Bids and Commodities User Manual

Version 4.4
March 2014

FAMIS Services
The Texas A&M University System

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:

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	The Texas A&M University System
	1144 TAMU
	College Station, TX 77843-1144
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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

```
 M41 Commodity and CMBL Bidders                          11/04/13 10:04
                                                         FY 2014 CC 02
    Screen: ___

    * ---------- Commodities ---------- *    * --Central Master Bidders List - *

    451  Create/Maint Commodity Master      452  Bidder Create/Maintain
    458  Commodity Alias Maint              453  Bidder Multiple Comm. Maint.
                                            454  Bidder Flag Maintenance

                                            455  Copy State Bidder Commodities
                                            456  Copy FAMIS Vendor to Bidder
                                            457  Copy Bidder to FAMIS Vendor
                                            459  Copy HUB to Bidder
    * ---------- Inquiry ------------- *    * --------- Inquiry --------------?

    460  Name Search List of Commodities    463  Commodities by Bidder
    461  List Commodities By Number         464  Bidders by Commodity




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

Menu M42 - Bids and Bid Lists Menu

```
 M42 Bids and Bid Lists Menu                             11/04/13 10:04
                                                         FY 2014 CC 02
    Screen: ___

    * --- Bid Documents --- *               * --- Bid List Maint. --- *
    410  Header Create/Modify               420  Master List Create
    411  Shipping & Text                    421  Copy Master to Specific
    412  Additional Text                    422  Specific List Create
    413  Bid Sole Source                    423  List Vendor Modify
    414  Item Create/Modify                 424  List Header Maintenance
    415  Item Desc. Cont'd                  426  Copy Specific to Specific
    416  Document Close                     428  List Flag Maintenance
    417  Transfer                           430  Spec List Response
    418  Flag Maintenance
    419  Bid Notes

    216  Bid On-demand Print                456 Copy FAMIS to Bidder
                                            457 Copy Bidder to FAMIS Vendor




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

Menu M44 - Bid List Inquiry Menu

```
 M44 Bid List Inquiry                                  11/04/13 10:05
                                                       FY 2014 CC 02
   Screen: ___

                         * ---- Master List Inquiry -------- *

                         480  Master List Browse
                         481  Master List Browse by Commodity

                         497  Master List Bidders


                         * --- Specific List Inquiry ------- *

                         485  Specific List Browse
                         486  Specific List Browse by Open Date/Time
                         487  Specific List Browse by Buyer/Date/Time
                         488  Specific List Browse by Comm/Date/Time

                         498  Specific List Bidders

 Enter-PF1---PF2---PF3---PF4---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)

CMBL Load
(State Bidder File)

Screen 452
(Local Bidder File)

Screen 451
(Local Commodity File)

Screen 456
(Copy Vendor to Bidder)

COMMODITY FILE

BIDDER FILE
(Bid Vendors)

CMBL Load
(State Commodity Relations File)

Screen 453
(Local Commodity Relations File)

BIDDER/COMMODITY
RELATIONSHIP 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\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:

```
 257 Req. Line Item Copy/Transfer                        01/17/07 12:03
                                                         FY 2007 CC 02
   Screen: ___ Doc: R000018 Item: _____      From Vndr:
                                              To Vndr:
   New  Class: _  Doc: B0_____  FY: 2007 Cat.: __ Vndr: _____ Dt: _____
   or
 Exist  Class: _ Doc: _____
   -------------------------------------------------------------------------
 Header Screen: _      Document has    6 items, including text and deleted items
                                                                         Proc
 Func Item   ----- Desc ------    Quantity    Unit Price  UOM   Ext. Price  Cd
   _     1.0  KNUCKLE COVERLET       48.00        6.1000  BOX       292.80  X
   _     2.0  LENKO TAPE P #855       6.00      180.0000  CS       1080.00  X
   _     3.0  GATORADE              850.00       15.5000  CS      13175.00  X
   _     4.0  GATORADE - BAG-N-     240.00       15.5000  CS       3720.00  X
   _     5.0  ALOE VERA GEL          40.00       30.9400  GAL      1237.60  X
   _     6.0  ALOE AID - 4 OZ        12.00        3.6300  EA         43.56  X
   _
   _
   _
   _
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Hmenu Help  EHelp                                              Warns
```

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:

```
410 Bid Header Create/Modify                          01/17/07 12:04
                    NOTES                            FY 2007  CC 02
  Screen: ___ Doc: B000003
                       Doc. Year: 2000      Total Amount: 19548.96
          << Dates >>
Document: 03/16/1999   Cat.: RO User Ref: 300090-1865___   St Req: _____
Required: 05/01/1999   Contact Person: MARK MASON_____ Ph: 409-555-3333
Start   : 09/01/1999   Buyer:  SDR      CARLA C CARLSON     Ph: 409-888-2222
End     : 08/31/2000   Research (Y/N): N  Type Funds: L    Type Order: LOC_
Change  : _____   No.     Print Doc? _  04/20/1999
Opening : 04/29/1999   Time: 02:00 PM       Dept: ATHL_   SubDept: _____
Doc Summary: 1999-2000 TRAINING ROOM SUPPLIES_____
Bid List: B000003_____
Sole Source (Y/N): N  Emergency(Y/N): N  Catalogue Order(Y/N): N
                      << Suggested Vendors >>
Vn ID: 1vvvvvvvvv0 or FEI: _____    Vn ID: 1vvvvvvvvv1 or FEI: _____
      ALERT SERVICES INC_____        A-ATHLETIC AND MEDICAL SUPPLY_
Addr: PO BOX 1000_____    Addr: PO BOX 30000_____
      SAN MARCOS TX 78667_____        HOUSTON TX 77249-0000_____
      _____        _____
  PH: 210-777-3333 FAX: 210-333-1111    PH:           FAX: 713-888-7777
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next        SResn EResn Notes AdVen AdDpt
```

Screen 411 –

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

Example:

```
411 Bid Shipping and Text                            01/17/07 12:05
                                                    FY 2007  CC 02
  Screen: ___ Doc: B000003

  Ship To     Address Nbr: ___          Invoice To     Address Nbr: 694
  Name: KYLE FIELD STADIUM_____   Name: ATHLETIC ACCOUNTING OFFICE____
  Addr: ATTN:   MARK MASON_____    Addr: P. O. BOX 30000_____
        _____          _____
        _____          _____
        _____          _____
  City: COLLEGE STATION_____  State: TX  City: COLLEGE STATION_____  State: TX
   Zip: 778431228   Country: ___          Zip: 778423017   Country: ___
  Phone: _____ FAX: _____  Phone: _____ FAX: _____

  Text codes:  031   054   007   044   073   012   009   080   084   095
               ___   ___   ___   ___   ___   ___   ___   ___   ___   ___
  Additional   RE-BID WITH CHANGE IN SPECIFICATIONS FOR_____
  Text Lines:  ITEM 4._____     Continued
               _____
               _____      More text
                                                                   lines: _
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next                  Notes
```

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


                               Estimated
               Quantity    UOM    Unit Price    Extended Price
               _____48.00  BOX_   _____6.1000      292.80


 Commodity: 805_____     Proc Cd: X
 Part Nbr: _____    Desc: KNUCKLE COVERLET_____
                                    100/BOX_____
                                    #01390_____
                                    _____
                                    _____
                                    _____
                                    _____
                                    _____
                                    _____
                                    _____
                                    _____
                                    _____

  More Desc (Y/N): _      More Items (Y/N): _        Print Line: Y
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Hmenu Help  EHelp          Next                    Notes
```

Screen 422 –

- You <u>must</u> 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 <u>Screen 254</u>). 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


 Sel         Bidder Name              HUB               Address
 --- ----------------------------  - ---------------------------------------
  X  S & S ATHLETICS                 N MILL ST           COLCHESTER    CT
  _
  _
  _
  _
  _
  _
  _
  _
  _


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

Bids and Commodities – Basic Concepts (cont'd)

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
                                                     FY 2007  CC AM
 > Screen: ___   Type: M   List: ELECTRICAL_____   List by Commodity: Y

   Buyer:
 Comment:
                                                 Panel: 01 More >>
   Bdr                                 Eth    Sm   Tx   Hub  Bidr
 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                     Comm  AdBdr Left  Right Warns
```

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

                                   +-------------------------+
                                   | DOC: B000003            |
                                   |                         |
                                   | USER REF: 300090-1865   |
                                   +-------------------------+



  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                   Bkwd  Fwrd
```

Screen 416 –

- Type "Y" to close bid document.

    Example:

```
416 Bid Document Close                              01/17/07 12:16
                                                    FY 2007  CC 02
  Screen: ___  Doc: B000003

          << Dates >>
Document: 03/16/1999   Cat: RO   User Ref: 3000901865     St Req:
Start   : 09/01/1999   Contact Person: MARK MASON       Ph: 409-555-3333
End     : 08/31/2000   Buyer:  SDR    CARLA C CARLSON    Ph: 409-888-2222
Required: 05/01/1999   Research (Y/N): N   Type Funds: L  Type Order: LOC
Change  :              No.      Last Print Date: 04/20/1999
                       Sole Source: N   Emergency: N


    Doc Summary: 1999-2000 TRAINING ROOM SUPPLIES

Total Amount:         19,548.96    Untransferred Total:

                      T r a n s f e r r e d

                      Close Document?  Y


  Budget Balance Override: _              Session: 1586JC   Date:
Enter-PF1---PF2---PF3---PF4--|-PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--|
       Hmenu Help  EHelp     | Next   Item  Route                      Warns  |
```

- 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
            **** Routing Document Information ****    CC AM
      Action: HLD

                  *ROUTING NOTES
```

TEXAS A&M UNIVERSITY

BID TO PURCHASE ORDER

CHECKLIST

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:

```
417 Bid Line Item Copy/Transfer                        01/17/07 12:19
                                                       FY 2007 CC 02
  Screen: ____ Doc: B000003 Item: _____     From Vndr:
                                               To Vndr:
  New    Class: P Doc: PO_____   FY: 2007 Cat.: __  Vndr: _____  Dt: _____
  or
Exist  Class: _ Doc: _____
       ----------------------------------------------------------------------
Header Screen: _       Document has    6 items, including text and deleted items
                                                                      Proc
Func Item   ----- Desc ------   Quantity     Unit Price  UOM   Ext. Price   Cd
  T    1.0   KNUCKLE COVERLET        48.00       6.1000   BOX       292.80   X
  _    2.0   LENKO TAPE P #855        6.00     180.0000   CS       1080.00   X
  _    3.0   GATORADE               850.00      15.5000   CS      13175.00   X
  _    4.0   GATORADE - BAG-N-      240.00      15.5000   CS       3720.00   X
  _    5.0   ALOE VERA GEL           40.00      30.9400   GAL      1237.60   X
  _    6.0   ALOE AID - 4 OZ         12.00       3.6300   EA         43.56   X
  _
  _
  _
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 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
                                                              FY 2007  CC 02
  Screen: ___   Doc: P600370
                       Vendor: 1vvvvvvvvvJ       Total Amount: 7964.95
           << Dates >>  Doc. Year: 2006                St. Req: _____
Document : 09/13/2005  Cat.: RO User Ref: 225720-00001__   St. Ord: _____
Required :  _____  Contact Person: WENDY WILSON_____ Ph: 979-777-9999
Start    :  _____  Buyer: LPS    SEAN SHANKS, M    Ph: 979-444-4444
End      :  _____  Research (Y/N): N   Type Funds: L   Type Order: HIED
Change   :  _____  No.    Print Doc? N  09/13/2005  PCC Code: _ _
Order    : 09/13/2005  Dept: CLED_  SubDept: _____     LDT Code: 65
  Doc Summary: SERVER FOR STREAMING MEDIA FOR ONLINE DISTANC  Cont Wk Force:
Vndr Quote #: E006582530  Vndr Ref: MARSHA MARSHALL X7233333_____
Delivry Dt: 09/27/2005  Terms: _____  ____ N  30_  FOB: DP  Ship/Handle: ___

Sole Source (Y/N): N     Emergency (Y/N): N  Cat/Order: N    Rsp
   Bidding Vendor              Vendor Contact          Cd     Bid Amount
DELL MARKETING_____  MARSHA MARSHALL_____ ___   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
```

Bids and Commodities – Basic Concepts (cont'd)

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
                                                                  FY 2007  CC 02
 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_____          4222 TAMU_____
       _____          _____
 City: COLLEGE STATION_____  State: TX   City: COLLEGE STATION_____  State: TX
  Zip: 778434222    Country: ___          Zip: 778434222    Country: ___
 Phone: _____  FAX: _____  Phone: _____  FAX: _____

 Text codes:  066    ___   ___   ___   ___   ___   ___   ___   ___
                     ___   ___   ___   ___   ___   ___   ___   ___
 Additional   EQUIPMENT PER MASTER ORDER M400329_____
 Text Lines:  _____

             _____     More text
 LDT Codes:    65   __   __  _____  __                    lines: _
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Hmenu Help  EHelp     Next                    Notes
```

Bids and Commodities – Basic Concepts (cont'd)

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:

```
 224 P.O. Line Item Create/Modify      DELL MARKETING LP            11/10/09 11:22
                                                                    FY 2010 CC 02
  Screen: ___   Doc: P600370  Item: __1.0

                   Quantity  UOM     Unit Price  -- Discount -- Extended Price
                   _____1.00 EA__  _____7964.9500 _ _____      7964.95


 Commodity: 206-23_____   Proc Cd: _ Cost Ref 1: _____  2: _____  3: _____
 Part Nbr: _____ Desc: Server, PowerEdge 2850 per_____
    TIBH: _                    Quote #: E006582530_____
                                       _____
                                       _____
                                       _____

    FY  CC  ---- Account ----  Pct.   Amt $
   2006  02  225720 00000 5787 100.00 _____
   ____  __  _____ _____ ____ _____ _____
   ____  __  _____ _____ ____ _____ _____
   ____  __  _____ _____ ____ _____ _____

 More Desc (Y/N): _    More Items (Y/N): _    Print Line: Y   Item Deleted:
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Hmenu Help  EHelp       Next                      Notes CAcct MAcct
```

INVITATION FOR BID — RETURN SEALED BIDS TO:

TEXAS A&M UNIVERSITY
DEPARTMENT OF PURCHASING SERVICES
P.O. BOX 30013
COLLEGE STATION, TX 77842-0013
PHONE 979-845-3425
FAX 979-845-3800

09/28/2001

Page   1

BIDDER MUST SIGN BELOW
FAILURE TO SIGN WILL DISQUALIFY BID

AUTHORIZED SIGNATURE _____

PRINT OR TYPE NAME _____

TITLE _____ DATE _____

SHOW OPENING DATE AND BID INVITATION NUMBER ON THE FAX COVERSHEET OR THE LOWER LEFT HAND CORNER OF THE SEALED ENVELOPE. PLEASE SHOW RETURN ADDRESS OF FIRM.

VENDOR AGREES TO COMPLY WITH ALL CONDITIONS BELOW AND ON THE REVERSE SIDE OF THIS BID.

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

BID NO: B280014

BID TO BE "F.O.B. AGENCY RECEIVING ROOM FREIGHT PREPAID AND ALLOWED" UNLESS OTHERWISE SPECIFIED BELOW

DESTINATION OF GOODS:

TEXAS ENG. EXPERIMENT STATION

COLLEGE STATION TX 77843

VENDOR ID NUMBER: _____
SEE INSTRUCTIONS 1.8 ON NEXT PAGE FOR VENDOR ID NUMBER
(__) Historically Underutilized Business certified by GSC – Please specify (__) BLK (__) HSP (__) W/O (__) A/P (__) AI

By signing this bid, bidder certifies that if a Texas address is shown as the address of the bidder, bidder qualifies as a Texas Resident Bidder as defined in Rule 1 TAC 111.2.

State law provides you the right to request, receive, review and correct information about yourself collected by this form. Contact: b.clemmons@tamu.edu or 979-845-4570 Ext. 125.

Item	Description	Quantity	UOM	Unit Price	Ext Price
	FAX BIDS/OFFERS ACCEPTED FAX # 979 845 3800. PLEASE SUBMIT BID IN DUPLICATE BIDDERS MUST BID FOB 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 RS422 OR LVDS DYNAMIC RANGE: 3200:1 RESPONSIVITY: 23DNA/(nJ/cm2)@540nm. PIXEL SIZE: 56um X 56 um APERTURE: 13.4 mm X 13.4 mm LENS MOUNT: C-MOUNT DATA RATE: 4X10 Mhz NOMINAL GAIN RANGE: 1 OR 4x SIZE: 94X94X92mm	1	EA		
LAD					

TERMS: _____ FOB DESTINATION, FREIGHT PREPAID AND ALLOWED   TOTAL _____

DELIVERY IN _____ DAYS

Check below if preference claimed under Rule 1 TAC 113.8
(__) Texas resident bidder
(__) Texas produced supplies, materials, equipment, or agricultural products
(__) USA produced supplies, materials, equipment, or agricultural products
(__) Other (See 1.13 on next page)

_____
PURCHASING AGENT FOR TEXAS A&M UNIVERSITY

INVITATION FOR BID - RETURN SEALED BIDS TO:

Page 2   09/28/2001

BID OPENING: 10/03/2001

TEXAS A&M UNIVERSITY
DEPARTMENT OF PURCHASING SERVICES
P.O. BOX 30013
COLLEGE STATION, TX 77842-0013
PHONE 979-845-3425 FAX 979-845-3800

BID NO: B280014
VENDOR:

Item	Description	Quantity	UOM	Unit Price	Ext Price
	MASS 0.85kg				
	OPERATING TEMP: 10-45 C				
	POWER SUPPLY:; +5V, -5, +15V				
	POWER DISSIPATION: 30W				
	VENDOR'S TELEPHONE NO: - -				
	VENDOR'S FAX NO: - -				

LAD

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

1. **BIDDING REQUIREMENTS**

1.1 Bidders must comply with all rules, regulations and statutes relating to purchasing in this State of Texas in addition to the requirements of this form.

1.2 Pricing must be quoted on a "per unit" basis, extended as indicated. Any trade discounts included must be itemized and deducted from extended prices. Unit Prices shall govern in the event of extension errors. Bidder guarantees product or service offered will meet or exceed specifications included as part of this Invitation for Bid.

1.3 Bids should be submitted on this form. Bids should also be submitted in duplicate. Each bid should be placed in a separate envelope completely and properly identified. Instructions on reverse side, top center. Bids must be received by the TEXAS A&M DEPARTMENT OF PURCHASING SERVICES on or before the hour and date specified for the bid opening.

1.4 When sending bids via the U.S. Postal Service, use the address on the front of this Invitation for Bid. When using a delivery service or hand delivering, which requires a street address, address is Agronomy Road, College Station, TX 77843.

1.5 Late bids will not be considered under any circumstances.

1.6 Bids should be quoted "F.O.B. destination, freight prepaid and allowed". If quoting freight otherwise, show exact delivery cost and who bears cost if not included in unit price.

1.7 Bid prices are requested to be firm for TEXAS A&M acceptance within 30 days of bid opening date. "Discount from list" bids are not acceptable unless requested. Cash discount will not be considered in determining the low bid. All cash discounts will be taken if earned.

1.8 Bids should give Vendor ID Number, full name and address of bidder (enter in the block provided if not shown). Failure to sign bid will disqualify it. Person signing bid should show the or authority to bind his or her firm in a contract. Firm name should appear on each page of a bid, in the block provided or the upper right hand corner. The Vendor ID Number is the taxpayer number assigned and used by the Comptroller of Public Accounts of Texas. Enter this number in the space provided on the front side (upper right) if it is not printed. If this number is not known, complete the following: 1. Enter your Federal Employer Identification Number; 2. Sole owner should also enter Social Security Number.

1.9 Bid cannot be altered or amended after opening time. Any alterations made before opening time should be initialed by bidder or authorized agent of bidder. No bid can be withdrawn after opening time without approval by the TEXAS A&M DEPARTMENT OF PURCHASING SERVICES based on a written acceptable reason.

1.10 Purchases made for TEXAS A&M use are exempt from the State Sales tax and Federal Excise tax. Do not include tax in bid. Enclose tax Exemption Certificate will be furnished by TEXAS A&M upon request.

1.11 TEXAS A&M reserves the right to accept or reject all or any part of any bid, waive minor technicalities and award the bid to best serve the interests of the State.

1.12 Consistent and conducive to bidding could cause rejection of bids by TEXAS A&M and/or investigation for antitrust violations.

1.13 Other preferences as defined in Rule 1 TAC 113.6 (check any that are applicable)
☐ Products of persons with mental or physical disabilities
☐ Recycled, remanufactured, or environmentally sensitive products
☐ Energy efficient products
☐ Rubberized asphalt paving material
☐ Recycled motor oil and lubricants

1.14 The telephone number for FAX submission of bids is 1-979-845-5500. This is the only number that will be used for the receipt of bids. The TEXAS A&M shall not be responsible for failure of electronic equipment or operator error. Late, illegible, incomplete, or otherwise non-responsive bids will not be considered.

2. **SPECIFICATIONS**

2.1 Any catalogue, brand name or manufacturer's reference used in the Invitation for Bids is descriptive only (not restrictive), and is used to indicate type and quality desired. Bids on brands of like nature and quality will be considered unless otherwise specified. If bidding on other than reference, bid should show manufacturer, brand or trade name, and other description of the product offered. If other than brand(s) specified is offered, illustrations and complete description of product offered are requested to be made part of the bid. If bidder takes an exception to specifications or reference data in his or her bid, bidder will be required to furnish brand names, numbers, etc., as specified in the Invitation for Bid.

2.2 All items shall be new and unused, in first class condition, including containers suitable for shipment and storage, unless otherwise indicated in Invitation for Bid. Oral agreements to the contrary will not be recognized.

2.3 All electrical items must meet all applicable OSHA standards and regulations, and bear the appropriate listing from UL, FMRC or NEMA.

2.4 Samples, when requested, must be furnished free of expense to TEXAS A&M. If not destroyed in examination, they will be returned to the bidder, upon request, at bidder's expense. Each sample should be marked with bidder's name and address, and TEXAS A&M bid number. Do not enclose in or attach bid to sample.

2.5 TEXAS A&M will not be bound by any oral statement or representation contrary to the written specifications of this Invitation for Bid.

2.6 Manufacturer's standard warranty shall apply unless otherwise stated in the Invitation for Bid.

3. **TIE BIDS** - In case of tie bids, the award will be made in accordance with Rule 1 TAC Section 113.6 (b) (3) and 113.6 (preferences).

4. **DELIVERY**

4.1 Bid should show number of days required to place material in receiving agency's designated location under normal conditions. Failure to state delivery time obligates supplier to complete delivery in 14 calendar days. Unrealistically short or long delivery promises may cause bid to be disregarded.

4.2 If delay is foreseen, supplier shall give written notice to TEXAS A&M. TEXAS A&M has the right to extend delivery date if reasons appear valid. Default in promised delivery (without accepted reasons) or failure to meet specifications authorizes TEXAS A&M to purchase supplies elsewhere and charge full increase, if any, in cost and handling to defaulting sup.

4.3 No substitutions or cancellation permitted without written approval of the TEXAS A&M DEPARTMENT OF PURCHASING SERVICES.

4.4 Delivery shall be made during normal working hours only, unless prior approval for late delivery has been obtained from TEXAS A&M.

5. **INSPECTION AND TESTS** - All goods will be subject to inspection and test by TEXAS A&M to the extent practicable at all times and places. Authorized TEXAS A&M personnel shall have access to any supplier's place of business for the purpose of inspecting merchandise. Tests shall be performed on samples submitted with the bid or on samples taken from regular shipment. In the event products tested fail to meet or exceed all conditions and requirements of the specifications, the cost of the sample used and the cost of the testing shall be borne by the supplier. Goods which have been delivered and rejected in whole or in part may, at TEXAS A&M option, be returned to the supplier or held for disposition at supplier's risk and expense. Latent defects may result in revocation of acceptance.

6. **AWARD OF CONTRACT** - A response to an Invitation for Bid is an offer to contract with TEXAS A&M based upon the terms, conditions and specifications contained in the Invitation for Bid. Bids do not become contracts until they are accepted and an authorized purchase order is issued. The contract shall be governed, construed and interpreted under the laws of the State of Texas.

7. **PAYMENT** - Supplier shall submit one copy of an itemized invoice showing order number and agency purchase order number. TEXAS A&M will incur no penalty for late payment if made in 30 or fewer days from receipt of goods or services on an uncontested invoice.

8. **PATENTS OR COPYRIGHTS** - The supplier agrees to protect TEXAS A&M from claims involving infringement of patents or copyrights.

9. **SUPPLIER ASSIGNMENTS** - Supplier hereby assigns to purchaser any and all claims for overcharges associated with this contract which arise under the antitrust laws of the United States 15 U.S.C.A. Section 1, et seq. (1973), and which arise under the antitrust laws of the State of Texas, TEX. Bus. & Comm. Code Ann. Sec. 15.01, et seq. (1967). Inquiries pertaining to bid invitations must give bid number, and opening date.

10. **BIDDER AFFIRMATION** - Signing this bid with a false statement is a material breach of contract and shall void the submitted bid or any resulting contracts, and the bidder shall be removed from all bid lists. By signature hereon affixed, the bidder hereby certifies that:

10.1 The bidder has not given, offered to give, nor intends to give at any time hereafter any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor, or service to a public servant in connection with the submitted bid.

10.2 The bidder is not currently delinquent in the payment of any franchise tax owed the State of Texas.

10.3 Pursuant to Section 2155.004 Government Code, relating to collection of state and local sales and use taxes, the bidder certifies that the individual or business entity named in this bid is not ineligible to receive the specified contract and acknowledges that this contract may be terminated and/or payment withheld if this certification is inaccurate.

10.4 Neither the bidder nor the firm, corporation, partnership or institution represented by the bidder, or anyone acting for such firm, corporation or institution has violated the antitrust laws of this State, codified in Section 15.01, et seq., Texas Business and Commerce Code, or the Federal Antitrust Laws, nor communicated directly or indirectly the bid made to any competitor or any other person engaged in such line of business.

10.5 The bidder has not received compensation for participation in the preparation of the specifications for this Invitation for Bid.

10.6 The supplier shall defend, indemnify, and hold harmless the State of Texas, all of its officers, agents and employees from and against all claims, actions, suits, demands, proceedings costs, damages, and liabilities, from any acts or omissions of supplier or any agent, employee, subcontractor, or supplier of supplier in the execution or performance of this purchase order.

10.7 Bidder agrees that any payments due under this contract will be applied towards any debt, including but not limited to delinquent taxes and child support that is owed to the State of Texas.

10.8 Bidder certifies that they are in compliance with section 615.003 of the Government Code, relating to contracting with executive head of a State agency. If section 615.003 applies, bidder will complete the following information in order for the bid to be evaluated:

Name of Former Executive: _____

Name of State Agency: _____

Date of Separation from State Agency: _____

Position with Bidder: _____

Date of Employment with Bidder: _____

10.9 Bidder agrees to comply with Government Code 2155.4441, pertaining to service contract use of products produced in the State of Texas.

11. **NOTE TO BIDDERS** - Any terms and conditions attached to a bid will not be considered unless the bidder specifically refers to them on the front of this bid form.

WARNING: Such terms and conditions may result in disqualification of the bid. i.e.a. bids with the laws of a State other than Texas, requirements for prepayment, limitations on remedies, etc.

12. **TEXAS FAMILY CODE SECTION 231.006** Ineligibility to Receive State Grants or Loans, or Receive Bids or Payments on State Contracts.

(a) A child support obligor who is more than 30 days delinquent in paying child support and a business entity in which the obligor is a sole proprietor, partner, shareholder, or owner with an ownership interest of at least 25 percent is not eligible to:
(1) receive payments from state funds under a contract to provide property, materials, or services; or
(2) receive a state funded grant or loan.

(b) A child support obligor or business entity ineligible to receive payments under Subsection (a) remains ineligible until:
(1) all arrearages have been paid; or
(2) the obligor is in compliance with a written repayment agreement or court order as to any existing delinquency.

(c) Pursuant to Section 231.006 (c), Family Code, bid should include name and Social Security number of each person with at least 25% ownership of the business entity submitting the bid. Bidders that have pre-registered this information on the CISC Centralized Master Bidders List have satisfied this requirement. If not pre-registered, attach name & social security number for each person. Otherwise this information must be provided prior to contract award.

(d) "Pursuant to Section 231.006, Family Code, no child support, the bidder certifies that the individual or business entity named in this bid is not ineligible to receive the specified payment and acknowledges that this contract may be terminated and payment may be withheld if this certification is inaccurate."

(e) If a sole agency determines that an individual or business entity holding a state contract is ineligible to receive payment under Section (a) the contract may be terminated.

(f) If the certificate required under Subsection (d) is shown to be false, the vendor is liable to the state for attorney's fees, the costs necessary to complete the contract, including the cost of advertising and securing a second contract, and any other damages provided by law or contract.

Added by Acts 1995, 74th Leg., ch. 20, Sec. 1, eff. April 20, 1995. Amended by Acts 1995, 74th Leg., ch. 751, Sec. 82, eff. Sept. 1, 1995.

13. **ALTERNATIVE DISPUTE RESOLUTION**
The dispute resolution process provided for in Chapter 2260 of the Texas Government Code shall be used, as further described herein, by Texas Engineering Experiment Station, and the Vendor to attempt to resolve any claim for breach of contract made by Vendor.

(a) Vendor's claim for breach of this contract that the parties cannot resolve in the ordinary course of business shall be submitted to the negotiation process provided in Chapter 2260, subchapter B, of the Texas Government Code. To initiate the process, Vendor shall submit written notice, as required by subchapter B, to Dr. Roland Haden. Said notice shall also be given to all other representatives of Texas Engineering Experiment Station and Vendor otherwise entitled to notice under the parties' contract. Compliance by Vendor with subchapter B is a condition precedent to the filing of a contested case proceeding under Chapter 2260, subchapter C, of the Texas Government Code.

(b) The contested case process provided in Chapter 2260, subchapter C, of the Texas Government Code is Vendor's sole and exclusive process for seeking a remedy for any and all alleged breaches of contract by Texas Engineering Experiment Station if the parties are unable to resolve their disputes under subparagraph (A) of this paragraph.

(c) Compliance with the contested case process provided in subchapter C is a condition precedent to seeking consent to sue from the Legislature under Ch. 107 of the Civil Practices and Remedies Code. Neither the execution of this contract by Texas Engineering Experiment Station nor any conduct of any representative of Texas Engineering Experiment Station thereafter shall be considered a waiver of sovereign immunity to suit.
(1) The submission, processing, and resolution of Vendor's claim is governed by the published rules as adopted by the Office of the Attorney General of the State of Texas pursuant to Chapter 2260 as currently effective, hereafter enacted or subsequently amended.
(2) Neither the occurrence of an event nor the pendency of a claim constitutes grounds for the suspension of the performance by Vendor, in whole or in part.
(3) The designated individual responsible on behalf of Texas Engineering Experiment Station for examining any claim or counterclaim and conducting any negotiations related thereto, as required under 2260.052 of the Texas Government Code shall be Dr. Roland Haden.

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.

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 <u>Screen 410</u> 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 <u>Screen 410</u>.

Screen 410 - Bid Header Create/Modify

```
 410 Bid Header Create/Modify                              03/06/14 16:02
                                                          FY 2014  CC 02
  Screen: ___ Doc: B300002
                     Doc. Year: 2013       Total Amount: 40802.13
           << Dates >>
 Document: 07/31/2012   Cat.: BU User Ref: 270590-0000___   St Req: _____
 Required: _____   Contact Person: ANN ANDREWS_____ Ph: 979-845-7777
 Start   : 09/01/2012   Buyer: CKA ASH, ANGELA    SRS:    Ph: 979-845-3333
 End     : 08/31/2013   Research (Y/N): Y   Type Funds: L   Type Order: HIED
 Change  : _____   No.     Print Doc?  Y
 Opening : _____   Time: 02:00 PM        Dept: LAAR_   SubDept: _____
 Doc Summary: ANIMAL FEED & BEDDING_____
 Bid List: _____
 Sole Source (Y/N): Y  Emergency(Y/N): N  Catalogue Order(Y/N): N
                        << Suggested Vendors >>
 Vn ID: _____ or FEI: _____    Vn ID: _____ or FEI: _____
        _____         _____
 Addr: _____   Addr: _____
        _____         _____
        _____         _____
   PH: _____ FAX: _____    PH: _____ FAX: _____
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Hmenu Help  EHelp       Next       SResn EResn Notes AdVen AdDpt
```

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 <u>Screen 854</u>, but you may view them using <u>Screen 855</u> (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

```
   855 Type/Prefix Display                              03/06/14 16:05
                                                        FY 2014 CC 02
    Screen: ___  Fiscal Year: 2014  Type: _____


                              Next     Last    Number of
       Type          Fy  Prfx Doc.     Number   Records  Class   Description

    ASSET TRANSFER   2014  N   400923   401422    500            TRNS DEPT PROPE
    BID              2014  B   400055   400555    500       B    BIDS
    BID              2014  C   400001   400501    500       B    CATALOGUE ORDER
    DEPT BUDGET      2014  U   405509   405708    200            DEPT BUDGET REQ
    DEPT CORRECT     2014  J   406697   407196    500            DEPT CORRECT RE
    EXEMPT PURCH     2014  E   411860   412357    500       E    EXEMPT PURCHASE
    INVOICE PROBLEM  2014  I   400040   400339    300            INVOICE PROB (P
    LIMITED PURCH    2014  A   400001   400501    500       L    LIMITED PURCHAS
    LIMITED PURCH    2014  L   401633   403633   2000       L    LIMITED PURCHAS
    LIMITED PURCH    2014  Z   400001   401001   1000       L    LIMITED PURCHAS
    MASTER ORDER     2014  M   400010   400109    100       M    MASTER ORDERS
    PURCHASE ORDER   2014  D   400001   400101    100       P    PHYS PLANT ORDE



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

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            | |
| |                                                            | |
| |                Dept           SubDept        CC            | |
| |                INRE_          _____         01            | |
| |                _____         _____         __            | |
| |                _____         _____         __            | |
| |                _____         _____         __            | |
| |                _____      Press <PF4> to Exit             | |
| +------------------------------------------------------------+ |
+----------------------------------------------------------------+
```

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.

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.

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.

◆ **Catalogue**   1 character
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.

Vn ID: 11 digits
                          Enter the FAMIS Vendor Identification Number.

-OR-
FEI: 9 digits
                          Displays the vendor's Federal Employer Identification number.

Addr: 30 digits/characters, 3 lines
                          Displays the vendor's address.

PH: 10 digits
                          Shows the vendor's phone number.

FAX: 10 digits
                          Displays the fax number for the vendor.

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

```
 411 Bid Shipping and Text                                     11/18/10 14:38
                                                              FY 2011  CC 02
   Screen: ___  Doc: B100187

   Ship To      Address Nbr: 099          Invoice To      Address Nbr: 099
   Name: PETROLEUM ENGINEERING DEPART._   Name: PETROLEUM ENGINEERING DEPART._
   Addr: J.C. RICHARDSON BLDG.-RM 401__   Addr: J.C. RICHARDSON BLDG.-RM 401__
         _____            _____
         3116 TAMU_____            3116 TAMU_____
         _____            _____
   City: COLLEGE STATION_____  State: TX  City: COLLEGE STATION_____  State: TX
    Zip: 778433116    Country: __          Zip: 778433116    Country: __
   Phone: _____  FAX: _____  Phone: _____  FAX: _____

   Text codes:  107    ___   ___   ___   ___   ___   ___   ___   ___   ___
                ___   ___   ___   ___   ___   ___   ___   ___   ___   ___
   Additional    TEXAS A&M UNIVERSITY IS REQUESTING BIDS FOR__
   Text Lines:   AVS-200, ACOUSTIC VELOCITY SYSTEM FOR THE____        Continued
                 PETROLEUM ENGINEEERING DEPARTMENT PER THE____
                 FOLLOWING SPECIFICATIONS, TERMS AND_____     More text
                                                                   lines: _
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Hmenu Help  EHelp       Next                    Notes
```

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.

```
+-----------------------------------------------------------+
| More Text Codes - Select or Press <ENTER> to scroll       |
|                                                           |
|  Search Criteria:     Text Code: ___    Drop: N           |
|                                    Selected    of 18      |
|    Code       Description                         Drop    |
|  _  001   DELIVERY MAY BE A FACTOR IN THE AWARD.     N    |
|  _  002   IF QUOTING OTHER THAN SPECIFIED, BIDDERS        |
|  _  003   BIDDERS MUST GIVE ESTIMATED DELIVERY       N    |
|  _  004   BULK PACKAGING AND SINGLE SHIPMENT ARE         |
|  _  005   VENDOR MAY BE REQUESTED TO SUBMIT A        N    |
|  _  006   ONCE THE ORDER IS PLACED, SUBSTITUTIONS        |
|  _  007   TEXAS A&M UNIVERSITY RESERVES THE RIGHT        |
|  _  008   LENGTH OF DELIVERY TIME MAY BE A FACTOR    N    |
|  _  009   ATTENTION: DO NOT USE THIS TEXT CODE, UNABLE   |
|  _  010   NO SUBSTITUTION OF MANUFACTURER WILL BE    N    |
|  _  011   PRESENT CONTRACT WILL BE IN EFFECT         N    |
|  _  012   UNACCEPTABLE PERFORMANCE BY VENDOR MAY         |
|                                                           |
|  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:

Help 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:**

Help 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:

Help 3 characters

Include the country code for the delivery address. **Filled in automatically if an Address Nbr: is specified.**

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:
Help 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:**
Help 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:
Help 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:
Help 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.

More text   1 character
lines: Type "Y" to add additional lines of text on <u>Screen 412</u> (99 lines available).

<u>Additional Functions</u>

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

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

PF9   **Notes**
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

```
   414 Bid Line Item Create/Modify                           11/18/10 14:42
                                                             FY 2011 CC 02
     Screen: ___   Doc: B100183  Item: __1.0


                                   Estimated
                     Quantity    UOM     Unit Price    Extended Price
                    _____1.00   LOT_   ____19000.0000      19000.00

   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___
                                     _____
                                     _____

     More Desc (Y/N): _      More Items (Y/N): _          Print Line: Y
    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.

◆ **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   16 digits
   Price:**   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**
Next   Advances to next screen - Screen 416.

PF9   **Notes**
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

```
   416 Bid Document Close                                   11/18/10 14:42
                                                            FY 2011  CC 02
    Screen: ___ Doc: B100183

           << 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

                          C l o s e d

                          Close Document?  N

    Budget Balance Override: _                Session: 1586JC   Date:
   Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
          Hmenu Help  EHelp       Next  Item  Route                        Warns
```

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
                       Identifies 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.

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

Buyer: 3 characters
Displays the initials of the buyer for the purchase.

Ph: 10 digits
Indicates the area code and phone number of the buyer for the bid document.

Required: 8 digits
Displays the date by which the requested order is required.

Research (Y/N): 1 character
"Y" indicates the purchase items are intended for research purposes.

Type Funds: 1 character
Identifies the type of bidder: State (S) or local (**L**) to be used for the purchase of the requested item(s).

Type Order: 4 characters
Indicates the type of order to be placed for the requested items.

Change: 8 digits
Identifies the date the last change was made to the bid document.

No.:   3 digits
Shows the number of changes that have been processed by the system.

Last Print Date: 8 digits
Indicates the date the document was last printed.

Sole Source: 1 character
"Y" indicates the merchandise requested is a sole source item.

Emergency: 1 character
"Y" identifies this is an emergency purchase.

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

Total Amount: 17 digits
Identifies the total dollar amount required for purchase of the requested items.

Untransferred Total: 17 digits
Shows the total dollar amount that has not been transferred to a purchase order.

◆ **Close Document?:** 1 character
Type "Y" to close the selected document.

Budget Balance Override:	1 character Enter "Y" if the purchase will be allowed to exceed the available budget.
Session:	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**	**Next Screen** Advances to the next screen - Screen 410 (Bid Document Header/Create Modify).
PF6 **Item**	**Item** Displays the document inquiry pop-up window to view all items for the document.
PF7 **Route**	**Route Document** Sends a closed document through the routing and approval process.
PF12 **Warns**	**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.

Screen 412 - Bid Header Text Continued

```
 412 Bid Header Text Continued                          11/18/10 14:48
                                                        FY 2011 CC 02
   Screen: ___  Doc: B100179
                                             Position at line: ___ of 74
                                             Page (F/B/E): F
    Line                   Additional Text
    1                REF 270160-16823, W/O 100831681-005, R100960_
    2                B100179, UTILITY, SME_____
    3                _____
    4                TAMU CONTACTS:_____
    5                _____
    6                 BID QUESTIONS:  PAM PAULIE_____
    7                                 979-458-2222_____
    8                                 P-PAULIE@ANY.EDU_____
    9                _____
   10                CHANGES TO THE BID MUST BE AUTHORIZED BY_____
   11                PAM PAULIE, DEPARTMENT OF PROCUREMENT_____
   12                SERVICES._____
   13                _____
   14                BIDS MUST BE SIGNED AND RETURNED ON OUR BID__
   15                FORMS. FAILURE TO DO SO SHALL RESULT IN YOUR_
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
        Hmenu Help  EHelp
```

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

Action Line

◆ **Doc:**   7 digits
                      Identify the bid document number to which you would like to add text.

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

```
   413 Bid Sole Source                                    11/18/10 14:50
                                                          FY 2011  CC 02
     Screen: ___ Doc: B100175

  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 COMMERCIALLY 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.

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**
Next Advances to the next screen - Screen 414.

PF9 **Notes**
Notes Enter notes about the bid document.

PF10 **Existing Equipment**
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

```
   415 Bid Item Description                            11/18/10 14:51
                                                       FY 2011 CC 02
   Screen: ___    Doc: B100172  Item: __1.0
                                             Position at line: ___  of  18
   Line                   Description              Page (F/B/E): F
    1                Suppy and install hose between hydraulic pump
    2                and testing equipment as per provided_____
    3                drawing._____
    4                _____
    5                Includes 1.000" ID "Kurt Tuff" hydraulic hose
    6                2900 PSI, working pressure 11,600 PSI burst._
    7                _____
    8                Vendor will supply all fittings required as__
    9                well as shut off valves shown. Vendor will___
   10                supply eight valves for shut off's at the____
   11                tees. Vendor will supply all mounting_____
   12                hardware required. Vendor will supply all____
   13                labor required for installation. Vendor will_
   14                supply air testing lines for leaks and then__
   15                hydrostatic test them to 4000 PSI._____
   16                _____
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
        Hmenu Help  EHelp
```

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.

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

Screen Information

Position at line   3 digits
___ of ___: 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.

Screen 417 - Bid Line Item Copy/Transfer

```
  417 Bid Line Item Copy/Transfer                        11/18/10 14:54
                                                          FY 2011 CC 02
   Screen: ___ Doc: B100171 Item: _____      From Vndr:
                                               To Vndr:
   New  Class: _ Doc: _____ FY: 2011 Cat.: __ Vndr: _____ Dt: _____
   or
 Exist  Class: _ Doc: _____
   -------------------------------------------------------------------------
 Header Screen: _      Document has    5 items, including text and deleted items
                                                                       Proc
 Func Item   ----- Desc ------    Quantity    Unit Price  UOM    Ext. Price   Cd
   _     0.1  *****************                                                T
   _     0.2  Blanket Order for                                               T
   _     1.0  Bus Shelter, smal      6.00      12000.0000  EA      72000.00
   _     2.0  SIX (6) LARGE 10X      6.00      20000.0000  EA     120000.00
   _     2.1  Note to Bidders:                                                T




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

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.

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.

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:

Value	Meaning
BE	Blanket Encumbered
BO	Ref. Blanket Order
BU	Blanket Unencumbered
EP	Exempt Purchases
LP	Limited Purchase
MD	Master Order (DISC)
MQ	Master Order (QTY)
RO	Regular Orders

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.

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:**   Help 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:**   Help 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.

or

Exist

◆ **Class:**   Help 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: Help 1 character
Identify the function to be performed.
T   =   Transfer item
C   =   Copy item

Item:	5 digits	
	Shows the line item number(s) on the document.	

Desc: 20 characters
Displays a description of the line item.

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

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

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

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

Proc Cd: 1 character
Identifies the processing code if the line item needs special processing or if it has been transferred to another purchase document.

Additional Functions

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

PF12 **Warnings**
Warns Displays any FAMIS warnings.

Cancel, Freeze, Reopen, Delete Flags

To cancel a bid document or delete items, you can use <u>Screen 418</u>. 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.

Screen 418 - Bid Flag Maintenance

```
 418 Bid Flag Maintenance          NO VENDOR ON DOCUMENT           11/18/10 14:56
                                                                    FY 2011 CC 02
   Screen: ___ Doc: B100173                         C l o s e d


                    Cancel / Delete Document: N

                            Freeze Document: N

                            Reopen Document: N

                            Delete all Items: N

                    Delete/Undelete Item: _____ thru Item: _____
        -------------------------------------------------------------------




   Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
         Hmenu Help  EHelp                  Track        Accts Extnd Items Warns
```

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: Help 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

```
    419 Bid Note Text                                        11/18/10 14:59
                                                             FY 2011 CC 02
    Screen: ___   Doc: B100135  Item: __0.0     T r a n s f e r r e d
                                                      Position at line: ___
      Line                     Description
      1                 >>Note entered 10/11/10 BY WIINSTON, WANITA__
      2                 BID WAS CANCELLED - NO RESPONSES WERE_____
      3                 RECEIVED - HANDLED AS AN INFORMAL QUOTE -_____
      4                 PURCHASE UNDER THE $25,000.00 MARK._____
      5                 _____
      6                 _____
      7                 _____
      8                 _____
      9                 _____
      10                _____
      11                _____
      12                _____

                                                        Page (F/B/E): _


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

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.

Screen 216 - Print Bid Document

```
 216 Print Bid Document                                10/30/13 15:25
                    C l o s e d                         FY 2014 CC 02
    Screen: ___   Start Doc: K402011   End Doc: K402011


               Print (Y/N): _              Printer: _____
               Print Dt: 10/30/13__     Reprint: _  Catalogue Only: _


              Nbr Copies: _1              Ship to: _____
                Bid List: Y            Two Forms: _
         Text Codes Last: _            Mail Code: _
          FED Text Codes: _____      Spl Output: _____
          Exclude Vndr ID: _            Print CC: _
    -------------------- Bid Document Information  ----------------------------


    Document Dt: 10/18/2013              Cat: RO   User Ref: 468551-00001
         Buyer: PPP  PRINCE, PETER       Dept: CHEM  SubDept:
     Print Doc?  N     10/18/2013  Catalogue Order: N

    Doc Summary: NCG QUEST 10 CHROMATOGRAPHY SYSTEM

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

> **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.

> _Tech notes_: to print test copy, use runlib#f05bidpr;
> to view output, see Screen 857

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.

◆ **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.

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

```
 308 Printer Maintenance                                11/18/10 15:07
                                                          FY 2011 CC 05
    Screen: ___       Type: RJE-BATCH_____

 Func   Doc. Type      Form     Destination    Copies    JDE    EFORM   Class
    _    PO FORM____   POPT__   PVAMPR1_____    1    _____  _____   _
    _    PO REPORT_    RPTS__   PVAMPR1_____    1    _____  _____   _
    _    BID FORM__    BDPT__   PVAMPR1_____    1    _____  _____   _
    _    BID REPORT    RPTS__   PVAMPR1_____    1    _____  _____   _
    _    CO FORM____   BDPT__   PVAMPR1_____    1    _____  _____   _
    _    CO REPORT_    RPTS__   PVAMPR1_____    1    _____  _____   _
    _    _____    _____   _____   _    _____  _____   _
    _    _____    _____   _____   _    _____  _____   _
    _    _____    _____   _____   _    _____  _____   _
    _    _____    _____   _____   _    _____  _____   _
    _    _____    _____   _____   _    _____  _____   _
    _    _____    _____   _____   _    _____  _____   _
    _    _____    _____   _____   _    _____  _____   _
    _    _____    _____   _____   _    _____  _____   _
                      ****************  End of Data  *****************

 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.

Doc Type: 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.

Form: 6 characters/digits
Indicate the form code defined for the print type.

Destination: 16 characters/digits
Enter the printer destination for the output. Must be a JES defined printer.

Copies: 1 digit
Type the number of copies to be printed.

JDE: 6 characters
Identify the special JDE needed for Xerox printers.

EFORM: 6 characters
Include the electronic form required for Xerox printers.

Class: 1 character
Indicate the document class used to store the document.
L   =   Limited
E   =   Exempt

Additional Functions

PF KEYS   See the Appendix for explanations of the standard PF keys.

Section III
Bid List Maintenance

Bids and Commodities User Manual   Page III-2

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.

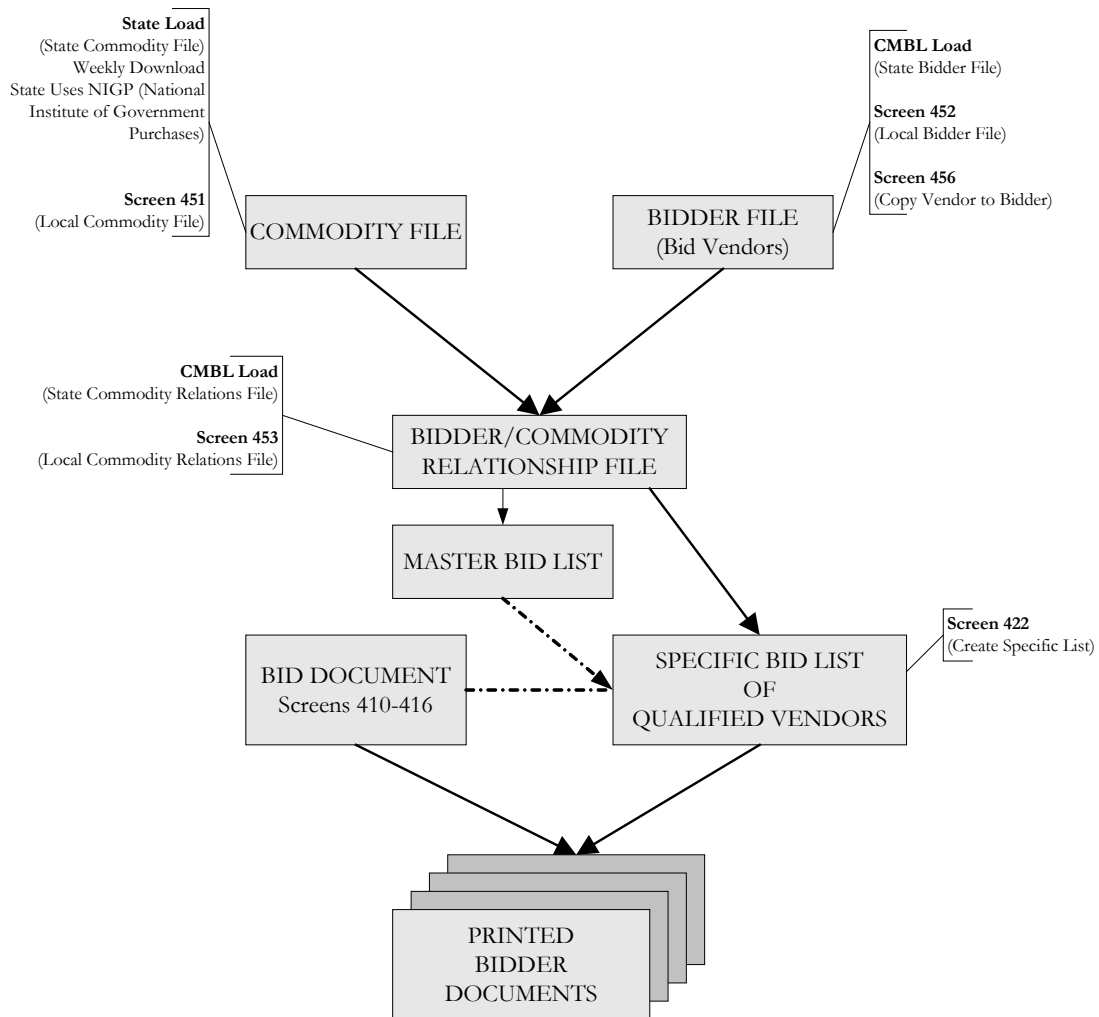There are three methods you can use to create a specific bid list. You can:

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

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)

CMBL Load
(State Commodity Relations File)

Screen 453
(Local Commodity Relations File)

BIDDER/COMMODITY
RELATIONSHIP FILE

MASTER BID LIST

Screen 422
(Create Specific List)

BID DOCUMENT
Screens 410-416

SPECIFIC BID LIST
OF
QUALIFIED VENDORS

PRINTED
BIDDER
DOCUMENTS

T:\Fa\DOC\WRKNPRCS\Student\Bid 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
              << More                                 Panel: 02
 Buyer: ___   Comment: _____
 Commodity Name: CHEMICAL LABORATORY EQUIPMENT AND SUPPLIES
                          Eth    SB          Bid    Resp              Expiration
 Sl     Bidder Name       Org Ge Fg QI St    Cnt    Cnt    Bidder ID     Date
 -- ------------------- -- -- -- -- -- ------- ------- -------------- ----------
  _ ABT ASSOCIATES                             S10xxxxxxxxx00 10/19/2010
  _ ALPINE BIOLOGICS IN                        S10xxxxxxxxx00 10/02/2010
  _ AMERICAN RESEARCH P AS  M                  S10xxxxxxxxx00 04/25/2010
  _ AMERICAN WHITE CROS                        S10xxxxxxxxx00 10/06/2010
  _ AMITOF BIOTECH INC  AS  M                  S10xxxxxxxxx00 04/25/2010
  _ BUCK SCIENTIFIC                            S10xxxxxxxxx00 10/02/2010
  _ CAMBRIDGE ISOTOPE L                        S10xxxxxxxxx00 10/19/2010
  _ CAPTAIR                                    S10xxxxxxxxx00 10/06/2010
  _ CORNING COSTAR CORP                        S10xxxxxxxxx00 10/06/2010
  _ DIATECH DIAGNOSTICS                        S10xxxxxxxxx00 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:**   Help 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:**   Help 22 characters/digits
Signify the name of the master list you would like to create or modify.

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

◆ **Type of Funds:**   Help 1 character
Identify the type of funds used for the 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.

Buyer: **Help** 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

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 master list (up to 51 bidders).

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)

```
   421 Copy Master List to Specific List                      11/18/10 13:59
                                                              FY 2011  CC AM
 > Screen: ___   To Specific List: B700006_____
 >               From Master List: FURNITUREION_____  Add to existing List: Y
                                                         Panel: 01 More >>
 Commodity: 425                   FURNITURE, OFFICE


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



 *** End of Bidders List ***
  Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Hmenu Help  EHelp            All                       Left  Right
```

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

```
   421 Copy Master List to Specific List                      01/17/07 14:00
                                                              FY 2007  CC AM
 > Screen: ___   To Specific List: B700006_____
 >               From Master List: FURNITUREION_____  Add to existing List: Y
           << More                                       Panel: 02
 Commodity: 425                   FURNITURE, OFFICE

                          Eth    SB          Bid    Resp               Expiration
 Sl     Bidder Name       Org Ge Fg QI St    Cnt    Cnt    Bidder Id      Date
 -- ------------------- -- -- -- -- -- ------- ------- -------------- ----------
    AMERICAN WHITE CROS                   1           S10xxxxxxxxx00 10/06/2010
  _ AMES COLOR FILE                       2           S10xxxxxxxxx00 09/27/2010
  _ DESIGN CONTEMPO INC                   2           S10xxxxxxxxx00 04/20/2010
  _ MODERN SCHOOL SUPPL                   1           S10xxxxxxxxx00 04/23/2010
  _ MORSE WATCHMANS INC HI  M     Y       1           S10xxxxxxxxx00 08/14/2010
  _ PHASE ONE OFFICE PR BL  M             1           S10xxxxxxxxx00 01/01/2010
  _ WRIGHT LINE INC                 Y     2           S10xxxxxxxxx03 05/31/2010



             *** End of Bidders List ***
  Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Hmenu Help  EHelp            All                       Left  Right
```

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.

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)

```
   422 Specific List Create                                11/18/10 14:02
                                                           FY 2011   CC AA
  > Screen: ___   Commodity: 175_____   Spec. List: Bxxxxx6_____
  >               District: __  Type of funds: L  Add to existing List: Y
                                                        Panel: 01 More >>
 Commodity Name: CHEMICAL LABORATORY EQUIPMENT AND SUPPLIES


 Sel         Bidder Name              HUB                  Address
 --- ---------------------------  - ---------------------------------------
   _   A A DECK CO                   811 JEFFERSON RD     ROCHESTER    NY
   _   ARTHUR BARTON                 BOX 118              KINGSVILLE   TX
   _   DOGS R WE                     444 ROVER RD         COLLEGE STATI TX
   _   DOLORES' GAMBLING SERVICES    123 LUCKY LANE       BRYAN        TX
   _   DUCKIE'S COMMODITIES UNLIMITED 909 WADDLE WAY      DUCKVILLE    TX
   _   DUCKIE'S LAB AND RESEARCH SUPP 1144 WADDLE WAY     COLLEGE STATI TX
   _   FINCH, KATHY                  17 LOON WAY          BRYAN        TX
   _   KALE INCORPORATED             445 BID DEAL LANE    NEW YORK     NY
   _   KALE, GENA                    1233 SOMEWHERE       COLLEGE STATI TX
   _   LENA CONSTRUCTION             P O BOX 1000         BRYAN        TX
                    ** 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
```

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

Screen 422 - Specific List Create (Panel 2)

```
   422 Specific List Create                                11/18/10 14:03
                                                           FY 2011   CC AA
  > Screen: ___   Commodity: 175_____   Spec. List: B700006_____
  >               District: __  Type of funds: L  Add to existing List: Y
          << More                                       Panel: 02
 Commodity Name: CHEMICAL LABORATORY EQUIPMENT AND SUPPLIES

                     Eth     SB        Bid      Resp                Expiration
 Sl    Bidder Name   Org Ge Fg QI St   Cnt      Cnt     Bidder Id      Date
 -- ------------------- -- -- -- -- -- ------- ------- -------------- ----------
  _ A A DICK CO                                         L10xxxxxxxx4AA
  _ ARTHUR BARTON                                       L12xxxxxxxx2AA
  _ DOGS R WE            AS  W  X                        L24xxxxxxxx0AA
  _ DOLORES' GAMBLING S H   F                           L24xxxxxxxx2AA
  _ DUCKIE'S COMMODITIE HI  F  Y                        L09xxxxxxxx0AA
  _ DUCKIE'S LAB AND RE                                 LA1xxxxxxxx1AA
  _ FINCH, KATHY         WO  F                          L16xxxxxxxx2AA
  _ KALE INCORPORATED                                   L24xxxxxxxx0AA
  _ KALE, GENA                                          L24xxxxxxxx0AA
  _ LENA CONSTRUCTION                                   L14xxxxxxxx0AB
                    ** 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 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

```
+---------------------------------------------------------+
|          Buyer: jmk                                     |
|        Comment: microscopes_____       |
|   Bid Document: B700001_____                        |
|                                                         |
|   Opening Date: 072205_____                             |
|   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

◆ **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).

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.

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 <u>date</u> 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.

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)

```
    426 Copy Specific List to Specific List                    11/18/10 14:04
                                                               FY 2011  CC AA
   > Screen: ___   To Specific List: B600013_____
   >            From Specific List: B700006_____ Add to existing List: Y
   >                      Commodity: 175_____
                               Name: CHEMICAL LABORATORY EQUIPMENT AND SUPPLIES
                                                             Panel: 01 More >>


   Sel        Bidder Name           HUB                  Address
   --- ---------------------------  - -------------------------------------
    _   DOLORES' GAMBLING SERVICES    123 LUCKY LANE      BRYAN        TX
    _   FITZ, CHARLES                 47 LONG WAY         BRYAN        TX
    _   LENA CONSTRUCTION             P O BOX 1000        BRYAN        TX






                      *** End of Bidders List ***
   Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
         Hmenu Help  EHelp                All                      Left  Right
```

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

```
    426 Copy Specific List to Specific List                    11/18/10 14:04
                                                               FY 2011  CC AA
   > Screen: ___   To Specific List: B600013_____
   >            From Specific List: B700006_____ Add to existing List: Y
   >                      Commodity: 175_____
                               Name: CHEMICAL LABORATORY EQUIPMENT AND SUPPLIES
               << More                                       Panel: 02
                               Eth    SB      Bid     Resp              Expiration
   Sl    Bidder Name           Org Ge Fg QI St Cnt     Cnt    Bidder Id    Date
   -- ------------------- -- -- -- -- -- ------- ------- -------------- ----------
    _ DOLORES' GAMBLING S H    F                        L2xxxxxxxxx2AA
    _ FITZ, CHARLES        WO  F                        L1xxxxxxxxx2AA
    _ LENA CONSTRUCTION             L1xxxxxxxxx2AB



                      *** End of Bidders List ***
   Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
         Hmenu Help  EHelp                All                      Left  Right
```

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: 072205_____                            |
|     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.

◆ **From Specific List:**   50 characters/digits
Indicate the name of the specific list you would like to copy from.

◆ **Add to Existing List:**   1 character
Type "Y" to add bidders to an existing specific list.

◆ **Commodity:**   20 digits/characters
Identify the commodity code of the goods or services for which you will be accepting bids.

Name: 50 characters
Displays the name of the commodity for which you will be accepting bids.

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.

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 identification number assigned to the bidder 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 **All**	**Select All Bidders** Used to select all available bidders for the list.

Modify the Bidders for a Particular List

It is possible for you 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.B500800.

Screen 423 - Bid List Bidder Modify (Panel 1)

```
   423 Bid List Bidder Modify                              11/18/10 14:06
                                                          FY 2011  CC AA
 > Screen: ___   Type: M   List: FURNITUREION_____   List by Commodity: Y

    Buyer:
 Comment:
                                                     Panel: 01 More >>
    Bdr                                    Eth     Sm   Tx   Hub  Bidr
 F Typ  Bidder Name           Commodity    Org  G  Bus  Off  St   Stat
 -- ---  ----------------------  ---------------  ---  -  ---  ---  ---  ----
  _  S    AMERICAN WHITE CROSS IN  425                              N
  _  S    AMES COLOR FILE         425                         Y    N
  _  S    DESIGN CONTEMPO INC     425                              N
  _  S    MODERN SCHOOL SUPPLIES  425                              N
  _  S    MORSE WATCHMANS INC     425         HI   M          A
  _  S    PHASE ONE OFFICE PRODUC 425         BL   M          A
  _  S    WRIGHT LINE INC         425                         Y    N

  _
  _
  _

 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Hmenu Help  EHelp                         Comm  AdBdr Left  Right Warns
```

Screen 423 - Bid List Bidder Modify (Panel 2)

```
   423 Bid List Bidder Modify                              11/18/10 14:06
                                                          FY 2011  CC AA
 > Screen: ___   Type: M   List: FURNITUREION_____   List by Commodity: Y

    Buyer:
 Comment:
                                          << More   Panel: 02
    Bdr                                  Hub    Hub       Bid    Resp
 F Typ  Bidder Id       Bidder Name      St   Expire Dt   Cnt    Cnt
 -- ---  ------------   ----------------------  ---  ----------  ------  ------
  _  S    10xxxxxxxxx00  AMERICAN WHITE CROSS IN  N   10/06/1997
  _  S    10xxxxxxxxx00  AMES COLOR FILE          N   09/27/1997
  _  S    10xxxxxxxxx00  DESIGN CONTEMPO INC      N   04/20/1998
  _  S    10xxxxxxxxx00  MODERN SCHOOL SUPPLIES   N   04/23/1998
  _  S    10xxxxxxxxx00  MORSE WATCHMANS INC      A   08/14/1996
  _  S    10xxxxxxxxx00  PHASE ONE OFFICE PRODUC  A   01/01/1997
  _  S    10xxxxxxxxx03  WRIGHT LINE INC          N   05/31/1998

  _
  _
  _

 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Hmenu Help  EHelp                         Comm  AdBdr Left  Right Warns
```
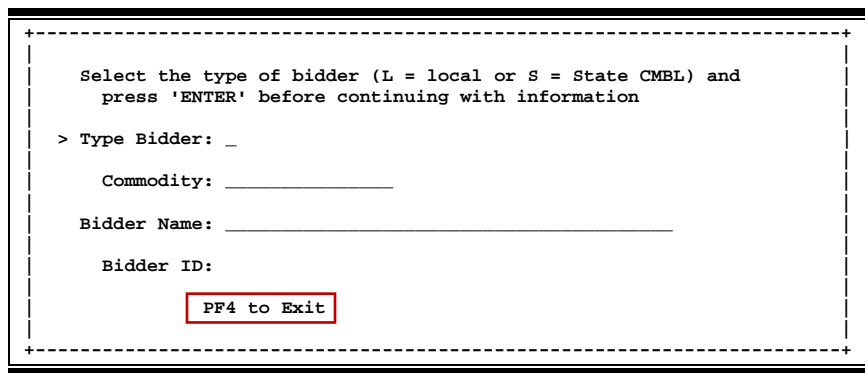
Basic Steps

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.

```
+--------------------------------------------------------------------+
|                                                                    |
|        Select the type of bidder (L = local or S = State CMBL) and |
|          press 'ENTER' before continuing with information          |
|                                                                    |
|   > Type Bidder: _                                                 |
|                                                                    |
|        Commodity: _____                                 |
|                                                                    |
|      Bidder Name: _____     |
|                                                                    |
|        Bidder ID:                                                  |
|                                                                    |
|               PF4 to Exit                                          |
|                                                                    |
+--------------------------------------------------------------------+
```

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:
Help 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 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

```
   424 Bid List Header Maintenance                          11/18/10 15:19
                                                            FY 2011   CC AM
 > Screen: ___   Type: S  List: B600003_____

               Buyer: DDD
            Comments: _____

   ----------------------  Specific Bid Lists Only  ------------------------

   Bid Document: B600003
   Opening Date: 01/03/2006
   Opening Time: 02:31 PM

   -------------------------- Commodity Codes ----------------------------
                               Enter 'D' to Delete
    _ 175




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

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.

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**   1 character
Delete: 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 <u>Screen 428</u>. A bid list may be deleted or frozen from further activity using this screen.

Screen 428 - Bid List Flag Maintenance

```
   428 Bid List Flag Maintenance                          11/18/10 15:20
                                                          FY 2011 CC AM
 > Screen: ___   Type List: S  List: B800002_____


                  B800002

          Buyer: DDD   DORIANNA DENNISON
          Comment:

                          N Delete Bid List

                          N Freeze Bid List




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

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.

◆ **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 <u>Screen 430</u> 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

```
   430 Bid List Response                              11/18/10 15:22
                                                      FY 2011  CC 02
 > Screen: ___   List: B000130_____   Buyer: AAA  ALLISON, ANNIE

 F Resp Commodity        Type Bidder ID      Bidder Name                   Stat
 -- ---- -------------- ---- ------------- ----------------------------- ----
   _    _  988-36_____   S   1xxxxxxxxxxx0 A LAWN AND LANDCARE SERVICES C
                                                _____
   _    _  988-36_____   L   1xxxxxxxx0AC  ABB PEST & LAWN SERVICES
                                                _____
   _    _  988-36_____   S   1xxxxxxxxxxx0 ALCORE LANDSCAPING            D
                                                _____
   _    _  988-36_____   S   1xxxxxxxxxxx0 BIE LANDSCAPE & MAINTENANCE
                                                _____
   _    _  988-36_____   S   1xxxxxxxxxxx0 ELAN TURFCARE GROUP, LLC
                                                _____
   _    _  988-36_____   S   1xxxxxxxxxxx0 INNER TREE CARE & LANDSCAP  D
                                                _____
   _    _  988-36_____   S   1xxxxxxxxxxx0 L&L LANDSCAPE SERVICES, INC.
                                                _____

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

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:**   Help 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 **Commodities**
Comm Used to display the names of the goods and services on the bid document.

Section IV
Bid List Inquiry

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 <u>Screen 480</u> 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 <u>Screen 480</u>. Press <ENTER> to scroll through the names displayed.

Screen 480 - Master List Browse

```
   480 Master List Browse                           11/18/10 15:25
                                                     FY 2011  CC 02

    Screen: ___  Master List: _____

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

             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 <u>Screen 497</u> to view the bidders for the list.

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

Action Line

Master List: **Help** 20 characters
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 <u>Screen 497</u>.

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

```
   481 Master List Browse by Commodity                  11/18/10 15:26
                                                        FY 2011  CC 02
 > Screen: ___   Commodity: 359_____
 >             Master List: _____

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


              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: Help 15 characters
                       Enter the desired commodity code number to display available master lists.

Master List: Help 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.

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

Commodity:
15 digits
Indicates the commodity code associated with the master list.

Commodity Name:
15 characters
Displays the full name of the commodity associated with the master list.

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

St:
1 character
Indicates whether or not the list's status has been frozen (F) or deleted (D) from further activity.

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)

```
  497 Master List Bidders                                   11/18/10 15:28
                                                            FY 2011  CC 02
 > Screen: ___   List: CARPET_____
 >               Bidder: PDD_____
                                                     PANEL: 01  MORE>>
    Buyer:                                     Freeze: N
 Comments:                                     Delete: N
                          HUB
 S          Bidder Name      St  Comm          Bid to Address
 - ----------------------  - ---------- -----------------------------------
 _ PDD FLOORS INC                36010      600 CALLIE RD       DALTON
 _ PDD FLOORS INC                36010      600 CALLIE RD       DALTON
 _ ROBERT ROGERS OFFICE FURNI    36010     1300 W GARY ST       HOUSTON
 _ ROBERT ROGERS OFFICE FURNI    36010     1300 W GARY ST       HOUSTON
 _ TEX FLOOR SERVICE INC         36010     2000 SINTNER         HOUSTON
 _ TEX FLOOR SERVICE INC         36010     2066 SINTNER         HOUSTON
 _ WARE FURNITURE CO             36010     1214 SAMSON AVE      HUNTSVILLE
 _ WARE FURNITURE CO             36010     1214 SAMSON AVE      HUNTSVILLE


                        End of Bidders
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Hmenu Help  EHelp                                      Left  Right
```

Screen 497 - Master List Bidders (Panel 2)

```
  497 Master List Bidders                                   11/18/10 15:32
                                                            FY 2011  CC 02
 > Screen: ___   List: CARPET_____
 >               Bidder: PDD_____
                                          <<MORE   PANEL: 02  MORE>>
    Buyer:                                     Freeze: N
 Comments:                                     Delete: N

 Sel          Bidder Name        HUB        Phone          Fax
 --- ---------------------------- - ------------------- -------------------
  _   PDD FLOORING INC              7068888816          7068888882
  _   PDD FLOORING INC              7061111116          7062779793
  _   ROBERT ROGERS OFFICE FURNITURE 7135222221         7135444444
  _   ROBERT ROGERS OFFICE FURNITURE 7132225551         7135222225
  _   TEX FLOOR SERVICE INC         7139689777          7139666645
  _   TEX FLOOR SERVICE INC         7139456456          7137777946
  _   WARE FURNITURE CO             4092112254          4092999997
  _   WARE FURNITURE CO             4098888814          4092111118


                        End of Bidders
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Hmenu Help  EHelp                                      Left  Right
```

Screen 497 - Master List Bidders (Panel 3)

```
   497 Master List Bidders                              11/18/10 15:35
                                                       FY 2011  CC 02
 > Screen: ___  List: CARPET_____
 >            Bidder: PDD_____
                                              <<MORE    PANEL: 03
    Buyer:                             Freeze: N
 Comments:                            Delete: N
                        Eth    SB     Bid    Resp              Expiration
 Sel     Bidder Name    Org Ge Fg QI  Cnt    Cnt    Bidder ID    Date
 --- -------------------- -- -- -- -- ------- ------- --------------- ----------
  _   PDD FLOORING INC    BL    Y                    L15xxxxxxxx0AA
  _   PDD FLOORING INC    BL    Y                    L15xxxxxxxx0AA
  _   ROBERT ROGERS OFFICE    F Y                    L17xxxxxxxx0AA
  _   ROBERT ROGERS OFFICE    F Y                    L17xxxxxxxx0AA
  _   TEX FLOOR SERVICE                              L17xxxxxxxx0AA
  _   TEX FLOOR SERVICE                              L17xxxxxxxx0AA
  _   WARE FURNITURE CO                              L17xxxxxxxx0AA
  _   WARE FURNITURE CO                              L17xxxxxxxx0AA


                        End of Bidders
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
        Hmenu Help  EHelp                                   Left  Right
```

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 <u>Screen 463</u>.

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.

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).

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

```
    485 Specific List Browse                          11/18/10 15:38
                                                       FY 2011  CC 02

 > Screen: ___      Specific List: B10_____

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

             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.

PF10 COMM – Commodity Pop-Up Window

```
+-------------------------------------------------------+
|                                                       |
|                                                       |
|      Commodity            Commodity Name              |
|                                                       |
|    92675                RADIATION DOSIMETER SERVICES  |
|    898                  X-RAY AND OTHER RADIOLOGICAL E |
|                                                       |
|                                                       |
|                                                       |
|                                                       |
|                                                       |
|                                                       |
|              ****  End of Commodities  **             |
|         PF4 = Exit                                    |
+-------------------------------------------------------+
```

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

Action Line

Specific List: Help 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 **List Commodities**
COMM 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 <u>Screen 486</u>.

Screen 486 - Specific List Browse by Date/Time

```
   486 Specific List Browse by Date/Time                 01/17/07 14:18
                                                          FY 2007  CC 02
  > Screen: ___   Open Date: 01/17/2007  Open Time: 02:18 PM


 Sel      List Name         Open Date  Open Time  Buy  Bid Document  St  Last Print
 --- -------------------- ---------- -------- --- -------------- -  ----------
  _   B700330              01/18/2007  02:00 PM PMA B700330
  _   B700341              01/18/2007  02:00 PM TMS B700341
  _   B700343              01/18/2007  02:00 PM CKA B700343
  _   B700336              01/19/2007  02:00 PM PMA B700336
  _   B700338              01/19/2007  02:00 PM PMA B700338
  _   B700324              01/22/2007  02:00 PM PKP B700324
  _   B700346              01/23/2007  02:00 PM JRZ B700346
  _   B700327              01/24/2007  02:00 PM JRZ B700327
  _   B700337              01/24/2007  02:00 PM TMS B700337
  _   B700347              01/25/2007  02:00 PM JRZ B700347
  _   B700349              01/25/2007  02:00 PM PMA B700349
  _   B700342              01/26/2007  02:00 PM PKP B700342


                 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.

```
+----------------------------------------------------------+
|                                                          |
|                                                          |
|      Commodity              Commodity Name               |
|                                                          |
|   92933                  CRANES: BACKHOE, DRAGLINE, CLA  |
|   929                    EQUIPMENT MAINTENANCE AND REPA  |
|                                                          |
|                                                          |
|                                                          |
|                                                          |
|                                                          |
|                                                          |
|                                                          |
|              ****   End of Commodities   **              |
|         PF4 = Exit                                       |
+----------------------------------------------------------+
```

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 <u>Screen 498</u>.
- 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.

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 character/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   **List Commodities**
COMM   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

```
    487 Specific List Browse by Buyer/Date/Time              11/18/10 15:46
                                                             FY 2011  CC 02
  > Screen: ___   Buyer: ___   Open Date: 11/18/2010  Open Time: 03:46 PM


 Sel      List Name       Buy Open Date   Open Time  Bid Document  St  Last Print
 --- -------------------- --- ---------- --------- --------------- -  ----------
   _   B900278            AGC 12/10/2008  02:00 PM B900278
   _   B900273            AGC 12/12/2008  02:00 PM B900273
   _   B900291            AGC 12/16/2008  02:00 PM B900291
   _   B900298            AGC 12/22/2008  10:00 AM B900298
   _   B900325            AGC 01/23/2009  02:00 PM B900325
   _   B900328            AGC 01/26/2009  02:00 PM B900328
   _   B900345            AGC 02/09/2009  02:00 PM B900345
   _   B900342            AGC 02/10/2009  02:00 PM B900342
   _   B900356            AGC 02/12/2009  02:00 PM B900356
   _   B900348            AGC 02/17/2009  02:00 PM B900348
   _   B900361            AGC 02/17/2009  02:00 PM B900361
   _   B900347            AGC 02/20/2009  02:00 PM B900347

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

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.

```
+-----------------------------------------------------+
|                                                     |
|                                                     |
|                                                     |
|     Commodity           Commodity Name              |
|                                                     |
|   69139               DRIVES, VARIABLE SPEED (AC, AC|
|   691                 POWER TRANSMISSION EQUIPMENT ( |
|                                                     |
|                                                     |
|                                                     |
|                                                     |
|                                                     |
|             ****  End of Commodities  **            |
|         PF4 = Exit                                  |
+-----------------------------------------------------+
```

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

Action Line

Buyer: Help 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   **List Commodities**
COMM   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

```
   488 Specific List Browse by Comm/Date/Time              11/18/10 15:48
                                                           FY 2011  CC 02
 > Screen: ___   Commodity: _____
 >               Open Date: 11/18/2010  Open Time: 03:48 PM

 Sel     List Name         Open Date  Open Time Buy  Bid Document  St  Last Print
 --- -------------------- ---------- --------- --- --------------- -  ----------
  _   B700788              09/21/2007  02:00 PM PMA B700788
  _   B700413              02/26/2007  02:00 PM MEY B700413
  _   B000181              10/06/2009  02:00 PM JRZ B000181
  _   B400746              07/14/2004  02:00 PM DJM B400746
  _   B500328              12/10/2004  02:00 PM DJM B500328
  _   B900495              06/22/2009  02:00 PM JRZ B900495
  _   B000181              10/06/2009  02:00 PM JRZ B000181
  _   B900556              07/13/2009  02:00 PM PAW B900556
  _   B000230              10/27/2009  02:00 PM PAW B000230
  _   B700262              11/27/2006  02:00 PM JRZ B700262
  _   B700290              01/09/2007  02:00 PM JRZ B700290
  _   B700077              10/24/2006  02:00 PM CCO B700077

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

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              Commodity Name              |
|                                                        |
|  91038                 INSULATION AND ASBESTOS INSTAL   |
|  01081                 PREFORMED INSULATION, ALL TYPE   |
|                                                        |
|                                                        |
|                                                        |
|                                                        |
|                                                        |
|               ****  End of Commodities  **             |
|          PF4 = Exit                                    |
+--------------------------------------------------------+
```

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

Action Line

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

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   **List Commodities**
COMM   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)

```
  498 Specific List Bidders                                11/18/10 16:02
                                                           FY 2011  CC 02
 > Screen: ___   List: B100019_____
 >            Bidder: _____
                                                    PANEL: 01  MORE>>
    Buyer: CCC   CENA, CALLEY                 Date: 06/25/2010  Freeze: N
 Comments:                                    Time: 02:00 PM    Delete: N
                            HUB
 S          Bidder Name     St  Comm         Bid to Address
 - ----------------------- - ---------- ------------------------------------
 _ ASP SCIENTIFIC           A 17513      2000 S. SHOAR GROVE  RICHMOND
 _ BURLE COMPANY DBA BCEV   A 17513      P O BOX 1111         GALVESTON
 _ BBB SCIENCE, BBB SUPPLY    17513      4444 RESEARCH DR     SAN ANTONIO
 _ EXPOSURE USA INC         A 17513      10000 ROCKS ROAD     HOUSTON
 _ FFX SCIENTIFIC INC       A 17513      8881 EAST FM 999     ALVARADO




                           End of Bidders
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
        Hmenu Help  EHelp                                   Left  Right
```

Screen 498 – Specific List Bidders (Panel 2)

```
  498 Specific List Bidders                                11/18/10 16:03
                                                           FY 2011  CC 02
 > Screen: ___   List: B100019_____
 >            Bidder: _____
              <<MORE                                PANEL: 02  MORE>>
    Buyer: CCC   CENA, CALLEY                 Date: 06/25/2010  Freeze: N
 Comments:                                    Time: 02:00 PM    Delete: N

 Sel          Bidder Name     HUB      Phone            Fax
 --- ---------------------------- - -------------------- --------------------
  _   ASP SCIENTIFIC           A 713-888-1105        281-333-6396
  _   BURLE COMPANY DBA BCEV   A 409-777-1900        409-777-1899
  _   BBB SCIENCE, BBB SUPPLY CO  210-333-0032       210-333-6745
  _   EXPOSURE USA INC         A 281-444-0900        281-444-0400
  _   FFX SCIENTIFIC INC       A 817-777-7500        817-888-3571




                           End of Bidders
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
        Hmenu Help  EHelp                                   Left  Right
```

Screen 498 - Specific List Bidders (Panel 3)

```
  498 Specific List Bidders                              11/18/10 16:04
                                                         FY 2011  CC 02
 > Screen: ___  List: B100019_____
 >           Bidder: _____
          <<MORE                                     PANEL: 03
    Buyer: CCC   CENA, CALLEY             Date: 06/25/2010  Freeze: N
 Comments:                               Time: 02:00 PM    Delete: N
                         Eth     SB     Bid   Resp                 Expiration
 Sel        Bidder Name  Org Ge Fg QI   Cnt   Cnt    Bidder ID      Date
 --- -------------------- -- -- -- -- ------- ------- -------------- ----------
  _   ASP SCIENTIFIC       AS  F     N                S17xxxxxxxxx00 11/06/2011
  _   BURLE COMPANY DBA BCE WO  F  Y                  S12xxxxxxxxx00 05/28/2012
  _   BBB SCIENTIFIC, BVA S WO  F  Y                  L17xxxxxxxxxAA
  _   EXPOSURE USA INC     AS  F                      S17xxxxxxxxx00 09/28/2014
  _   FFX SCIENTIFIC INC   HI  M                      S17xxxxxxxxx00 12/18/2012



                         End of Bidders
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Hmenu Help  EHelp                                    Left  Right
```

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:**   Help 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.

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

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

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

S: 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 person/ business from which bids will be accepted.

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

Comm: 10 digits
Identifies the commodity code 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
Identifies the area code and phone number of the selected bidder.

Fax: 10 digits
Identifies 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.
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).

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.

Section V
Bidder Maintenance

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

```
   452 Bidder Create/Maintain                            11/18/10 16:12
                                                         FY 2011 CC 02
 > Screen: ___  Bidder: 1xxxxxxxxxxx0  Type of funds (S or L): S CMBL Bidders

     Name: "MAID" TO ORDER_____   For local bidders, the
  Address: 1333 BRYANT DRIVE_____  information below the line
           _____  marked "CMBL Information"
           _____  will remain blank.
     City: GAYLORD_____  State: TX  Z
  or CMBL Foreign: _____

   County: DALLAS_____
  Contact: Zeva Z Zora_____
    Phone: 817-999-6666_____     Fax: 972-444-3333_____
 Internet: zvz@any.com_____
   Gender: F   Ethnic: AS   Small Bus Fg: _   QISV: N   Texas Office: Y

  * --------------------------- CMBL Information ---------------------------- *
            Hub Status: A          Hub Expire Dt: 06/28/2014
            Hub Cert: 80918_               Hub Fg:
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Hmenu Help  EHelp         BDesc Audit      Copy
```

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 **inform**ation 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)

```
+------------------------------------------------------------------------------+
| F0043 Mark Vendor with an 'X' to select                                      |
| > Screen: ___ Search: _____  Type: N (N,B)   LOCAL Bidders    |
| >                                     Type of Funds: L (S or L)               |
| >                               Include Frz/Del Bidders: N (Y or N)           |
|                                                      Panel: 01 More >>        |
|          Bidder Name                ---------- Bid to ------------------       |
| _ A.A. DERK CO                 7777 CALLEY AVE      NILES        IL           |
| _ A.C.E.R.                     1420 W MASON        DALLAS       TX           |
| _ A+ GLASS PRODUCTS            1919 HARRY HINES     BRYAN        TX           |
| _ A+ GLASS PRODUCTS            754 N HARRY HINES N  BRYAN        TX           |
| _ A+ SEPTIC SYSTEM INC         P O BOX 6666        BRYAN        TX           |
| _ A&A TELE GROUP INC           PO BOX 111111       AUSTIN       TX           |
| _ A&C PLASTER PRODUCTS INC     6035 NORTHERN       HOUSTON      TX           |
| _ A&M ELECTRIC SUPPLY INC      6245 CORRIELLE DR   HOUSTON      TX           |
| _ A&M ENGRAVING                108 S MISSION       BRYAN        TX           |
| _ A&M ROOF REPAIR              4520 KINGFORD       BRYAN        TX           |
| _ A&M TRAIN SERVICE            701 UNIVERSAL DR    COLLEGE STATI TX          |
| _ A&M TRAIN SERVICES INC       700 UNIVERSAL DR    COLLEGE STATI TX          |
| _ A&R REPROOFER INC            1820 W SAMPSON      HOUSTON      TX           |
|          ** MORE BIDDERS - PRESS <ENTER> TO VIEW **                          |
|                  PF4=Exit   PF10=Left   PF11=Right                           |
+------------------------------------------------------------------------------+
```

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

```
  F2518 Local Bidder check digits assigned or modified
+------------------------------------------------------------------------------+
| F0043 Mark Vendor with an 'X' to select                                      |
| > Screen: ___ Search: _____  Type: N (N,B)   LOCAL Bidders    |
| >                                     Type of Funds: L (S or L)               |
| >                               Include Frz/Del Bidders: N (Y or N)           |
|            << More                                Panel: 02                   |
|          Bidder Name         Bidder ID    Vendor ID Eth Ge St Expire Dt       |
| _ A.A. DERK CO              10xxxxxxxx0AA                                     |
| _ A.C.E.R.                  17xxxxxxxx0AA 1vvvvvvvvv0                         |
| _ A+ GLASS PRODUCTS         17xxxxxxxx0AA 1vvvvvvvvv0                         |
| _ A+ GLASS PRODUCTS         17xxxxxxxx0AB 1vvvvvvvvv1                         |
| _ A+ SEPTIC SYSTEM INC      10xxxxxxxx0AA 1vvvvvvvvv0                         |
| _ A&A TELE GROUP INC        17xxxxxxxx0AA 1vvvvvvvvv0                         |
| _ A&C PLASTER PRODUCTS INC  17xxxxxxxx0AA 1vvvvvvvvv0      F                  |
| _ A&M ELECTRIC SUPPLY INC   13xxxxxxxx0AA 1vvvvvvvvv0 AS  U                   |
| _ A&M ENGRAVING             24xxxxxxxx0AB 2vvvvvvvvv1                         |
| _ A&M ROOF REPAIR           17xxxxxxxx0AA 1vvvvvvvvv0                         |
| _ A&M TRAIN SERVICE         24xxxxxxxx0AA 2vvvvvvvvv1                         |
| _ A&M TRAIN SERVICES INC    17xxxxxxxx0AA 1vvvvvvvvv0                         |
| _ A&R REPROOFER INC         17xxxxxxxx8AA 1vvvvvvvvv0 WO  F                   |
|          ** MORE BIDDERS - PRESS <ENTER> TO VIEW **                          |
|                  PF4=Exit   PF10=Left   PF11=Right                           |
+------------------------------------------------------------------------------+
```

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

Action Line

◆ **Bidder:**   Help 13 digits
                         Enter the desired bidder's identification number.

◆ **Type of funds**   1 character
   (S or L):   Indicate the type of funds to be displayed: State (S) or local (L) bidder
                         information.

Screen Information

◆ **Name:**   40 characters
Enter the name of the bidder to be added, modified, or displayed.

◆ **Address:**   40 digits/characters per line
Indicate the street address to which bid information will be sent.

◆ **City:**   40 characters
Include the city to which bid information will be mailed.

◆ **State:**   2 characters
Identify the state to which bid information will be mailed.

◆ **Zip:**   10 digits
Type the Zip Code to which bid information will be mailed.

Country: 3 characters
Indicate the country to which bid information will be mailed.

or CMBL Foreign: 40 digits/characters
Identify the address for the bidder, if it is a foreign bidder.

County: 40 characters
Signify the county in which the bidder is located.

Contact: 50 characters
Indicate the name of the CMBL contact person for the selected bidder.

Phone: 10 digits
Supply the area code and phone number used to access the bidder.

Fax: 10 digits
Identify the area code and phone number of the bidder's Fax.

Internet: 50 characters/digits
Provide the email (Internet electronic mail) address of the selected bidder.

Gender: 1 character
Indicate the gender of the bidder: female (F) or male (M).

Ethnic: 2 characters
Signify the ethnic origin of the selected bidder.

Small Bus Fg: 1 character
Indicate whether or not the bidder is classified as a small business.

QISV: 1 character
Indicates whether or not ("Y" or "N") the bidder is a Qualified Information System Vendor.

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 <u>removed</u> 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	**Business Description**
BDesc	Used to enter a detailed business description of the selected bidder.
PF6	**Bidder Audit**
Audit	Provides details about the status of a bidder.
PF8	**Copy Bidder**
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

```
  453 Bidder with Multiple Commodities                   11/18/10 16:29
                                                         FY 2011 CC 02
   Screen: ___   Bidder: 1xxxxxxxxxxAA   Local Bidders
                         PAPERGRAPHICS INC

   F    Commodity        Name
   _    015-06_____  ADDRESSING MACHINE SUPPLIES, METAL AND PLASTIC PLA
   _    015-10_____  ADDRESSING MACHINE SUPPLIES, PAPER PLATE TYPE
   _    015-15_____  CHEMICALS AND SUPPLIES, DRY (FOR BOND PAPER TYPE C
   _    015-16_____  CHEMICALS AND SUPPLIES, WET (FOR BOND PAPER TYPE C
   _    015-20_____  CHEMICALS AND SUPPLIES (FOR SPIRIT TYPE DUPLICATIN
   _    015-25_____  CHEMICALS, INKS, AND SUPPLIES (FOR MIMEOGRAPH MACH
   _    015-39_____  PAPER, CHEMICALS, AND SUPPLIES (FOR COATED OR TREA
   _    015-45_____  PAPER, CHEMICALS, AND SUPPLIES (FOR DIFFUSION TRAN
   _    015-55_____  PAPER AND SUPPLIES (FOR DUAL SPECTRUM PROCESS COPY
   _    015-70_____  PAPER, CHEMICALS, AND SUPPLIES (FOR THERMAL PROCES
   _    015-90_____  TRANSPARENCIES (FOR USE WITH TRANSPARENCY MAKERS A
   _    015-99_____  COMMODITIES NOT OTHERWISE CLASSIFIED
   _    880-88_____  TRANSPARENCIES (SEE CLASS 715 FOR PREPARED MATERIA
   _    _____
                         13 Bidder/Comm found - End of List
  Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
        Hmenu Help  EHelp
```

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.

Bidder with Multiple Commodities - Screen 453

```
   453 Bidder with Multiple Commodities                   01/17/07 14:33
                                                          FY 2007 CC 02
      Screen: ___  Bidder: 1vvvvvvvvvvvAA   Local Bidders
                           XERON BUSINESS SERVICES

      F    Commodity         Name
      _    204-82_____   PRINTERS, MICROCOMPUTER (NOT OTHERWISE CLASSIFIED)
      _    206-72_____   PRINTERS, HIGH SPEED, LINE PRINTERS, AND PRINTER S
      _    600-57_____   DUPLICATING MACHINES AND ACCESSORIES, MIMEOGRAPH T
      _    939-21_____   COMPUTERS, DATA PROCESSING EQUIPMENT AND ACCESSORI
      A    *939*_____
      _    _____
      _    _____
      _    _____
      _    _____
      _    _____
      _    _____
      _    _____
      _    _____
      _    _____
      _    _____   4 Bidder/Comm found - End of List
    Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
          Hmenu Help  EHelp
```

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**.

Commodity List Pop-Up Window

```
+------------------------------------------------------------------+
|   F0045 Mark Commodity with an 'X' to select                     |
|   Screen: ___   Search: *939*_____  Type: C (N,C)          |
|                     Include Frz/Del Commodities: N                |
|            Commodity Name           Commodity     Alias Frz Del   |
|   _ COMPUTERS                       939               N           |
|   _ CALCULATING MACHINES (NOT COMP  939-15            N           |
|   X COMPUTERS AND COMPUTER EQUIPME  939-21            N           |
|   _ COPYING MACHINES                939-27            N           |
|   _ DICTATING MACHINES              939-35            N           |
|   _ INTERCOM AND OTHER SOUND EQUIP  939-42            N           |
|   _ LIBRARY MACHINES                939-48            N           |
|   X MICROFILM AND MICROFICHE EQUIP  939-54            N           |
|   _ OPTICAL DISK EQUIPMENT          939-61            N           |
|   _ PHOTOGRAPHIC EQUIPMENT          939-66            N           |
|   _ RADIO EQUIPMENT                 939-68            N           |
|   _ TELECOMMUNICATION AND TELEPHON  939-72            N           |
|   _ RADIO, TELECOMMUNICATION, AND   939-73            N           |
|      ** More Entries **                                          |
|                         PF4 to Exit                               |
+------------------------------------------------------------------+
```

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.

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 <u>Screen 454</u>. 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

```
    454 Bidder Flag Maintenance     AA ATOM CONTROLS             11/18/10 14:46
                                                                   FY 2011 CC AM
  Screen: ___       Bidder : 1vvvvvvvvvvAA

       Bidder Flags                 Comment:



            N - FREEZE Bidder        UNDO FLAG CHANGE

            N - DELETE this Bidder



                     Freeze Info.     Delete Info.
         Operator:     Jxxxx6
         Date:         11/18/2010




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

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.

```
+-----------------------------------------------+
|                                               |
|       Reason flag being changed               |
|       _____        |
|                                               |
+-----------------------------------------------+
```

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

Action Line
◆ **Bidder:**   Help 13 digits
                          Type in the desired bidder identification number to display flag information.

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**
Warn	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*.

Screen 455 - Copy State Bidder Commodities

```
   455 Copy State Bidder Commodities                        11/18/10 14:50
                       BIN PLASTICS INC                      FY 2011 CC AM
 > Screen: ___   From Bidder: 1vvvvvvvvvv00 CMBL  BIDDER
 >                 To Bidder: 2vvvvvvvvvvAA LOCAL BIDDER  KANT, KYLE K

  Sel   Commodity               Commodity Name
  _     015                      ADDRESSING, COPYING, MIMEOGRAPH, AND SPIRIT DUPLIC
  _     015-15                   CHEMICALS AND SUPPLIES, DRY
  _     015-20                   CHEMICALS AND SUPPLIES
  _     015-25                   CHEMICALS, INKS, AND SUPPLIES
  _     015-90                   TRANSPARENCIES




                  5 Bidder/Comm remain  - End of List
  Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
        Hmenu Help  EHelp            All
```

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.

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
                    A & A GRAPHIC SUPPLY CORP                FY 2011 CC 02
 > 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 L5N 2
  _ COMMERCE HYDRA COOLER          TIMBER PARK DRIVE    WARWICK      XX
  _ TRUMPS SOFTWARE                GPO BOX 1111         HOBART TAS   XX 7001
  _ NORTHWESTER GRAPHICS           444 ALVIN STREET     WATERLOO ONTA CA N2L3V
  _ 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          G1P 4
                      ** More Bidders - Press <ENTER> to view **
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Hmenu Help  EHelp                                   Left  Right
```

Screen 456 - Copy Vendor to Bidder (Panel 2)

```
   456 Copy Vendor to Bidder                              01/17/07 14:54
                    A & A GRAPHIC SUPPLY CORP                FY 2007 CC 02
 > 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 ------------------------------- *
                                             Famis        Ethnic
  S           Name                  ID        Vndr ID  Gdr  Code
  _ BIOS CONVEYOR SYSTEMS LIMIT    TvvvvvvvvvvvAA  TvvvvvvvvvvvAA
  _ COMMERCIAL HYDRA COOLER        TvvvvvvvvvvvAA  Tvvvvvvvvv0
  _ TRUMPS SOFTWARE                TvvvvvvvvvvvAA  Tvvvvvvvvv0
  _ NORTHWESTERN DIGITAL           TvvvvvvvvvvvAA  Tvvvvvvvvv0
  _ SOIL MECHANISM INSTRUMENTATION TvvvvvvvvvvvAA  Tvvvvvvvvv0
  _ PHILS INTERNATIONAL INDUSTRIAL TvvvvvvvvvvvAA  Tvvvvvvvvv0
  _ BULGAR ACADEMICS CENTER        TvvvvvvvvvvvAA  Tvvvvvvvvv0
  _ NATIONAL OPTICALS              TvvvvvvvvvvvAA  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) of the bidder you would like to display.
- 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.

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

```
   457 Copy Bidder to Vendor                            11/18/10 14:56
                      DALES ELECTRICAL SUPPLY CO              FY 2011 CC 02
     Screen: ___  Bidder: 1vvvvvvvvvvAC  Type(S or L): L   Local Bidders
            Vendor Search: _____ 444 INTERCOASTAL PKWY
              Type(N,I): _                     ARLINGTON            TX
                                                          76011


   Copy to Vendor File: N  (Enter a 'Y' to copy a bidder to vendor file)

   * ------------------------------ VENDORS ------------------------------ *
                                    -- Bid To --
    S          Name                   Address Line        City     St Df
    _ 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
    _ DALES ELECTRICAL SUPPLY CO   PO BOX 2222          WACO         TX  R




                      ** End of list - 4 02 Campus vendor(s) found
   Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
         Hmenu Help  EHelp           Vndrs             Remit       Order Bid
```

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.

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 <u>Screen 103</u> 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): Help 1 character
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 <u>Screen 103</u>.

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.

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   **Vendor Information**
Vndrs   Used to change the screen to display the vendor identification number instead of the "Remit To" address.

PF9   **Remit Information**
Remit   Used to change the screen to display "Remit To" address instead of the vendor
               identification number.

PF11   **Order Information**
Order   Used to change the screen to show the address where the order is to be sent.

PF12   **Bidder Information**
Bid   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)

```
   459 Copy HUB to Bidder                                  11/18/10 14:57
                    A & M UPHOLSTERY                       FY 2011 CC 02
 > Screen: ___     HUB ID: 1vvvvvvvvv5          5 WEST AVENUE O
 >         Bidder Search: A_____    SAN ANGELO         TX
 >           Type(N,I): N                                    76903
                                                 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  Zip
   _ A & A INDUSTRIAL SUPPLY    10817 NOTUS LANE    EL PASO     TX 79935
   _ A & C PLASTIC PRODUCTS INC 6035 NORTHDALE      HOUSTON     TX 77087
   _ A & D PORTABLE TOILETS     PO BOX 2954         BRYAN       TX 77805
   _ A & E JANITORIAL SERVICE   14501 FITZGIBBON DR AUSTIN      TX 78725
   _ A B COMMERCIAL JANITORIAL  8700 LONG POINT SUI HOUSTON     TX 77055
   _ A B DICK PRODUCTS CO OF DALLAS STE 205         DALLAS      TX 75229
   _ A B DICK PRODUCTS COMPANY OF W 141 BLUFFVIEW CIRCLE CHINA SPRING TX 76633
   _ A B E SYSTEMS INC          PO BOX 34           BRYAN       TX 77806
                    ** More Bidders - Press <ENTER> to view **
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Hmenu Help  EHelp                                      Left  Right
```

Screen 459 - Copy HUB to Bidder (Panel 2)

```
   459 Copy HUB to Bidder                                  11/18/10 14:57
                    A & M UPHOLSTERY                       FY 2011 CC 02
 > Screen: ___     HUB ID: 1vvvvvvvvv5          5 WEST AVENUE O
 >         Bidder Search: A_____    SAN ANGELO         TX
 >           Type(N,I): N                                    76903

                                             <<More   Panel: 02
  Copy to Bidder File: N  (Enter a 'Y' to copy a vendor to local bidder file)

  * ------------------------------ Bidders ------------------------------- *
                                          HUB       Ethnic      Sm.
   S          Name                ID      Status  Gdr  Code  QISV Bus.
   _ A & A INDUSTRIAL SUPPLY    2vvvvvvvvvvAA          M    HI
   _ A & C PLASTIC PRODUCTS INC 1vvvvvvvvvvAA
   _ A & D PORTABLE TOILETS     1vvvvvvvvvvAA
   _ A & E JANITORIAL SERVICE   1vvvvvvvvvvAA          F    HI
   _ A B COMMERCIAL JANITORIAL  1vvvvvvvvvvAA
   _ A B DICK PRODUCTS CO OF DALLAS 1vvvvvvvvvvAA                Y
   _ A B DICK PRODUCTS COMPANY OF W 2vvvvvvvvvvAA
   _ A B E SYSTEMS INC          1vvvvvvvvvvAA
                    ** 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 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.

Bidder Search:	20 characters	

Indicate the bidder's name or portion of the name for which you would like <u>to</u> 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.

Sm. Bus.: 1 character
"Y" indicates the bidder is a 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

```
   463 Bidder Commodity Inquiry   DEALERS ELECTRICAL SUPPLY CO    11/18/10 14:57
                                                                  FY 2011 CC 02
 > Screen: ___   Bidder: 1vvvvvvvvvvvAC  Type of funds(S or L): L LOCAL BIDDERS
 >          Commodity: _____

 Sel   Commodity                Commodity Name
   _   285-14                    CIRCUIT BREAKERS, LOAD CENTERS, BOXES, AND PANELBO
   _   285-61                    METERS, INDICATING AND RECORDING OF POWER CONSUMPT
   _   285-79                    SWITCHES, PARTS AND ACCESSORIES (MISCELLANEOUS)
   _   285-96                    UNINTERRUPTIBLE POWER SUPPLIES
   _   476-25                    MICROCOMPUTER AREA NETWORK COMPONENTS, ETHERNET:
   _   730-12                    COMPUTER-AUTOMATED MEASUREMENT AND CONTROL (CAMAC)
   _   936-25                    ELECTRICAL EQUIPMENT (EXCEPT CABLE AND WIRES, AND





                        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:** 13 digits

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 <u>Screen 451</u>.

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)

```
    464 Bidder List by Commodity                            11/18/10 16:49
                                                           FY 2011  CC 02
 > Screen: ___   Commodity: 285-60_____   District: __  Type of funds: L
 >            Bidder Name: _____
                                                          Panel: 01 More >>
 Commodity Name: LOCATORS, CABLE


 Sel        Bidder Name         HUB         Bid to Address
 --- ---------------------------  -  ----------------------------------------
  _   CENTRA ELECTRICAL SUPPLY       PO BOX 4444        BRYAN        TX
  _   DEALS ELECTRICAL SUPPLY CO     P O BOX 3456       BRYAN        TX
  _   ELLIS ELECTRIC SUPPLY          2555 CANEVILLE AVE BRYAN        TX






                    *** End of Bidders List ***
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Hmenu Help  EHelp                                     Left  Right
```

Screen 464 - Bidder List by Commodity (Panel 2)

```
    464 Bidder List by Commodity                            11/18/10 16:50
                                                           FY 2011  CC 02
 > Screen: ___   Commodity: 285-60_____   District: __  Type of funds: L
 >            Bidder Name: _____
                                               << More  Panel: 02
 Commodity Name: LOCATORS, CABLE

                              Eth          Bid     Resp              Expiration
 Sel        Bidder Name       Org Ge St    Cnt     Cnt    Bidder ID    Date
 --- --------------------- -- -- -- ------- ------- -------------- ----------
  _   CENTRA ELECTRICAL SUP                          L17xxxxxxxx0AB
  _   DEALS ELECTRICAL SUP                           L17xxxxxxxx0AB
  _   ELLIS ELECTRIC SUPPL                           L17xxxxxxxx0AB






                    *** End of Bidders List ***
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Hmenu Help  EHelp                                     Left  Right
```

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:**
Help 15 digits
Indicate the commodity code for the list bidders to be displayed.

District:
Help 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.

→ **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: 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 <u>Screen 451</u>. It may also become necessary to freeze or delete certain commodity codes.

You cannot update on State codes.

Screen 451 - Commodity Master Create/Modify

```
   451 Commodity Master Create/Modify                      11/18/10 15:07
                                                           FY 2011 CC 02
    > Screen: ___  Commodity: 600-15_____  Type Fund(S or L): S
                                                      CMBL Commodities
   Cm Name: CALCULATORS, ELECTRONIC, DISPLAY/PRINTING TYPE, PR
                                                      Date estb: 11/08/1996
                                                      Last actv: 11/08/1996


    Buyer: ___    Phone:              Name:
                                            Changes to "Local Commodities" if "L"
   Description: CALCULATORS, ELECTRONIC, DIS  is entered in the Type Fund field.
                G TYPE, PROGRAMMABLE (SEE 30
                VEYING TYPE)_____
                _____

                Freeze: N     Delete: N      Drop: N




    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 of 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 of 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

```
+--------------------------------------------------------------+
|  F0045 Mark Commodity with an 'X' to select                  |
|   Screen: ___   Search: CALCULATORS_____ Type: N (N,C)  |
|                   Include Frz/Del Commodities: N             |
|         Commodity Name         Commodity      Alias Frz Del  |
| _ CALCULATORS (PROGRAMMED FOR SU 305-06          Y           |
| _ CALCULATORS, ELECTRONIC, DISPL 600-15          Y           |
| _ CALCULATORS, ELECTRONIC, DISPL 600-16          Y           |
| _ CALCULATORS, ELECTRONIC, DISPL 600-17          Y           |
| _ CALCULATORS, ELECTRONIC, DISPL 600-19          Y           |
| _ CALCULATORS, ELECTRONIC, PRINT 600-21          Y           |
| _ CALCULATORS, ELECTRONIC, PRINT 600-22          Y           |
| _ CALCULATORS, MECHANIAL         600-25          Y           |
| _ CALCULATORS, MECHANICAL        600-25          N           |
| _ CALCULATORS, PROGRAMMED        305-06          Y           |
| _ CALCULATORS, PROGRAMMED (FOR S 305-06          Y           |
|                                                              |
|                                                              |
|    ** End of list - 11 commodity(s) found **                 |
|                    PF4 to Exit                               |
+--------------------------------------------------------------+
```

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.

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

```
   458 Commodity Alias Create/Mod                            11/18/10 15:09
                                                             FY 2011 CC 02
    Screen: ___  Commodity: 600-15_____

   Commodity name:  CALCULATORS, ELECTRONIC, DISPLAY/PRINTING TYPE, PR

   Commodity alias                                Drop
   CALCULATORS, ELECTRONIC, DISPLAY/- PRINTING TYPE,_  _
   BRAILLE WRITERS_____  _
   _____  _
   _____  _
   _____  _
   _____  _
   _____  _
   _____  _
   _____  _
   _____  _
   _____  _
   _____  _
   _____  _
   _____  _
   _____  _
   Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
         Hmenu Help  EHelp
```

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

```
+------------------------------------------------------------------+
|    F0045 Mark Commodity with an 'X' to select                    |
|    Screen: ___   Search: CALCULATOR_____ Type: N (N,C)       |
|                      Include Frz/Del Commodities: N               |
|          Commodity Name         Commodity      Alias Frz Del      |
|  _ CALCULATORS (PROGRAMMED FOR SU 305-06          Y               |
|  _ CALCULATORS, ELECTRONIC, DISPL 600-15          Y               |
|  _ CALCULATORS, ELECTRONIC, DISPL 600-16          Y               |
|  _ CALCULATORS, ELECTRONIC, DISPL 600-17          Y               |
|  _ CALCULATORS, ELECTRONIC, DISPL 600-19          Y               |
|  _ CALCULATORS, ELECTRONIC, PRINT 600-21          Y               |
|  _ CALCULATORS, ELECTRONIC, PRINT 600-22          Y               |
|  _ CALCULATORS, MECHANIAL         600-25          Y               |
|  _ CALCULATORS, MECHANICAL        600-25          N               |
|  _ CALCULATORS, PROGRAMMED        305-06          Y               |
|  _ CALCULATORS, PROGRAMMED (FOR S 305-06          Y               |
|                                                                  |
|                                                                  |
|    ** End of list - 11 commodity(s) found **                     |
|                      PF4 to Exit                                  |
+------------------------------------------------------------------+
```

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.

> When a **commodity** is dropped (using Screen 451), FAMIS will automatically remove all aliases that have been created for the commodity.

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.

◆ **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:

Commodity Name Search Pop-Up Window

```
+--------------------------------------------------------------+
|   F0045 Mark Commodity with an 'X' to select                 |
|    Screen: ___   Search: COMPU_____  Type: N (N,C) |
|                     Include Frz/Del Commodities: N           |
|            Commodity Name          Commodity      Alias Frz Del |
|  _ COMPUTED RADIOGRAPHY DIGITIZIN 898-21             Y        |
|  _ COMPUTER - HARDWARE, CONSULTIN 918-28             Y        |
|  _ COMPUTER - SOFTWARE, CONSULTIN 918-29             Y        |
|  _ COMPUTER ACCESSORIES (NOT OTHE 984-30             Y        |
|  _ COMPUTER ACCESSORIES AND SUPPL 207                Y        |
|  _ COMPUTER AIDED DESIGN          209-31             N        |
|  _ COMPUTER AIDED DESIGN AND VECT 208-30             Y        |
|  _ COMPUTER AIDED DESIGN SERVICE  920-18             Y        |
|  _ COMPUTER AIDED DESIGN SERVICES 920-18             N        |
|  _ COMPUTER CENTER ISOLATION SYST 285-44             Y        |
|  _ COMPUTER DIGITIZING SERVICES   920-19             N        |
|  _ COMPUTER HARDWARE AND PERIPHER 204                Y        |
|  _ COMPUTER HARDWARE AND PERIPHER 205                Y        |
|     ** More Entries **                                       |
|                      PF4 to Exit                             |
+--------------------------------------------------------------+
```

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:

Commodity Inquiry – Basic Concepts (cont'd)

Screen 451 - String Search

```
+-----------------------------------------------------------------+
| |                                                             | |
| |  F0045 Mark Commodity with an 'X' to select                 | |
| |  Screen: ___    Search: *ADD*_____ Type: N (N,C)  | |
| |                 Include Frz/Del Commodities: N              | |
| |            Commodity Name        Commodity     Alias Frz Del| |
| | _  ADDING MACHINE AND CALCULATOR  615-03          Y        | |
| | _  ADDING MACHINE AND CALCULATOR  615-04          Y        | |
| | _  ADDING MACHINES                600-05          N        | |
| | _  ADDING MACHINES AND CALCULATOR 615-03          Y        | |
| | _  ADDITIVES AND MISCELLANEOUS PA 630-03          Y        | |
| | _  ADDITIVES AND MISCELLANEOUS PA 630-06          Y        | |
| | _  ADDITIVES AND SUPPLEMENTS, FER 335-04          Y        | |
| | _  ADDITIVES, RINSE               505-09          N        | |
| | _  ADDRESSING MACHINE SUPPLIES, M 015-06          Y        | |
| | _  ADDRESSING MACHINE SUPPLIES, P 015-10          Y        | |
| | _  ADDRESSING MACHINES            600-08          Y        | |
| | _  ADDRESSING MACHINES            600-11          Y        | |
| | _  ADDRESSING MACHINES (COMPUTER  600-08          Y        | |
| |  ** More entries **                                         | |
| |                        PF4 to Exit                          | |
+-----------------------------------------------------------------+
```

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.

Screen 451 - String Search Escape Window

```
+---------------------------------------------+
| |                                         | |
| |    Screen: ___                          | |
| |                                         | |
| |    Search: *ADD*_____        | |
| |                                         | |
| |    Processed 501 records                | |
| |                                         | |
| |    Found 0 matches                      | |
| |                                         | |
| |    Press <ENTER> to continue search     | |
| |                                         | |
| |  PF4=Exit      PF5=Show current matches  | |
+---------------------------------------------+
```

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

```
   460 Commodity Name Search                              11/18/10 15:13
                                                          FY 2011 CC 02
  > Screen: ___  Commodity Name: CALC_____   Type Funds(S or L): S
                                                          CMBL Commodities

 Sel        Commodity Name          Commodity        Alias
   _   CALCIUM CARBONATE            325-12            N
   _   CALCIUM CARBONATE AND SODIUM B  325-12         Y
   _   CALCULATING MACHINE (NOT COMPU  939-15         Y
   _   CALCULATING MACHINES (NOT COMP  939-15
   _   CALCULATORS (PROGRAMMED FOR SU  305-06
   _   CALCULATORS, ELECTRONIC, DISPL  600-15
   _   CALCULATORS, ELECTRONIC, DISPL  600-16
   _   CALCULATORS, ELECTRONIC, DISPL  600-17         Y
   _   CALCULATORS, ELECTRONIC, DISPL  600-19         Y
   _   CALCULATORS, ELECTRONIC, PRINT  600-21         Y
   _   CALCULATORS, ELECTRONIC, PRINT  600-22         Y
   _   CALCULATORS, MECHANIAL          600-25         Y
   _   CALCULATORS, MECHANICAL         600-25         N
   _   CALCULATORS, PROGRAMMED         305-06         Y
   _   CALCULATORS, PROGRAMMED (FOR S  305-06         Y
       ** End of list - 15 commodity(s) found **
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
         Hmenu Help  EHelp
```

Changes to "Local Commodities" if "L" is entered in the *Type Fund* field.

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.

Changes to "Local Commodities" if "L" is entered in the *Type Funds* field.

Screen 461 - Commodity List By Number

```
    461 Commodity List By Number                          11/19/10 09:17
                                                          FY 2011 CC 02
    >  Screen: ___    Type Funds(S or L): S   CMBL Commodities
                                              Date      Date      Flags
       Commodity         Commodity Name    Byr  Created   Used      F D
    >  895_____    _____  ___  _____ _____  _ _
   Sel
    _  895             WELDING EQUIPMENT AND SUP    11/08/1996 11/08/1996  N N
    _  895-10          ARC WELDERS, ELECTRIC DRI    11/08/1996 11/08/1996  N N
    _  895-20          ARC WELDERS, ENGINE DRIVE    11/08/1996 11/08/1996  N N
    _  895-21          ARC WELDERS, WIRE, SELF-F    11/08/1996 11/08/1996  N N
    _  895-25          ELECTRIC SPOT WELDER         11/08/1996 11/08/1996  N N
    _  895-27          ELECTRIC WELDING TORCH, F    11/08/1996 11/08/1996  N N
    _  895-29          FITTINGS FOR WELDING EQUI    01/19/2001 01/19/2001  N N
    _  895-30          GAS CYLINDER CARTS, INDUS    11/08/1996 11/08/1996  N N
    _  895-40          GAS TUNGSTEN-ARC WELDER (    11/08/1996 11/08/1996  N N
    _  895-45          GAS SHIELDED METAL-ARC WE    11/08/1996 11/08/1996  N N
    _  895-48          GAS WELDING APPARATUS (GA    11/08/1996 11/08/1996  Y N
    _  895-50          GAS WELDING APPARATUS        11/08/1996 11/08/1996  N N
    _  895-55          TORCH, CUTTING               01/19/2001 01/19/2001  N N
       ** Press <ENTER> to continue search **
   Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
        Hmenu Help  EHelp
```

Type a number to advance display.

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.

Section VIII
Appendix

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 <u>Screen 164</u> (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.

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: _
```

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**.

Screen 2 - GL 6 Digit

```
   002 GL 6 Digit                                    08/01/11 09:17
                                                     FY 2011 CC 02
     Screen: ___   Account: 010100 ____ ED & GEN INCOME-TUITION

  Account Title: ED & GEN INCOME-TUITION_____        SRS: _
    Resp Person: 5uuuuuuu4 MASON, MOLLY M         Old Acct: NA_____
  Year-end Process: F    Reclassify: _  Reporting Group: __  Aux Code: ___
    AFR Fund Group: ?_   Fund Group: FG  Sub Fund Group:    Sub-Sub: __
         Function: __

     Default Bank: 06000     Override: Y     SL Mapped Count: 22
  Alternate Banks: *****  _____  _____  _____  _____  Security: _____

                Dept  S-Dept Exec Div Coll Mail Cd Stmt
      Primary:   REV__ _____   UN   AD       C6000    N
    Secondary:   VTEA_ _____   AA   CD   VM  C4457    N


  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
```

The first help screen describes the field; pressing <ENTER> will display the values for the field.

```
   Field: FG-FS-YY-END-PROC             File: IAFRS-GENERAL-SUBSIDIARY-LEDGER


   Flag to indicate what action
   to take with balance at year
   end.
```

```
+---------------------------------------------------------------+
|                                                               |
|            *** D I C T I O N A R Y - H E L P ***               |
|                                                               |
|   VALUES                           MEANING                     |
|   ------------------------------   ------------------------    |
|   F                                Fiscal Year                 |
|   P                                Project Year                |
|   E                                Encumbrance Only (SL's only)|
|   T                                Transfer BBA (SL's Only)    |
|   D                                BBA to Different account (SL)|
|                                                               |
+---------------------------------------------------------------+
```

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

```
 002 GL 6 Digit                                            08/01/11 09:17
                                                           FY 2011 CC 02
   Screen: ___   Account: 010100 ____  ED & GEN INCOME-TUITION

 Account Title: ED & GEN INCOME-TUITION_____           SRS: _
   Resp Person: 5uuuuuu4 MASON, MOLLY M               Old Acct: NA_____
 Year-end Process: F    Reclassify: _  Reporting Group: __  Aux Code: ___
   AFR Fund Group: ?_    Fund Group: FG  Sub Fund Group:     Sub-Sub: __
        Function: __

   Default Bank: 06000     Override: Y     SL Mapped Count: 22
 Alternate Banks: *****  _____  _____  _____  _____   Security: _____

              Dept  S-Dept Exec Div Coll Mail Cd Stmt
     Primary:  REV__ _____    UN  AD       C6000   N
   Secondary:  VTEA_ _____    AA  CD  VM   C4457   N


 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

```
 002 GL 6 Digit                                            08/01/11 16:41
             +-------------------------------------------------------+ AM
   Screen: ___ | ** More Codes - Press <ENTER> to View **           |
             |                                                       |
 Account Titl |   Search Criteria:    AFR Fund Group: 10             |
 Resp Person: |                                                      |
 Year-end Pro |    AFR      Sub                                       |
  AFR Fund G  |    Fund  Fund Fund   Description                     |
       Func   |  X  10    FG          FUNCTIONAL AND GENERAL          |
    Default   |  _  20    DS    DF    DESIGNATED/FUNCTIONAL & GENERAL |
  Alternate B |  _  21    DS    DS    DESIGNATED/SERVICE DEPARTMENTS  |
             |  _  22    DS    ST    DESIGNATED/SERV DEPT-MATERIAL & SUP |
             |  _  23    DS    SM    DESIGNATED/SERV DEPT-COMM & UTIL |
        Pri  |  _  24    DS    SU    DESIGNATED/SERV DEPT-REPAIRS & MAIN |
       Secon |  _  25    DS    SR    DESIGNATED/SERV DEPT-RENTALS & LEAS |
             |  _  26    DS    SL    DESIGNATED/SERV DEPT-PRINTING & REP |
     Fund So |  _  27    DS    SP    DESIGNATED/SERV DEPT-CLAIMS & LOSSE |
      Long T |  _  28    DS    SC    DESIGNATED/SERV DEPT-OTHER OPER EXP |
             |  _  29    DS    SO    DESIGNATED/SERV DEPT-OTHER OPER EXP |
  Account Le |  _  30    AX    AX    AUXILIARY NON-PLEDGED             |
             |              -- IASYS-AFR-FUND-GROUP  --               |
 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).

```
DESCRIPTION:  AN INSTITUTIONALLY DEFINED CODE THAT GROUPS CURRENT FUND
EXPENDITURES ACCORDING TO THE PURPOSE FOR WHICH COSTS WERE INCURRED.
```

```
+------------------------------------------------------------------+
|                                                                  |
|                  *** D I C T I O N A R Y - H E L P ***           |
|                                                                  |
|  VALUES                            MEANING                       |
|  ------------------------------    ----------------------------  |
|  AS                                ACADEMIC SUPPORT              |
|  AX                                AUXILIARY                     |
|  BLANK                             NOT SPECIFIED                 |
|  IN                                INSTRUCTION                   |
|  IS                                INSTITUTIONAL SUPPORT         |
|  PL                                OPERATION & MAINT OF PLANT    |
|  PS                                PUBLIC SERVICE                |
|  RR                                MAJOR REPAIRS & REHABILITATIO |
|                                                                  |
|  Lookup Value / . Menu  _____         |
|  Rule : IAFRS-FG-FS-PURP                  Default value is:      |
|  View : IAFRS-GENERAL-SUBSIDIARY-LEDGER                          |
|  Field: FG-FS-PURP                                               |
+------------------------------------------------------------------+
```

HMenu   **Not Used in FAMIS.**

Left   **Scroll Screen Left**
Some windows are made up of several adjacent panels. These will be designated by the word **Panel: ##** appearing in the window. Pressing this key scrolls the panel to the **left**.

Print   **Print Account Information**
Used to print account information from FAMIS using Entire Connection. See the FAMIS Entire Connection for Windows User's Manual for greater detail.

Right   **Scroll Screen Right**
Some windows are made up of several adjacent panels. These will be designated by the word **Panel: ##** appearing in the window. Pressing this key scrolls the panel to the **right**.

Bids and Commodities Screens List

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

An application of the Financial Records System (FRS). AP processes vendor payments and keeps track of financial activity involving vendors.

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.

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.

C **Capital**
Assets, cash, means, property, resource.

Cash
Coins, currency, checks, and anything else a bank will accept for immediate deposit.

Cash Disbursement
A non-vouchered 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.

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.

D

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.

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.

E

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.

F

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.

File
A storage area established within a computer system or database for organizing similar kinds if 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.

G

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.

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.

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).

S

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.

T

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.

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.