

# Creating a Pre-Encumbrance in FAMIS Portal

The screenshot shows a web browser window with the address bar containing the URL <https://dfoforms.nycenet.edu/FamisPortal/>. The page features the FAMIS logo in the top left, the date and time '10/11/2007 12:18:27 PM' in the top right, and navigation links for 'Mayor's Office', 'DOE', 'DFO', and 'Portal News'. Below these are icons for home, clock, and help. The main content area is a blue-themed login box with two input fields labeled 'User ID' and 'Password'. Below the fields are two buttons: 'Sign In' and 'Change Password'. At the bottom of the page, there are links for 'What's New?', 'Send Feedback', 'Contact Us', and 'Version 2.4'.

# Step 1: Log into FAMIS

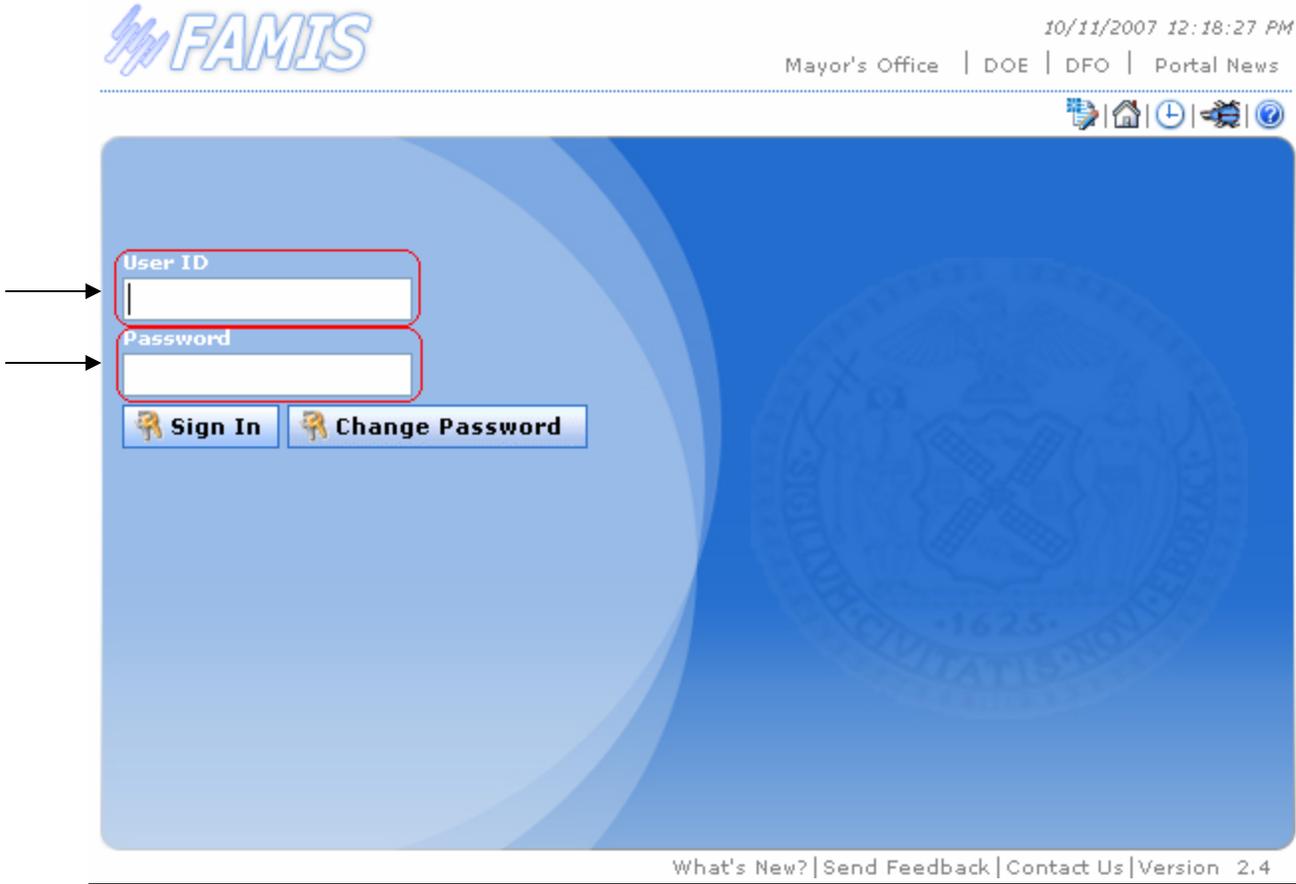


Figure 1

Step 2: Select Purchasing & Payments from the menu on the left side of the page

→ from the drop-down menu, select Pre-encumbrance

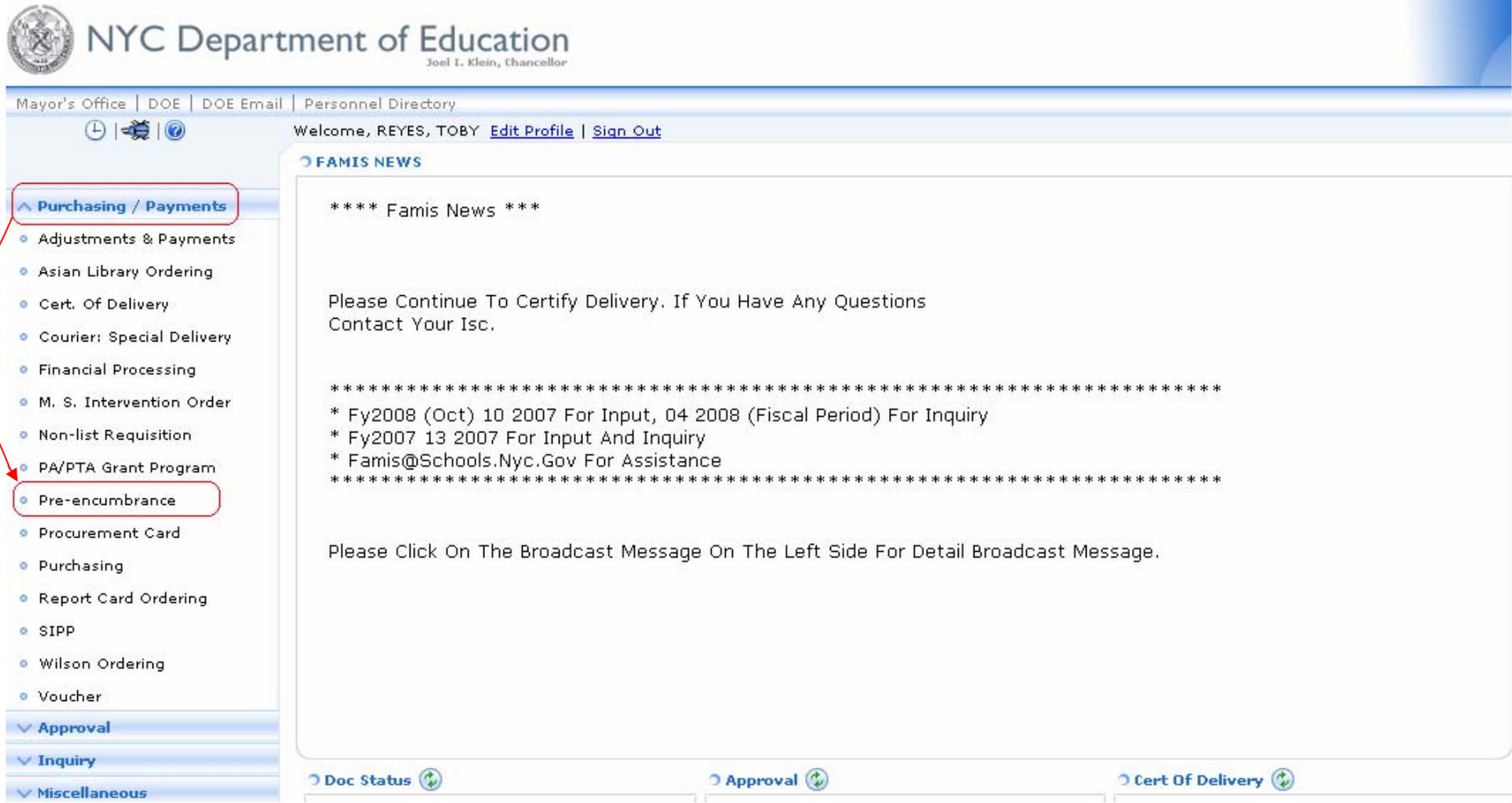


Figure 2

### Step 3: Enter appropriate budget information (details on page 5)

Pre-Encumbrance

[CHANGE NOTICE](#)

**Vendor Information (Optional)**

Vendor #:  [Retrieve](#) [Search By Name](#)

**Accounting Information**

Fiscal Year:

Suffix	District	Quick	Object	Location	Activity	Amount	Balance	
01	<input type="text" value=""/>	<input type="text" value="\$500,000.00"/>	\$13,443,893.45	<a href="#">Remove</a>				

Total Amount:

[Add Line](#) [Calculate](#)

**Additional Information (Optional)**

[Submit](#) [Restart](#)

Figure 3

### Required Fields in Figure 3

District - Enter applicable District

Quick - Enter applicable Quick code (a list of Quick codes are provided for each district by clicking on the search icon on the near right)

Object - Enter applicable Object code (a list of Object codes are provided by clicking on the search icon on the near right)

Location - Enter applicable Location code

Activity - Enter applicable Activity code

Amount - Enter appropriate Amount for the line

### Optional Fields in Figure 3

Additional Information - Although optional, it is recommended that the user enter information about what the PE is intended for (tracking purposes).

Vendor - If completed, the encumbrance will have to be to the same vendor. Leaving the field blank is fine.

- After all the data above is entered, click the  button.
- In the **Balance** field, the balance of the Spending Plan will be displayed, i.e. -  \$13,443,893.45
  - (if the line amount of the Pre-encumbrance is *greater than* the balance of the Spending plan, an error will occur)
- To create a multi-line Pre-Encumbrance, click the  button and follow the same process as detailed on the top of this page.
- Once complete, click the  button.

After the Submit button is pressed, a screen will pop-up with the Pre-Encumbrance# (Figure 4), indicating that the document is being processed. Once the document is processed, another screen will show that the document either Posted or Failed.

**Document Information - WJ0800811** [ close ]

Status Code	Description	Date	User
17	FAMIS Submission Successful	10/11/2007 11:19:39 AM	FAMIS SYSTEM
19	FAMIS Post in Progress	10/11/2007 11:19:39 AM	FAMIS SYSTEM
7	City Successfully Submitted Document	10/11/2007 11:19:35 AM	FAMIS SYSTEM
3	City Acknowledgement Received	10/11/2007 11:19:26 AM	FAMIS SYSTEM
2	Document Sent to City	10/11/2007 11:19:18 AM	FAMIS SYSTEM
1	Document Ready for City	10/11/2007 11:19:18 AM	FAMIS SYSTEM
20	FAMIS Validation in Progress	10/11/2007 11:19:16 AM	FAMIS SYSTEM
0	FAMIS Validation Pending	10/11/2007 11:19:03 AM	TREYES

**Status:** FAMIS Submission Successful Refresh

Figure 4

- If the document **Posted**, the Pre-Encumbrance is done. (To review the details, follow figures 5 and 6)
- If the document **Failed**, the document can be retrieved, corrected and resubmitted from the Document Status screen (figures 5 and 6). If the errors cannot be fixed or understood, please contact Client Services for assistance at [Purchasingportal@schools.nyc.gov](mailto:Purchasingportal@schools.nyc.gov) or call 718-935-4444.

Mayor's Office | DOE | DOE Email | Personnel Directory

Welcome, REYES, TOBY [Edit Profile](#) | [Sign Out](#)

**FAMIS NEWS**

\*\*\*\* Famis News \*\*\*

Please Continue To Certify Delivery. If You Have Any Questions Contact Your Isc.

\*\*\*\*\*  
 \* Fy2008 (Oct) 10 2007 For Input, 04 2008 (Fiscal Period) For Inquiry  
 \* Fy2007 13 2007 For Input And Inquiry  
 \* Famis@Schools.Nyc.Gov For Assistance  
 \*\*\*\*\*

**Navigation Menu:**

- Purchasing / Payments
- Approval
- Inquiry
- Miscellaneous**
  - Book Buyback
  - Broadcast Message
  - Document Status**
  - Stop Payment Form
  - Vendor Rating System

Figure 5

[View Contracts](#)

### Document Status

Search By: Document Number Criteria:  [Search](#) [Advanced Search](#)

**All (4)** | Posted (3) | Awaiting Approval (0) | Failed (1) | Deleted (0)

Doc Number	Status	Create Date	Vendor	Total	Action
	FAMIS Submission Successful	10/11/2007			   
	FAMIS Submission Successful	10/11/2007			   
WJ0800811	FAMIS Submission Successful	10/11/2007		\$1,700,000.00	   
	City Rejected Document for Validation	09/28/2007			   

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Click this Edit icon if the document failed. This will allow you to edit the document and resubmit

This icon will display all the detail concerning this document, including what errors occurred (if any)

Figure 6