STANDARDIZED PREQ PROCESS

In Current Schedule, highlight the Work Order and double-click to go directly to the Work Order form.

Click on PO’s tab

Click the Order button

Click on Create PREQ button

Right next to **ASSIGNE** block enter: Vendor Name & brief description of work scope

Tab to next block, FAMIS will populate Requested by based on employee logged in

Review PURCHASE TYPE: Inventory, ServiceOn, or ServiceOff – NO LONGER USE JUST SERVICE

A. Inventory – when goods or materials are required; use purchase level sheet to determine buyer used.
B. ServiceON – ServiceON PRQ requests that are for labor and the purchase of materials/parts will have a minimum of two lines. One for labor costs and one for material/part cost. If there is more than one part needed create additional lines for each part. When service request is to be performed ON campus by vendor or subcontractor, you are required to submit a Crew Terms & Conditions form to the buyer when PRQ is submitted. All requests go to buyer # 0146229 regardless of cost. Be sure to follow Purchase Levels sheet to determine paperwork and quote specifications required. * NOTE
C. ServiceOff – ServiceOff PRQ requests that are for labor and the purchase of materials/parts will have a minimum of two lines. One for labor costs and one for material/part cost. If there is more than one part needed create additional lines for each part. When a service request is NOT performed on campus. Use purchase levels sheet to determine what buyer receives PRQ and what documentation requirements are needed. ServiceOn/ServiceOff are not considered LP requests, they must have an ESTIMATED price. **NOTE

*NOTE: PO will not be created until all required documentation has been received by the buyer and vendor is not authorized to work on campus until all UND Terms & Conditions are met, contact Jeff or Dianna to verify prior to work start if not sure.

**NOTE: Do not change this once a line is added to the PREQ, if incorrect you will need to cancel request and start over.

**NOTE: Status will change to REQUESTED if the PREQ total cost is over the requester’s purchasing limit, and buyer will not have visibility until approved by supervisor.

Click add line button:

LINE ITEM FORM:

Date Required: Needs to be filled in...

Part Number: Enter appropriate part number

Examples: 1.SUD

- 1 = UND
- 2 = 2 digit alpha Crew
- D = Direct

Vendor NO: enter 10 digit vendor code, you can search vendors by clicking on vendor button

Vendor P/N:

Buyer: 0303382 – Inventory and ServiceOff up to $999.99 **NOTE: no exceptions to this requirement

0146229 – Inventory => $1000 and ALL ServiceOn request
Description: MUST INCLUDE THE FOLLOWING AND PLACE ALL ON ONE LINE IF POSSIBLE

- (LP), if local purchase applies to this, the first three items below are still required at the time the request
  is submitted.  Vendor Part # and Name will be added before the invoice is forwarded to warehouse for PO
  processing.
- Work order #,
- Initials of requester/2 digit Crew,
- Part Name of item requested,
- Location of work (building name/room#)
- Crew picking up or item being delivered,
- If ServiceOn/ServiceOff is requested type “ESTIMATED PRICE USE” or “QUOTED PRICE” on last line of
  description.

**NOTE:** If it is a kit or assembly that has more than 1 part, please list all items included

UOP: Should equal Unit of Measure UND uses

Quantity: Number requested (not just 1 every time)

Price: should be for the cost of 1 each

Amount: will auto calculate pricing for this line off the quantity and unit pricing.

Click OK – this will add this line to PREQ

** Click add line for each different item requested, each part # should have a separate line not a generic line **

Click Save to submit

SCREEN SHOT EXAMPLES: