. Local bidders from a foreign country will be entered using the city, state, ZIP code and country code, similar to the vendor file.

2. Create a local bidder using Screen 452. Only local bidder information may be added using this screen. Generally, local bidders are entered to augment the State CMBL bidders for local funds.

When creating a bid list, the system allows you to specify the type of funds (i.e. State or Local) to be used. Specifying the type of fund will determine which bidders are displayed for inclusion on the bid list.

Screen 452 - Bidder Create/Maintain

<table>
<thead>
<tr>
<th>452 Bidder Create/Maintain</th>
<th>11/10/10 16:12</th>
</tr>
</thead>
<tbody>
<tr>
<td>&gt; Screen: ___ Bidder: 1xxxxxxxxxxx0 Type of funds (S or L): S CMBL Bidders</td>
<td></td>
</tr>
<tr>
<td>Name: “MAID” TO ORDER</td>
<td></td>
</tr>
<tr>
<td>Address: 1333 BRYANT DRIVE</td>
<td></td>
</tr>
<tr>
<td>City: GAYLORD</td>
<td></td>
</tr>
<tr>
<td>County: DALLAS</td>
<td></td>
</tr>
<tr>
<td>State: TX</td>
<td></td>
</tr>
<tr>
<td>Zip: 75043</td>
<td></td>
</tr>
<tr>
<td>Gender: F  Ethnic: AS</td>
<td></td>
</tr>
<tr>
<td>Small Bus Fg: _  QISV: N</td>
<td></td>
</tr>
<tr>
<td>Texas Office: Y</td>
<td></td>
</tr>
<tr>
<td>Hub Status: A</td>
<td></td>
</tr>
<tr>
<td>Hub Expire Dt: 06/28/2014</td>
<td></td>
</tr>
<tr>
<td>Hub Cart: 80918</td>
<td></td>
</tr>
<tr>
<td>Hub Fg:</td>
<td></td>
</tr>
</tbody>
</table>

For local bidders, the information below the line marked “CMBL Information” will remain blank.

Use PF8 to copy State bidder to local bidder.
Basic Steps

Create a New Local Bidder
• Type a bidder identification number (standard FAMIS vendor ID pattern, followed by 3 zeros, see below for more details) in the Bidder field and press <ENTER>.
• Type the name, address, city, state, and ZIP code for the new bidder in the fields provided.
• Type additional information in the available fields, as desired.
• Press <ENTER> to add the bidder to the system.

Modify an Existing Local Bidder
• Type a bidder identification number in the Bidder field and press <ENTER> to display existing bidder information.
• Add or modify information in the available fields, as desired.
• Press <ENTER> to record the bidder information.

Display a State Bidder
• Type a bidder identification number in the Bidder field.
• If the bidder ID is not known, type its name, a portion of its name, or an asterisk (*) in the Bidder field and press <ENTER> to display a pop-up window that will allow you to search for a particular bidder record. When you have located the desired bidder, type an “X” next to its listing and press <ENTER> to return to Screen 452.
• Press <ENTER> to display existing bidder information.

Bidder Maintenance Process

Assign a Bidder Identification Number
The bidder identification number created by the CMBL is made up of several components. The first digit is used to indicate the type of ID to be created (this is similar to the State vendor ID). The next nine (9) digits are the Social Security Number (SSN) or Federal Identification Number (FID) of the bidder. The SSN/FID is followed by a one (1) digit State check number. And finally, the last two (2) digits/characters are used to display the bidder’s address code. When entering a new local bidder using Screen 452, you should enter zeros (0) for the State check number and mail code in order for FAMIS to automatically assign the next available alpha-mail code.

Bidder Search and Select
If the bidder number is not known, type the bidder's name, a portion of the name or an asterisk (*) in the Bidder field and press <ENTER> to access a pop-up window with a complete list of bidders and their identification numbers. Type an “X” next to the desired bidder and press <ENTER> to select the bidder and return to Screen 452. Press PF4 if you wish to return to Screen 452 without selecting a bidder.
Local bidders will not appear in the State list and State bidders will not appear in the local list unless the name has been added to both the local and the State lists.

**Screen 452 - Name Search Pop-Up Window (Panel 1)**

<table>
<thead>
<tr>
<th>Bidder Name</th>
<th>Bid to</th>
</tr>
</thead>
<tbody>
<tr>
<td>A.A. DERK CO</td>
<td>7777 CALLEY AVE NILES IL</td>
</tr>
<tr>
<td>A.C.E.R.</td>
<td>1420 W MASON DALLAS TX</td>
</tr>
<tr>
<td>A+ GLASS PRODUCTS</td>
<td>1919 HARRY HINES BRYAN TX</td>
</tr>
<tr>
<td>A+ GLASS PRODUCTS</td>
<td>754 N HARRY HINES N BRYAN TX</td>
</tr>
<tr>
<td>A+ SEPTIC SYSTEM INC</td>
<td>P O BOX 6666 BRYAN TX</td>
</tr>
<tr>
<td>A&amp;A TELE GROUP INC</td>
<td>PO BOX 11111 AUSTIN TX</td>
</tr>
<tr>
<td>A&amp;M ELECTRIC SUPPLY INC</td>
<td>6035 NORTHERN HOUSTON TX</td>
</tr>
<tr>
<td>A&amp;M ENGRAVING</td>
<td>108 S MISSION BRYAN TX</td>
</tr>
<tr>
<td>A&amp;M ROOF REPAIR</td>
<td>4520 KINGFORD BRYAN TX</td>
</tr>
<tr>
<td>A&amp;M TRAIN SERVICE</td>
<td>701 UNIVERSAL DR COLLEGE STA TX</td>
</tr>
<tr>
<td>A&amp;M TRAIN SERVICES INC</td>
<td>700 UNIVERSAL DR COLLEGE STA TX</td>
</tr>
<tr>
<td>A&amp;R REPROOFER INC</td>
<td>1820 W SAMPSON HOUSTON TX</td>
</tr>
</tbody>
</table>

**Screen 452 - Name Search Pop-Up Window (Panel 2)**

<table>
<thead>
<tr>
<th>Bidder Name</th>
<th>Bidder ID</th>
<th>Vendor ID Eth Ge St Expire Dt</th>
</tr>
</thead>
<tbody>
<tr>
<td>A.A. DERK CO</td>
<td>10xxxxxxxx0AA</td>
<td></td>
</tr>
<tr>
<td>A.C.E.R.</td>
<td>17xxxxxxxx0AA 1vvvvvvvvv0</td>
<td></td>
</tr>
<tr>
<td>A+ GLASS PRODUCTS</td>
<td>17xxxxxxxx0AA 1vvvvvvvvv0</td>
<td></td>
</tr>
<tr>
<td>A+ GLASS PRODUCTS</td>
<td>17xxxxxxxx0AB 1vvvvvvvvv0</td>
<td></td>
</tr>
<tr>
<td>A+ SEPTIC SYSTEM INC</td>
<td>10xxxxxxxx0AA 1vvvvvvvvv0</td>
<td></td>
</tr>
<tr>
<td>A&amp;A TELE GROUP INC</td>
<td>17xxxxxxxx0AA 1vvvvvvvvv0</td>
<td></td>
</tr>
<tr>
<td>A&amp;C PLASTER PRODUCTS INC</td>
<td>17xxxxxxxx0AA 1vvvvvvvvv0 F</td>
<td></td>
</tr>
<tr>
<td>A&amp;M ELECTRIC SUPPLY INC</td>
<td>13xxxxxxxx0AA 1vvvvvvvvv0 AS U</td>
<td></td>
</tr>
<tr>
<td>A&amp;M ENGRAVING</td>
<td>24xxxxxxxx0AB 2vvvvvvvvv1</td>
<td></td>
</tr>
<tr>
<td>A&amp;M ROOF REPAIR</td>
<td>17xxxxxxxx0AA 1vvvvvvvvv0</td>
<td></td>
</tr>
<tr>
<td>A&amp;M TRAIN SERVICE</td>
<td>24xxxxxxxx0AA 2vvvvvvvvv1</td>
<td></td>
</tr>
<tr>
<td>A&amp;M TRAIN SERVICES INC</td>
<td>17xxxxxxxx0AA 1vvvvvvvvv0</td>
<td></td>
</tr>
<tr>
<td>A&amp;R REPROOFER INC</td>
<td>17xxxxxxxx8AA 1vvvvvvvvv0 WO F</td>
<td></td>
</tr>
</tbody>
</table>

**Field Descriptions**

- **Action Line**
  - **Bidder:** 13 digits
    - Enter the desired bidder’s identification number.
  - **Type of funds** (S or L):
    - 1 character
    - Indicate the type of funds to be displayed: State (S) or local (L) bidder information.
### Screen Information

<table>
<thead>
<tr>
<th>Field</th>
<th>Character Limit</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>40 characters</td>
<td>Enter the name of the bidder to be added, modified, or displayed.</td>
</tr>
<tr>
<td>Address</td>
<td>40 digits/characters per line</td>
<td>Indicate the street address to which bid information will be sent.</td>
</tr>
<tr>
<td>City</td>
<td>40 characters</td>
<td>Include the city to which bid information will be mailed.</td>
</tr>
<tr>
<td>State</td>
<td>2 characters</td>
<td>Identify the state to which bid information will be mailed.</td>
</tr>
<tr>
<td>Zip</td>
<td>10 digits</td>
<td>Type the Zip Code to which bid information will be mailed.</td>
</tr>
<tr>
<td>Country</td>
<td>3 characters</td>
<td>Indicate the country to which bid information will be mailed.</td>
</tr>
<tr>
<td>or CMBL Foreign</td>
<td>40 digits/characters</td>
<td>Identify the address for the bidder, if it is a foreign bidder.</td>
</tr>
<tr>
<td>County</td>
<td>40 characters</td>
<td>Signify the county in which the bidder is located.</td>
</tr>
<tr>
<td>Contact</td>
<td>50 characters</td>
<td>Indicate the name of the CMBL contact person for the selected bidder.</td>
</tr>
<tr>
<td>Phone</td>
<td>10 digits</td>
<td>Supply the area code and phone number used to access the bidder.</td>
</tr>
<tr>
<td>Fax</td>
<td>10 digits</td>
<td>Identify the area code and phone number of the bidder’s Fax.</td>
</tr>
<tr>
<td>Internet</td>
<td>50 characters/digits</td>
<td>Provide the email (Internet electronic mail) address of the selected bidder.</td>
</tr>
<tr>
<td>Gender</td>
<td>1 character</td>
<td>Indicate the gender of the bidder: female (F) or male (M).</td>
</tr>
<tr>
<td>Ethnic</td>
<td>2 characters</td>
<td>Signify the ethnic origin of the selected bidder.</td>
</tr>
<tr>
<td>Small Bus Fg</td>
<td>1 character</td>
<td>Indicate whether or not the bidder is classified as a small business.</td>
</tr>
<tr>
<td>QISV</td>
<td>1 character</td>
<td>Indicates whether or not (&quot;Y&quot; or &quot;N&quot;) the bidder is a Qualified Information System Vendor.</td>
</tr>
</tbody>
</table>
Screen 452 – Bidder Create/Maintain (cont’d)

**Texas Office:**

1 character
Identify whether or not ("Y" or "N") the bidder has a Texas office location.

**CMBL Information**

**Hub Status:**

1 character
Indicates the HUB status of the bidder: active HUB (A), a HUB on the CMBL (B), or not considered a HUB (N).

**Hub Expire Date:**

8 digits
If the bidder is a HUB vendor, this indicates the date on which its HUB status expires. *If not, it identifies the date on which it will be removed from the system.*

**Hub Cert:**

6 digits
Displays the HUB certification number for the specified bidder.

**Hub Fg:**

1 character
Identifies the HUB Fund group.

**Additional Functions**

**PF KEYS**

See the Appendix for an explanation of the standard PF keys.

**PF5**

**BDesc**

*Business Description*
Used to enter a detailed business description of the selected bidder.

**PF6**

**Audit**
Provides details about the status of a bidder.

**PF8**

**Copy**
Copies State bidder file into a local bidder file.
Relate Local Bidders with Commodities

In order to be used on a bid list, local bidders must be associated with their goods and services within the FAMIS system. Screen 453 is used to relate the commodities provided to their respective local bidders.

This screen allows you to add multiple commodities at any given time.

### Screen 453 - Bidder with Multiple Commodities

<table>
<thead>
<tr>
<th>F</th>
<th>Commodity</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>015-06</td>
<td>ADDRESSING MACHINE SUPPLIES, METAL AND PLASTIC PLA</td>
<td></td>
</tr>
<tr>
<td>015-10</td>
<td>ADDRESSING MACHINE SUPPLIES, PAPER PLATE TYPE</td>
<td></td>
</tr>
<tr>
<td>015-15</td>
<td>CHEMICALS AND SUPPLIES, DRY (FOR BOND PAPER TYPE C</td>
<td></td>
</tr>
<tr>
<td>015-16</td>
<td>CHEMICALS AND SUPPLIES, WET (FOR BOND PAPER TYPE C</td>
<td></td>
</tr>
<tr>
<td>015-20</td>
<td>CHEMICALS AND SUPPLIES (FOR SPIRIT TYPE DUPLICATI</td>
<td></td>
</tr>
<tr>
<td>015-25</td>
<td>CHEMICALS, INKS, AND SUPPLIES (FOR MIMEOGRAPH MACH</td>
<td></td>
</tr>
<tr>
<td>015-39</td>
<td>PAPER, CHEMICALS, AND SUPPLIES (FOR COATED OR TREA</td>
<td></td>
</tr>
<tr>
<td>015-45</td>
<td>PAPER, CHEMICALS, AND SUPPLIES (FOR DIFFUSION TRAN</td>
<td></td>
</tr>
<tr>
<td>015-55</td>
<td>PAPER AND SUPPLIES (FOR DUAL SPECTRUM PROCESS COPY</td>
<td></td>
</tr>
<tr>
<td>015-70</td>
<td>PAPER, CHEMICALS, AND SUPPLIES (FOR THERMAL PROCE</td>
<td></td>
</tr>
<tr>
<td>015-90</td>
<td>TRANSPARENCIES (FOR USE WITH TRANSPARENCY MAKERS A</td>
<td></td>
</tr>
<tr>
<td>015-99</td>
<td>COMMODITIES NOT OTHERWISE CLASSIFIED</td>
<td></td>
</tr>
<tr>
<td>880-88</td>
<td>TRANSPARENCIES (SEE CLASS 715 FOR PREPARED MATERIA</td>
<td></td>
</tr>
</tbody>
</table>

Basic Steps

- Type a local bidder identification number in the Bidder field.
- Press <ENTER> to display a list of existing commodities associated with the selected bidder.
- Type a function code in the "F" column: Add a new commodity to the list; Delete a current commodity from the list; or Position a commodity at the top of the list.
- If adding a new commodity to the list, type the new commodity code.
- Press <ENTER> to record the information.

Local Bidder Association Process

**Add Multiple Commodities to a Local Bidder**

To add multiple commodities to a local bidder, you should type an “A” in the F (Function) field. Next, <TAB> to the Commodity field and type a commodity code, or a partial name of a commodity surrounded by asterisks (*), as shown below.
This will provide a pop-up window beginning with the commodity code entered on Screen 453. Type an “X” next to as many as 51 commodities you would like to associate with the bidder. To exit the pop-up window press **PF4**.

If you attempt to add more than 51 commodities to the list, the program will add as many commodities to the list as it is capable (51) and will exit the pop-up window. A message will appear above the Action Line telling you the last commodity code that was added to the bidder’s list.
Screen 453 – Bidders with Multiple Commodities (cont’d)

Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ?, or *)

Action Line
◆ Bidder: 15 digits
Enter the local bidder’s identification number for whom you wish to add, delete, or position selected commodities.

Screen Information
◆ F: Help 1 character
Identify the function to perform.
A = Add a new commodity
D = Delete a commodity
P = Position the selected commodity the top of the display screen.

◆ Commodity: Help 15 digits
Indicate the commodity code for the goods/services you would like to associate with the selected local bidder.

Name: 50 characters
Displays the name of the commodity.

Additional Functions
PF KEYS See the Appendix for an explanation of the standard PF keys.
Bidder Flag Maintenance

You can freeze or delete bidders using Screen 454. If you request a bidder to be deleted and there are no commodities associated with that bidder it will be completely deleted. If you request a bidder to be deleted that has commodities or has been put on a bid list, it will be flagged as deleted.

 Deleted and frozen bidders will not appear on the name searches.

Screen 454 - Bidder Flag Maintenance

Basic Steps

- Type the number of the desired bidder in the **Bidder** field. You may also type an asterisk (*) to select a bidder from a pop-up window list.
- Press <ENTER> to access the current bidder flag settings.
- Type “Y” (yes) or “N” (no) as desired and press <ENTER>. A pop-up window will be displayed to provide a reason for the Freeze or Delete flag. Press <ENTER> to record bidder flag changes.

Field Descriptions  (** = Required;  **Help** = Field Help Available Using PF2, ? or *)

**Action Line**

- **Bidder:** 13 digits
  Type in the desired bidder identification number to display flag information.
Screen 454 – Bidder Flag Maintenance (cont’d)

**Screen Information**

**Bidder Flags**

FREEZE Bidder: 1 character
Indicate whether or not ("Y" or "N") to freeze the bidder.

DELETE this Bidder: 1 character
Indicate whether or not ("Y" or "N") you would like to delete the bidder.

Comment: 30 characters
Shows comments describing the reason a flag was changed.

**Freeze Info**

Operator: 6 digits/characters
Displays the FAMIS UserID of the last person to update the freeze bidder flag.

Date: 8 digits
Displays the date on which the freeze bidder flag was last updated.

**Delete Info**

Operator: 6 digits/characters
Displays the FAMIS UserID of the last person to update the delete bidder flag.

Date: 8 digits
Displays the date on which the delete bidder flag was last updated.

**Additional Functions**

PF KEYS
See the Appendix for an explanation of the standard PF keys.

PF12 Warnings
Displays any FAMIS warnings.
Copy State Bidder Commodities

Screen 455 can be used to copy commodities from a State bidder to a Local bidder. After the From Bidder and To Bidder fields have been filled in, a list of commodities for the State bidder will be displayed.

Select individual commodities from those listed by typing an “X” in the Sel (Select) field, or copy all the commodities by pressing PF6.

Copy State Bidder Commodities Process

Type the name of a bidder or bidder's identification number and press <ENTER>. You may also type a sequence of numbers to view all bidders that have identification numbers that are similar.

For example, if you know a bidder's ID number begins with “17” but do not know the remaining numbers, you can type this information in the From Bidder or To Bidder fields, change the Type to “B” and press <ENTER> to get a list of all bidders with ID numbers that begin with the numbers specified.

You may also type an asterisk (*) to view a list of all vendors, or type a partial bidder's name to view bidders that match the information entered in these fields.

Basic Steps

- Type a bidder's identification number in the From Bidder field and in the To Bidder field and press <ENTER> to view a list of commodities to be copied.
- Type an “X” in the Sel (Select) field to select the commodities to be copied, or press PF6 to copy all commodities displayed.
Screen 455 – Copy State Bidder Commodities (cont’d)

Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ?, or *)

Action Line
◆ From Bidder: Help 13 digits
Enter a bidder's identification number to copy commodities from.

◆ To Bidder: Help 13 digits
Type a bidder's identification number to copy commodities to.

Screen Information
◆ Sel: 1 character
Type “X” and press <ENTER> to select the commodity to be copied.

Commodity: 10 digits
Identifies the commodity code assigned to the commodity.

Commodity Name: 30 characters
Displays the name of the commodity.

Additional Functions
PF KEYS
See the Appendix for an explanation of the standard PF keys.

PF6 All
All
Used to select and copy all commodities displayed.
Copy a FAMIS Vendor to the Bidder File

There are several methods by which you can add a vendor to your local bidder list. One method is to manually enter the information on Screen 452. However, if the vendor has already been entered as a FAMIS vendor, you can copy their information from the vendor list to the bidder file using Screen 456.

**Screen 456 - Copy Vendor to Bidder (Panel 1)**

```
456 Copy Vendor to Bidder                                      11/18/10 14:54
> Screen: ___  Vendor: 1vvvvvvvvv0              4530 WEST STREET
>       Bidder Search: ____________________     HOUSTON               TX
>           Type(N,I): N                                          77092
PANEL: 01 MORE>>
Copy to Bidder File: N  (Enter a 'Y' to copy a vendor to local bidder file)
* --------------------------------- Bidders --------------------------------- *
S             Name                   Address Line          City     St
_ BIOS CONVEYOR SYSTEMS          6666 MILLS DR        MISSISSAUGA O XX LSN 2
_ COMMERCES HYDRA COOLER         TIMBER PARK DRIVE WARWICK XX
_ TRUMPS SOFTWARE                GPO BOX 1111         HOUSTON TX 7001
_ NORTHWESTER GRAPHICS           444 ALVIN STREET      WATERLOO ONTA 2N3L5V
_ SOIL MECHANISM INSTRUMENTATION PO BOX 9005          STIRLING SOUT XX 5152
_ PHILS INTERNATIONAL INDUSTRIAL LONNIE SCHOOL OF ECO LONDON XX WC2A2
_ BULGAR ACADEMICS CENTER CENTER OF INFORMATIO BULGARIA XX
_ NATIONAL OPTICALS              333 FRANKLIN STREET CANADA 1G1P 4

** More Bidders - Press <ENTER> to view **
```

**Screen 456 - Copy Vendor to Bidder (Panel 2)**

```
456 Copy Vendor to Bidder                                      01/17/07 14:54
> Screen: ___  Vendor: 1vvvvvvvvv0              4530 W 34TH STREET STE J
>       Bidder Search: ____________________     HOUSTON               TX
>           Type(N,I): N                                          77092
<MORE PANEL: 02
Copy to Bidder File: N  (Enter a 'Y' to copy a vendor to local bidder file)
* --------------------------------- Bidders --------------------------------- *
S             Name                    ID          Vndr ID     Gdr  Code
_ BIOS CONVEYOR SYSTEMS LIMIT     TvvvvvvvvvAA  Tvvvvvvvvv0
_ COMMERCES HYDRA COOLER         TvvvvvvvvvVA  Tvvvvvvvvv0
_ TRUMPS SOFTWARE                TvvvvvvvvvVA  Tvvvvvvvvv0
_ NORTHWESTER DIGITAL             TvvvvvvvvvVA  Tvvvvvvvvv0
_ SOIL MECHANISM INSTRUMENTATION TvvvvvvvvvVA  Tvvvvvvvvv0
_ PHILS INTERNATIONAL INDUSTRIAL TvvvvvvvvvVA  Tvvvvvvvvv0
_ BULGAR ACADEMICS CENTER        TvvvvvvvvvVA  Tvvvvvvvvv0
_ NATIONAL OPTICALS              TvvvvvvvvvVA  Tvvvvvvvvv0

** More Bidders - Press <ENTER> to view **
```

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
Hmenu Help EHelp                                     Left  Right
Basic Steps

Copy a Vendor to the Bidder File

- Type a vendor identification number in the Vendor field and press <ENTER> to display all bidder information that exists for a particular SSN/FEI.
- Press PF11 to scroll to the second panel and view additional information. If a bidder ID is displayed (on Panel 2), the vendor has already been entered on the bidder file and does not need to be copied. If no information is displayed, or if the bidder ID is blank, this vendor does not exist on the bidder file and may be copied, if you wish.
- Enter "Y" in the Copy to Bidder File field and press <ENTER> to copy the vendor information to the bidder file.
- Type an "X" next to a bidder and press <ENTER> to advance to Screen 452 where additional information about the bidder may be entered on the system.

Search the Bidder File

- Type a vendor identification number in the Vendor field, or type the bidder's name (or portion of the name) to search for a specific bidder.
- Indicate whether you are searching by Name or bidder Identification number, and whether or not to include frozen or deleted vendors in the display.
- Press <ENTER> to display a list of local bidders that fit your search criteria.
- Type an “X” next to a bidder and press <ENTER> to advance to Screen 452.

Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

Action Line

◆ Vendor: [Help] 13 digits
   Enter the vendor’s identification number to be copied to the bidder file.

Bidder Search: 20 characters
   Specify the bidder’s name or portion of the name to search for a specific bidder.

Type (N, I): [Help] 1 character
   Indicate whether you wish to search by bidder identification number (I) or bidder name (N).

Copy to Bidder File: 1 character
   Type “Y” to copy the vendor to the bidder file.

Screen Information

[Panel 1]
S: 1 character
   Type “X” and press <ENTER> to select a vendor and advance to Screen 452 to view additional information.
Screen 456 – Copy Vendor to Bidder (cont’d)

Name: 30 characters
Shows the name of the selected bidder.

Address Line: 15 digits/characters
Displays the mailing address to which correspondence should be sent.

City: 10 characters
Displays the city to which correspondence should be mailed.

St: 2 characters, 5 digits
Displays the state code and the ZIP code to which correspondence should be mailed.

Panel 2
ID: 13 digits/characters
Displays the bidder’s ID number.

FAMIS Vndr ID: 13 digits
Displays the FAMIS Vendor ID number associated with the selected bidder.

Gdr: 1 character
Indicates the gender of the bidder: male (M) or female (F).

Ethnic Code: 2 characters
Indicates the ethnic origin of the bidder.

Additional Functions
PF KEYS
See the Appendix for an explanation of the standard PF keys.
Copy a Bidder to a FAMIS Vendor

Bidders are entered onto FAMIS either as a local bidder using Screen 452 or as a State bidder from a file that is provided from the State General Services Commission. If a bidder is awarded a project or purchase from one of the TAMUS member parts, the bidder must also be included on the FAMIS vendor file in order to issue the purchase order and to receive payment.

An easy way for you to make sure the bidder is on the vendor list is to copy its bidder record to the FAMIS vendor file. You may use Screen 457 to copy a bidder, either State or local, to the vendor file.

**Screen 457 - Copy Bidder to Vendor**

<table>
<thead>
<tr>
<th>457 Copy Bidder to Vendor</th>
<th>11/18/10 14:56</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Screen:</strong> __  <strong>Bidder:</strong> lvvvvvvvvvAC  <strong>Type (S or L):</strong> L  <strong>Local Bidders</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Vendor Search:</strong> __  <strong>444 INTERCOASTAL PKWY</strong></td>
<td></td>
</tr>
<tr>
<td>__  <strong>Type (N, I):</strong> _  <strong>ARLINGTON</strong></td>
<td></td>
</tr>
<tr>
<td><strong>76011</strong></td>
<td></td>
</tr>
</tbody>
</table>

**Copy to Vendor File:** N  (Enter a 'Y' to copy a bidder to vendor file)

```
* --------------------------------- VENDORS --------------------------------- *
  -- Bid To --
 _ DALES ELECTRICAL SUPPLY CO     455 DALEWOOD STREET  BRYAN         TX  R
 _ DALES ELECTRICAL SUPPLY CO     P O BOX 366          BRYAN         TX
 _ DALES ELECTRICAL SUPPLY CO     479 INTERCOASTAL PK  ARLINGTON     TX  R
 _ DALES ELECTRICAL SUPPLY CO     PO BOX 2222          WACO          TX  R
** End of list - 4 02 Campus vendor(s) found
```

**Basic Steps**

**Copy a Bidder to the Vendor File**

- Type a bidder identification number in the **Bidder** field and press <ENTER> to display all vendor information that exists for a particular SSN/FEI.
- If any information is displayed, check the address against the address of the bidder you are planning to copy. If it is the same, the bidder has already been entered on the vendor file and does not need to be copied. If no information is displayed, or if the address is different from the one you are copying, this bidder does not exist on the vendor file and may be copied if you wish.
- Indicate whether or not you would like to copy the bidder information to the FAMIS vendor file.
- Press <ENTER> to add the bidder to the vendor file.
- Type an “X” next to a vendor and press <ENTER> to advance to Screen 103 where more detailed information about the vendor may be entered on the system.
Screen 457 – Copy Bidder to Vendor (cont’d)

Search the Vendor File
- Type a bidder identification number in the Bidder field or type the name (or portion of the name) of the vendor you would like to display.
- Indicate whether you are searching by Name (N) or Vendor Identification Number (I).
- Press <ENTER> to display a list of FAMIS vendors.
- Type an “X” next to a vendor and press <ENTER> to advance to Screen 103 where more detailed information about the vendor may be entered on the system.

Field Descriptions (◆ = Required; [Help] = Field Help Available Using PF2, ? or *)

**Action Line**
- **Bidder:** 
  13 digits/characters
  Enter the bidder’s identification number you would like to copy to the FAMIS vendor file.
- **Type (S or L):** 
  1 character
  Identify the type of bidder: State (S) or local (L) bidder.
- **Vendor Search:** 
  20 characters/digits
  Indicate the name (or portion of the name) or the vendor identification number (or portion of the number) for which you would like to search the FAMIS vendor file.
- **Type (N, I):** 
  1 character
  [Help] Signify whether you want to search by vendor identification number (I) or vendor name (N).
- **Copy to Vendor File:** 
  1 character
  Type “Y” to copy the bidder to the vendor file.

**Screen Information**

- **Vendors**
  - **S:** 
    1 character
    Type “X” and press <ENTER> to select a vendor and to advance to Screen 103.
  - **Name:** 
    30 characters
    Shows the name of the selected vendor.

  **Fields displayed change when you press the PF keys at the bottom of the screen.**

- **PF6 – Vendors**
  - **Vendor:** 
    13 digits
    Displays vendor identification number if you press PF6.
  - **City:** 
    13 characters
    Identifies the name of the city to which correspondence should be sent.
Screen 457 – Copy Bidder to Vendor (cont’d)

**St:**
2 characters
Shows the state where correspondence is sent.

**PF 9 – Remit To**
**Address Line:** 15 digits/characters
Displays the mailing address to which correspondence should be sent.

**City:**
10 characters
Displays the city to which correspondence should be mailed.

**St:**
2 characters
Displays the code of the state to which correspondence should be mailed.

**PF 11 – Order From**
**Address Line:** 15 digits/characters
Displays the mailing address to which correspondence should be sent.

**City:**
10 characters
Displays the city to which correspondence should be mailed.

**St:**
2 characters
Displays the code of the state to which correspondence should be mailed.

**Df:**
1 character
Shows the default address code:
B = Bid To
R = Remit To

**PF 12 – Bid To**
**Address Line:** 15 digits/characters
Displays the mailing address to which correspondence should be sent.

**City:**
10 characters
Displays the city to which correspondence should be mailed.

**St:**
2 characters
Displays the code of the state to which correspondence should be mailed.

**Df:**
1 character
Shows the default address code:
B = Bid To
R = Remit To

**Additional Functions**
**PF KEYS**
See the Appendix for an explanation of the standard PF keys.

These PF keys toggle the information displayed at the bottom of the screen.

**PF6 Vndrs**
Vendor Information
Used to change the screen to display the vendor identification number instead of the “Remit To” address.
<table>
<thead>
<tr>
<th>PF9</th>
<th>Remit Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>PF11</td>
<td>Order Information</td>
</tr>
<tr>
<td>PF12</td>
<td>Bidder Information</td>
</tr>
</tbody>
</table>

**Remit Information**

Used to change the screen to display "Remit To" address instead of the vendor identification number.

**Order Information**

Used to change the screen to show the address where the order is to be sent.

**Bidder Information**

Displays the vendor's "Bid To" address.
Copy HUB to Bidder

Screen 459 provides the ability to copy a HUB vendor that appears on Screen 173 and Screen 174 to a bidder that can be used on a bid list. The vendor will be copied to the Local Bidders list. This screen will only copy the name and address. No commodity information is available from the Screen 173 and Screen 174 information. The commodity information will have to be entered manually.

### Screen 459 - Copy HUB to Bidder (Panel 1)

<table>
<thead>
<tr>
<th>S</th>
<th>Name</th>
<th>Address Line</th>
<th>City</th>
<th>St</th>
<th>Zip</th>
</tr>
</thead>
<tbody>
<tr>
<td>_</td>
<td>A &amp; A INDUSTRIAL SUPPLY</td>
<td>10817 NOTUS LANE</td>
<td>EL PASO</td>
<td>TX</td>
<td>79935</td>
</tr>
<tr>
<td>_</td>
<td>A &amp; C PLASTIC PRODUCTS INC</td>
<td>6035 NORTHDALE</td>
<td>HOUSTON</td>
<td>TX</td>
<td>77087</td>
</tr>
<tr>
<td>_</td>
<td>A &amp; D PORTABLE TOILETS</td>
<td>PO BOX 2954</td>
<td>BRYAN</td>
<td>TX</td>
<td>77805</td>
</tr>
<tr>
<td>_</td>
<td>A &amp; E JANITORIAL SERVICE</td>
<td>14501 FITZGIBBON DR</td>
<td>AUSTIN</td>
<td>TX</td>
<td>78726</td>
</tr>
<tr>
<td>_</td>
<td>A B COMMERCIAL JANITORIAL</td>
<td>8700 LONG POINT</td>
<td>SUI HOUSTON</td>
<td>TX</td>
<td>77055</td>
</tr>
<tr>
<td>_</td>
<td>A B DICK PRODUCTS CO OF DALLAS</td>
<td>205</td>
<td>DALLAS</td>
<td>TX</td>
<td>75229</td>
</tr>
<tr>
<td>_</td>
<td>A B DICK PRODUCTS COMPANY OF W</td>
<td>141 SLOPPVIEW</td>
<td>CIRCLE</td>
<td>CHINA SPRING</td>
<td>TX</td>
</tr>
<tr>
<td>_</td>
<td>A B E SYSTEMS INC</td>
<td>PO BOX 34</td>
<td>BRYAN</td>
<td>TX</td>
<td>77806</td>
</tr>
</tbody>
</table>

**More Bidders - Press <ENTER> to view**

### Screen 459 - Copy HUB to Bidder (Panel 2)

<table>
<thead>
<tr>
<th>S</th>
<th>Name</th>
<th>Address Line</th>
<th>City</th>
<th>St</th>
<th>Zip</th>
</tr>
</thead>
<tbody>
<tr>
<td>_</td>
<td>A &amp; A INDUSTRIAL SUPPLY</td>
<td>10817 NOTUS LANE</td>
<td>EL PASO</td>
<td>TX</td>
<td>79935</td>
</tr>
<tr>
<td>_</td>
<td>A &amp; C PLASTIC PRODUCTS INC</td>
<td>6035 NORTHDALE</td>
<td>HOUSTON</td>
<td>TX</td>
<td>77087</td>
</tr>
<tr>
<td>_</td>
<td>A &amp; D PORTABLE TOILETS</td>
<td>PO BOX 2954</td>
<td>BRYAN</td>
<td>TX</td>
<td>77805</td>
</tr>
<tr>
<td>_</td>
<td>A &amp; E JANITORIAL SERVICE</td>
<td>14501 FITZGIBBON DR</td>
<td>AUSTIN</td>
<td>TX</td>
<td>78726</td>
</tr>
<tr>
<td>_</td>
<td>A B COMMERCIAL JANITORIAL</td>
<td>8700 LONG POINT</td>
<td>SUI HOUSTON</td>
<td>TX</td>
<td>77055</td>
</tr>
<tr>
<td>_</td>
<td>A B DICK PRODUCTS CO OF DALLAS</td>
<td>205</td>
<td>DALLAS</td>
<td>TX</td>
<td>75229</td>
</tr>
<tr>
<td>_</td>
<td>A B DICK PRODUCTS COMPANY OF W</td>
<td>141 SLOPPVIEW</td>
<td>CIRCLE</td>
<td>CHINA SPRING</td>
<td>TX</td>
</tr>
<tr>
<td>_</td>
<td>A B E SYSTEMS INC</td>
<td>PO BOX 34</td>
<td>BRYAN</td>
<td>TX</td>
<td>77806</td>
</tr>
</tbody>
</table>

**More Bidders - Press <ENTER> to view**

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

**Copy a Bidder to the Vendor File**
- Type a HUB vendor identification number in the **HUB ID** field.
- Include the desired search criteria in the **Bidder Search** field. You may type the vendor’s name to view a specific bidder, or type a partial name to see a list of vendors that match what you are searching for.
- Indicate whether you want to search by vendor name (N) or identification number (N) in the **Type** field and press <ENTER>.
- Type an “X” next to the desired vendor(s) and press <ENTER> to advance to Screen 452.

**Copy HUB Bidder Process**

To copy a HUB vendor, you can get the State vendor ID from Screen 173/Screen 174 or enter part of the name in the **HUB ID** field. The name and address will be displayed.

If the State ID is entered a list of local bidders which have the first 10 characters of the bidder ID matching the State ID entered will be displayed. If no bidders match the State vendor ID entered, the message “7671 Bidder xxxxxxxxx not found” will appear.

If the vendor does not exist on the local bidders list, enter a “Y” in the Copy to Bidder File: field. This will copy the vendor to the local bidder file. The name of the new local bidder will then appear in the bottom portion of the screen.

**Search for Existing Bidder**
If a partial name is entered in the **HUB ID** field, a pop-up window will appear displaying local bidders that match the specified partial name. You will be able to see whether the vendor exists on the local bidders list.

Another way to search for existing local bidders is to enter a name or ID number in the **Bidder Search** field. You must include the type of search (Name or ID) in the **Type** field to perform this function.

Once data is entered in the **Bidder Search** and **Type** fields, it must be blanked out in order to copy a bidder. If there is data in either of these fields the **Copy** field will be protected.

**Field Descriptions** *(◆ = Required;  Help = Field Help Available Using PF2, ?, or *)*

**Action Line**
- **◆ HUB ID:**
  11 digits
  Enter the HUB vendor identification number.
Screen 459 – Copy HUB to Bidder (cont’d)

Bidder Search: 20 characters
Indicate the bidder’s name or portion of the name for which you would like to search the FAMIS vendor file.

Type (N, I): 1 character
Signify whether you wish to search by vendor identification number (I) or vendor name (N).

Copy to Bidder File: 1 character
Type “Y” to copy the HUB vendor to the bidder file. This field will be protected if there is data in either the Bidder Search field or the Type field.

Screen Information

Panel 1

S: 1 character
Type “X” and press <ENTER> to select a vendor.

Name: 30 characters
Displays the name of the vendor

Address Line: 15 digits/characters
Shows the vendor’s mailing address.

City: 10 characters
Displays the city to which correspondence should be mailed.

St: 2 characters
Displays the code of the state to which correspondence should be mailed.

Zip: 5 digits
Identifies the vendor’s Zip code.

Panel 2

ID: 13 characters/digits
Displays the bidder’s identification number.

HUB Status: 1 character
Indicates the HUB status of the bidder: active HUB (A), a HUB on the CMBL (B), or not considered a HUB (N).

Gdr: 1 character
Identifies the gender of the bidder: male (M) or female (F).

Ethnic Code: 2 characters
Displays the bidder’s ethnic origin.

QISV: 1 character
“Y” indicates the bidder is a Qualified Information System Vendor.
Screen 459 – Copy HUB to Bidder (cont’d)

**Sm. Bus.**  
1 character  
“Y” indicates the bidder is classified as a small business.

**Additional Functions**

**PF KEYS**  
See the Appendix for an explanation of the standard PF keys.
View Commodities for a Bidder

Goods and services are associated with specific bidders within the FAMIS system. Commodities are associated with local bidders using Screen 453, while goods and services are automatically tied to State bidders through the file FAMIS processes from the State.

Screen 463 is used to display the commodities provided by specific bidders. You may use this screen to view both State and local bidders.

### Screen 463 - Bidder Commodity Inquiry

<table>
<thead>
<tr>
<th>Sel</th>
<th>Commodity</th>
<th>Commodity Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>_</td>
<td>285-14</td>
<td>CIRCUIT BREAKERS, LOAD CENTERS, BOXES, AND PANELBOARDS</td>
</tr>
<tr>
<td>_</td>
<td>285-61</td>
<td>METERS, INDICATING AND RECORDING OF POWER CONSUMPTION</td>
</tr>
<tr>
<td>_</td>
<td>285-79</td>
<td>SWITCHES, PARTS AND ACCESSORIES (MISCELLANEOUS)</td>
</tr>
<tr>
<td>_</td>
<td>285-96</td>
<td>UNINTERRUPTIBLE POWER SUPPLIES</td>
</tr>
<tr>
<td>_</td>
<td>476-25</td>
<td>MICROCOMPUTER AREA NETWORK COMPONENTS, ETHERNET:</td>
</tr>
<tr>
<td>_</td>
<td>730-12</td>
<td>COMPUTER-AUTOMATED MEASUREMENT AND CONTROL (CAMAC)</td>
</tr>
<tr>
<td>_</td>
<td>936-25</td>
<td>ELECTRICAL EQUIPMENT (EXCEPT CABLE AND WIRES, AND</td>
</tr>
</tbody>
</table>

7 Bidder/Comm remain - End of List

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

### Basic Steps

- Type a bidder's identification number or name in the **Bidder** field. You may also enter a partial name and select from a pop up window.
- Press <ENTER> to display a list of all goods and services associated with the selected bidder.
- You may type a commodity code and press <ENTER> to position a particular commodity at the top of the list.
- Press <ENTER> to scroll through the list of commodities for the bidder.
- Type an “X” next to a commodity and press <ENTER> to advance to Screen 451 where more detailed information about the commodity is available.

### Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

**Action Line**

◆ **Bidder:**

Enter the identification number for the bidder whose goods and services you would like to display.
Type of funds: 1 character
Identify the type of funds for the bidder: State (S) or local (L) bidder.

Commodity: 15 digits
Signify the commodity code for the goods/services to be displayed on the first line of the list.

**Screen Information**

Sel: 1 character
Type “X” and press <ENTER> to select the commodity for display on Screen 451.

Commodity: 15 digits
Indicates the commodity code for the goods/services associated with the bidder.

Commodity Name: 50 characters
Displays the commodity name of the goods/services associated with the bidder.

**Additional Functions**

PF KEYS
See the Appendix for an explanation of the standard PF keys.
Display the Bidder List by Commodity

When looking for bidders for a specific order, it is often more convenient to start with the commodity, rather than the bidder. **Screen 464** is used to display bidders for a specified commodity. The bidders may be displayed by district (for State) and type of fund (State, local, or both).

**Screen 464 - Bidder List by Commodity (Panel 1)**

<table>
<thead>
<tr>
<th>Sel</th>
<th>Bidder Name</th>
<th>HUB</th>
<th>Bid to Address</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>CENTRA ELECTRICAL SUP</td>
<td></td>
<td>PO BOX 4444</td>
</tr>
<tr>
<td></td>
<td>DEALS ELECTRICAL SUP</td>
<td></td>
<td>P O BOX 3456</td>
</tr>
<tr>
<td></td>
<td>ELLIS ELECTRIC SUPPL</td>
<td></td>
<td>2555 CANEVILLE AVE</td>
</tr>
</tbody>
</table>

*** End of Bidders List ***

**Screen 464 - Bidder List by Commodity (Panel 2)**

<table>
<thead>
<tr>
<th>Sel</th>
<th>Bidder Name</th>
<th>Org Ge St</th>
<th>Cnt</th>
<th>Cnt</th>
<th>Bidder ID</th>
<th>Exp Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>CENTRA ELECTRICAL SUP</td>
<td>L17xxxxx0AB</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>DEALS ELECTRICAL SUP</td>
<td>L17xxxxx0AB</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>ELLIS ELECTRIC SUPPL</td>
<td>L17xxxxx0AB</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*** End of Bidders List ***
Screen 464 – Bidder List by Commodity (cont’d)

Basic Steps

- Type a commodity code or commodity name in the **Commodity** field. You may also type an asterisk (*) and press <ENTER> to view a pop-up list of codes to select from.
- Indicate a particular district and type of funds, if desired.
- Press <ENTER> to display a list of all bidders associated with the commodity.
- Type a bidder name if you wish to position a particular bidder on the first line of the display.
- Type an “X” next to a bidder to select it for further display on Screen 452.

Field Descriptions (◆ = Required;  Help = Field Help Available Using PF2, ? or *)

**Action Line**

◆ Commodity: 15 digits
Indicate the commodity code for the list bidders to be displayed.

District: 2 characters
Signify the district from which you would like to list bidders.

◆ Type of funds: 1 character
Identify the type of bidder to display: State bidders (S), local bidders (L), or both State and local bidders (B).

Bidder Name: 40 characters
Enter the name of the bidder to be shown at the top of the display.

**Screen Information**

Panel 1

Commodity Name: 40 characters
Displays the commodity name of the goods or services for which bidders are being listed.

Sel: 1 character
Type “X” and press <ENTER> to select a bidder for display on Screen 452.

Bidder Name: 28 characters
Identifies the name of the bidder submitting the bid.

HUB: 1 character
Indicates the HUB status of the bidder: active HUB (A), a HUB on the CMBL (B), or not considered a HUB (N).

Bid to Address: 40 digits/characters
Identifies the mailing address to which bid information will be sent.
### Additional Information

**Panel 2**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
</table>
| Eth Org | 2 characters  
Indicates the ethnic origin of the bidder.  
BL = Black  
AS = Asian  
HI = Hispanic  
AM = American Indian  
WO = Woman Owned |
| Ge      | 1 character  
Identifies the gender of the bidder: male (M) or female (F). |
| St      | 1 character  
Shows whether or not the bidder has an office in the State of Texas. |
| Bid Cnt | 7 digits  
Indicates the bid count for the bidder for the current fiscal year. |
| Resp Cnt| 7 digits  
Displays bid response count for the displayed bidder for the current fiscal year. |
| Bidder ID| 13 characters/digits  
Displays the bidder’s identification number and is prefixed by S (State) or L (local). |
| Expiration Date | 8 digits  
Identifies the date bidder will go off the CMBL if they do not renew their application. |

**Additional Functions**

**PF KEYS**  
See the Appendix for an explanation of the standard PF keys.
Section VI
Local Commodity Maintenance
Create and Modify Commodity Codes

To add or modify local commodity code information, use Screen 451. It may also become necessary to freeze or delete certain commodity codes.

**You cannot update on State codes.**

### Screen 451 - Commodity Master Create/Modify

<table>
<thead>
<tr>
<th>451 Commodity Master Create/Modify</th>
<th>11/18/10 15:07</th>
</tr>
</thead>
<tbody>
<tr>
<td>CMHL Commodities</td>
<td></td>
</tr>
<tr>
<td>Commodity: 600-15</td>
<td>Type Fund(S or L): S</td>
</tr>
<tr>
<td>Cm Name: CALCULATORS, ELECTRONIC, DISPLAY/PRINTING TYPE, PR</td>
<td>Date estb: 11/08/1996</td>
</tr>
<tr>
<td>Buyer: ___ Phone: ___ Name: ___</td>
<td></td>
</tr>
<tr>
<td>Description: CALCULATORS, ELECTRONIC, DISPLAY/PRINTING TYPE, PR</td>
<td></td>
</tr>
<tr>
<td>Freeze: N Delete: N Drop: N</td>
<td></td>
</tr>
</tbody>
</table>

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

### Basic Steps

**Create New Local Commodity Codes**
- Type a new local commodity number in the *Commodity* field.
- Enter “L” (local) in the *Type Fund* field.
- Press <ENTER> to display existing commodity information. When no information appears, it means that the commodity code you wish to add does not already exist.
- Type the commodity name and at least the first line of the description.
- Type additional information in the available fields, as desired.
- Press <ENTER> to record the commodity information.

**Modify Existing Local Commodity Codes**
- Type a local commodity number in the *Commodity* field.
- Enter “L” (local) in the *Type Fund* field.
- Press <ENTER> to display existing commodity information.
- Add or modify information in the available fields, as desired.
- Press <ENTER> to record the local commodity information.
Commodity Maintenance Process

Commodity Aliases
Each time the description for a local commodity code is changed, an alias is created which is visible when a name search is evoked (see below).

Search for a Local Commodity Code
To initiate a local commodity code search, you can type an asterisk (*) in the Commodity field or you may type in a portion of the name of the commodity you are searching for. Also, you must type “L” in the Type of Fund field. This will bring up a pop-up window of all available local commodity codes. Type an “X” next to the code you wish to select and press <ENTER> to return to Screen 451. Or you may press PF4 to return to Screen 451 without selecting a commodity code.

Commodity Code Name Search and Select

Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ?, or *)

Action Line
◆ Commodity: Help 15 digits
Indicate the commodity code for the goods/services to add or modify.

◆ Type Fund(S or L): Help 1 character
Identify the type of bidders you wish to display State (S) or local (L) bidder information.

Screen Information
◆ Cm Name: 50 characters
Enter the commodity name to be added or modified.

Date estb: 8 digits
Signifies the date the commodity code was established in the system.
Screen 451 – Commodity Master Create/Modify (cont’d)

Last actv: 8 digits
Indicates the date activity was last recorded for the selected commodity.

Buyer: 3 characters
Type the initials of the buyer responsible for purchasing the selected goods/services.

Phone: 10 digits
Displays the phone number of the buyer.

Name: 30 characters
Shows the name of the buyer.

◆ Description: 4 lines (40 characters each)
Include a description of the goods/services to be added or modified.

◆ Freeze: Help 1 character
Type “Y” to freeze the commodity from further activity. Will default to “N.”

◆ Delete: 1 character
Enter “Y” to delete the commodity from the commodity file. Will default to “N.”

◆ Drop: 1 character
Type “Y” to drop the selected commodity from the system. Will default to “N.”

Additional Functions

PF KEYS
See the Appendix for an explanation of the standard PF keys.
Create and Modify a Commodity Alias

An alias is another name for a specified good or service other than its current record name. Aliases are often used to help locate a commodity code through a name search. Each commodity may have several aliases defined in FAMIS. Screen 458 is used to maintain the commodity alias for the local commodity codes.

Screen 458 - Commodity Alias Create/Modify

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>CommodityAlias</td>
<td>CALCULATORS, ELECTRONIC, DISPIY/PRINTING TYPE, PR</td>
</tr>
<tr>
<td>Drop</td>
<td>No</td>
</tr>
</tbody>
</table>

Basic Steps

Create a New Commodity Alias
- Type a commodity number in the **Commodity** field.
- Press <ENTER> to display existing alias information.
- Type all alternate names the product may be called.
- Press <ENTER> to record the commodity alias information.

Drop an Existing Commodity Alias
- Type a commodity number in the **Commodity** field.
- Press <ENTER> to display existing commodity information.
- Type a “Y” in the **Drop** field.
- Press <ENTER> to remove the alias from the system.
Commodity Maintenance Process

Commodity Search
If the commodity code is not known, typing an asterisk (*) in the Commodity field and pressing <ENTER> will access a pop-up window (see below) with a complete list of commodities and their identification numbers. Type an “X” next to the desired commodity code and press <ENTER> to select the commodity and return to Screen 458. Press PF4 if you wish to return to Screen 458 without selecting a commodity.

Commodity Code Name Search and Select

<table>
<thead>
<tr>
<th>Commodity Name</th>
<th>Commodity Code</th>
<th>Alias Frz Del</th>
</tr>
</thead>
<tbody>
<tr>
<td>_ CALCULATORS (PROGRAMMED FOR SU 305-06</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>_ CALCULATORS, ELECTRONIC, DISPL 600-15</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>_ CALCULATORS, ELECTRONIC, DISPL 600-16</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>_ CALCULATORS, ELECTRONIC, DISPL 600-17</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>_ CALCULATORS, ELECTRONIC, DISPL 600-19</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>_ CALCULATORS, ELECTRONIC, PRINT 600-21</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>_ CALCULATORS, ELECTRONIC, PRINT 600-22</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>_ CALCULATORS, MECHANICAL</td>
<td>600-25</td>
<td>Y</td>
</tr>
<tr>
<td>_ CALCULATORS, MECHANICAL</td>
<td>600-25</td>
<td>N</td>
</tr>
<tr>
<td>_ CALCULATORS, PROGRAMMED</td>
<td>305-06</td>
<td>Y</td>
</tr>
<tr>
<td>_ CALCULATORS, PROGRAMMED (FOR S 305-06</td>
<td>Y</td>
<td></td>
</tr>
</tbody>
</table>

** End of list - 11 commodity(s) found **

Drop a Commodity Alias
Entering “Y” in the Drop field on Screen 458 will remove a specific alias for the commodity from the system. No commodity data is lost when an alias is dropped.

Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

Action Line
◆ Commodity: 15 digits
Enter the commodity code for the goods/services whose aliases you would like to add or drop.

Screen Information
Commodity name: 50 characters
Displays the name of the commodity.
Screen 458 – Commodity Alias Create/Modify (cont’d)

- **Commodity alias:** 50 characters
  
  Identify the alias commodity name other than the current record name.

- **Drop:** 1 digit
  
  Type “Y” and press <ENTER> to drop the commodity alias from the system.

**Additional Functions**

**PF KEYS**

See the Appendix for an explanation of the standard PF keys.
Section VII
Commodity Inquiry
Commodity Inquiry – Basic Concepts

Search for a Commodity Code

You may search for commodity code names on any screen that contains the commodity code. The two types of commodity code searches include:

- Entering at least three alpha characters in the Commodity field. This will invoke a standard name search that will display any commodity that name begins with the characters entered.

- A “string search” takes considerably longer than the name search. This is invoked by entering the information needed surrounded by asterisks (*). For instance, to search for commodity codes that contain the word computer you would enter *computer*.

Commodity “Alpha” Search

The result of entering “compu” in the Commodity field of Screen 451, for example, is a list of commodity codes whose name starts with “compu” as shown below:

<table>
<thead>
<tr>
<th>Commodity Name Search Pop-Up Window</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>F0045 Mark Commodity with an 'X' to select</strong></td>
</tr>
<tr>
<td><strong>Screen: ___  Search: COMPU_______________ Type: N (N,C)</strong></td>
</tr>
<tr>
<td><strong>Include Frz/Del Commodities: N</strong></td>
</tr>
<tr>
<td>Commodity Name</td>
</tr>
<tr>
<td>COMPUTED RADIOGRAPHY DIGITIZING 898-21</td>
</tr>
<tr>
<td>COMPUTER - HARDWARE, CONSULTIN 918-28</td>
</tr>
<tr>
<td>COMPUTER - SOFTWARE, CONSULTIN 918-29</td>
</tr>
<tr>
<td>COMPUTER ACCESSORIES (NOT OTHE 984-30</td>
</tr>
<tr>
<td>COMPUTER ACCESSORIES AND SUPPL 207</td>
</tr>
<tr>
<td>COMPUTER AIDED DESIGN 209-31</td>
</tr>
<tr>
<td>COMPUTER AIDED DESIGN AND VECT 208-30</td>
</tr>
<tr>
<td>COMPUTER AIDED DESIGN SERVICE 920-18</td>
</tr>
<tr>
<td>COMPUTER AIDED DESIGN SERVICES 920-18</td>
</tr>
<tr>
<td>COMPUTER CENTER ISOLATION SYST 285-44</td>
</tr>
<tr>
<td>COMPUTER DIGITIZING SERVICES 920-19</td>
</tr>
<tr>
<td>COMPUTER HARDWARE AND PERIPHER 204</td>
</tr>
<tr>
<td>COMPUTER HARDWARE AND PERIPHER 205</td>
</tr>
<tr>
<td><strong>More Entries</strong></td>
</tr>
<tr>
<td><strong>PF4 to Exit</strong></td>
</tr>
</tbody>
</table>

Commodity “String” Search

The result of entering “*Add*” in the Commodity field of Screen 451, for example, is a list of commodity codes whose name contains the alpha characters “Add”, as shown below:
Screen 451 - String Search

Using the commodity string search may display more entries than you want to browse through. In this event, the following pop-up will appear to allow you to escape the search. You may try to refine your search by typing more alpha characters (e.g. You may wish to use *Adding* instead of *Add*) to narrow the results.
Browse Commodity Codes by Name

If you do not know the code for a particular commodity, you may use Screen 460 to browse through an alphabetical listing of all commodity codes on file. Type in the name, or a portion of the name, of the commodity you are looking for in the Commodity Name field. Press <ENTER> to display a list of all commodities on file that begin with that name.

Screen 460 - Commodity Name Search

<table>
<thead>
<tr>
<th>Sel</th>
<th>Commodity Name</th>
<th>Commodity</th>
<th>Alias</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>CALCIUM CARBONATE</td>
<td>325-12</td>
<td>N</td>
</tr>
<tr>
<td></td>
<td>CALCIUM CARBONATE AND SODIUM B</td>
<td>325-12</td>
<td>Y</td>
</tr>
<tr>
<td></td>
<td>CALCULATING MACHINE (NOT COMPUT)</td>
<td>939-15</td>
<td></td>
</tr>
<tr>
<td></td>
<td>CALCULATING MACHINES (NOT COMP)</td>
<td>939-15</td>
<td></td>
</tr>
<tr>
<td></td>
<td>CALCULATORS (PROGRAMMED FOR SU)</td>
<td>305-06</td>
<td></td>
</tr>
<tr>
<td></td>
<td>CALCULATORS, ELECTRONIC, DISPL</td>
<td>600-15</td>
<td></td>
</tr>
<tr>
<td></td>
<td>CALCULATORS, ELECTRONIC, DISPL</td>
<td>600-16</td>
<td></td>
</tr>
<tr>
<td></td>
<td>CALCULATORS, ELECTRONIC, DISPL</td>
<td>600-17</td>
<td></td>
</tr>
<tr>
<td></td>
<td>CALCULATORS, ELECTRONIC, DISPL</td>
<td>600-19</td>
<td></td>
</tr>
<tr>
<td></td>
<td>CALCULATORS, ELECTRONIC, PRINT</td>
<td>600-21</td>
<td></td>
</tr>
<tr>
<td></td>
<td>CALCULATORS, ELECTRONIC, PRINT</td>
<td>600-22</td>
<td></td>
</tr>
<tr>
<td></td>
<td>CALCULATORS, MECHANICAL</td>
<td>600-25</td>
<td></td>
</tr>
<tr>
<td></td>
<td>CALCULATORS, PROGRAMMED</td>
<td>305-06</td>
<td></td>
</tr>
<tr>
<td></td>
<td>CALCULATORS, PROGRAMMED (FOR S)</td>
<td>305-06</td>
<td></td>
</tr>
</tbody>
</table>

**End of list - 15 commodity(s) found**

Basic Steps

- Type the name, or any part of the name, in the Commodity field for the commodity you would like to select.
- Press <ENTER> to display an alphabetical listing of commodities beginning with the name or characters entered in the Commodity field.
- Type an “X” next to the commodity you would like to select.
- Press <ENTER> to advance to Screen 451 for a more detailed look at the commodity.

Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ?, or *)

**Action Line**

- **Commodity Name:** 20 characters
  Enter the commodity name, or portion of the name, you wish to search for.

- ◆ **Type Funds (S or L):** 1 character
  Indicates the type of bidder to display: State (S) or local (L) bidder information.

**Screen Information**

- **Sel:** 1 character
  Type “X” and press <ENTER> to select a commodity for further display on Screen 451.
Commodity Name: 22 characters
Displays the name of the commodity.

Commodity: 6 digits
Displays the commodity code used to identify goods and services in FAMIS.

Alias: 1 character
Indicates whether or not ("Y" or "N") the commodity name is an alias.

Additional Functions
PF KEYS
See the Appendix for an explanation of the standard PF keys.
Search Commodity List by Number

FAMIS provides you with a numerical listing of all commodities on file. You may view this list using Screen 461. Press <ENTER> to continue scrolling through the list of available commodities. You can also use this screen to search for a particular commodity by number, name, buyer or date range.

Screen 461 - Commodity List By Number

<table>
<thead>
<tr>
<th>Commodity</th>
<th>Commodity Name</th>
<th>Byr</th>
<th>Created</th>
<th>Used</th>
<th>F D</th>
</tr>
</thead>
<tbody>
<tr>
<td>895</td>
<td>WELDING EQUIPMENT AND SUP</td>
<td>___</td>
<td>11/08/96</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>895-10</td>
<td>ARC WELDERS, ELECTRIC DRI</td>
<td>___</td>
<td>11/08/96</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>895-20</td>
<td>ARC WELDERS, ENGINE DRIVE</td>
<td>___</td>
<td>11/08/96</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>895-21</td>
<td>ARC WELDERS, WIRE, SELF-F</td>
<td>___</td>
<td>11/08/96</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>895-25</td>
<td>ELECTRIC SPOT WELDER</td>
<td>___</td>
<td>11/08/96</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>895-27</td>
<td>ELECTRIC WELDING TORCH, F</td>
<td>___</td>
<td>11/08/96</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>895-29</td>
<td>FITTINGS FOR WELDING EQUI</td>
<td>___</td>
<td>01/19/01</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>895-30</td>
<td>GAS CYLINDER CARTS, INDUS</td>
<td>___</td>
<td>11/08/96</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>895-40</td>
<td>GAS TUNGSTEN-ARC WELDER (</td>
<td>___</td>
<td>11/08/96</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>895-45</td>
<td>GAS SHIELDED METAL-ARC WE</td>
<td>___</td>
<td>11/08/96</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>895-48</td>
<td>GAS WELDING APPARATUS (GA</td>
<td>___</td>
<td>11/08/96</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>895-50</td>
<td>GAS WELDING APPARATUS</td>
<td>___</td>
<td>11/08/96</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>895-55</td>
<td>TORCH, CUTTING</td>
<td>___</td>
<td>01/19/01</td>
<td>N</td>
<td>N</td>
</tr>
</tbody>
</table>

**Press <ENTER> to continue search**

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

Basic Steps

**Search by Commodity Number**

- Indicate whether you would like to display the State (S) or local (L) commodity list.
- Press <ENTER> to scroll through the numerical listing of all available commodities.
- To begin searching at a specific commodity code, type that number on the line underneath the word “Commodity.”
- Type an “X” next to a commodity and press <ENTER> to select it for further display on Screen 451.

**Search by Commodity Name or Buyer**

- Indicate whether you would like to display the State (S) or local (L) commodity list. To begin searching at a specific commodity name, type that name underneath the words "Commodity Name" and press <ENTER>.
If you wish to display commodities associated with a particular buyer, type his/her buyer code underneath the word "Byr" and press <ENTER>.

Type an “X” next to a commodity and press <ENTER> to select it for further display on Screen 451.

Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ?, or *)

**Action Line**

◆ Type Funds(S or L): 1 character
Indicate the type of list to display for the commodity entered: State (S) or local (L).

**Screen Information**

Sel: 1 character
Type “X” and press <ENTER> to select a commodity for display on Screen 451.

Commodity: 15 digits
Indicates the commodity code for the goods/services displayed.

Commodity Name: 25 characters
Displays the commodity name of the goods/services displayed.

Byr: 3 characters
Shows the initials of the buyer responsible for purchasing the selected goods/services.

Date Created: 8 digits
Indicates the date the commodity was created.

Date Used: 8 digits
Shows last date on commodity was used on a bid list.

**Flags**

F: 1 character
“Y” indicates commodity has been frozen.

D: 1 character
“Y” indicates commodity has been deleted.

**Additional Functions**

PF KEYS
See the Appendix for an explanation of the standard PF keys.
Instructions

Listed below are general instructions that will make your job easier as you use FAMIS to input or view document information. Please become familiar with the information in this reference as it can make your navigation in FAMIS more efficient.

3270 Emulation Keys

Special keys and key combinations must be used when working with FAMIS. These keys are known as 3270 emulation keys and may be defined differently by each 3270 terminal or PC emulation software that you are using. Contact your computer support person if you do not know how to identify the following keys on your computer.

PF Keys
When a key is listed as PFn, “PF” represents Program Function. Many PCs use the function keys labeled Fn for these PF keys. Others have special combinations of keys to represent the PF keys, for example, on a Memorex emulation, a combination of the ALT key and the number 1 will represent the PF1 key.

At the bottom of the FAMIS screens, there are PF keys listed that can assist in the use of the screen. For example, at the bottom of Screen 164 (Voucher Inquiry by PO Number) there is a PF11 key with the word “Right” under it. This means that by pressing the PF11 key, the screen listing will scroll to the right for an additional panel of information.

TAB and BACKTAB Keys
Use the TAB and BACKTAB keys on a 3270 terminal to move from field to field. This will position the cursor at the start of each field. Most PCs have a key labeled TAB, while the BACKTAB is a combination of the SHIFT/TAB keys.

Using the arrow keys, instead of the TAB keys, to move around the screen may lock the computer keyboard. Use the RESET key, then the TAB key, to position the cursor and unlock the keyboard.

CLEAR Key
The CLEAR key on many PC keyboards is the PAUSE key. This key is often used to clear, or refresh, the screen before typing.

RESET Key
After pressing <ENTER> to process data information, note the status bar at the bottom of the screen. When the system is processing information, the symbol “X ()” or  will appear. You cannot enter additional information until the system is finished processing. If any other symbols appear, press your RESET key -- often the ESCAPE key on a PC.
Appendix – Instructions (cont’d)

**ERASE END OF FIELD Key**
To erase all the information in a field with one stroke, the **ERASE EOF** key on a 3270 keyboard is helpful. For example, a vendor name is held in context when moving from screen to screen. To change to a different vendor, use this key and the current vendor name on the Action Line will be removed. Now the new vendor name can be input. On most PCs, the correct key to use is the **END** key on the numeric keypad.

**HOME Key**
From anywhere on the screen, the most efficient way to take the cursor back to the **Screen** field on the Action Line is by pressing certain keys. For the 3270 terminals, the correct combination is the **ALT/RULE** keys. On most PCs, the **HOME** key on the numeric keypad will work.

**Protected Area**

The **Protected Area** is the area of the screen that will not allow the user to enter information. Typing information in the protected area may freeze the screen. Use your **reset** key and then **tab** key to release your system when it freezes.

**Action Line/Context**

The **Action Line** is usually the first line of information on each screen. The **Screen** field is used to navigate from screen to screen by entering the number of the screen desired. Fields such as screen, vendor, voucher number, account, etc. are often found on the Action Line.

Data that is entered on the Action Line will be carried in “context” from screen to screen until changed. For example, the GL account number 032365 is entered on the Action Line of the screen below. That account will be carried in “context” until the user keys a different account in the field.

The **<ENTER>** key **must** be pressed after entering **Action Line** data. If a user does not follow this step, all information entered on the screen may be lost and must be re-entered. After pressing **<ENTER>**, a message will be given at the top of the screen asking for modifications or providing further processing instructions.

---

F0002 Record has been successfully added  
002 GL 6 Digit  
08/01/11 09:17  
FY 2011 CC 02  

Screen: ___  Account: 032365  ___  NAVSO, INC  

Account Title: NAVSO, INC.  ___  SRS: ___
Appendix – Instructions (cont’d)

Message Line

The line above the Action Line is used to display messages to the user. These messages may be error messages or processing messages, such as the one below.

| F6537 Please enter a valid six digit GL account |
| 002 GL 6 Digit                                 |
| 01/20/92 11:26                               |

Scrolling Through Data

Pressing <ENTER> will scroll through information listed on a screen. On some screens, there are PF keys to use to scroll forward, backward, left and right. These PF keys are displayed at the bottom on the screens with that function.

Help

HELP functions are available for many screen fields in FAMIS. Typing a question mark (?) in the blank beside the desired field and pressing <ENTER> will access a pop-up window with specified field information. Another way is to place your cursor in the desired field and press PF2.

To get out of the HELP function, either select a value and press <ENTER> or press PF4. The distinction on which key to use will normally be designated in the pop-up window (EX: PF4 = Exit).

Escaping from a Pop-Up Window

When in a pop-up window, pressing PF4 will usually take you back to the original screen. There are a few screens when pressing <ENTER> will take you back to the original screen.
Field Help Using the F2 Program Function Key

On selected fields, additional information can be displayed using the F2 program function key. This HELP information is accessed by moving the cursor to the field in question and pressing **PF2**.

The first help screen describes the field; pressing <ENTER> will display the values for the field.
Appendix – Instructions (cont’d)

Question Mark (?) Help

FAMIS has a Help feature on some screen fields that will display a field definition and/or values that may be entered.

To use the Help feature, type a question mark (?) or asterisk (*) in the field and press <ENTER>. If Help is available for the field, a pop-up window will appear displaying a definition and/or valid values. To make a selection, type an “X” next to a value and press <ENTER> to pass it back to the previous screen. This is called the “Passback” feature.

Screen 2 - GL 6 Digit

<table>
<thead>
<tr>
<th>Screen: ___</th>
<th>Account: 010100</th>
<th>ED &amp; GEN INCOME-TUITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Title: ED &amp; GEN INCOME-TUITION</td>
<td>SRS: _</td>
<td></td>
</tr>
<tr>
<td>Resp Person: 5uuuuuuu4 MASON, MOLLY M</td>
<td>Old Acct: NA</td>
<td></td>
</tr>
<tr>
<td>Function: __</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Default Bank: 06000</td>
<td>Override: Y</td>
<td>SL Mapped Count: 22</td>
</tr>
<tr>
<td>Alternate Banks: *****</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>Dept S-Dept Exec Div Coll Mail Cd Stmt</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Primary: REV_ _____</td>
<td>UN</td>
<td>AD</td>
</tr>
<tr>
<td>Secondary: VTEA_ _____</td>
<td>AA</td>
<td>CD</td>
</tr>
</tbody>
</table>

Fund Source: __ ______________________________________ | Account Letter: Y |
Long Title: EDUCATIONAL AND GENERAL INCOME - TUITION | Setup Dt: 08/26/1991 |
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---

Hmenu Help  EHelp       Next

Screen 2 - GL 6 Digit - Fund Group ?-Help Pop-Up Window

<table>
<thead>
<tr>
<th>Screen: ___</th>
<th>** More Codes - Press &lt;ENTER&gt; to View **</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Titl</td>
<td>Search Criteria: AFR Fund Group: 10</td>
</tr>
<tr>
<td>Resp Person:</td>
<td></td>
</tr>
<tr>
<td>Year-end Pro</td>
<td>AFR Sub</td>
</tr>
<tr>
<td>AFR Fund G</td>
<td>Fund Fund Fund Description</td>
</tr>
<tr>
<td>Func</td>
<td>X 10 FG FUNCTIONAL AND GENERAL</td>
</tr>
<tr>
<td>Default</td>
<td>20 DS DF DESIGNATED/FUNCTIONAL &amp; GENERAL</td>
</tr>
<tr>
<td>Alternate B</td>
<td>21 DS DS DESIGNATED/SERVICE DEPARTMENTS</td>
</tr>
<tr>
<td></td>
<td>22 DS ST DESIGNATED/SERV DEPT-MATERIAL &amp; SUP</td>
</tr>
<tr>
<td></td>
<td>23 DS SM DESIGNATED/SERV DEPT-COMM &amp; UTIL</td>
</tr>
<tr>
<td>Pri</td>
<td>24 DS SU DESIGNATED/SERV DEPT-REPAIRS &amp; MAIN</td>
</tr>
<tr>
<td>Seco</td>
<td>25 DS SR DESIGNATED/SERV DEPT-RENTALS &amp; LEAS</td>
</tr>
<tr>
<td></td>
<td>26 DS SL DESIGNATED/SERV DEPT-PRINTING &amp; REP</td>
</tr>
<tr>
<td>Fund So</td>
<td>27 DS SF DESIGNATED/SERV DEPT-CLAIMS &amp; LOSS</td>
</tr>
<tr>
<td>Long T</td>
<td>28 DS SC DESIGNATED/SERV DEPT-OTHER OPER EXP</td>
</tr>
<tr>
<td></td>
<td>29 DS SO DESIGNATED/SERV DEPT-OTHER OPER EXP</td>
</tr>
<tr>
<td>Account Le</td>
<td>30 AX AX AUXILIARY NON-PLEDGED</td>
</tr>
</tbody>
</table>

Enter-PF1---PF | Select an AFR Fund Group or Press <PF4> to Quit |
Hmenu He +----------------------------------------------------------+
Standard PF Keys

PF Keys are used in FAMIS to access additional information. Wherever possible the same assignment has been given to the same PF key, such as PF2 always being the key used for HELP. Occasionally this has not been possible and a different assignment has been made.

The following list is to help you identify the functionality behind the PF keys that you will see on the many screens in the purchasing modules of FAMIS.

Many screens have extended information windows assigned to various function keys that are designated at the bottom of each screen and pop-up window. Placing the cursor (using the cursor arrow keys) on a particular line and pressing the extended information function key will display the pop-up window information for the document or item on that line.

Typically, exiting a pop-up window is done by pressing PF4 to return to the previous window or inquiry screen. If multiple windows have been opened pressing PF3 will return you directly to the screen where you started.

From within many of the pop-up windows an additional set of extended function keys may appear to further inquire on the document or item.

Extended Function Keys

EHelp  Not Used in FAMIS

Help  On-Line Help
On selected fields, additional information may be displayed. This information is accessed by moving the cursor to the field in question and pressing the PF2 key for Help. The first screen accessed will describe the field; pressing <ENTER> will display any valid values available for the field (see below).

<table>
<thead>
<tr>
<th>DESCRIPTION: AN INSTITUTIONALLY DEFINED CODE THAT GROUPS CURRENT FUND EXPENDITURES ACCORDING TO THE PURPOSE FOR WHICH COSTS WERE INCURRED.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>-----------</strong>* DICTIONARY - HELP *<strong>-----------</strong></td>
</tr>
<tr>
<td>VALUES</td>
</tr>
<tr>
<td>AS</td>
</tr>
<tr>
<td>AX</td>
</tr>
<tr>
<td>BLANK</td>
</tr>
<tr>
<td>IN</td>
</tr>
<tr>
<td>IS</td>
</tr>
<tr>
<td>PL</td>
</tr>
<tr>
<td>PS</td>
</tr>
<tr>
<td>RR</td>
</tr>
<tr>
<td>Lookup Value / . Menu</td>
</tr>
<tr>
<td>View : IAFRS-GENERAL-SUBSIDIARY-LEDGER</td>
</tr>
<tr>
<td>Field: FG-FS-PURP</td>
</tr>
</tbody>
</table>
Appendix – Standard PF Keys (cont’d)

<table>
<thead>
<tr>
<th>Key</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>HMenu</td>
<td>Not Used in FAMIS.</td>
</tr>
<tr>
<td>Left</td>
<td>Scroll Screen Left</td>
</tr>
<tr>
<td></td>
<td>Some windows are made up of several adjacent panels. These will be designated by the word <strong>Panel: ##</strong> appearing in the window.</td>
</tr>
<tr>
<td></td>
<td>Pressing this key scrolls the panel to the <strong>left</strong>.</td>
</tr>
<tr>
<td>Print</td>
<td>Print Account Information</td>
</tr>
<tr>
<td></td>
<td>Used to print account information from FAMIS using Entire Connection.</td>
</tr>
<tr>
<td></td>
<td>See the FAMIS Entire Connection for Windows User’s Manual for greater detail.</td>
</tr>
<tr>
<td>Right</td>
<td>Scroll Screen Right</td>
</tr>
<tr>
<td></td>
<td>Some windows are made up of several adjacent panels. These will be designated by the word <strong>Panel: ##</strong> appearing in the window.</td>
</tr>
<tr>
<td></td>
<td>Pressing this key scrolls the panel to the <strong>right</strong>.</td>
</tr>
</tbody>
</table>
Bids and Commodities Screens List

M41 Commodity and CMBL Bidders Menu
Provides a list of screens to create, modify, and view bidder information.

M42 Bids and Bid Lists Menu
Provides a list of screens to create and modify bid lists.

M44 Bid List Inquiry Menu
Provides a list of screens to display and browse master and specific bid lists.

216 Print Bid Document
Used to print or re-print a bid document at a time other than the scheduled bid print cycle.

308 Printer Maintenance
Campus specific screen used to define the on demand printer options for purchasing and bid documents.

410 Bid Header Create/Modify
Used to enter general information that pertains to the entire bid document.

411 Bid Shipping and Text
Records shipping and invoice addresses and special vendor text information.

412 Bid Header Text Continued
Used to record additional header text for a document.

413 Bid Sole Source
Used to enter sole source information.

414 Bid Line Item Create/Modify
Used to enter information that pertains to individual line items on the bid document.

415 Bid Item Description
Allows you to enter up to ninety-nine lines of additional item description.

416 Bid Document Close
Used to close a bid document after entry is completed. From this screen you may also send a document through the routing and approval process.

417 Bid Line Item Copy/Transfer
Allows you to copy/transfer line items from a bid document to a new or existing bid, purchase order, or requisition.

418 Bid Flag Maintenance
Used to perform maintenance to a document or its items. A document may be canceled/deleted, frozen, or reopened. Document items may also be deleted on this screen.

419 Bid Note Text
Use this screen to add informational type notes to document items.

420 Master List Create
Used to maintain a list of preferred bidders for a specified commodity.

421 Copy Master List to Specific List
Used to copy an existing master list to a new specific bid list.
### Appendix – Bids and Commodities Screens List (cont’d)

<table>
<thead>
<tr>
<th>Code</th>
<th>Screen Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>422</td>
<td>Specific List Create</td>
<td>Provides a list of bidders from whom bids may be accepted for a specified bid document.</td>
</tr>
<tr>
<td>423</td>
<td>Bid List Bidder Modify</td>
<td>Used to display and modify vendors on a particular list.</td>
</tr>
<tr>
<td>424</td>
<td>Bid List Header Maintenance</td>
<td>Used to modify the header of master and specific bid lists.</td>
</tr>
<tr>
<td>426</td>
<td>Copy Specific List to Specific List</td>
<td>Used to copy an existing specific list to a new specific bid list.</td>
</tr>
<tr>
<td>428</td>
<td>Bid List Flag Maintenance</td>
<td>Used to set/reset flags for master and specific bid lists.</td>
</tr>
<tr>
<td>430</td>
<td>Bid List Response</td>
<td>Used to monitor response from bidders on a specific list.</td>
</tr>
<tr>
<td>451</td>
<td>Create/Modify Commodity Master</td>
<td>Used to add and update commodity information.</td>
</tr>
<tr>
<td>452</td>
<td>Bidder Create/Maintain</td>
<td>Used to create or update bidder information.</td>
</tr>
<tr>
<td>453</td>
<td>Bidder With Multiple Commodities</td>
<td>Used to associate bidders with the goods and services they provide.</td>
</tr>
<tr>
<td>454</td>
<td>Bidder Flag Maintenance</td>
<td>Used to freeze or delete a bidder.</td>
</tr>
<tr>
<td>455</td>
<td>Copy State Bidder Commodities</td>
<td>Copy commodities from State bidder to Local bidder.</td>
</tr>
<tr>
<td>456</td>
<td>Copy Vendor to Bidder</td>
<td>Used to copy FAMIS Vendor information to the bidder file.</td>
</tr>
<tr>
<td>457</td>
<td>Copy Bidder to Vendor</td>
<td>Used to copy bidder information to the FAMIS vendor file.</td>
</tr>
<tr>
<td>458</td>
<td>Commodity Alias Create/Mod</td>
<td>Used to assign alternate names to the commodity list.</td>
</tr>
<tr>
<td>459</td>
<td>Copy HUB to Bidder</td>
<td>Used to copy HUB data from Screen 173 HUB file to a local bidder.</td>
</tr>
<tr>
<td>460</td>
<td>Commodity Name Search</td>
<td>Provides an alphabetical listing of all commodities found on the system.</td>
</tr>
<tr>
<td>461</td>
<td>Commodity by Number</td>
<td>Provides a numerical listing of all commodities found on the system.</td>
</tr>
<tr>
<td>463</td>
<td>Commodity Inquiry</td>
<td>Provides an alphabetical listing of all commodities associated with a particular bidder.</td>
</tr>
<tr>
<td>464</td>
<td>Bidder List by Commodity</td>
<td>Used to view a list of all bidders associated with a particular commodity.</td>
</tr>
<tr>
<td>480</td>
<td><strong>Master List Browse</strong></td>
<td>Provides a list of master lists currently available on the system.</td>
</tr>
<tr>
<td>481</td>
<td><strong>Master List Browse by Commodity</strong></td>
<td>Provides a list of master lists, sorted by its associated commodity code that is currently available.</td>
</tr>
<tr>
<td>485</td>
<td><strong>Specific List Browse</strong></td>
<td>Provides a list of specific lists currently available on the system.</td>
</tr>
<tr>
<td>486</td>
<td><strong>Specific List Browse by Date/Time</strong></td>
<td>Provides a list of specific lists, sorted by its open date and time that are currently available on the system.</td>
</tr>
<tr>
<td>487</td>
<td><strong>Specific List Browse by Buyer/Date/Time</strong></td>
<td>Provides a list of specific lists, sorted by its buyer, open date and time that are currently available on the system.</td>
</tr>
<tr>
<td>488</td>
<td><strong>Specific List Browse by Comm/Date/Time</strong></td>
<td>Provides a list of specific lists, sorted by its commodity, open date and time that are currently available.</td>
</tr>
<tr>
<td>497</td>
<td><strong>Master List Bidders</strong></td>
<td>Used to display all bidders associated with a particular specific bid list.</td>
</tr>
<tr>
<td>498</td>
<td><strong>Specific List Bidders</strong></td>
<td>Used to display all bidders associated with a particular specific bid list.</td>
</tr>
</tbody>
</table>
Glossary

A

ABR
See Automatic Budget Reallocation.

ABR Pool Table
A user-defined table assigning rules for budget pools and the subcode ranges participating in each pool.

Account
A functional unit, identified by an account ID that serves a particular accounting purpose where one person has primary responsibility for it. Accounts include balance sheets (GL) and revenue/expenditure accounts (SL). A building (in the Plant Funds area) is an example of a General Ledger account and the President’s Office is an example of a Subsidiary Ledger account.

Account Control
The last four digits in the ten-digit account number for a General Ledger account. The account control designates a specific asset, liability, fund balance, fund addition, fund deduction or summary control.

Account ID
A 6-digit identification number for an account.

Account Number
A 10-position ID within the master file of the Financial Records System. The first 6 positions identify the specific account while the last four positions identify the account control for a balance sheet account (GL) and the object code for a revenue or expenditure account (SL).

Accounts Payable

Action/Context Line
The screen line (usually fourth from the top) or lines where the screen to be accessed and the key of the data to be addressed are input and displayed.

Alias
A commonly used name for a vendor, other than the formal customer name (primary name) that prints on the check. The Purchasing System also offers a commodity alias name and permits you to define any number of alias names, once a vendor has been created.

AP
See Accounts Payable.

Attributes
Descriptive data associated with a record. Examples are school, department, function, name and responsible person. Attributes support a variety of sophisticated reporting techniques.

Automatic Budget Reallocation (ABR)
When transactions are entered, a process by which the system automatically transfers budget dollars from predefined budget pools to specific object codes.

B

Bank Transfer
A movement of cash from one bank account to another. This allows expenditures at specific object codes to share in a single pool of money.
Appendix – Glossary (cont’d)

**Batch/Session**
A collection of related transactions entered into the system with a header record and control totals, usually prepared by one person or subsystem feed.

**Batch Interface**
A type of interface where one system generates transactions to be batched for input into another system.

**BBA**
See Budget Balance Available.

**Beginning Balance**
Balances posted during implementation.

**Budget**
A plan of revenue and expenditures for an accounting period expressed in monetary terms.

**Budget Balance Available (BBA)**
That portion of budget funds that is unspent and unencumbered.

**Budget Pool**
A budget summarized at significant levels of revenue or expense. A single pool of money defined for use by specific object codes.

**Buying Account**
Account which is allowed to “purchase” from a specific selling account via an interdepartmental transfer.

**Capital**
Assets, cash, means, property, resource.

**Cash**
Coins, currency, checks, and anything else a bank will accept for immediate deposit.

**Cash Disbursement**
A non-vouched payment for goods received, services rendered, reduction of debt or purchase of other assets.

**Cash Receipt**
Cash received from cash sales, collections on accounts receivable and sale of other assets.

**Chart of Accounts**
A listing, at the 6-digit level, of all account numbers within FAMIS. Sometimes the COA defines the accounts at the 10-digit level as well.

**Check Override**
The capability to bypass, on an individual-voucher basis, controls that were previously set for all vouchers.

**Claim-On-Cash**
The share of ownership that an account has in the institution’s money.

**Clearing Account**
A temporary summary account (such as a payroll account) which is periodically set to zero.

**COA**
See Chart of Accounts.
Appendix – Glossary (cont’d)

**Compound Journal Entry**
A two-sided transaction that posts debits and credits.

**Context**
The information that identifies the record being displayed or to be displayed by the system.

**Credit Memo**
The reduction of a payable previously paid or still open. A credit memo may result from overpayment, overbilling, or the return of goods.

**Currency Code**
A code that identifies a record in the Tax Currency Table. This record provides the factor to calculate foreign currency conversion costs or gains and the liability account used. The code is translated through a table into a conversion rate.

**Cycle**
Two or more programs that are run in a specific sequence.

**Data**
Data are representations, such as characters, to which meaning might be assigned. They provide information and can be used to control or influence a process. This term is not synonymous with information. Information is data to which meaning has been assigned.

**Database**
The collected information that is accessible to the computer for processing.

**Data Control**
The tracking of input, processing and output, and the comparing of actual results to expected results in order to verify accuracy.

**Data Element HELP**
An on-line feature that assists the user by providing immediate information about any particular field on a screen.

**Data Entry**
A means for adding information into the system.

**Default**
The value that the system will assign if no other value is entered.

**Default Mandatory**
Flag indicating whether the transfer is mandatory. If no value is entered in the detail lines for this field, the transfer will be flagged with the default value after pressing <ENTER>.

**Delete Flag**
A data element whose condition signifies that a document will be permanently removed from the database during the next archive cycle.

**Demand Voucher**
Voucher to be paid during the next Check Cycle.

**Diagnostic Message HELP**
An on-line feature that assists the user with data entry by providing an explanation of a message and the appropriate action to take.
Appendix – Glossary (cont’d)

Diagnostics
The messages that describe the results of processing. These messages may indicate an error and provide
information about a process by noting what action to take to correct the error.

Digit 3 of TC
The third digit of the Transaction Code (Entry Code) which specifies the type of transaction.

Disbursement
Record money paid out by the institution from GL, SL and SA or bank account. Can reverse an
encumbrance. A payment for goods received, services rendered, reduction of debt or purchase of other
assets that does not go through the AP/voucher system.

Discount Account
The account credited for discounts taken by the system when a check is written.

Discount Table
A table containing user-defined values representing discount terms for vendors.

Dollar Data
A record of the dollar amount and the type of financial transactions posted to an account.

Dollar Limit
A code used in Accounts Payable to specify a check amount. If the amount of a vendor’s check is greater
than this value, the check will not be generated.

Drop Flag
A data element whose condition signifies that a document is to be removed from the database
immediately.

Encumbrance
An obligation incurred in the form of a purchase order or contract. Also referred to as an open
commitment.

Endowment
Funds received by an institution from a donor who specifies the condition that the principal not be spent.

Endowment Income
The income generated by investing the principal of an Endowment Fund.

Entry Code
The initial three-digit code on a transaction that denotes the transaction type. This code, which is
mandatory for all FRS transactions, is predefined by the system. It is also known as the Transaction Code.

Expended
Depleted, used up.

Expense
Cost, disbursement, payments.

Feed
Transactions from other systems that are transferred to the FRS.

Field
That part of a control record, transaction or established for displaying or entering information.
Appendix – Glossary (cont’d)

**File**
A storage area established within a computer system or database for organizing similar kinds of data.

**Financial Accounting (FA)**
A Financial Records System application that balances the General and Subsidiary ledgers while providing a complete audit trail of all transactions.

**Financial Records System (FRS)**
A system that supports the financial record-keeping and reporting of a college or university.

**Financial Transaction**
An entry made to the system to record information.

**Flag**
A data element used to set controls or conditions on a process or program.

**Freeze Flag**
A data element whose condition signifies that new transactions cannot be posted. This includes no feeds or invoice postings for this document.

**FRS**
See Financial Records System.

**Fund**
An accounting entity (a 6-digit GL account) with a self-balancing set of 10-digit accounts for recording assets, liabilities, a fund balance and changes in the balance.

**Fund Balance**
The equity of a fund (the difference between assets and liabilities).

**Fund Group**
A related collection of funds (6-digit GL accounts). Examples include Current Unrestricted, Current Restricted, Loan, Endowment, Annuity and Life Income, Plant, and Agency.

**Fund Group ID**
A one-digit identification number representing the fund group with which an account is associated.

**Fund Transfer**
A movement of dollars from one fund balance to another.

**General Ledger (GL)**
A balance sheet account for the institution. All GL account numbers begin with “0” (zero).

**GL**
See General Ledger.

**GL/SL Relationships**
User-defined structures relating Subsidiary Ledger (SL) revenue/expense accounts to General Ledger (GL) fund accounts.

**Global Subcode Edit (GSE)**
A system edit that checks each new 10-digit account against a table that specifies valid combinations of 6-digit accounts and subcodes.

**GSE**
See Global Subcode Edit.
Appendix – Glossary (cont’d)

H

Header
That portion of a Purchasing document containing basic information such as the document’s number, the date and amount.

HEAF
Indicates a Higher Education Assistance Fund code number.

HELP
An online feature which accesses PREDICT in order to supply descriptions, valid values and suggested actions.

I

IDT
Interdepartmental Transfer.

Indirect Updating
The automatic posting of real dollar activity to a GL Balance Sheet account as a result of a direct transaction.

Inquiry Screen
A screen which only displays information and cannot be used for entering data.

Interface
A communication link between data processing systems or parts of systems that permits sharing of information.

Interfund Borrowing
The transfer of an asset or liability from one fund to another.

J

JCL
See Job Control Language.

Job Control Language (JCL)
A problem-oriented language, used in IBM that expresses the statements of a processing job. It is also used to identify the job or describe its requirements, usually to an operating system.

Journal Entry
A non-cash transfer of dollars between two or more accounts.

L

Ledger
A collection of account records for an organization. FRS contains two ledgers: the GL (balance sheet) and the SL (revenue and expense). See also General Ledger and Subsidiary Ledger.

Liability Account
In AP, a GL account that is credited for the liability when a voucher is processed. Any GL account that accepts a transaction creating a liability.

Liquidate
Reduce encumbrance through payment; pay off debt.
Appendix – Glossary (cont’d)

**M**

Map Code
A five-digit attribute code in an SL account indicating the GL Fund ID to which it relates.

Memo Bank Account
An account that represents the balances of demand deposits for operating accounts.

Menu
A screen containing a list of available processes, screens or other menus.

**N**

Name Rotation
A feature that allows users to print a vendor name in one format on checks and then rotate it to another format for sorting on reports.

**O**

Object Code
A four-digit number identifying specific items of revenue/expense or attribute records.

Open Commitment
An encumbrance.

**P**

Parameter
A variable that is assigned a constant value for a specific purpose or process. It provides the user with defined choices for report selection, processing or output requirements.

**R**

Receipts
Cash received from cash assets, collections on account receivable and sale of other assets. The purpose is to record money received by the institution to the GL, SL and SA or bank accounts.

Recommendation
The budget projection version that is submitted to the Budget Office for approval.

Regular Order
A type of purchase order that denotes a typical order.

Remit-To Address
The address to which the check for goods and/or services rendered will be sent.

Requisition
A type of document that internally requests goods and/or services to be acquired. It must be authorized before being converted to a purchase order.

Retention Months
A data element defined when creating a vendor. This indicates the number of months a vendor is to be maintained on file after all outstanding items have been paid or reconciled.

Revenue
Income or receipts.

Run Parameter
A parameter from a control record or a program control transaction (as opposed to a file maintenance transaction).
6-Digit Account
For GL: An entity that consists of a self-balancing set of 10-digit accounts.
For SL: An entity of revenues and/or expenses

Screen HELP
An on-line feature that assists the user with data entry by providing information on the purpose and operation of a particular screen.

Secondary Vendor
The vendor record holding the multiple addresses that are used periodically, as opposed to the primary address.

Session
A control mechanism to track real-time posting of a group of financial transactions in order to provide an audit trail.

SL
See Subsidiary Ledger.

Split Encumbrance
An encumbrance which applies to several accounts.

Standing Order
A type of purchase order used for (recurring) services like those provided by the telephone and electric companies.

Subcode
Four digits appended to the account ID to identify attributes and dollar records within an account.

Submit
The process that attached a budget version to a budget account as a budget of an account.

Submitted Version
Version of the budget submitted for approval as the official budget of an account.

Subsidiary Ledger
Revenue and expenditure accounts for the institution. All SL account numbers begin with a ledger number of 1 through 9.

Suspense Account
A GL clearing account reflecting real dollar activity directed to the Suspense File.

1099 Vendor
A vendor (usually a consultant or professional service hired by an institution) whose payments must be reported to the IRS on Form 1099.

1099 Voucher
A voucher that must be reported to the IRS on Form 1099.

10-Digit Account
The six-digit account ID combined with the four-digit subcode, i.e. an account control or object code.
Appendix – Glossary (cont’d)

**Tax Code**
A code that identifies a record in the PO Tax Table (for the Purchasing System) and in the Tax Currency Table (for Accounts Payable). The code must be the same for both tables. This record contains the tax percentage and the tax liability account to be used.

**Tax ID**
A Social Security Number or Federal Employer Identification Number that is available for 1099 report preparation.

**Taxes**
An additional charge on the acquisition of goods that is imposed by the taxing authority and should be paid with the invoice.

**Temporary Vendor**
A vendor from whom only one purchase or service is required. No further transactions, for this vendor, are expected.

**Transaction Code**
A three-digit code that uniquely identifies a transaction type and determines editing criteria and dollar fields to be updated.

**U**

**Update Screen**
A screen that allows a user to enter data for updating the files.

**V**

**Valid Value**
A value of a data element that has been defined for input.

**Value-Based**
A mechanism used to restrict operator access to information by comparing operator security authorization with the value stored in the field.

**Vendor**
A provider of goods and/or services.

**Vendor Addresses**
See Order-From Addresses and Remit-To Addresses.

**Vendor Automatic**
A feature that automatically assigns a specific Number Assignment to the vendor on the Action/Context Line.

**Vendor Commodity**
A good or service purchased from a specific vendor.

**Vendor File**
A record of all attributes, dollar data, and control information for all vendors.

**Version**
Account Budgets created by departments. These can later be submitted as the budget recommendation for the account. Once a version is locked, it will be called a “secure version” and can never again be changed.