ADVANCED MATERIALS MANAGEMENT SYSTEM (AMMS) USER'S MANUAL

AMMS User's Manual

Part A

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AMMS ORDER MANAGEMENT TRAINING SCRIPTS

AMMS TRAINING SCRIPT

Add a line to a Oracle Sales Order

Purpose

The purpose of this training script is to show you how to add a line to an existing open sales order.

The item that you want to be added to the sales order must be on the Price List. Please follow adding items to Price List script for this step.

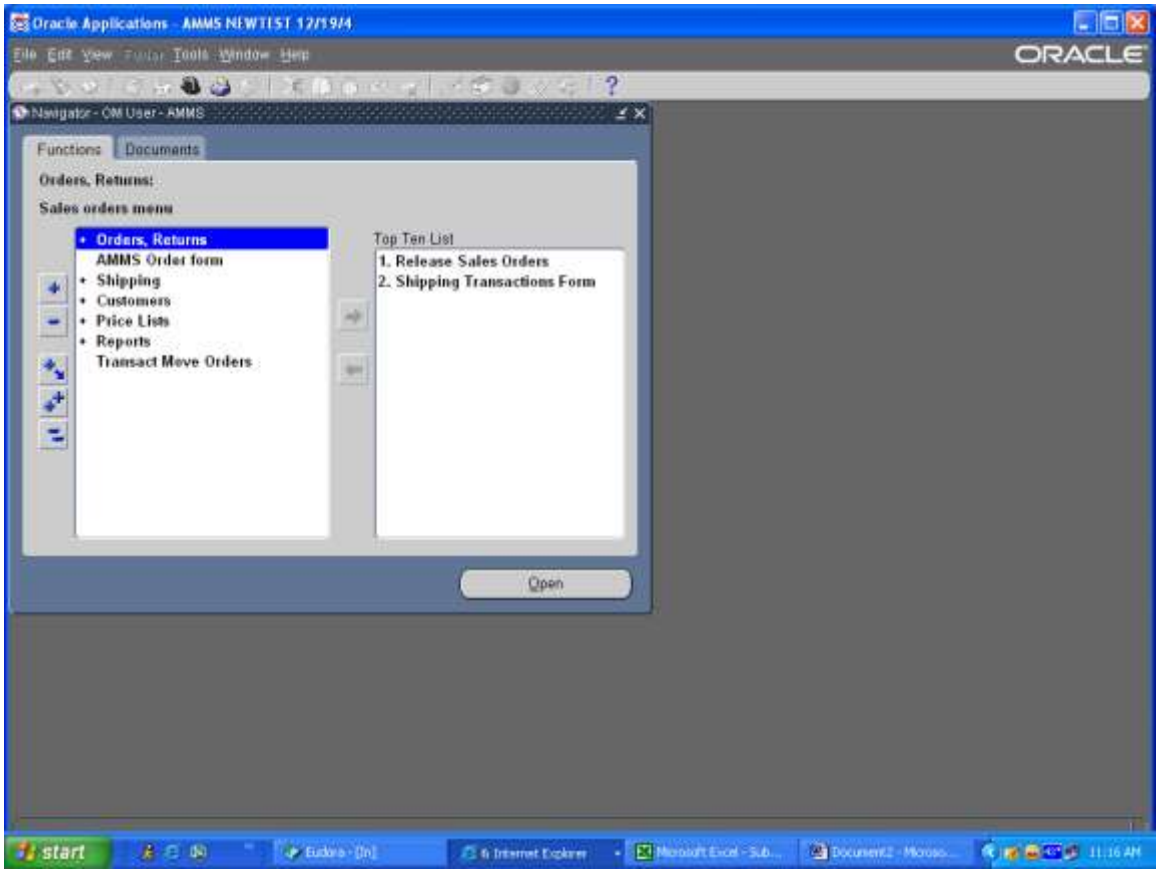
Audience

Material Coordinators and Supply Technician Team Leads

Prepared By	Theresa Coulson
Creation Date:	01/11/2005
Document Name	Add a line to an Oracle Sales Order.doc
Version	5
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Order Management.	

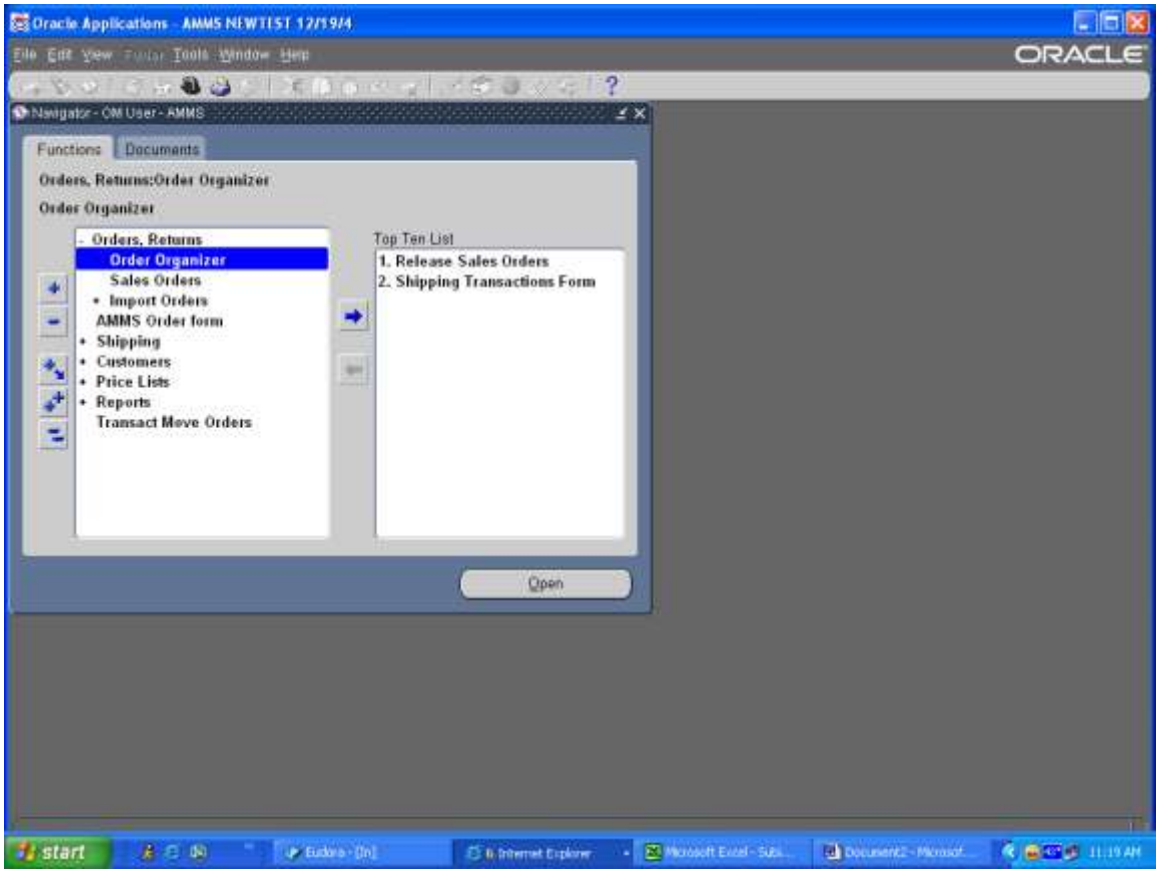
Step Description: Sign onto Oracle and select OM User AMMS responsibility

Expected Results: You will be at the OM User AMMS main menu



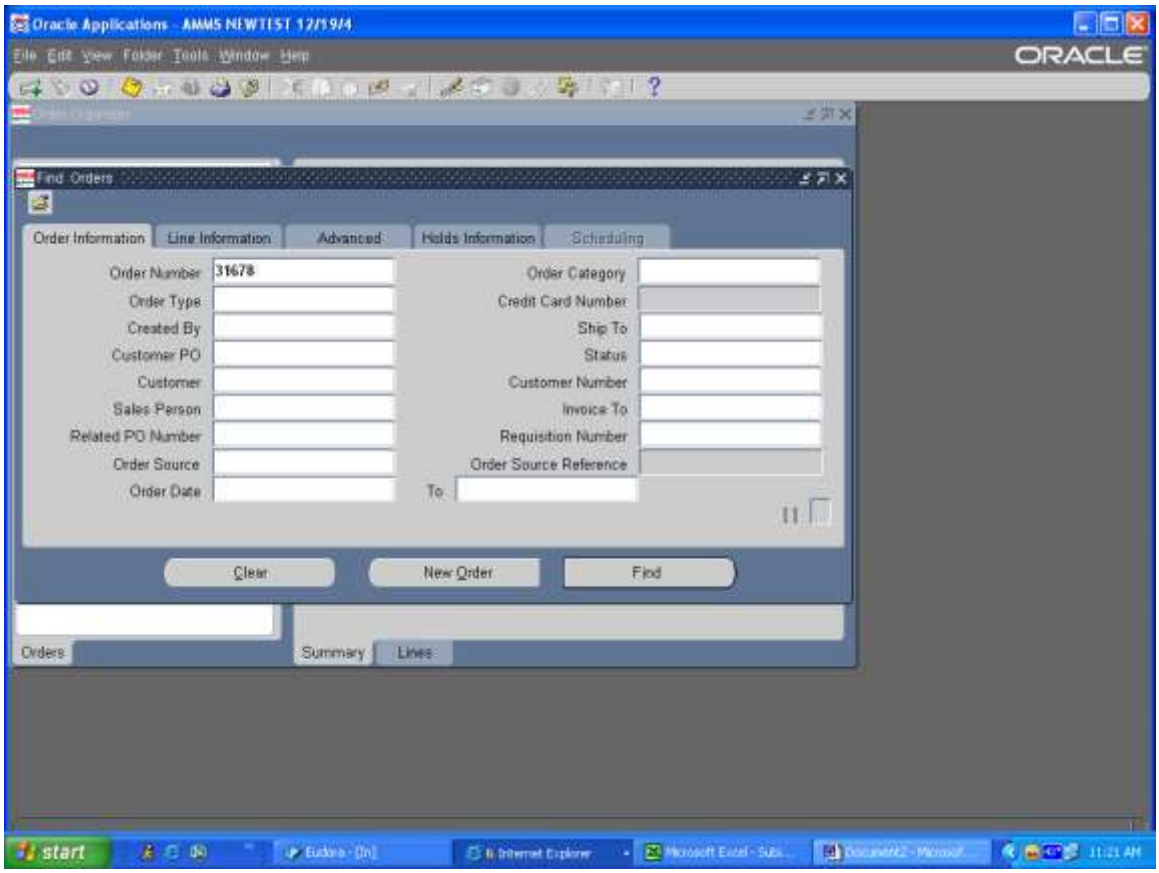
Step Description: Open Order Returns > Order Organizer

Expected Results: You will be at the Find Orders window



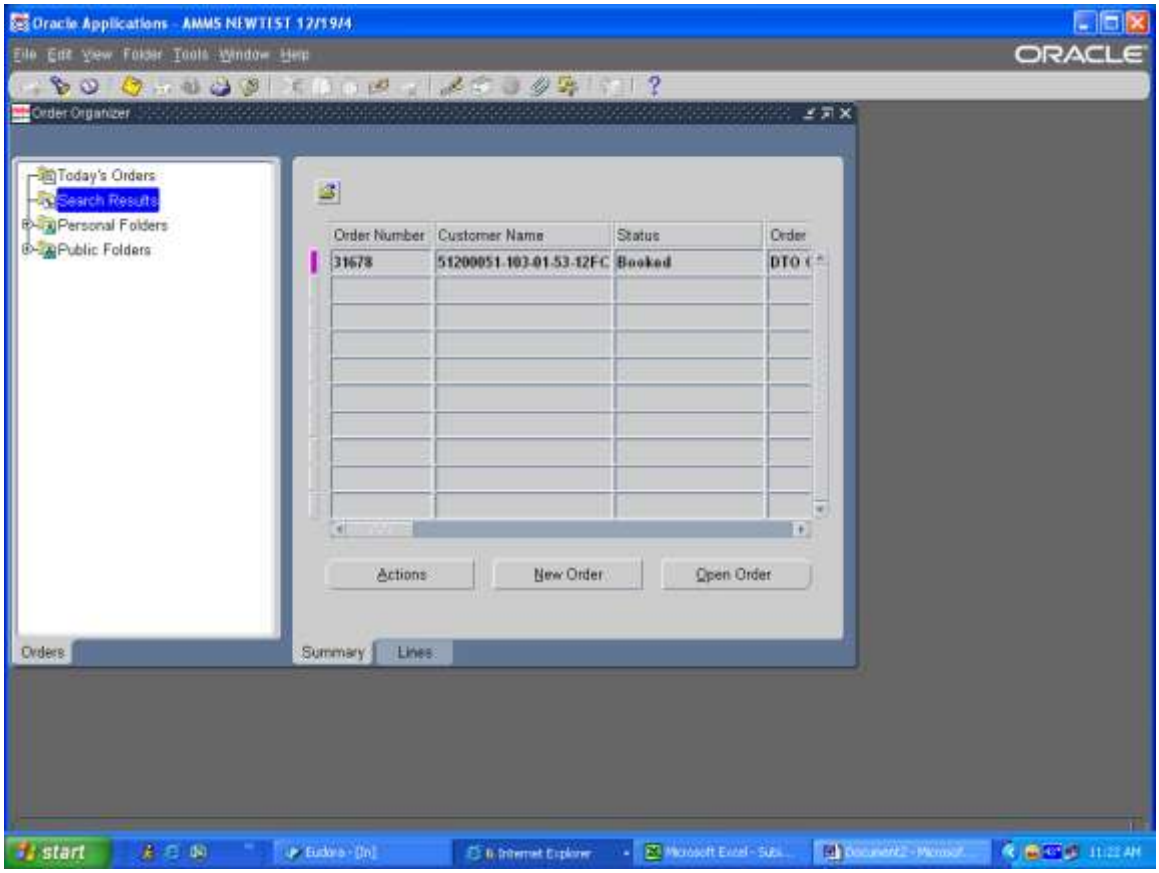
Step Description: Enter the sales order number that you want to add a line to, click on the Find button.

Expected Results: Order Organizer window will appear



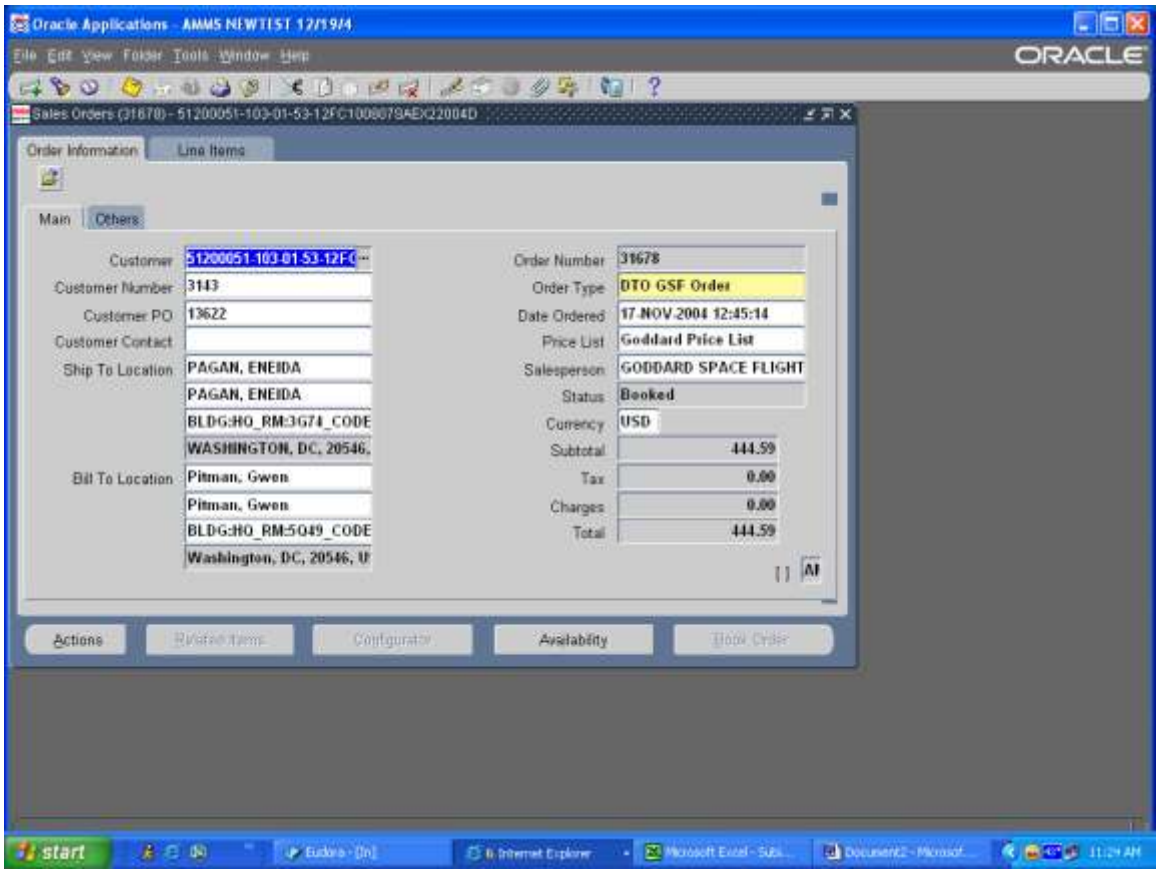
Step Description: Click on the Open button and open the sales order

Expected Results: Sales Order window will appear



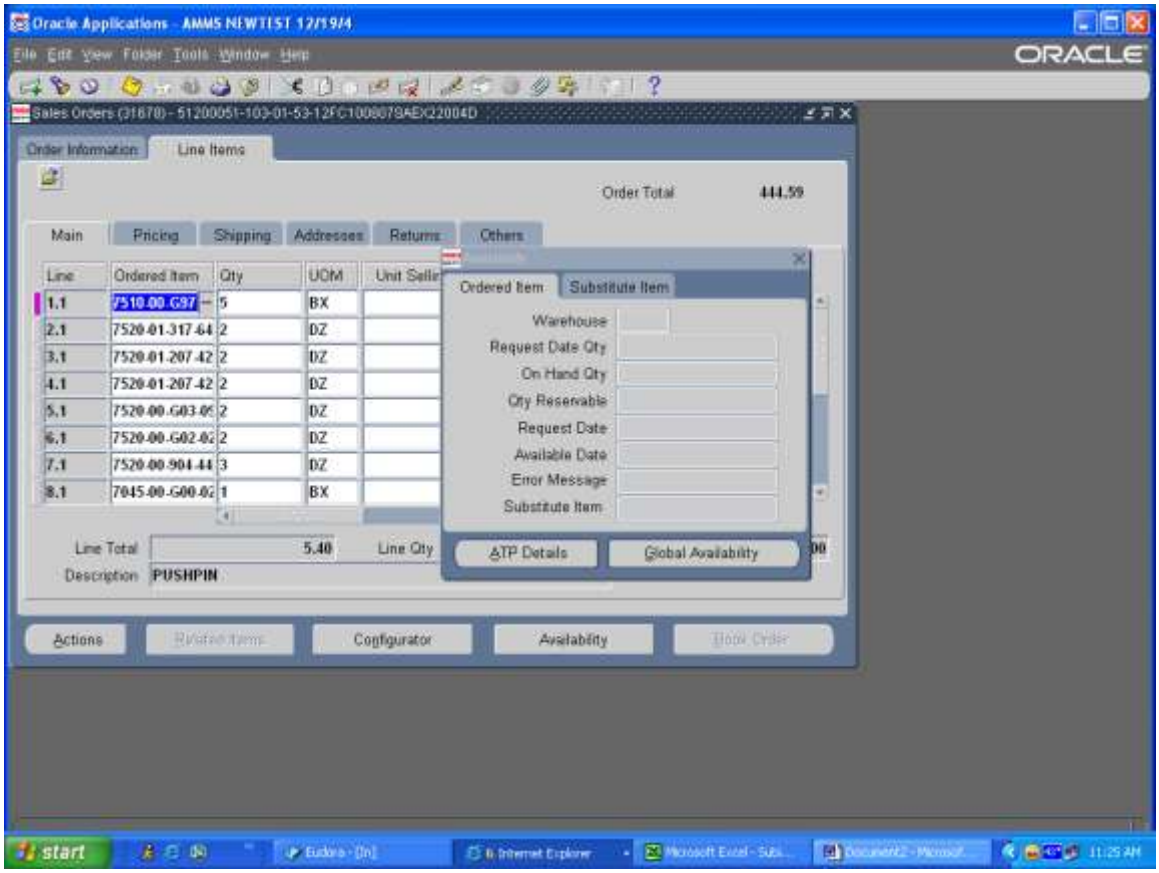
Step Description: Verify that the Sales Order information is correct, Customer Name, then click on the Line Item tab

Expected Results: Window view will change, Availability window will appear



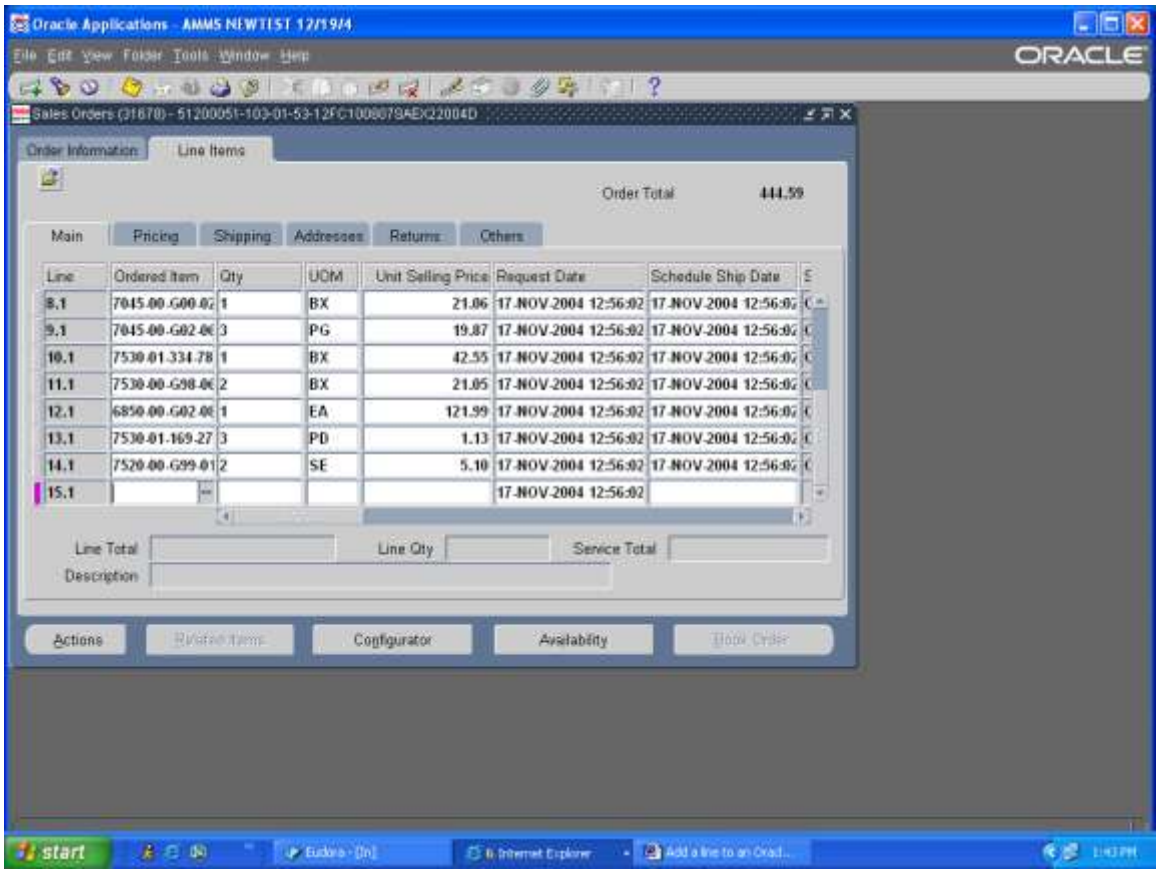
Step Description: Close the Availability window

Expected Results: Window will go away, you will be at the Line Items tab



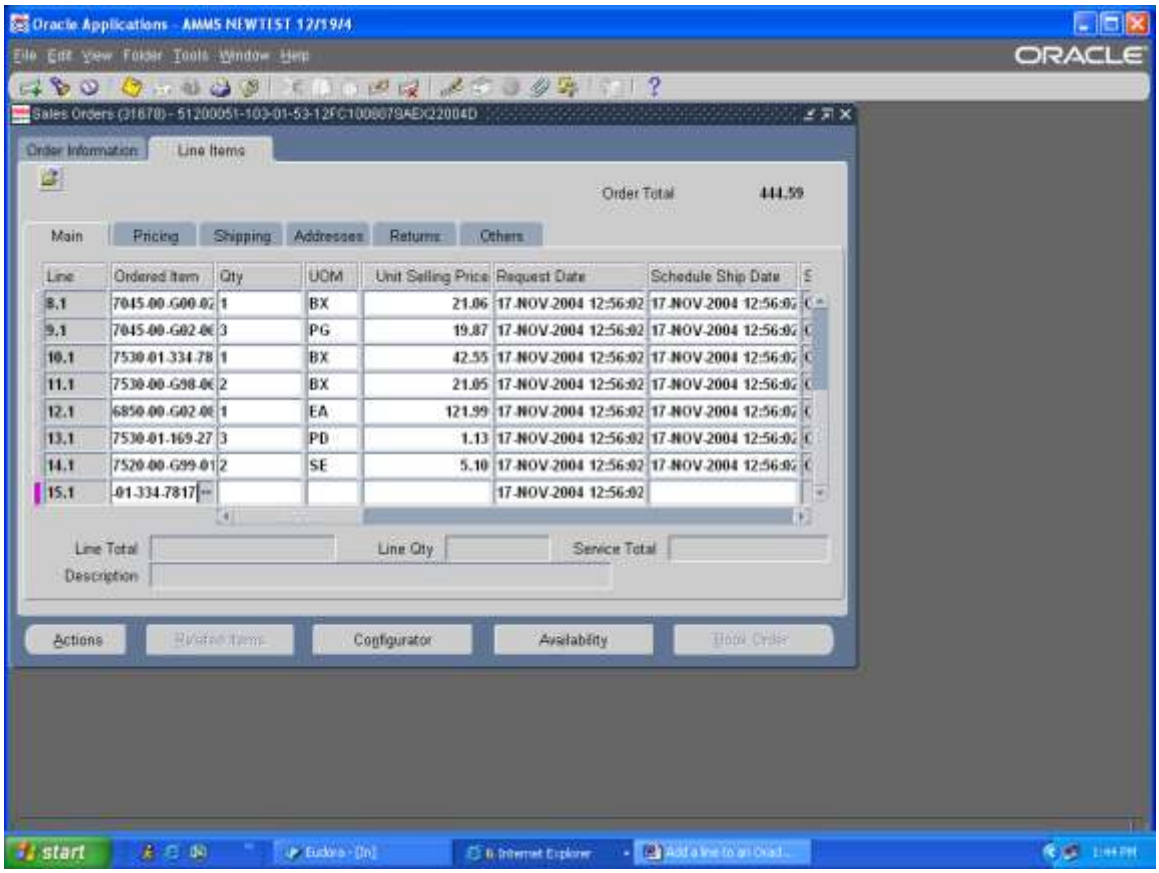
Step Description: Go to the last line on the sales order, hit your Down Arrow on your keyboard, and a blank line will appear.

Expected Results: A blank line will appear



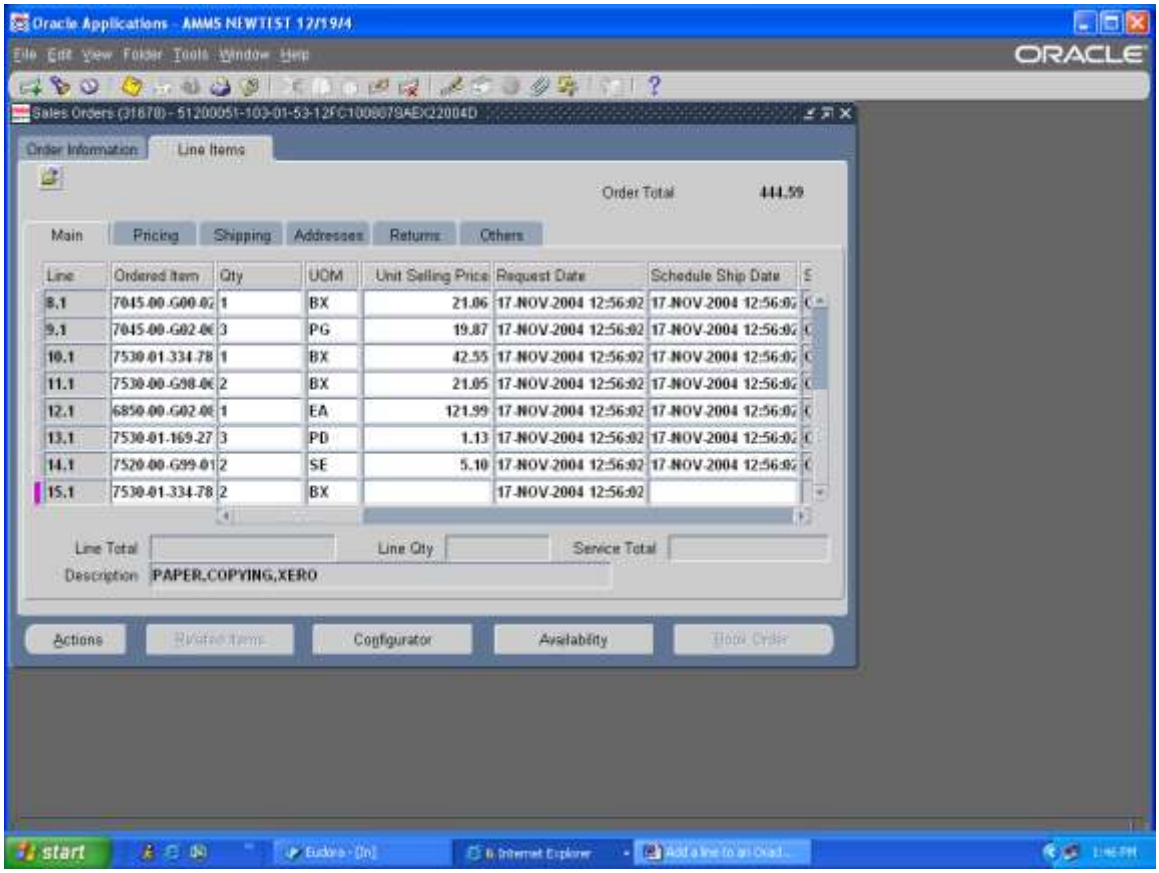
Step Description: In the Ordered Item field enter the stock number for the item that you want to add.

Expected Results: Field will be populated



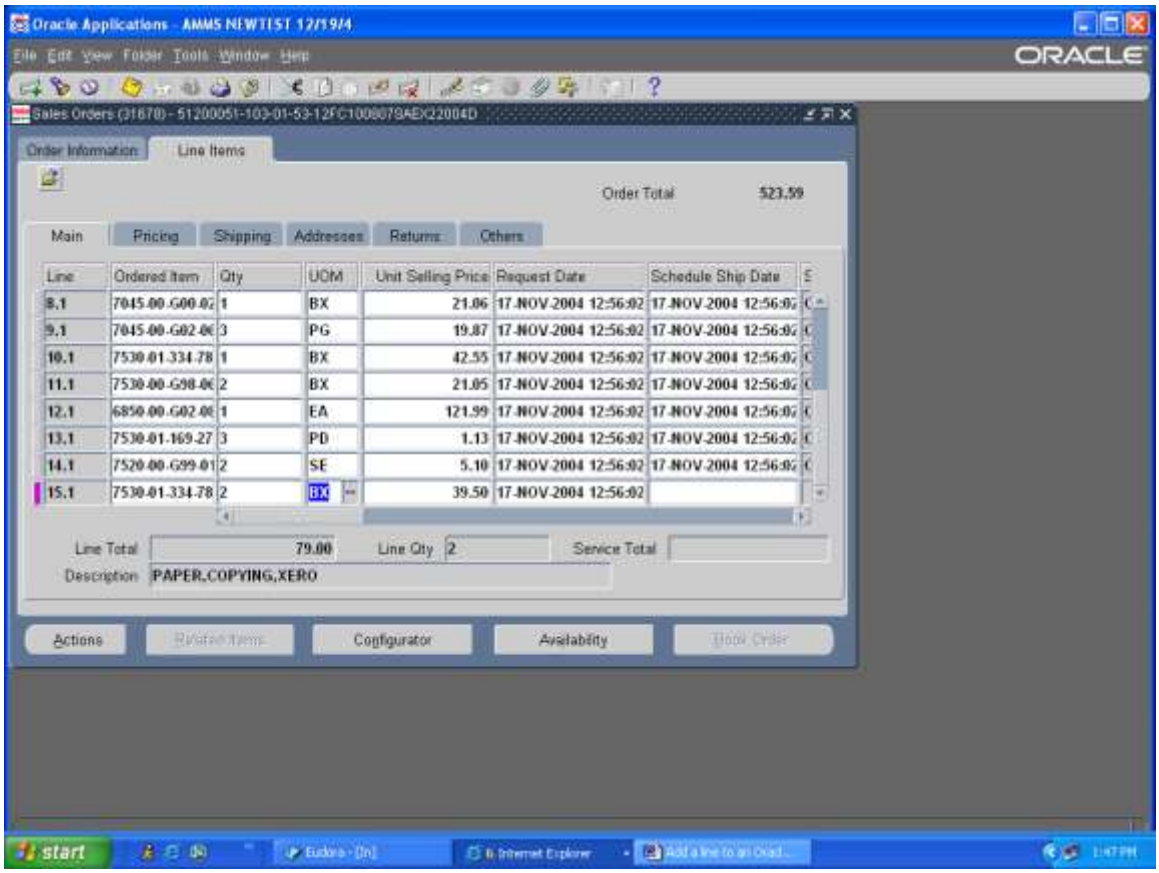
Step Description: Tab to the quantity field and enter the quantity

Expected Results: Field will be populated



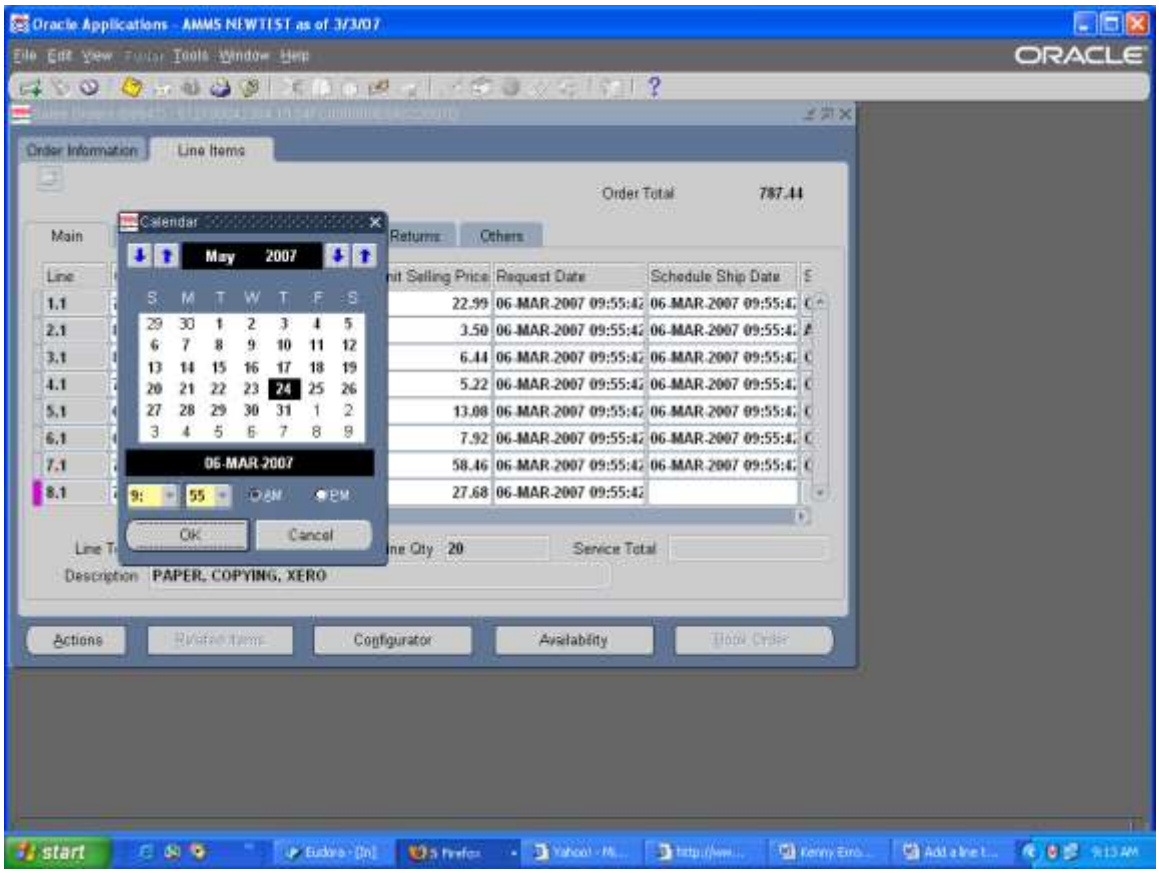
Step Description: Hit the Tab button. The price should default. If you need to change the cost now is the time to do so.

Expected Results: Price field will be populated



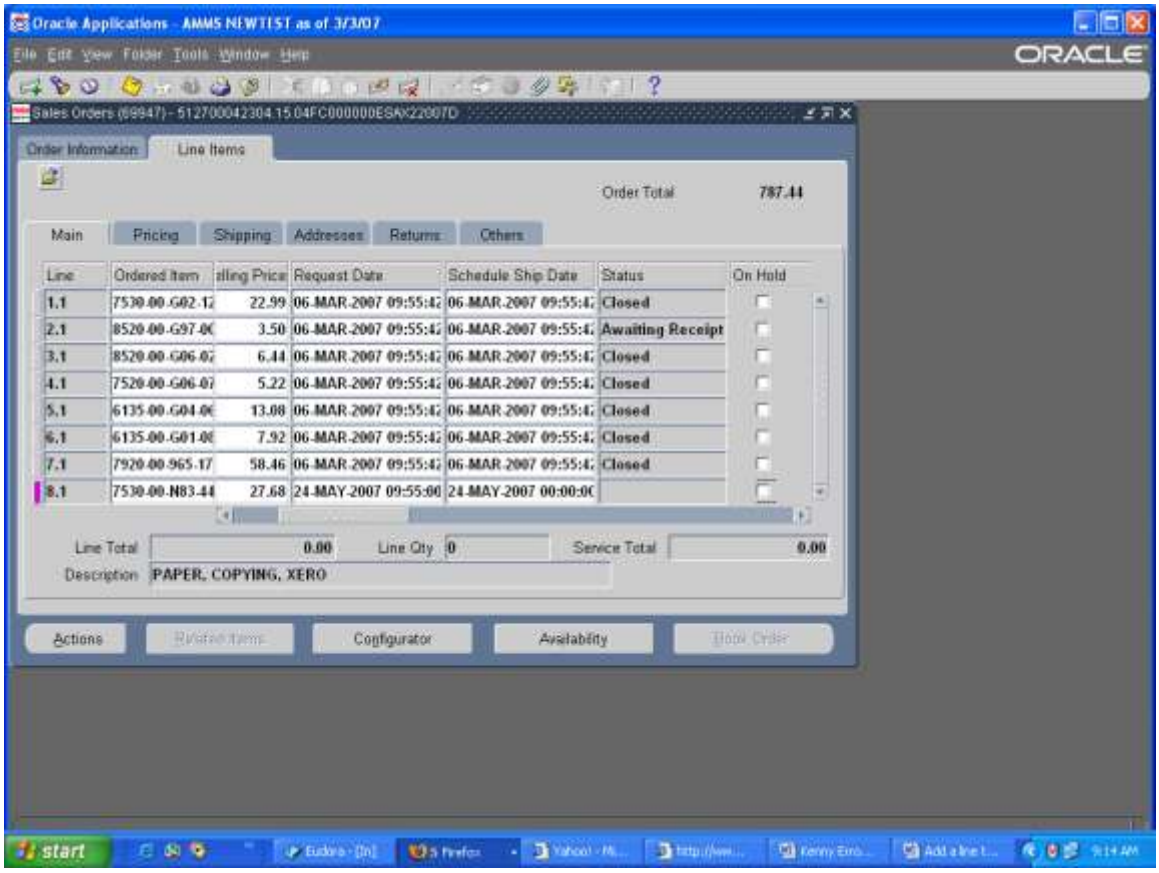
Step Description: Tab to the Request Date field, this field will already be populated with the original sales order date, click on the LOV and select the date that you are adding the sales order line

Expected Results: Date will change



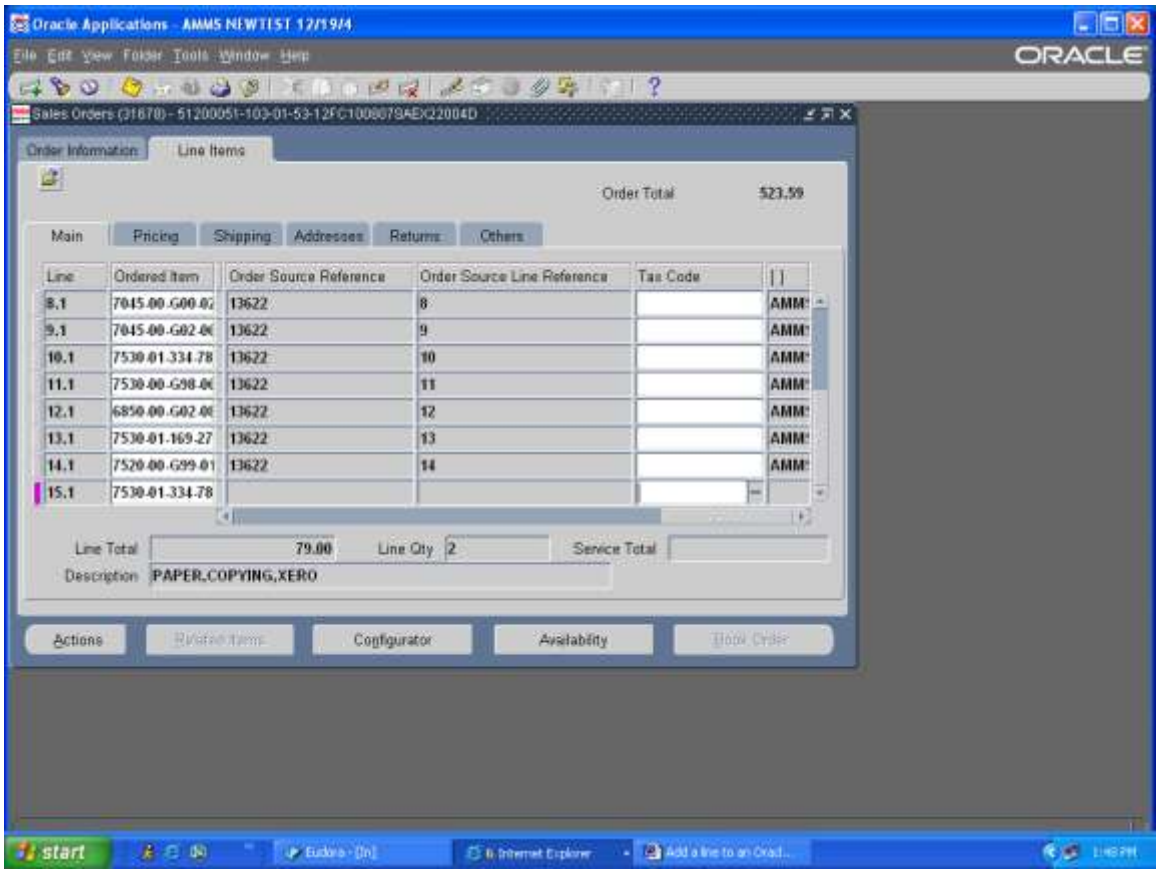
Step Description: Tab to the Scheduled Ship Date field and update this field with the date that the sales order line is being added.

Expected Results: Field will be populated with date



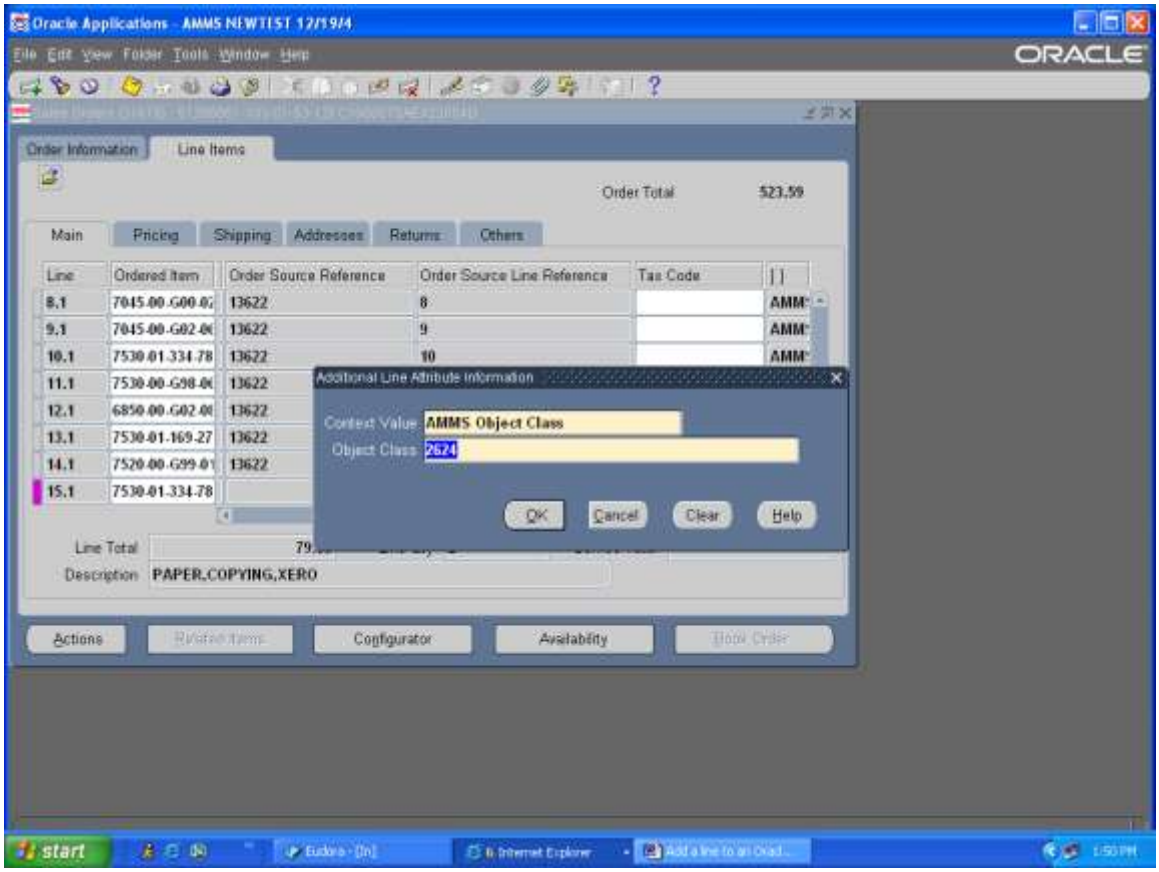
Step Description: Use the scroll bar and move to the end of the Main tab. Go to the field with [ ]. Click in this box.

Expected Results: Additional Line Attribute window will open



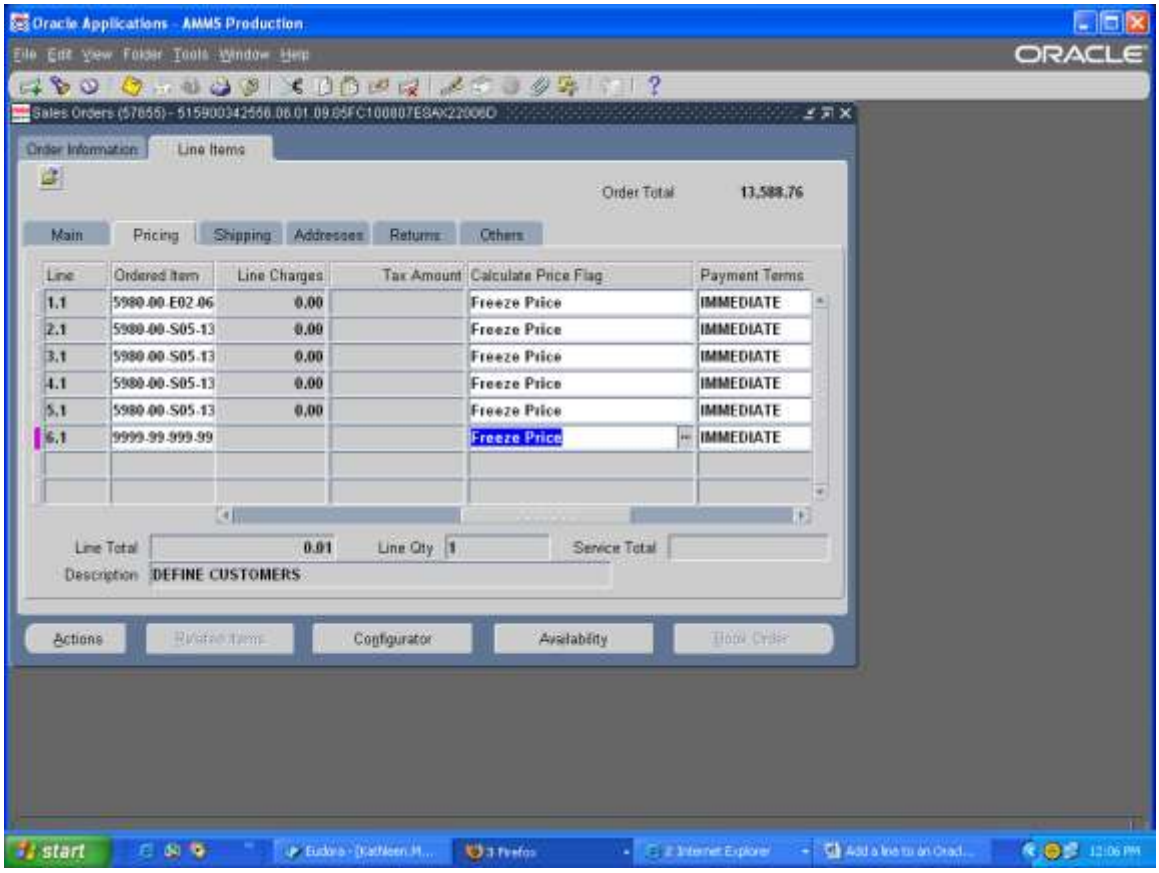
Step Description: Click in the Object Class field and enter the CORRECT Object Class for the item. The Object Class is determined by the first 2 digits of the item number. See list provided. Click Ok to the Additional Line Attribute Information window.

Expected Results: You will return to the Sales Order window



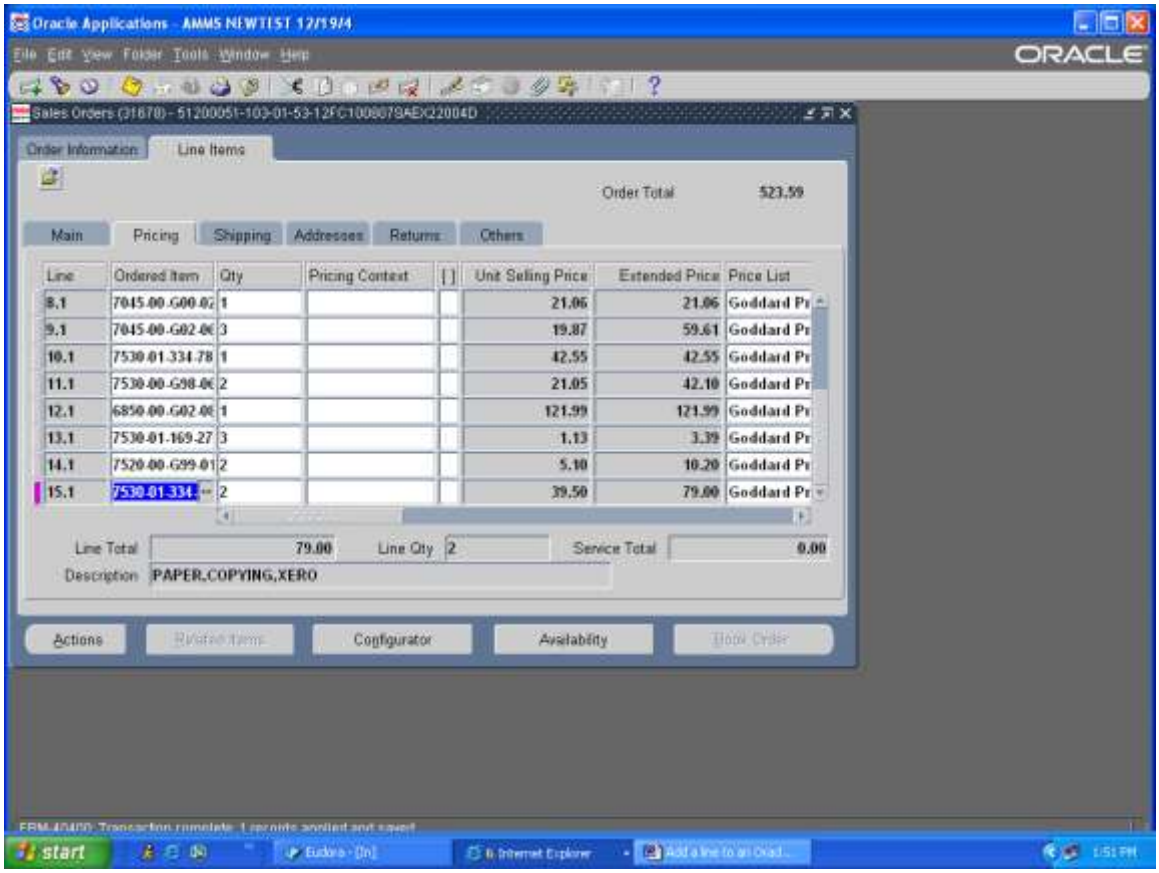
Step Description: Move to the Pricing Tab, move to the Calculate Price Flag field and click on the List of Values and change to Freeze Price

Expected Results: Field will be updated



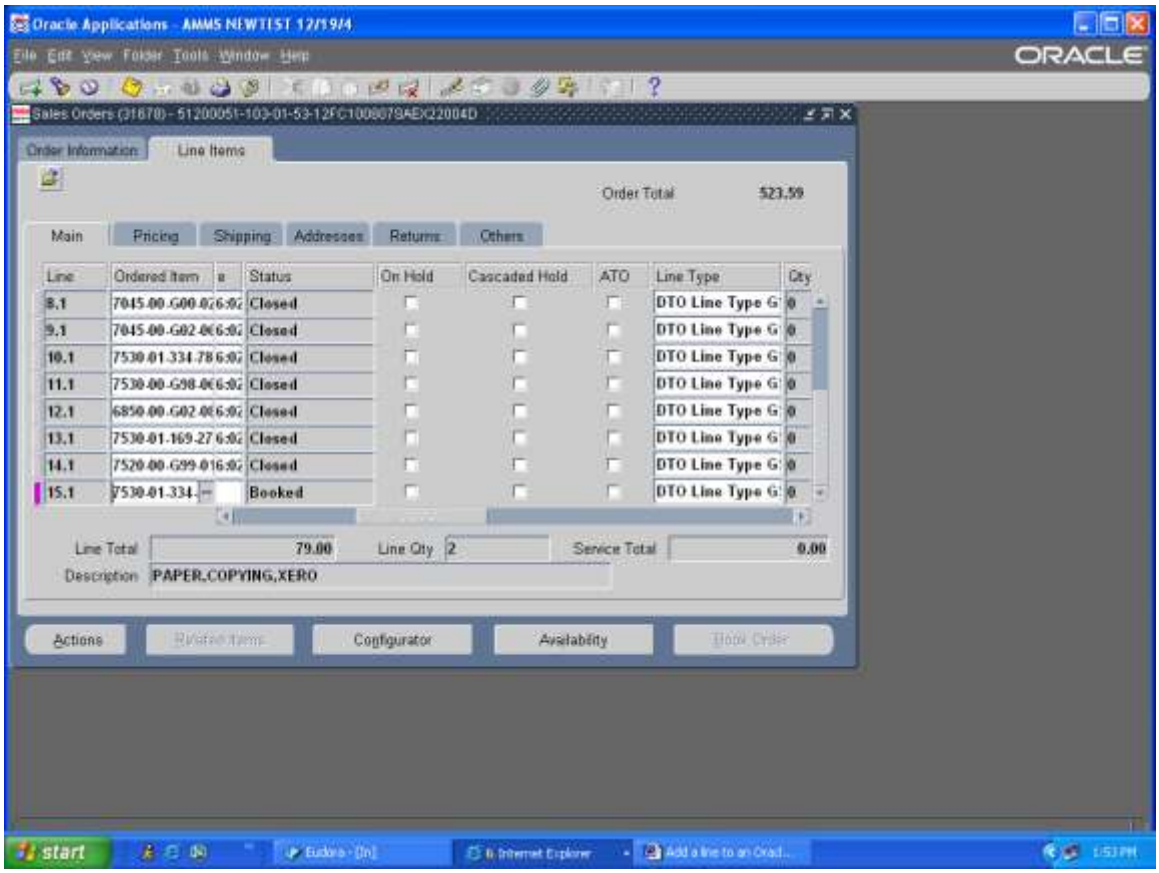
Step Description: Save Your work

Expected Results: Transactions applied and saved message



Step Description: Click on the Main tab at the Sales Order screen, use the scroll bar and move to see the Line Type and Status. The Line Type should be DTO and the status should be Booked. Once the order goes through "workflow" the status will change from Booked to Awaiting Receipt.

Expected Results: Field will have data



Step Description: If a purchasing requisition is needed immediately contact Theresa Coulson. As soon as Requisition Import runs you will have a requisition for this line on the sales order.

AMMS TRAINING SCRIPT

ADDING ITEM TO PRICE LIST

Purpose

The purpose of this training script is to show users how to add new items to the Price Lists for Goddard and Wallops.

Audience

Material Coordinators and Supply Technician Leads

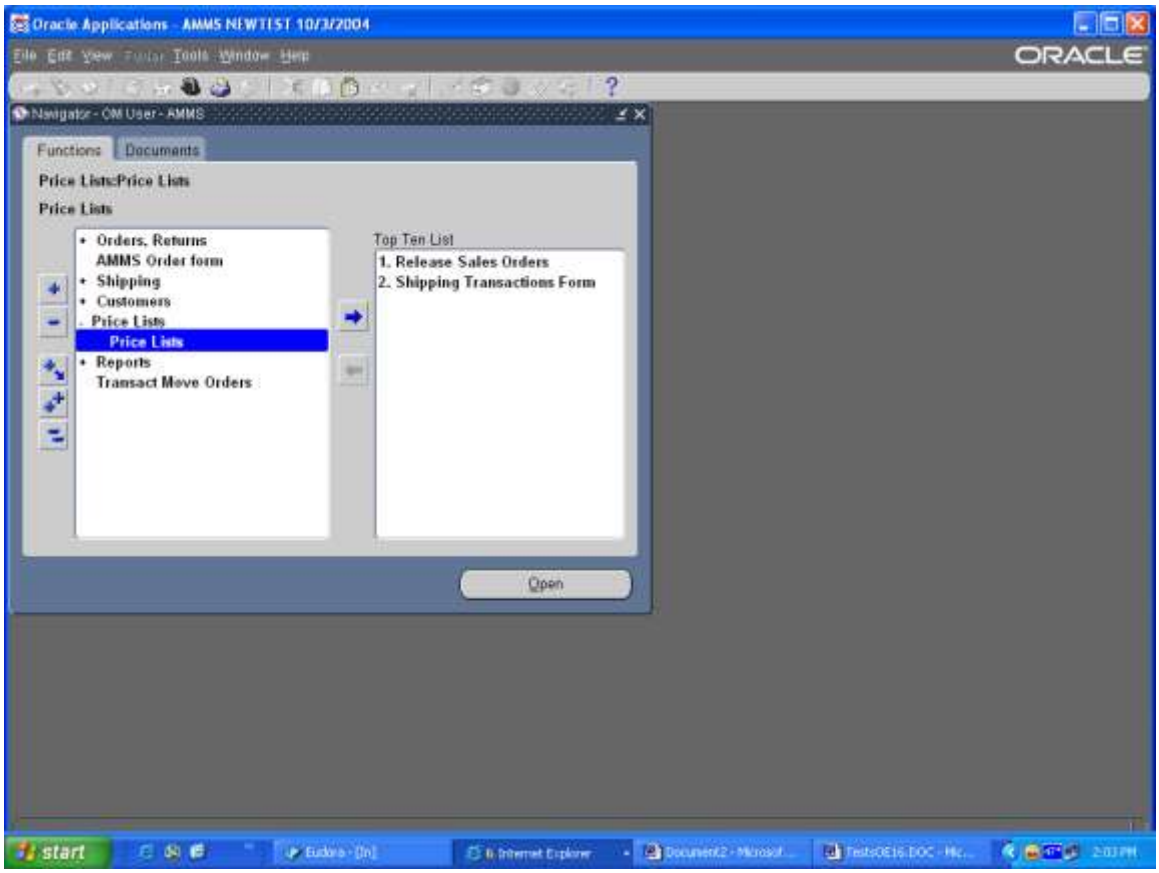
Prepared By	Theresa Coulson
Creation Date:	11/09/2004
Document Name	Adding Items to Price Lists.doc
Version	x
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Order Management.	

Step Description: Sign onto Oracle and select the OM User responsibility

Expected Results/Actions: The OM User main menu will appear

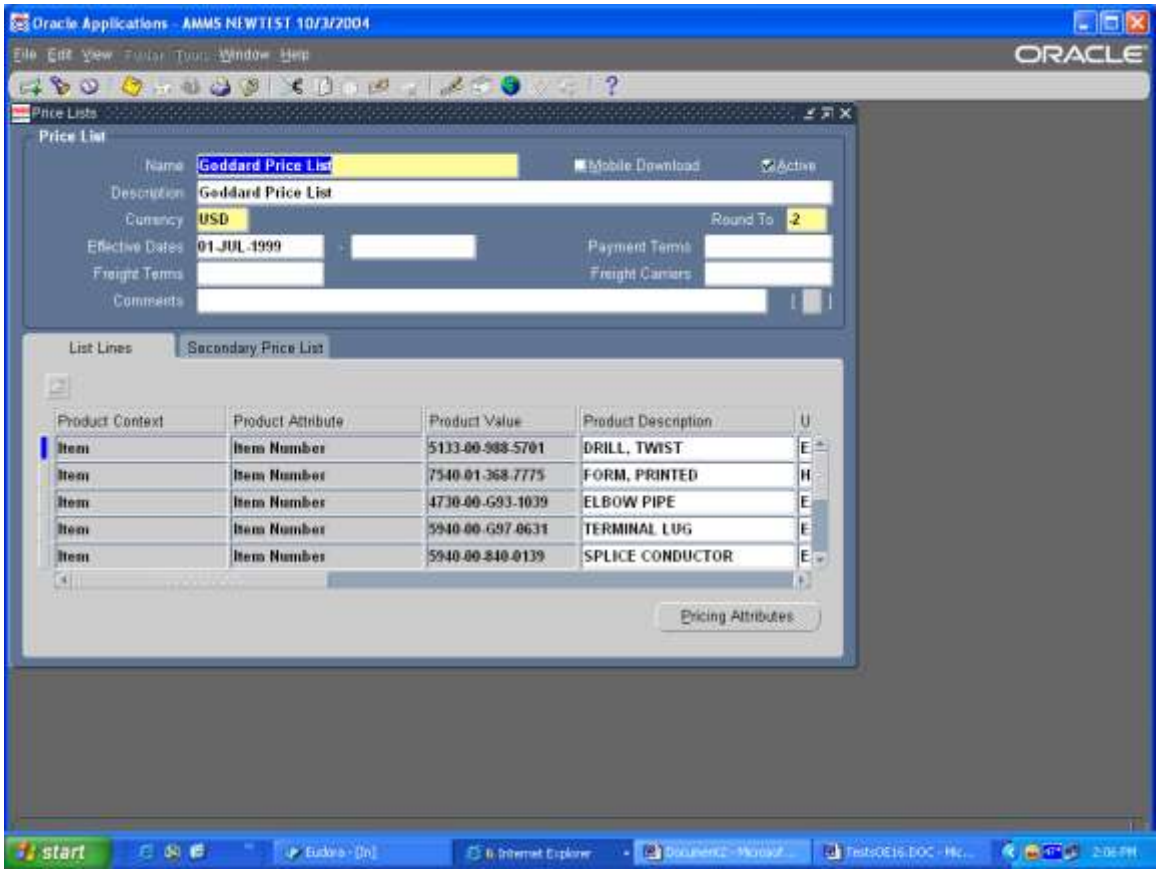
Step Description: Select Price Lists > Price Lists from the menu click on Open

Expected Results/Actions: A blank Price List will appear.



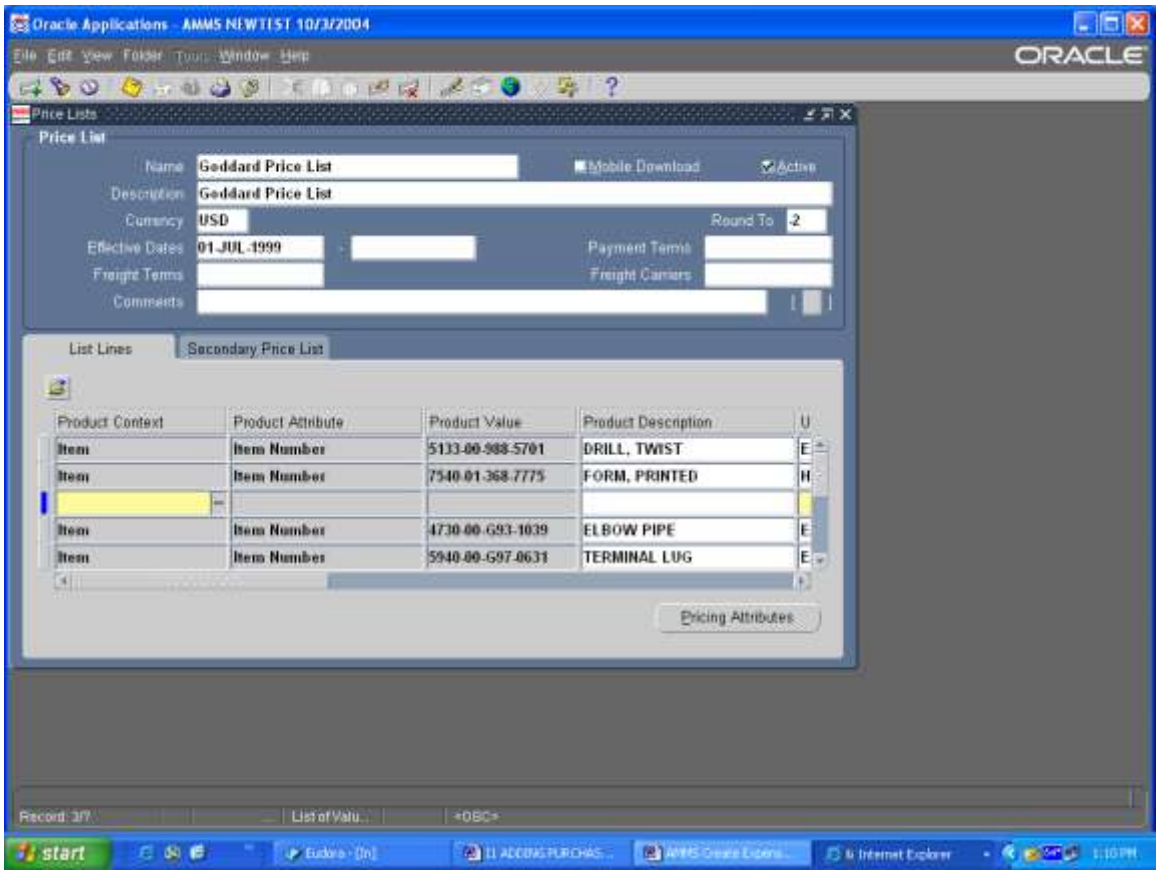
Step Description: Query up the Price List hit the F11 button on your keyboard, then hold down the Ctrl button and hit F11 again to end the query.

Expected Results/Actions: The Goddard Price List will appear



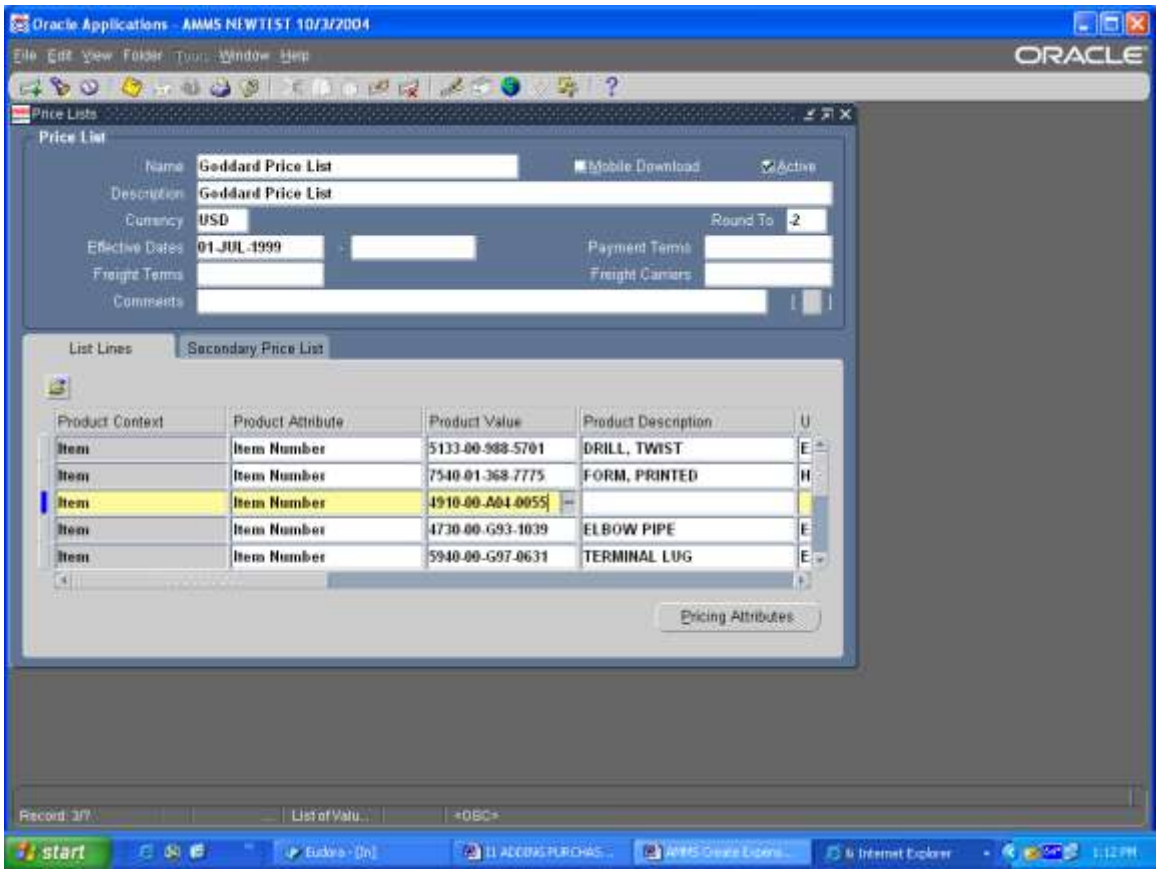
Step Description: At the bottom of the Goddard Price List, in the List Line section, click on an occupied line then click on the green plus sign (+) on the tool bar to add a new line, make sure you are at the bottom of the screen.

Expected Results/Actions: A blank line will appear and the Item field will be yellow



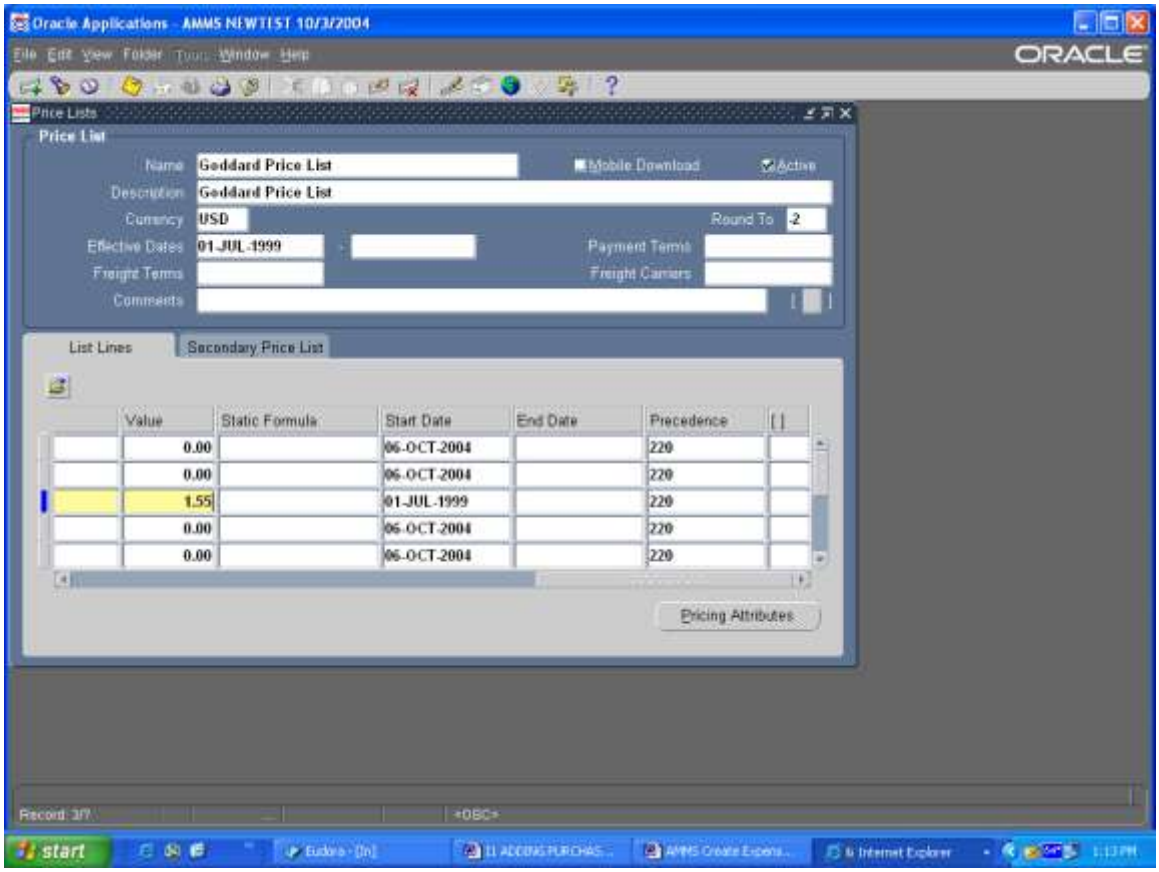
Step Description: In the Item field click on the LOV and select Item from the list, tab to the Product Attribute field and click on the LOV and select Item Number from the list. In the Product Value field enter the Item number you just loaded.

Expected Results/ Actions: All fields will be populated



Step Description: Tab over to the value field and enter the cost for the item. Example: 1.55

Expected Results/ Actions: Field will be populated with cost.



Step Description: Save your work and close all forms, Repeat the same process for the Wallops Price List.

Expected Results/Actions: Transactions Complete and Applies message at the bottom of screen, and will return to OM USER main menu.

This stock number is now loaded and on the Price List.

Notes: Expense item are not Inventory items, they can not be transacted against like other item numbers.

All Expense items must be added to both Price Lists. The sales order can not be created until the items are on the price lists.

AMMS TRAINING SCRIPT

Approval Hold on Item

Purpose

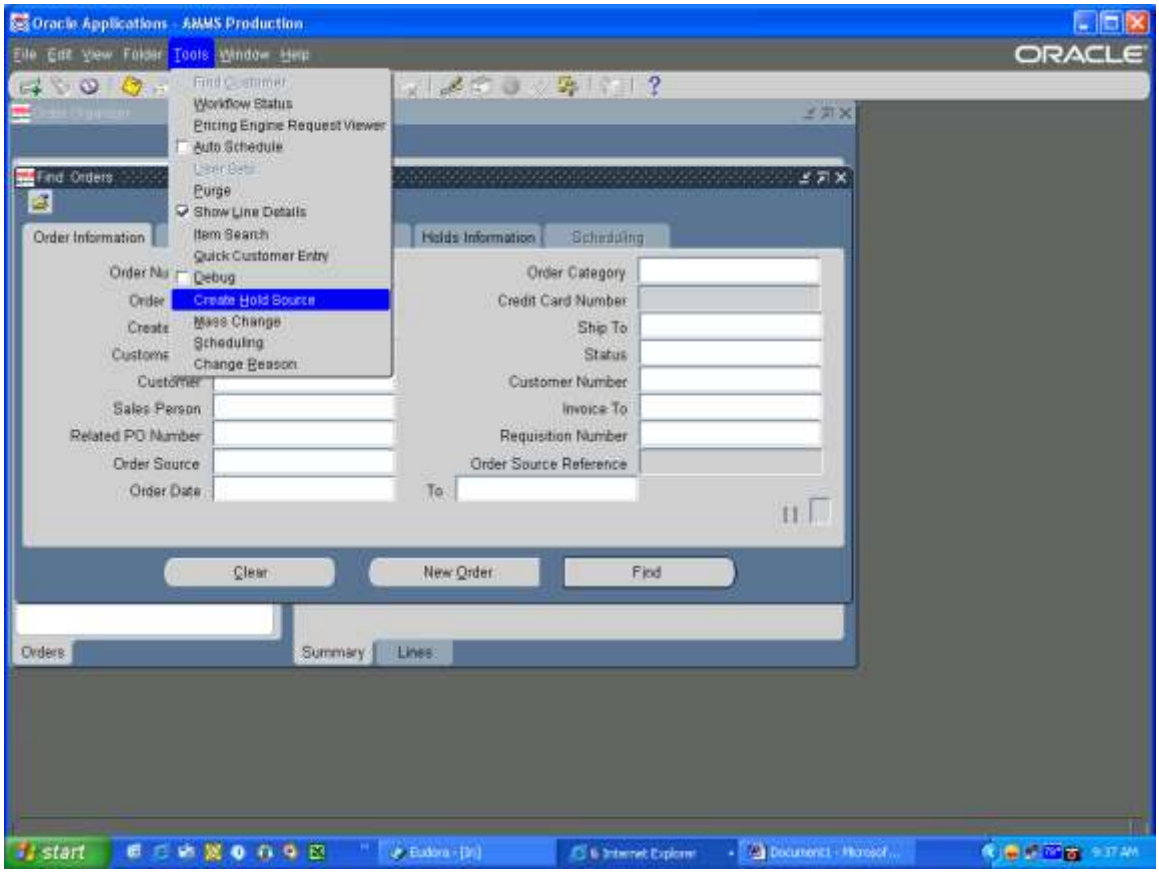
The purpose of this training script is to show how to process an approval hold on a specific line item.

Audience

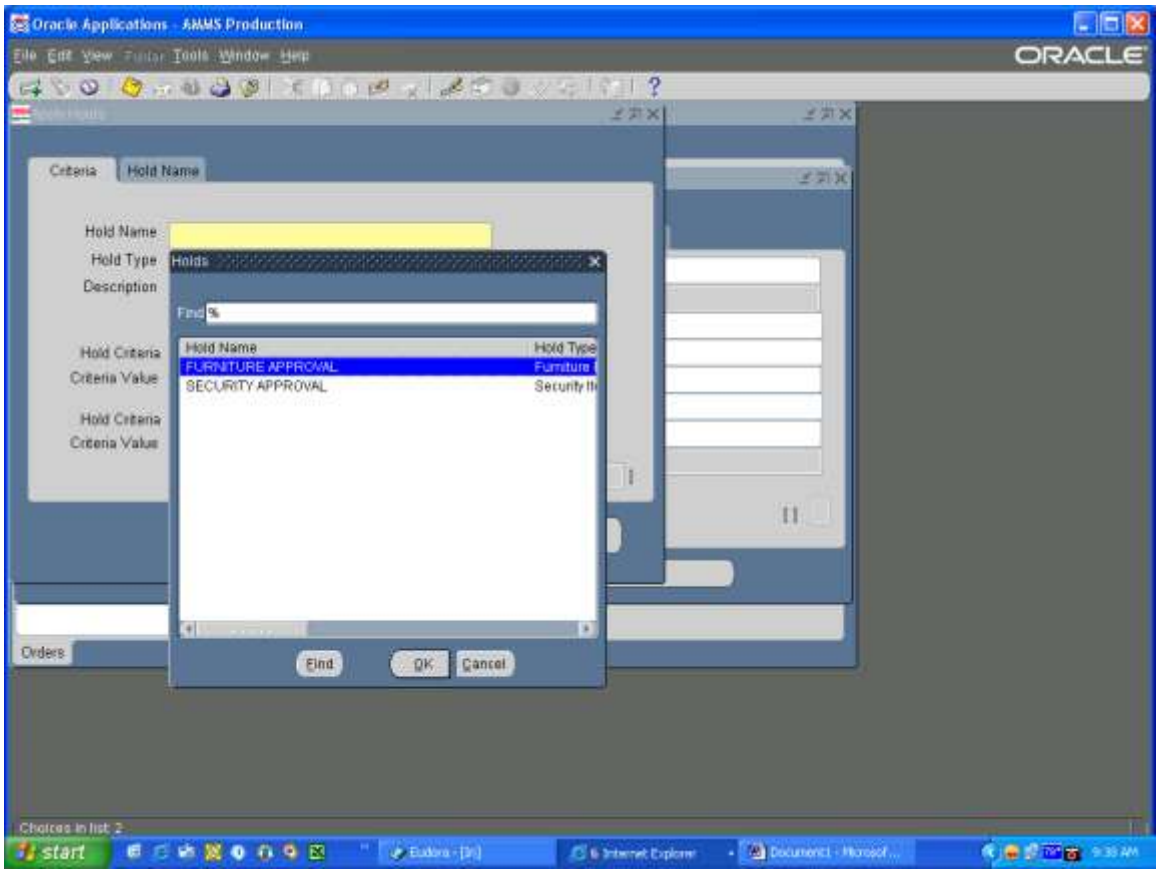
Material Coordinator and Supply Technician Leads

Prepared By	Theresa Coulson
Creation Date:	04/18/2006
Document Name	Approval Holds on Items.doc
Version	2
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Order Management.	

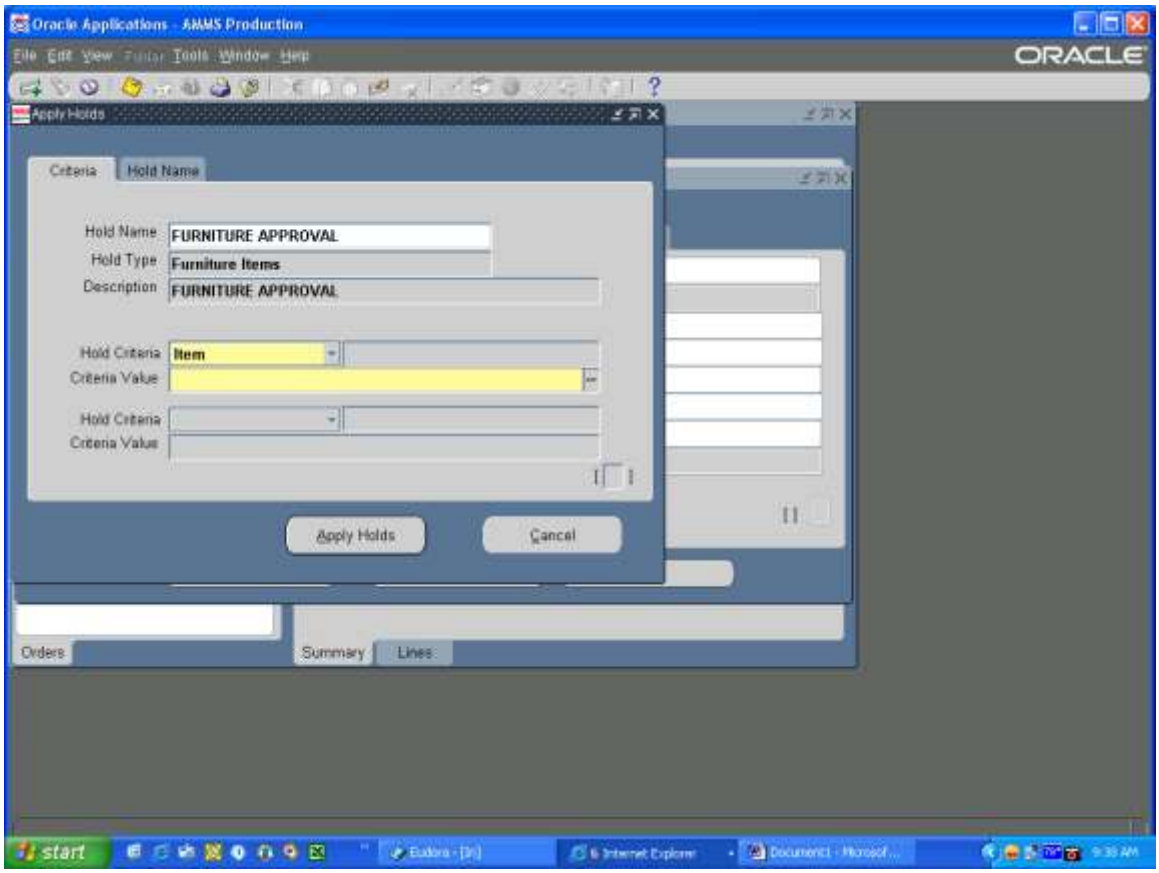
This process is for Approval Hold on specific item number. Currently in AMMS there are 2 Approval Hold Types, Furniture Approval, and Security Approval. To add items to one of these hold types go to your Order Management Responsibility, go to the Order Organizer screen, with a blank screen, from the toolbar select Tools, Create Hold Source.



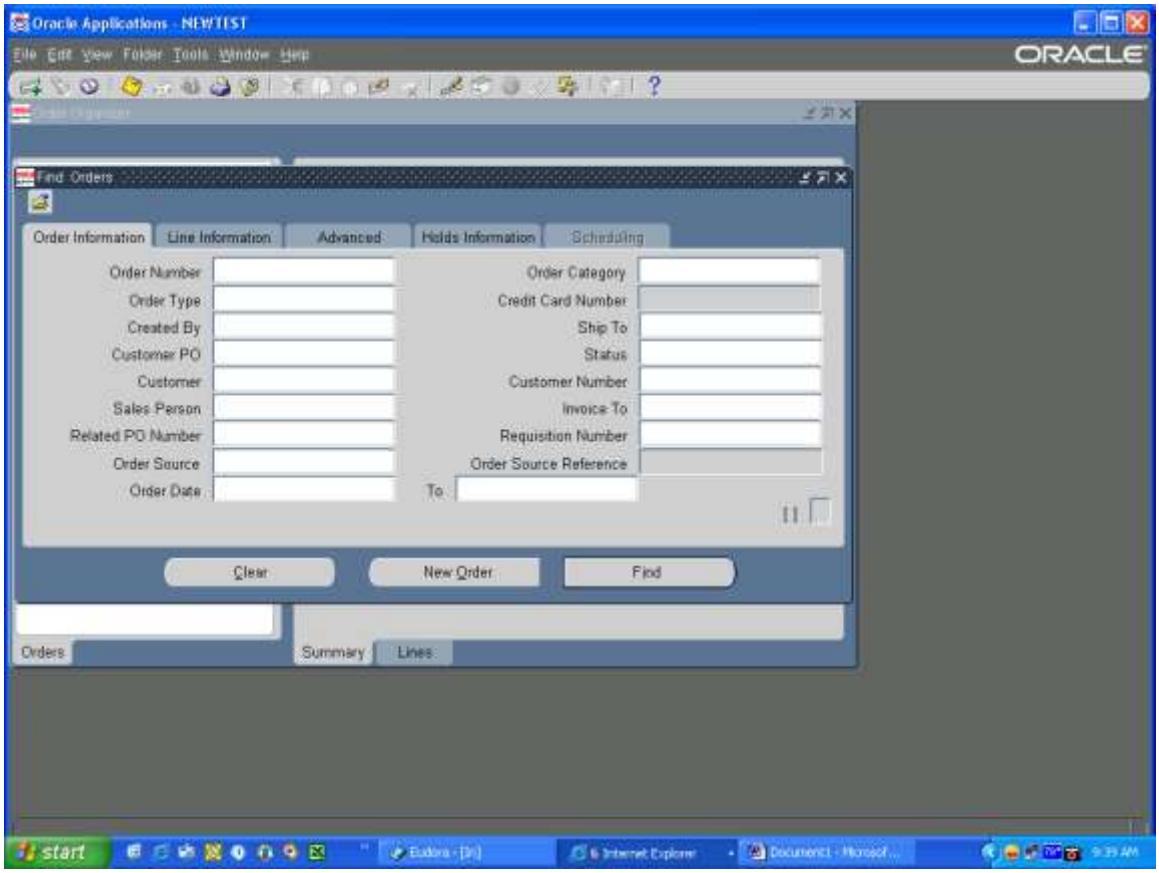
In the Hold Name field, click on the List of Values (LOV) and select the hold type that you are adding item to.



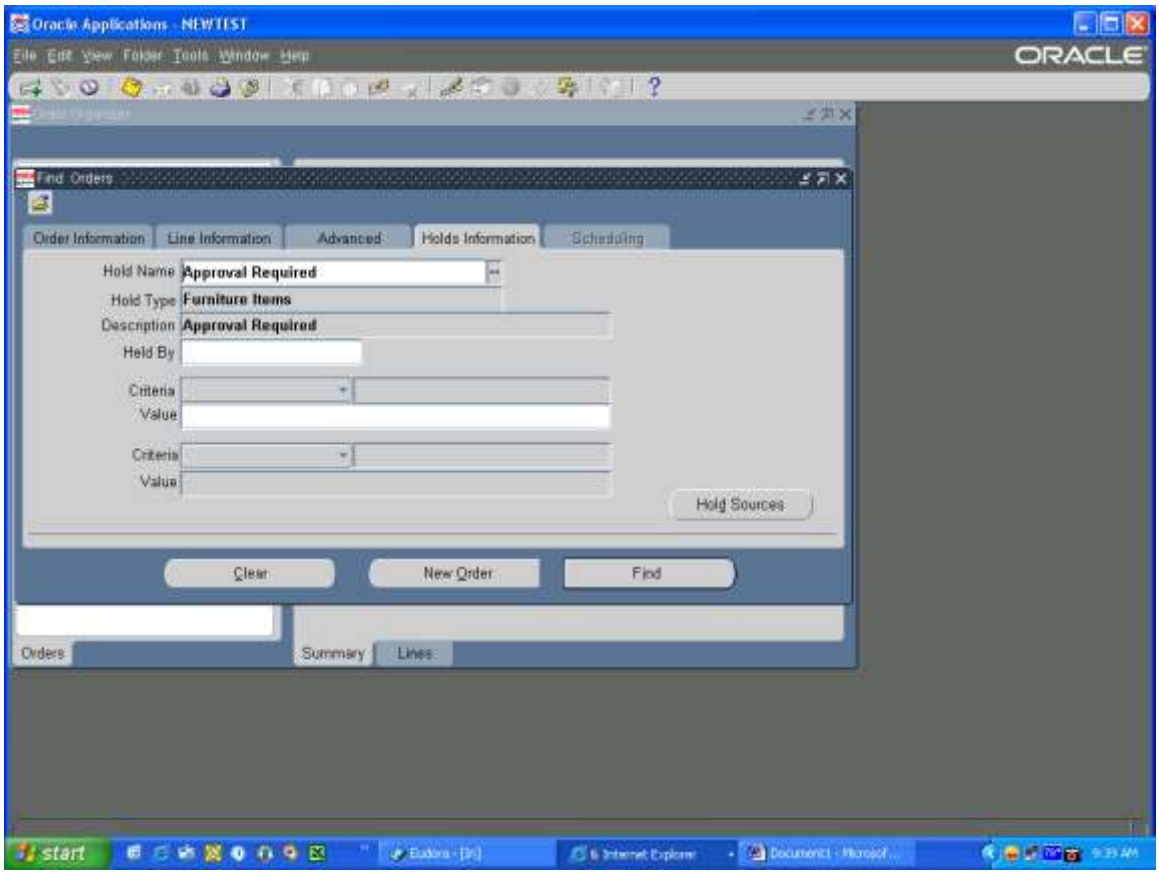
In the first Hold Criteria field , select Item from the drop down menu, then in the Criteria Value, enter the item number that you want the hold applied to. Click on the Apply Holds button and this item has been applied for that hold.



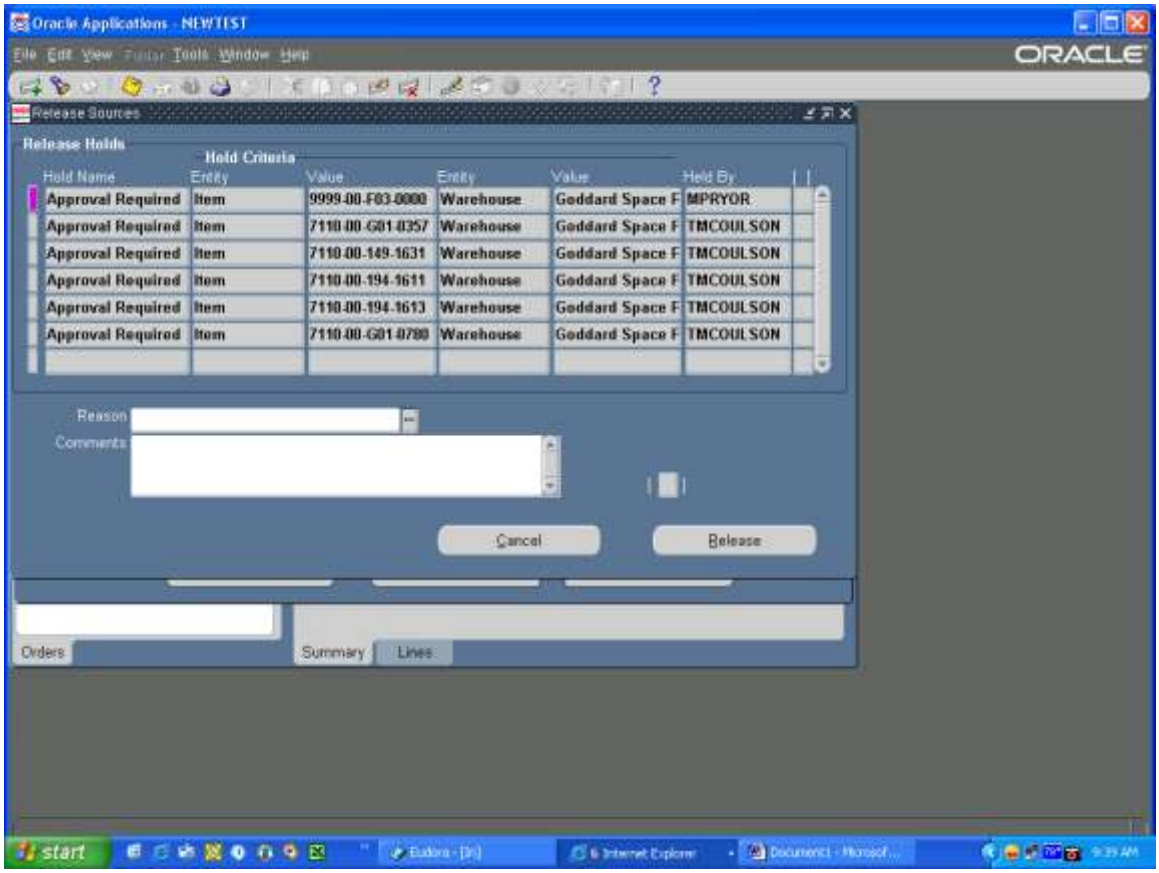
To see what items are assigned to the Hold Type, go to your Order Organizer screen, go to the Hold Information Tab.



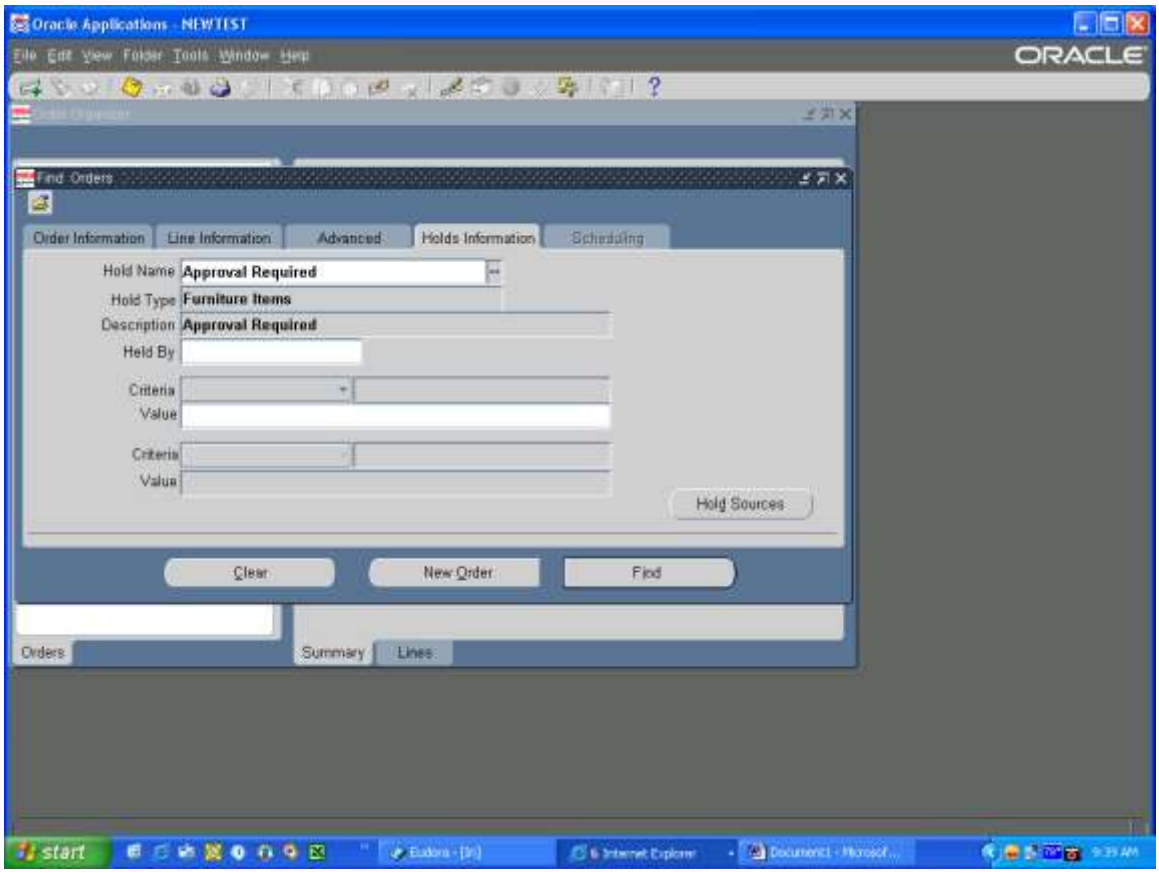
In the Hold Name field enter the name of the Hold that you want to see. Then click on the Hold Sources button, this will show all items that are assigned to this hold.



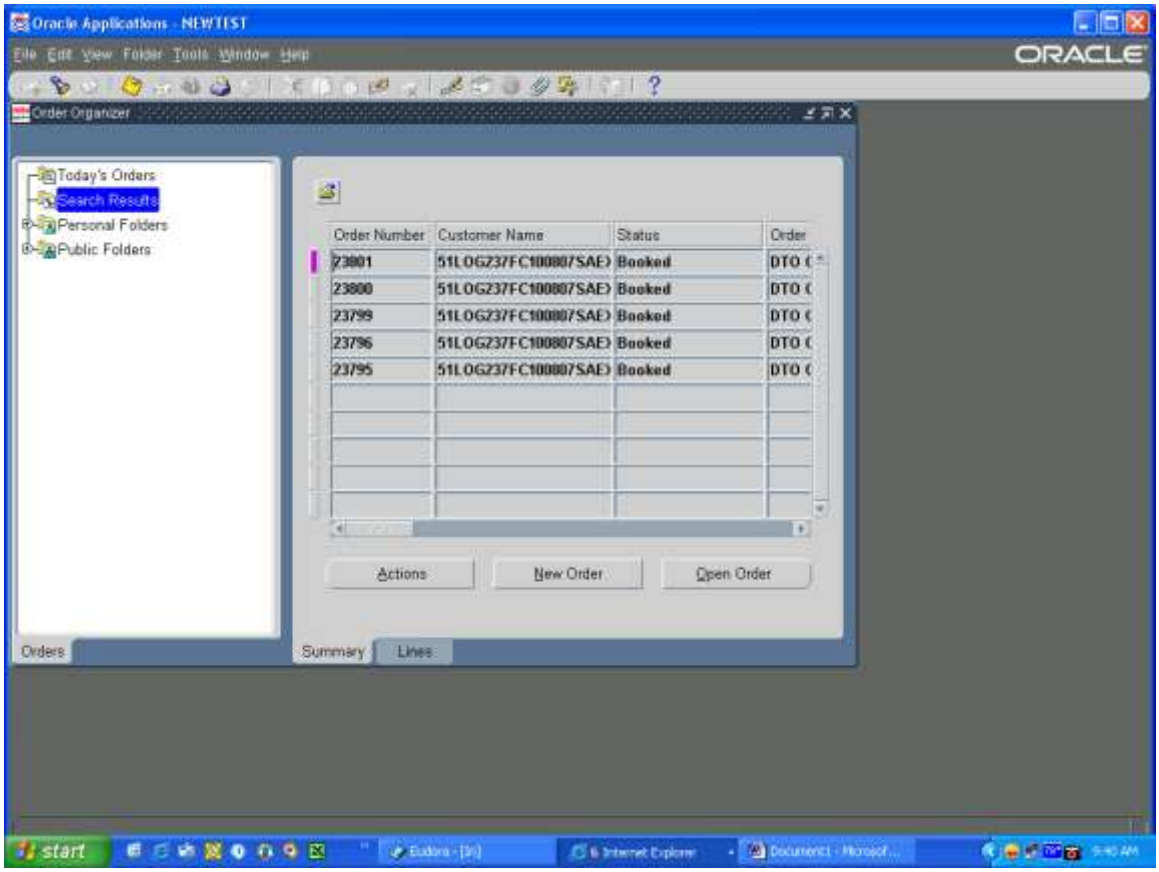
This is the screen with all of the items that are on hold. From this screen you can also, release a hold on an item number, make sure you are on the line with the item you want to release, then click on the Release button, you will have to select a reason for the release, and you can also put in comments. You will get a message that tells you the update was successful.



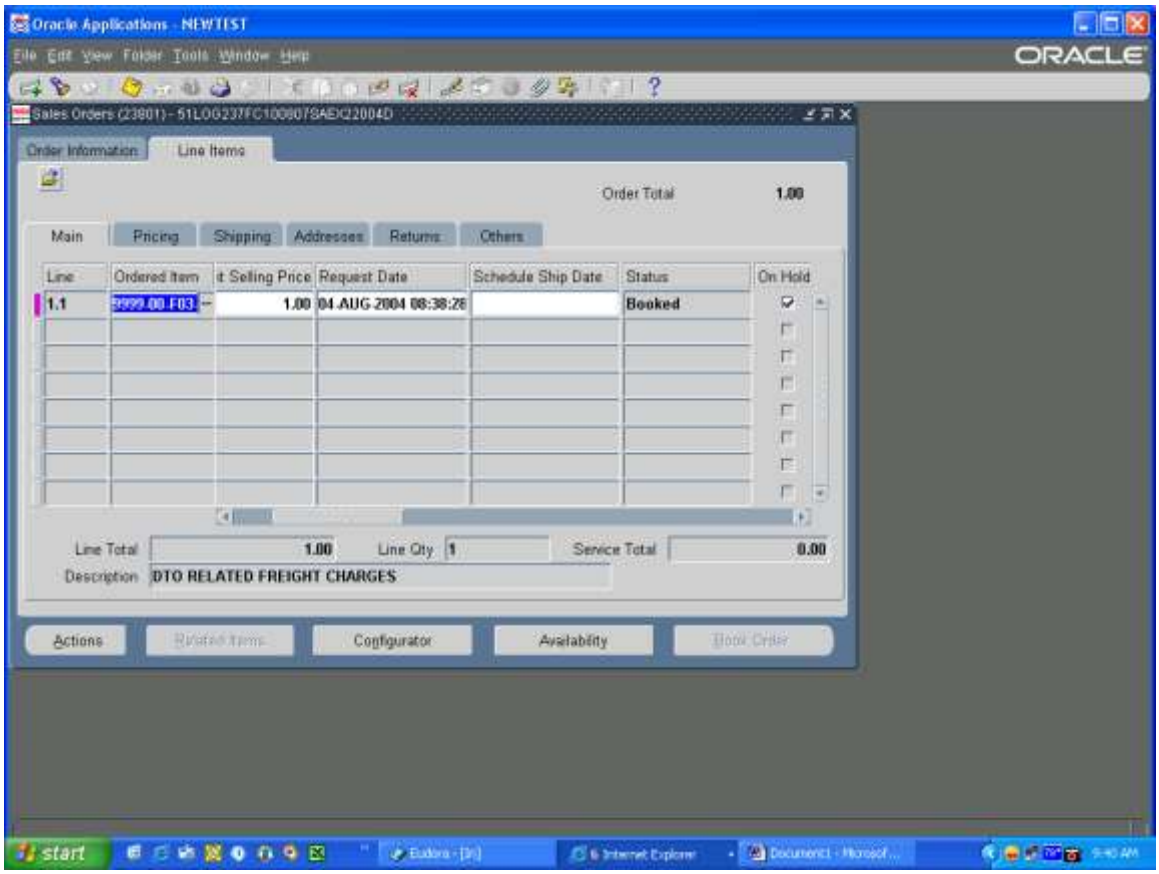
To be able to see all the sales order that are on hold. Go to your Order Organizer screen, go to the Hold Information Tab, in the Hold Name select your hold type, then click on the Find button, this will find any sales order for any items that are on hold for your hold type.



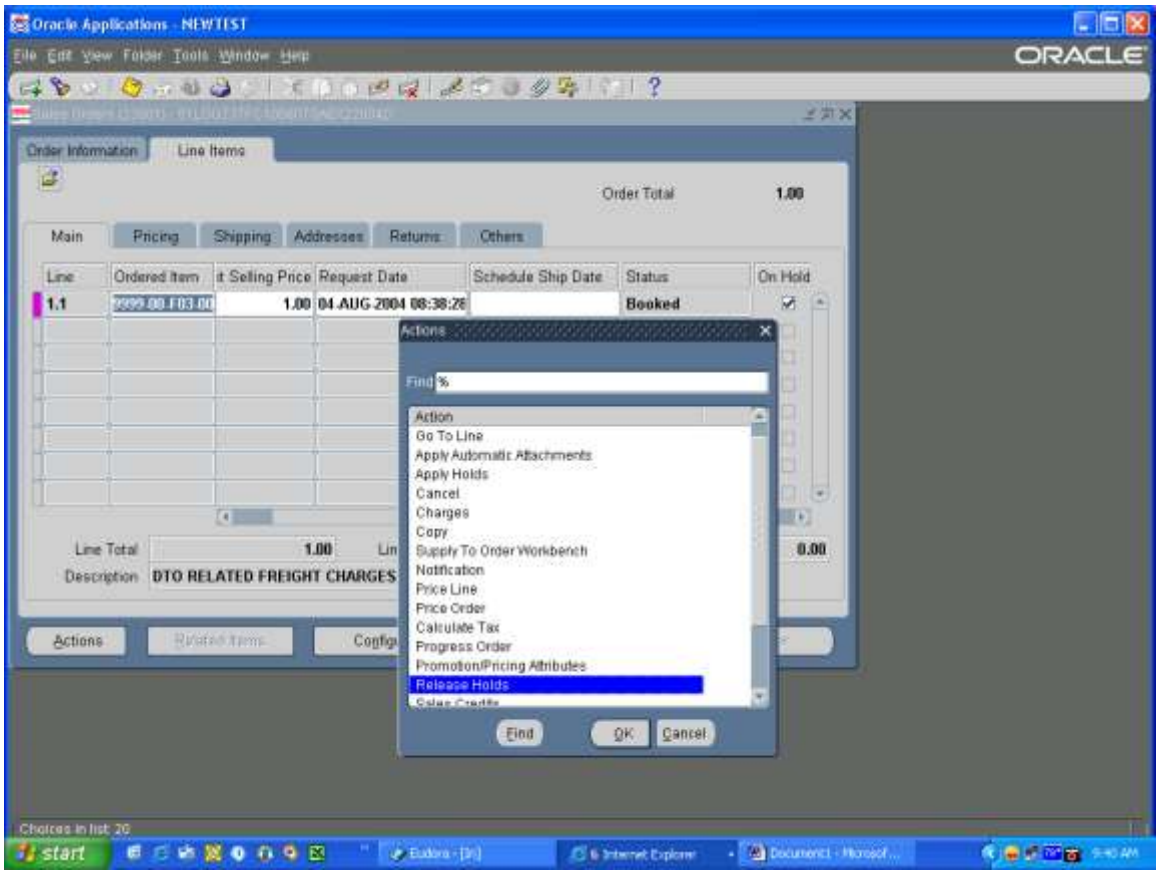
To be able to release a particular sales order from a hold, open the sales order, click on the Line Item tab



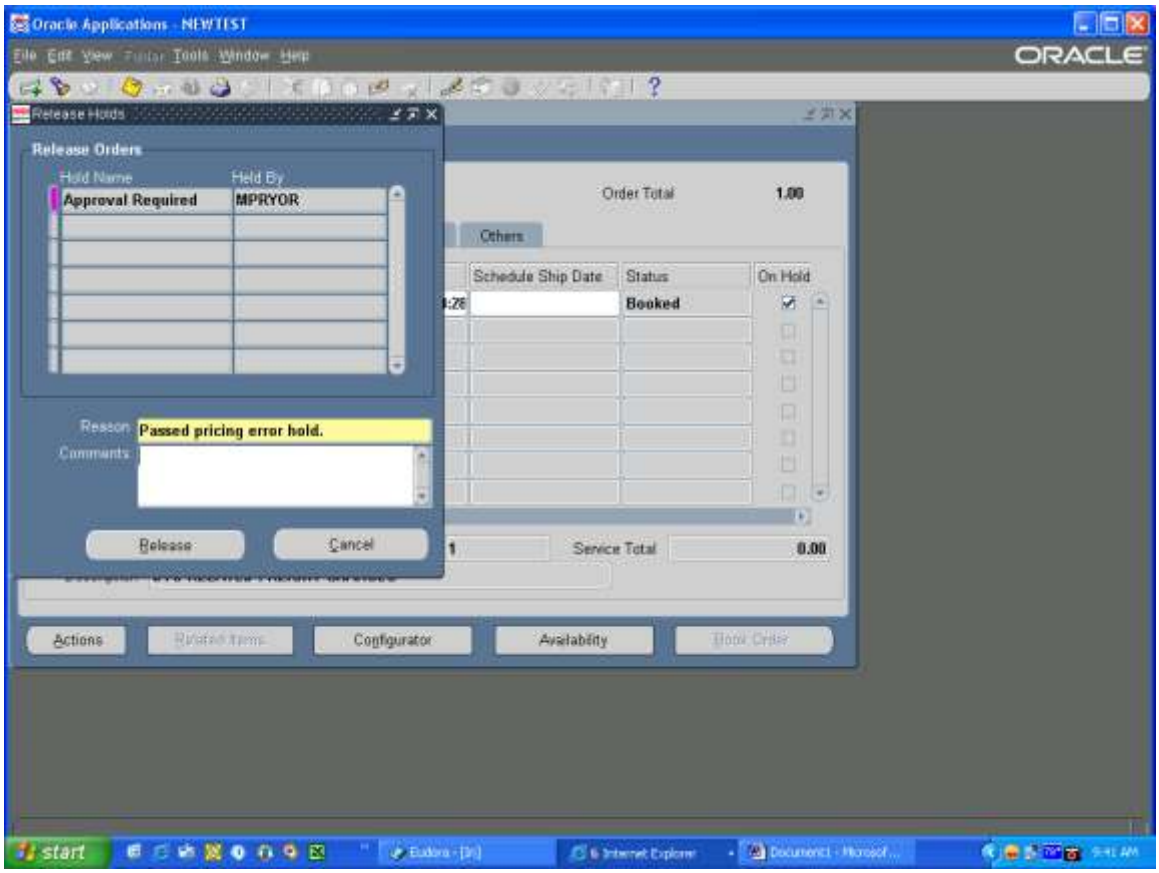
The status for all items on hold will be Booked. You can see the item is on hold, just past the status field in the line is a check mark in the On Hold.



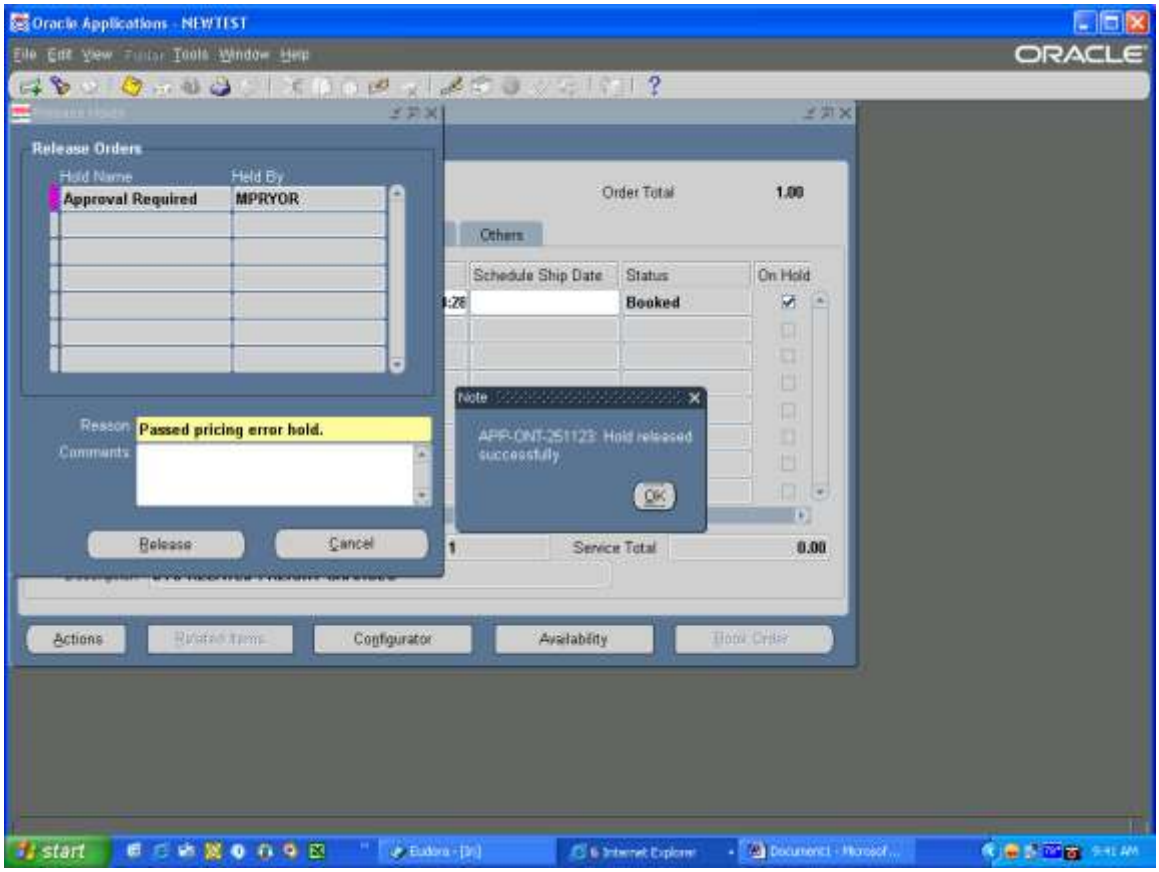
To remove a sales order from hold, select the line that you want removed, click on the Actions button, select Release Hold, click OK



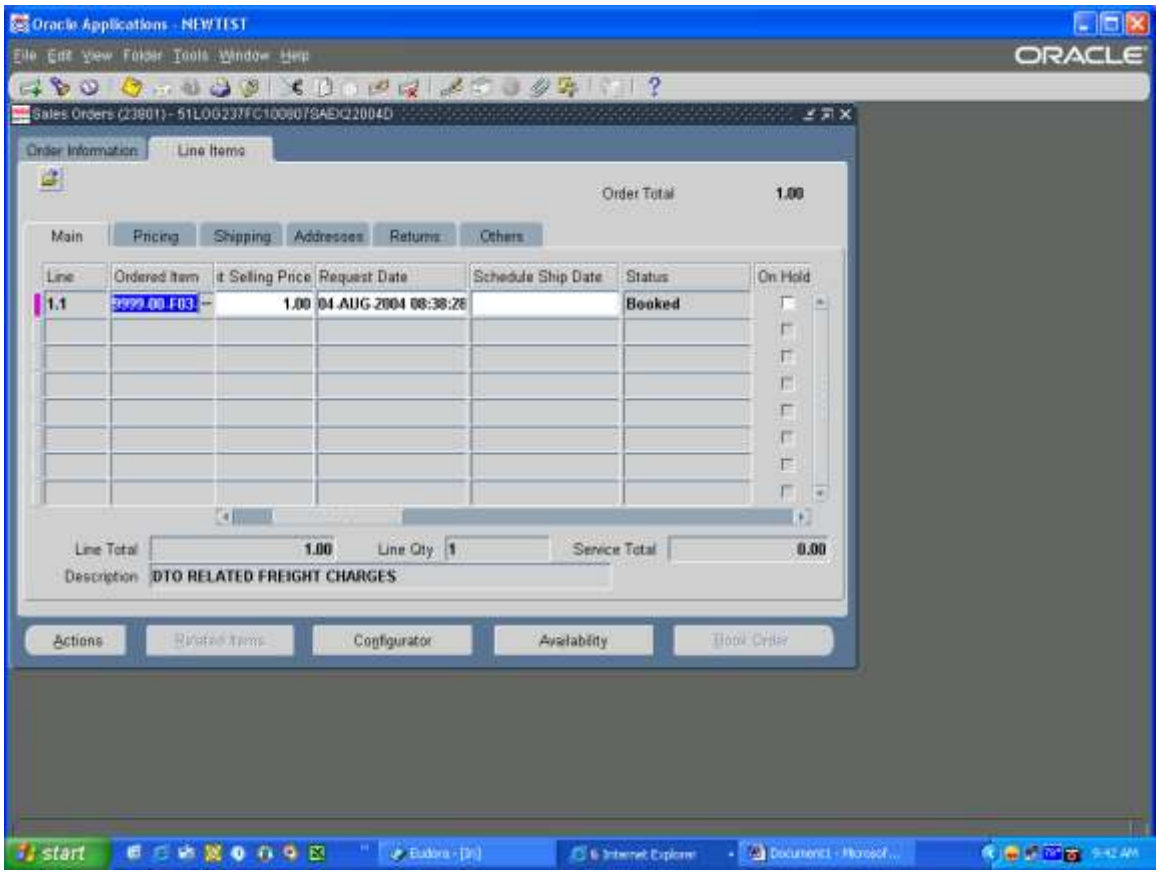
Another screen will appear, you need to enter the reason for the removal of the hold, then click on the Release button.



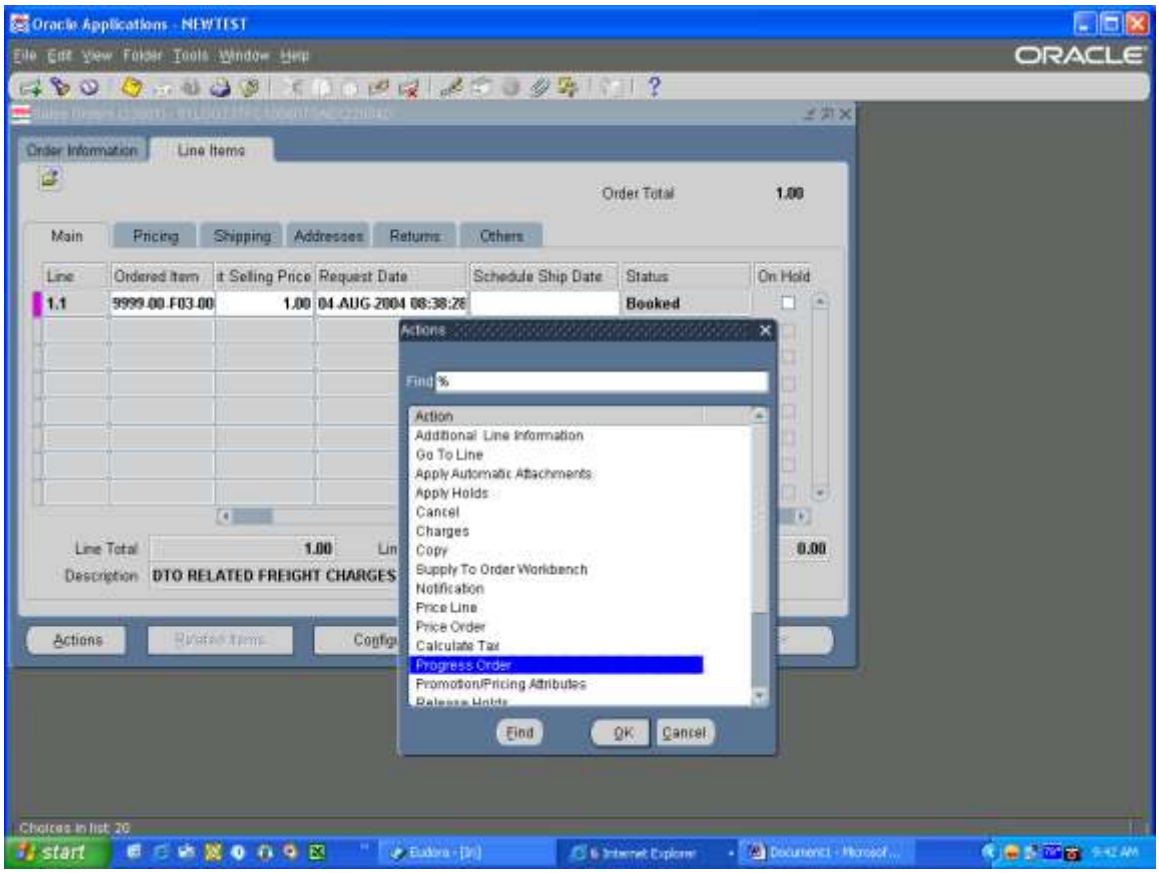
You will get a message saying the hold has been released.



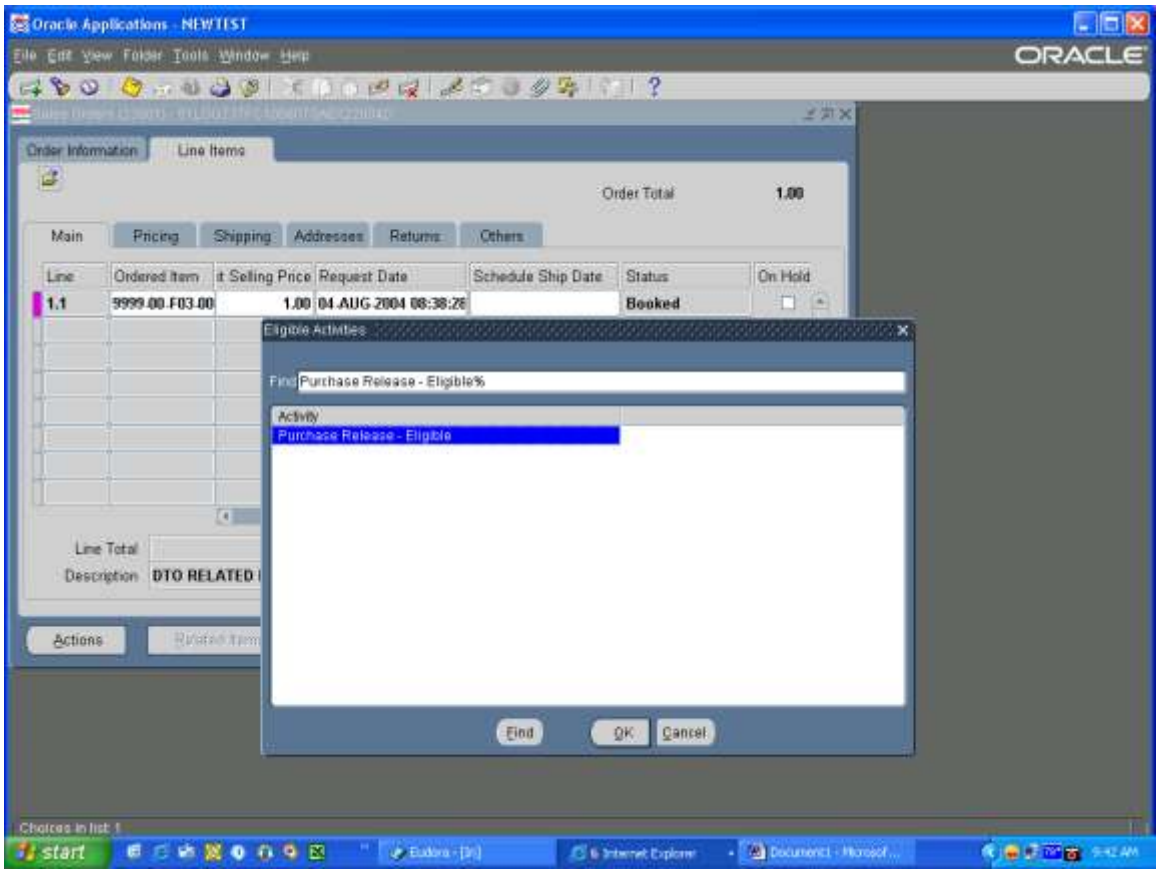
The status on the order still says Booked, you now need to send the sales order through Workflow.



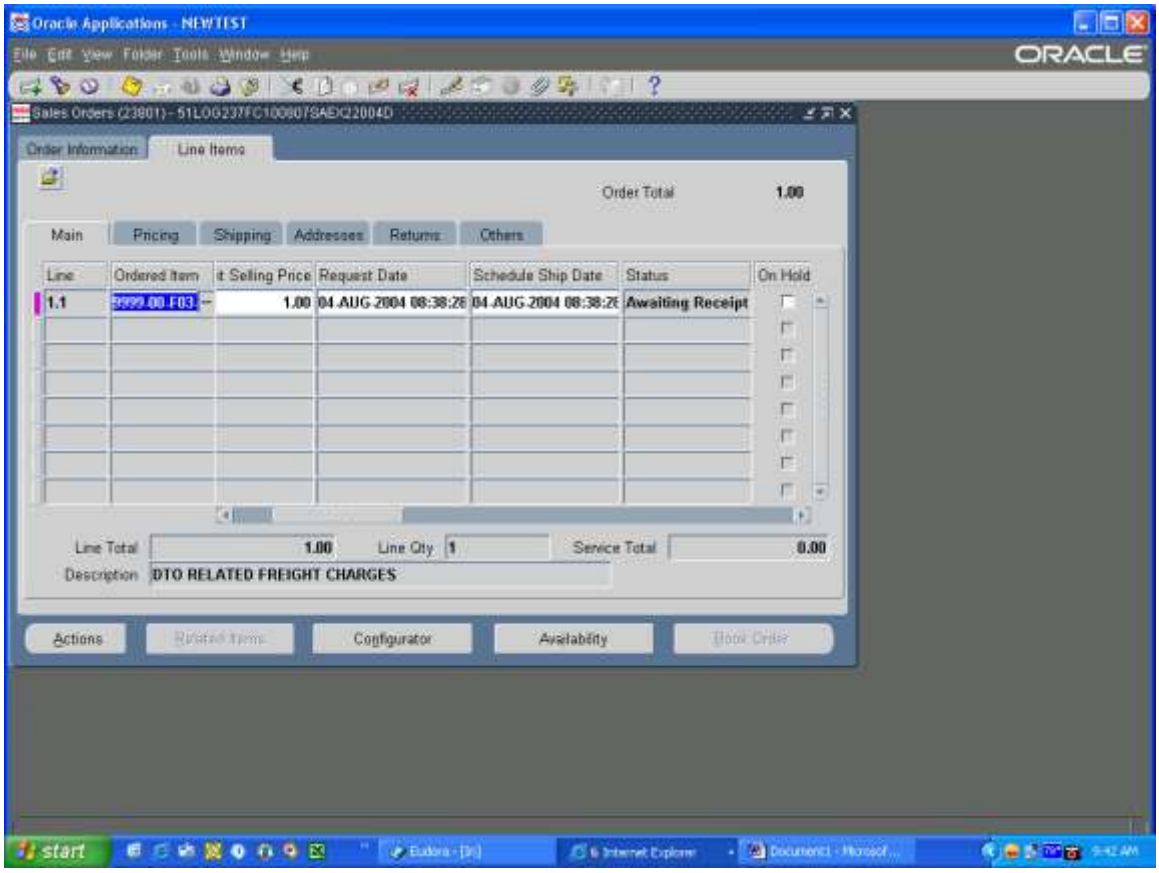
Click on the Actions Button, select Progress Order, click OK.



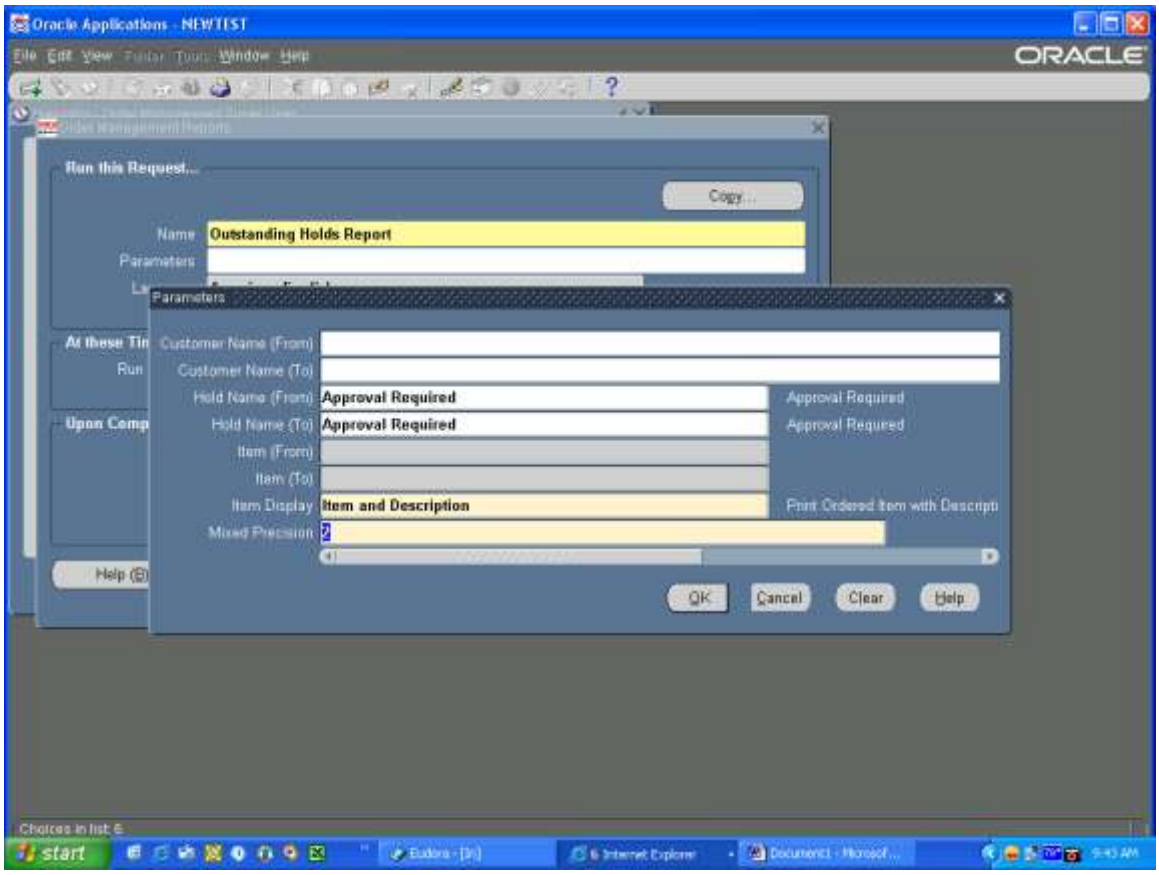
A window will pop up that tells you that your order is Purchase Release Eligible. Click OK. If you some reason you don't get this message, please let Theresa know, there could be a problem.



The status now on the order is Awaiting Receipt. Now the next time that Requisition Import run a purchasing requisition will generate to buy this material.



There is also a report that will be distributed daily with the Min Max, this will show every day any sales order that are on hold. To run this report, in your Order Management responsibility select Reports, Run Reports, the name of the report is Outstanding Hold Report. In the parameters window enter your Hold Type in the Hold name field, and in the Item display field click on the LOV and select Item and Description. This will show all sales order that are on hold.



AMMS TRAINING SCRIPT

Cancel Sales Order Line

Purpose

The purpose of this training script is to give instructions on how to cancel a sales order line, and check to make sure there is not an open Purchase Order, or Purchase Requisitions for the sales order line.

Audience

Material Coordinators and Supply Team Lead

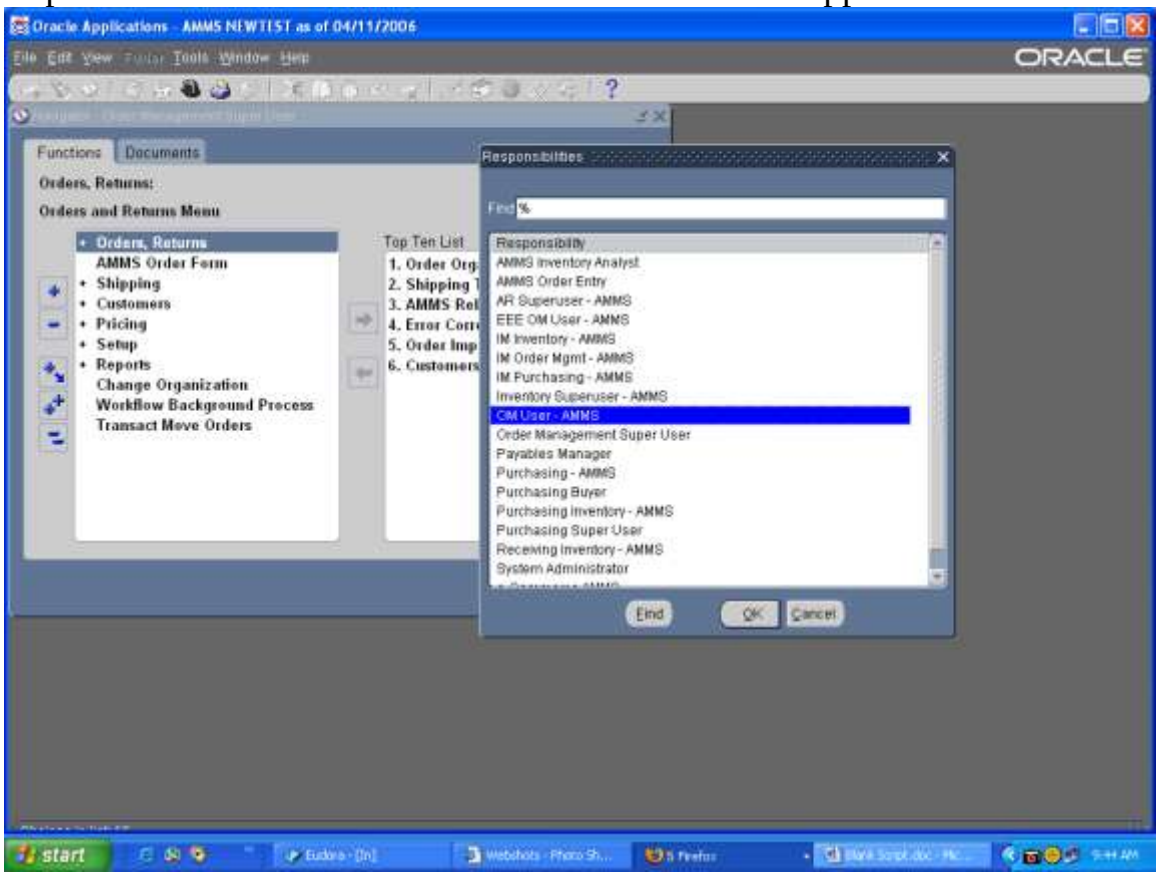
Prepared By	Theresa Coulson
Creation Date:	04/25/2006
Document Name	Cancel Sales Order Line.doc
Version	2
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Order Management.	

AMMS Training Script: This will give instructions on how to cancel a sales order line, and check to make sure there is not an open Purchase Order, or Purchase Requisitions for the sales order line.

<u>Note: If you are cancelling a Sales Order and the Line Type is DTO but Requisitions have not yet generated, even if you cancel the sales order Oracle will still generate purchase requisitions for the lines cancelled. Be sure to also go back and cancel all purchase requisitions</u>

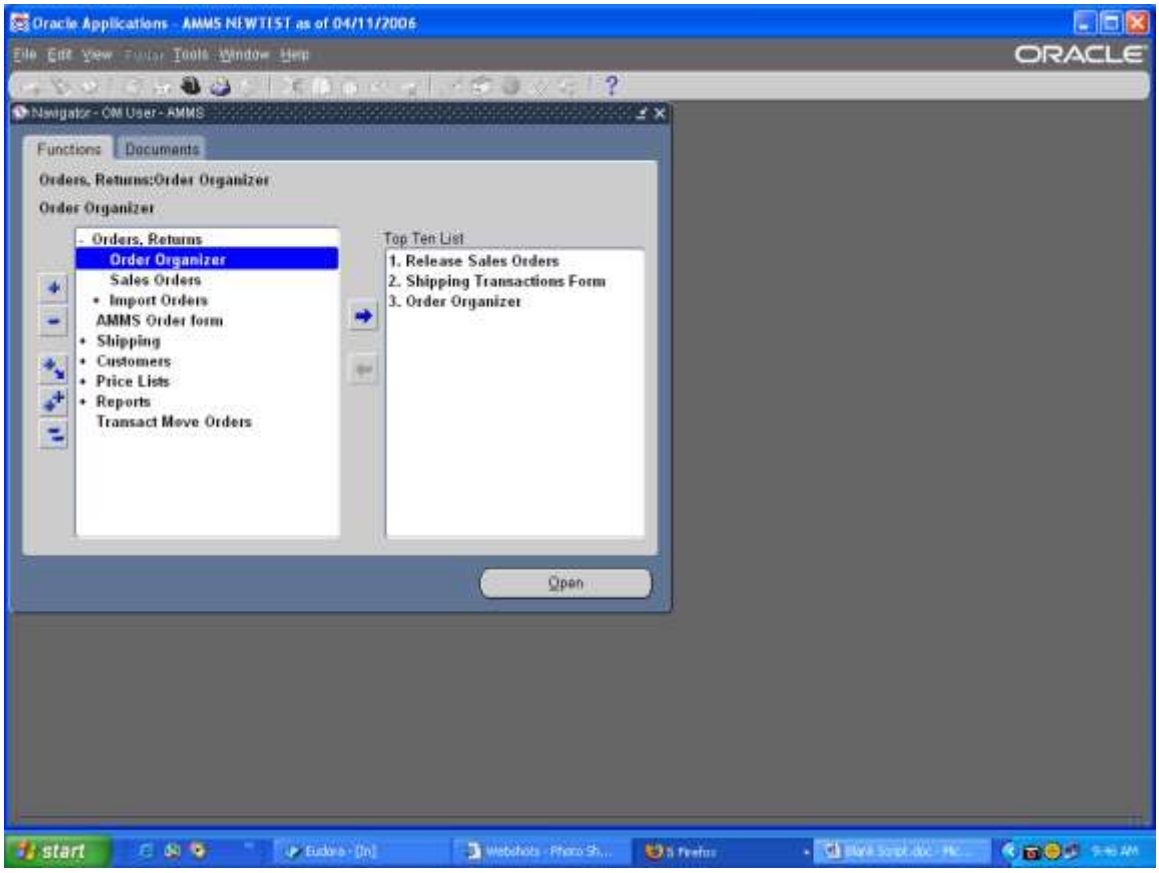
Step Description: Sign onto Oracle and select OM User AMMS responsibility

Expected Results: OM User AMMS main menu will appear



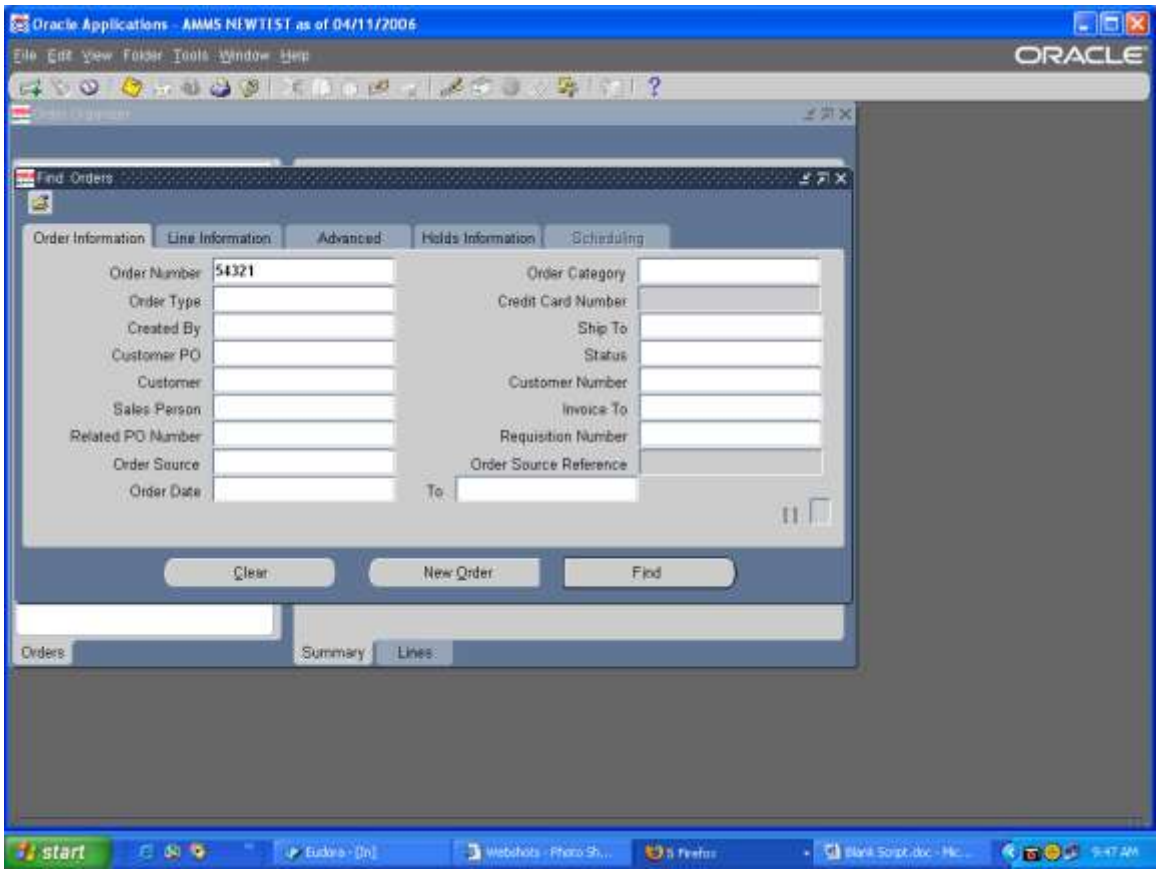
Step Description: From the OM User AMMS main menu select Orders, Return > Order Organizer, click on the Open button

Expected Results: Find Orders window will appear



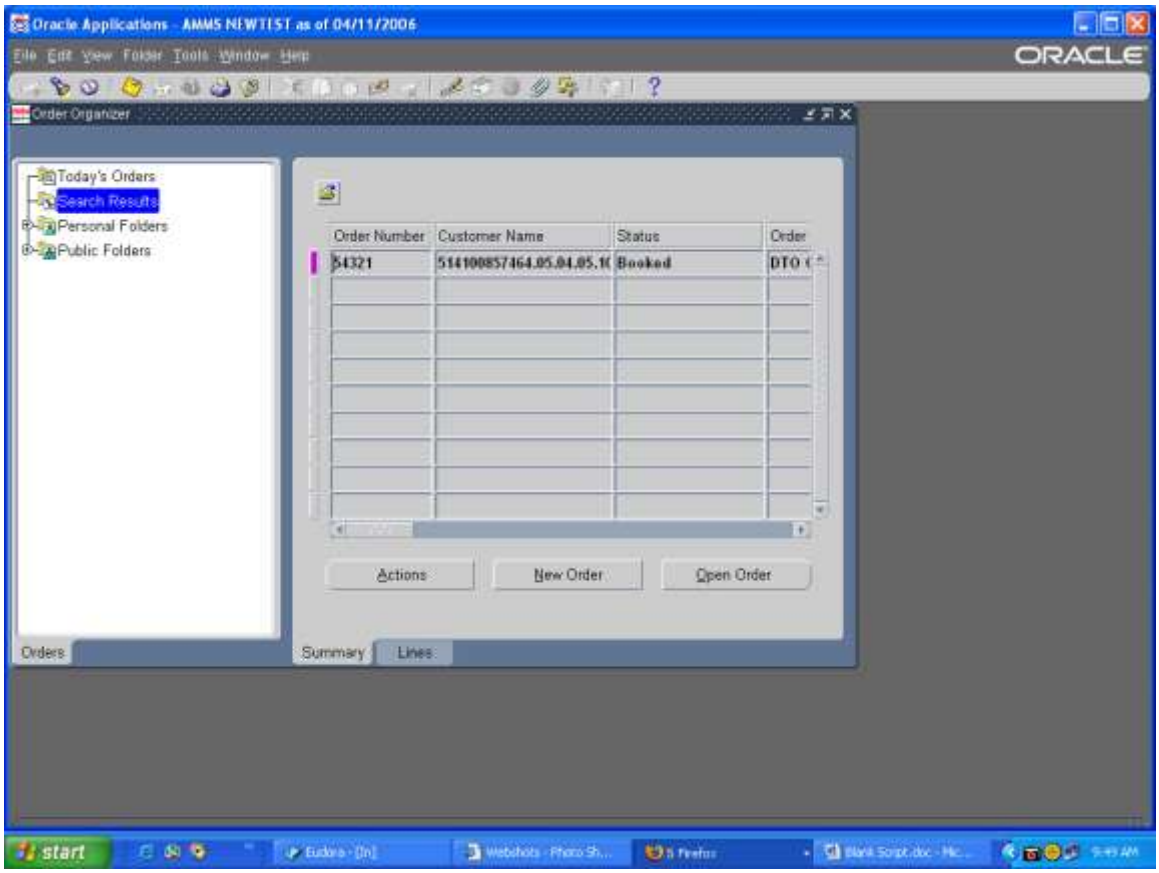
Step Description: In the Order Number field enter the sales order number that you want to cancel a line on, click on the Find button

Expected Results: Field will be populated and Order Organizer window will appear



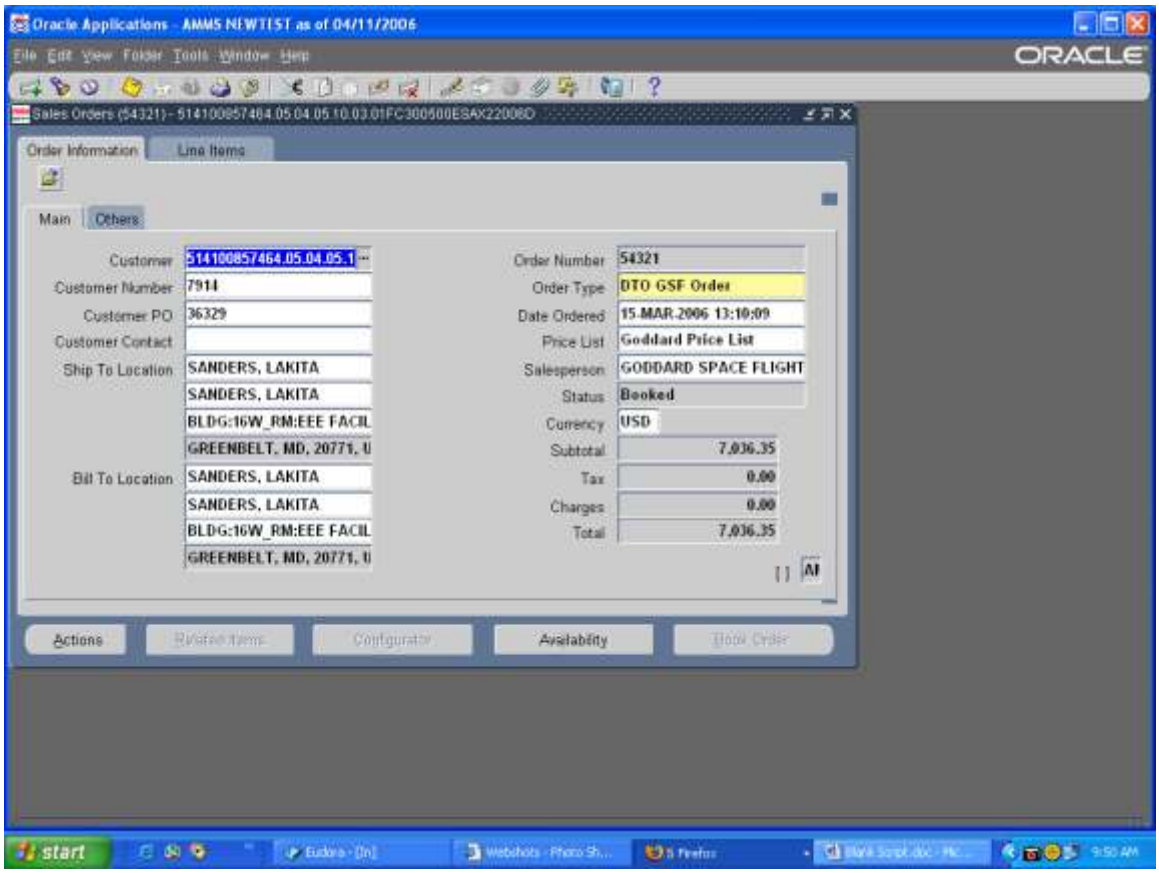
Step Description: Click on the Open Order button

Expected Results: Sales Order window will appear



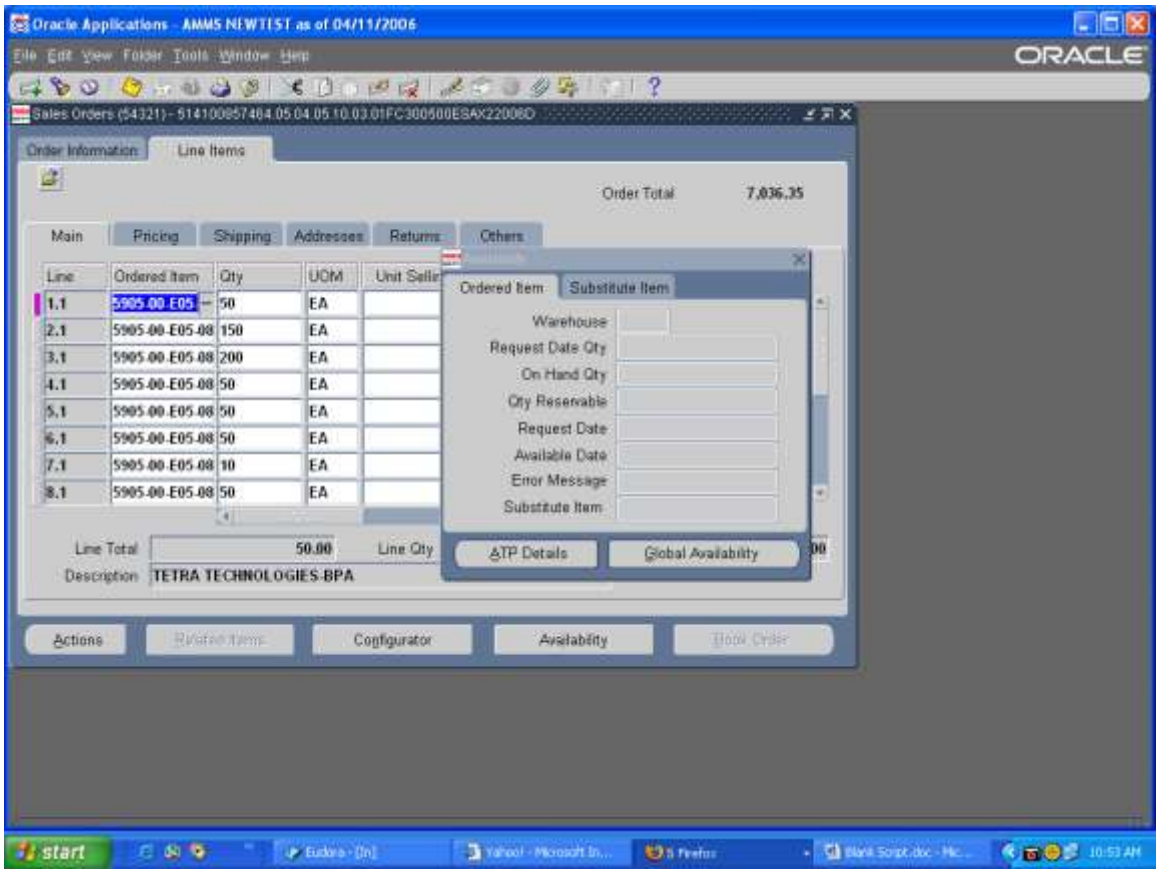
Step Description: Click on the Line Items tab

Expected Results: Window view will change to Line Item information



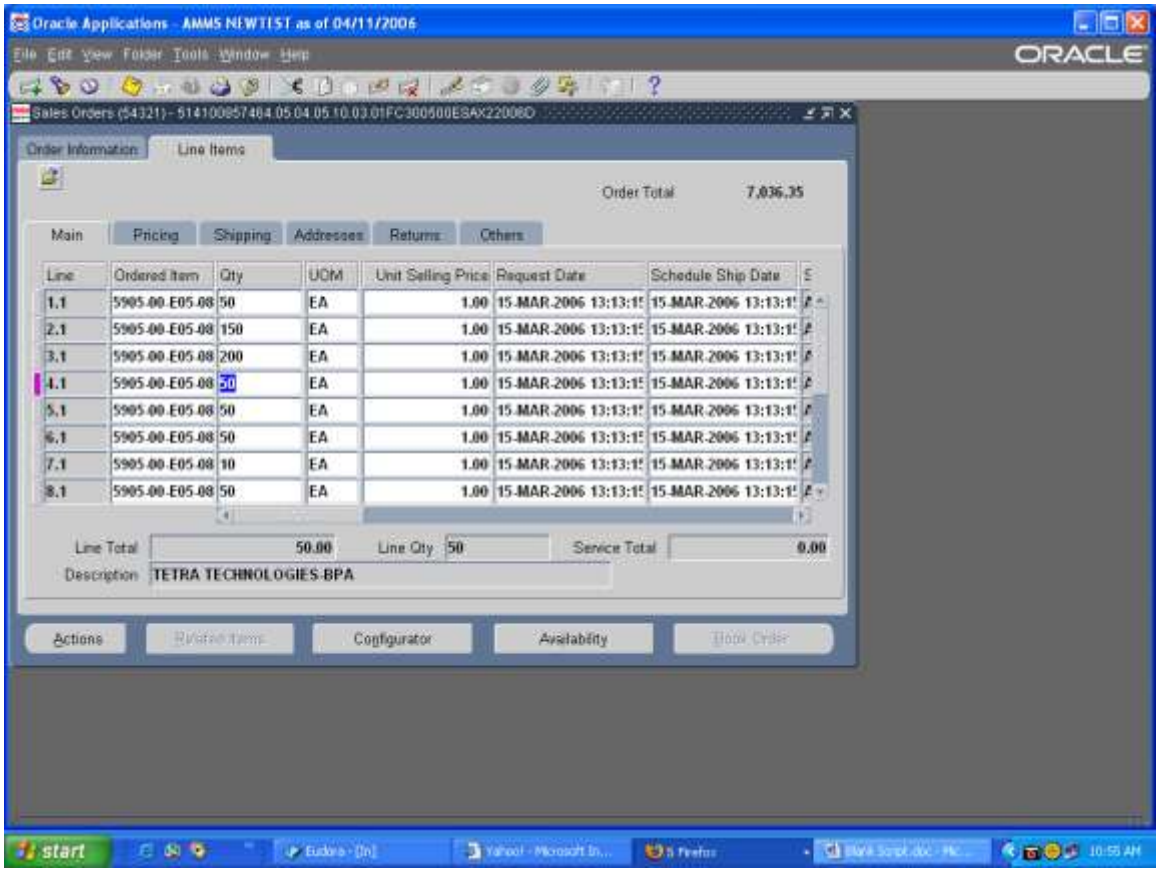
Step Description: Close the Availability window

Expected Results: Window will go away



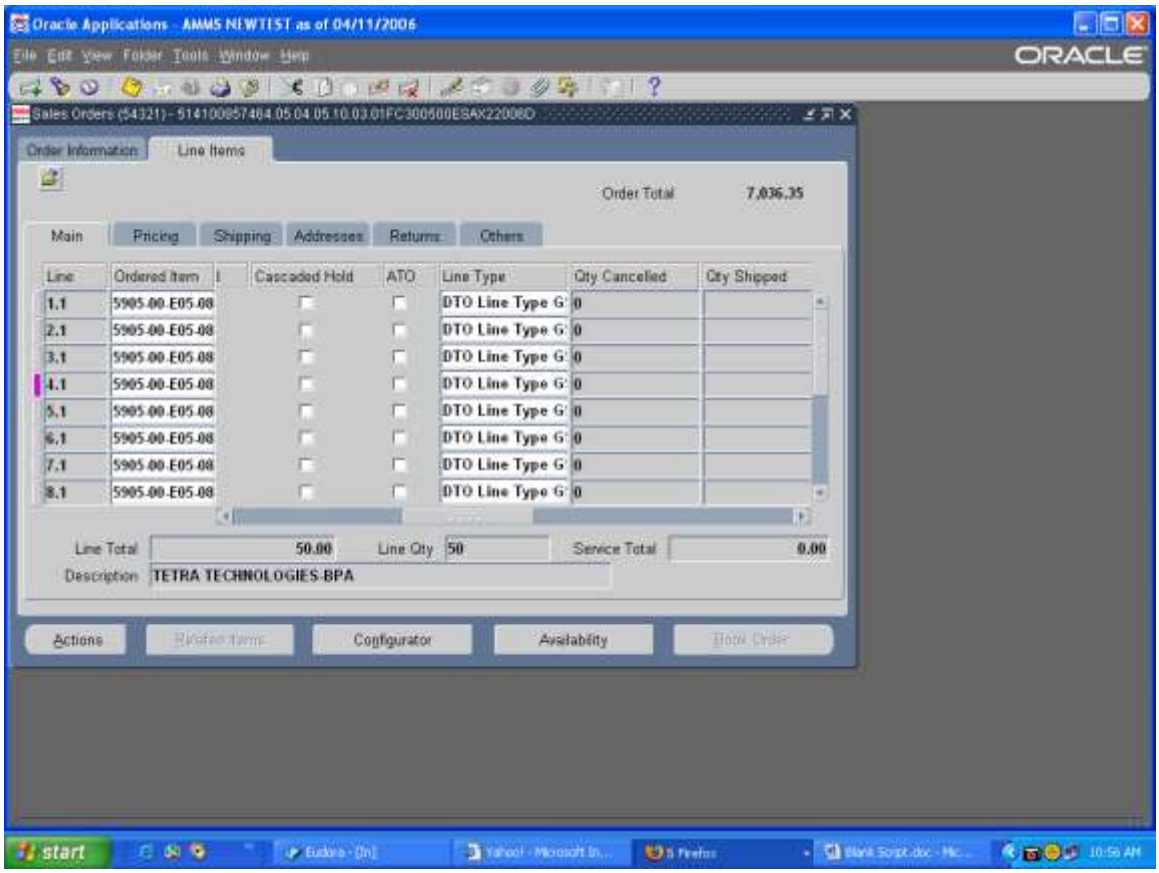
Step Description: Select the line that you want to cancel by clicking on the line and the purple line indicator will be next to the line selected

Expected Results: Line will be selected



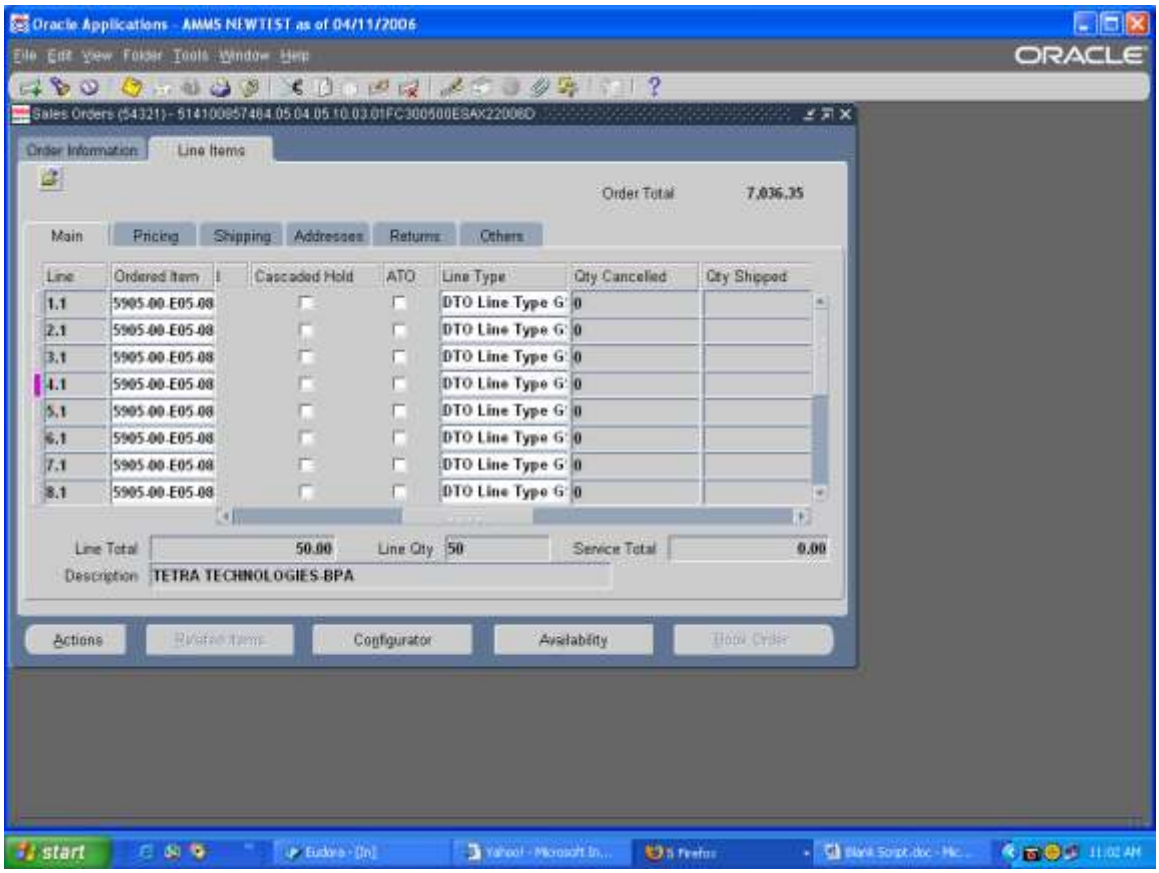
Step Description: Use the scroll bar at the bottom of the window, move to the right and look at the Line Type field

Expected Results: Window view will change



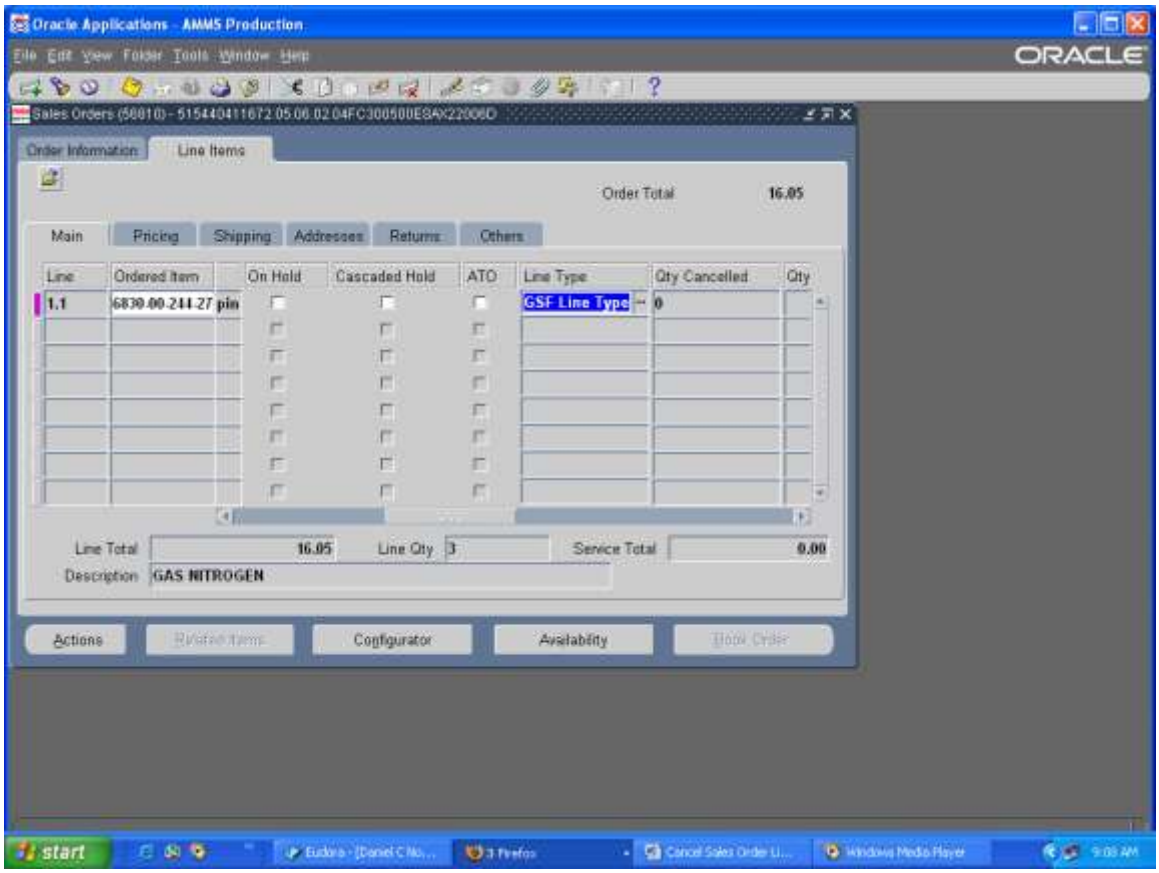
Step Description: If the Line Type is “DTO Line Type GSF” or “DTO Line Type WFF’ **STOP!!**

When you want to cancel a sales order line that has a Line Type of DTO you MUST first check to make sure there is not an existing Purchase Order or Purchase Requisition associated with the sales order line.



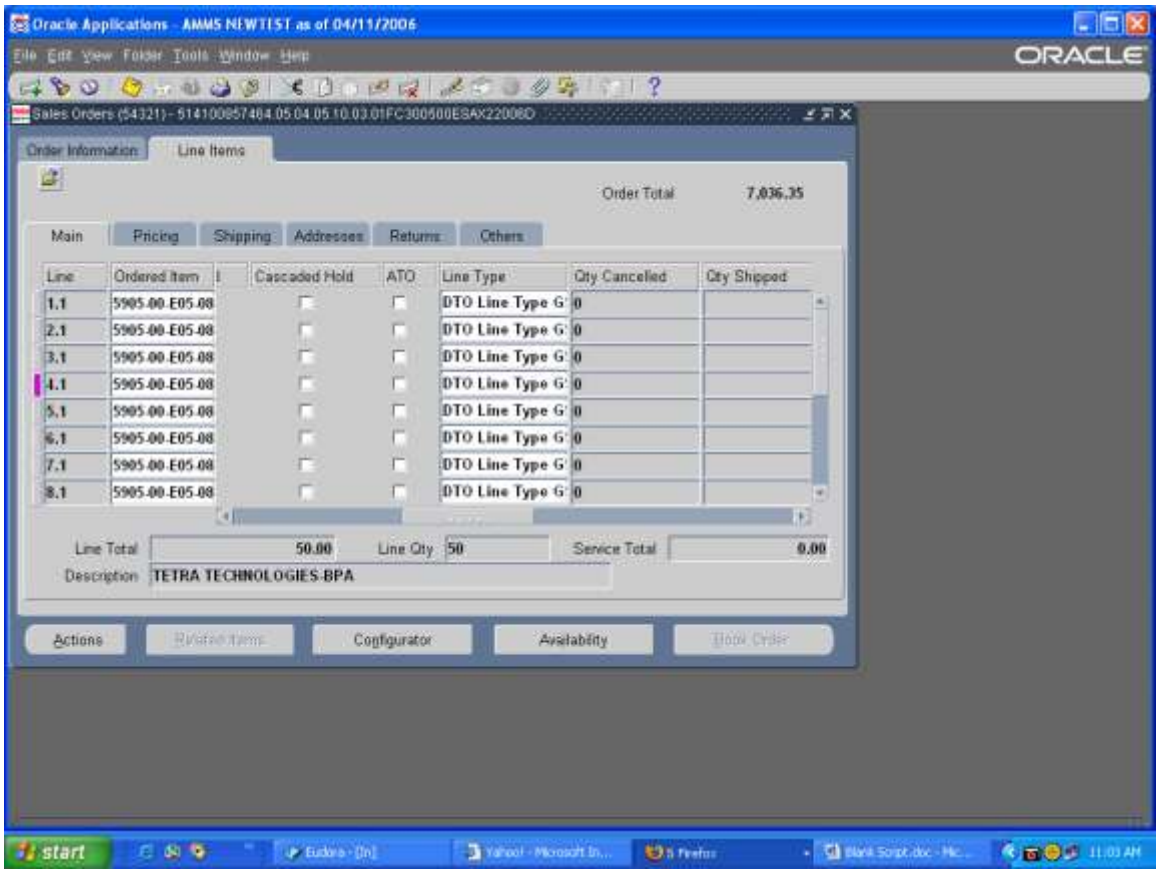
<u>NOTE: EVEN IF THE LINE TYPE IS NOT DTO, IT IS POSSIBLE THAT ORACEL HAS GENERATED A REQUISITION TO BUY THIS MATERIAL. IF THE STATUS IS “PICKED” THERE IS AN EXSISTING OPEN PICK SLIP FOR THIS ITEM AND THE SALES ORDER LINE CAN NOT BE CANCELLED UNTIL THE PICK SLIP IS BACKORDERED.</u>

Step Description: For GSF Line Type, you will need to go to Purchasing Requisition Summary and match the data and quantity to cancel the requisition.



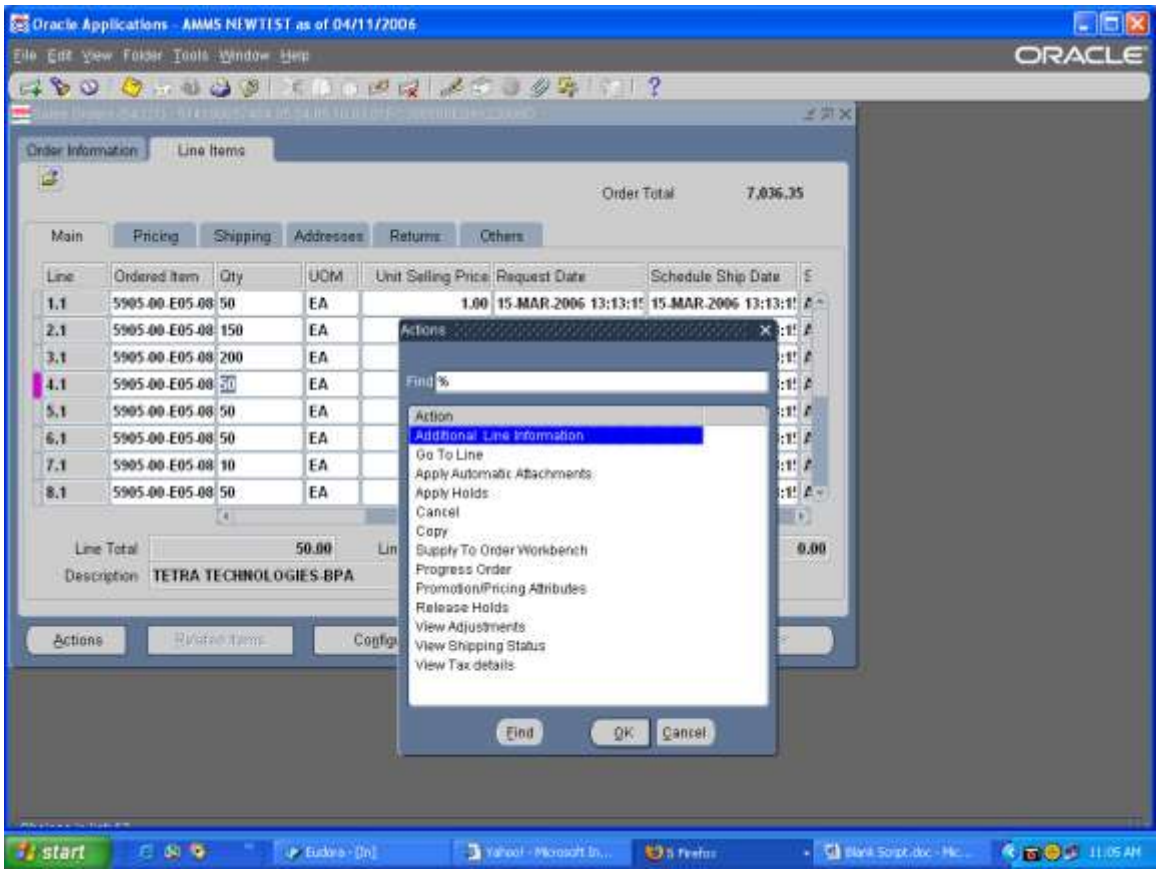
Step Description: <u>For DTO Line Type</u>: To check for an existing PO or Requisitions click on the Actions button at the bottom left of the window

Expected Results: Action window will appear



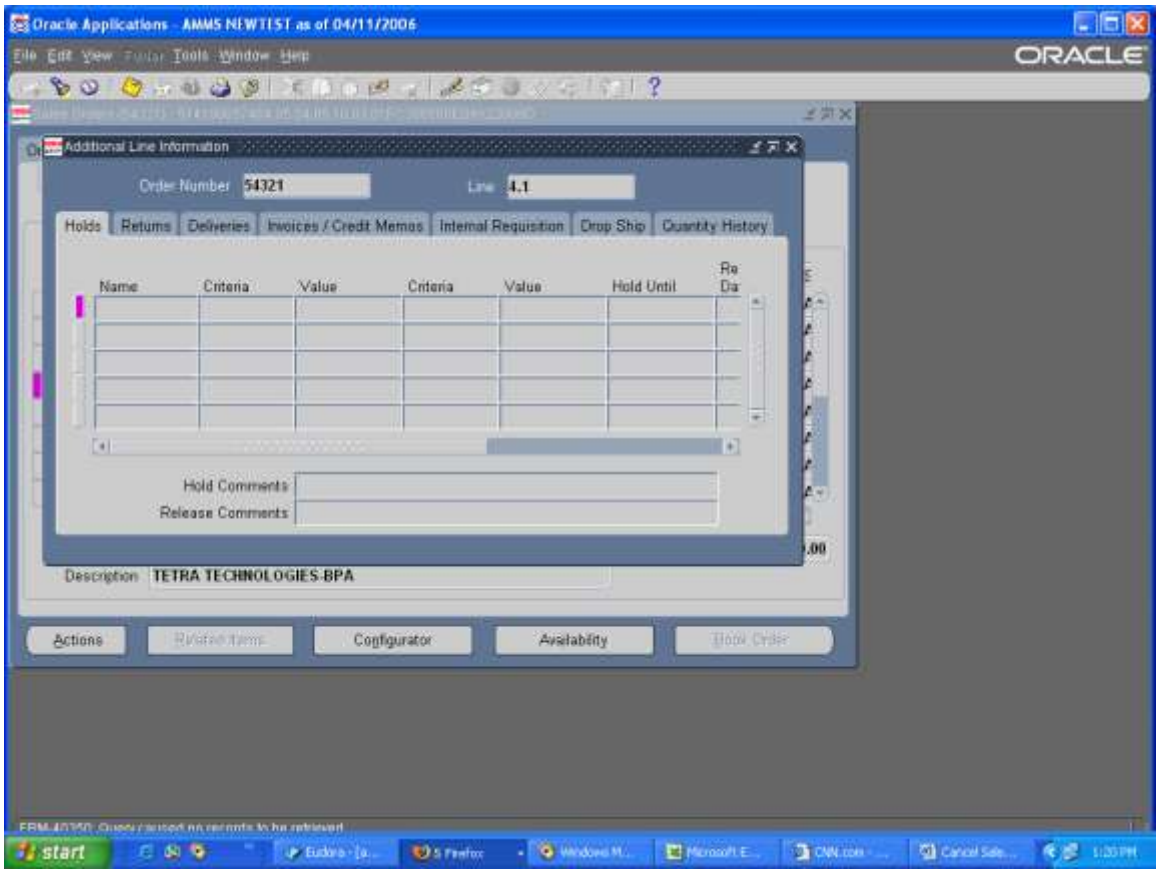
Step Description: From the Action window select Additional Line Information, click OK

Expected Results: Additional Line Information window will appear



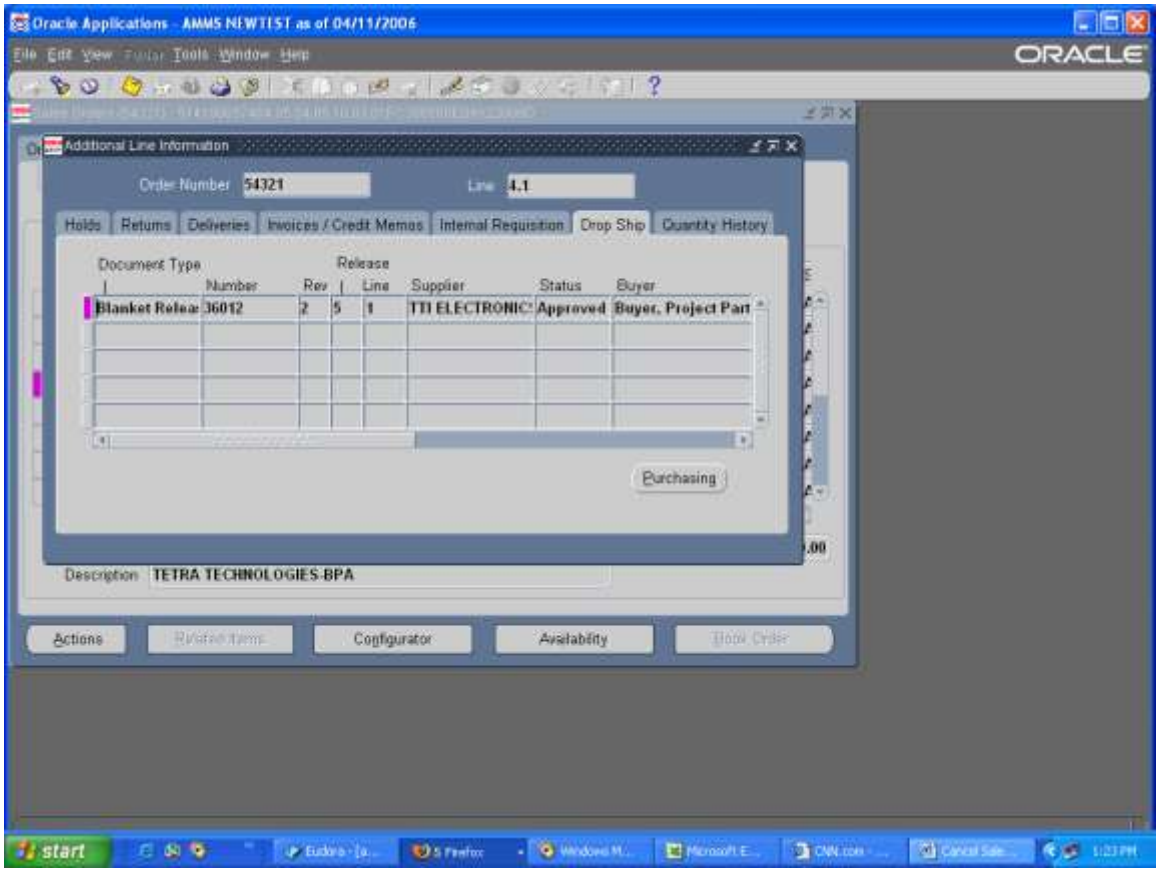
Step Description: At the Additional Line Information window click on the Dropship tab

Expected Results: Window view will change

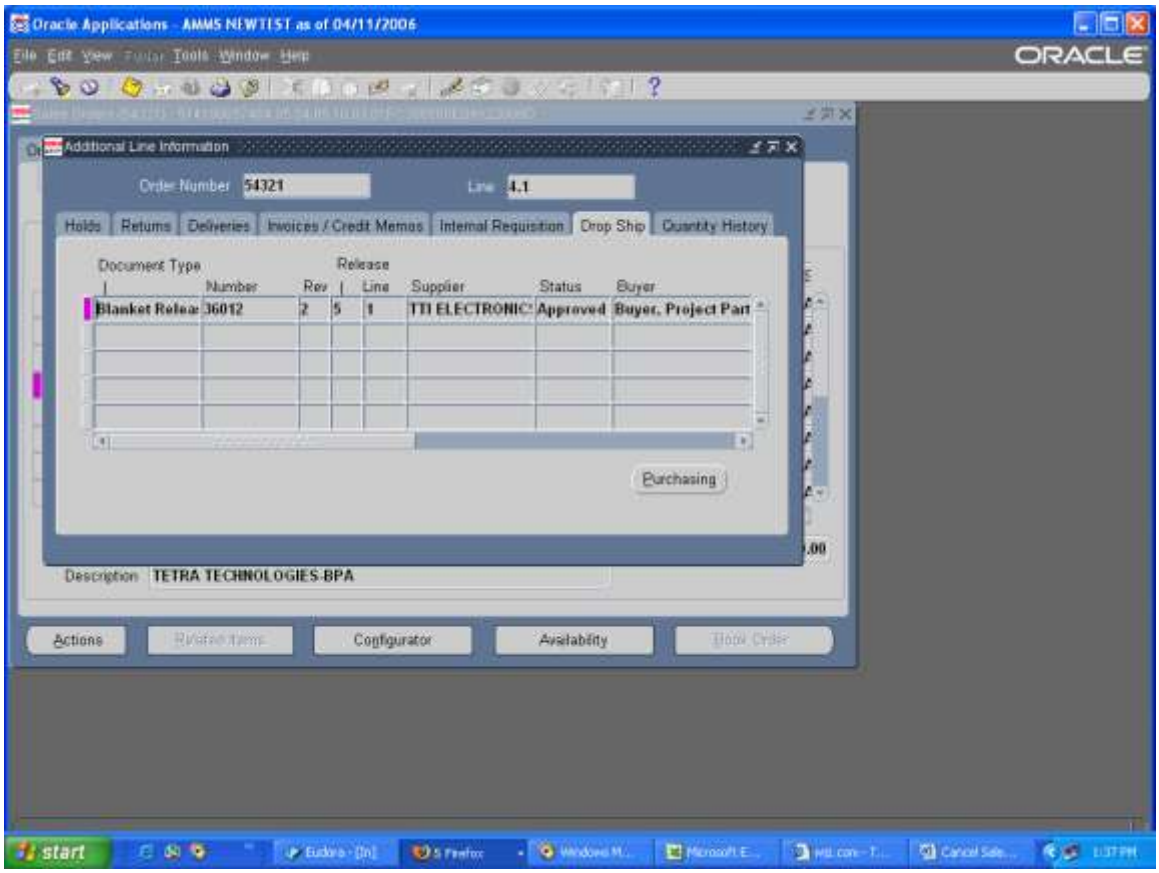


Step Description: The data in the Dropship tab will tell you us there is a purchase requisitions, a purchase order or a blanket release associated with the sales order.

Expected Results: Data will appear

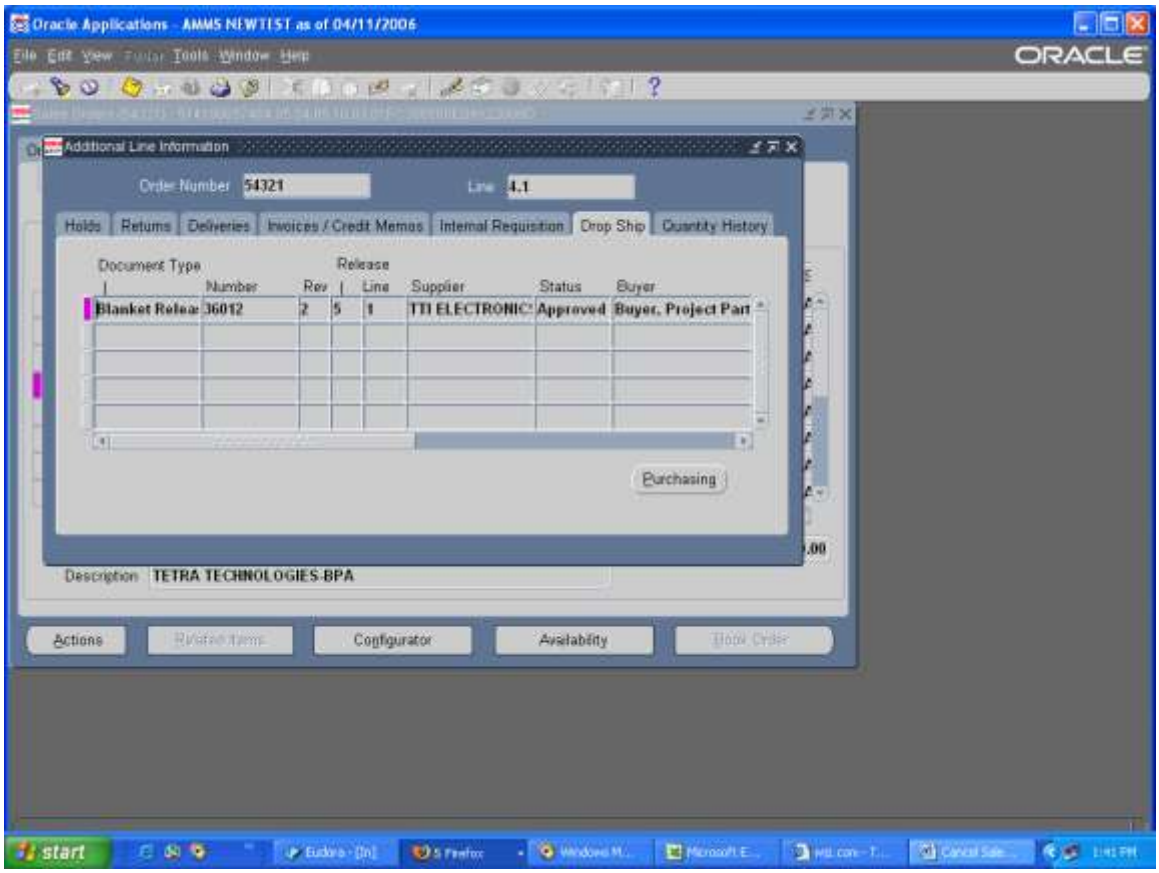


Step Description: If there is an existing Purchase Order or Blanket Release associated the **Sales order cannot be cancelled until the Material Coordinator and the Buyer have received confirmation from the supplier that the associated purchase order has been cancelled. Cancellation of a sales order without this confirmation must be approved by a Team Lead or Branch Head before the transaction is processed in AMMS.** If this item is on the JIT BPA, this must be coordinated through Kim Wedemeyer to cancel the shipment from Office Depot. If this it is being purchased from GSA or DLA, cancellation must first be submitted through DAMES and confirmation of cancellation must be received from GSA or DLA before Sales Order can be cancelled.



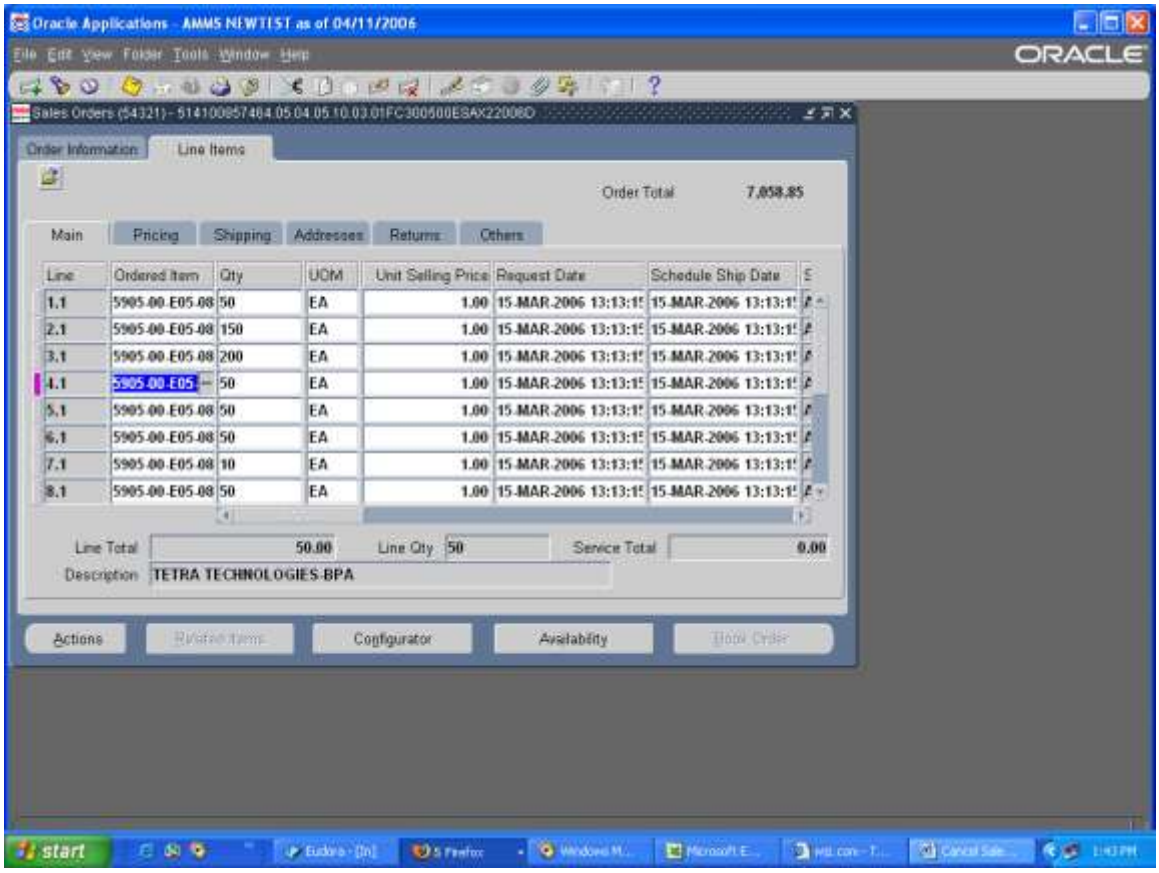
Step Description: Once the Material Coordinator has ensured that the sales order can be cancelled, close the Additional Line Information window

Expected Results: Return to Sales Order window



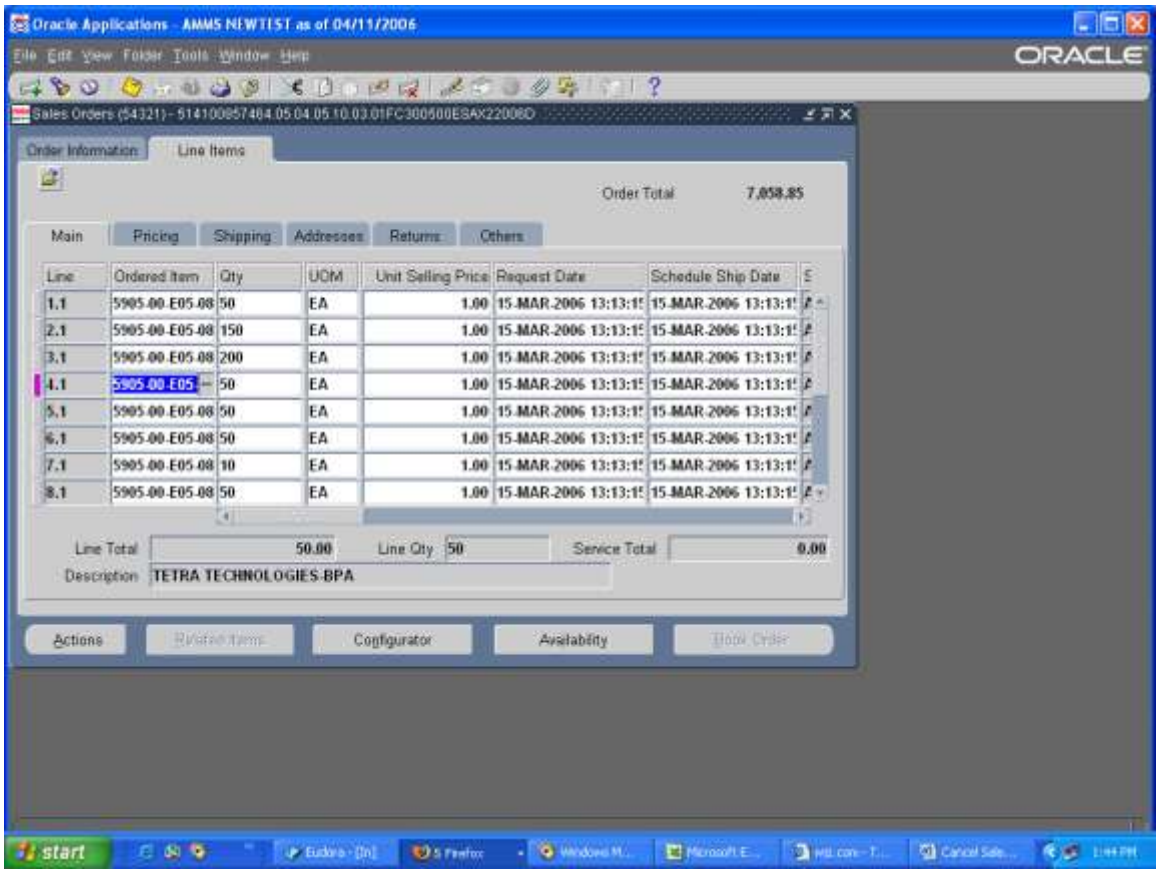
Step Description: Make sure that you are on the line that you want to cancel by clicking on the item you want to cancel.

Expected Results: Purple indicator will be at the beginning of the line to be cancelled



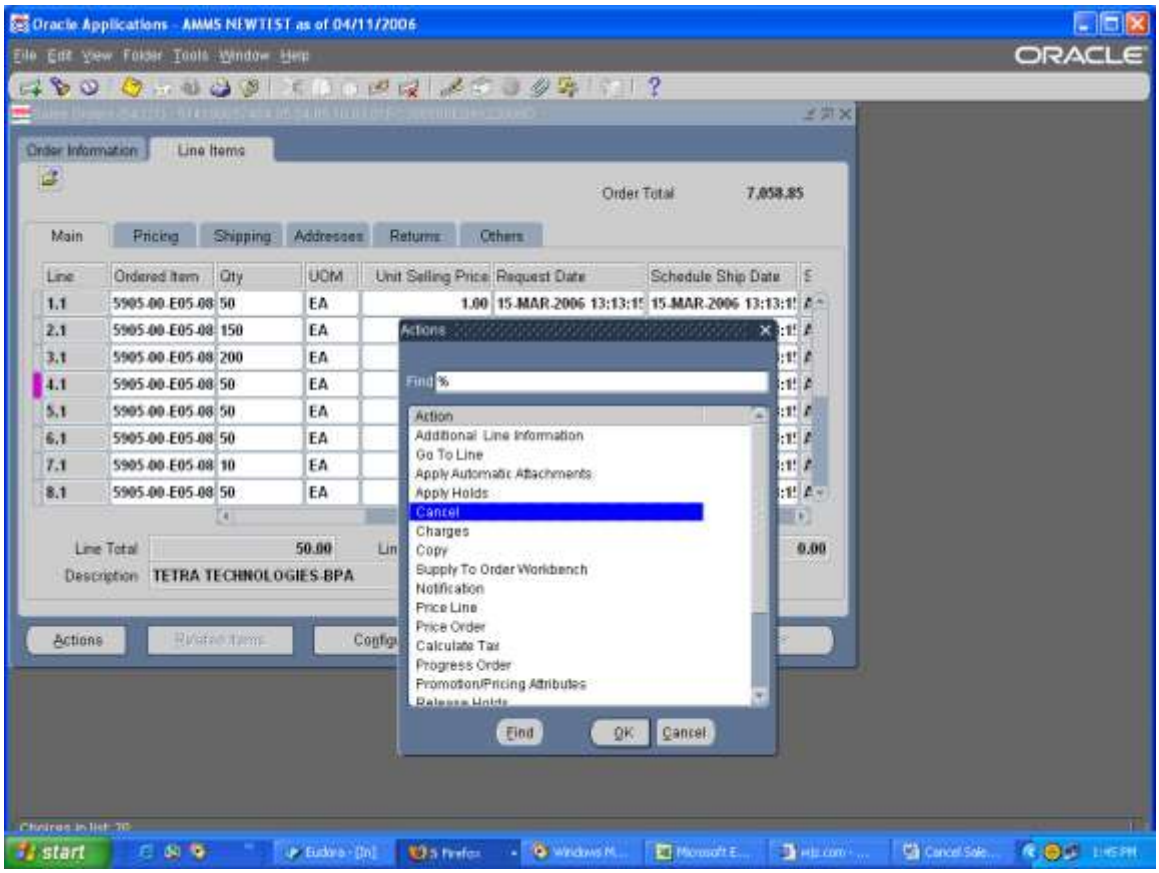
Step Description: Click on the Action button at the bottom left of the window

Expected Results: Action window will appear



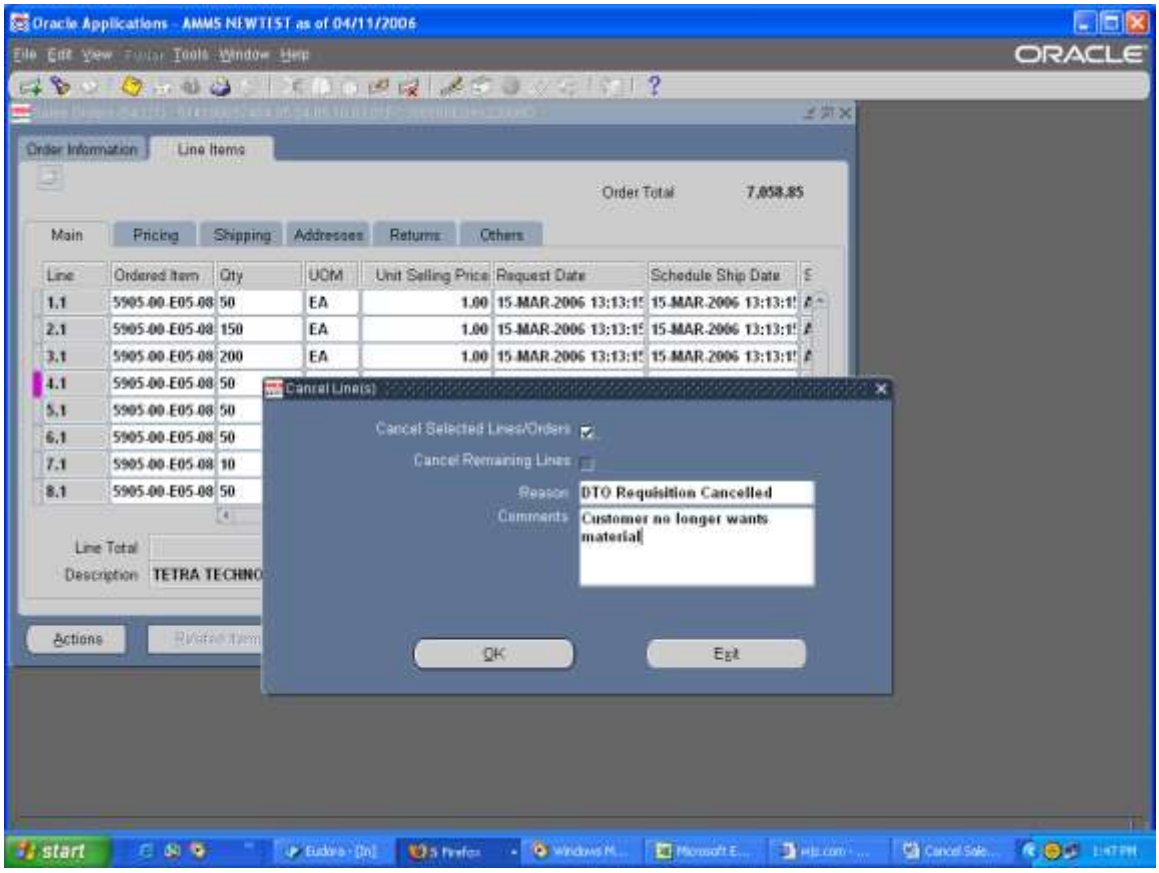
Step Description: Select from the options Cancel, click OK to the Actions window

Expected Results: Cancel Lines window will appear



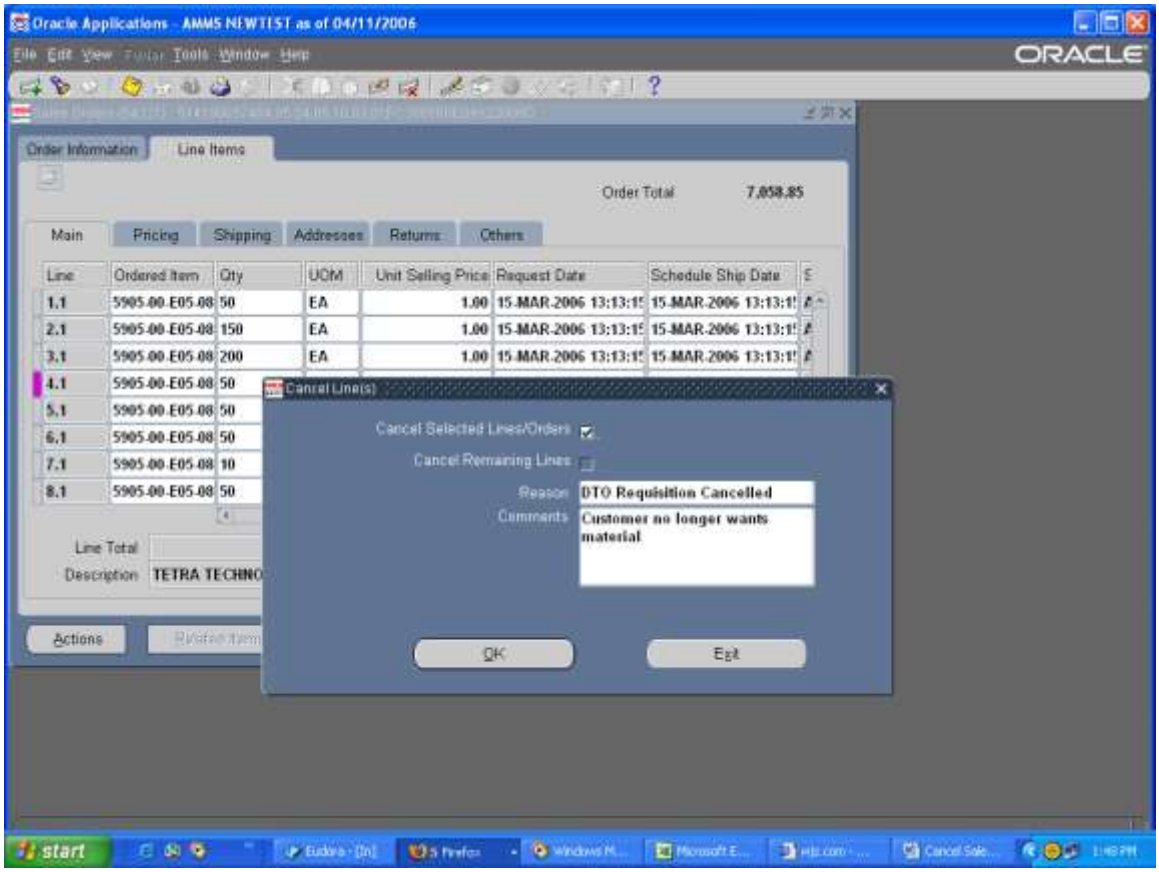
Step Description: At the Reason field click on the List of Values (LOV) and select the appropriate reason for the cancellation, also you can enter a brief description for the cancellation in the Comments window

Expected Results: Fields will be populated



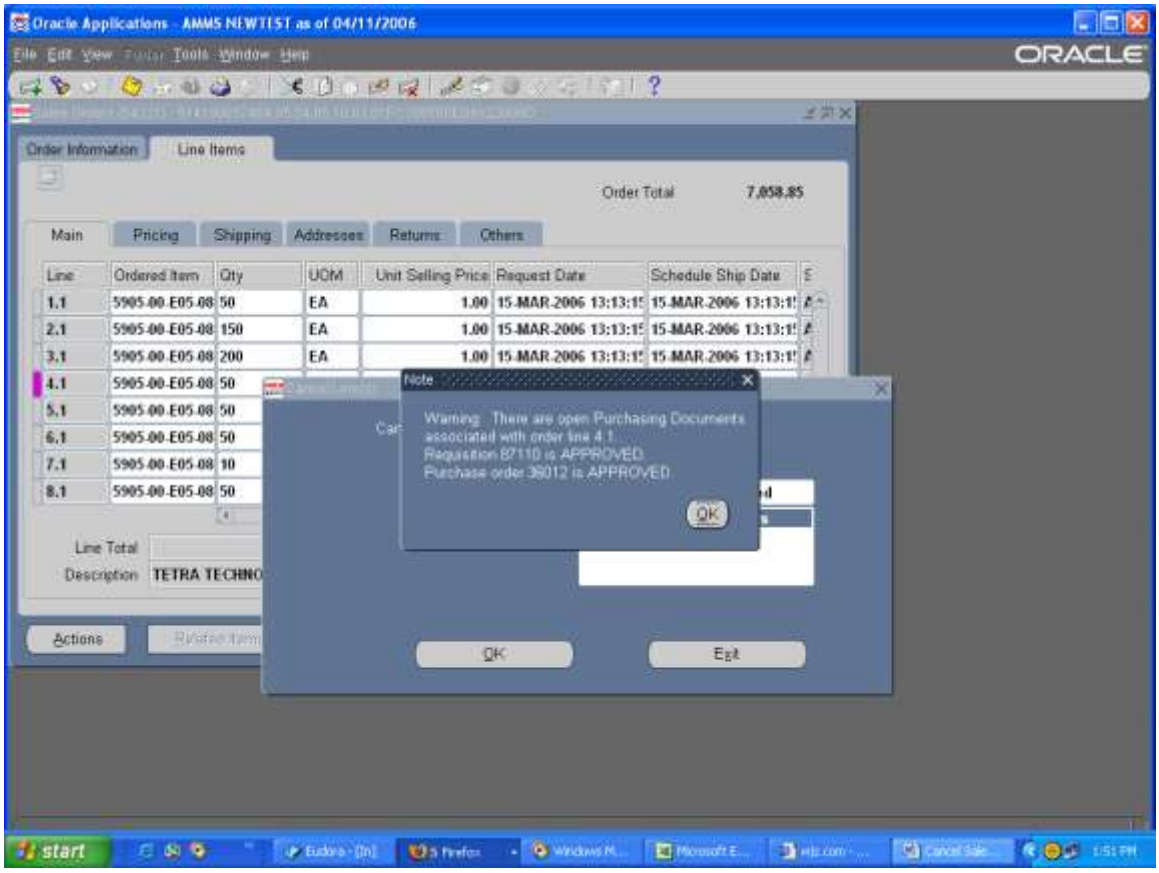
Step Description: Click OK to the Cancel Lines window

Expected Results: Note window will appear



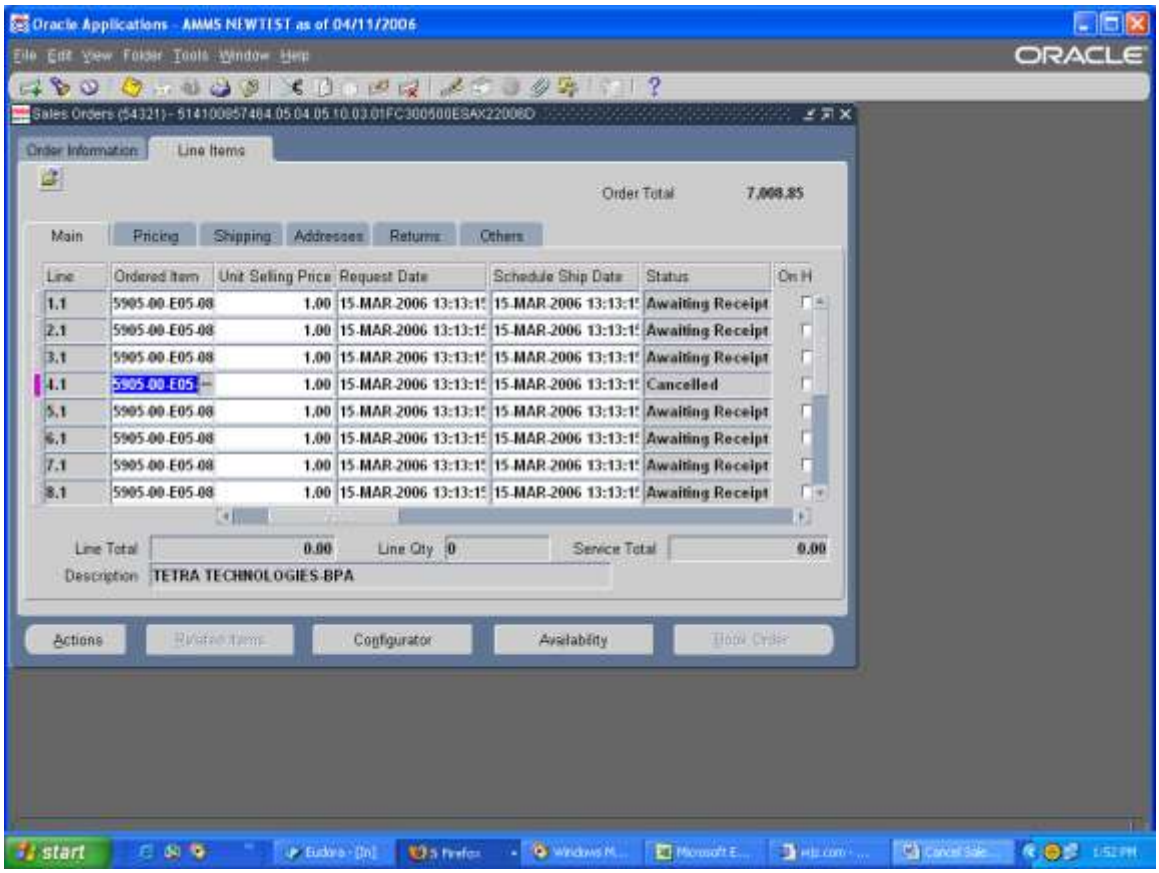
Step Description: The Note lets you know that there is an existing Purchase Requisition and Purchase Order that is associated with the sales order and they are in APPROVED status, click OK to the Note

Expected Results: Window will go away



Step Description: Use the scroll bar and move to the right you will see the status on the line is now Cancelled.

Expected Results: Data changed



PLEASE BE SURE TO ALSO CANCEL PURCHASE ORDER AND PURCHASE REQUISITIONS ASSOCIATED WITH SALES ORDER.

AMMS TRAINING SCRIPT

Cancel Sales Order

Purpose

The purpose of this training script is to give instructions on how to cancel a sales order, and check to make sure there is not an open Purchase Order, or Purchase Requisitions for the sales order line.

Audience

Material Coordinator and Supply Team Lead

Prepared By	Theresa Coulson
Creation Date:	04/26/2006
Document Name	Cancel Sales Order.doc
Version	2
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Order Management.	

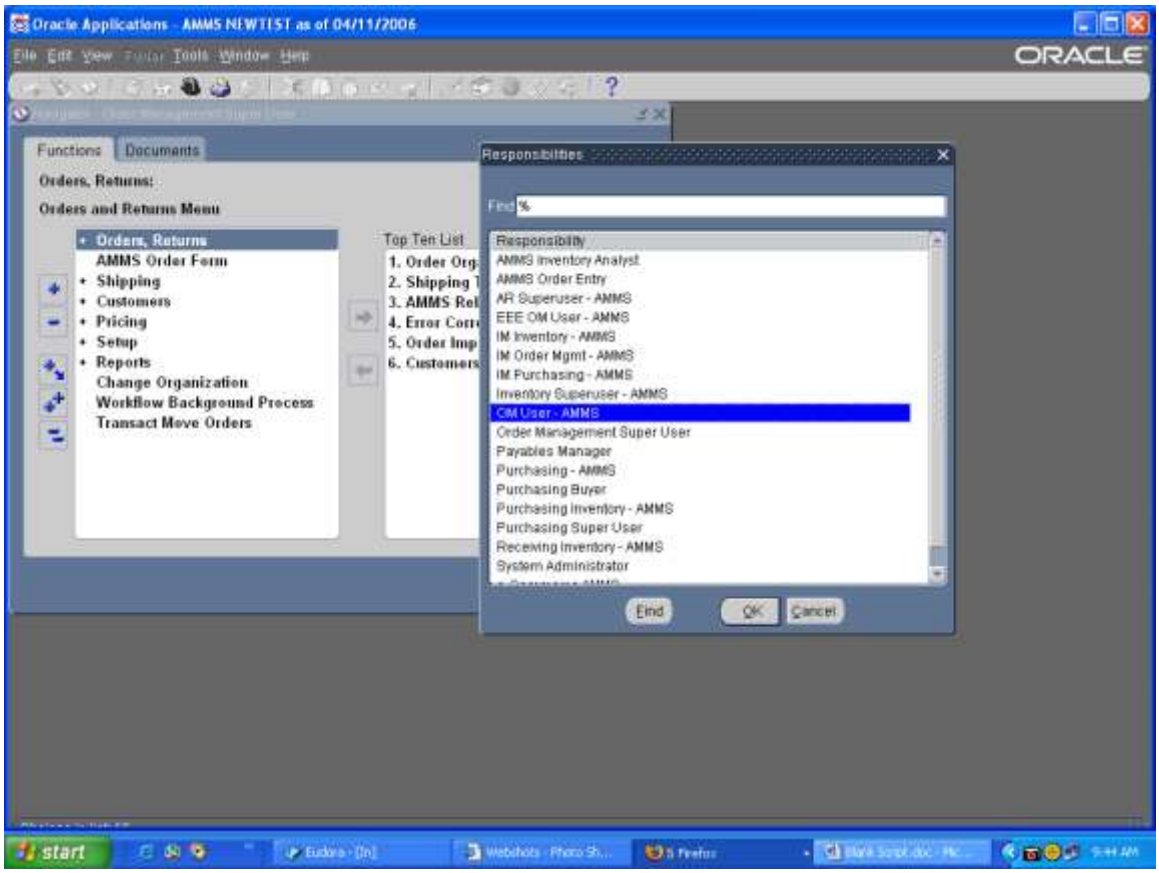
AMMS Training Script: This will give instructions on how to cancel a sales order, and check to make sure there is not an open Purchase Order, or Purchase Requisitions for the sales order line.

YOU CAN ONLY CANCEL AN ENTIRE SALES ORDER IF NONE OF THE LINES ARE CLOSED. ALL LINES ON THE SALES ORDER MUST BE OPEN TO CANCEL ENTIRE SALES ORDER.

Note: If you are cancelling a Sales Order and the Order Type is DTO but Requisitions have yet generated, even if you cancel the sales order Oracle will still generate purchase requisitions for the order/lines cancelled. Be sure to also go back and cancel all purchase requisitions

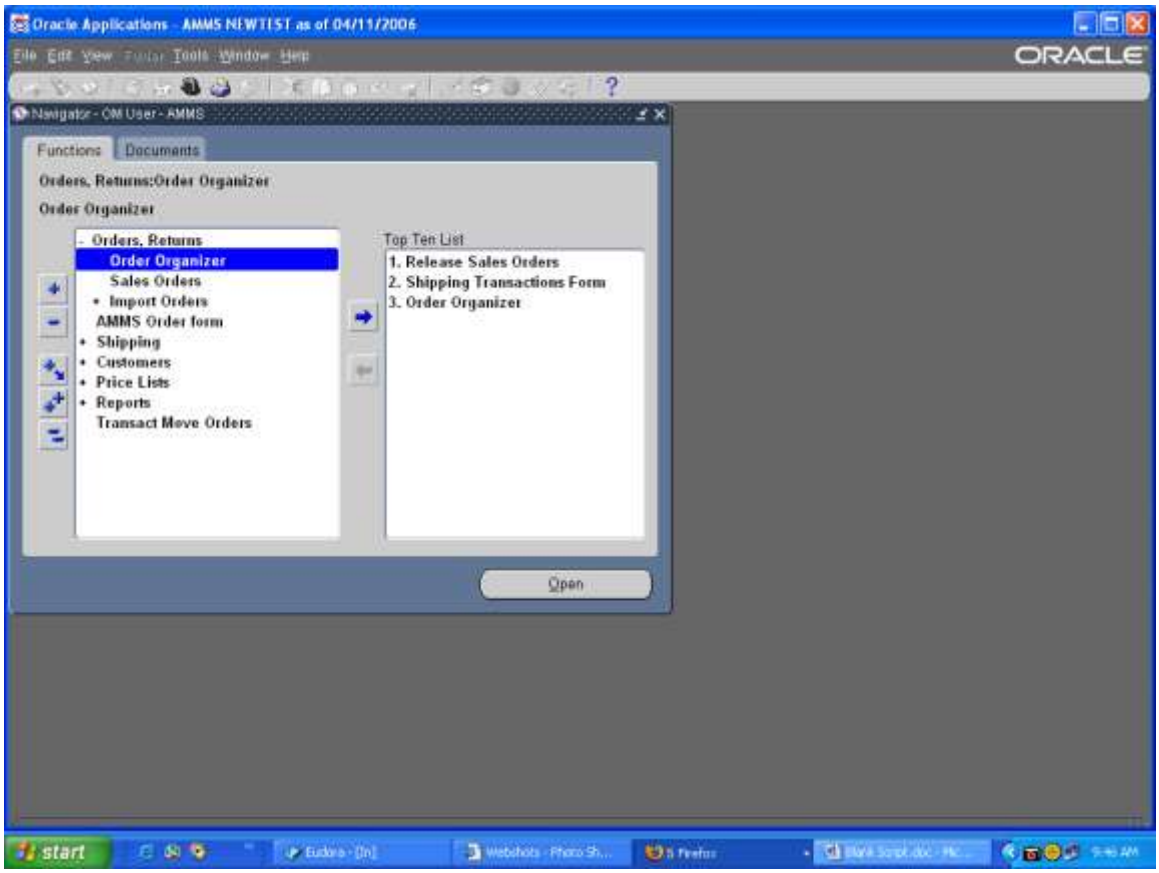
Step Description: Sign onto Oracle and select OM User AMMS responsibility

Expected Results: OM User AMMS main menu will appear



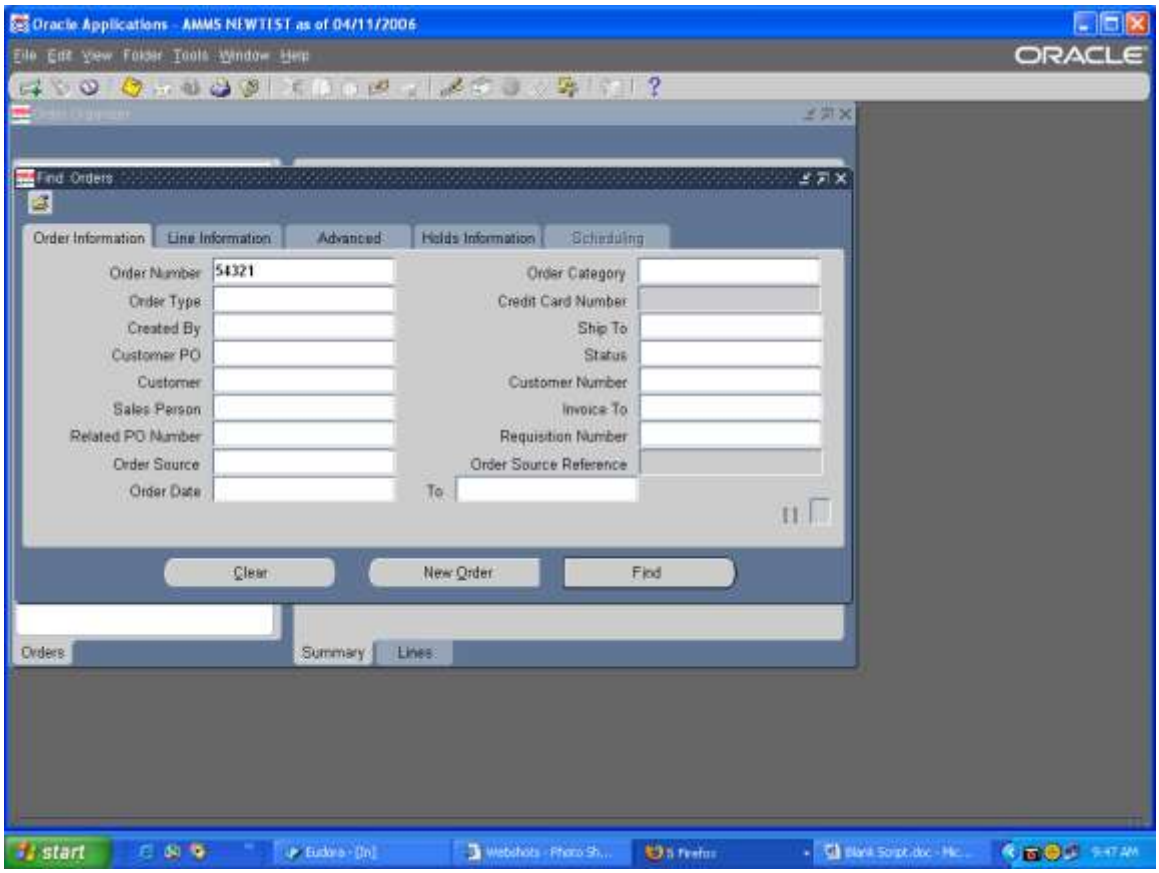
Step Description: From the OM User AMMS main menu select Orders, Return > Order Organizer, click on the Open button

Expected Results: Find Orders window will appear



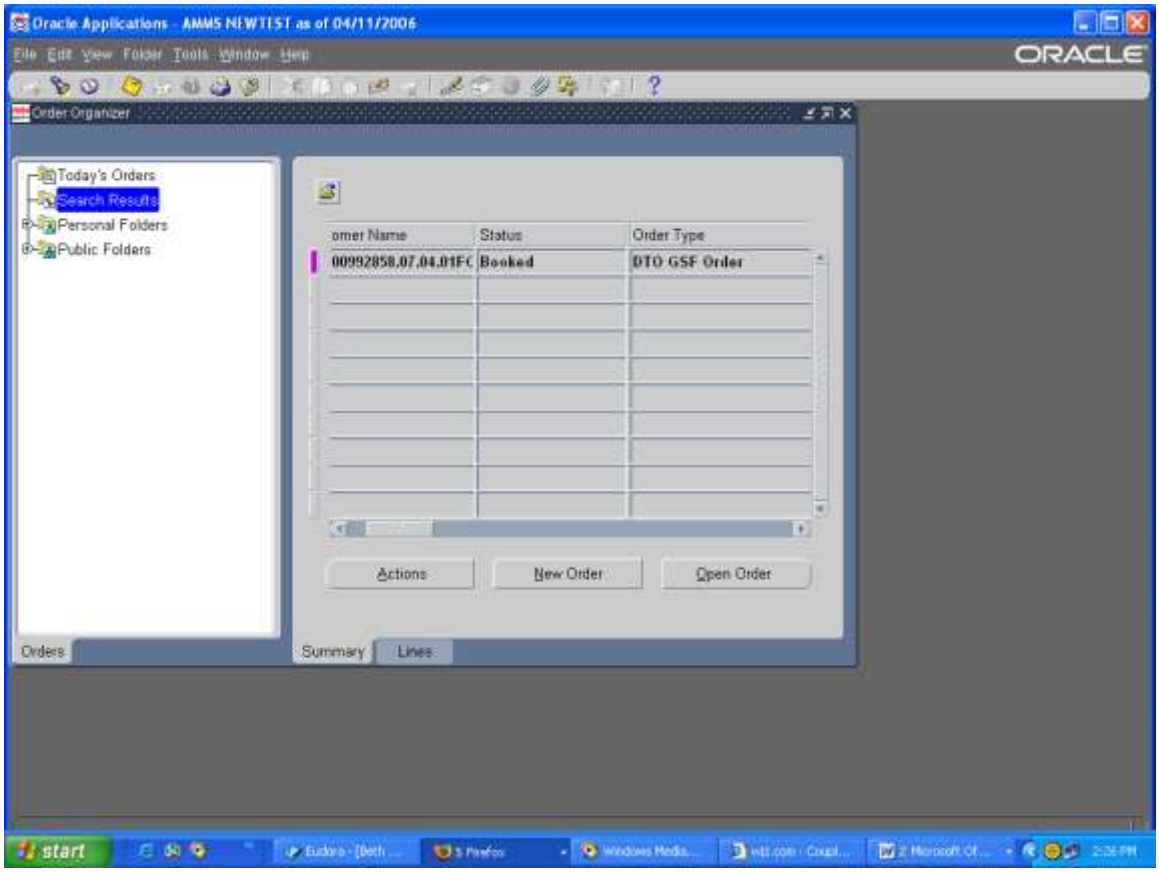
Step Description: In the Order Number field enter the sales order number that you want to cancel a line on, click on the Find button

Expected Results: Field will be populated and Order Organizer window will appear



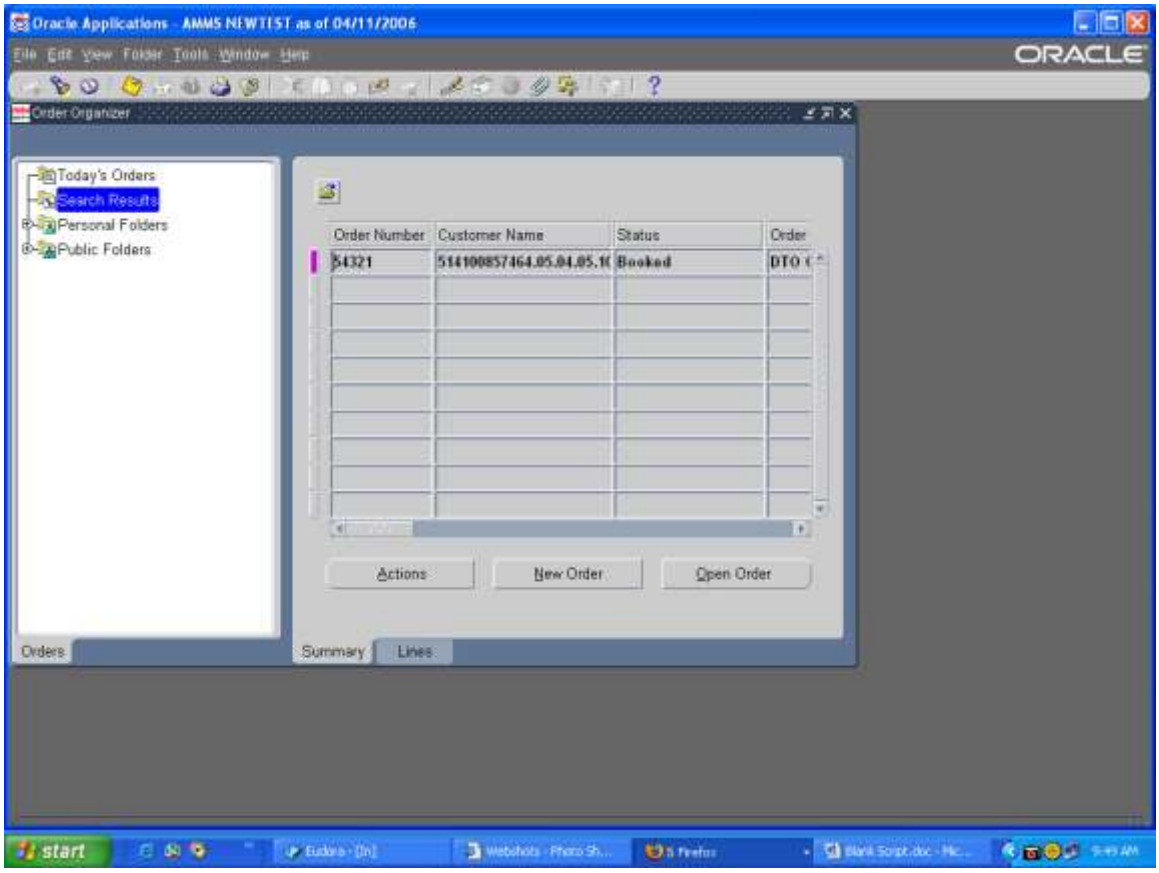
Step Description: Take note of the Status, you can not cancel a sales order that is Closed, the Status should be Booked. Use the scroll bar and move to the right to the Order Type. If the Order type is DTO, **STOP!!**

When you want to cancel a sales order that is DTO you MUST first check to make sure there is not an existing Purchase Order or Purchase Requisition associated with the sales order line.



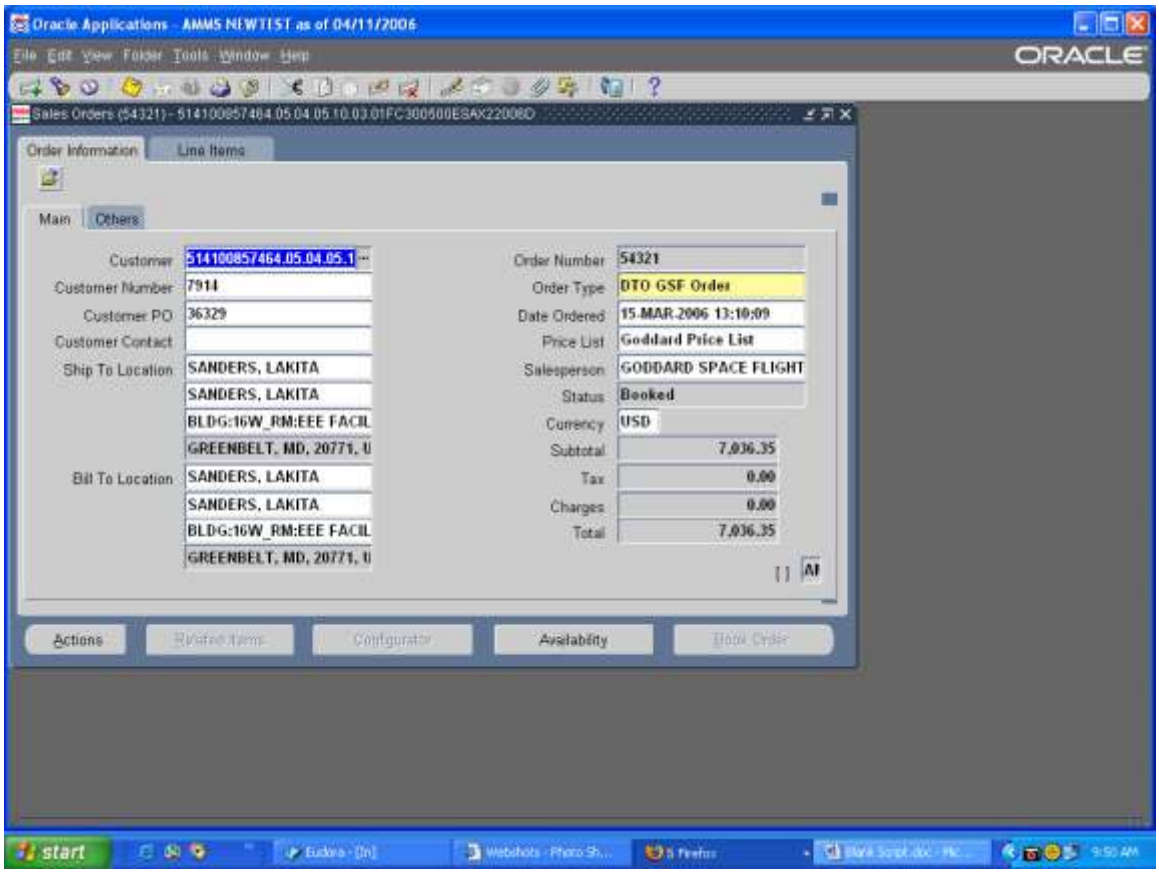
Step Description: Click on the Open Order button

Expected Results: Sales Order window will appear



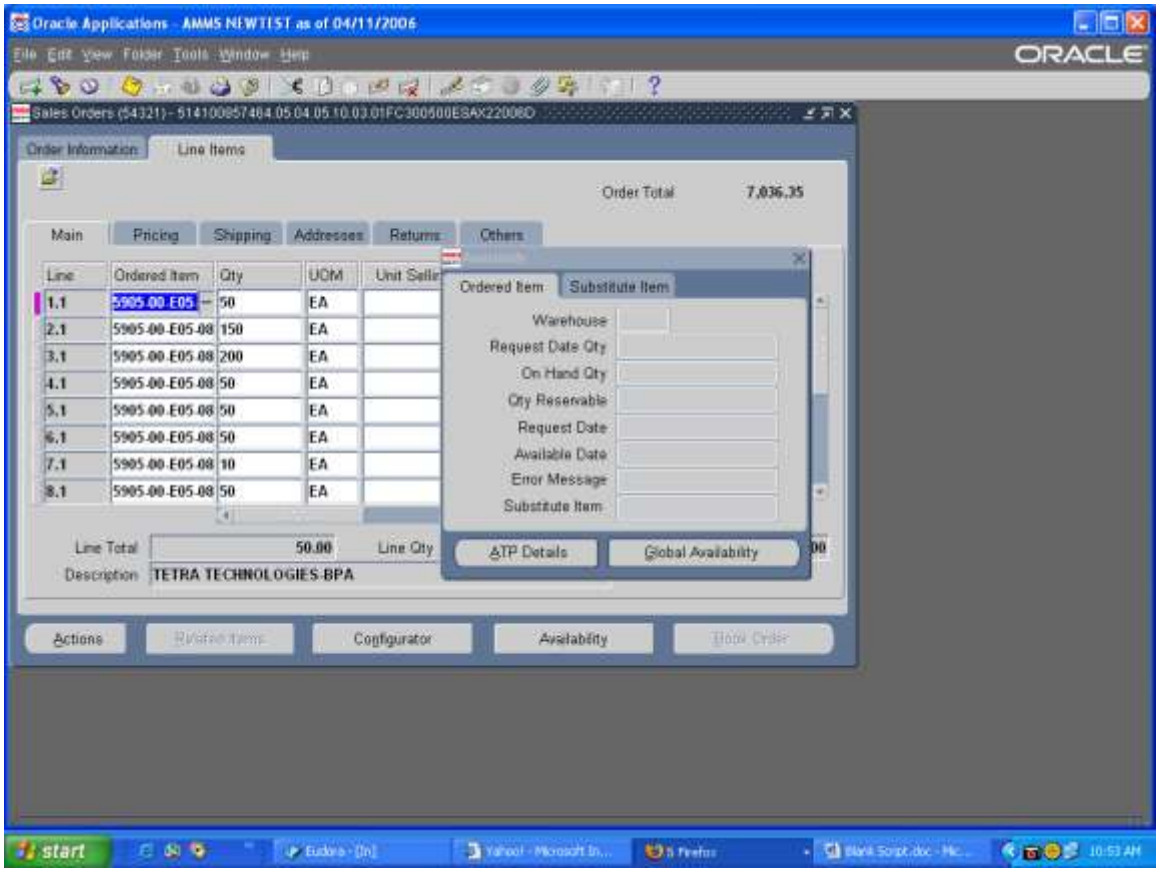
Step Description: Click on the Line Items tab

Expected Results: Window view will change to Line Item information



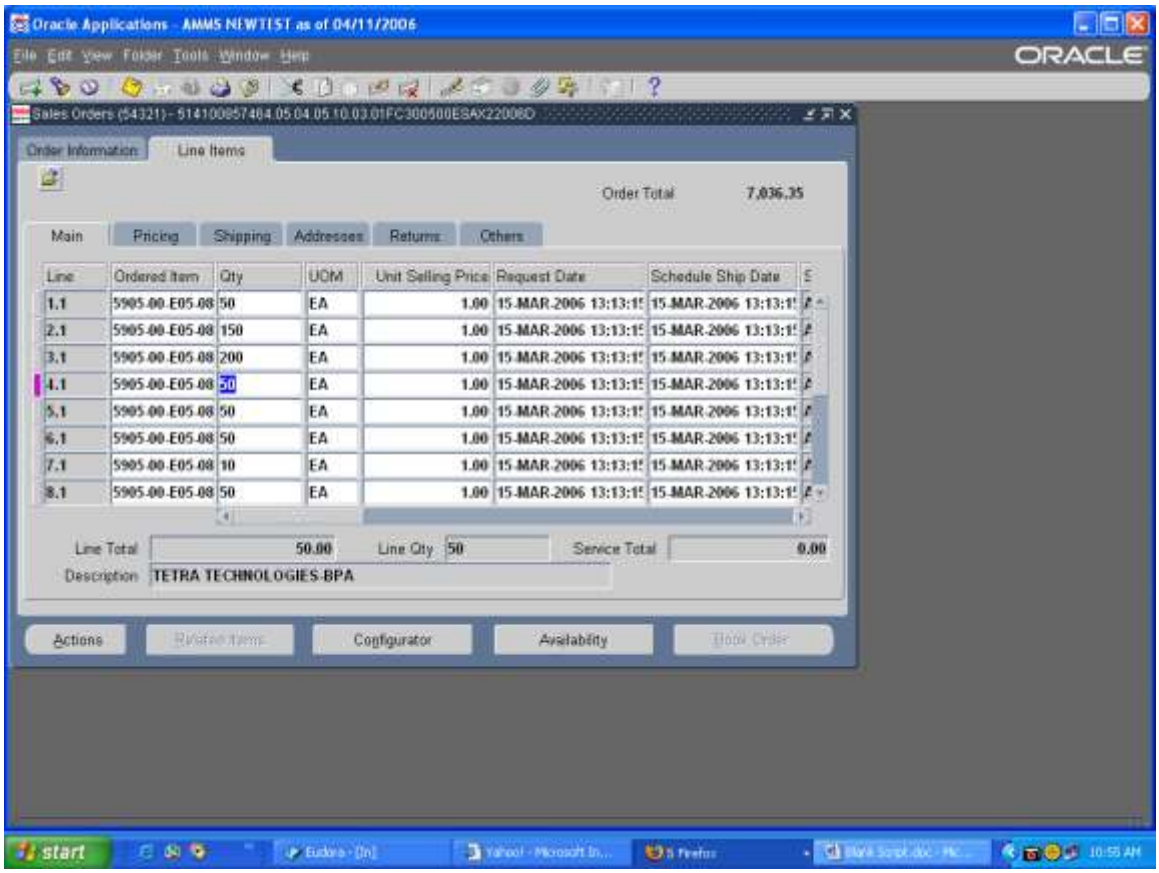
Step Description: Close the Availability window

Expected Results: Window will go away



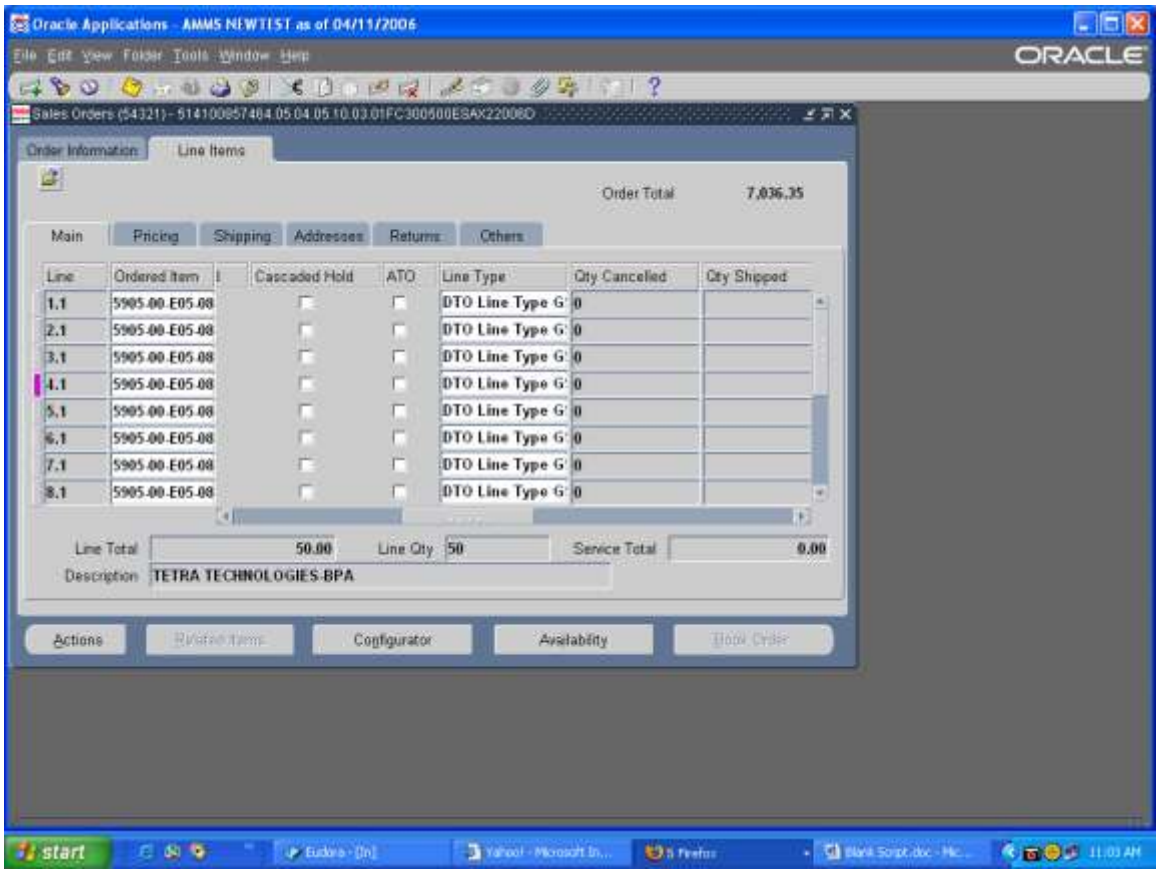
Step Description: Check every line that has a status of Awaiting Receipt that is to be cancelled by clicking on the line and the purple line indicator will be next to the line selected. If the status on the line is Awaiting Shipping you also need to check for an open Purchase order or Requisitions. If the status is Picked or Partial Picked you there is an existing open pick slip for this material and the pick slip must be backordered before sales order can be cancelled

Expected Results: Line will be selected



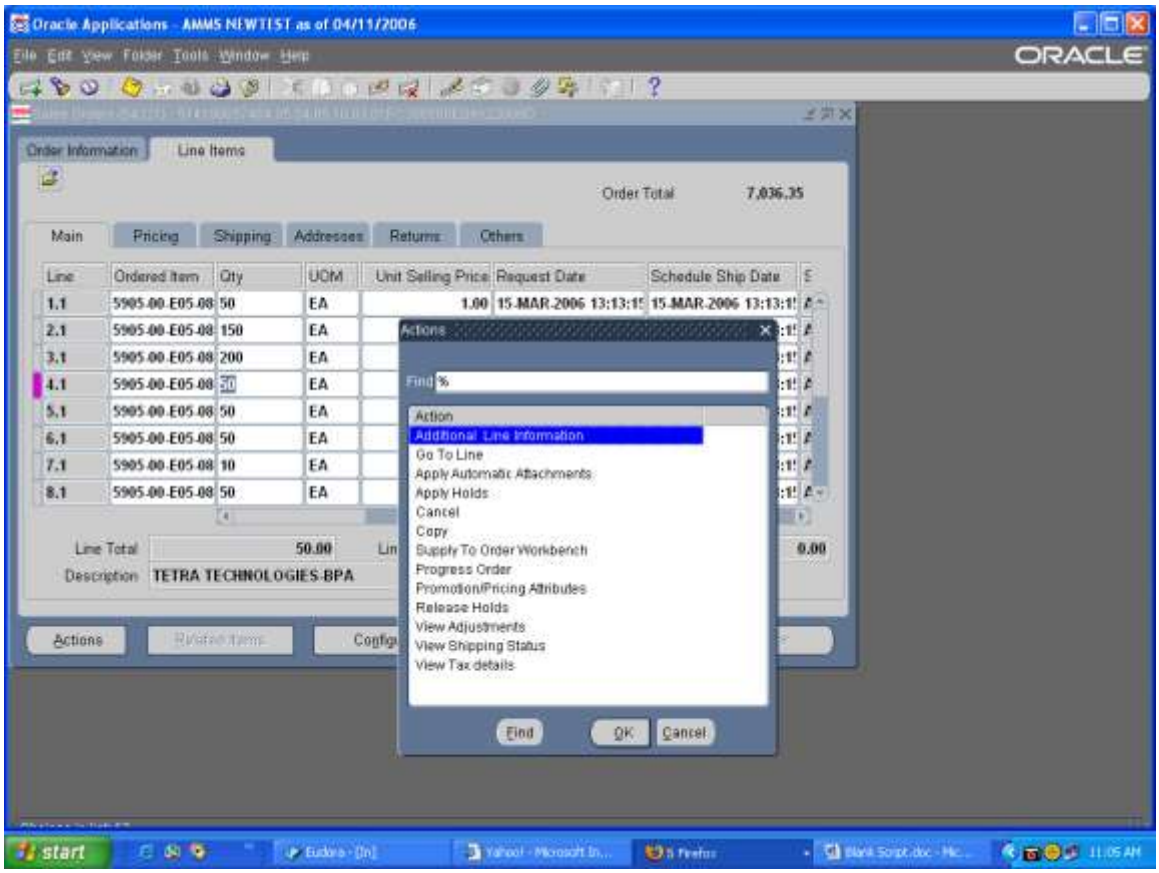
Step Description: To check for an existing PO or Requisitions click on the Actions button at the bottom left of the window

Expected Results: Action window will appear



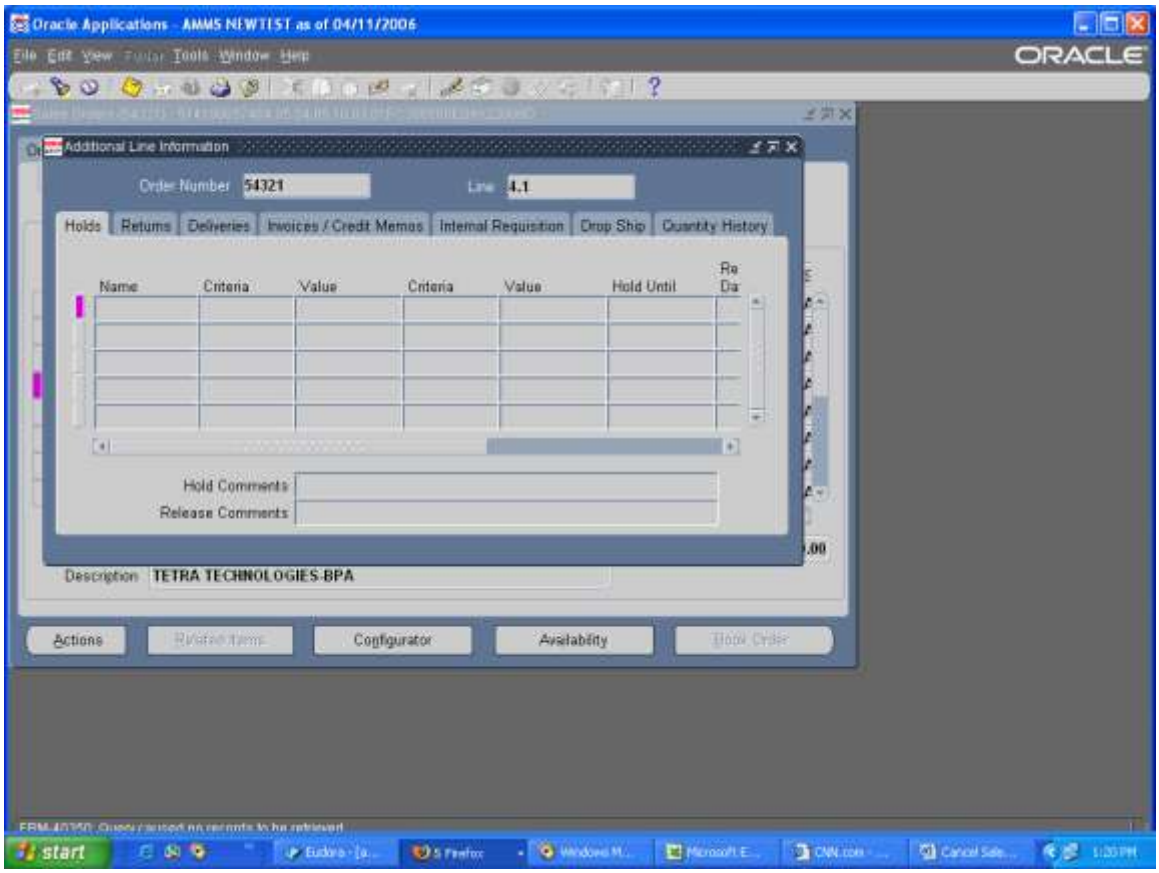
Step Description: From the Action window select Additional Line Information, click OK

Expected Results: Additional Line Information window will appear



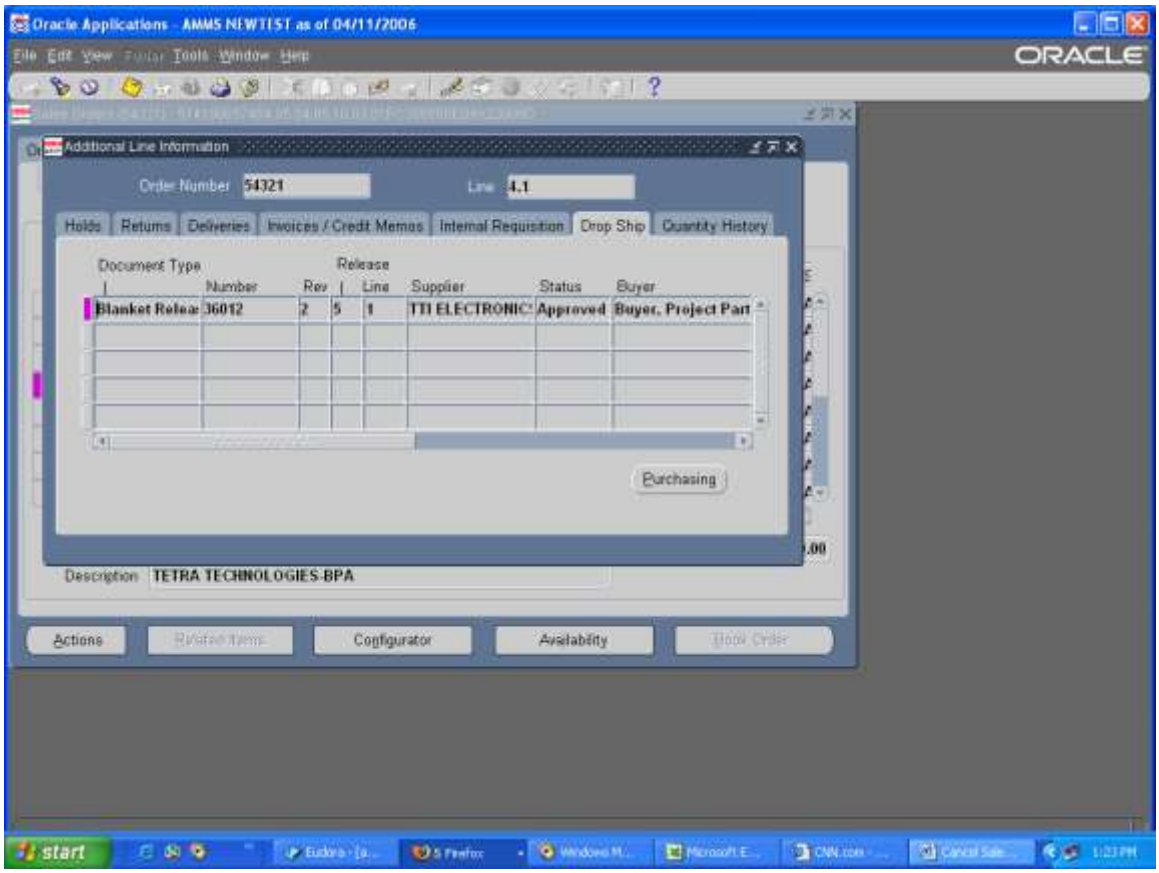
Step Description: At the Additional Line Information window click on the Dropship tab

Expected Results: Window view will change

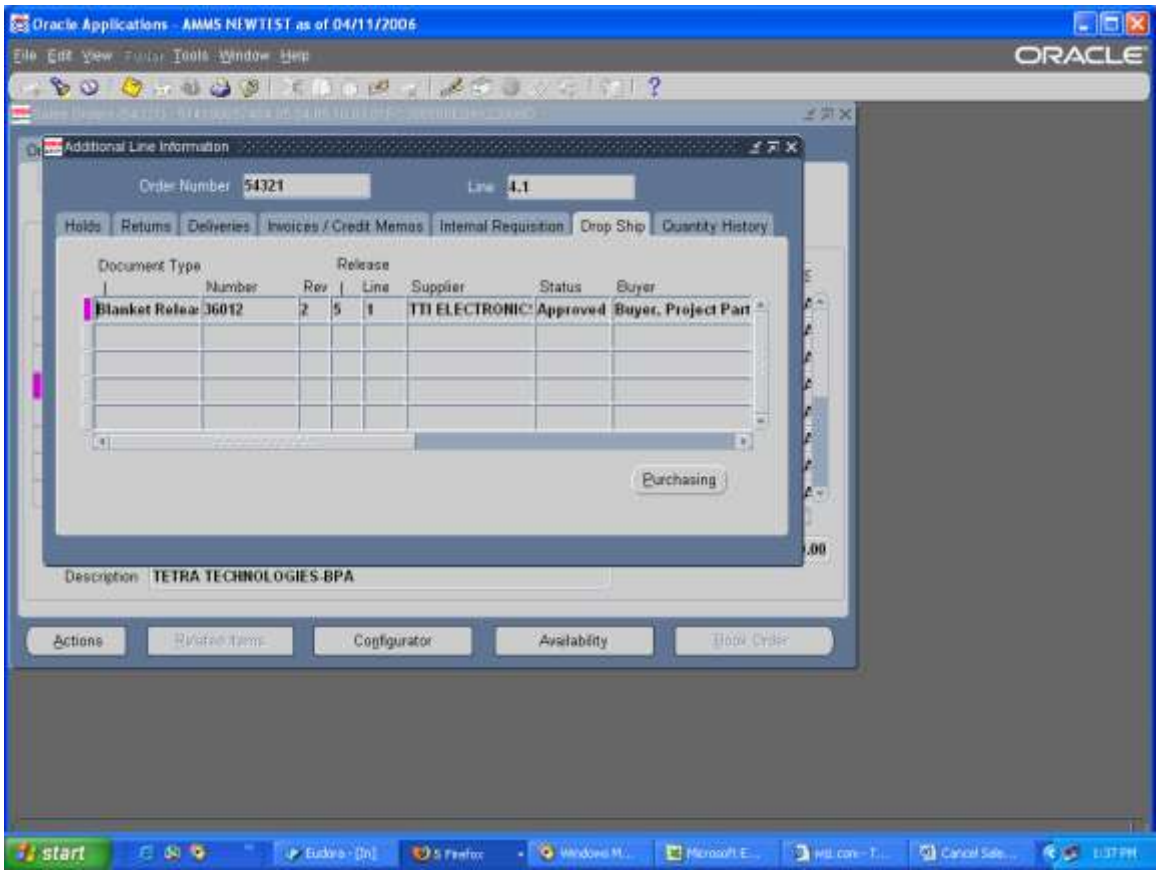


Step Description: The data in the Dropship tab will tell you us there is a purchase requisitions, a purchase order or a blanket release associated with the sales order.

Expected Results: Data will appear

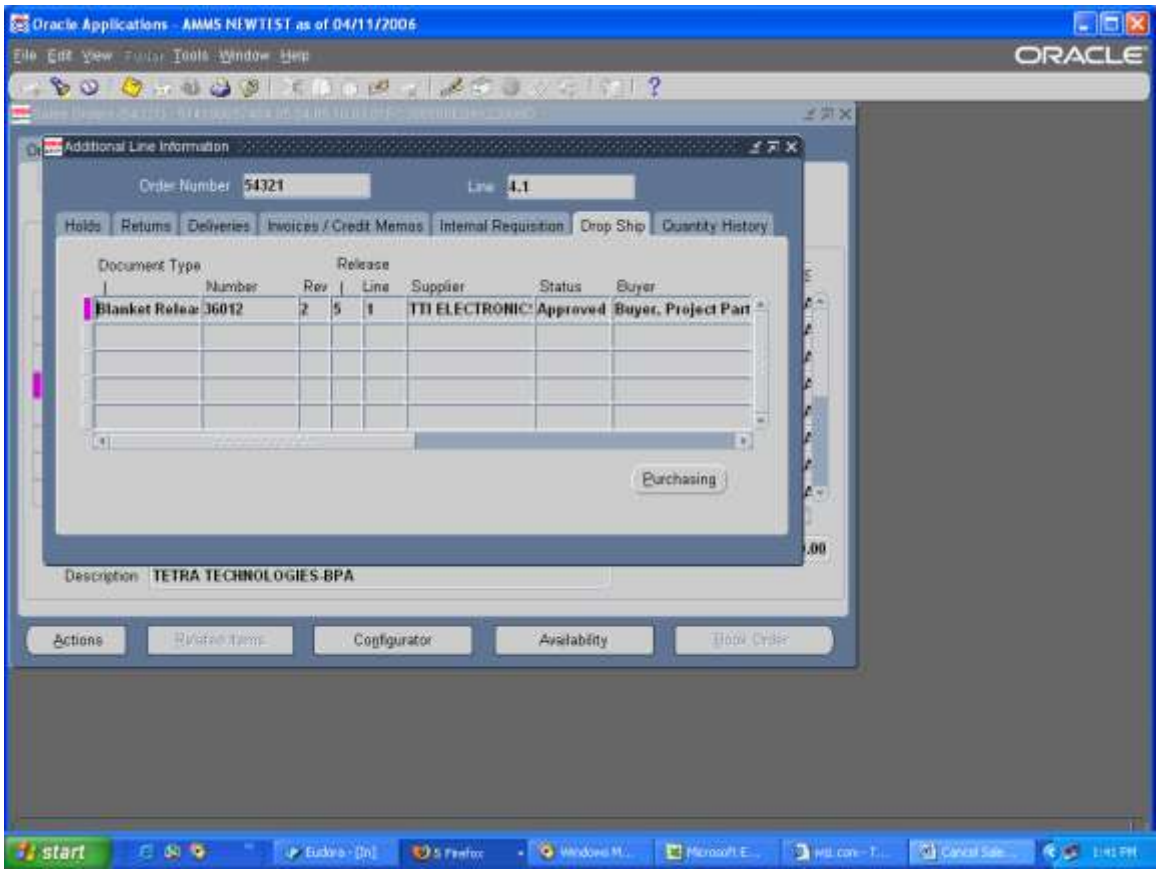


Step Description: If there is an existing Purchase Order or Blanket Release associated with the **<u>Sales order cannot be cancelled until the MC and the Buyer have received confirmation from the supplier that the associated purchase order has been cancelled. Cancellation of a sales order without this confirmation must be approved by a Team Lead or Branch Head before the transaction is processed in AMMS</u>**. If this item is on the JIT BPA, this must be coordinated through Kim Wedemeyer to cancel the shipment from Office Depot. If this it is being purchased from GSA or DLA, cancellation must first be submitted through DAMES and confirmation of cancellation must be received from GSA or DLA before Sales Order can be cancelled.



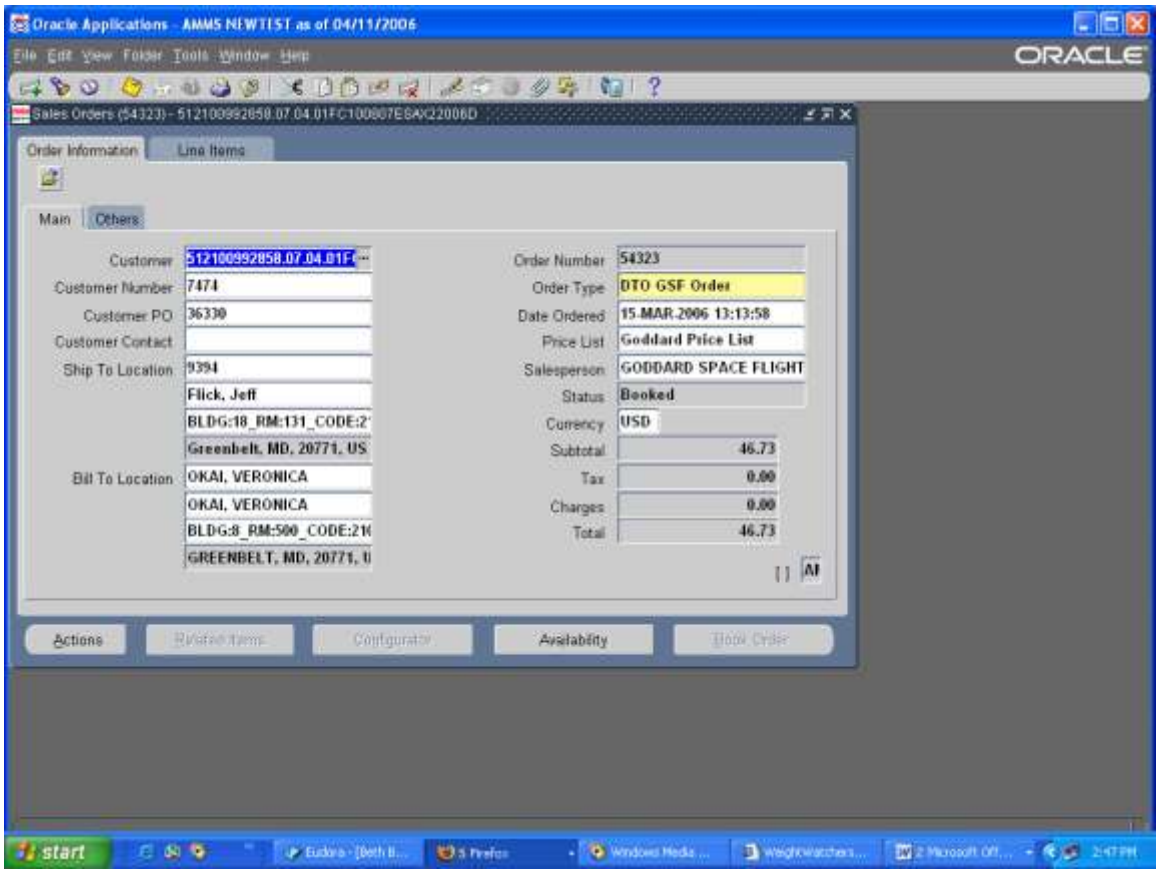
Step Description: Once the Material Coordinator has ensured that the sales order can be cancelled, close the Additional Line Information window

Expected Results: Return to Sales Order window



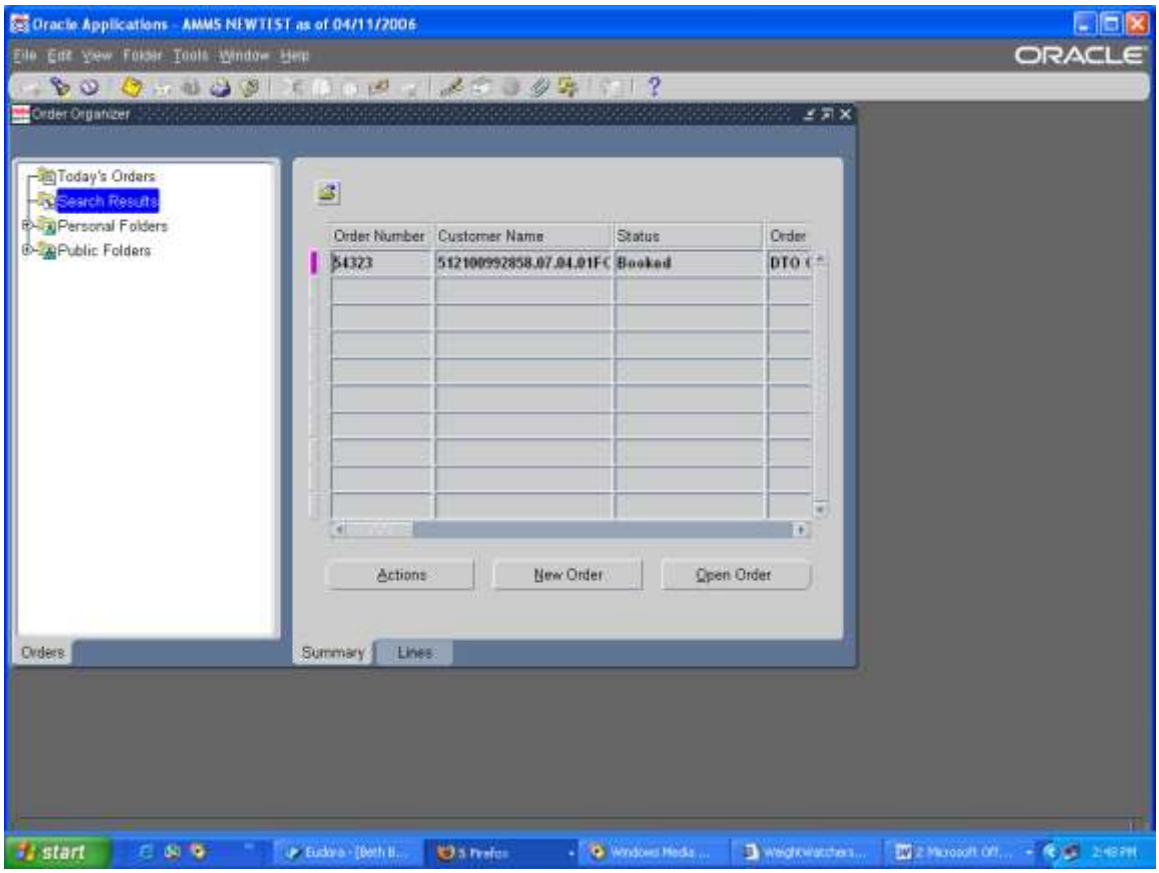
Step Description: Close the Sales Order window

Expected Results: Return to the Order Organizer window



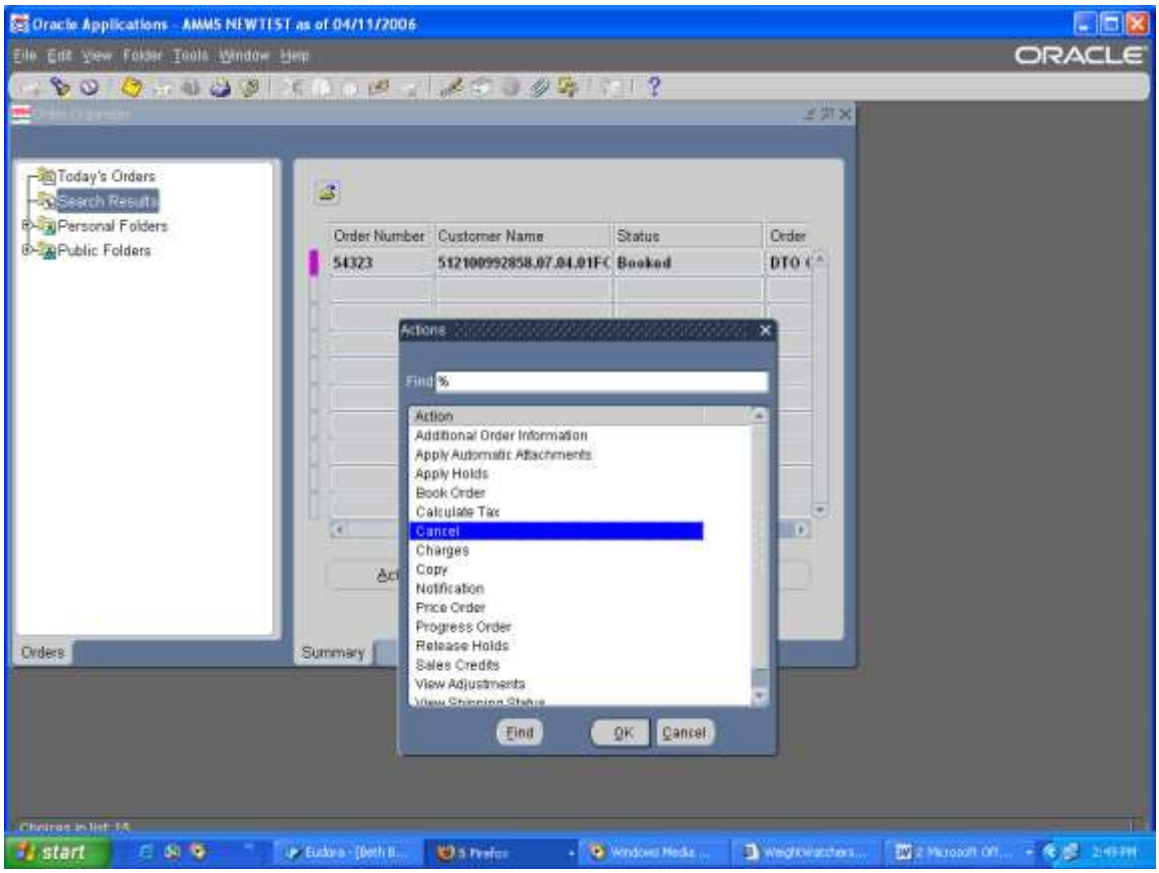
Step Description: Only if you want to/can cancel all of the lines on a sales order, click on the Action button

Expected Results: Action window will appear



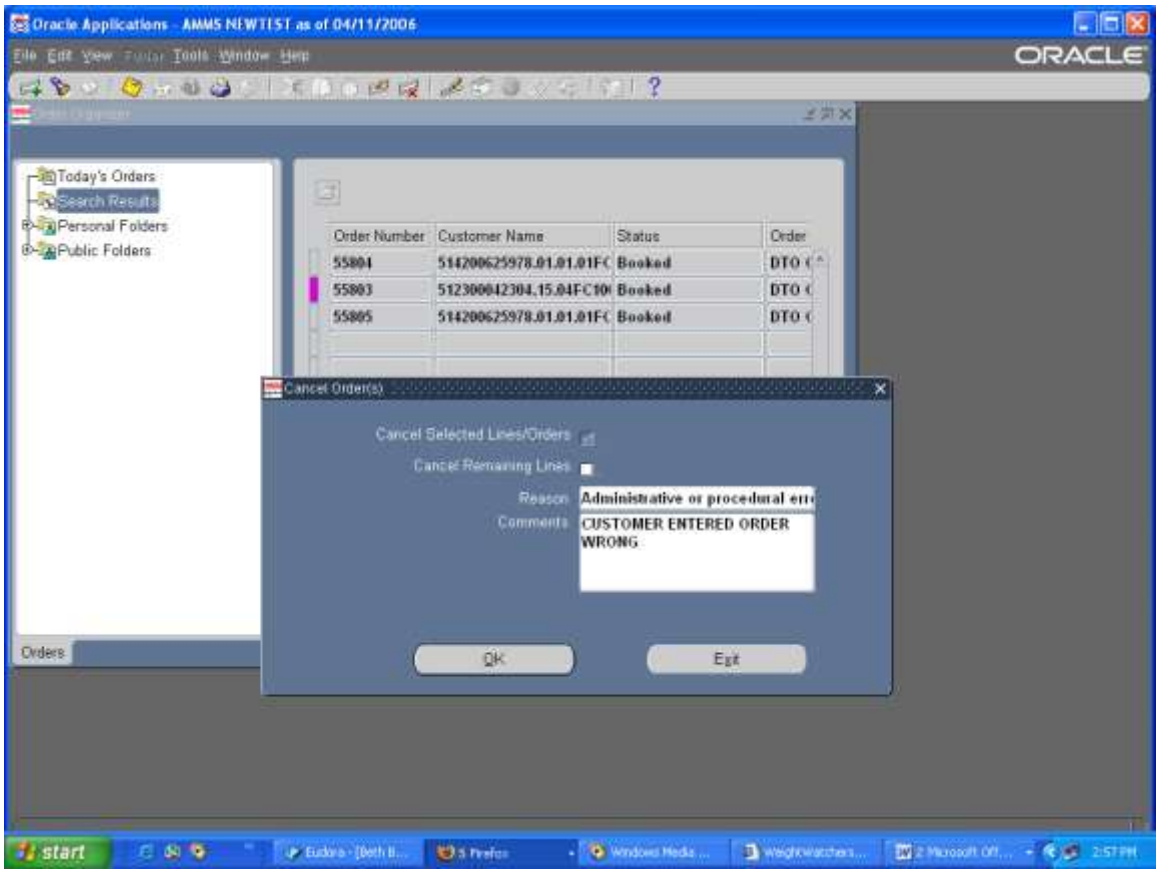
Step Description: From the Action window select Cancel, click OK to the Action window

Expected Results: Cancel Order window will appear



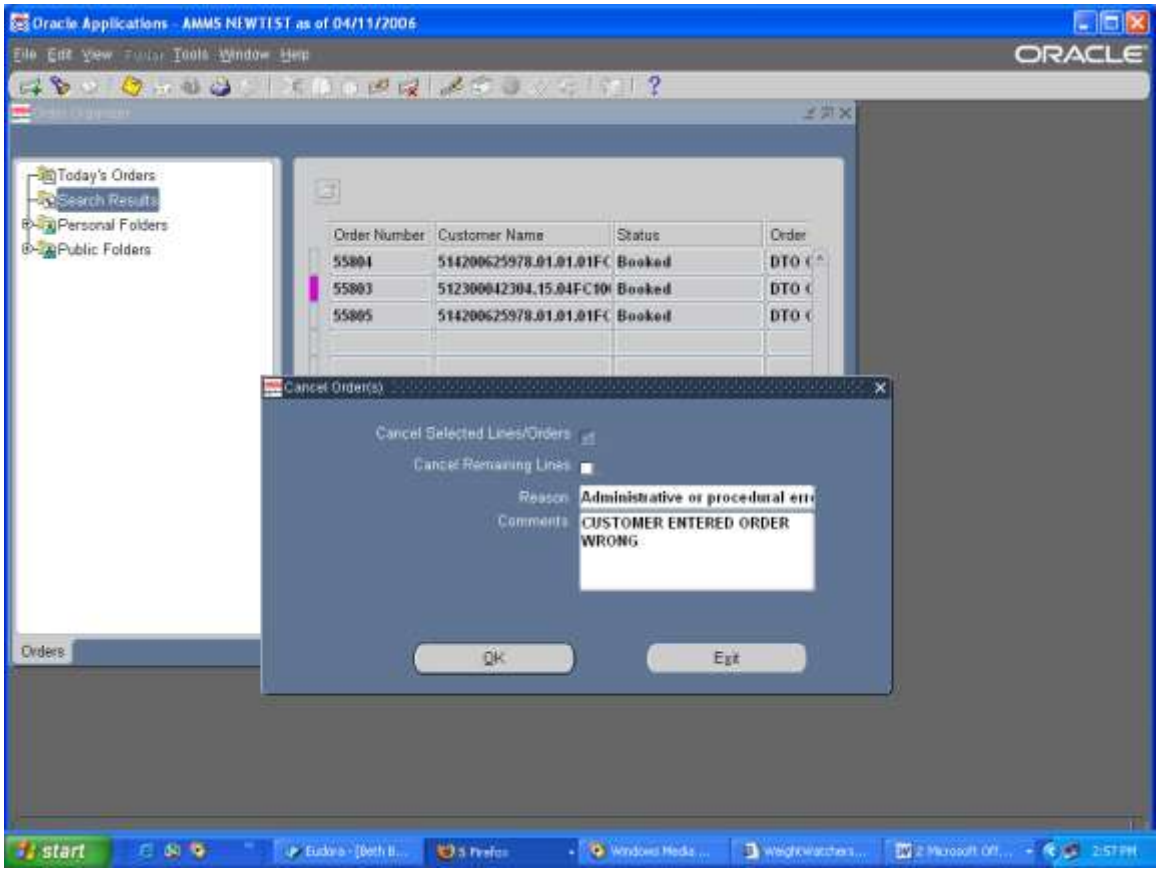
Step Description: At the Reason field click on the List of Values (LOV) and select the appropriate reason for the cancellation, also you can enter a brief description for the cancellation in the Comments window

Expected Results: Fields will be populated



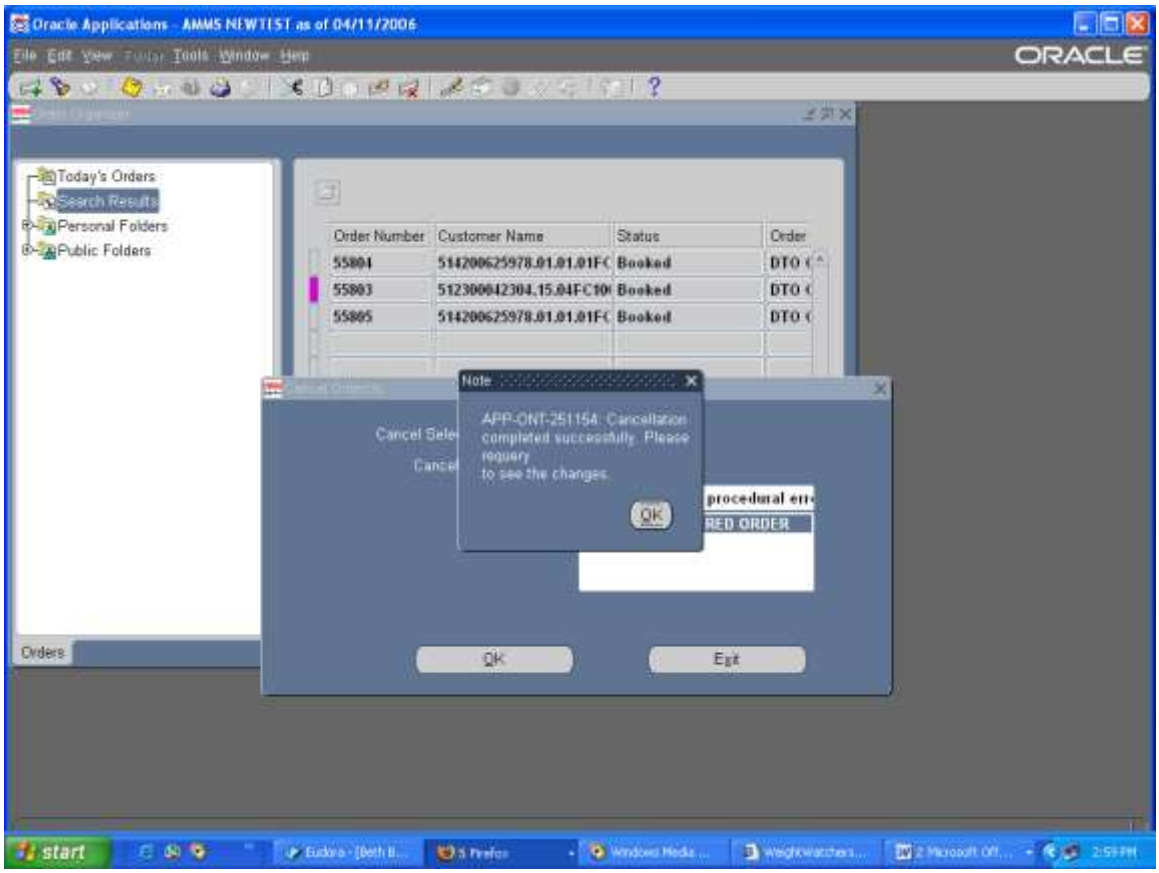
Step Description: Click OK to the Cancel Order window

Expected Results: Note window will appear

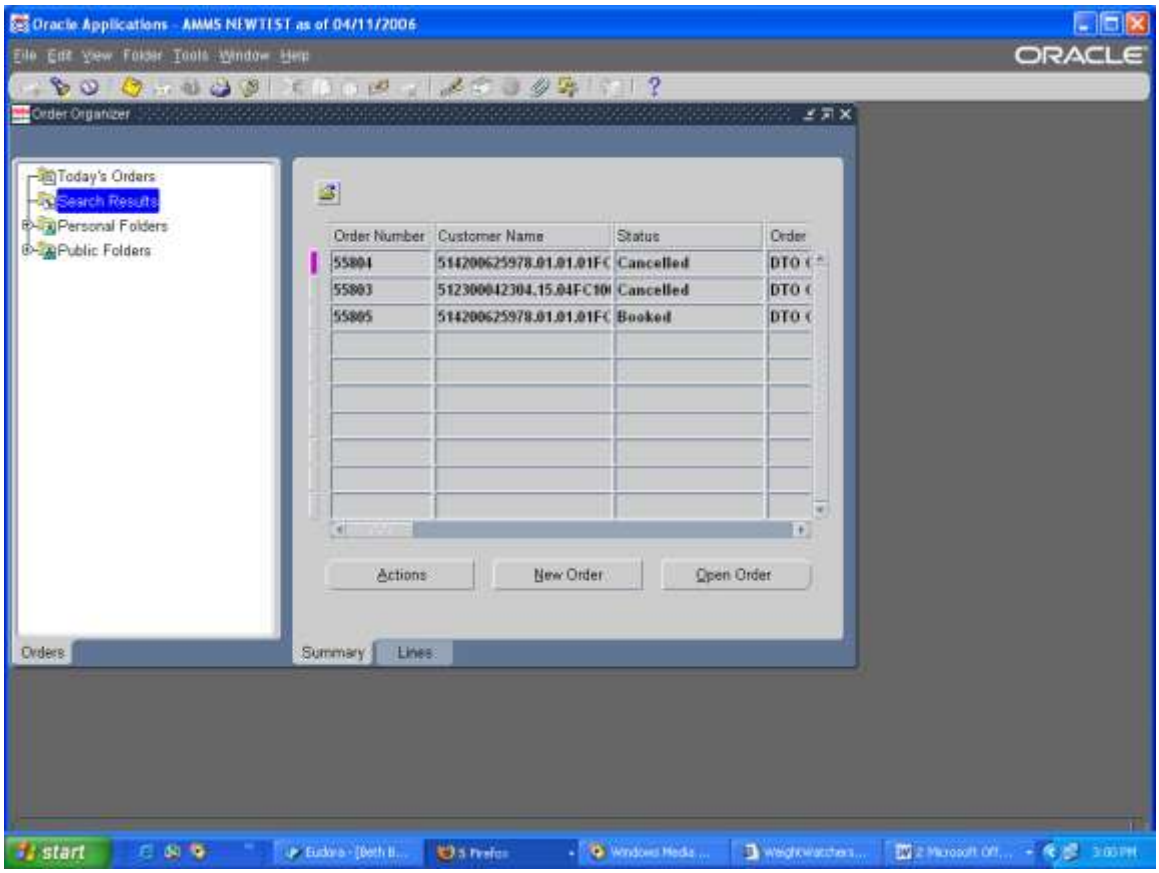


Step Description: Note window will tell you order has successfully been cancelled, click OK to the Note

Expected Results: Window will go away



Step Description: Re-Query order to see cancelled status



<u>PLEASE BE SURE TO ALSO CANCEL PURCHASE ORDER AND PURCHASE REQUISITIONS ASSOCIATED WITH SALES ORDER.</u>

AMMS TRAINING SCRIPT

CREATE EXPENSE SALES ORDER

Purpose

The purpose of this training script is to show users how to create a sales order for an "expense" item. This will only charge the customer there are no inventory transactions to be updated.

Audience

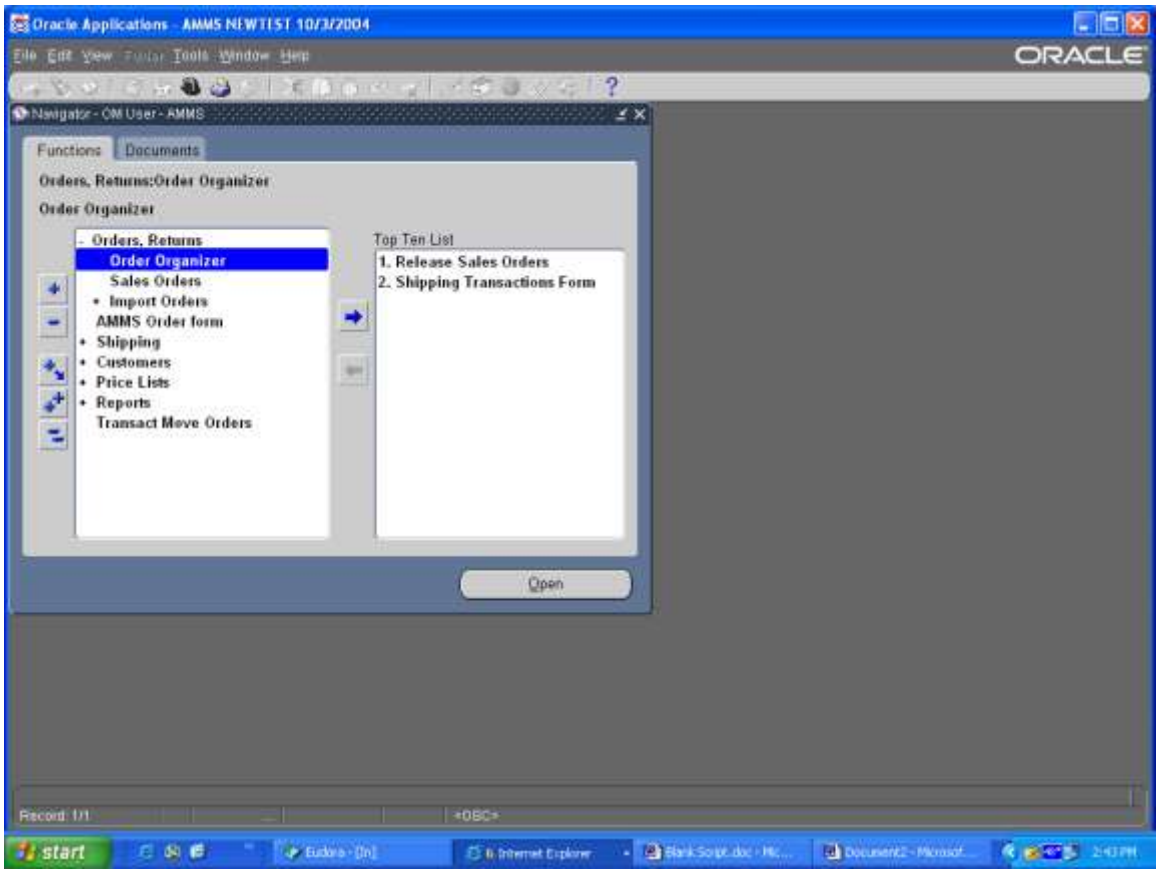
Material Coordinators and Supply Technician Leads

Prepared By	Theresa Coulson
Creation Date:	11/04/2004
Document Name	Create Expense Sales Orders.doc
Version	5
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Order Management.	

Step Description: Sign onto Oracle and Select the OM User responsibility.
Expected Results/Action: OM User Menu displayed

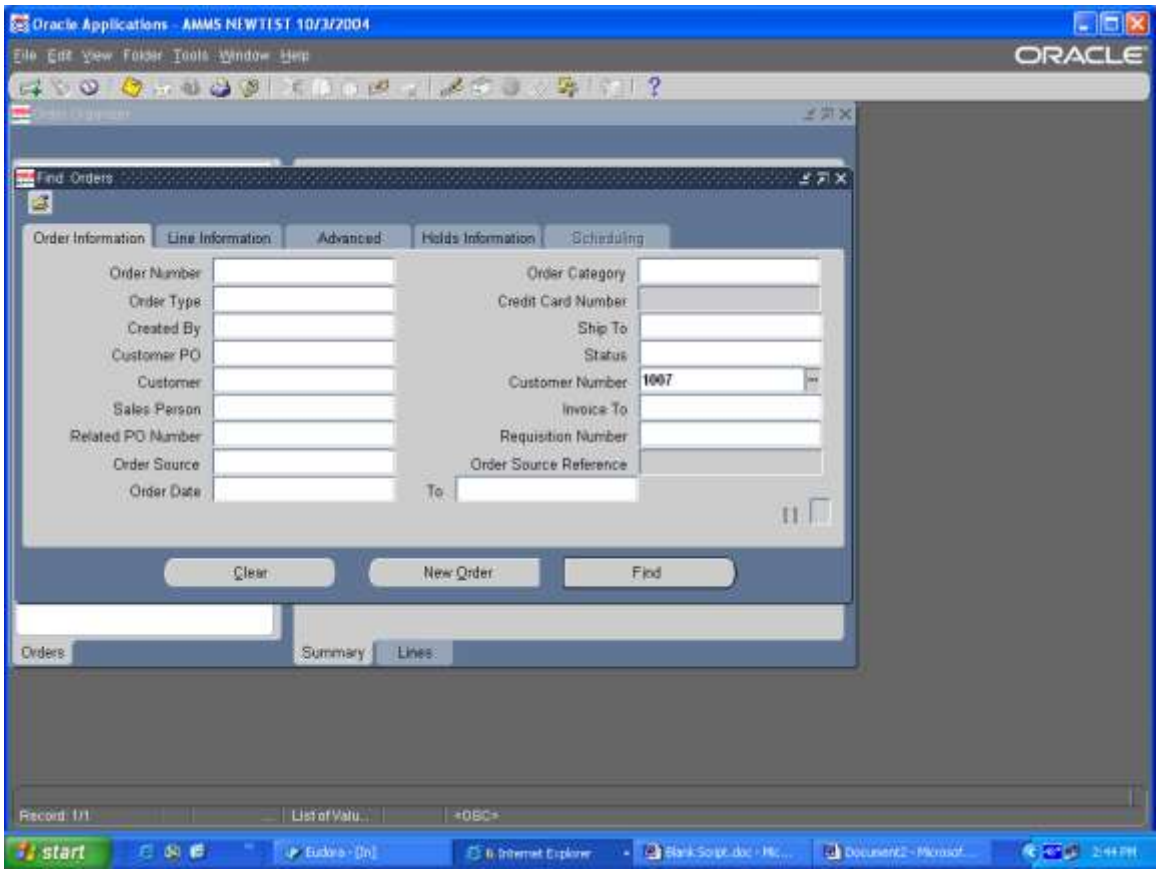
Step Description: Select Order Returns, Order Organizer and click on Open

Expected Results/Action: The Find Orders screen will appear



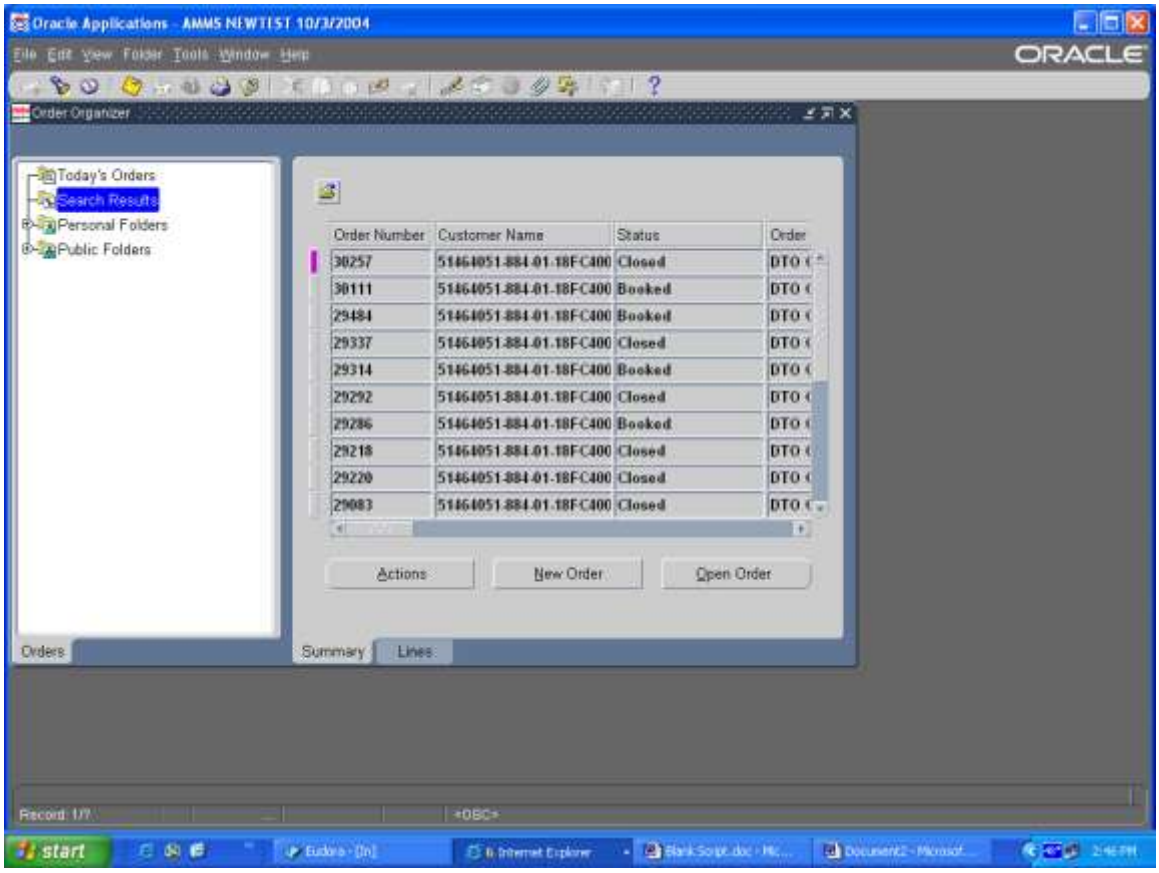
Step Description: Either enter a sales order number in the Order Number field or in the Customer Number field enter the unique customer number that is assigned to all WBS's. Click on the Find Button

Expected Results/Action: A list of sales order for this Customer Number will appear



Step Description: Select a sales order and click on the Open Button

Expected Results/Action: The sales order will open with all of the customer information

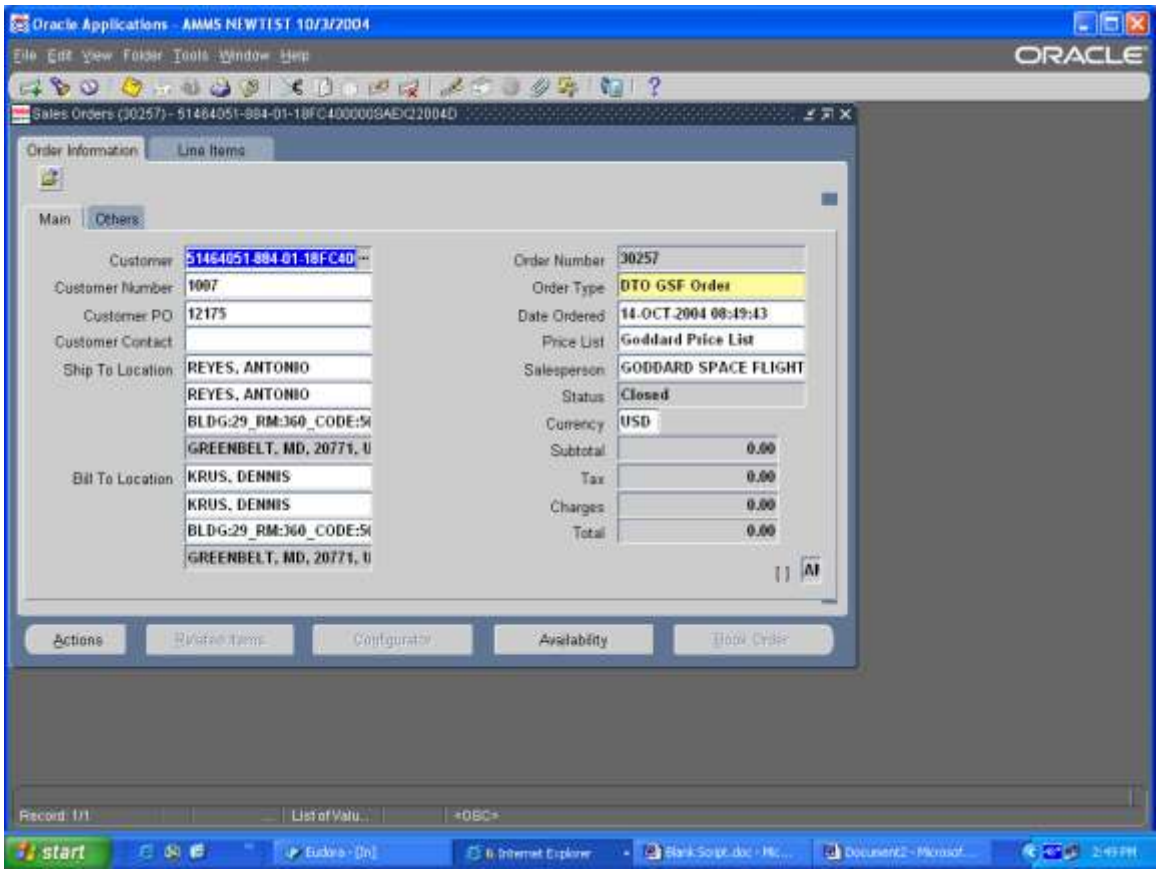


Step Description: At the Order Information tab verify the customer name as the customer that you are entering the new sales order. If this is not the correct customer information select a new sales order until you have the correct customer information, as there can be several ship to addresses for one WBS.

Expected Results/Actions: The correct customer will be displayed

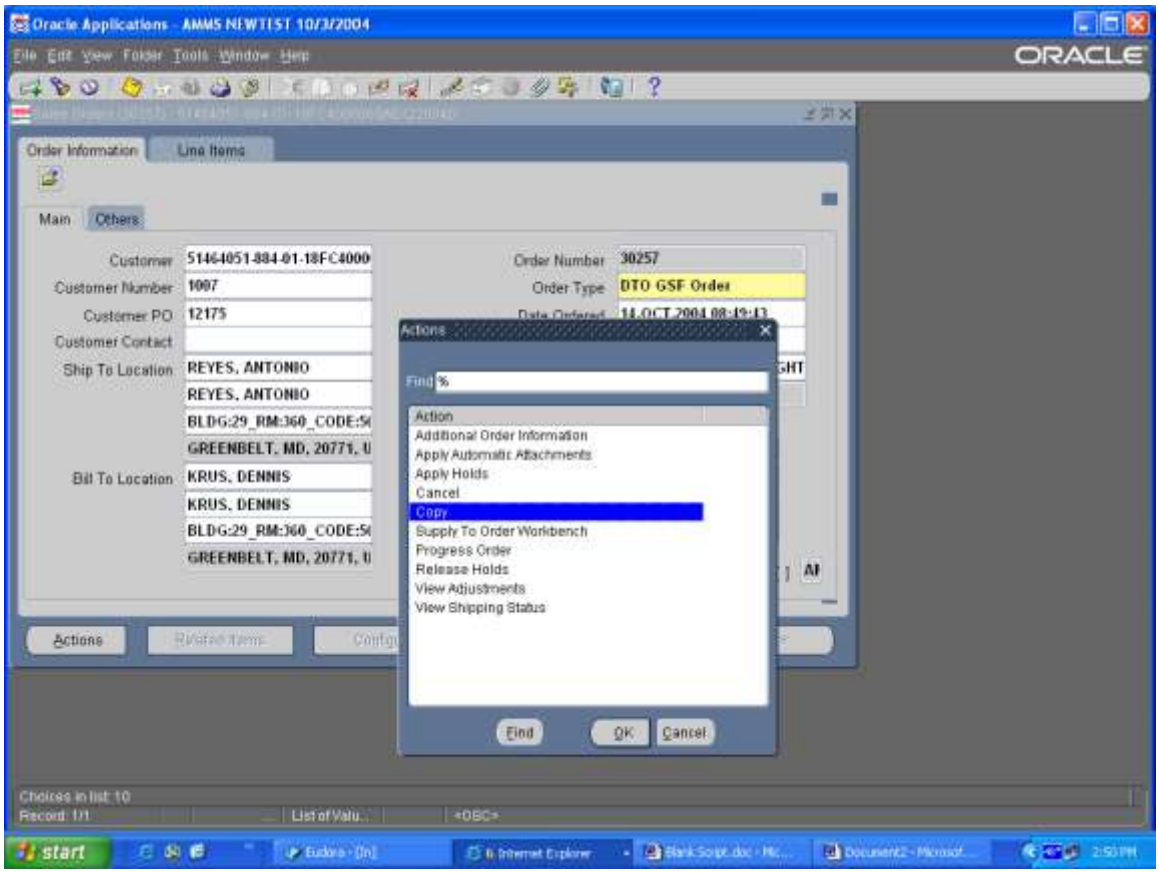
Step Description: Click on the Action Button at the bottom left of the page

Expected Results/Action: A menu will appear of Actions to choose from



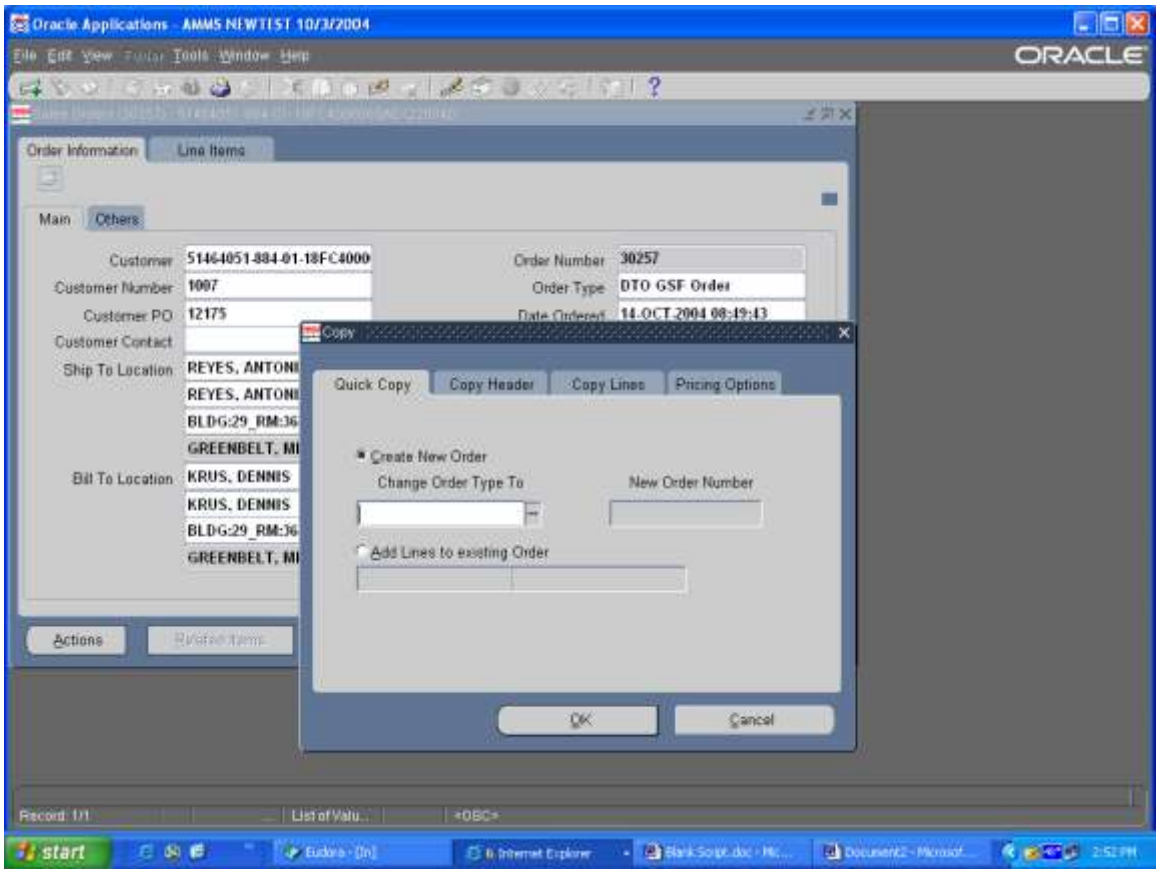
Step Description: From the list of Actions select Copy and click OK

Expected Results/Action: A Copy window will appear



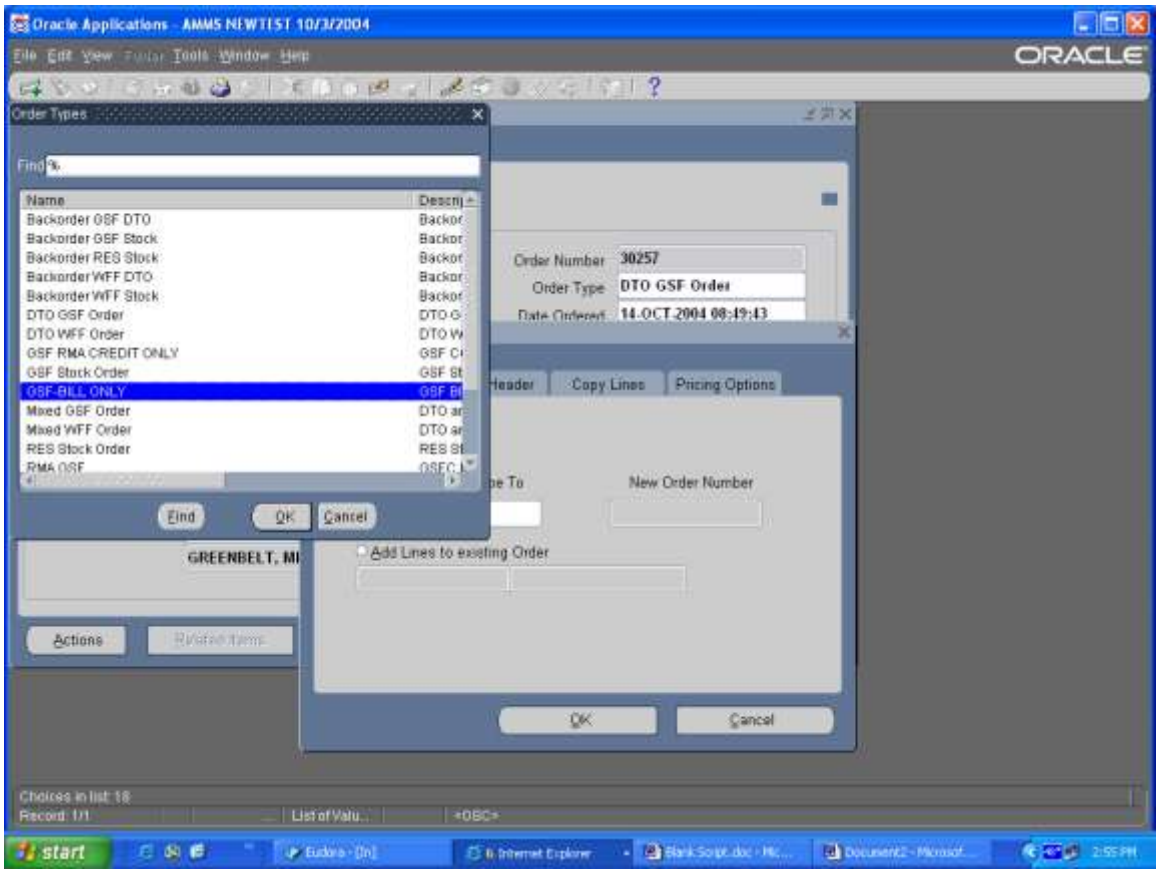
Step Description: At the Quick Copy Tab make sure the Create New Order bubble is marked, click in the Change Order Type to Field and click on the List of Values (LOV)

Expected Results/Actions: A list of Order Types window will appear



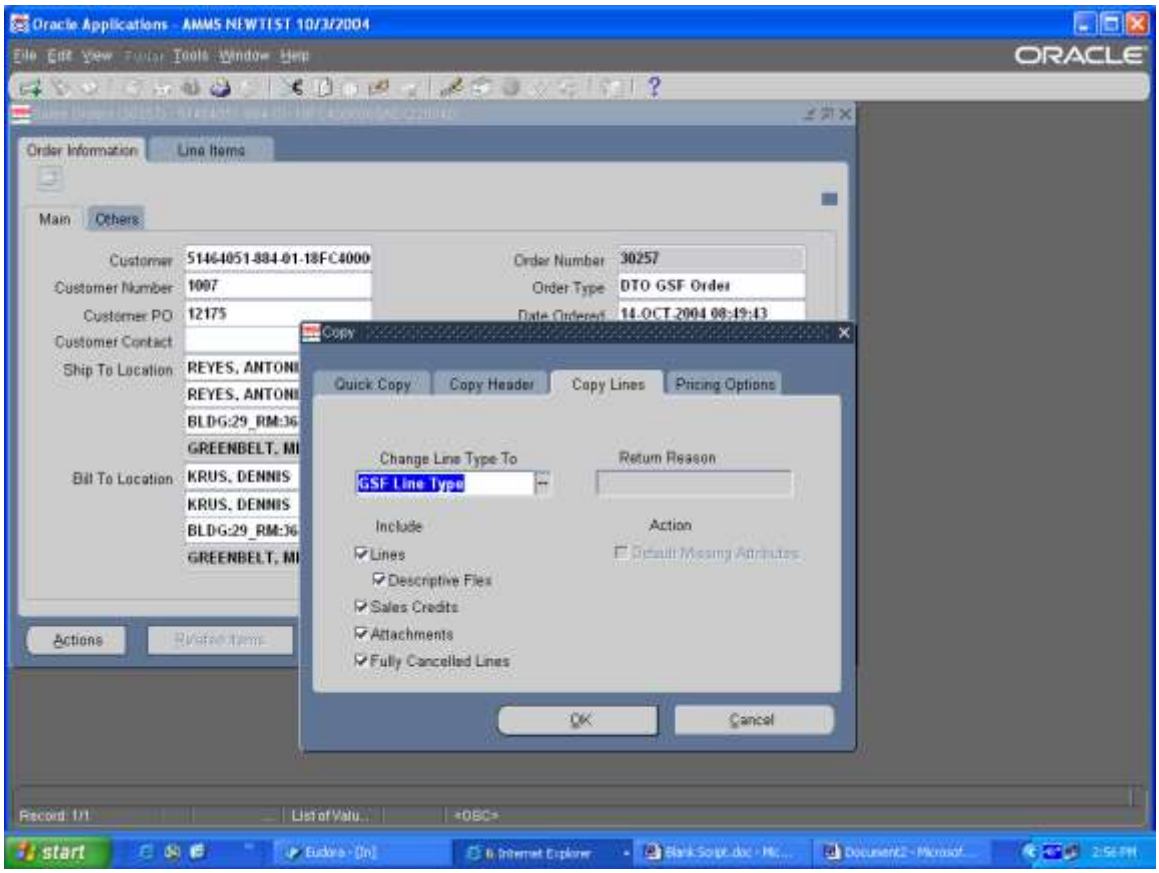
Step Description: Select the appropriate Bill Only (Expense) order type and click OK

Expected Results/Actions: You will return to the Copy window and go to the Copy Header Tab



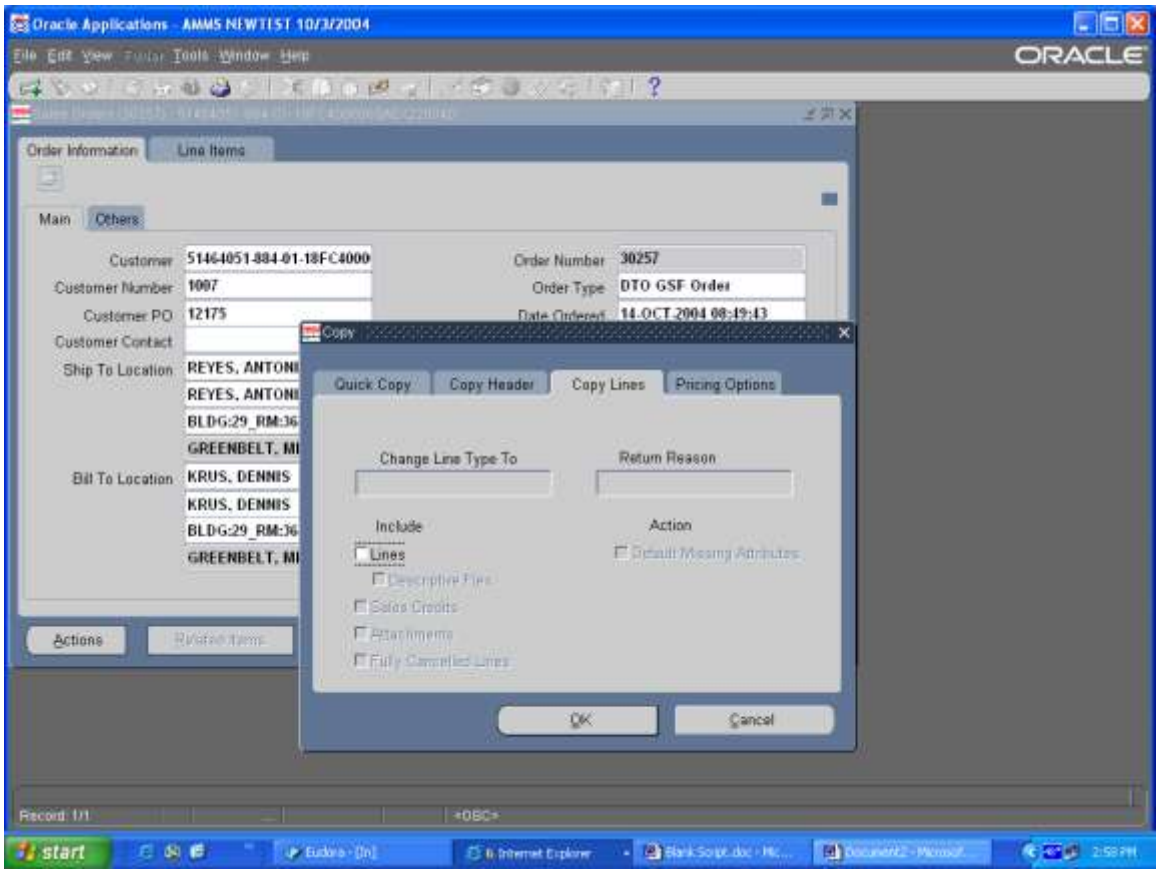
Step Description: Click on the Copy Line tab and under the Include field un-check the Lines.

Expected Results/Actions: All of the check marks will go away and become gray



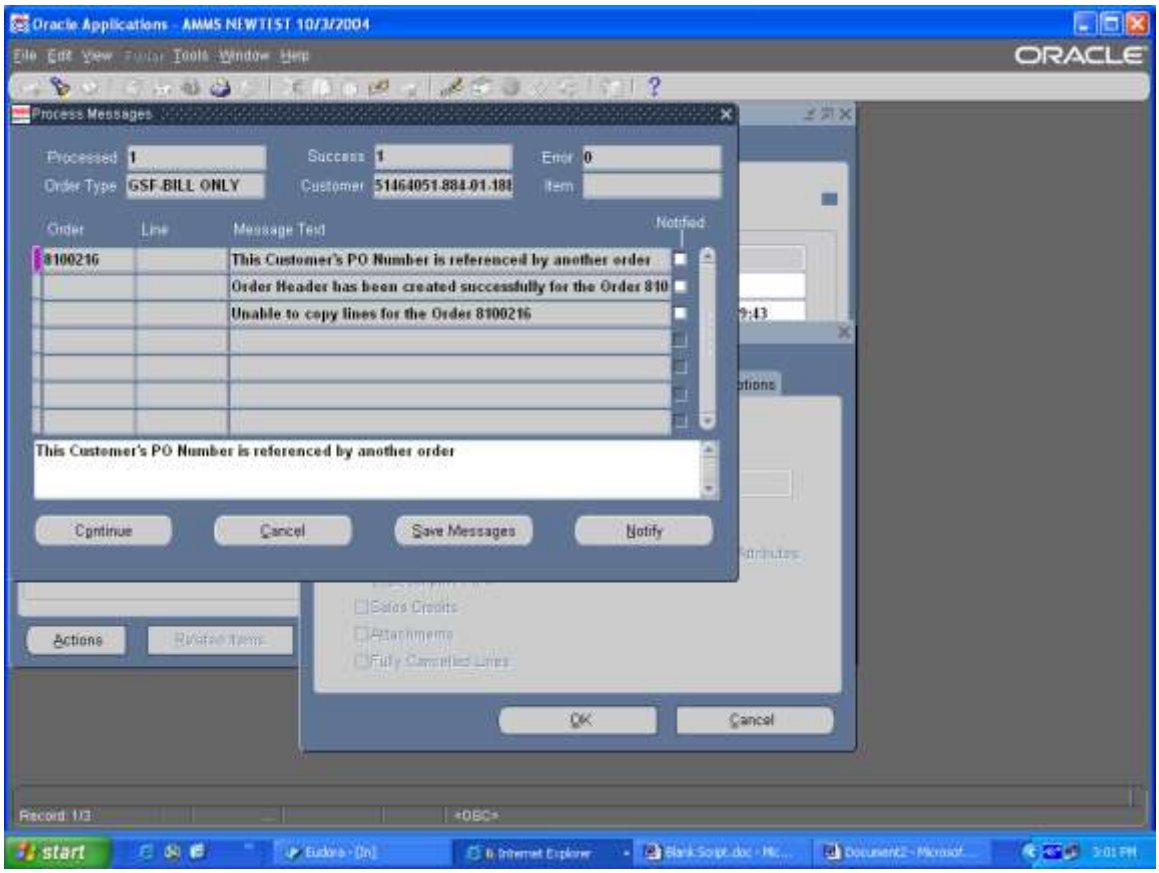
Step Description: Click the OK on the Copy Window

Expected Results/Actions: A Process Message Window will appear



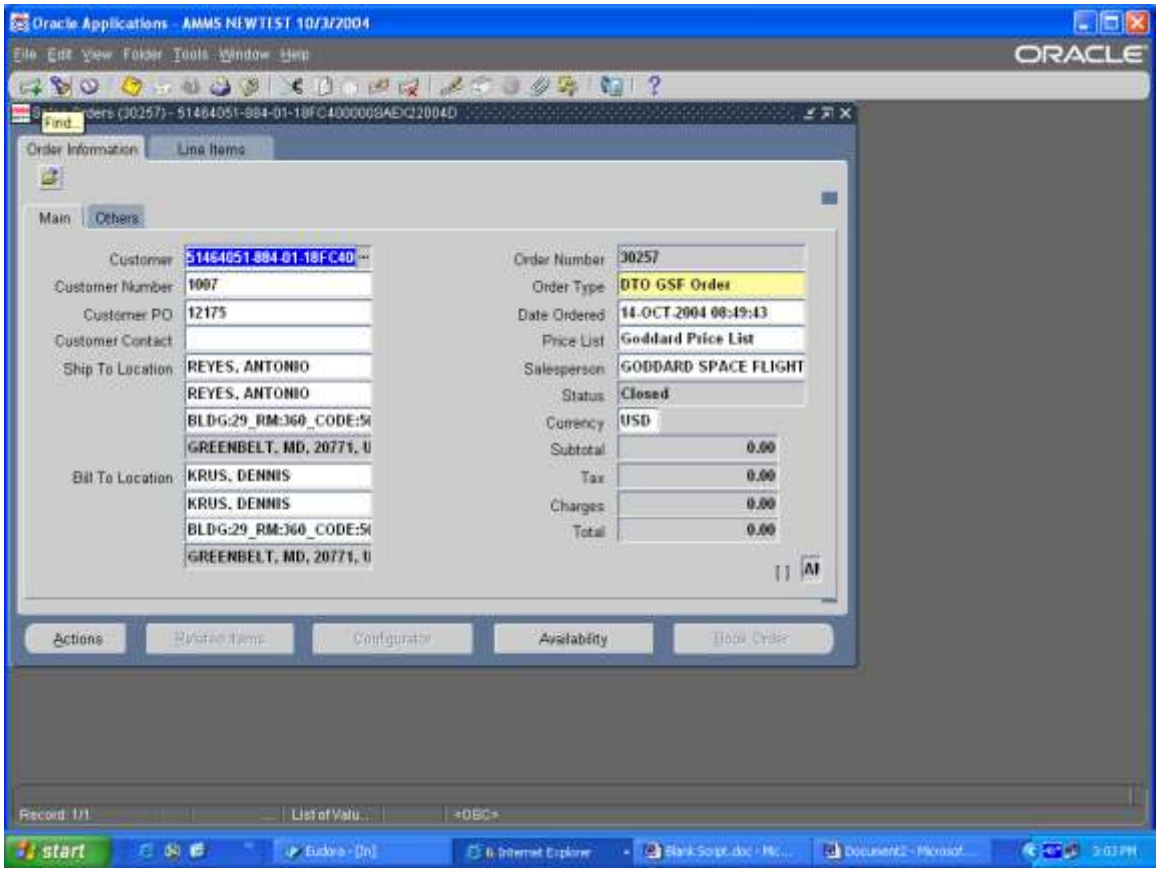
Step Description: This window tells you the new Sales Order Number that has been assigned to your Bill only order, write down this number. It will tell you that the order was created successfully, and it was unable to copy lines. This is fine; we didn't want the lines copied. Click on the Continue Button at the bottom left of the Process Message Window.

Expected Results/Actions: You go back to the original Order Information Screen



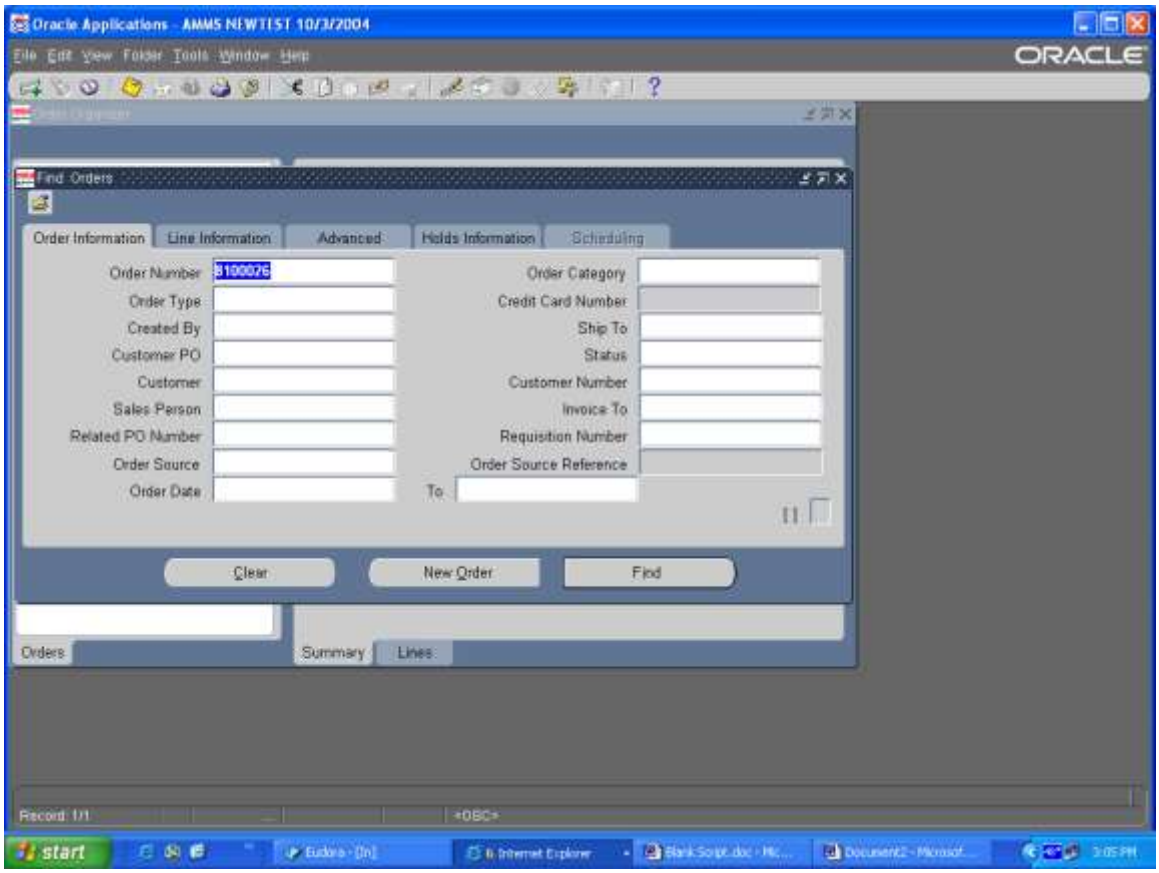
Step Description: Click on the Flashlight on the toolbar to refresh your screen.

Expected Results: The Find Order Screen will appear



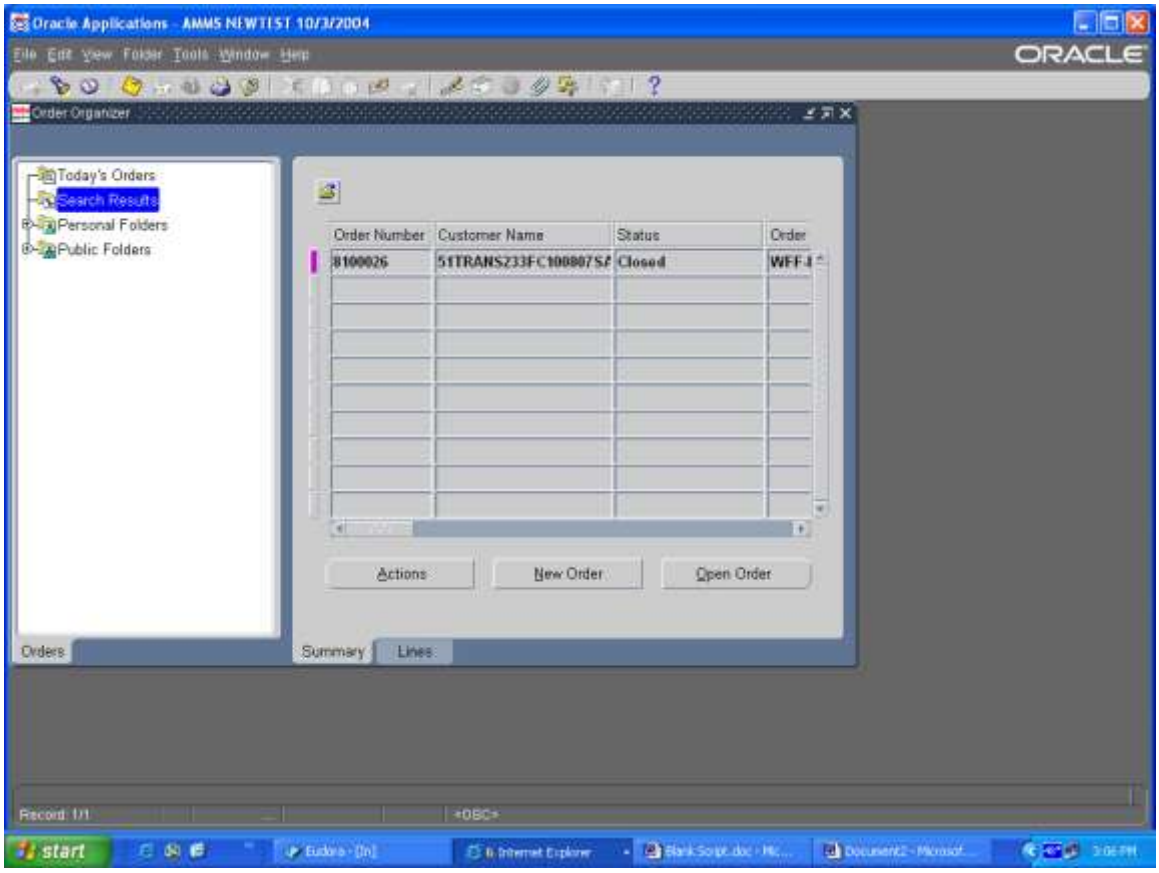
Step Description: Click on the Clear Button at the bottom left of your screen. Enter the new Sales Order number that was created when you copied to the Bill Only type, click on the Find Button.

Expected Results/Actions: The order Organizer screen will appear



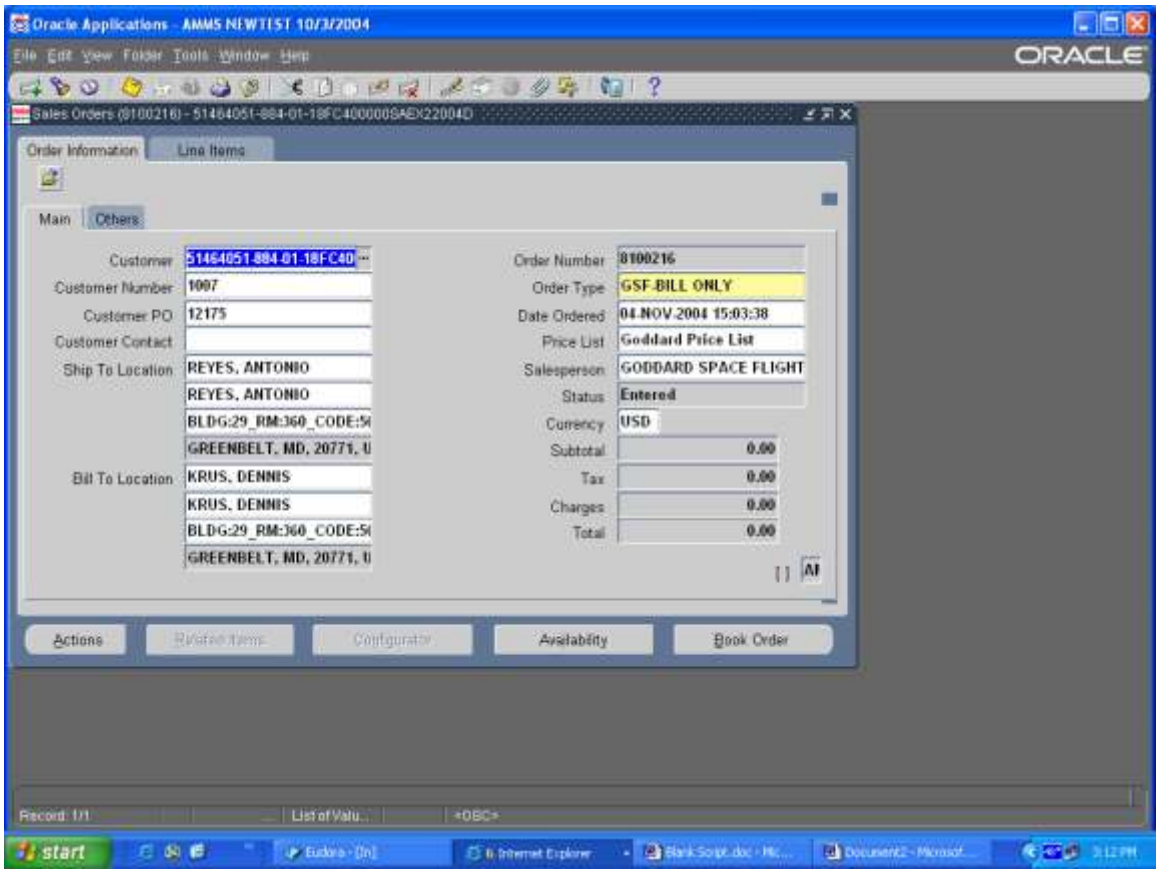
Step Description: Click on the Open Button at the bottom right of the screen

Expected Results/Actions: The Sales Order will open at the Order Information Tab



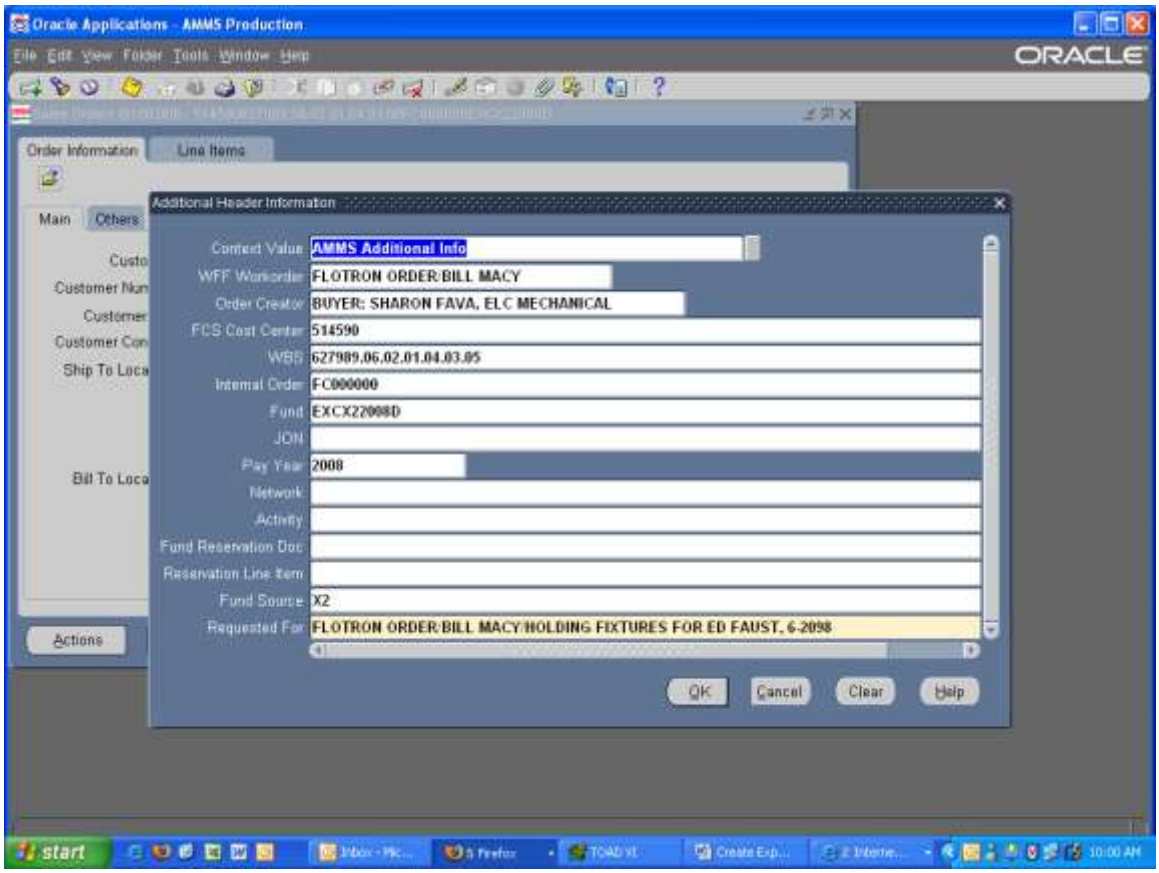
Step Description: Verify that this is the correct Bill Only Sales Order, verify all of the information. Click in the Descriptive Flex Field at the bottom right of the window, [ ].

Expected Results/Actions: Additional Header Information window will appear



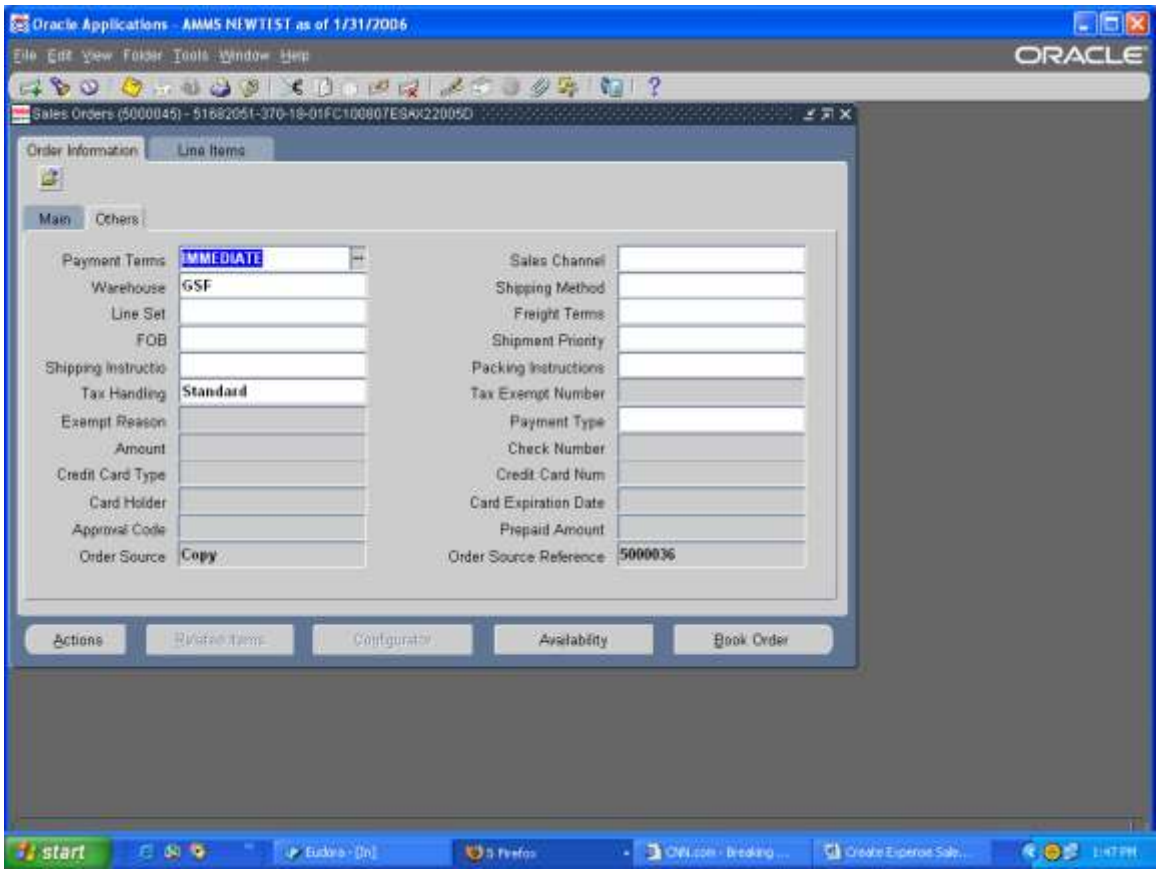
Step Description: In the Requested For field enter who the order is for. You can also enter informatin in the WFF Workorder field and the Order Creator field. Click OK

Expected Results: Name will change in Order Creator, window will close



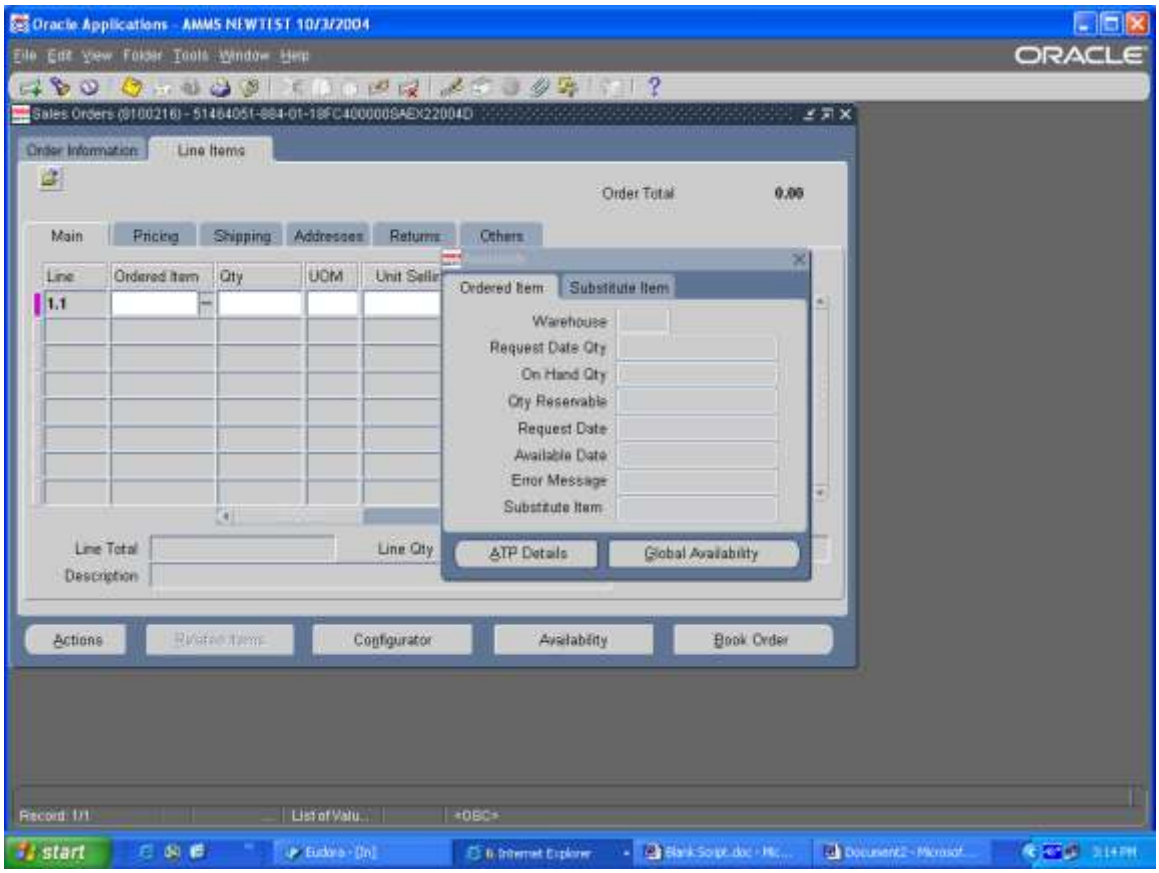
Step Description: Click on the Line Items Tab

Expected Results: Order Line Item Information will appear



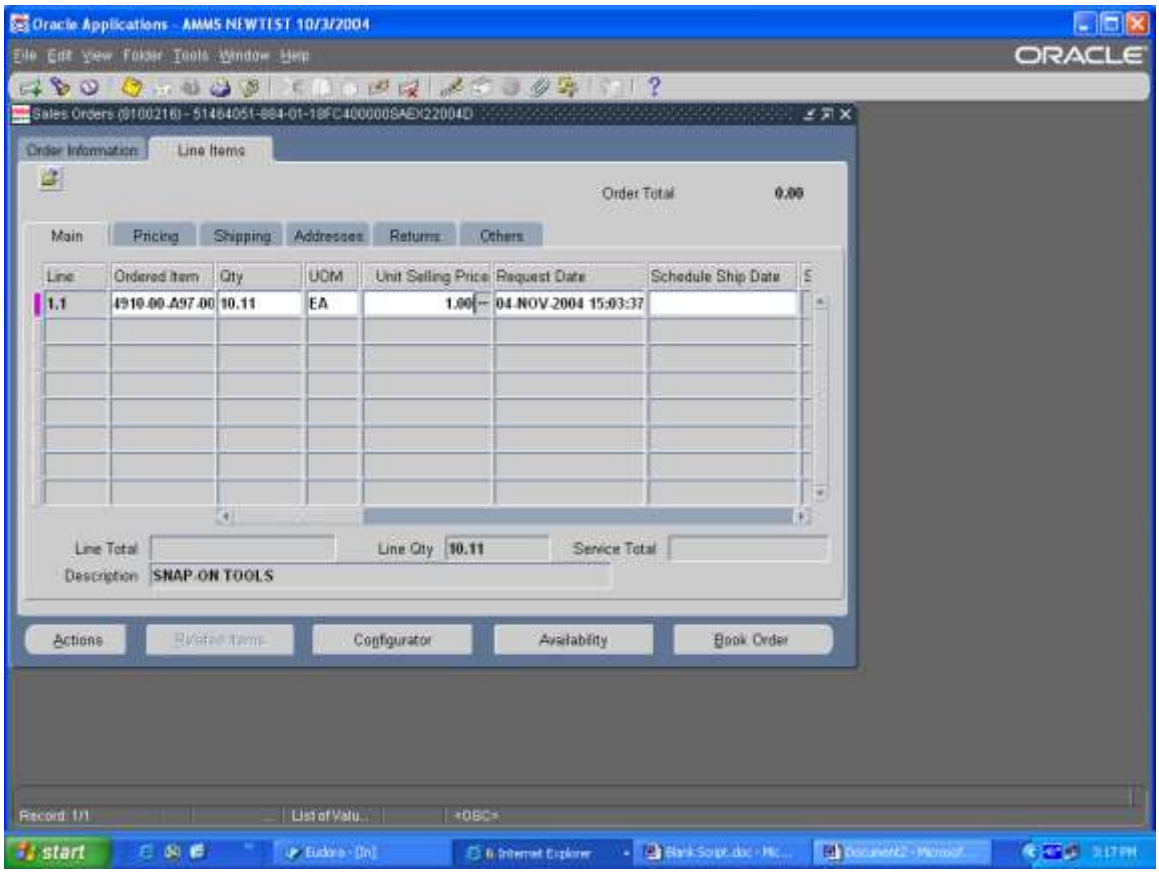
Step Description: Close the Availabilities Window

Expected Results/Actions: The Availabilities window will go away



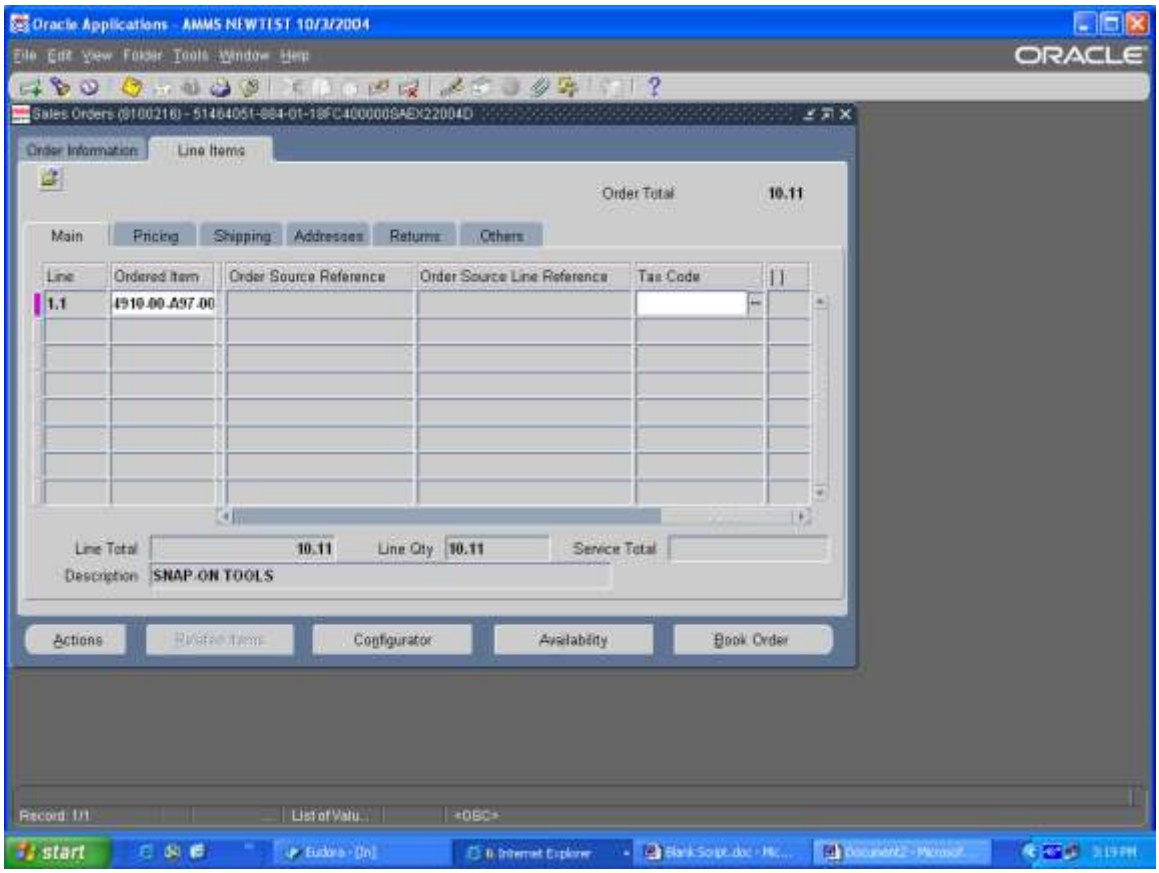
Step Description: In the Ordered Item Field enter the Item Number (stock number), tab to the Qty field, for Expense order we enter the cost as the qty, so if the cost is $10.11 the qty will be entered as 10.11, tab to the Unit Selling Price, this field will be 1.00.

Expected Results: All of the fields will have data



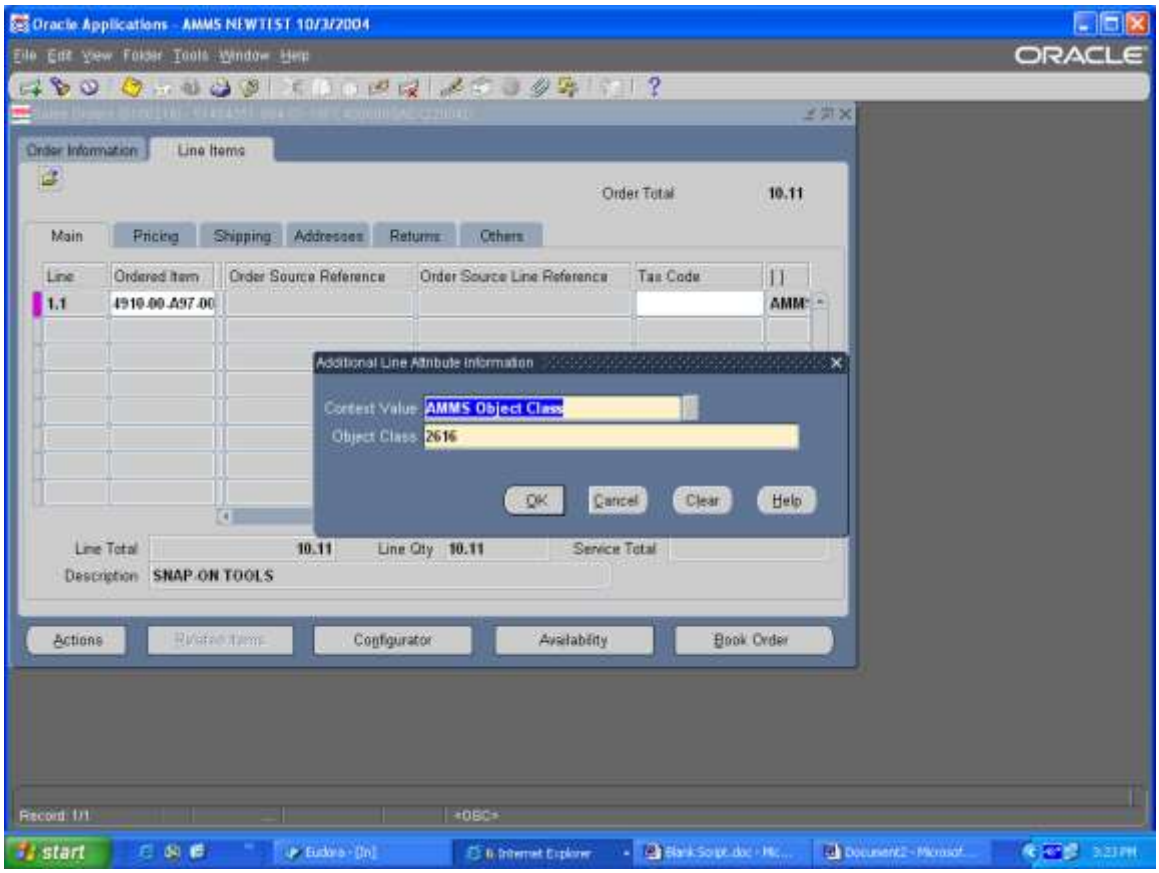
Step Description: Use the Scroll bar at the bottom of the window and go all the way to the end of the Main Tab until you see [ ]. This is a Descriptive Flex Field (DFF), click in that gray blank field

Expected Results/Actions: The Additional Line Attribute Information window will appear



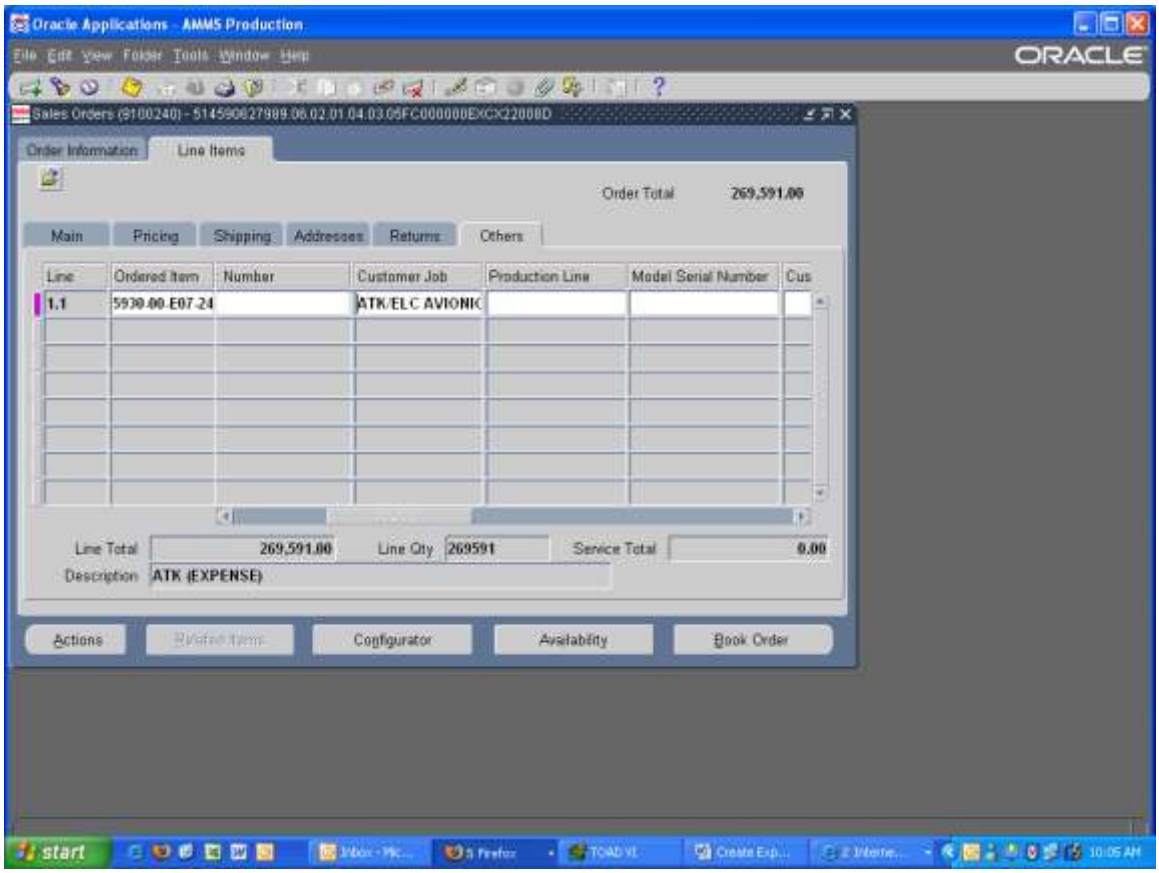
Step Description: Select the Object Class field and click in there. Enter the correct Object Class. The first 2 numbers of the Item Number determine the Object Class. If you are unsure of what the Object Class is please ask Theresa Coulson or Kathy Schultz. Once you enter the object class click the OK Button

Expected Results/Actions: You will go back to the Line Items window at the Pricing Tab



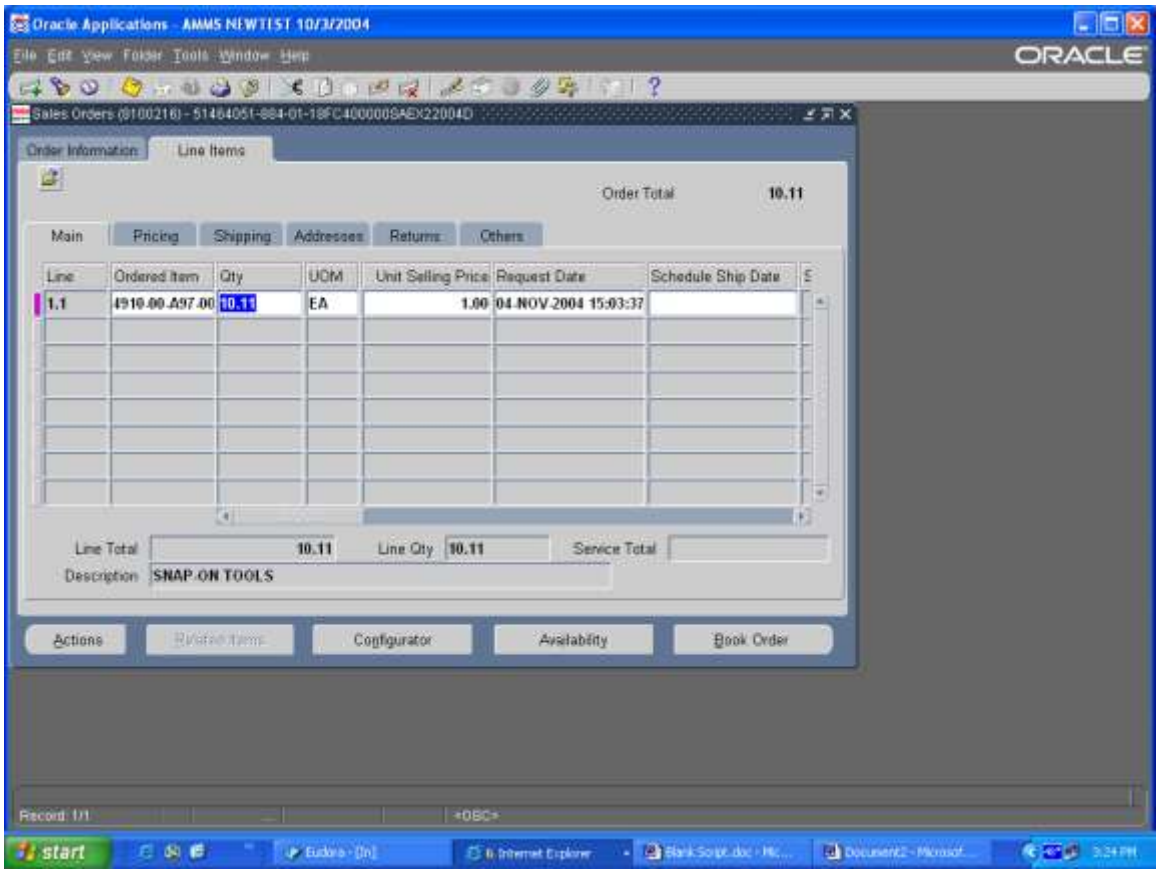
Step Description: Click on the Other tab, scroll to the right until you see the Customer Job field. This is a free form field, enter the Project Name and the PO number

Expected Results: Field will be populated



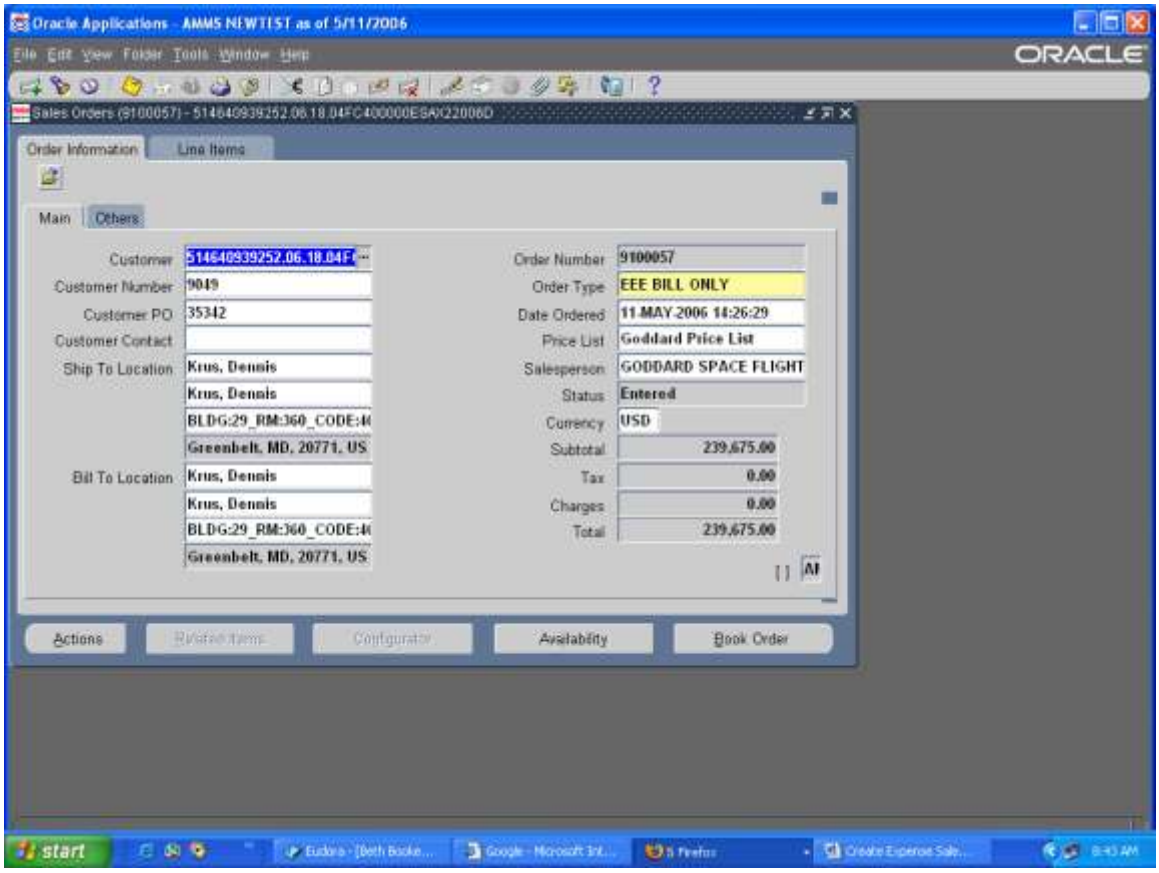
Step Description: Once you verify that all of the information is correct Save your work. **<u>DO NOT BOOK THE ORDER</u>**

Expected Results/Actions: A Note will appear telling you Transactions Saved and Applied



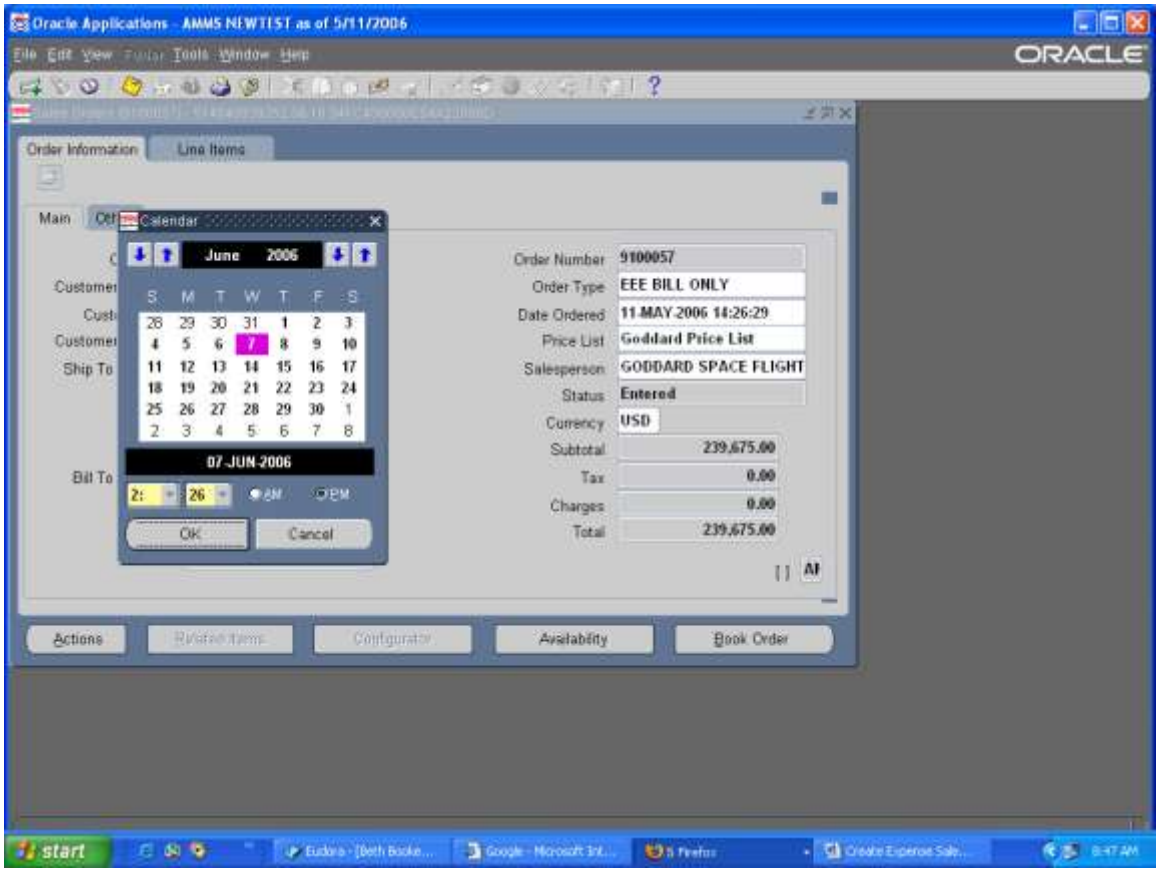
Step Description: The Order Status will remain Entered, until Accounting notifies you that the invoice is received.

Expected Results: Order status will be Entered.

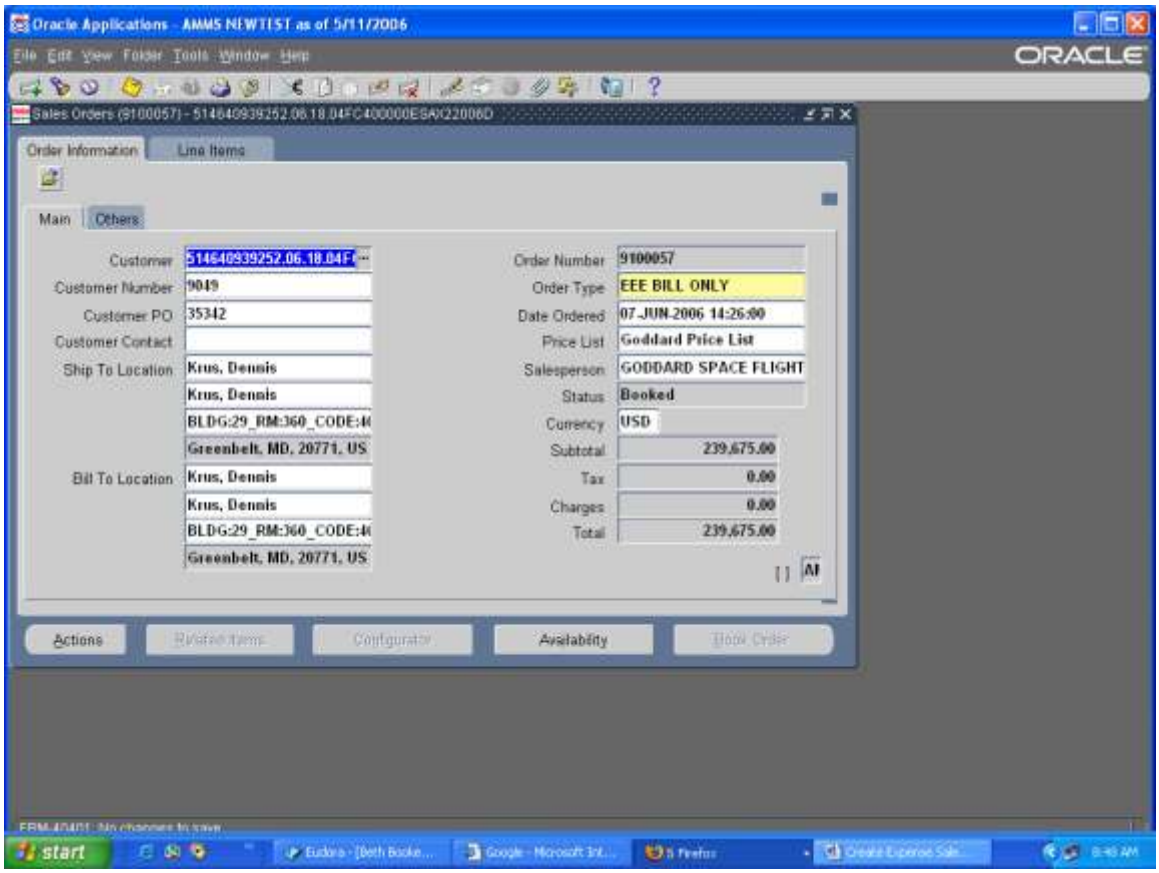


Step Description: When Accounting gets the invoice for the item you can make changes to the "cost", then you **MUST** change the Date Ordered, to do this click in the Date Ordered field and either enter that days date or click on the LOV and select the date from the calendar. Book the order. If in the case of Furniture, where we are invoiced several times for the items and installation, you change the cost Book the order, then enter another Expense Sales Order for the cost difference.

Expected Results: Date Ordered will change and Order Status will change to Booked



Step Description: Order is now complete.



AMMS TRAINING SCRIPT

Processing a "Walk Thru"

Purpose

The purpose of this training script is to provide instructions to process a customers order that is Urgent

Audience

Material Coordinators and Supply Technician Leads

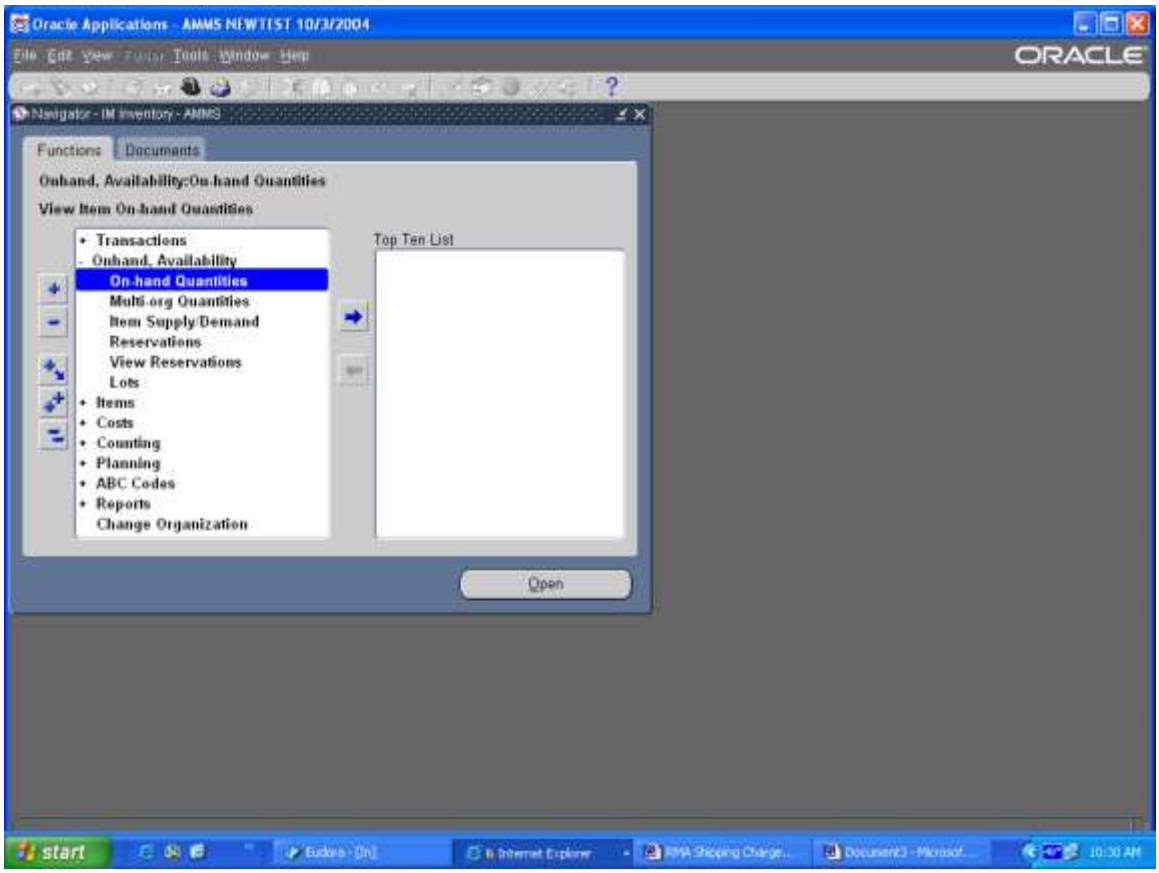
Prepared By	Theresa Coulson
Creation Date:	04/07/2005
Document Name	EEE Urgent Order Process.doc
Version	2
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Order Management.	

Step Description: Sign onto Oracle and select the IM Inventory AMMS Responsibility

Expected Results/Actions: The IM Inventory Main Menu will appear

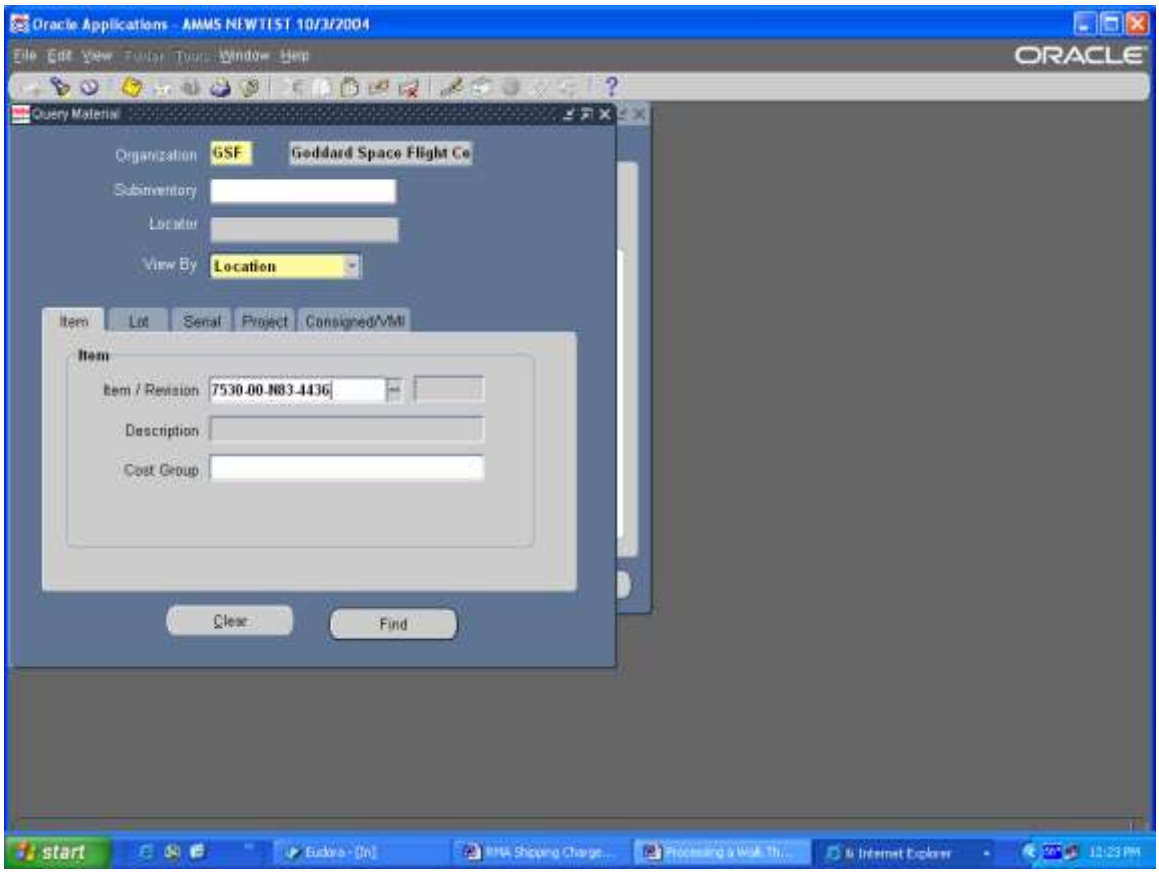
Step Description: Select On Hand Availability > On Hand Quantities, and select the appropriate Organization (GSF or WFF)

Expected Results: The Query Material form will appear



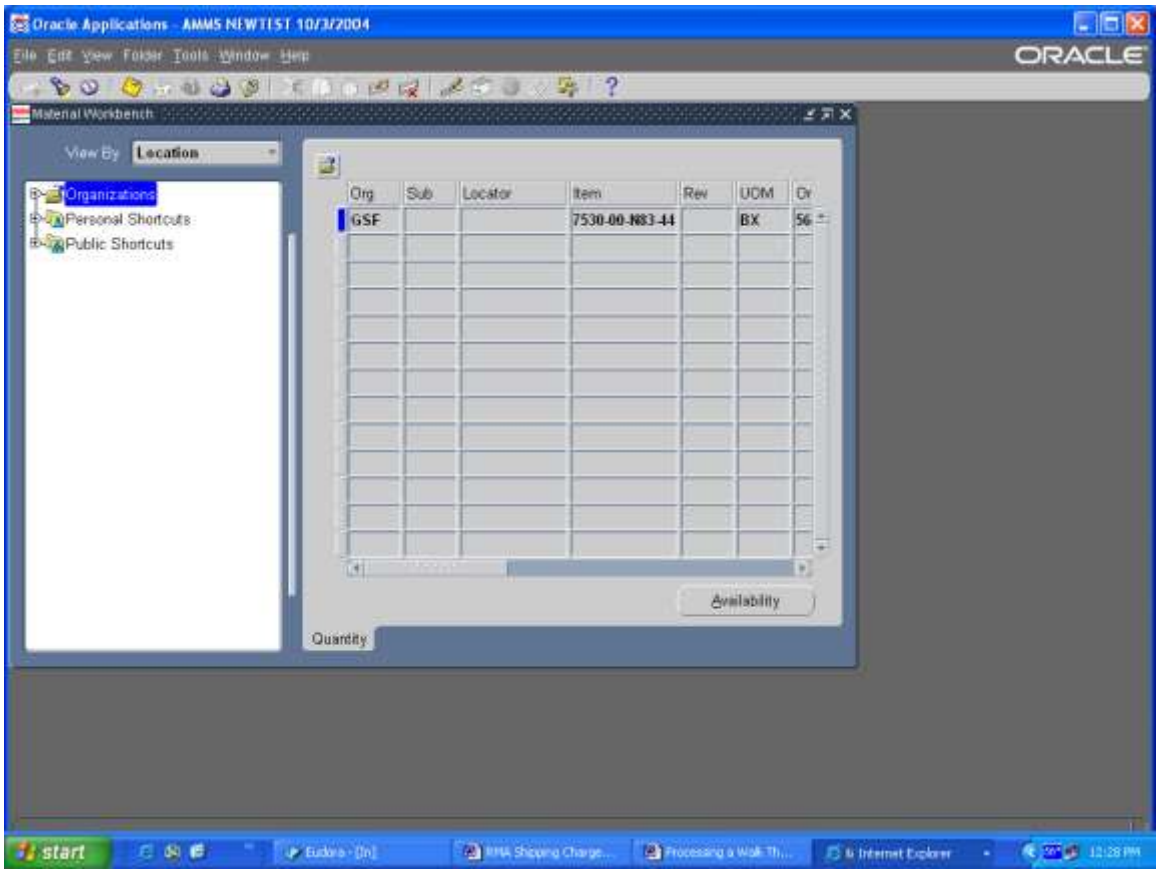
Step Description: Enter the Item Number (stock number) in the Item / Revision field and click on the Find Button.

Expected Results/Actions: The field is populated and the Material Workbench form opens



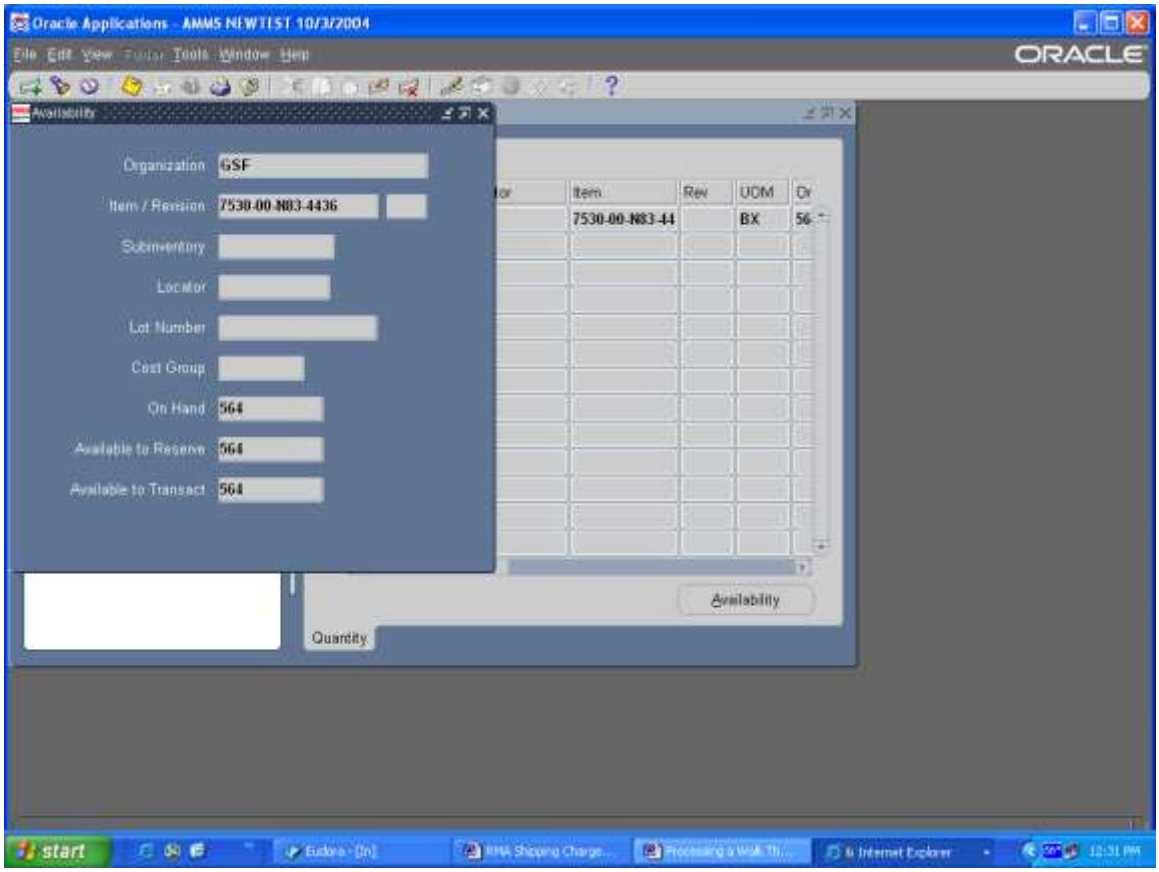
Step Description: Click on the Availability Button at the bottom right of the screen

Expected Results: The Availability Window will appear



Step Description: Look at the Availability Window this will tell you how many you have On Hand, Available to Reserve, and Available to Transact.

Expected Results/Actions: You are verifying that the qty that is needed by the customer is available



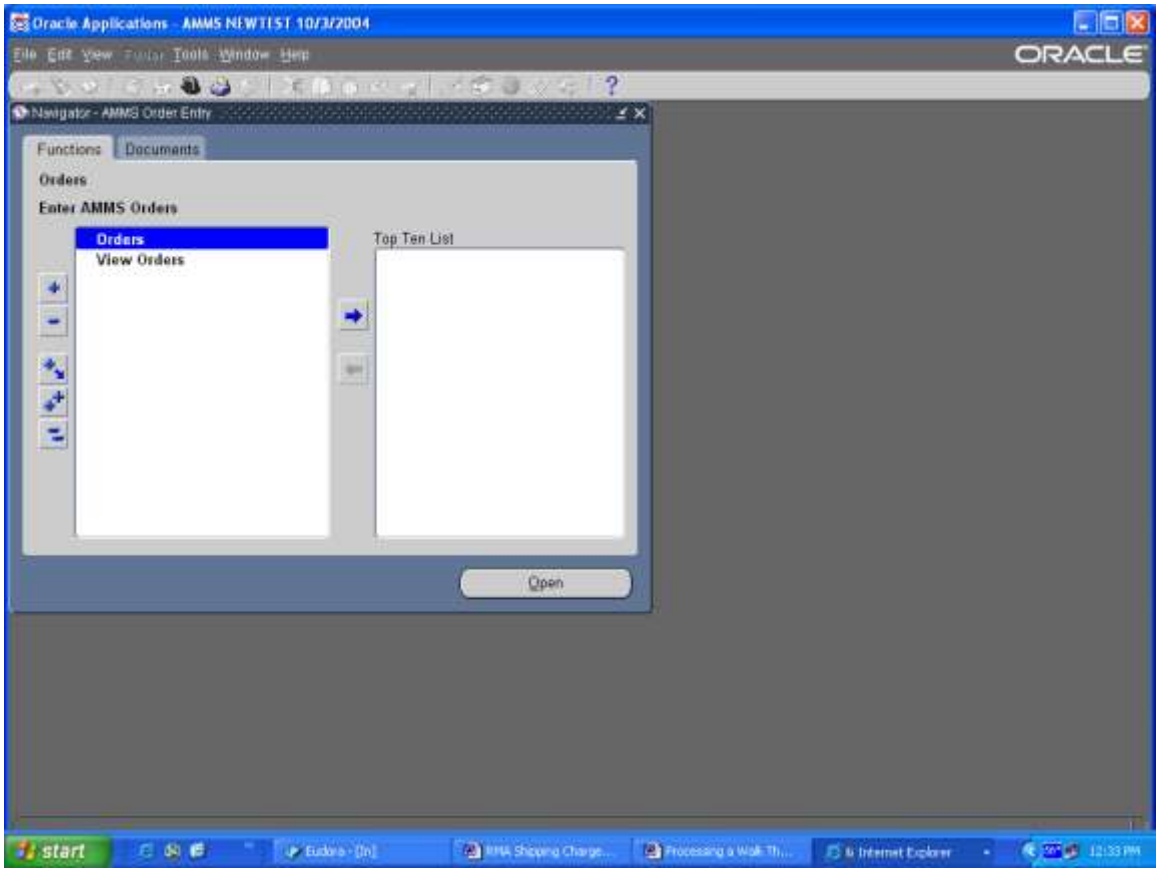
If you have qty available you can continue and process the Walk Thu.

Step Description: Close all windows and change responsibilities to AMMS Order Entry

Expected Results/Actions: The AMMS Order Entry main menu will appear

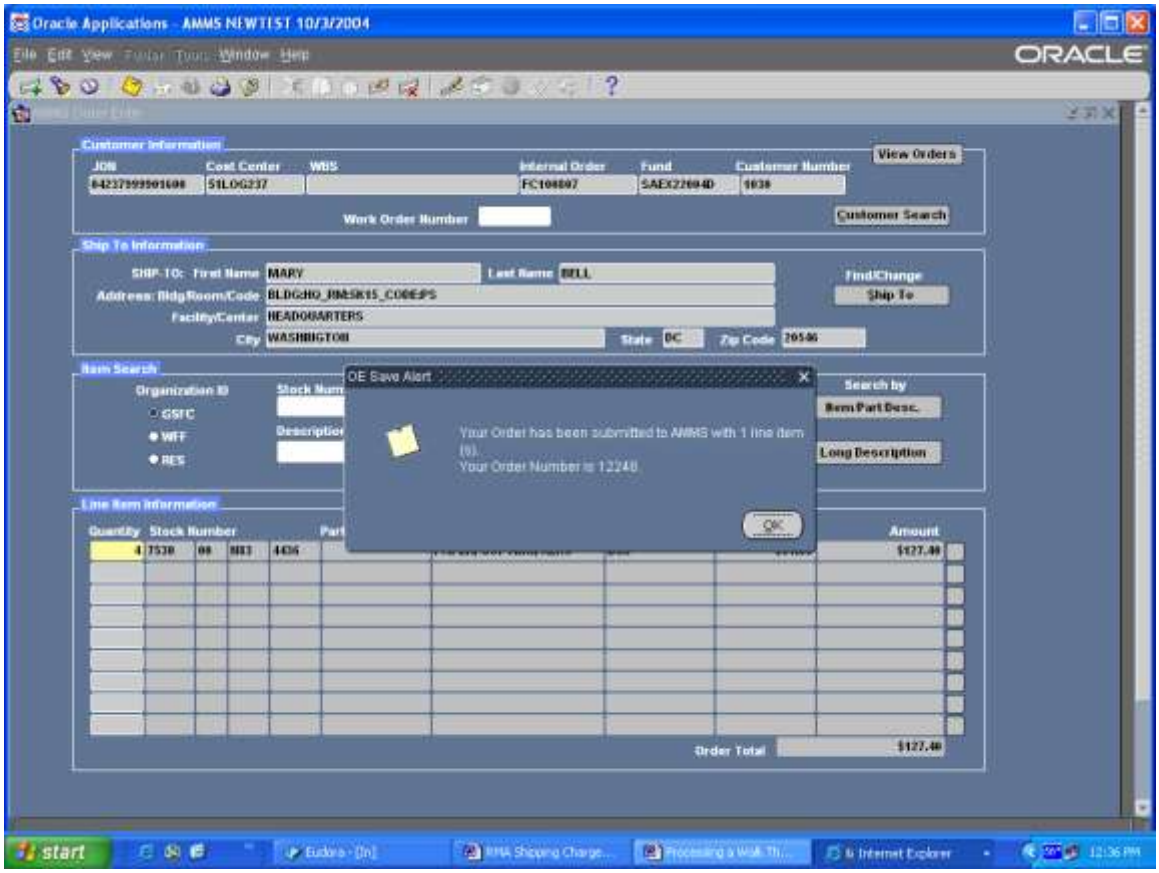
Step Description: From the AMMS Order Entry main menu select Orders and click on the Open button

Expected Results/Actions: The AMMS Order Entry Screen will appear



Step Description: Enter the customer WBS/JON information, follow all steps for entering the customers order and save the transactions.

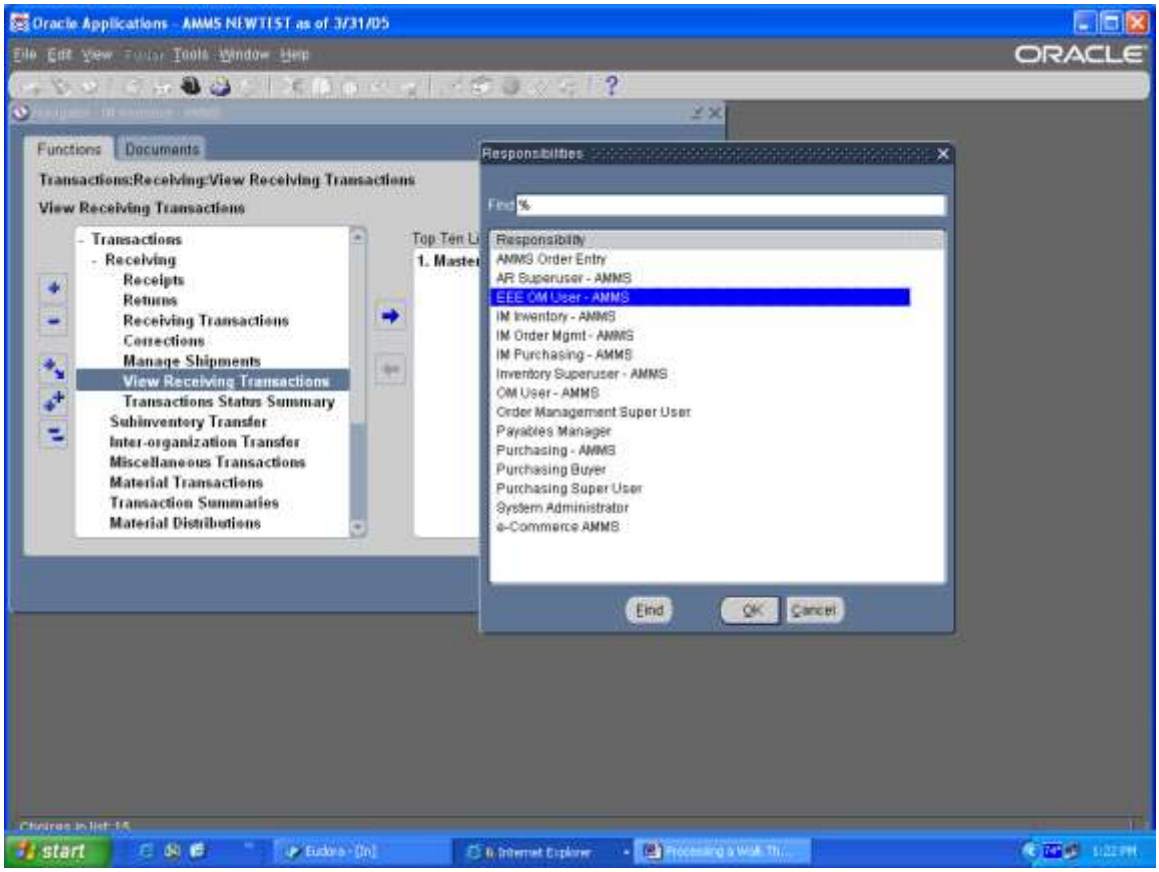
Expected Results/Actions: You will receive an OE Save Alert with your Order Number, write this order number on the walk thru paperwork, you will needed if for future reference.



Once you have saved the order contact Theresa Coulson, Order Import needs to be run, and NO ONE other than a system person should run this job. Theresa Coulson will run Order Import and tell you when it has completed.

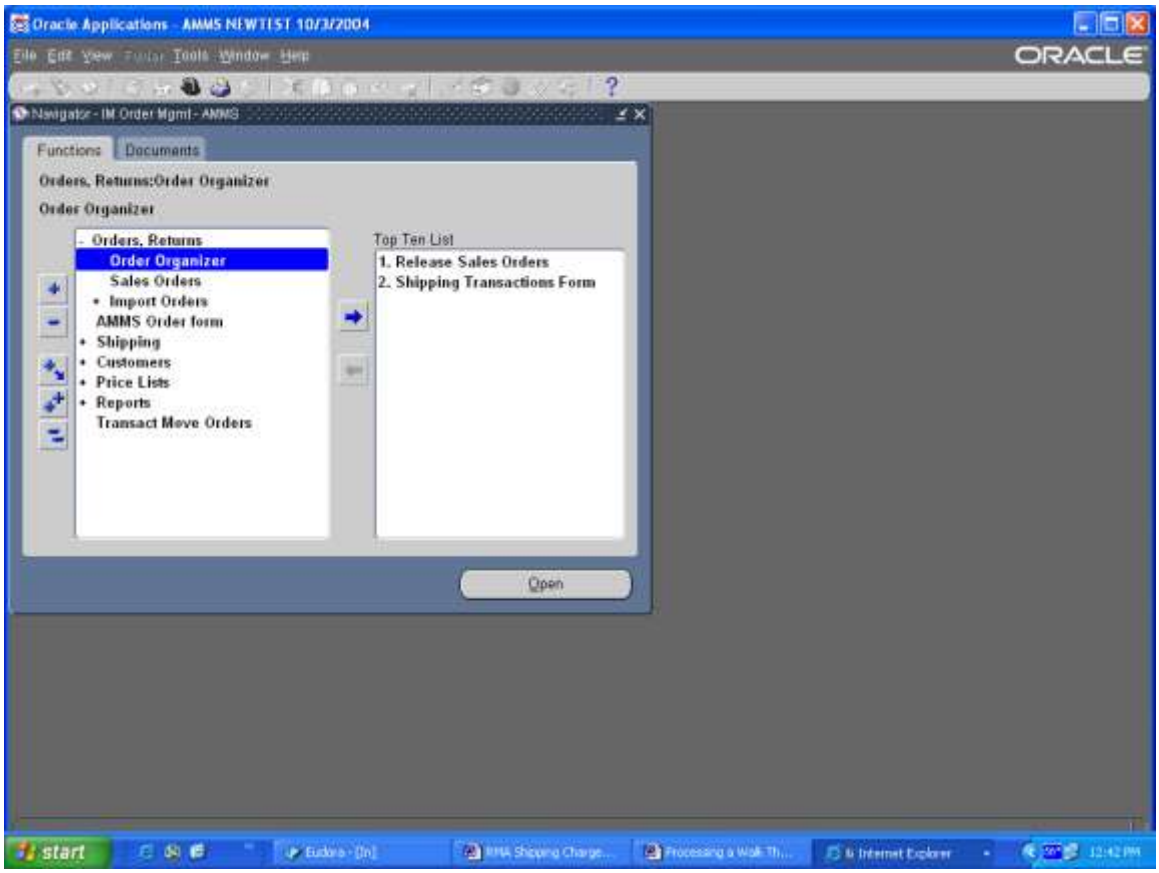
Step Description: Once Order Import has completed change responsibilities to EEE OM User AMMS, this is the responsibility to use ONLY when processing a Urgent Order for Project Parts

Expected Results/Actions: The OM User AMMS main menu will appear



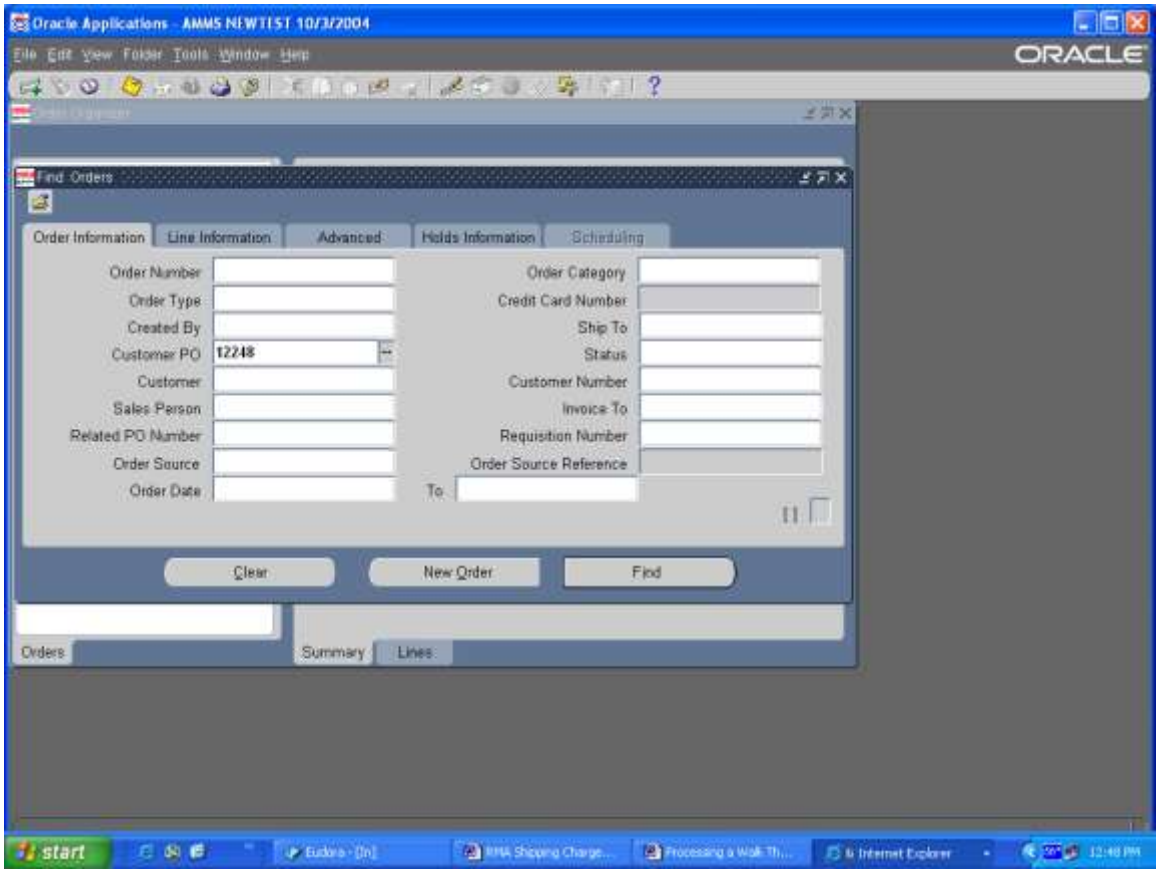
Step Description: Open up Order Returns > Order Organizer

Expected Results/Actions: The Find Orders screen will appear



Step Description: In the Customer PO field enter the Order Number that you received when you saved entering the customers order, click on the Find button.

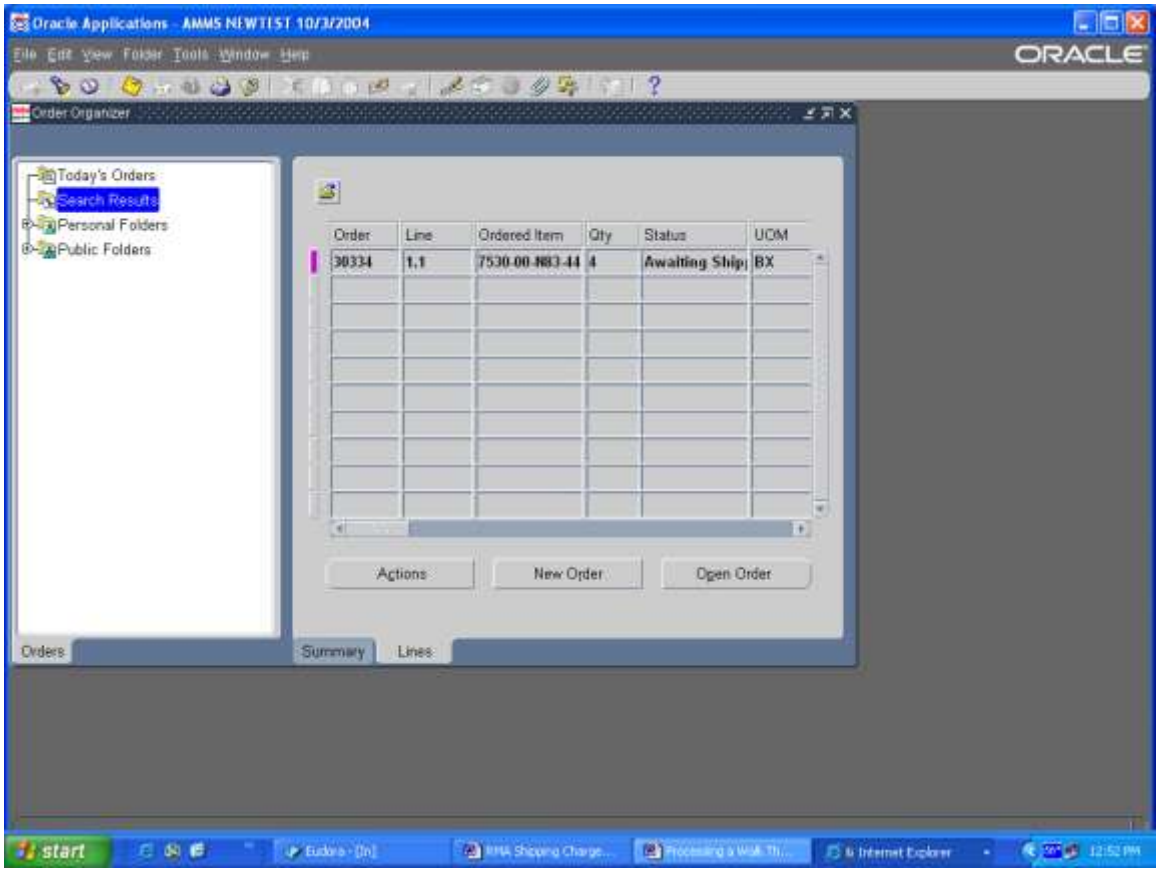
Expected Results/Actions: The Order Organizer screen will appear



Step Description: Write Down the Order Number you will need this for future transactions. Click on the Lines Tab at the bottom of the screen and see if the order status is Awaiting Shipping, this means that the order is ready to be pick released.

Expected Results/Actions: You will see a screen with the order number, the item number the item status, and the qty. This tells you that your order is ready for pick release.

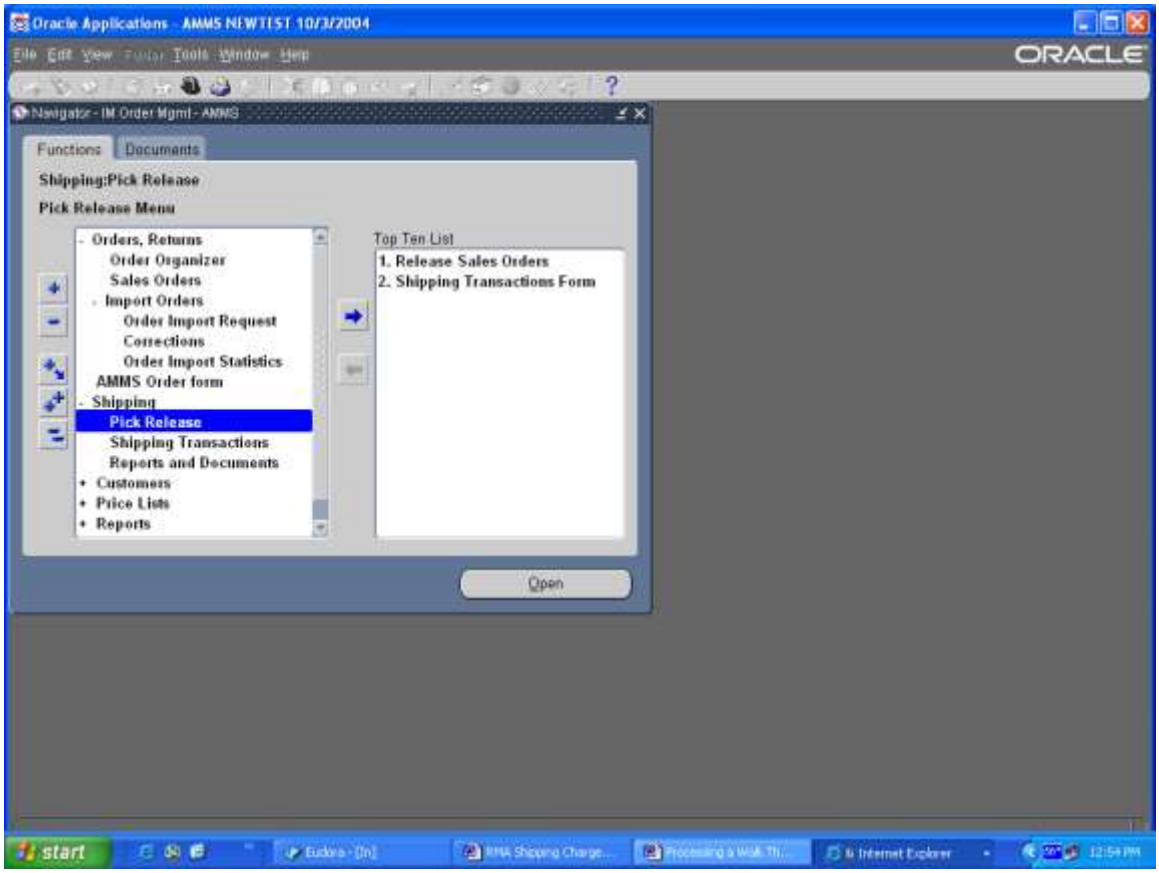
IF THE STATUS IS ANYTHING OTHER THAN AWAITING SHIPPING, CONTACT THERESA COULSON ASAP!



Close all forms and return to the EEE OM User AMMS main menu.

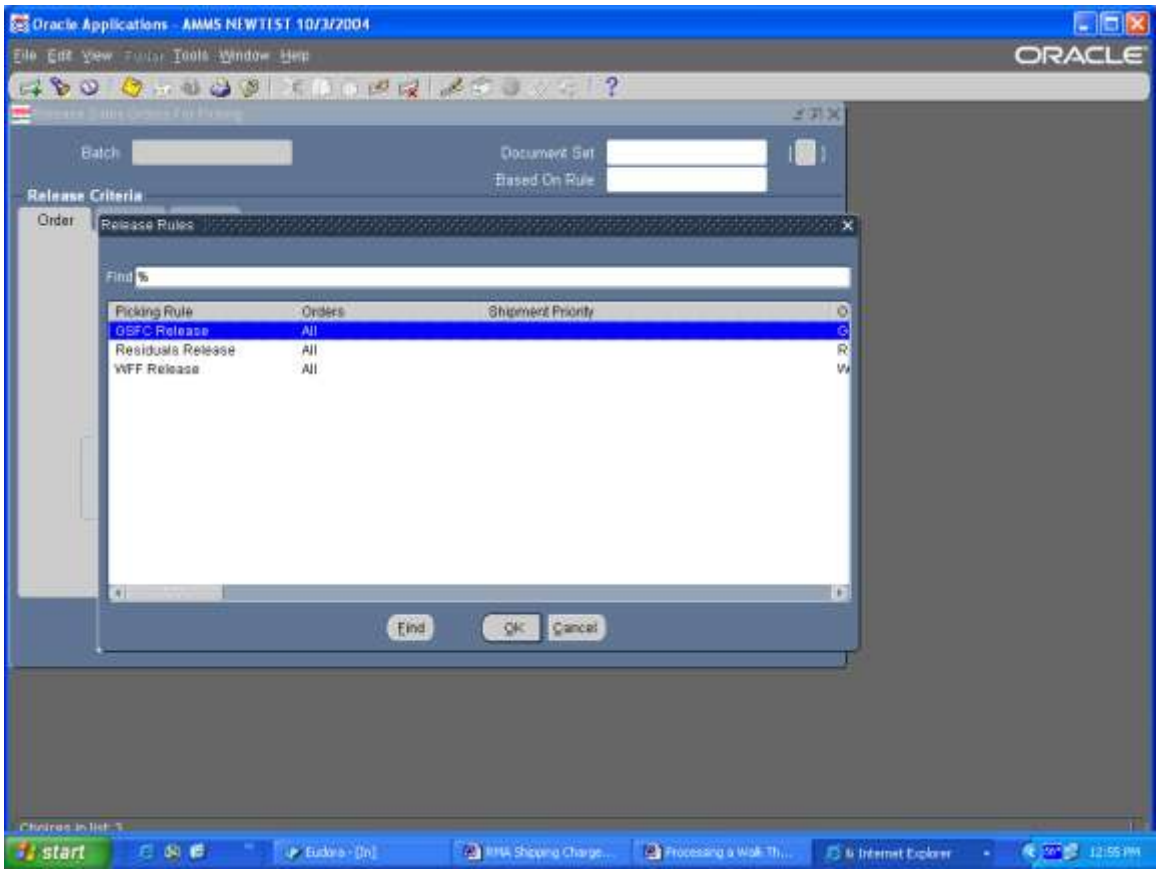
Step Description: From the EEE OM User AMMMS main menu, select Shipping > Pick Release.

Expected Results/Actions: The Release Sales Order for Picking screen will appear.



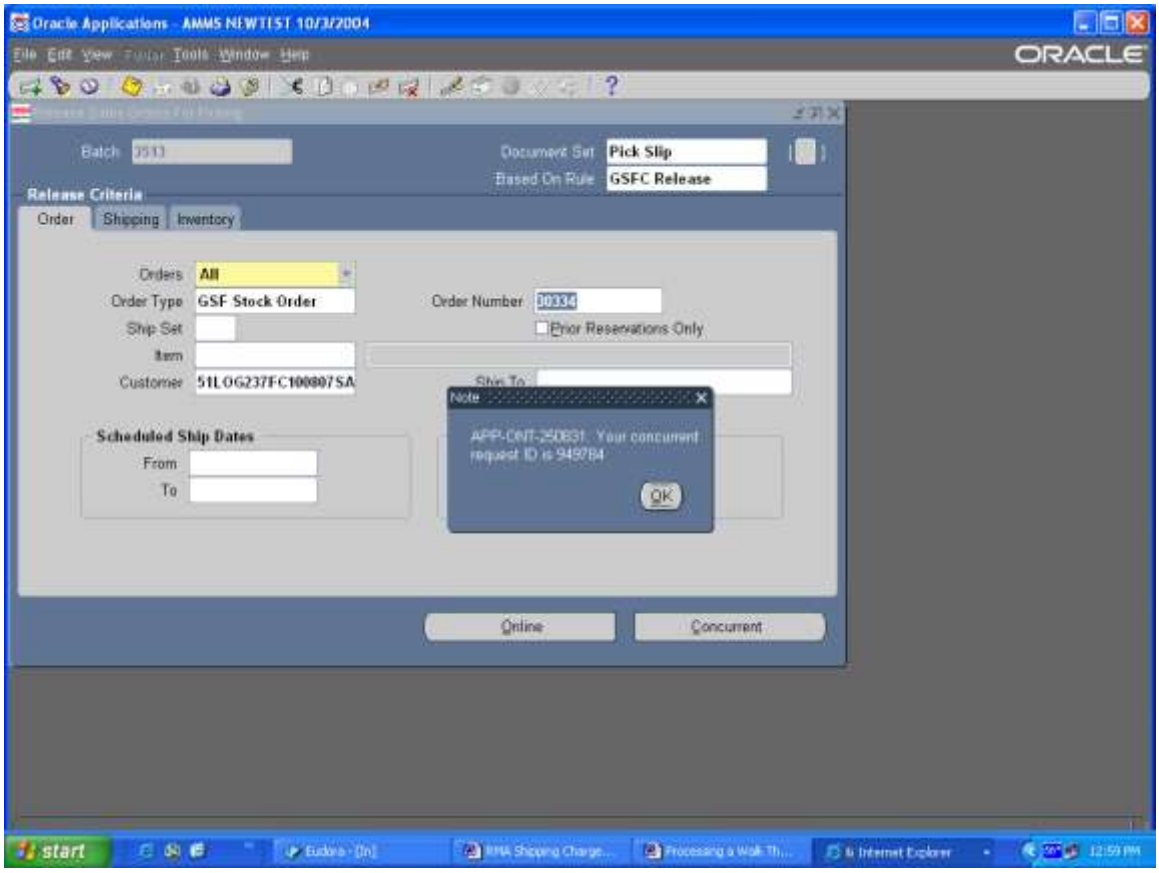
Step Description: In the Based on Rules field click on the List of Values (LOV) and select the appropriate release (GSFC for Goddard and WFF for Wallops), click on and the field will be populated

Expected Results/Actions: Document Set field and Based on Rules fields are populated.



Step Description: Go to the Order Number field and enter the Sales Order Number, **THIS MUST BE ENTERED BEFORE CONTINUEING ON**. Once the Sales Order Number is entered click on the Concurrent button

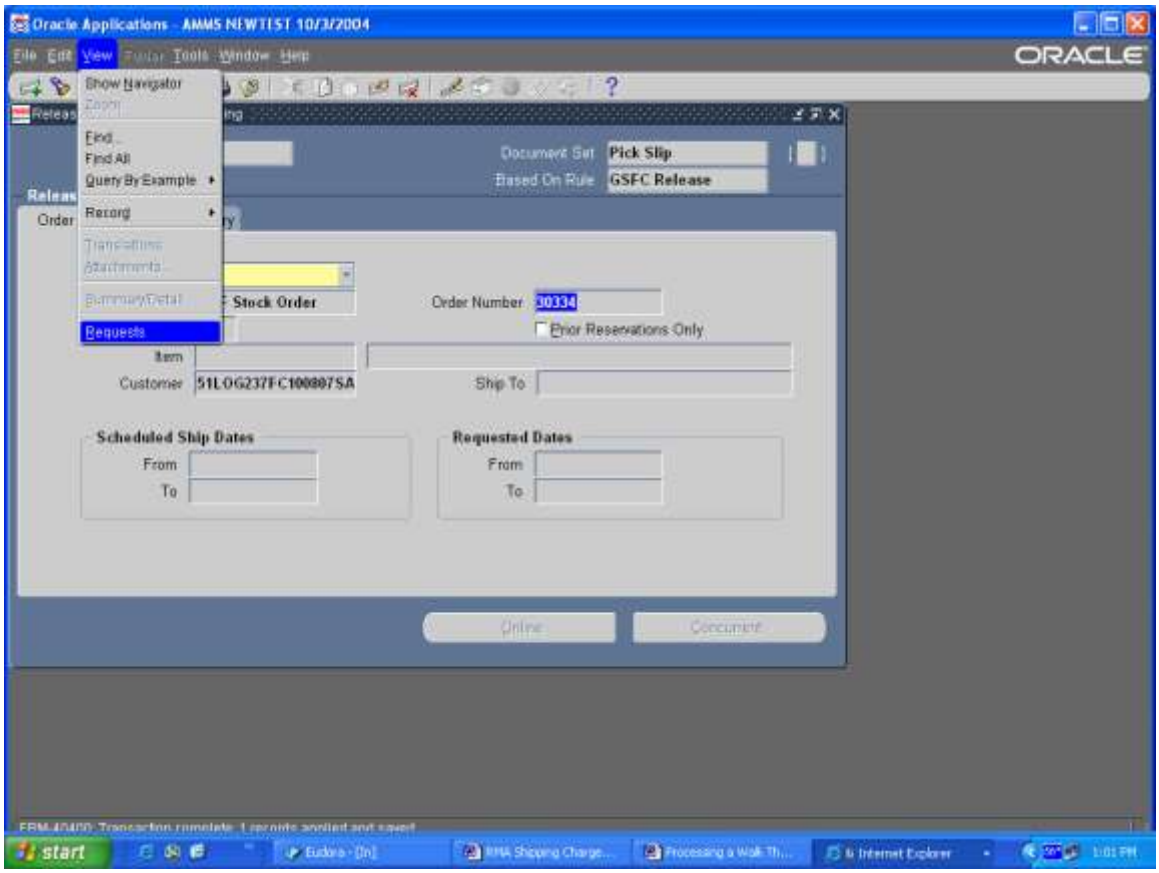
Expected Results/Actions: The field is populated, you get a Batch number and a NOTE with the Concurrent Request ID information



Click OK to the NOTE. You have completed the pick release process. You will now need to make sure the concurrent job processes to print the pick slip on the printer in the Fastener room.

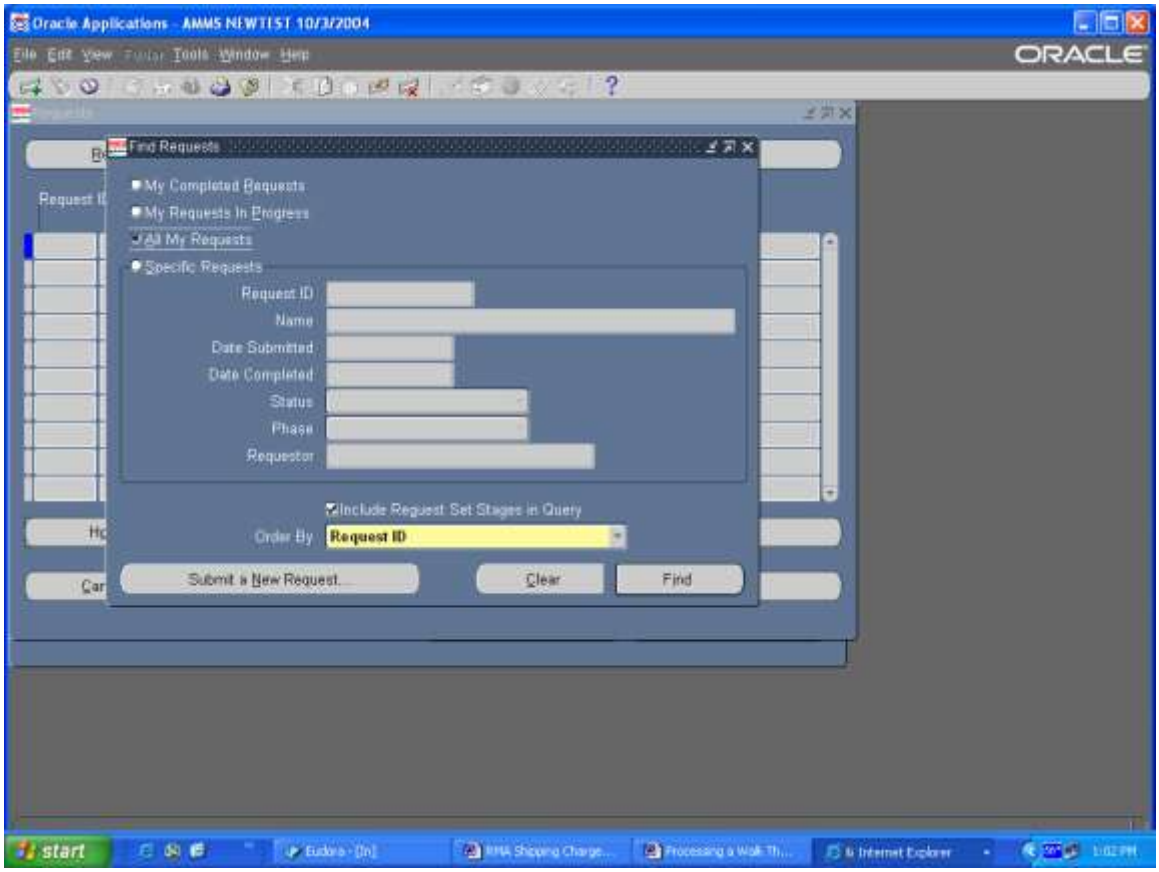
Step Description: From the Oracle Tool Bar select View and then select Requests.

Expected Results: The Find Request window will open



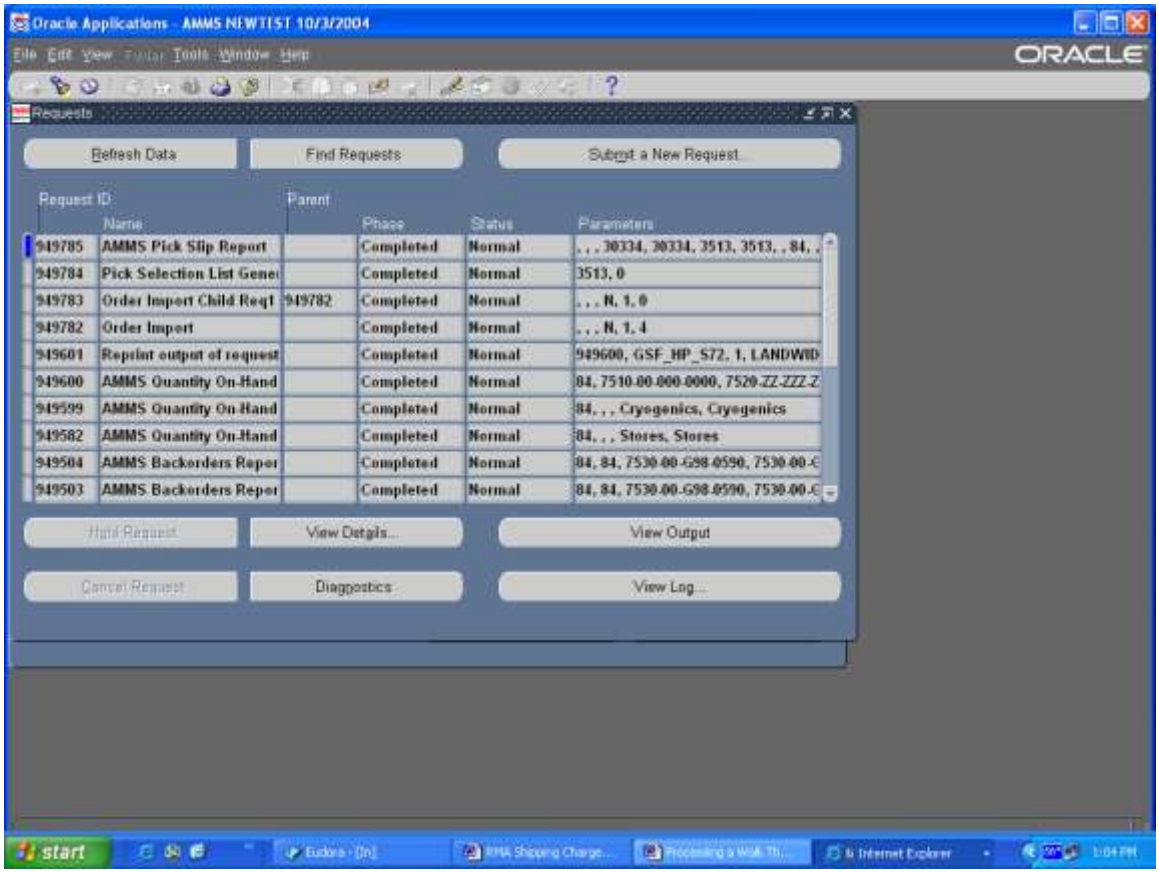
Step Description: Click FIND to see all requests that you have submitted.

Expected Results/Actions: The Request screen will appear



Step Description: You are looking for 2 concurrent jobs to complete, Pick Selection List Generation and AMMS Pick Slip Report. The Pick Selection List Generation will complete first then the AMMS Pick Slip Report will run.

Expected Results/Actions: All jobs will say Completed Normal



Step Description: Once the AMMS Pick Slip Report has completed click on the View Output button to see the output from the report. This will let you see if a pick slip generated.

Expected Results/Actions: The AMMS Pick Slip Report will appear

If for some reason there is NO DATA found contact your Lead to trouble shoot the process. If needed contact Theresa Coulson also.

If all is well. Contact the Fastener warehousemen and advise of order to be pulled from locator.

Process is Complete.

Notes:

Walk Thru can be processed for partial qty's, just follow the same directions, the order will only pick release for the qty that is available. The remaining qty will go on backorder, alert the appropriate Supply Team of the backorder so that they can get material procured.

AMMS TRAINING SCRIPT

Expense Sales Order Credit Only

Purpose

The purpose of this training script is to show users though giving credit for an expense only sales order.

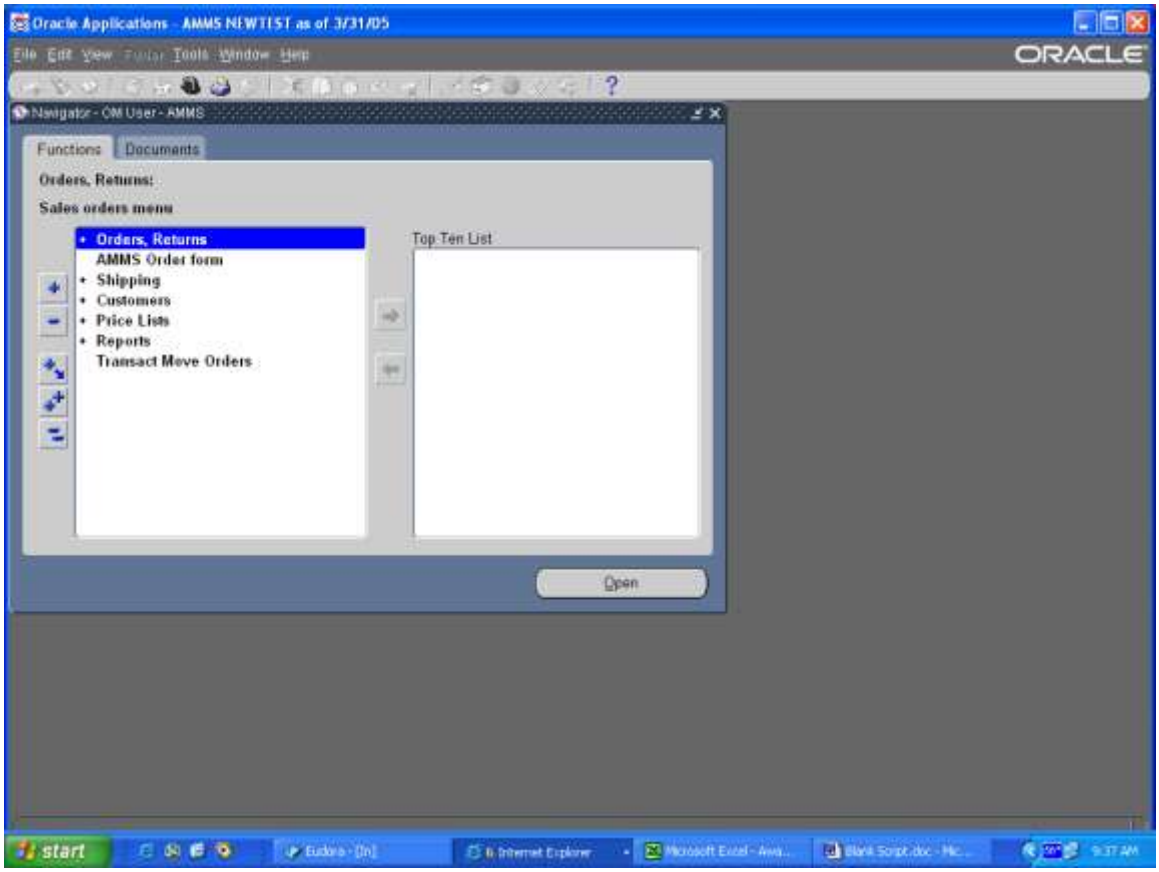
Audience

Buyers

Prepared By	Theresa Coulson
Creation Date:	05/24/2005
Document Name	Expense Sales Order Credit.doc
Version	2
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Order Management.	

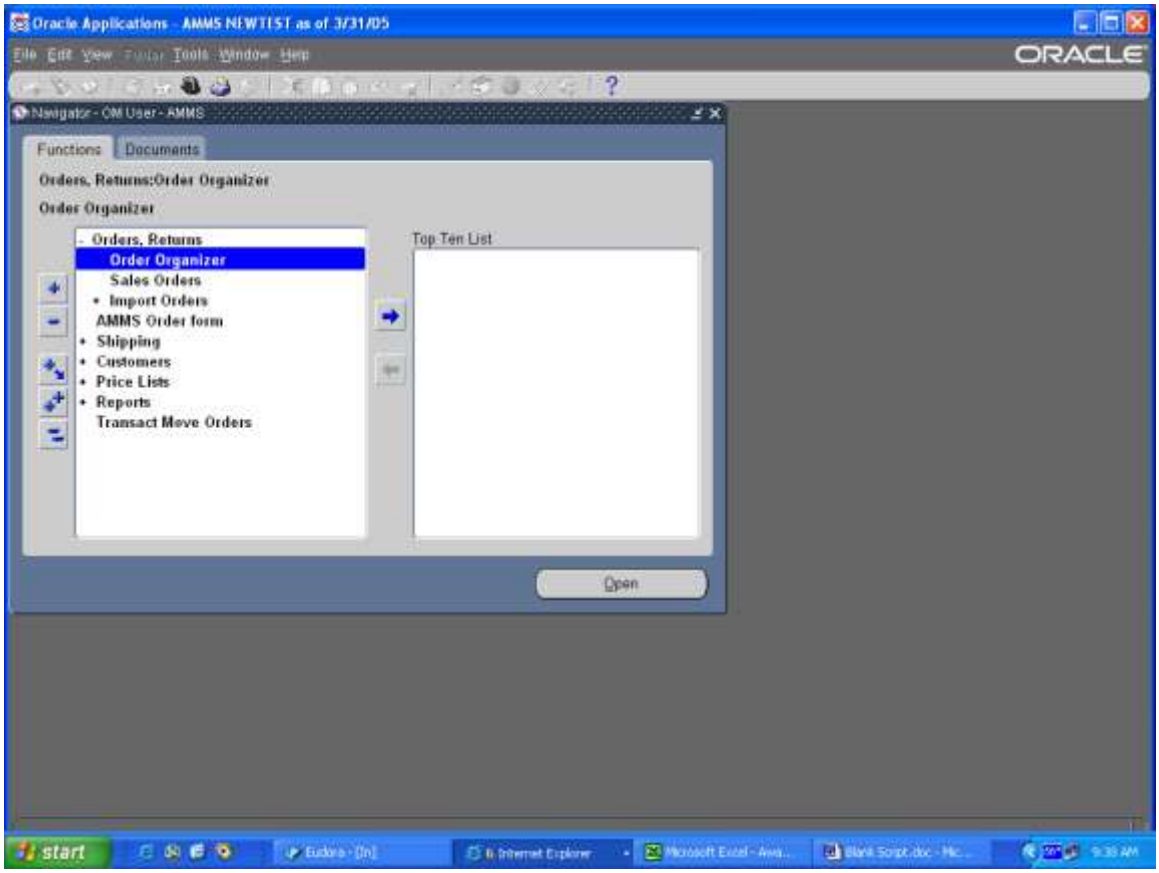
Step Description: Sign onto Oracle and select the OM User responsibility

Expected Results: OM User main menu will appear



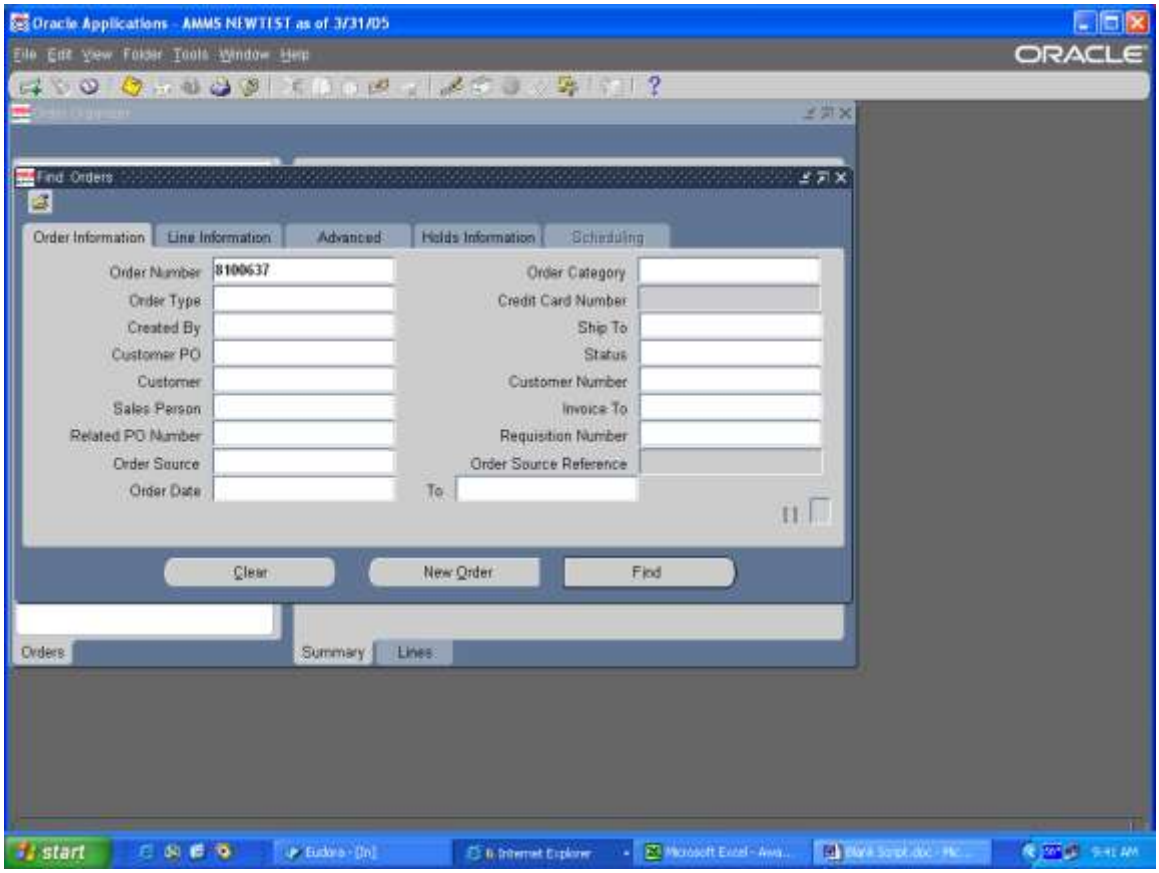
Step Description: From the OM User main menu select Orders, Returns > Order Organizer click on the Open button

Expected Results: Find Order Screen will appear



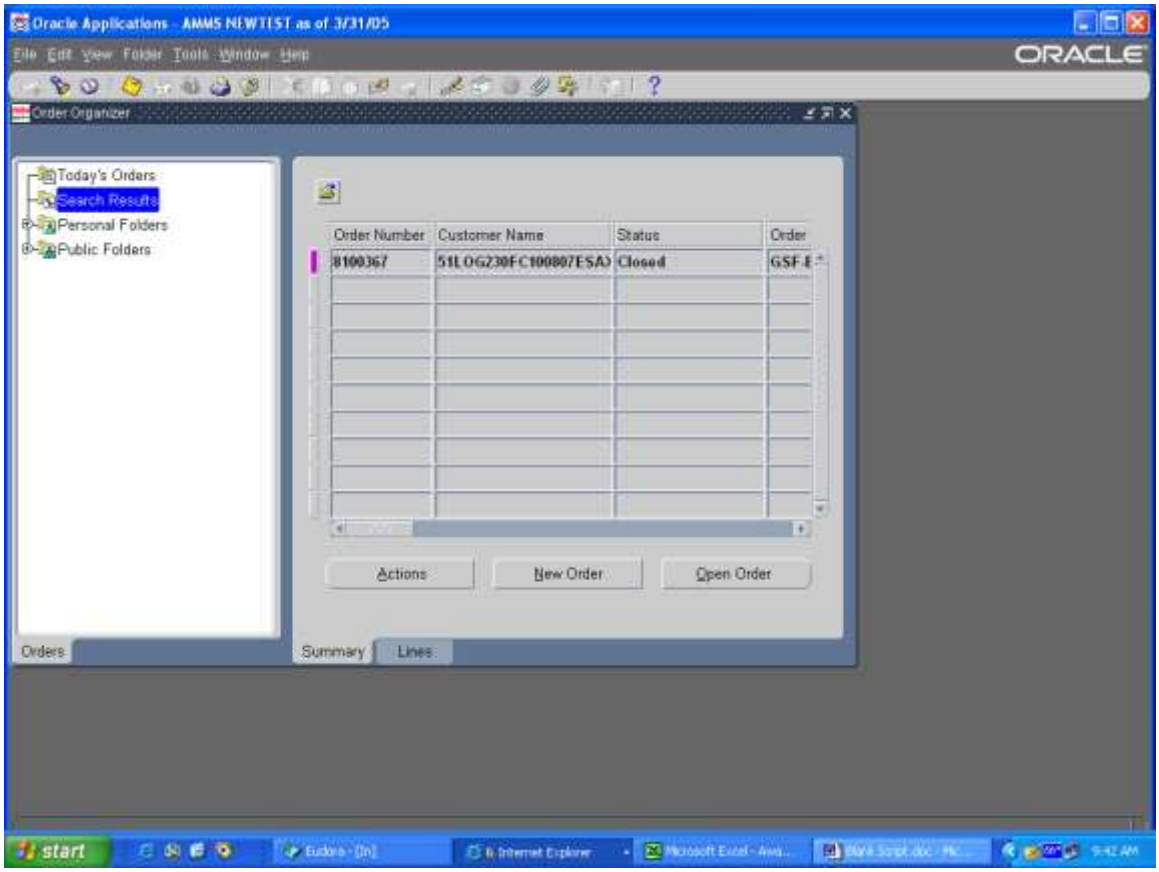
Step Description: Enter the original sales order that credit is needed against in the Order Number field click on the Find button

Expected Results: Order Organizer window will appear



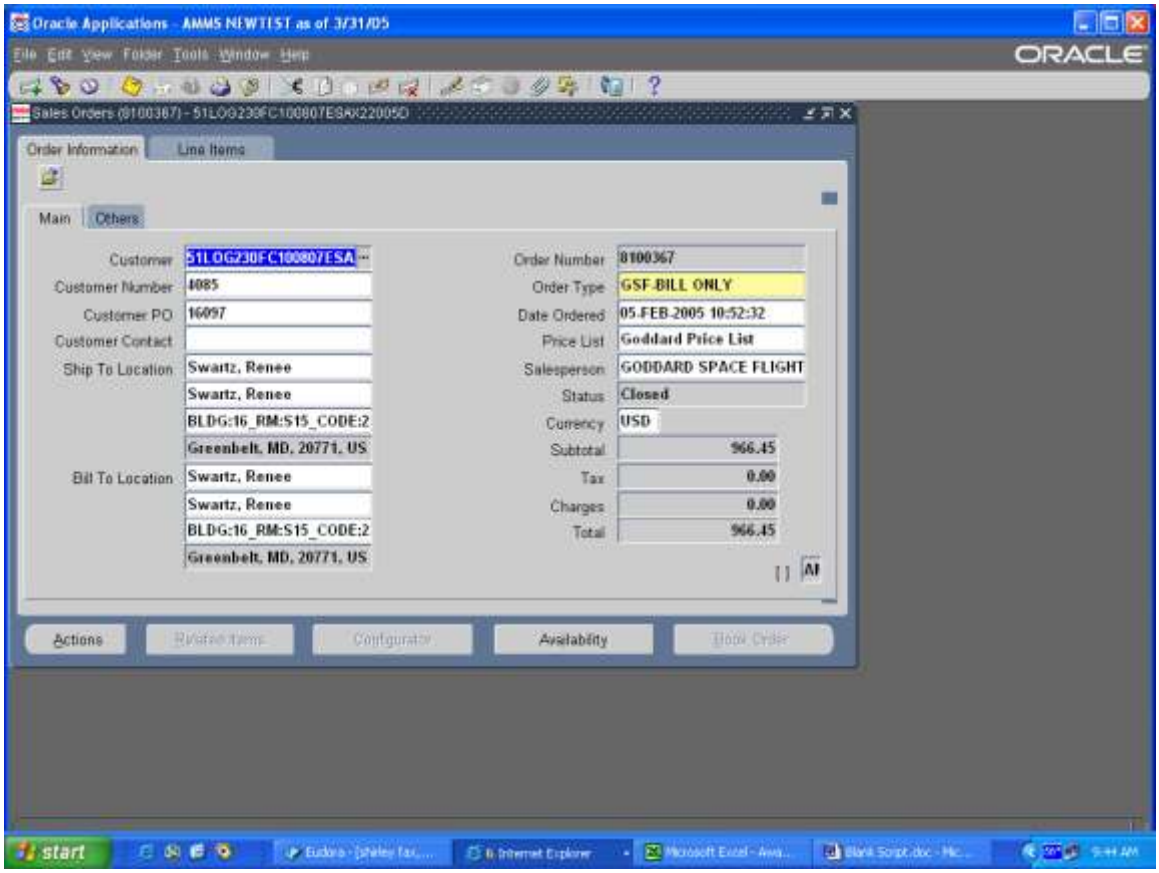
Step Description: Click on the Open button

Expected Results: Sales Order information window will appear



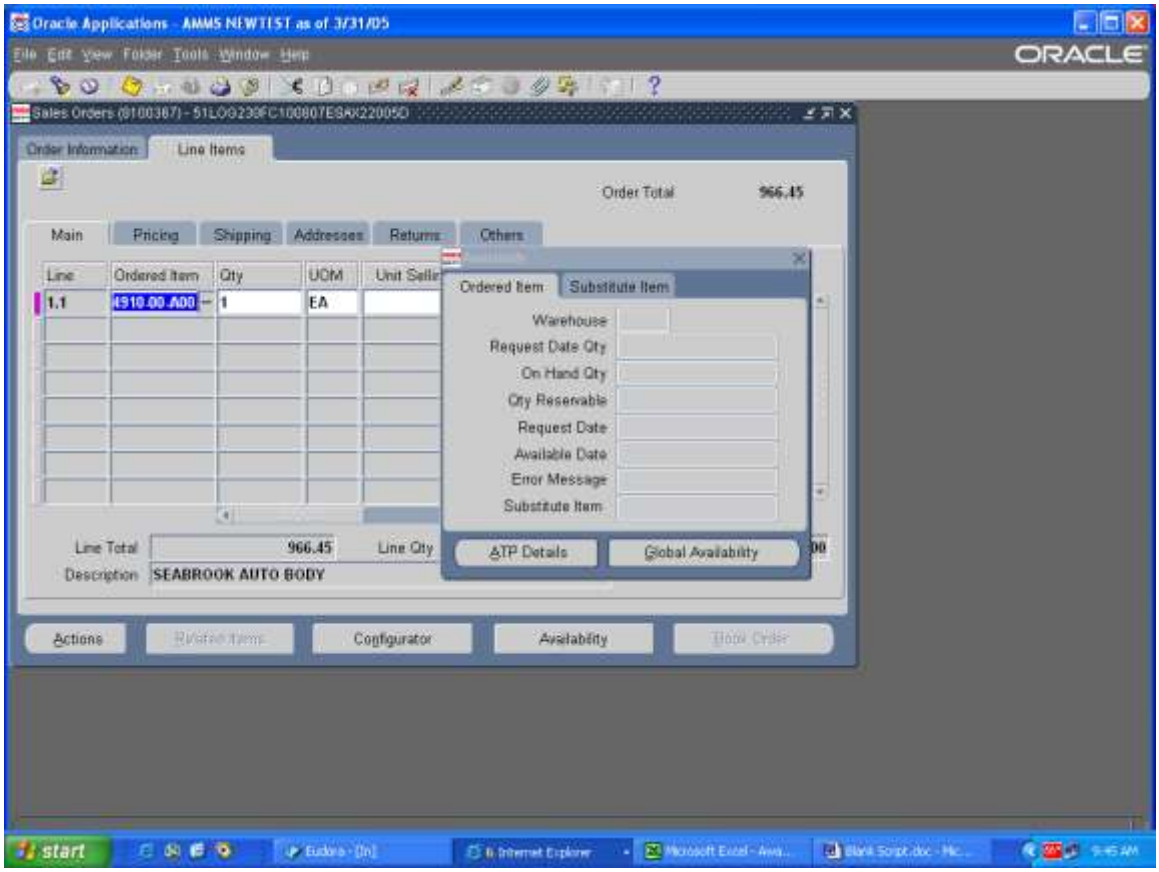
Step Description: Verify that all of the customer information is correct, click on the Line Items Tab

Expected Results: Window view will change



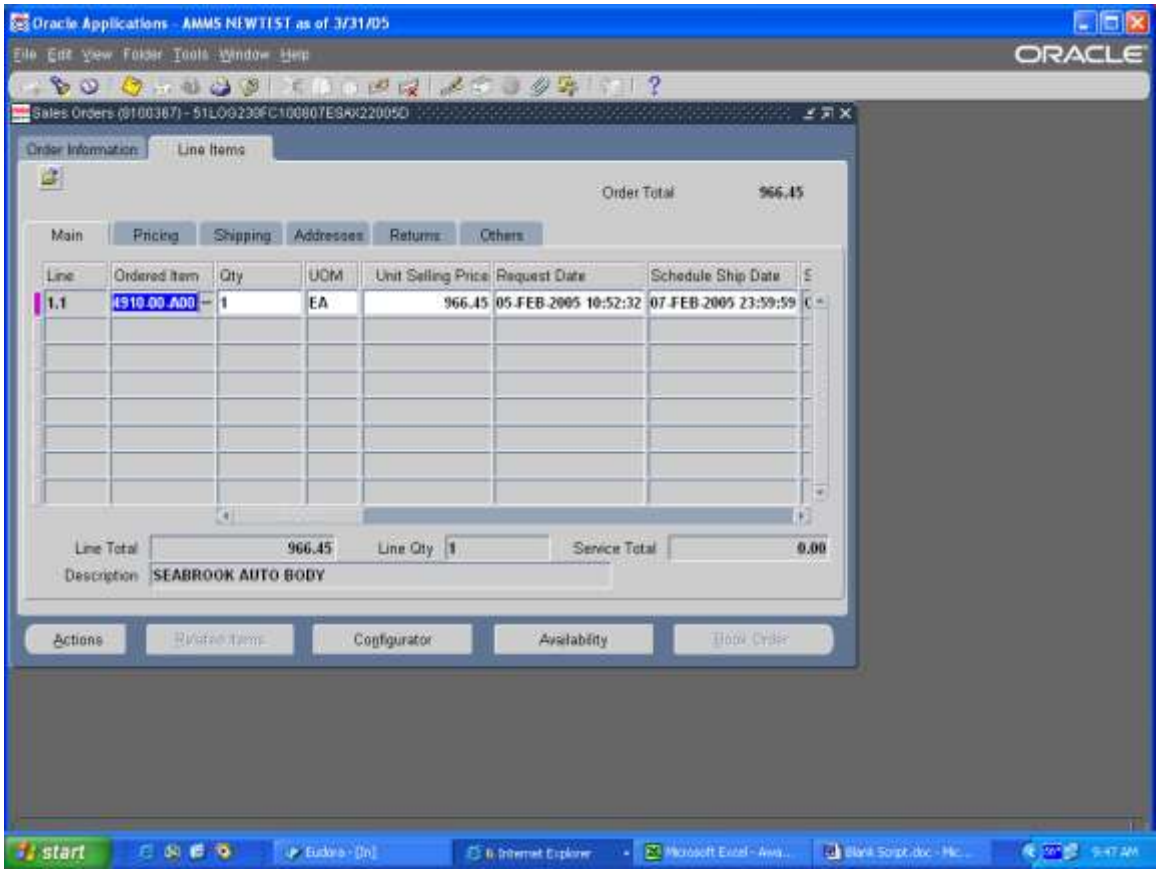
Step Description: Close the Availability window

Expected Results: Window will go away



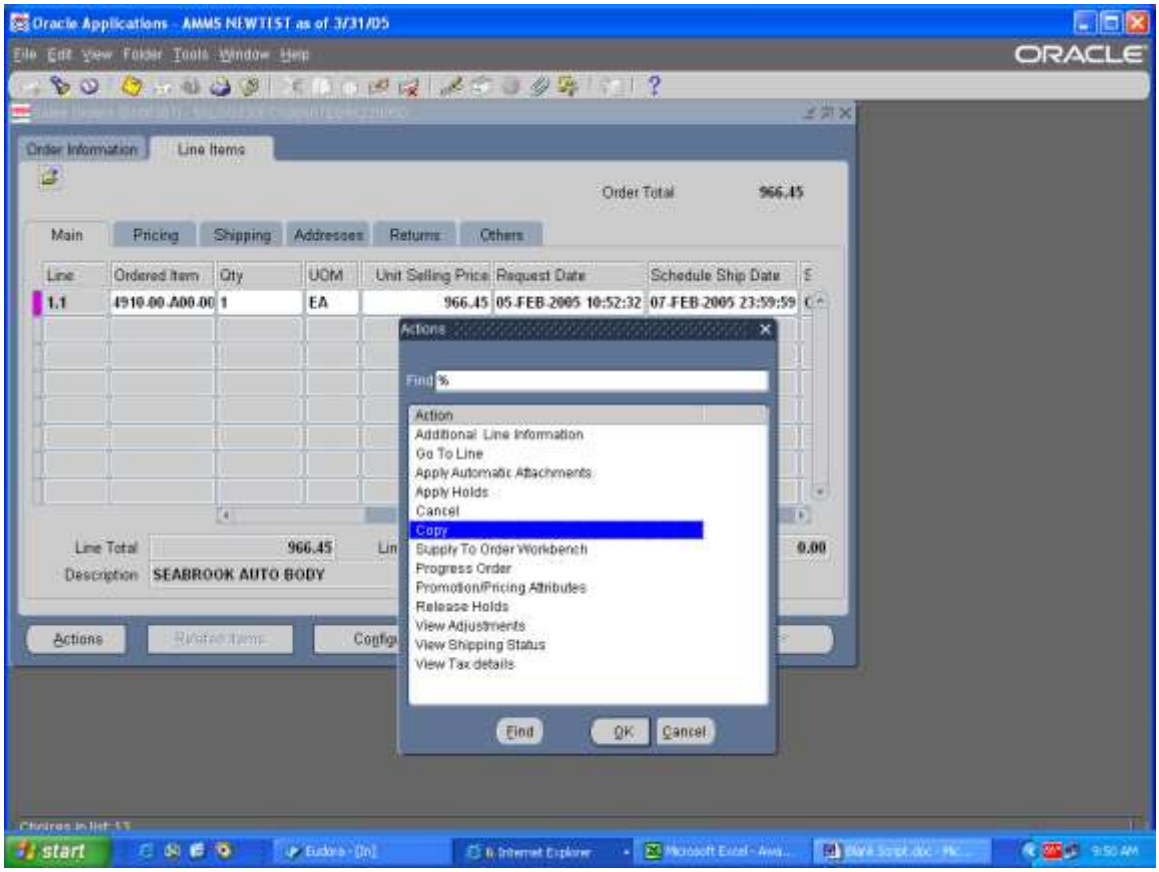
Step Description: Select the line that you want to give credit to, this click on the Action Button at the bottom left of the screen

Expected Results: Actions window will appear



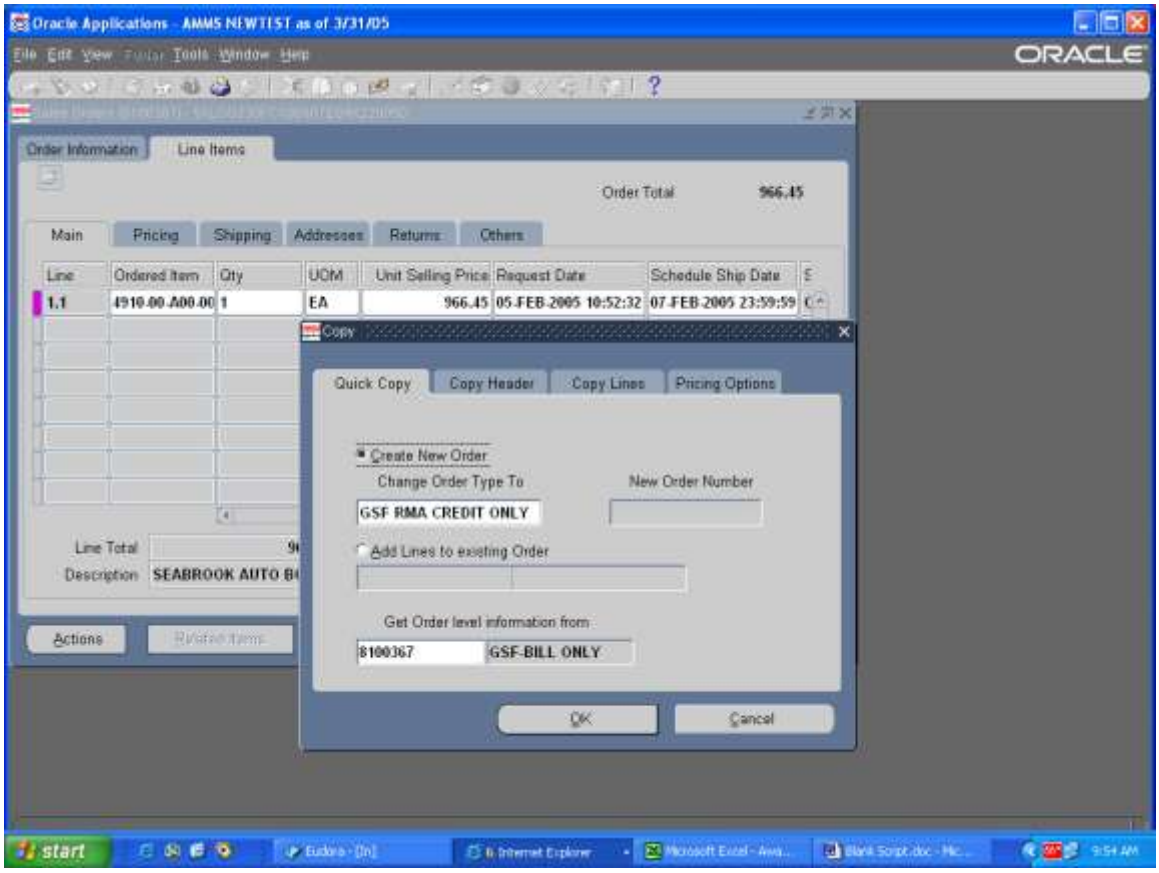
Step Description: From the Actions window select Copy, click Ok

Expected Results: Copy window will appear



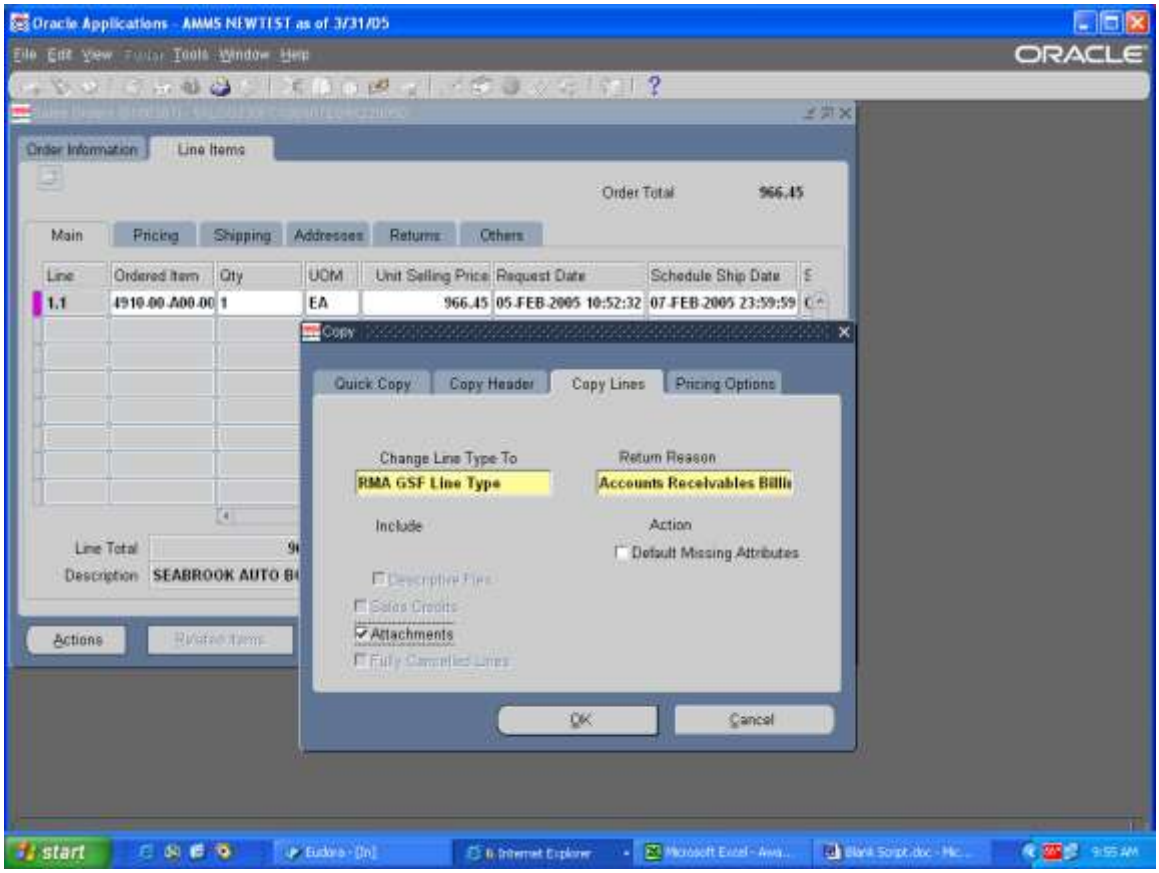
Step Description: In the Copy window at the Quick Copy tab select Create New Order, then click in the field and click on the LOV and select GSF RMA CREDIT ONLY. Then in the Get Order Level Information from field, enter the original sales order number, **this MUST be done, or credit will not process through.** Go to the Copy Lines tab.

Expected Results: Quick Copy tab will have information, and window view will change



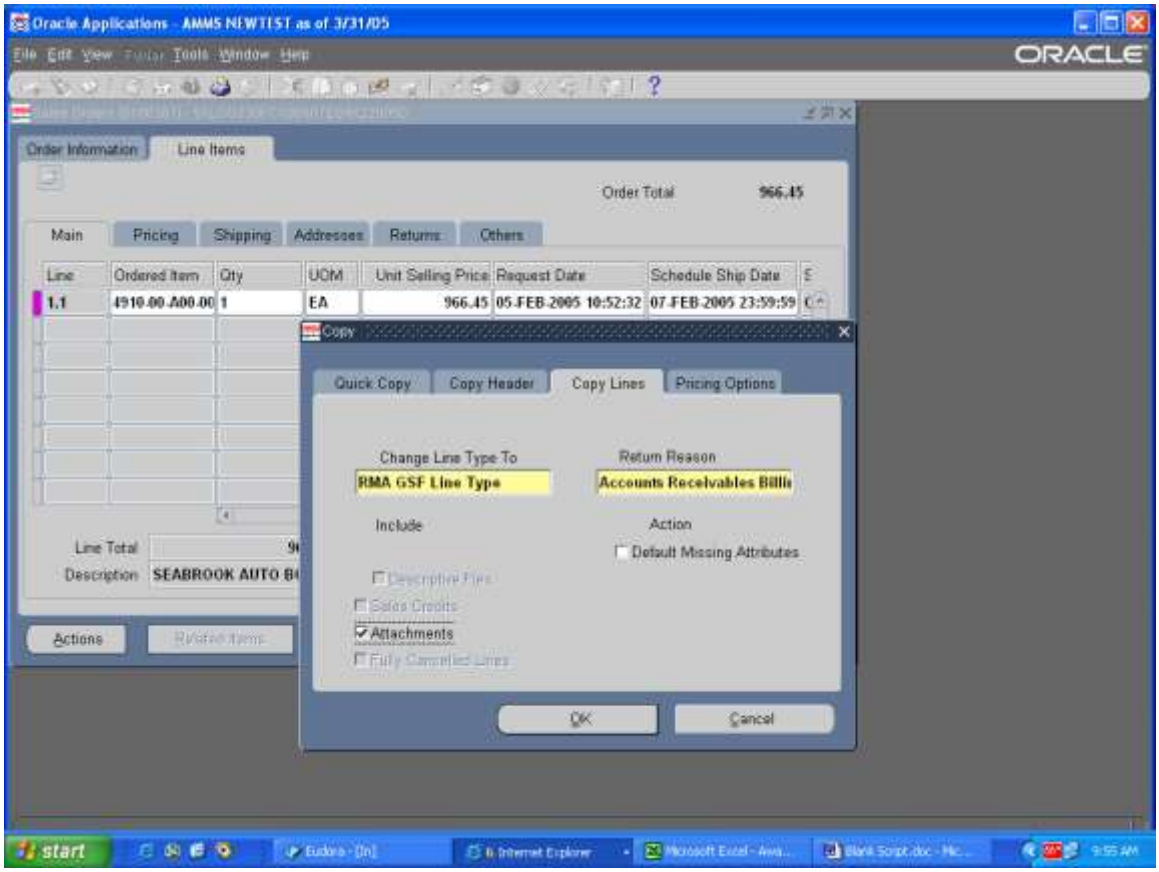
Step Description: In the Return Reason field click on the LOV and select the best reason that applies to the return.

Expected Results: Field will be populated



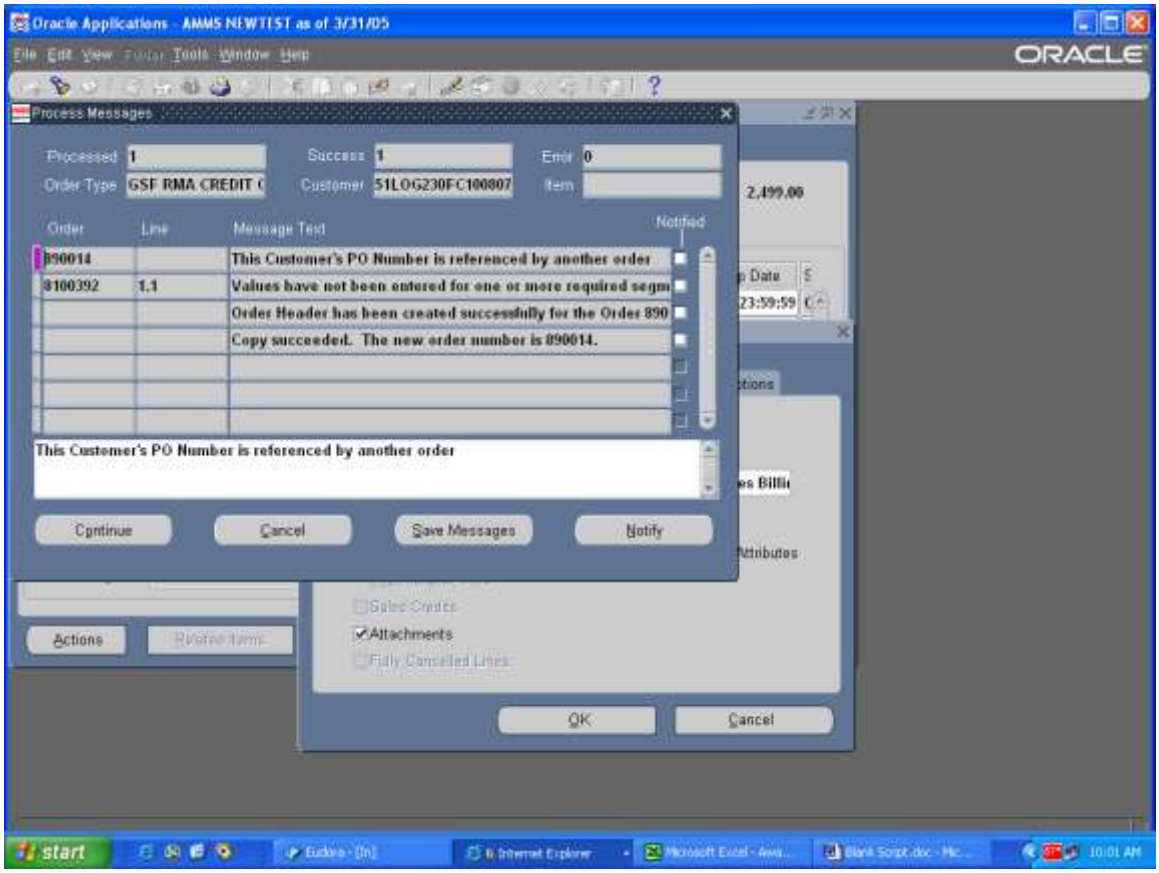
Step Description: Still in the Copy window click on the OK button

Expected Results: Process Message window will appear



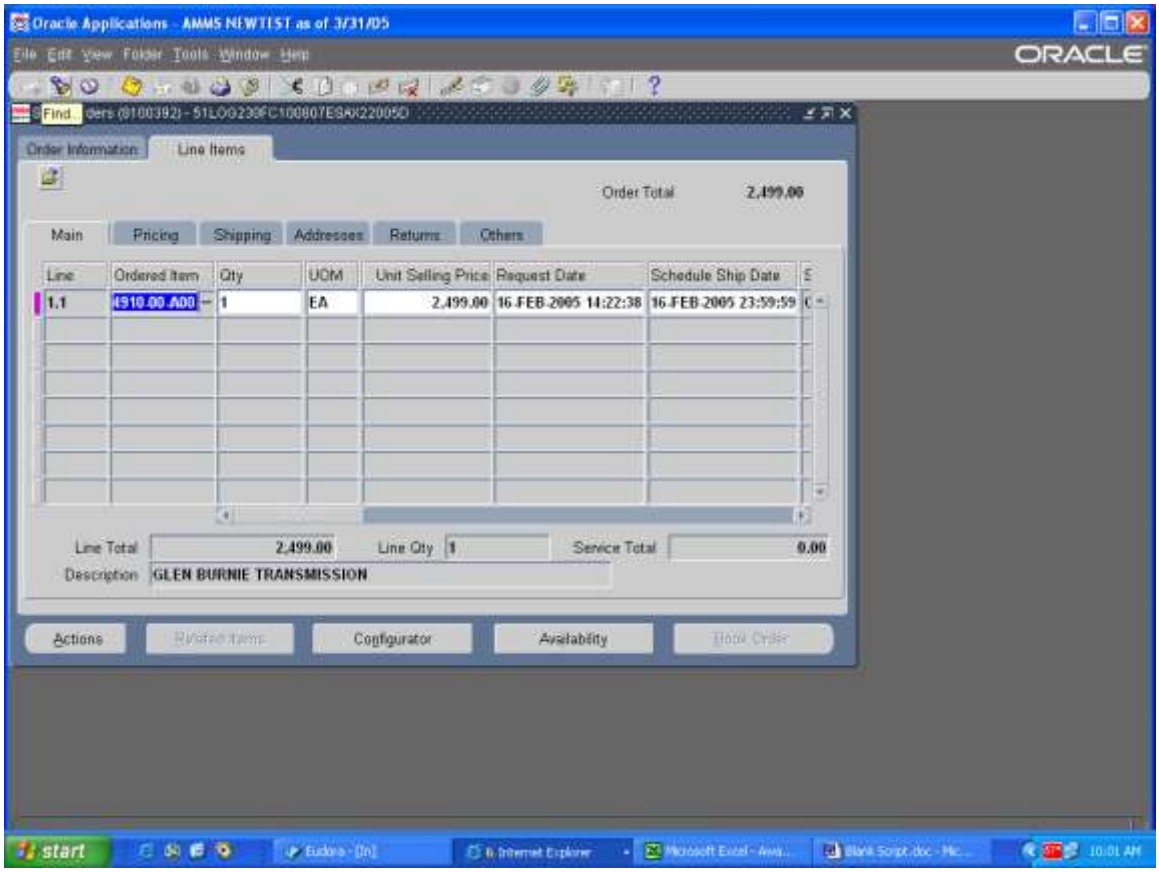
Step Description: Write down the new GSF RMA Credit Only order number for your records, then click on the continue button

Expected Results: Process Message window will go away



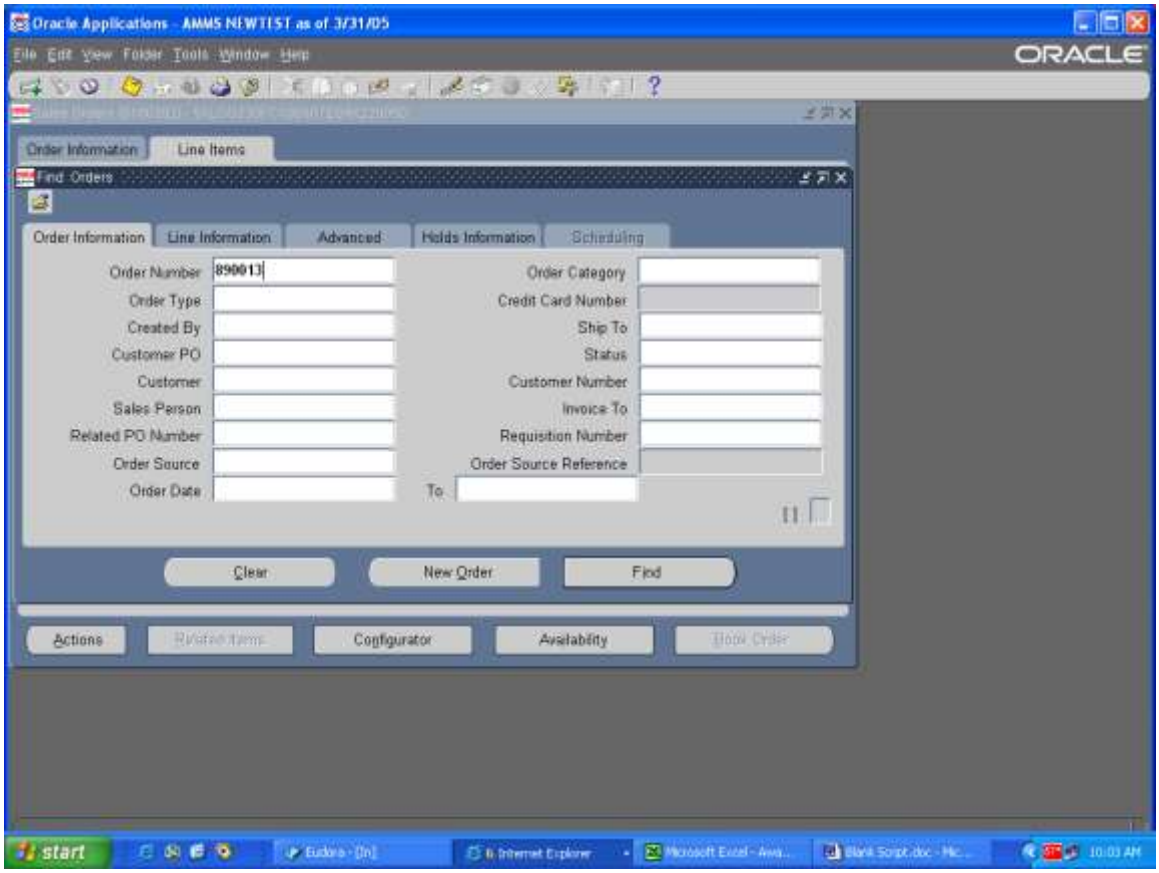
Step Description: From the Tool bar use the flashlight to refresh your screen

Expected Results: Find Orders window will appear



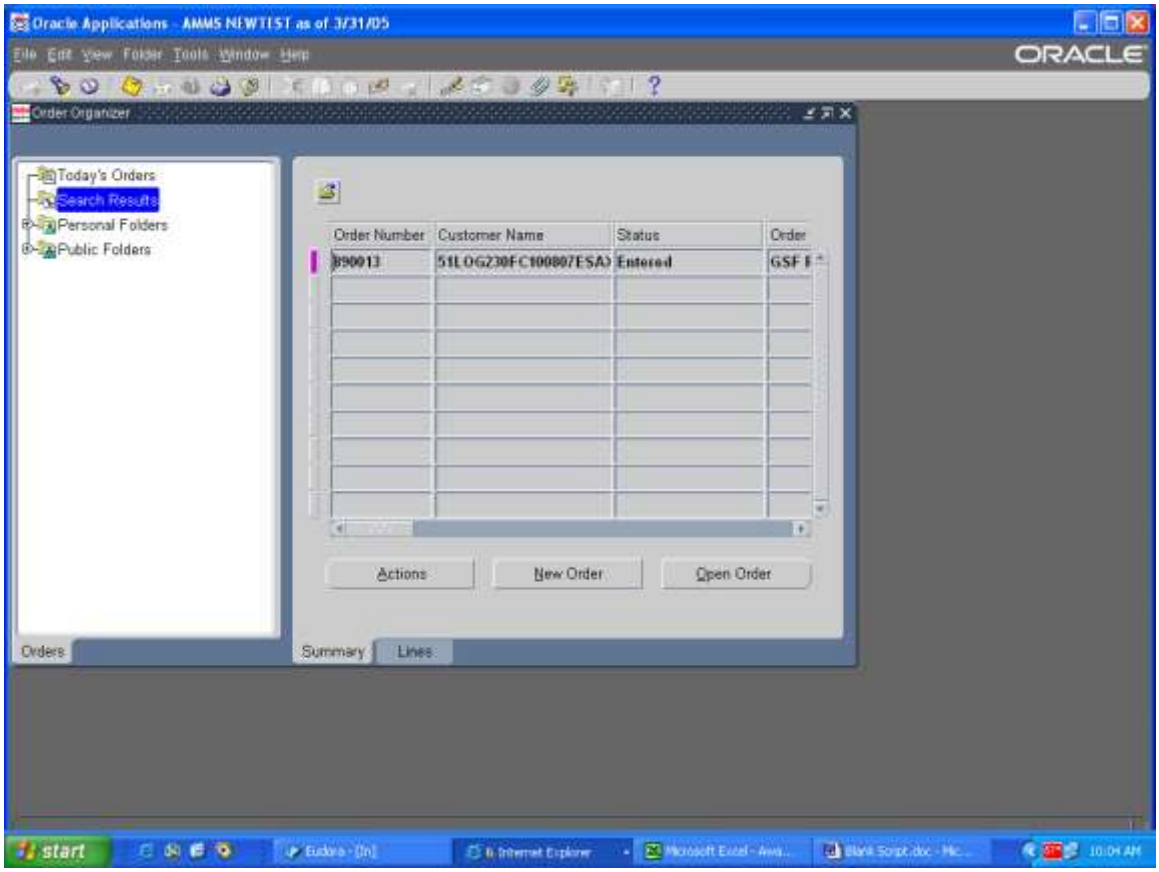
Step Description: In the Order Number field enter the new GSF RMA Credit Only order number and click on the Find button

Expected Results: Order Organizer window will appear



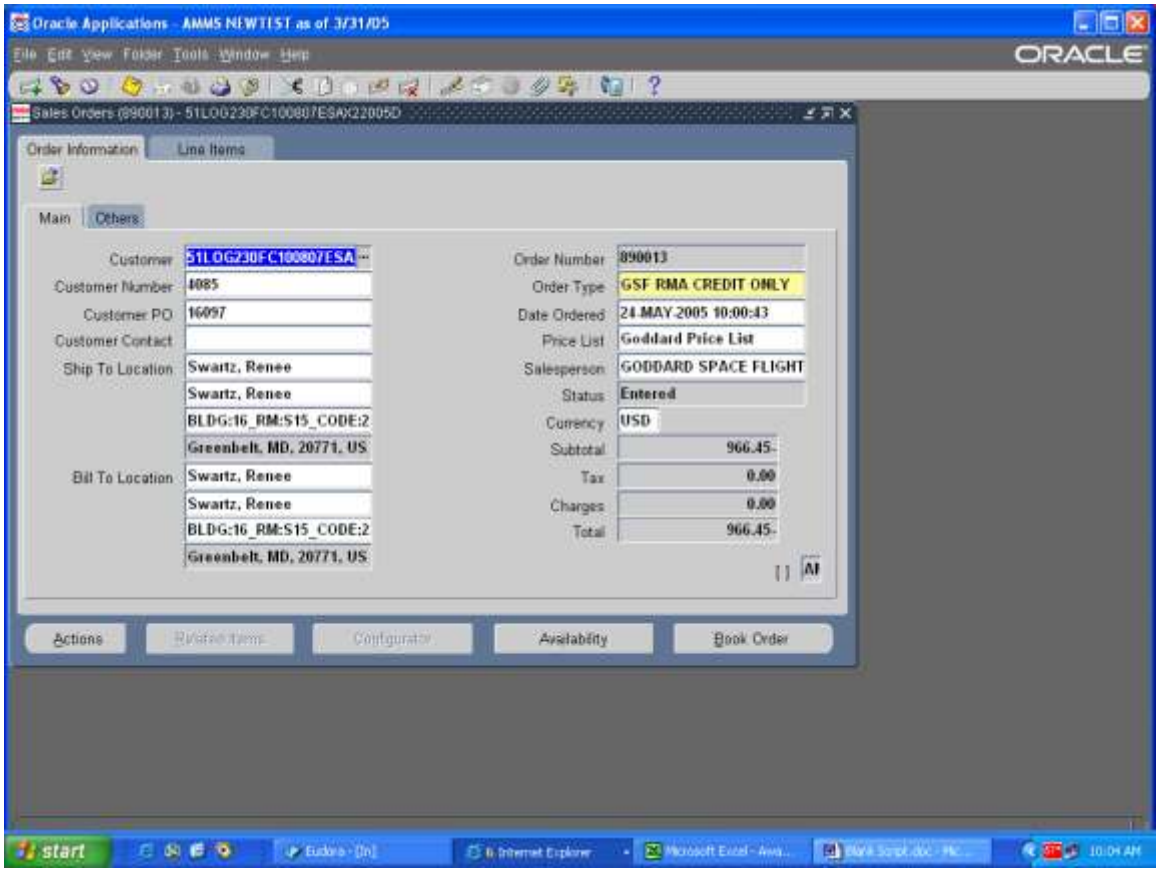
Step Description: Click on the Open Button

Expected Results: Sales Order window will appear



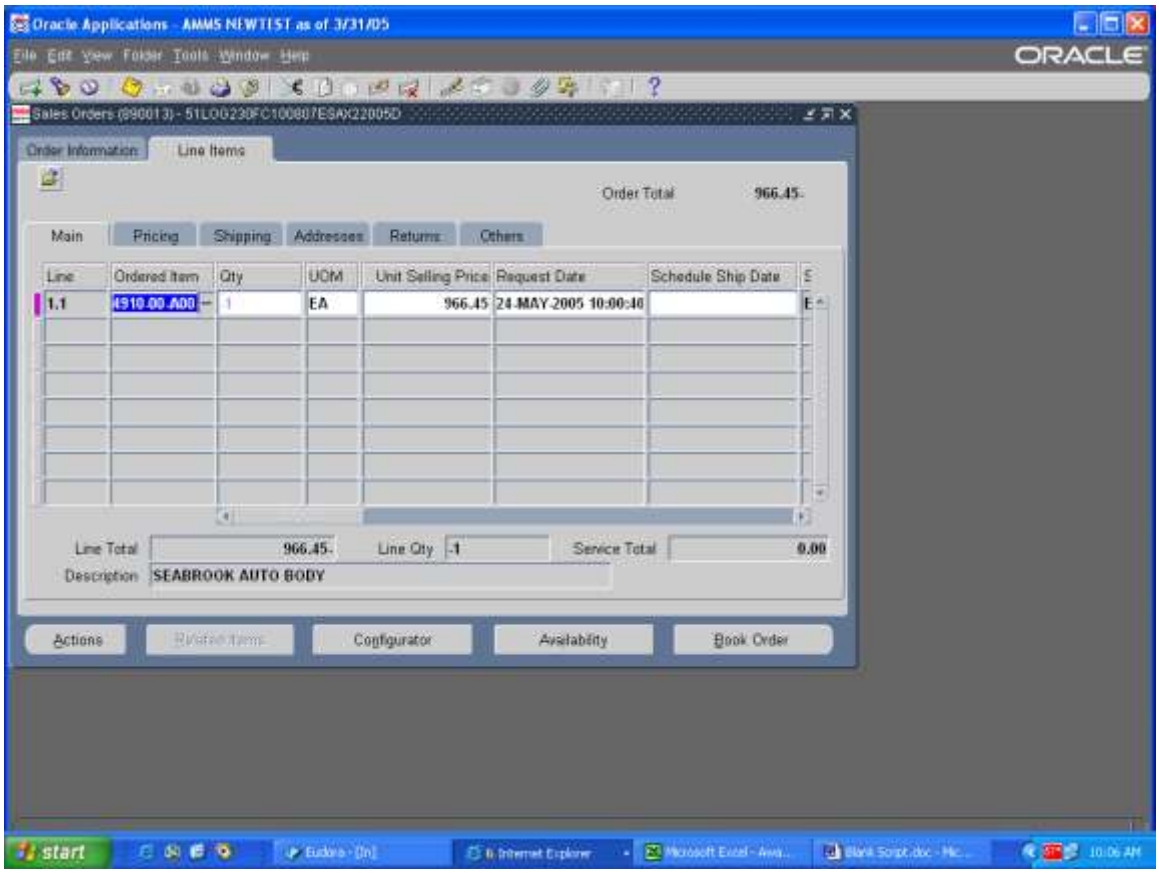
Step Description: Verify all of the information, click on the Line Items tab

Expected Results: Window view will change



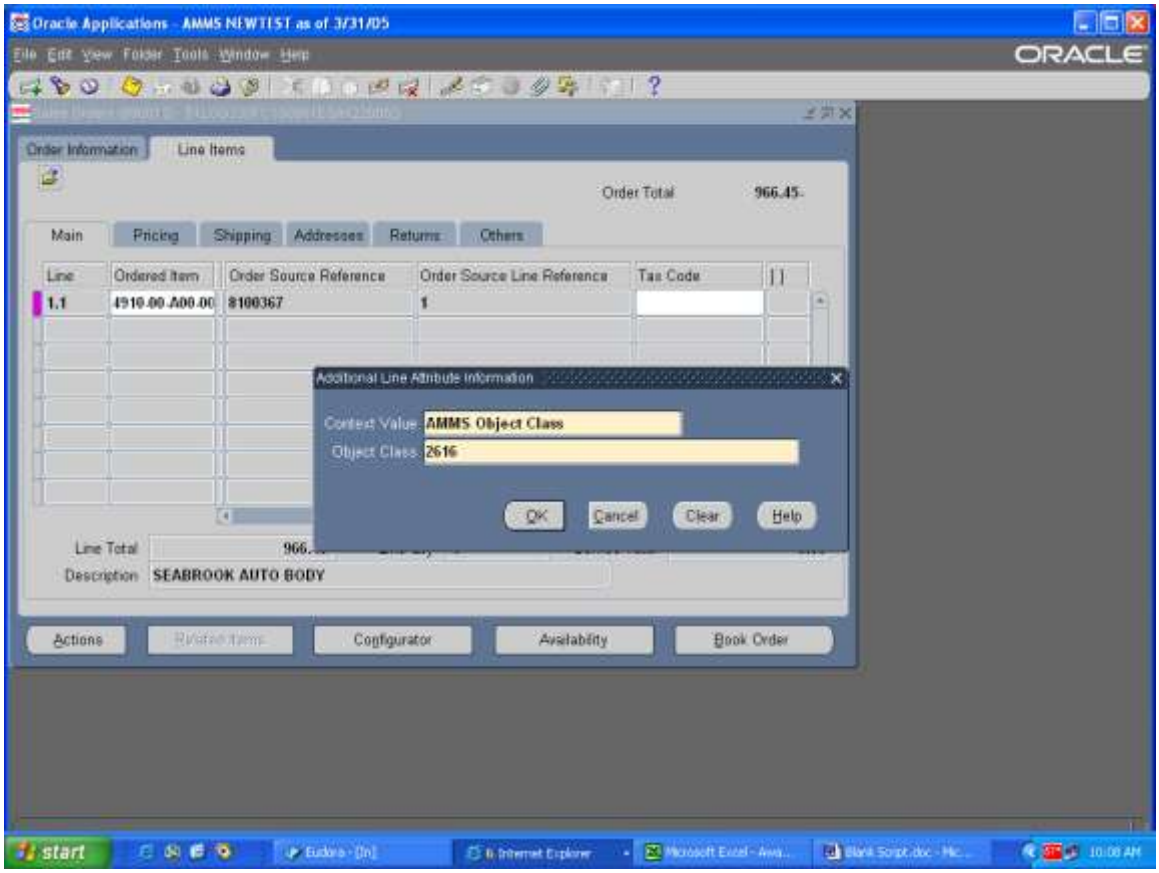
Step Description: You will now see the line information, and notice that the qty is a light purple color this indicated that this is a credit. Use the scroll bar and move all the way to the end of the Main tab until you see a field with [ ] click in this field.

Expected Results: Additional Line Attribute Information window will appear



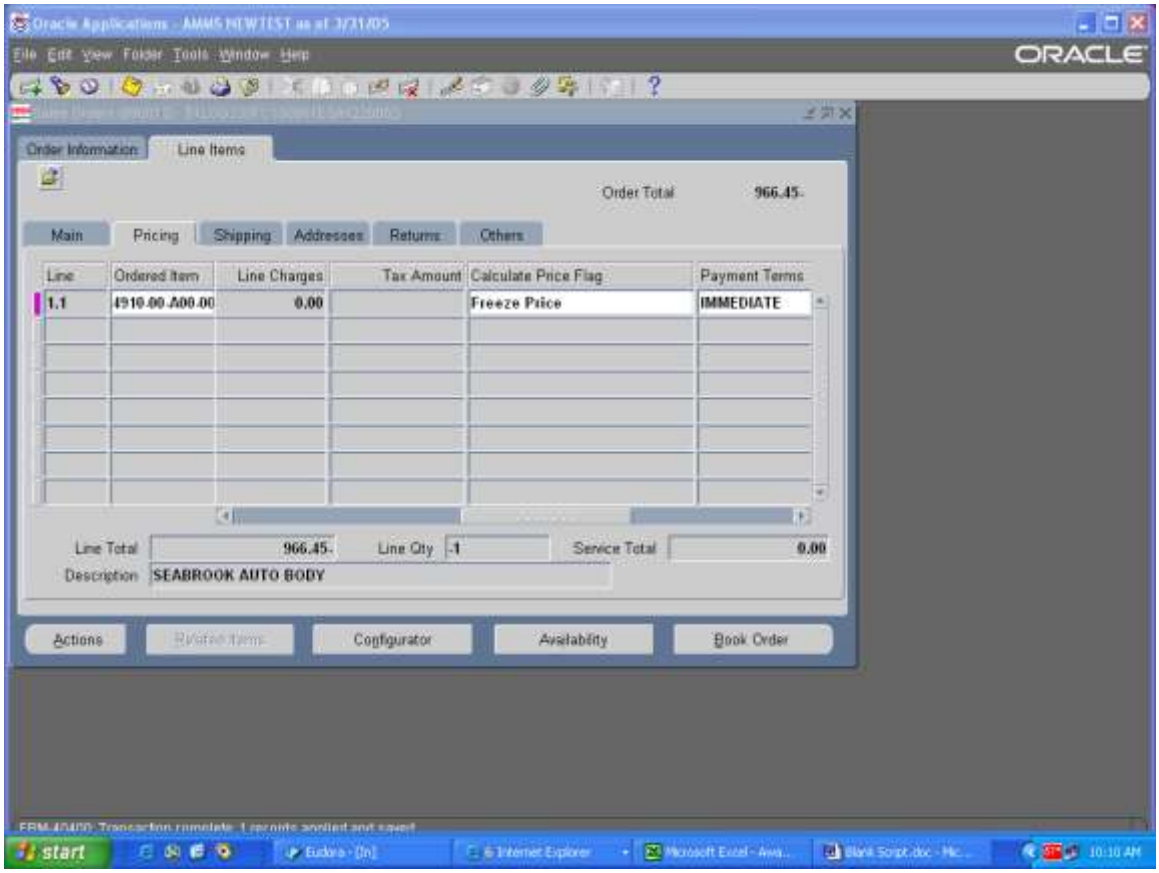
Step Description: In the Object Class field enter the appropriate Object Class for the item, see attached list, click OK

Expected Results: Field will be populated and window will close



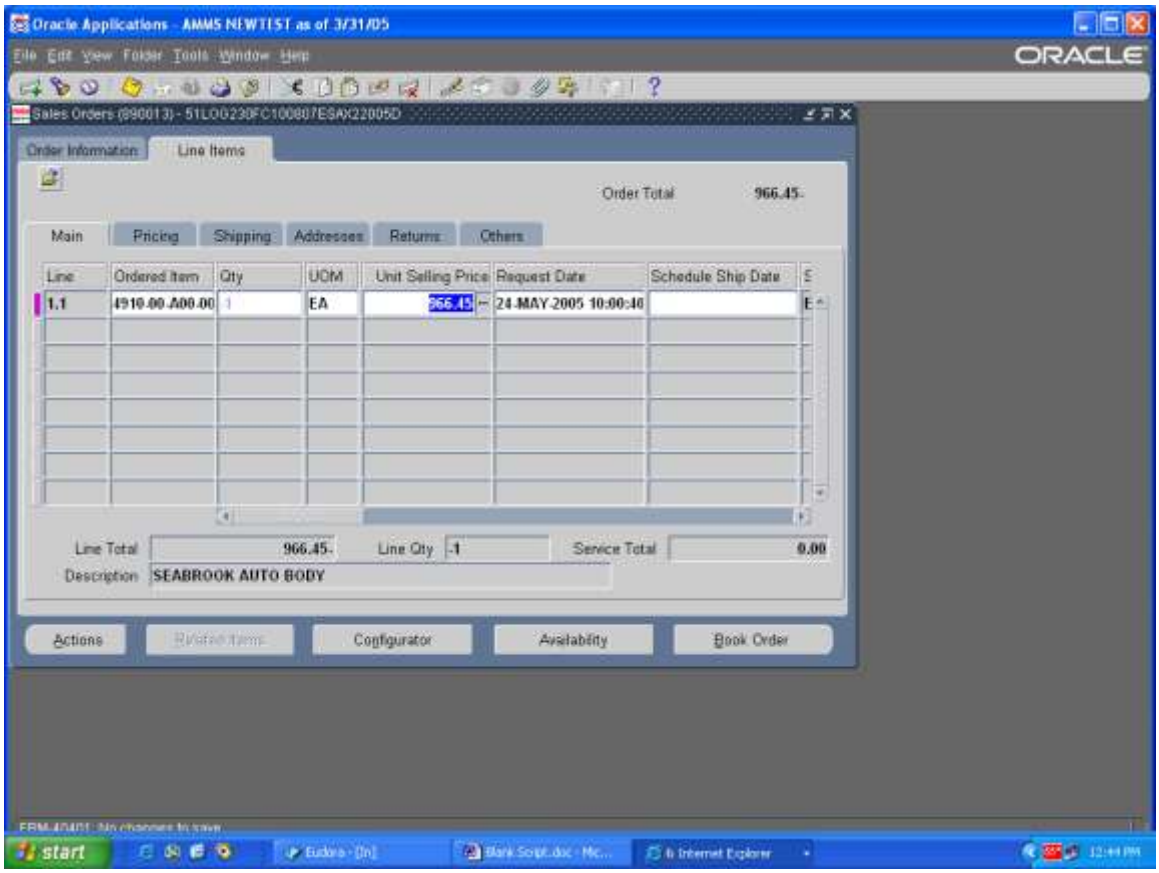
Step Description: At the Pricing Tab, scroll to the Calculate Price Field, change this field to Freeze Price, Save your work

Expected Results: Field view will change, Transactions Saved and Applied message



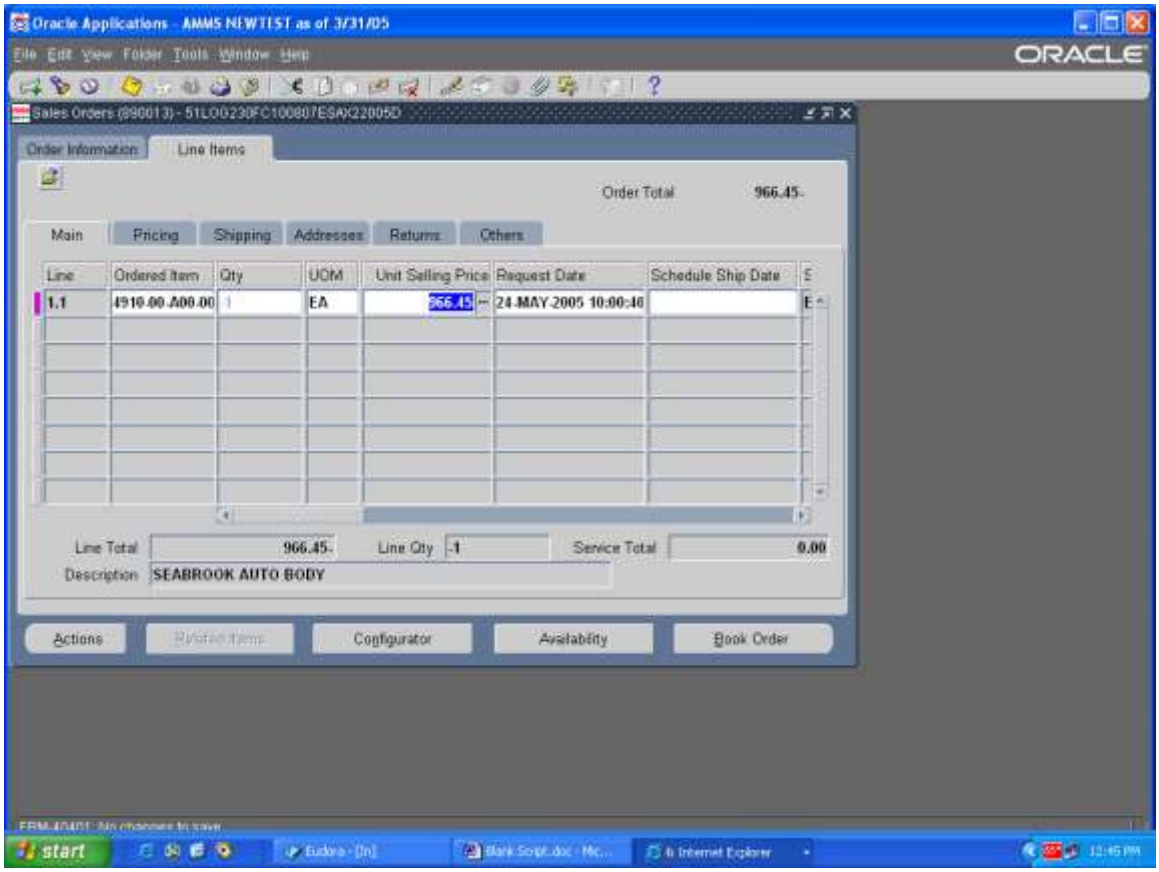
Step Description: Go back to the Main tab and verify the cost that you are giving credit for, you can only credit the amount that was originally charged. If the credit price is different click in the Unit Selling Price field and change the cost. Save your work

Expected Results: Transactions Saved and Applied message



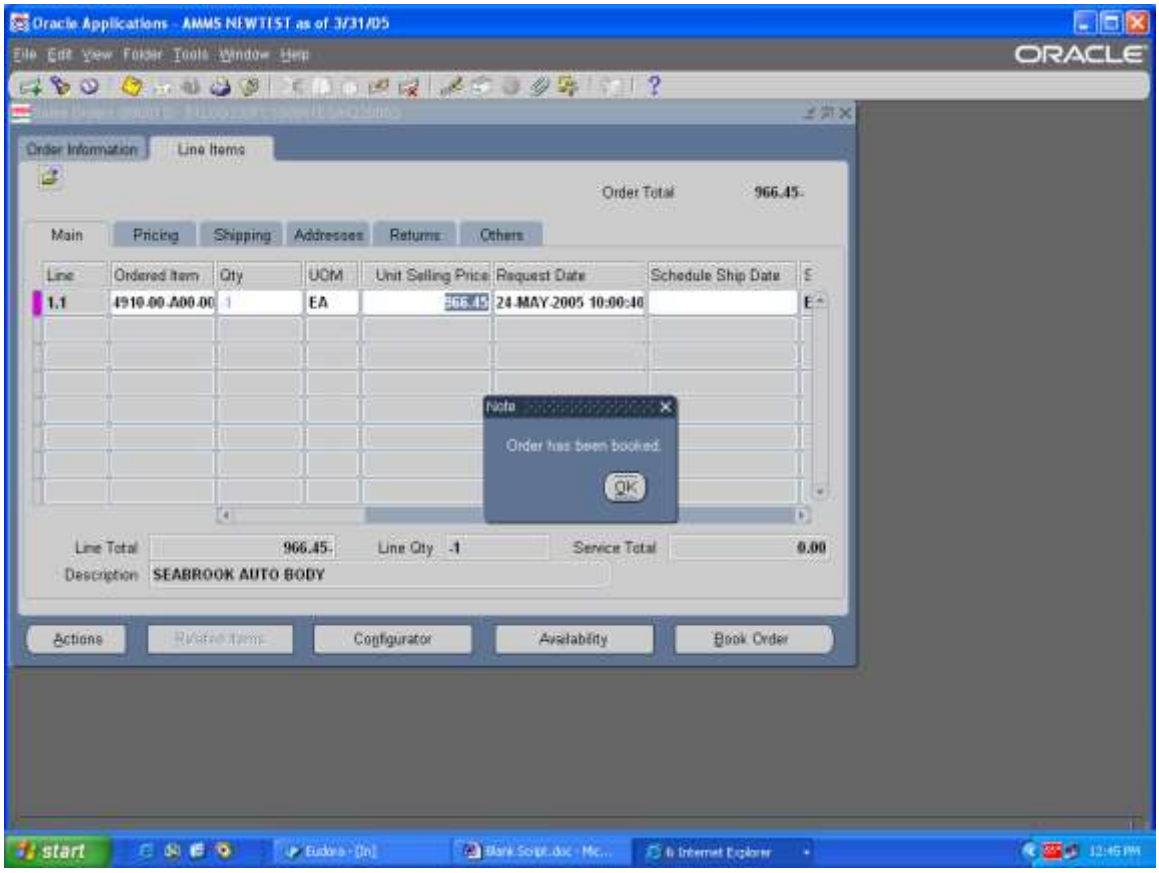
Step Description: Click on the Book Order button at the bottom right of the window

Expected Results: Note window will appear

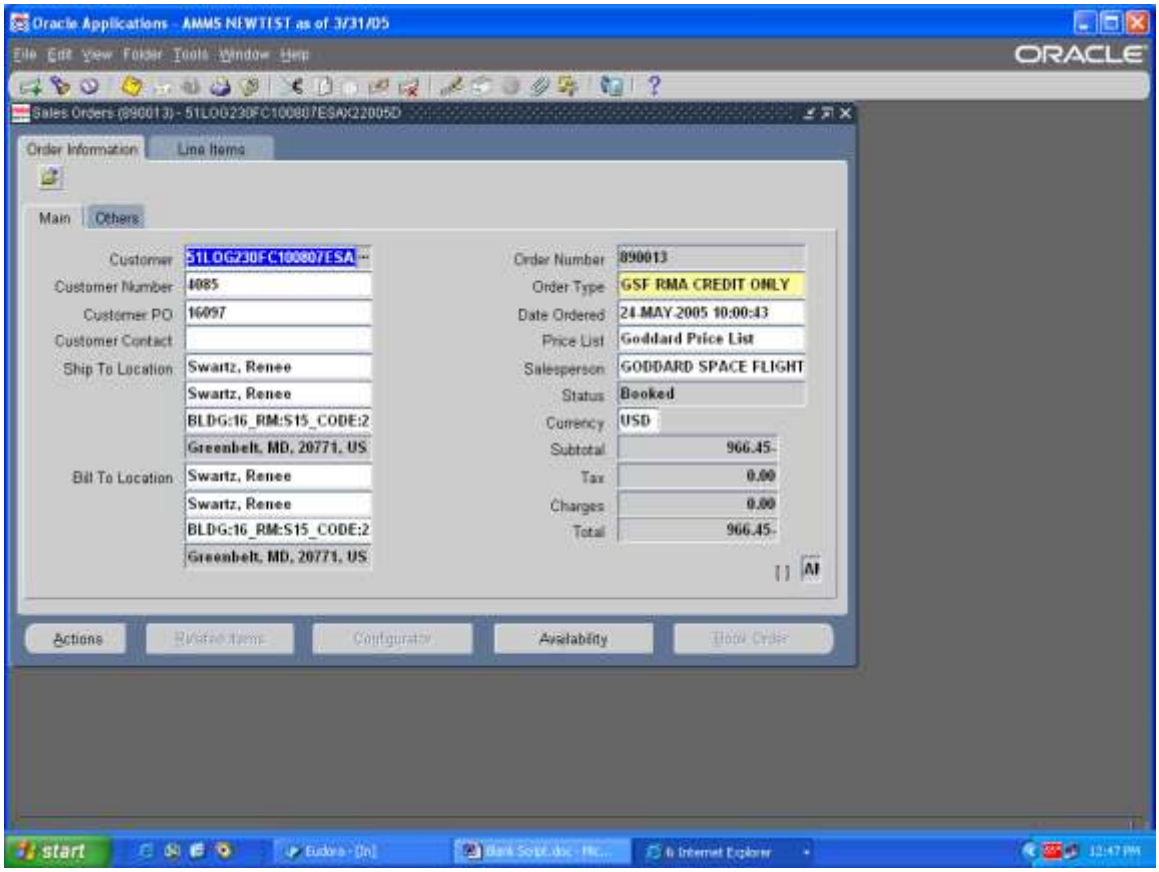


Step Description: Click OK to the Note

Expected Results: Return to the Sales Order information window, status now Booked



Step Description: Order now Booked



<u>Notes: You can only give credit to an order that is closed. You can only credit up to the original amount charged, and original qty charged.</u>

AMMS TRAINING SCRIPT

Review Oracle Sales Orders

Purpose

The purpose of this training script is to show how to look up status on Oracle sales orders.

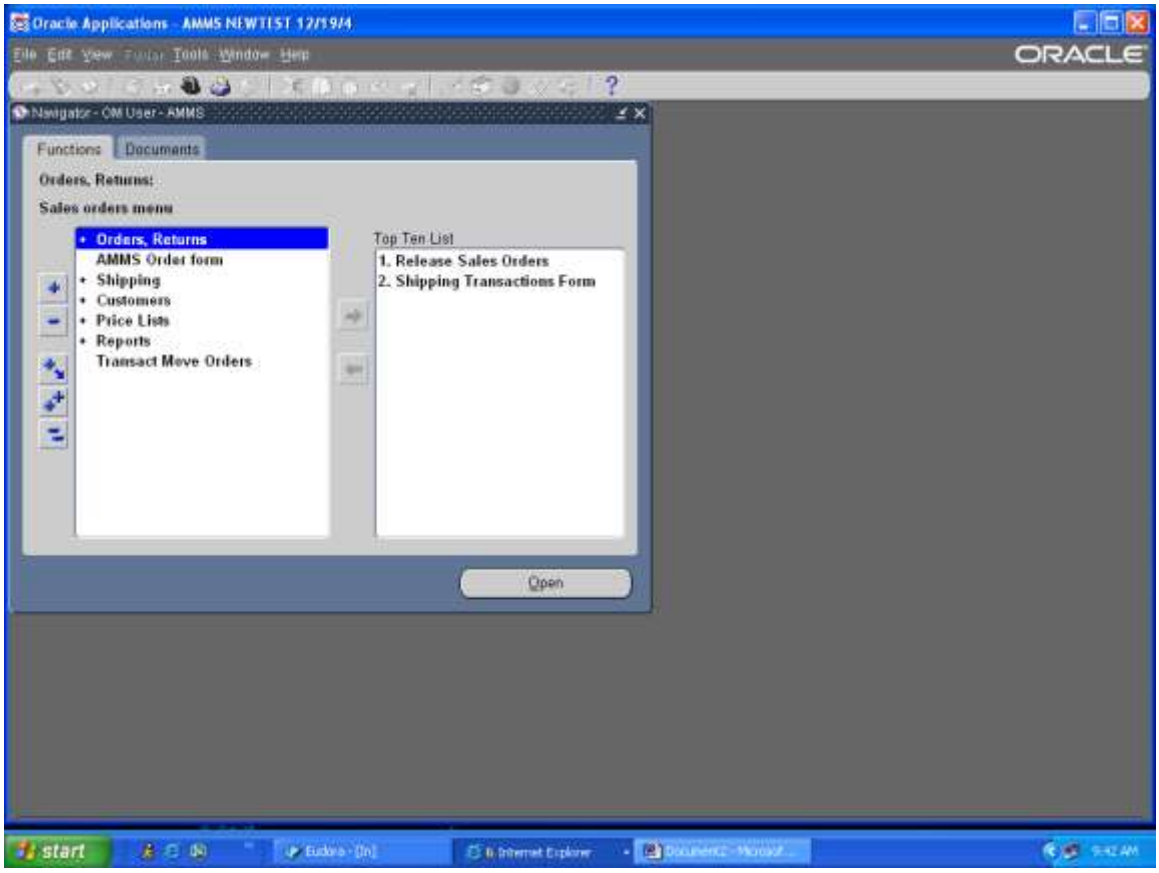
Audience

Material Coordinators and Supply Technicians

Prepared By	Theresa Coulson
Creation Date:	01/05/2004
Document Name	Inquiry on Oracle Sales Orders.doc
Version	2
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Order Management.	

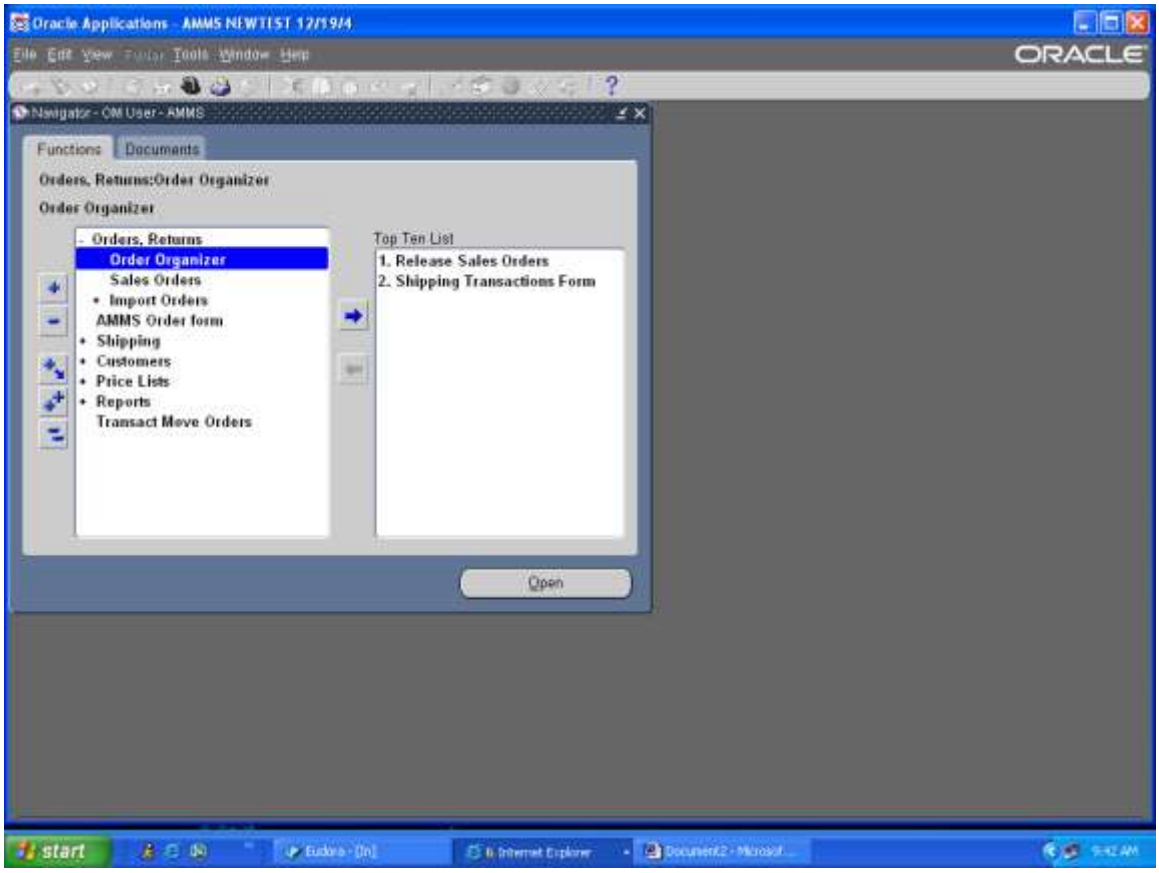
Step Description: Sign onto Oracle and select the OM User AMMS responsibility

Expected Results: The OM User AMMS main menu will appear



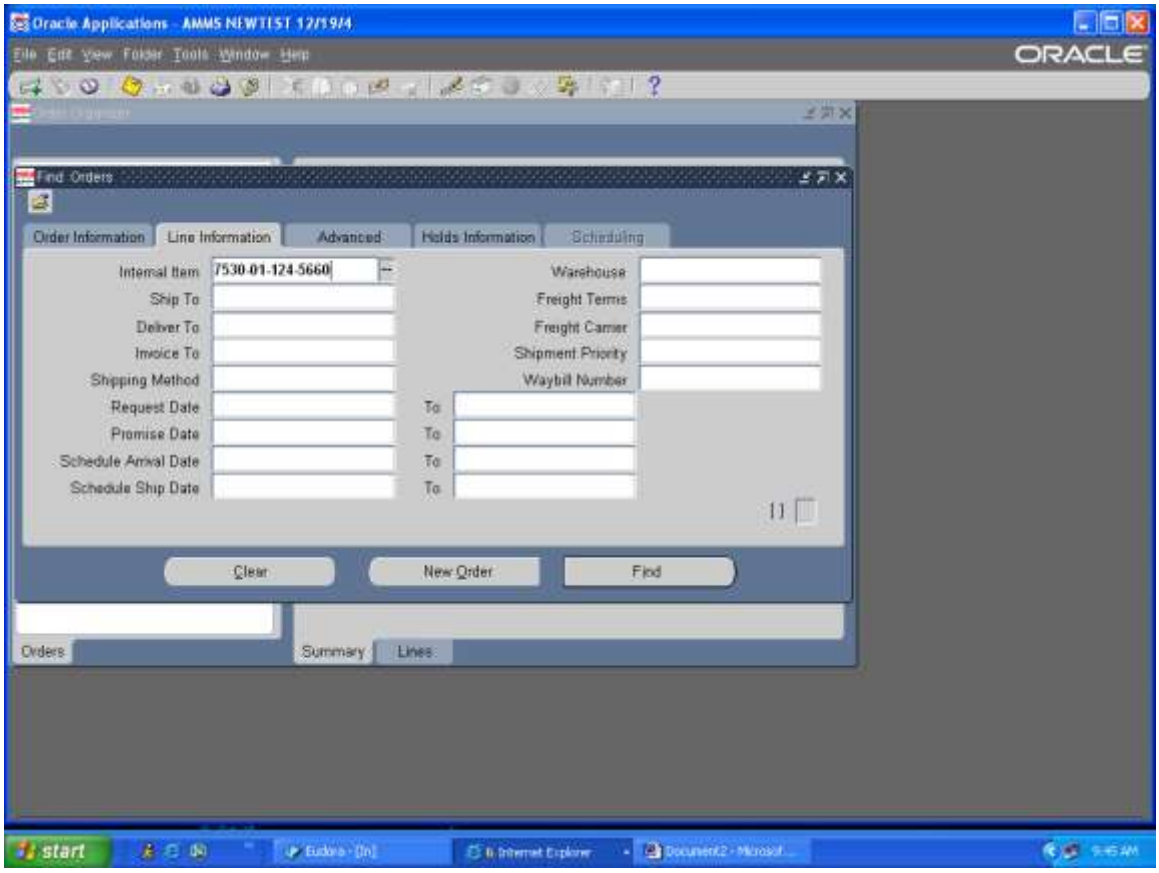
Step Description: Select Order Returns > Order Organizer and click on the Open button.

Expected Results: The Find Orders window will appear



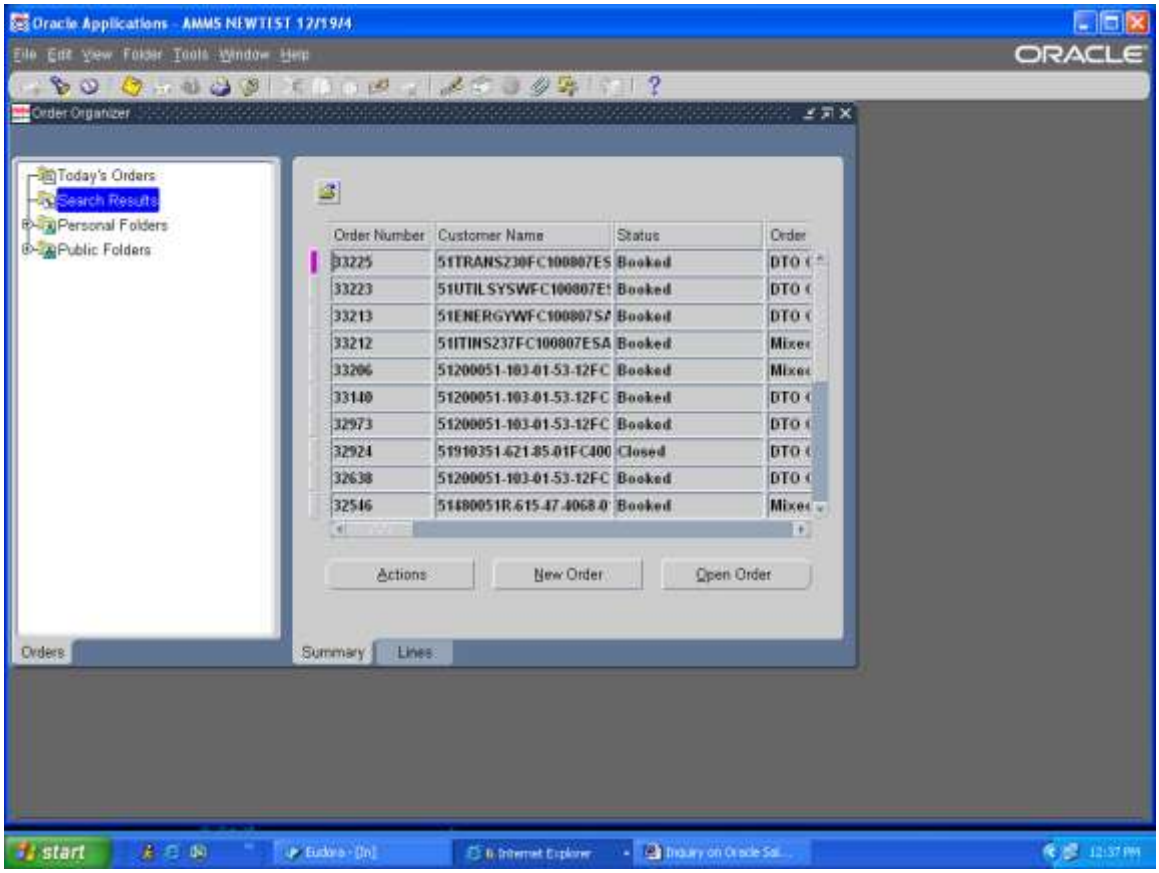
Step Description: If you know the sales order number enter that in the Order Number field. If you know the Customer PO number enter that in the Customer PO field. If you only know the stock number click on the Line Information tab and enter the stock number in the Internal Item field. Click on the Find button.

Expected Results: The Order Organizer window will appear.



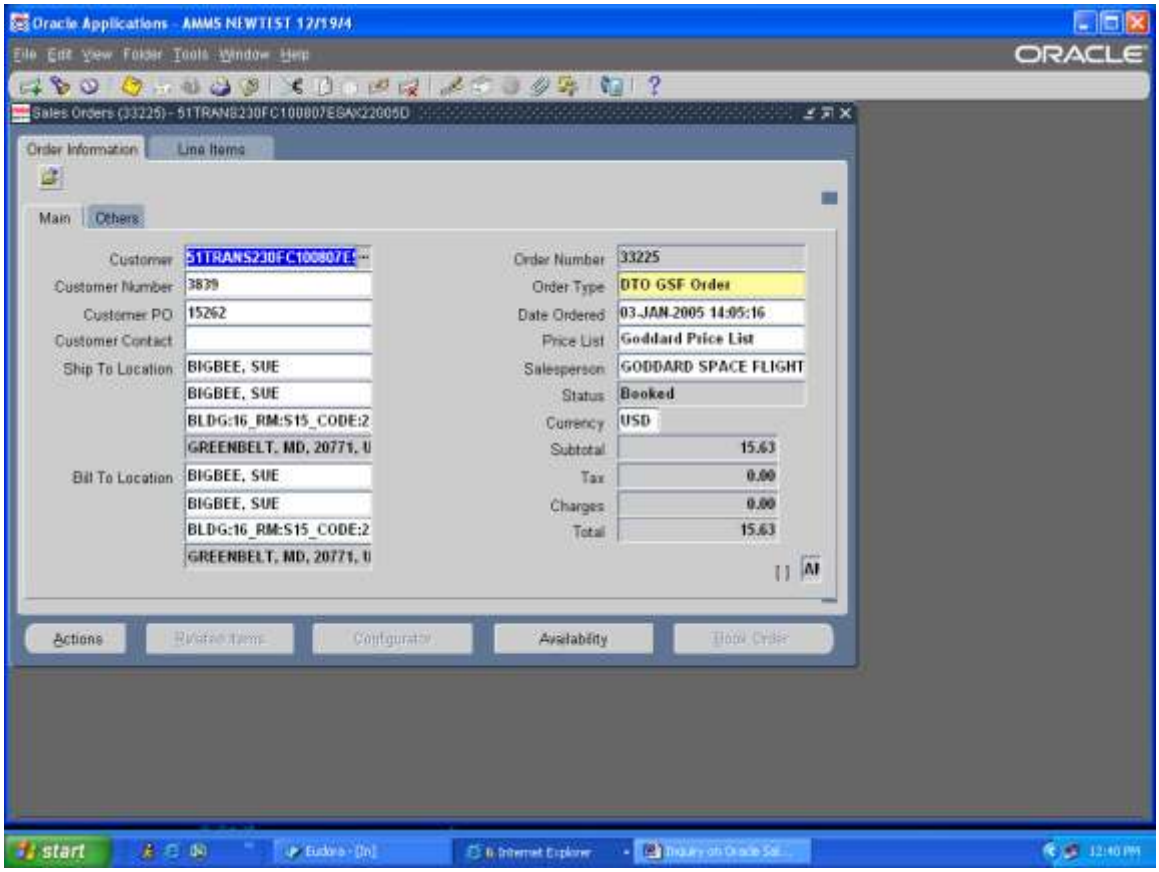
Step Description: Select the order number that you want to look at and click on the Open Order button

Expected Results: The Sales Order window will appear



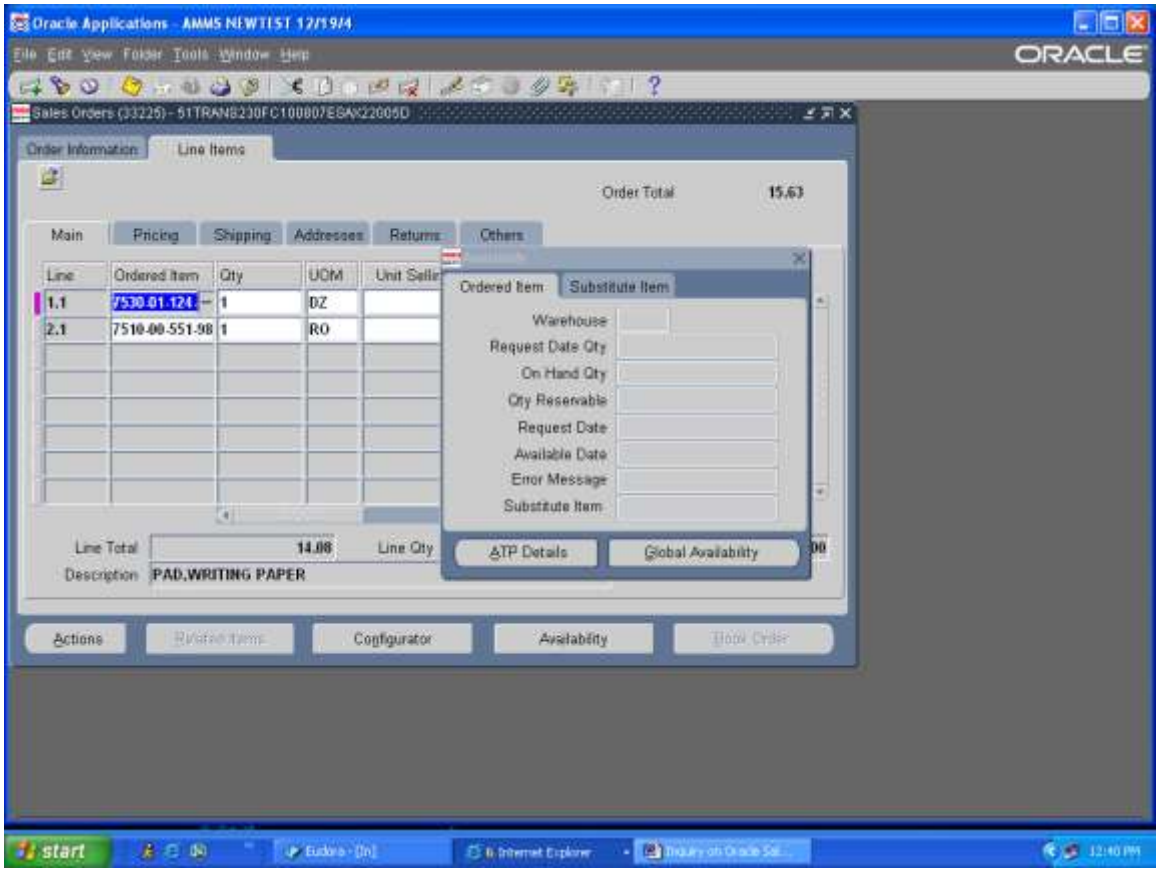
Step Description: The Sales Order window tell you who placed the order what the order type is what the status of the order is. To view specific line items on the order click on the Line Items tab.

Expected Results: You will be at the Line Items window with the Availability window open



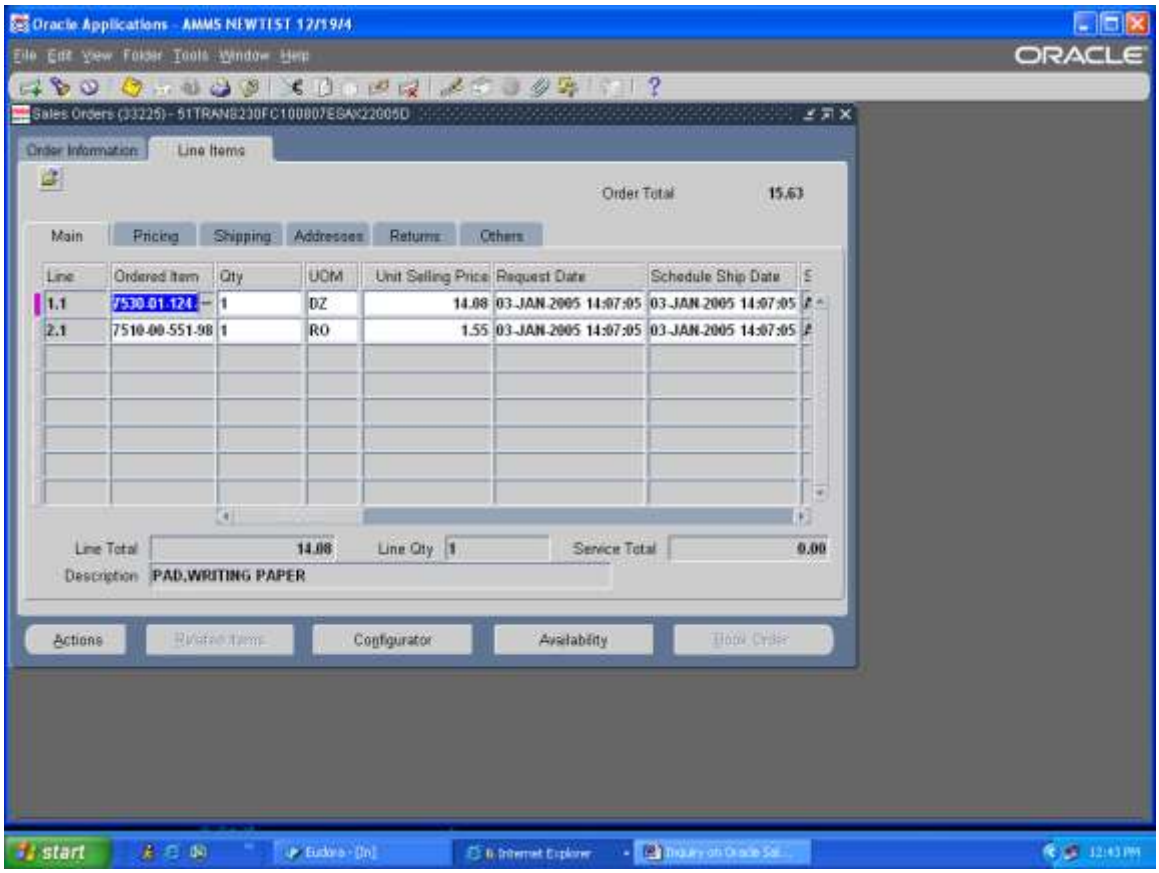
Step Description: Close the Availabilities window

Expected Results: You will be at the Line Items tab



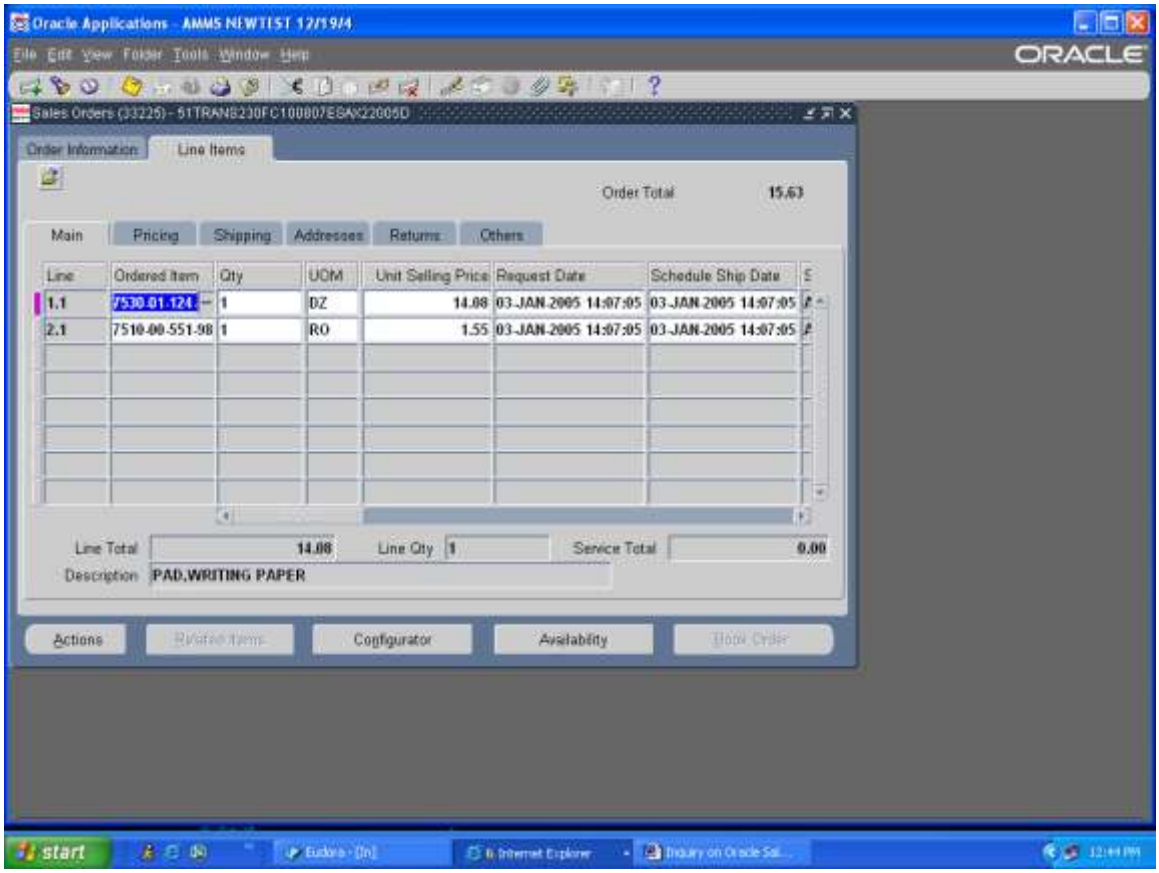
Step Description: Use the scroll bar and you will see detailed information about each line. You will see the quantity, unit of measure, price and status. Lines with a status of Awaiting Receipt have a purchase requisition associated.

Expected Results: You will see all available information



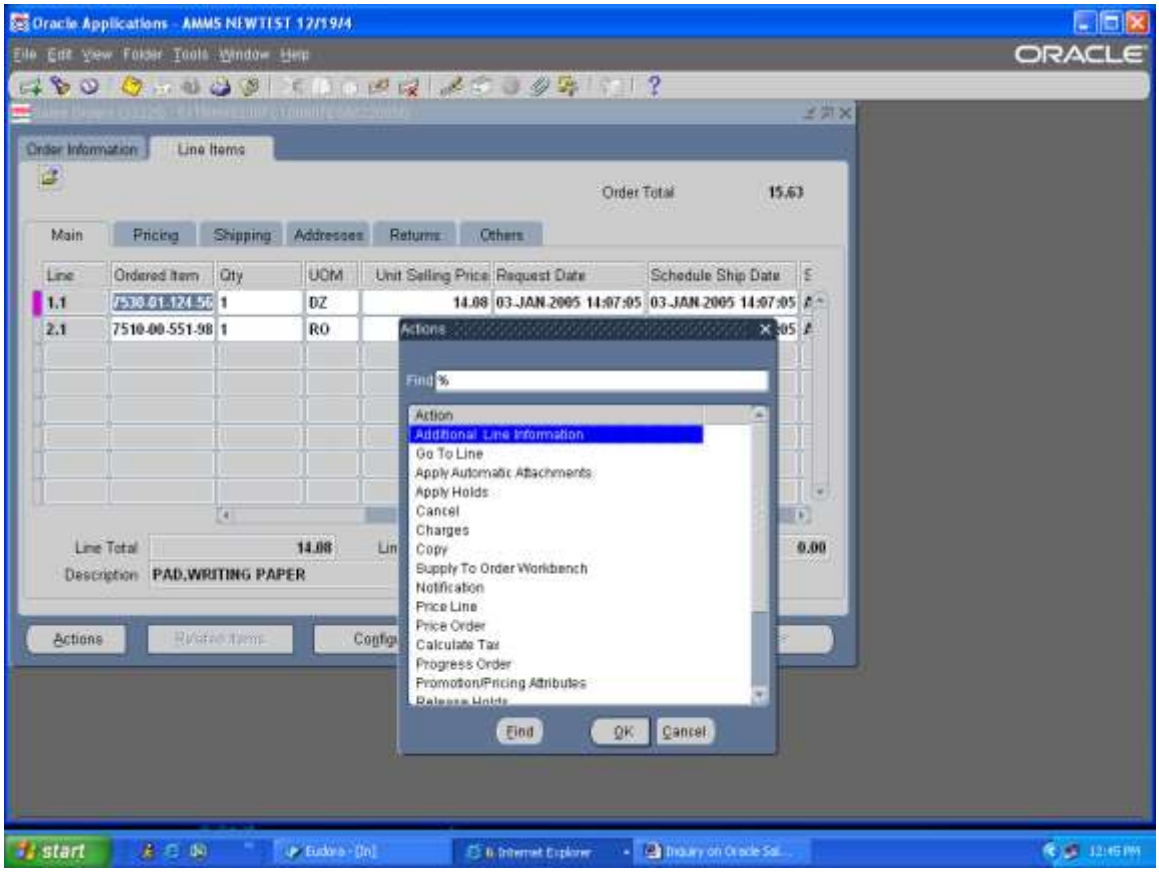
Step Description: For items with status of Awaiting Receipt to see the associated purchasing information click on the Actions button at the bottom left of the screen.

Expected Results: A list of Action will appear



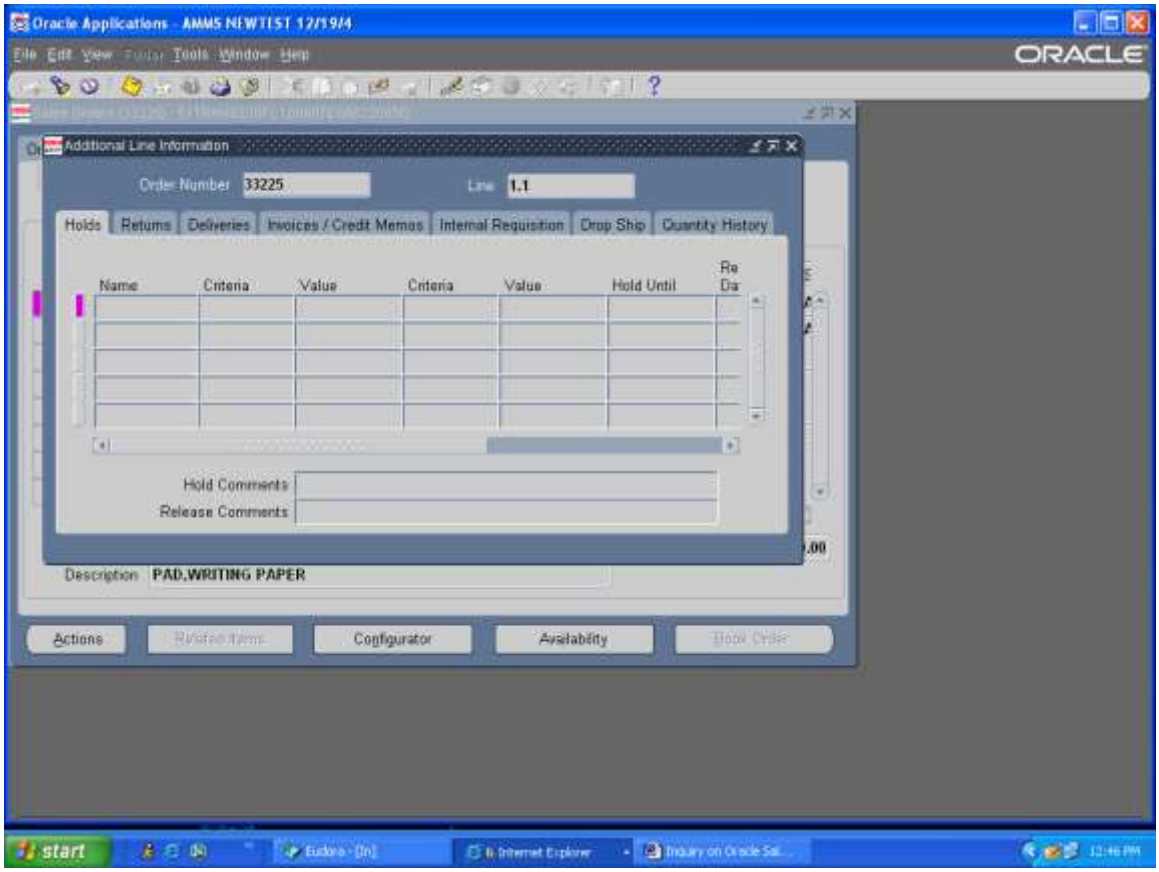
Step Description: Select Additional Line Information from the list and click OK

Expected Results: The Additional Lines Information window will appear

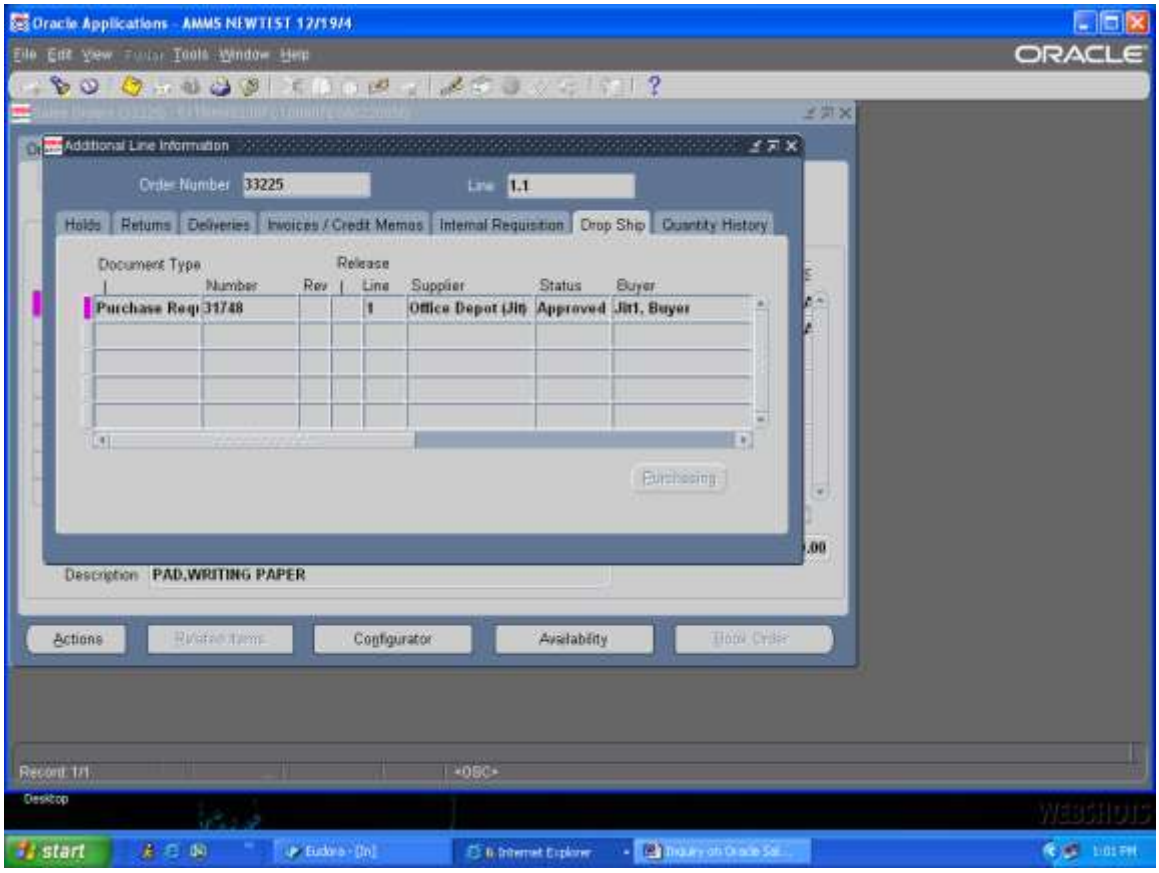


Step Description: Click on the Dropship tab

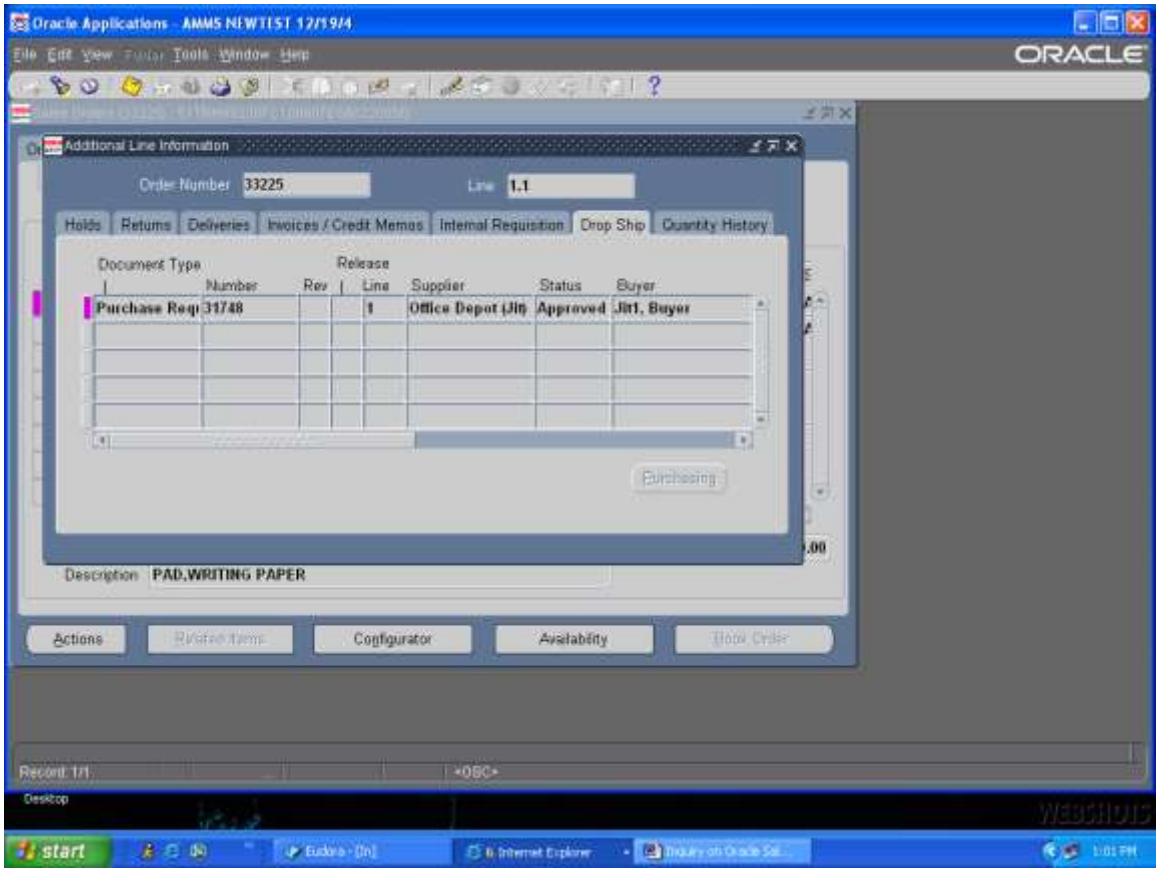
Expected Results: The Dropship tab will appear



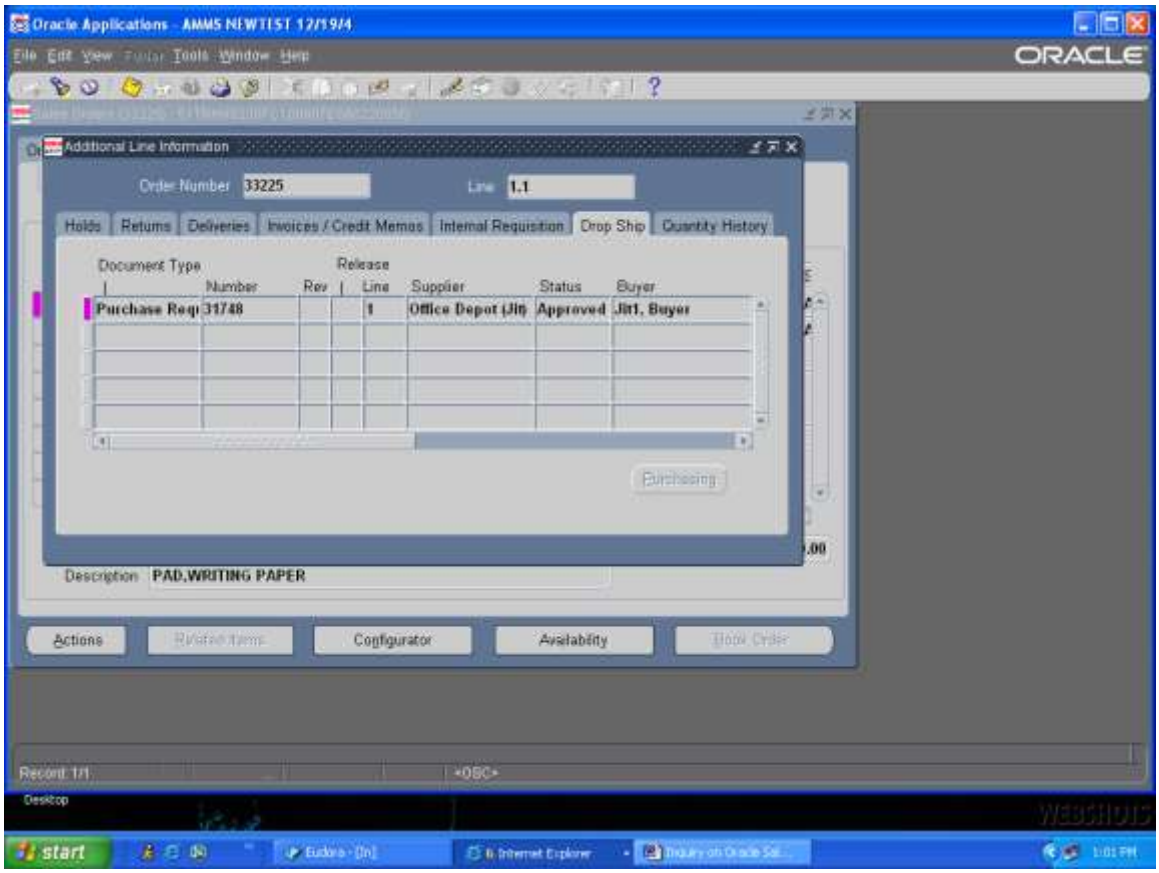
Step Description: The Dropship tab will give you multiple information. In the Document Type it will tell you if it is a Purchasing Requisition, a Purchase Order, or a Blanket Release.



Step Description: The Number field will tell you the Purchasing Requisition number, the Purchase Order Number or the BPA Number.



Step Description: If the type is BPA you will see the Release number. You will also see the Supplier, the status of the PO and who the Buyer is.



Notes:

Here are the statuses that you may see of sales order lines and there meanings:

Awaiting Shipping- there is stock in the warehouse and the item will be picked and shipped

Awaiting Receipt- this is a DTO order and there is a purchasing requisition or purchase order associated

Picked: Pick slip has generated in the warehouse for material to be pulled

Partial Pick: Pick slip for partial qty has generated in the warehouse for material to be pulled

Cancelled: Sales Order line has been cancelled

Closed: Sales order line has been closed, material shipped to customer

AMMS TRAINING SCRIPT

Processing a "Walk Thru"

Purpose

The purpose of this training script is to provide instruction to process a customer who wants to "walk thru" material to take with them

Audience

Material Coordinators and Supply Technician Leads

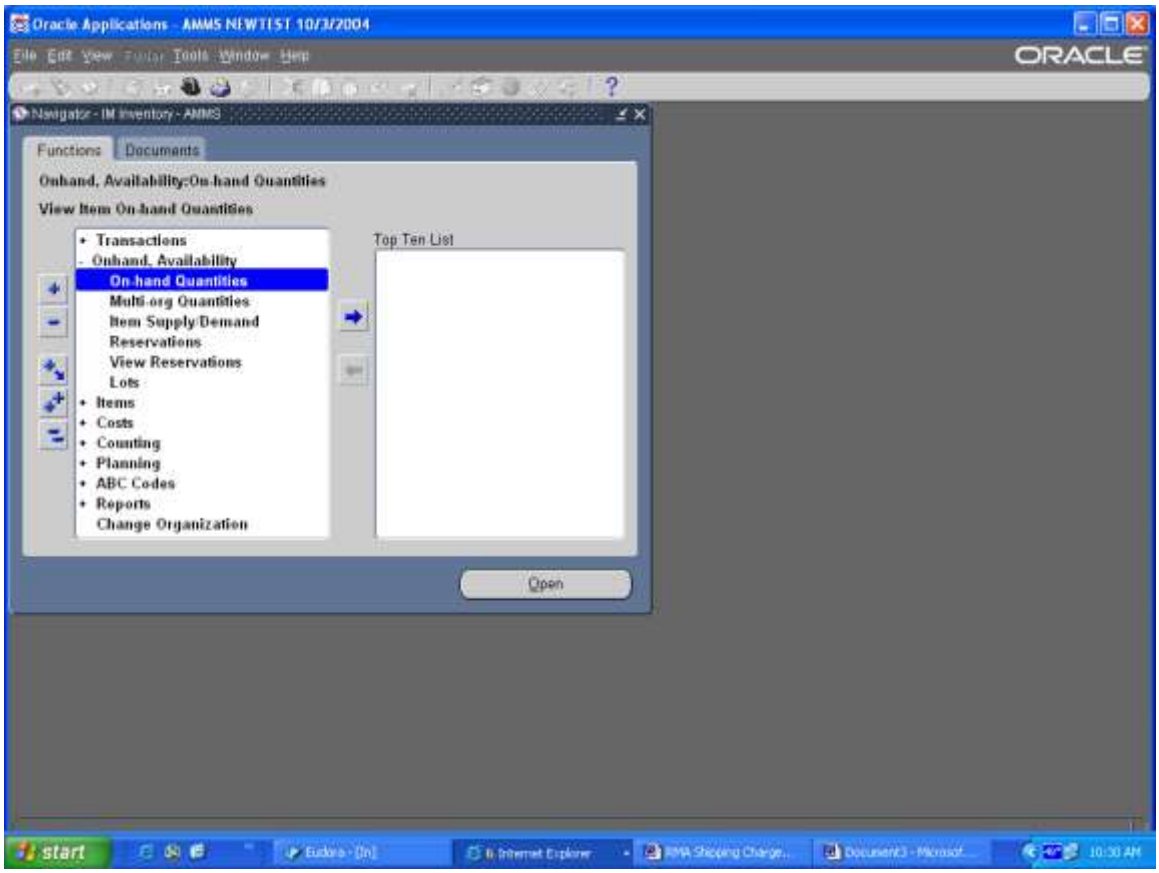
Prepared By	Theresa Coulson
Creation Date:	11/15/2004
Document Name	Processing a Walk Thru.doc
Version	2
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Order Management.	

Step Description: Sign onto Oracle and select the IM Inventory Responsibility

Expected Results/Actions: The IM Inventory Main Menu will appear

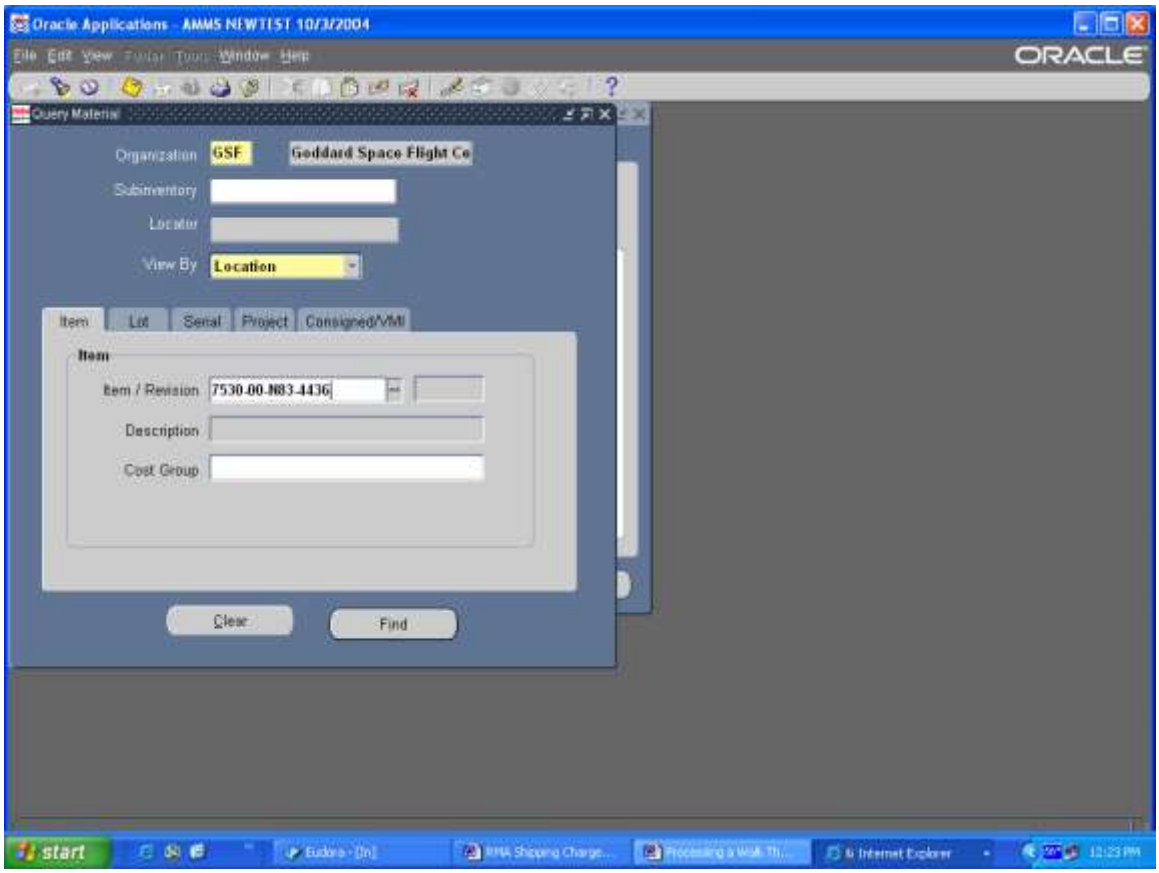
Step Description: Select On Hand Availability > On Hand Quantities, and select the appropriate Organization (GSF or WFF)

Expected Results: The Query Material form will appear



Step Description: Enter the Item Number (stock number) in the Item / Revision field and click on the Find Button.

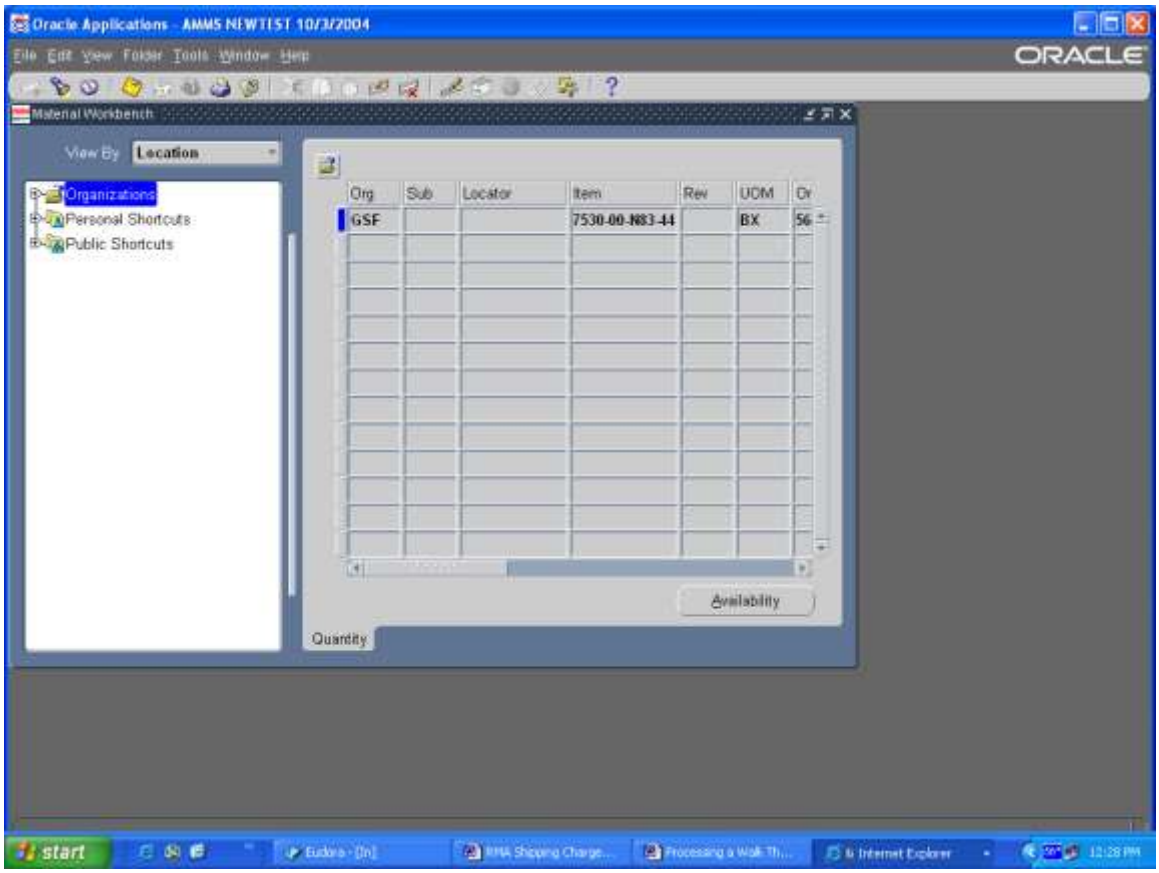
Expected Results/Actions: The field is populated and the Material Workbench form opens.



You are checking to make sure that there is stock on hand before processing the Walk Thru.

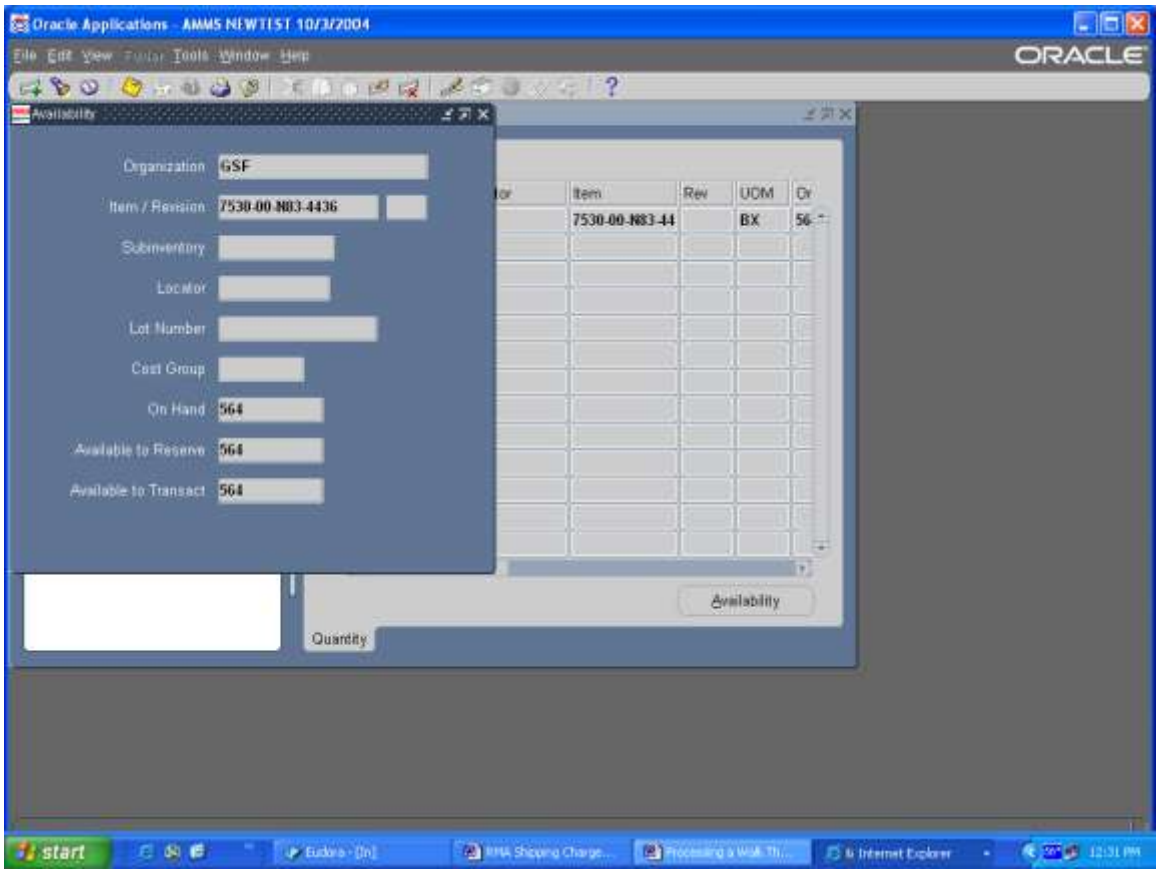
Step Description: Click on the Availability Button at the bottom right of the screen

Expected Results: The Availability Window will appear.



Step Description: Look at the Availability Window this will tell you how many you have On Hand, Available to Reserve, and Available to Transact.

Expected Results/Actions: You are verifying that the qty that is needed by the customer is available.



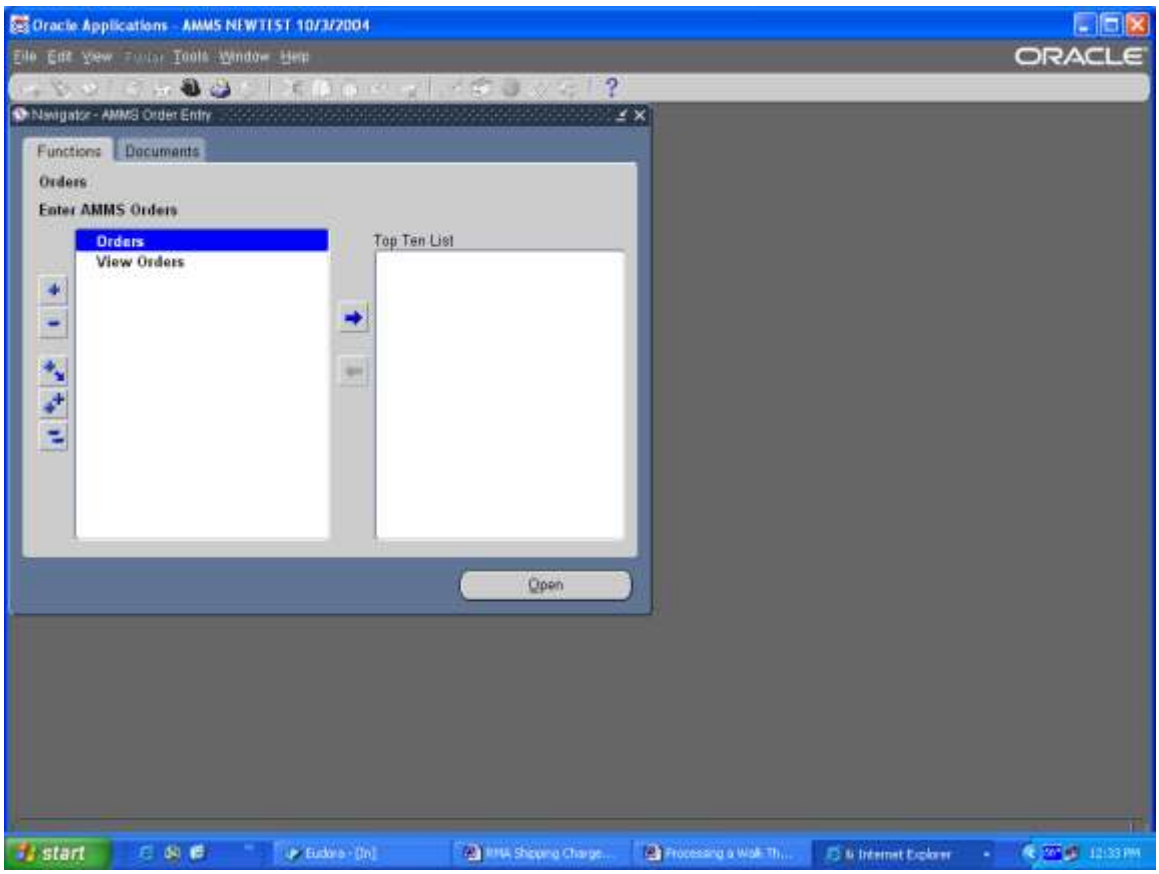
If you have qty available you can continue and process the Walk Thu.

Step Description: Close all windows and change responsibilities to AMMS Order Entry

Expected Results/Actions: The AMMS Order Entry main menu will appear.

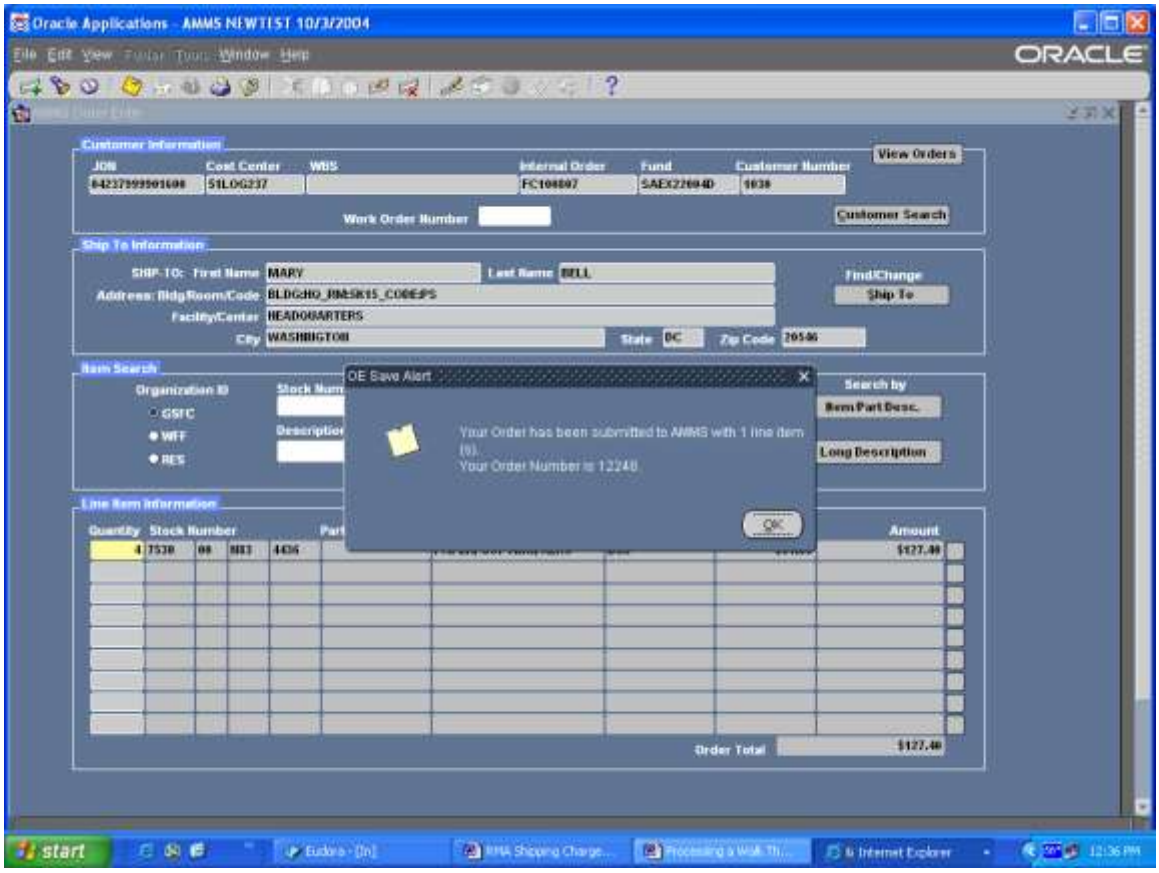
Step Description: From the AMMS Order Entry main menu select Orders and click on the Open button

Expected Results/Actions: The AMMS Order Entry Screen will appear.



Step Description: Enter the customer WBS/JON information, follow all steps for entering the customers order and save the transactions.

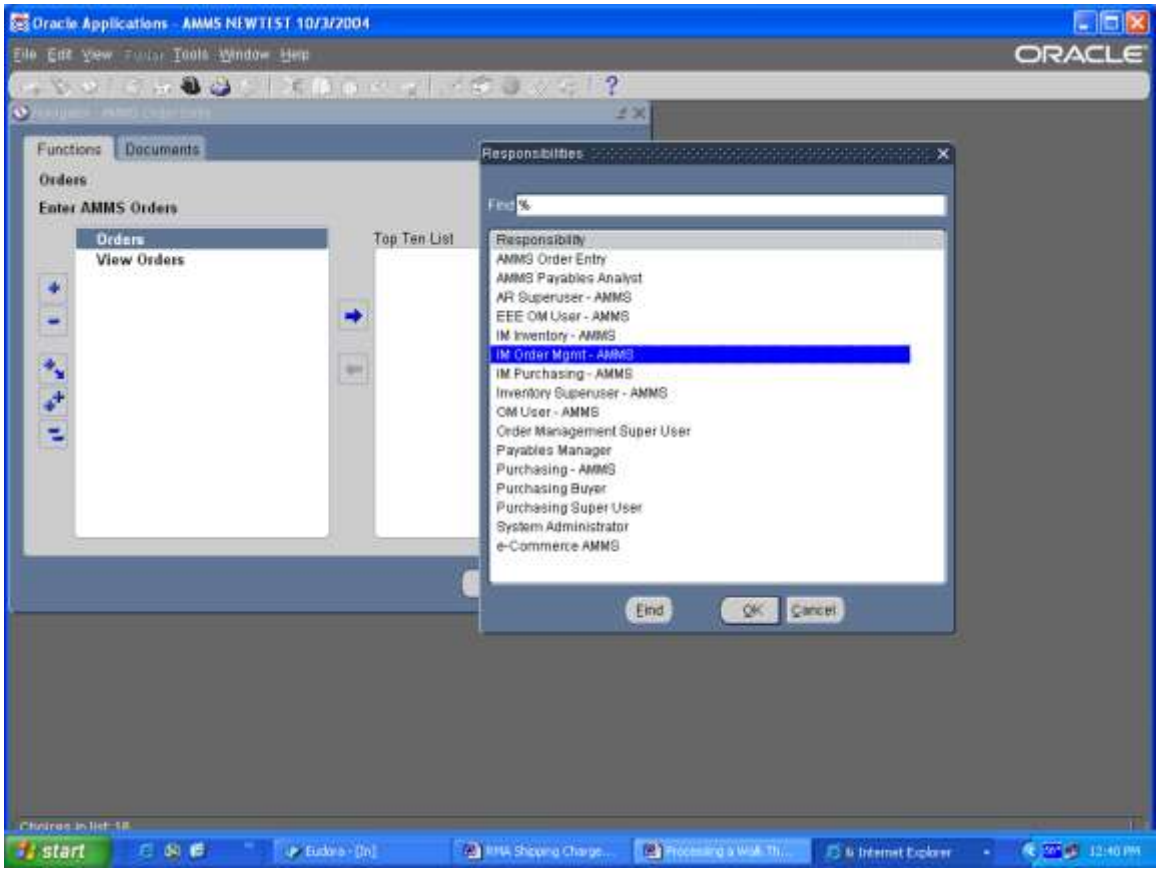
Expected Results/Actions: You will receive an OE Save Alert with your Order Number, write this order number on the walk thru paperwork, you will needed if for future reference.



Once you have saved the order contact Theresa Coulson, Order Import needs to be run, and NO ONE other than a system person should run this job. Theresa Coulson will run Order Import and tell you when it has completed.

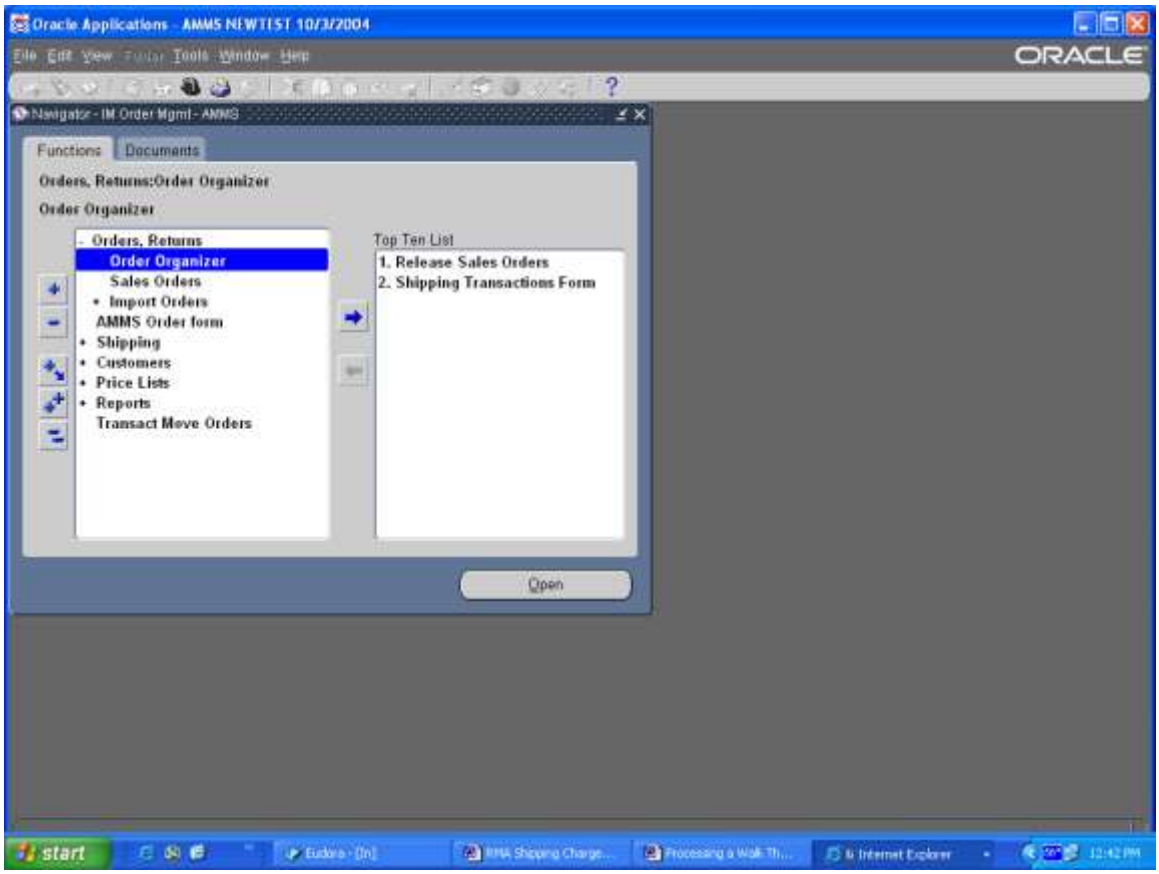
Step Description: Once Order Import has completed change responsibilities to IM Order Mgmt- AMMS, this is the responsibility to use ONLY when processing a walk thru.

Expected Results/Actions: The IM Order Mgmt-AMMS main menu will appear.



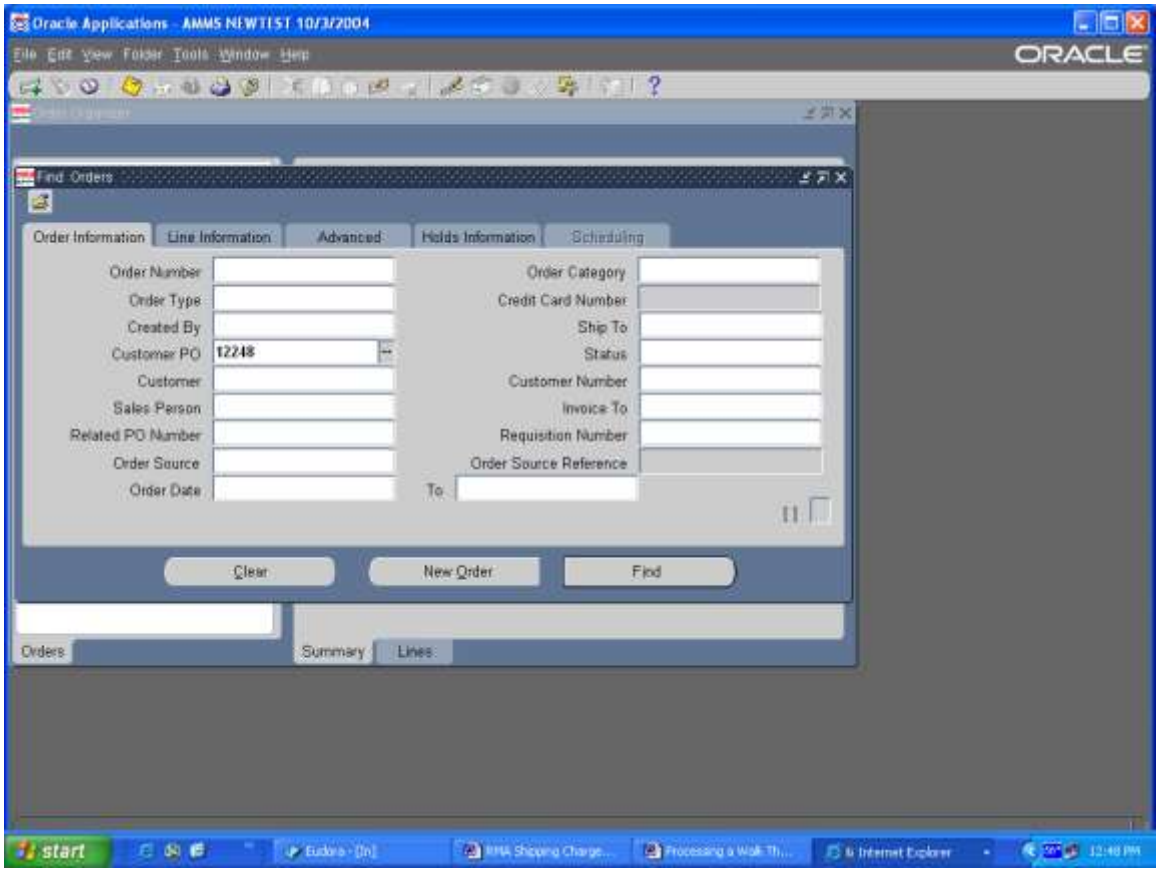
Step Description: Open up Order Returns > Order Organizer

Expected Results/Actions: The Find Orders screen will appear.



Step Description: In the Customer PO field enter the Order Number that you received when you saved entering the customers order, click on the Find button.

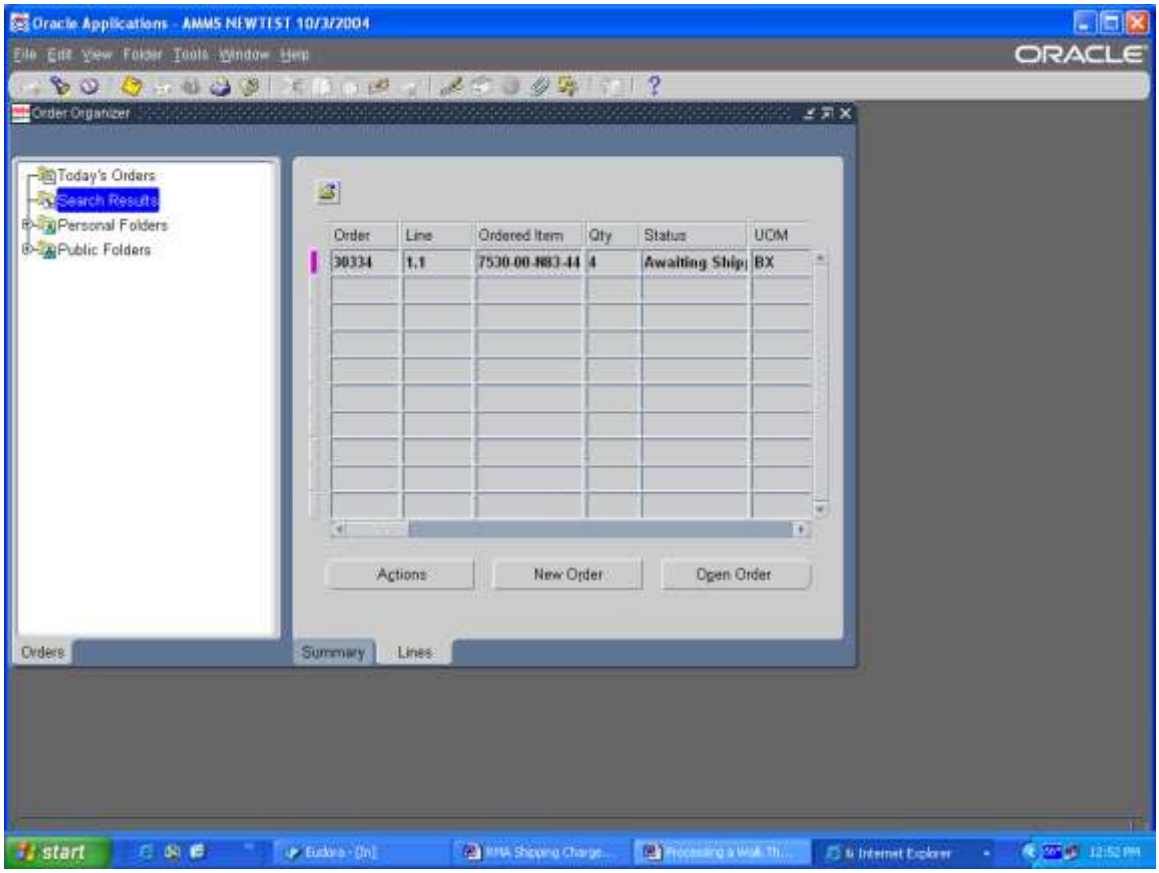
Expected Results/Actions: The Order Organizer screen will appear



Step Description: Write Down the Order Number you will need this for future transactions. Click on the Lines Tab at the bottom of the screen and see if the order status is Awaiting Shipping, this means that the order is ready to be pick released.

Expected Results/Actions: You will see a screen with the order number, the item number the item status, and the qty. This tells you that your walk thru order is ready for pick release.

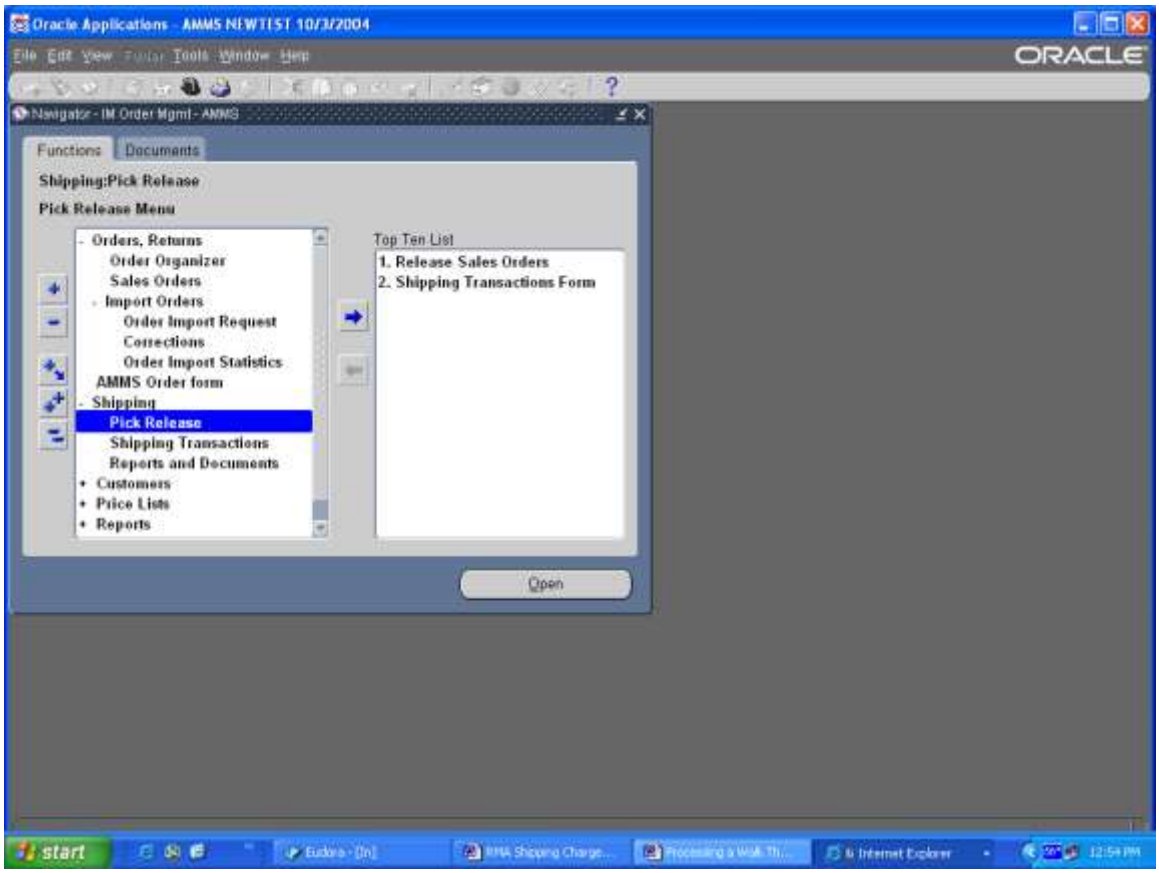
IF THE STATUS IS ANYTHING OTHER THAN AWAITING SHIPPING, CONTACT THERESA COULSON ASAP!



Close all forms and return to the IM Order Mgmt-AMMS main menu.

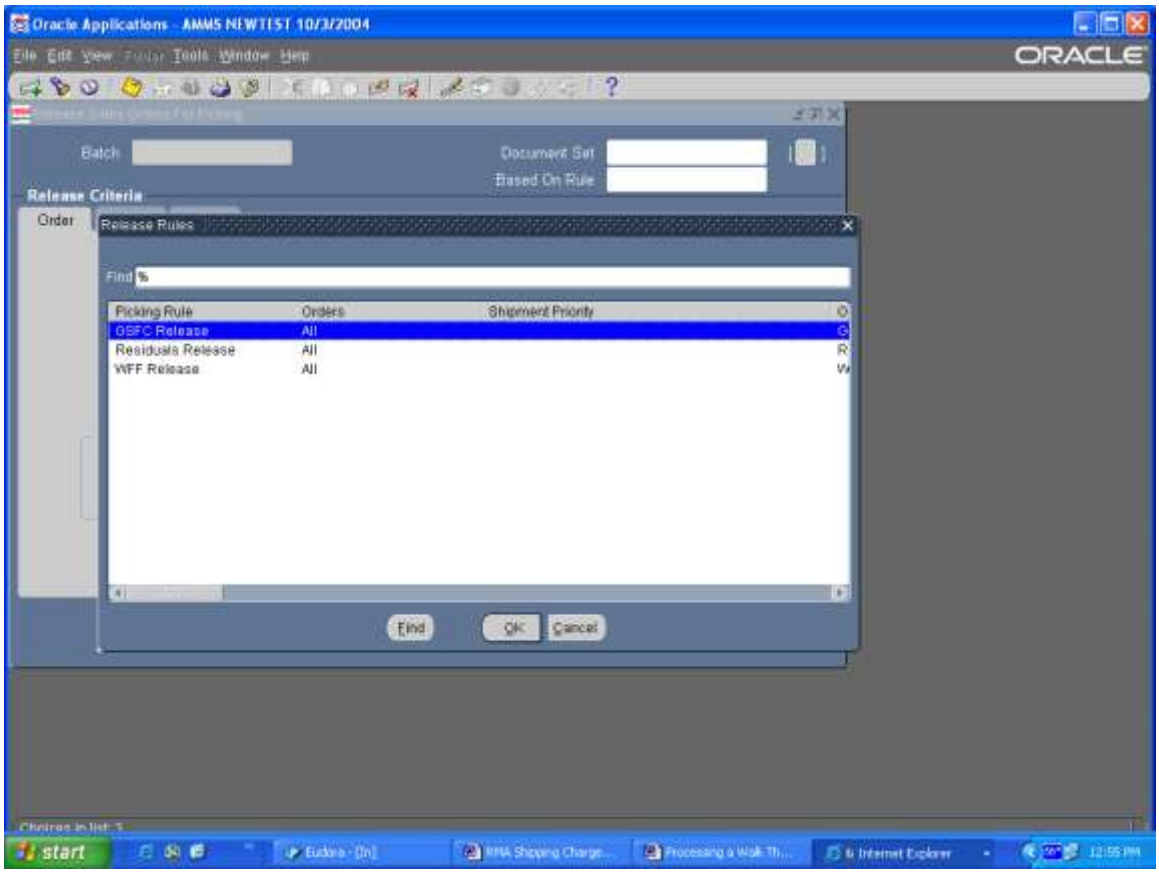
Step Description: From the IM Order Mgmt-AMMS main menu, select Shipping > Pick Release.

Expected Results/Actions: The Release Sales Order for Picking screen will appear.



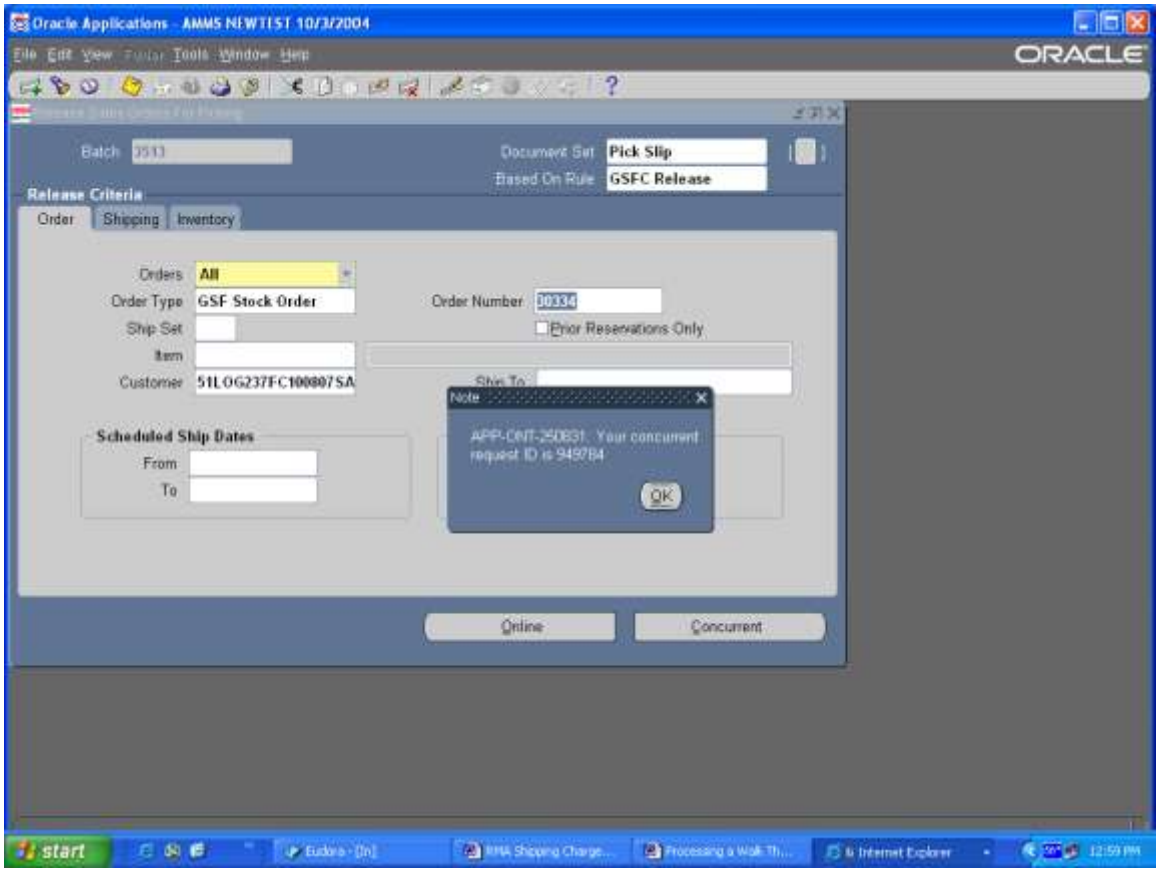
Step Description: In the Based on Rules field click on the List of Values (LOV) and select the appropriate release (GSFC for Goddard and WFF for Wallops), click on and the field will be populated

Expected Results/Actions: Document Set field and Based on Rules fields are populated.



Step Description: Go to the Order Number field and enter the Sales Order Number, THIS MUST BE ENTERED BEFORE CONTINUEING ON. Once the Sales Order Number is entered click on the Concurrent button

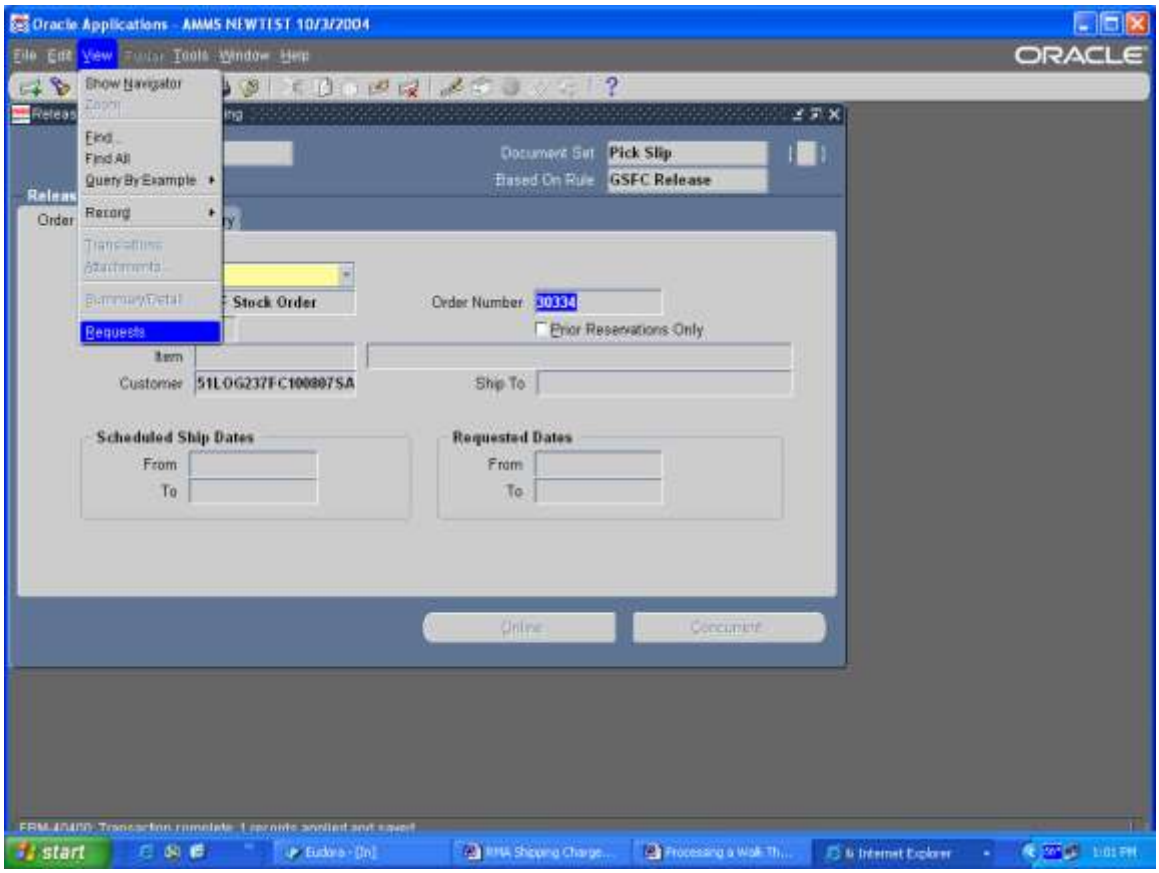
Expected Results/Actions: The field is populated, you get a Batch number and a NOTE with the Concurrent Request ID information.



Click OK to the NOTE. You have completed the Walk Thru process. You will now need to make sure the concurrent job processes to print the pick slip on the printer in the upperwarehouse.

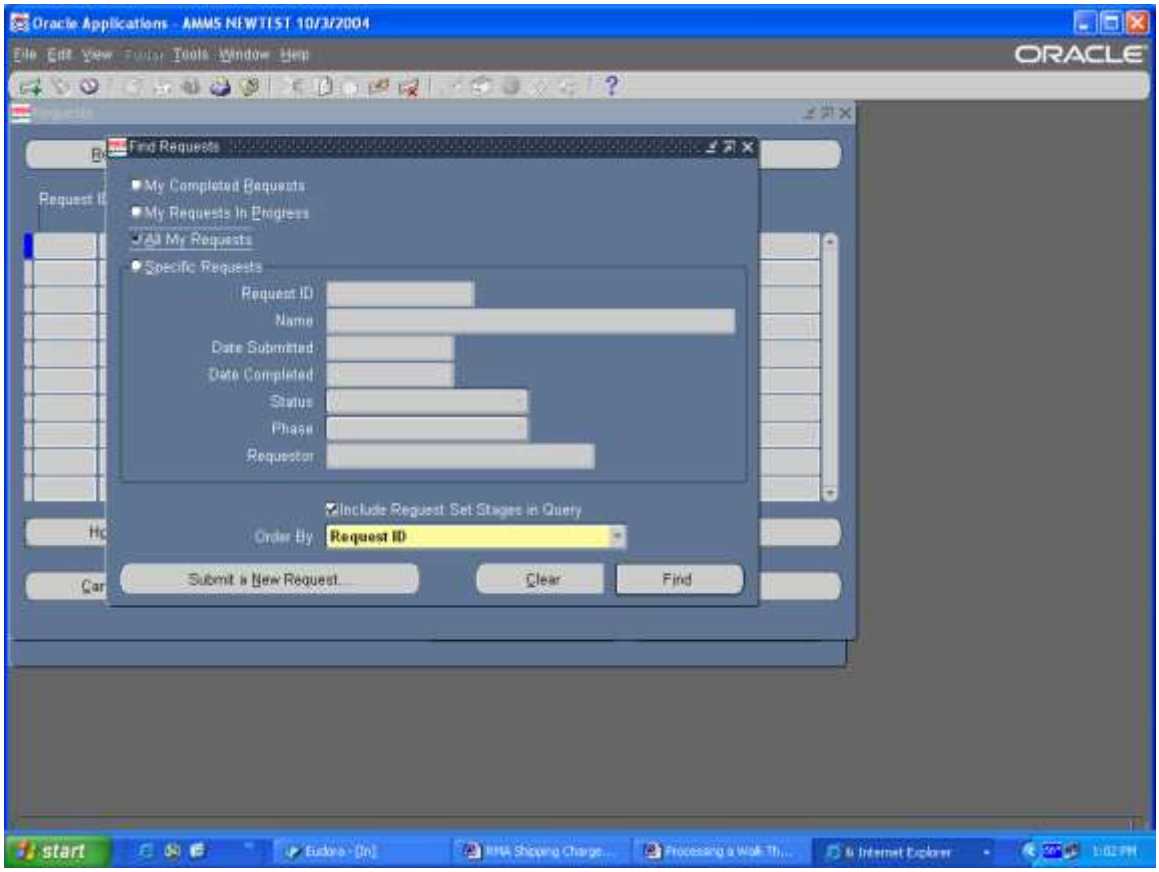
Step Description: From the Oracle Tool Bar select View and then select Requests.

Expected Results: The Find Request window will open



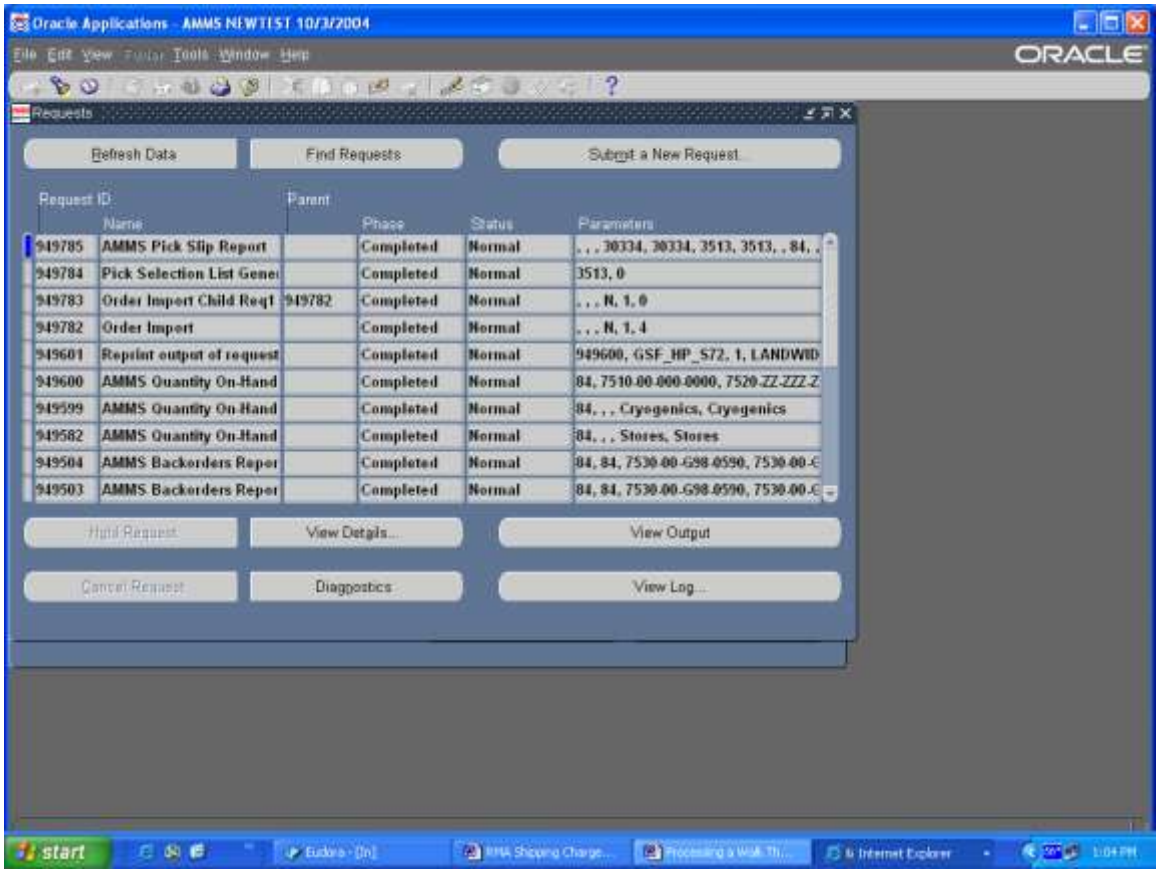
Step Description: Click FIND to see all requests that you have submitted.

Expected Results/Actions: The Request screen will appear.



Step Description: You are looking for 2 concurrent jobs to complete, Pick Selection List Generation and AMMS Pick Slip Report. The Pick Selection List Generation will complete first then the AMMS Pick Slip Report will run.

Expected Results/Actions: All jobs will say Completed Normal



Step Description: Once the AMMS Pick Slip Report has completed click on the View Output button to see the output from the report. This will let you see if a pick slip generated.

Expected Results/Actions: The AMMS Pick Slip Report will appear.

If for some reason there is NO DATA found contact your Lead to trouble shoot the process. If needed contact Theresa Coulson also.

If all is well. Send the customer to the upperwarehouse for pick up of material. You should alert the upperwarehouse of the customer coming up to make sure the customer received quick service.

Process is Complete.

Notes:

Walk Thru can be processed for partial qty's, just follow the same directions, the order will only pick release for the qty that is available. The remaining qty will go on backorder, alert the appropriate Supply Team of the backorder so that they can get material procured.

AMMS TRAINING SCRIPT

Query on Price List

Purpose

The purpose of this training script is to will provide instruction on how to query on the Price List to see if an item already exists on the Price List

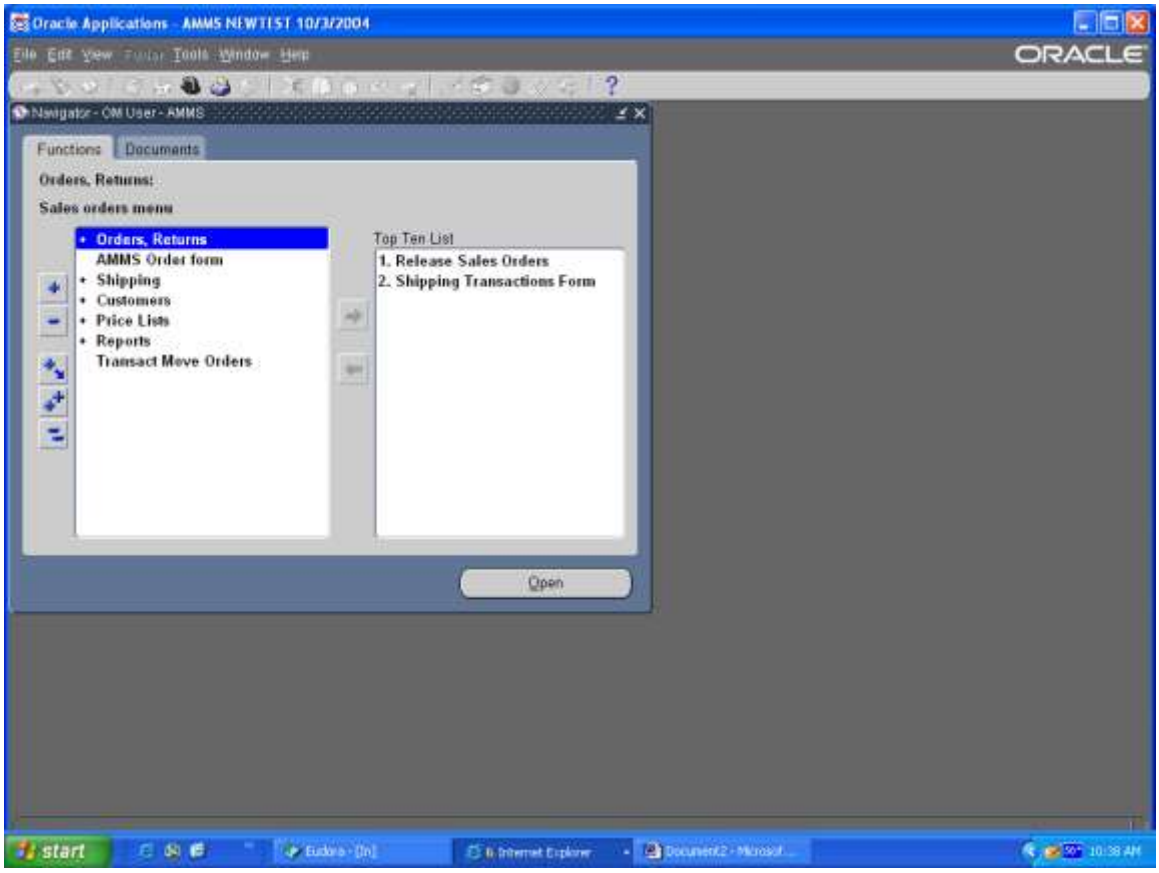
Audience

Material Coordinators and Supply Technician Leads

Prepared By	Theresa Coulson
Creation Date:	11/17/2004
Document Name	Query on Price List.doc
Version	2
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Order Management.	

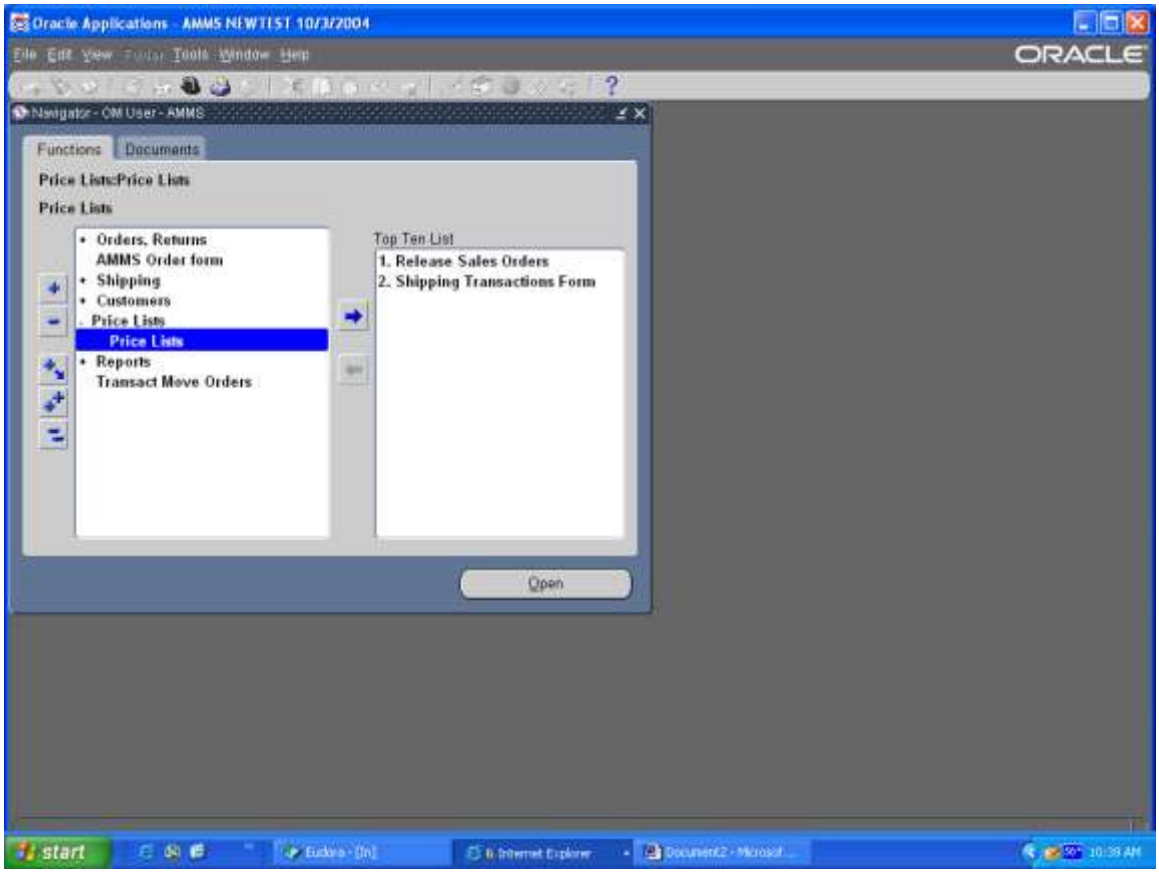
Step Description: Sign onto Oracle and Select OM User responsibility.

Expected Results/Actions: The OM User main menu will appear.



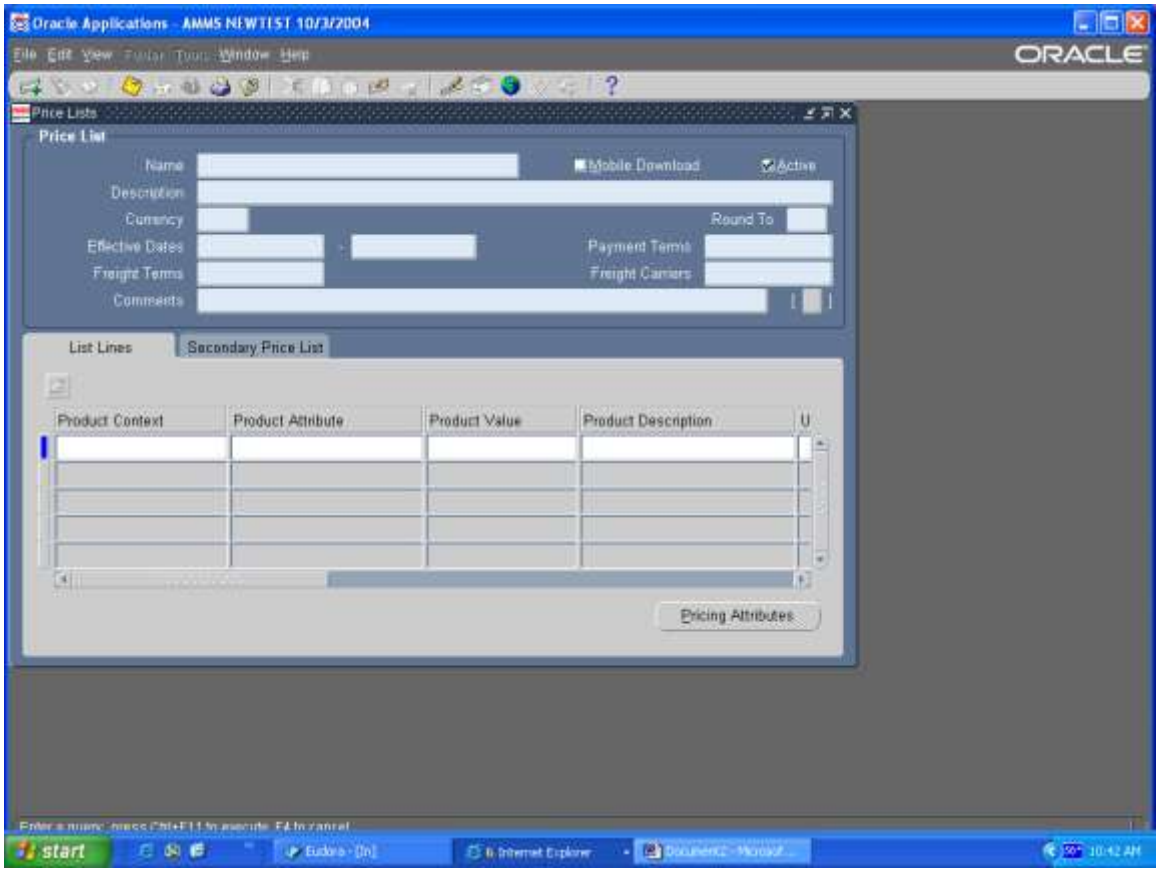
Step Description: Select from the main menu Price Lists > Price Lists and click on the Open button.

Expected Results/Actions: A blank Price List will appear.



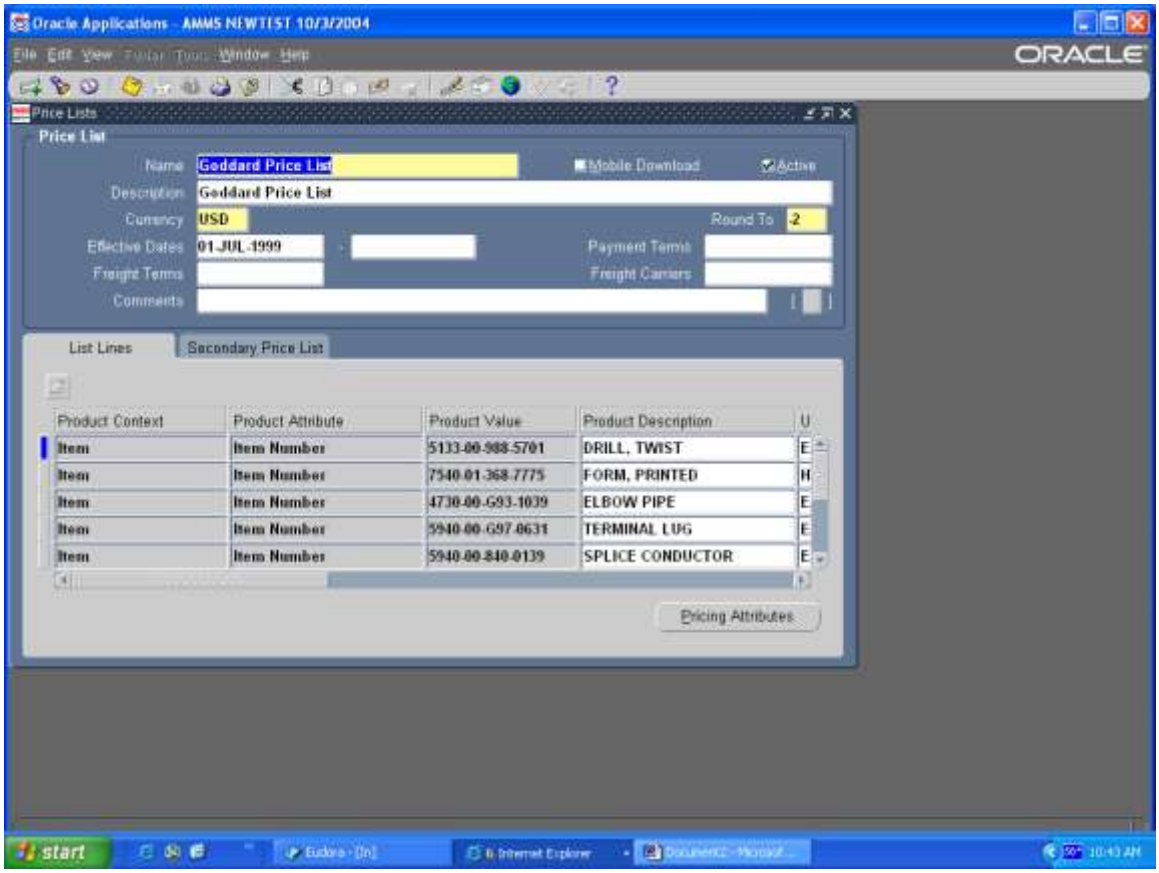
Step Description: Query up the existing Price Lists, on your keyboard press the F11 button.

Expected Results/Actions: This will send the Price List screen into a query mode and turn all fields blue.



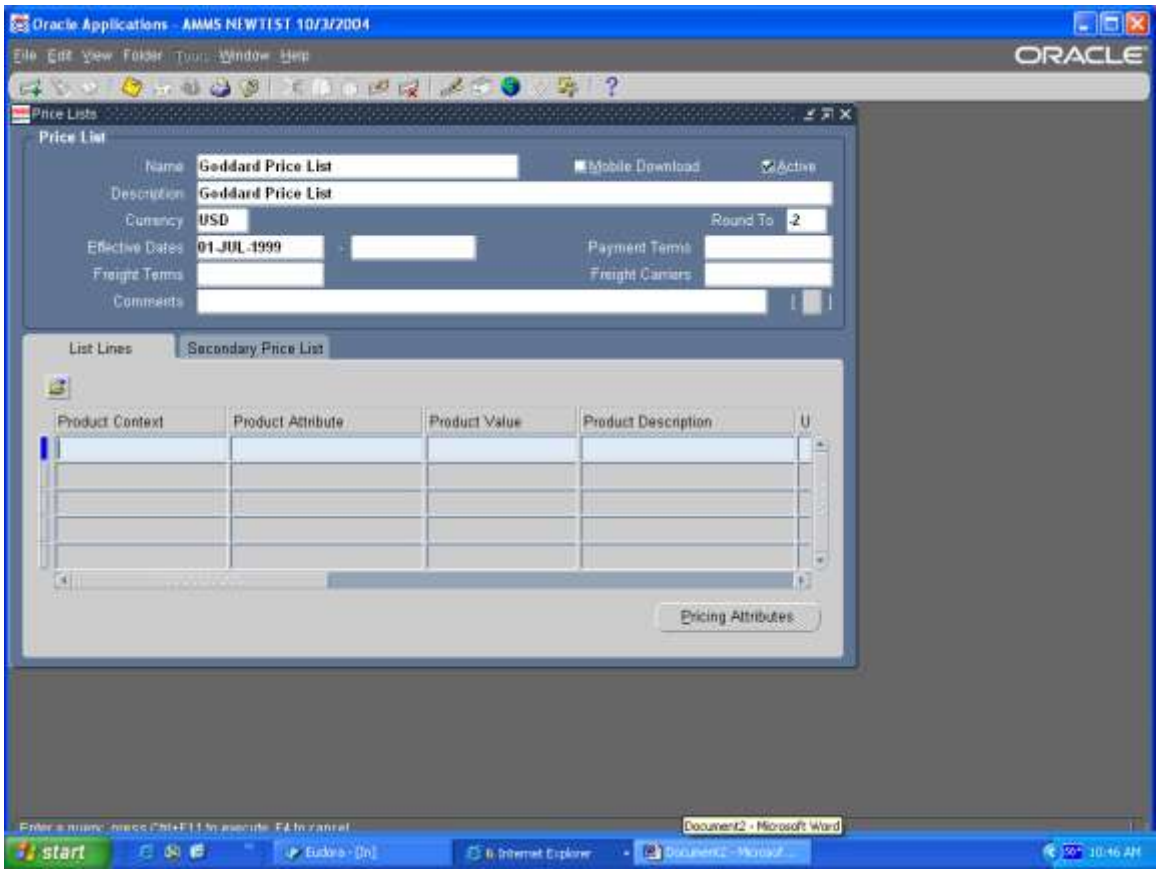
Step Description: End the query by holding down the Ctrl button and pressing the F11 button again.

Expected Results/Actions: The Goddard Price List will appear



Step Description: At the bottom of the Goddard Price List screen place your cursor in the Product Value field, and again send the Goddard Price List into a query mode by pressing down the F11 button

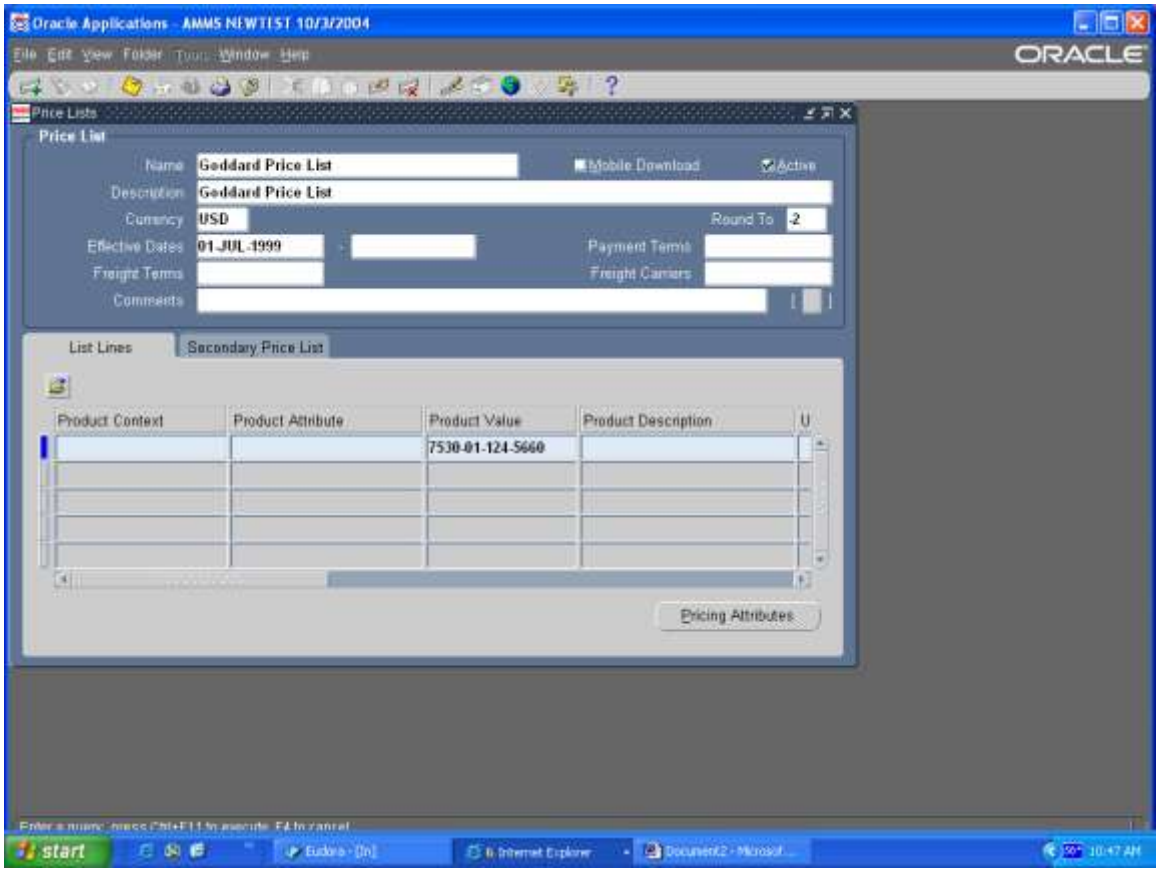
Expected Results/Actions: All of the items will disappear from the List Lines tab



YOU MUST CLICK IN THE PRODUCT VALUE FIELD BEFORE YOU START YOUR QUERY.

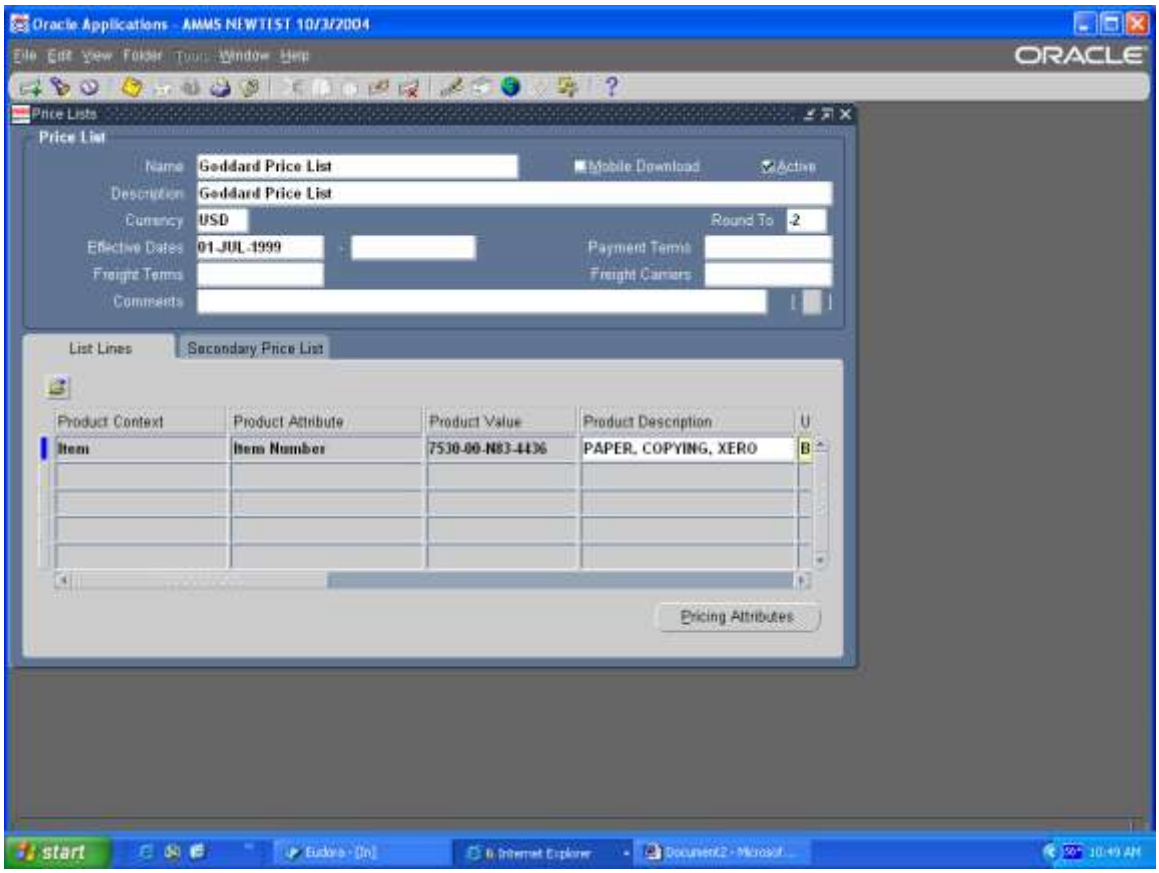
Step Description: In the Product Value field enter the item number (stock number)

Expected Results/Actions: Field will be populated



Step Description: End the query again by holding down the Ctrl button and pressing the F11 button

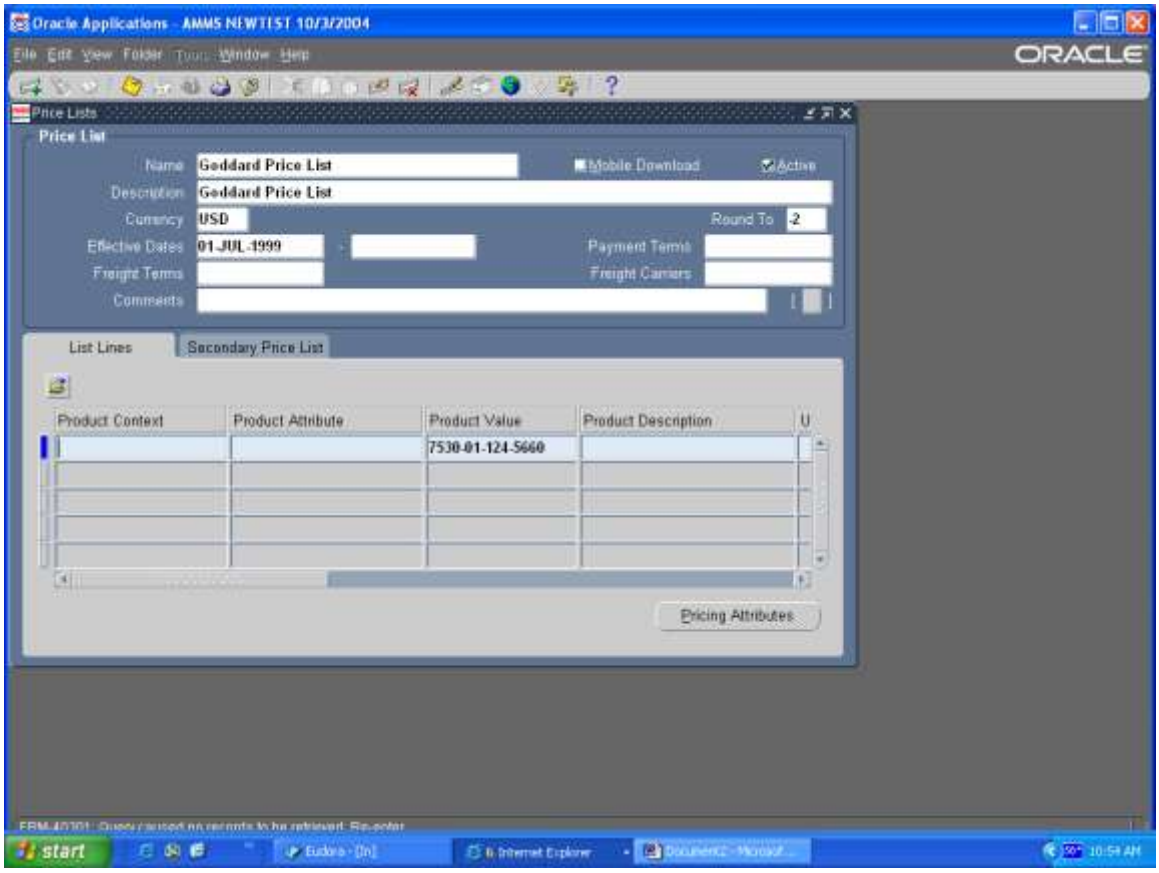
Step Description: If the item exists already on the price list the information will be populated



HOWEVER…….

Step Description: End the query by holding down the Ctrl button and pressing the F11 button

Expected Results/Actions: NO DATA is returned, and you receive a message at the bottom of the screen Query caused no records to be retrieved. This means the item is NOT on the Price List and can be added.



Process completed.

Notes: To add items that are not on the Price List, see AMMS Training Script, Adding Items to Price Lists.

AMMS TRAINING SCRIPT

Requested For Field Copy Order

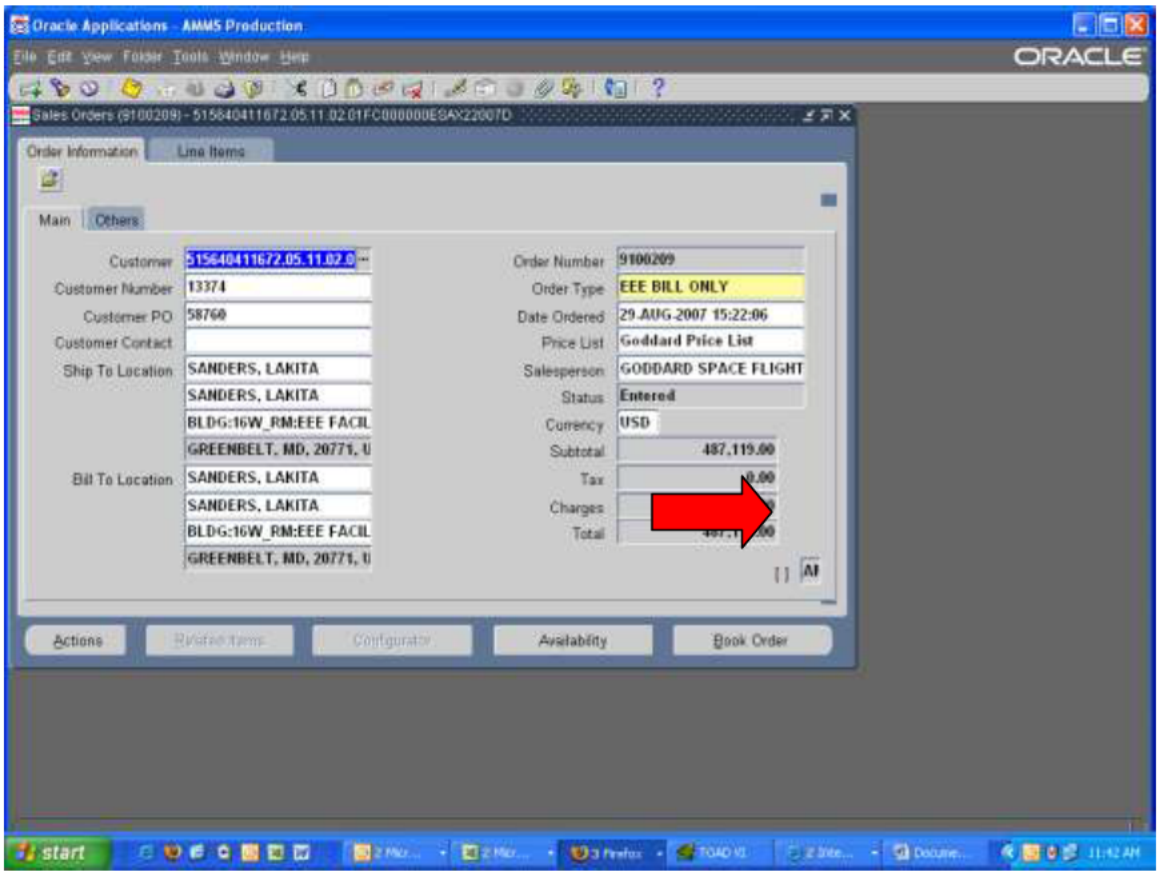
Purpose

The purpose of this training script is to sho how to copy an order

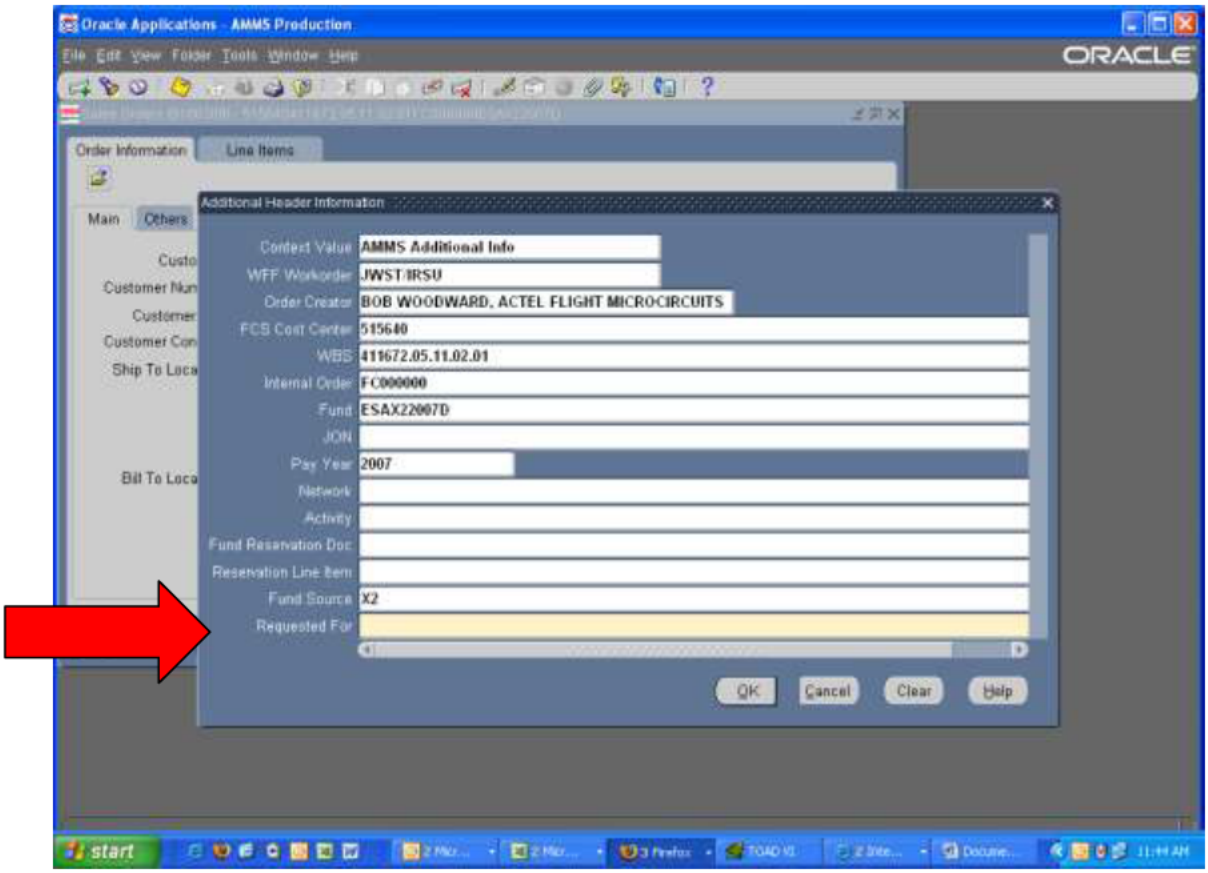
Audience

Name1, name2, name3

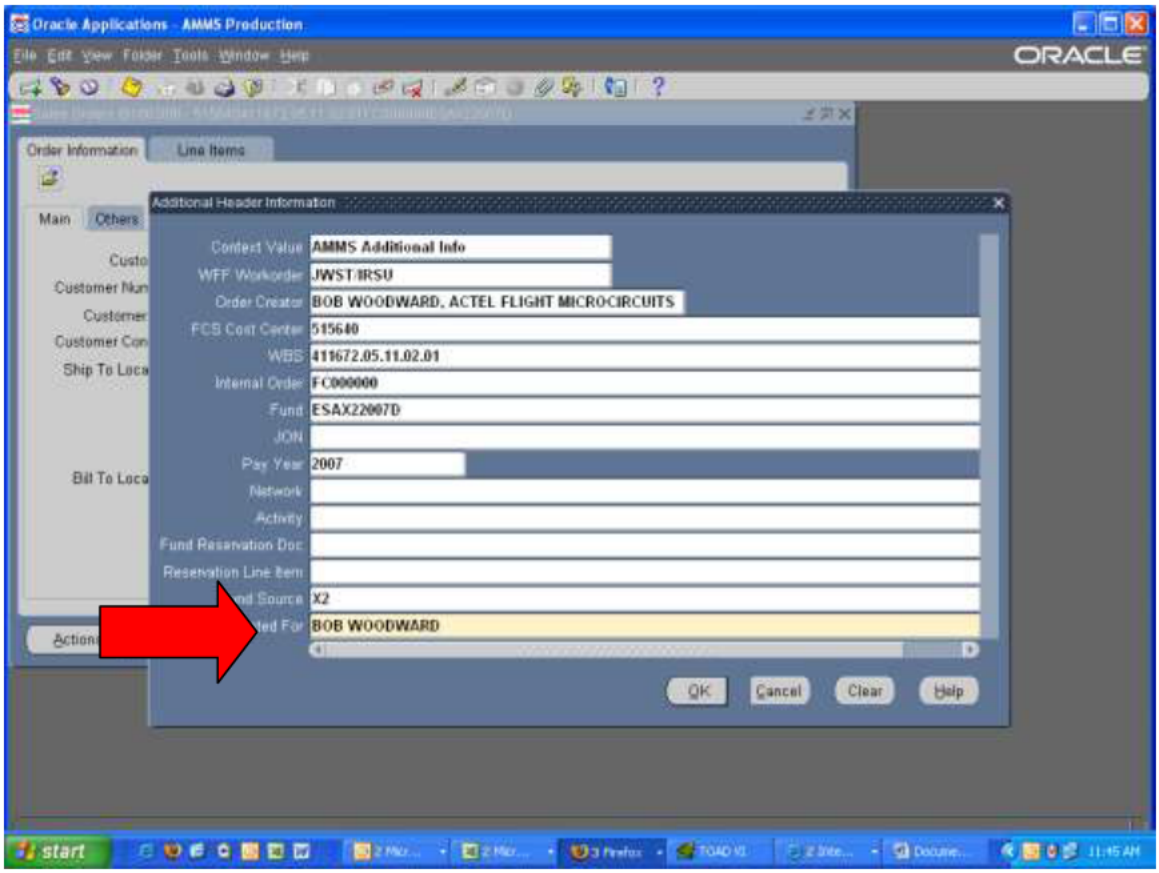
Prepared By	Theresa Coulson
Creation Date:	12/3/2007
Document Name	Requested For Field Copy Order.doc
Version	2
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Order Management.	



This is the Copy From order. Click on the little [ ] field at the bottom right of the window

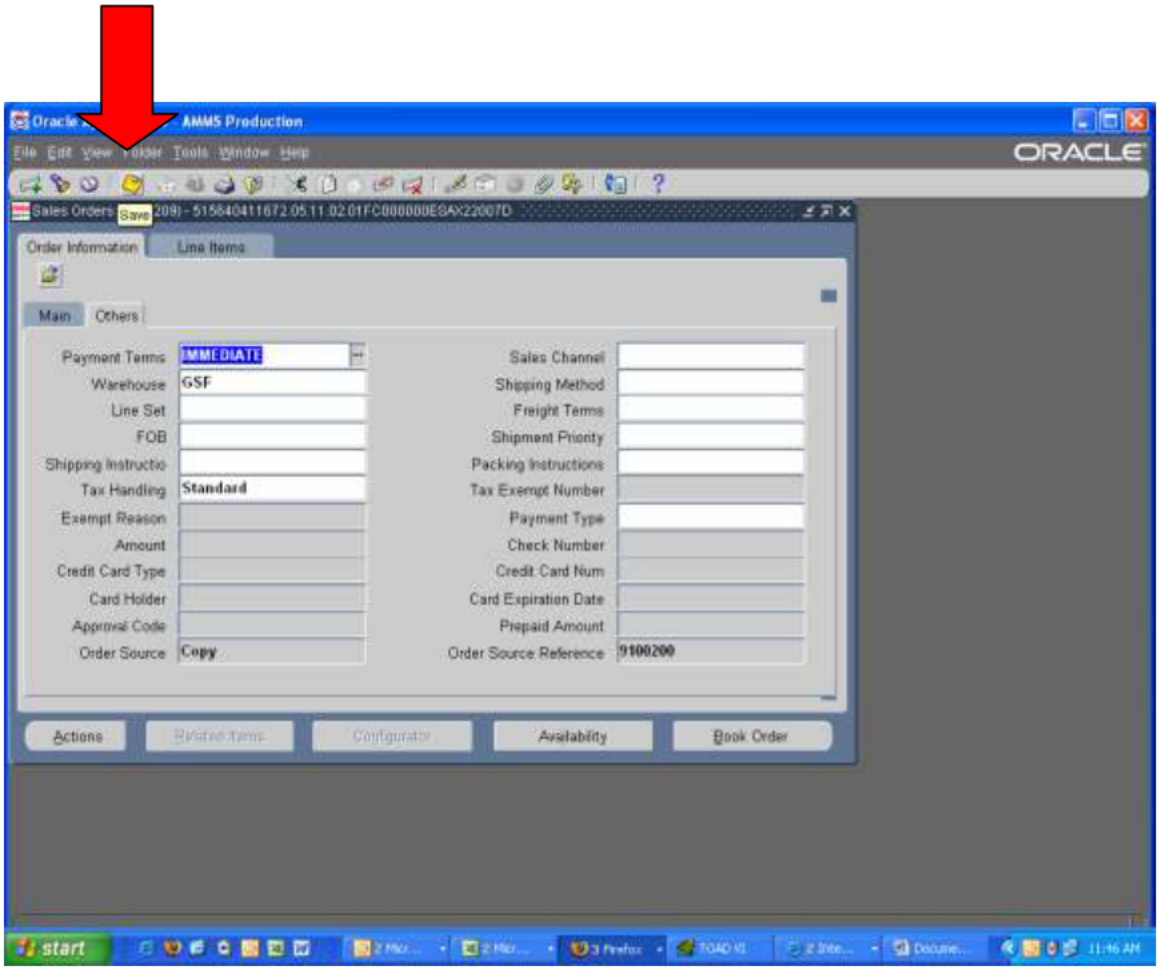


The bottom line needs the Requested For



The Requested for field with data entered.

Click the OK at the bottom of the Additional Header Information Window



Save your order

You can now start your Copy process.

AMMS PURCHASING TRAINING SCRIPTS

AMMS TRAINING SCRIPT

Project Parts Create an Attachment to a Purchase Order

Purpose

The purpose of this training script is to show Buyers how to create an attachment to a Purchase Order. Attachments are added after any change to a purchase order.

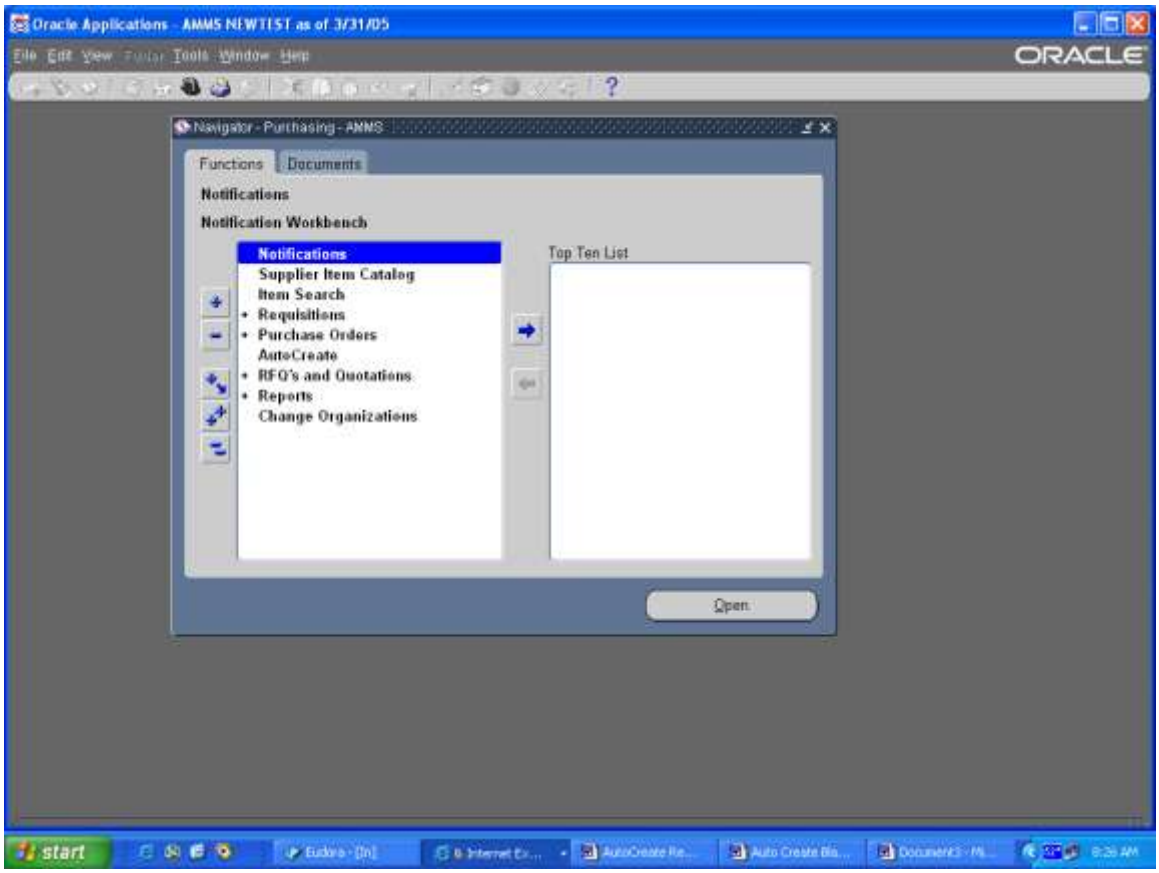
Audience

Buyers

Prepared By	Theresa Coulson
Creation Date:	04/26/2005
Document Name	Adding Attachment to PO.doc
Version	4
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Purchasing.	

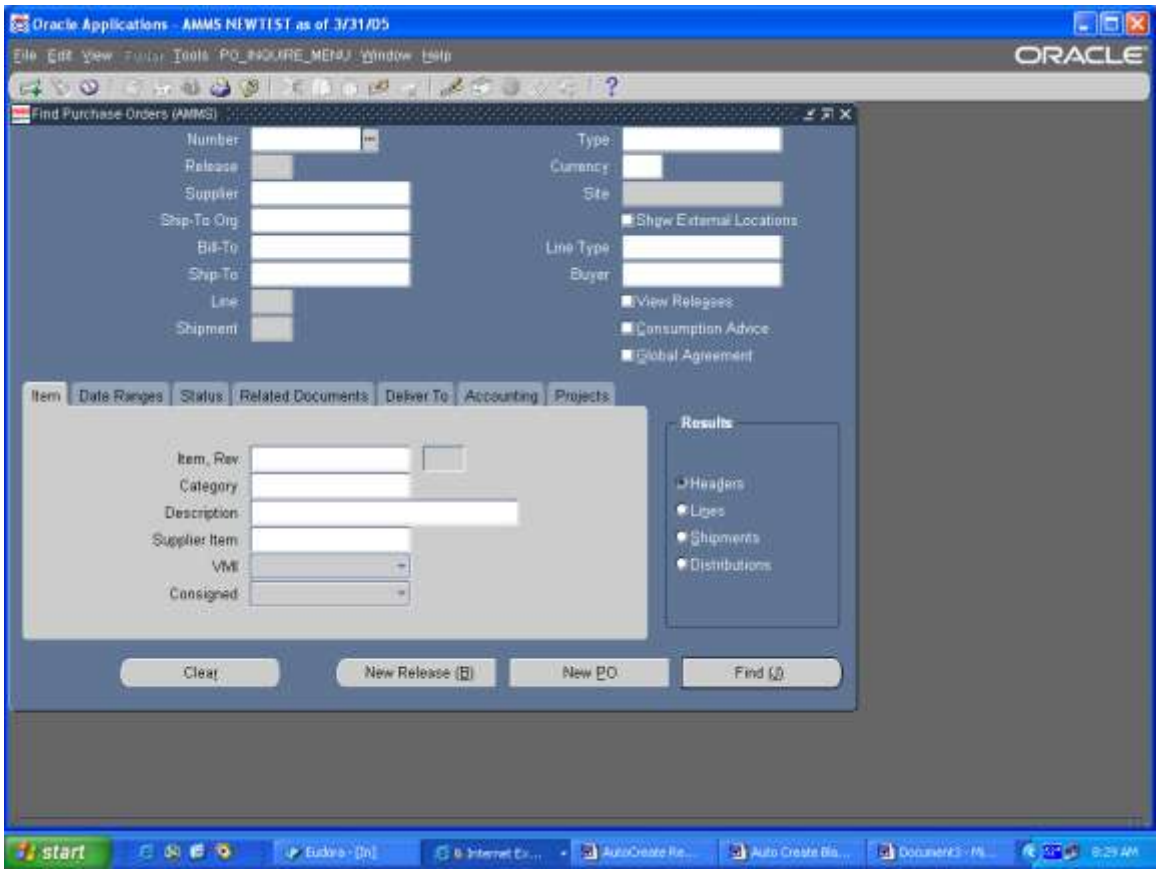
Step Description: Sign onto Oracle and select Purchasing AMMS responsibility

Expected Results: Purchasing AMMS main menu will appear



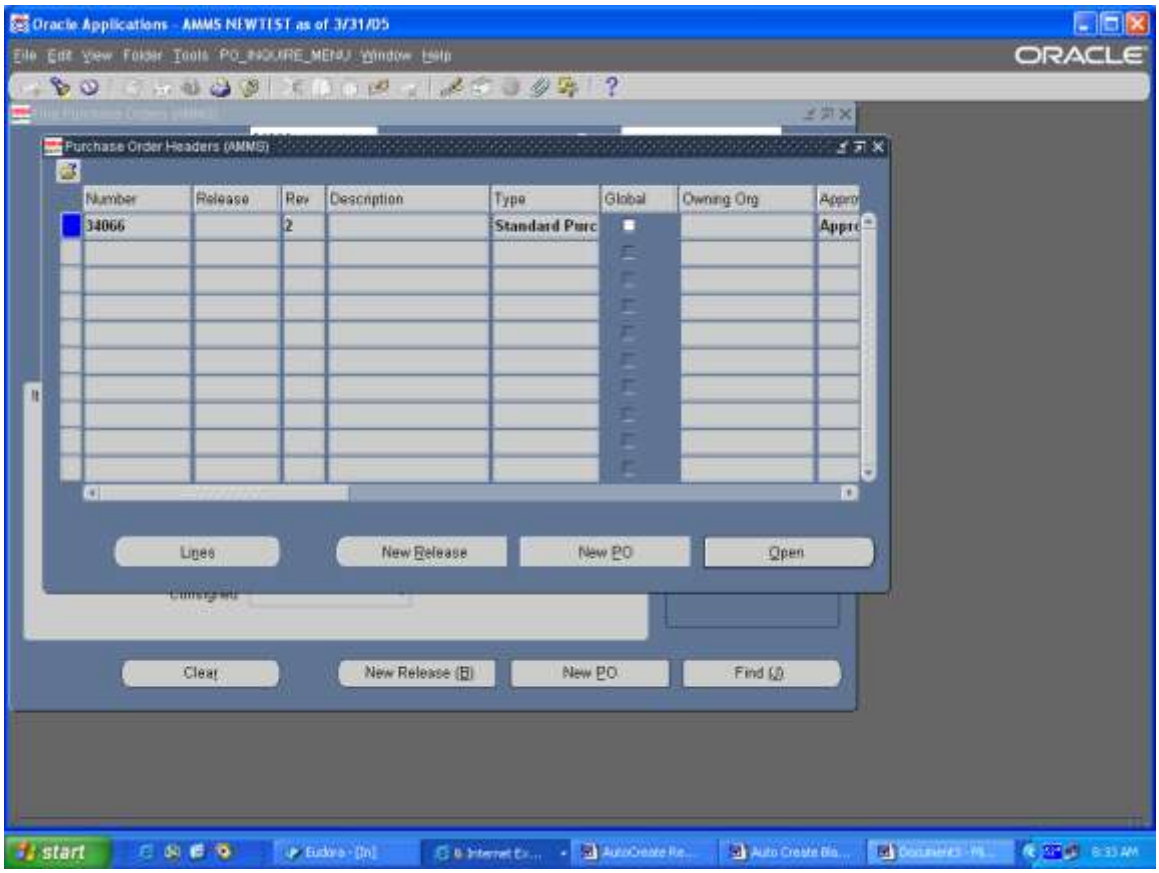
Step Description: From the Purchasing AMMS main menu select Purchase Order > Purchase Order Summary click Open

Expected Results: The Find Purchase Order window will appear



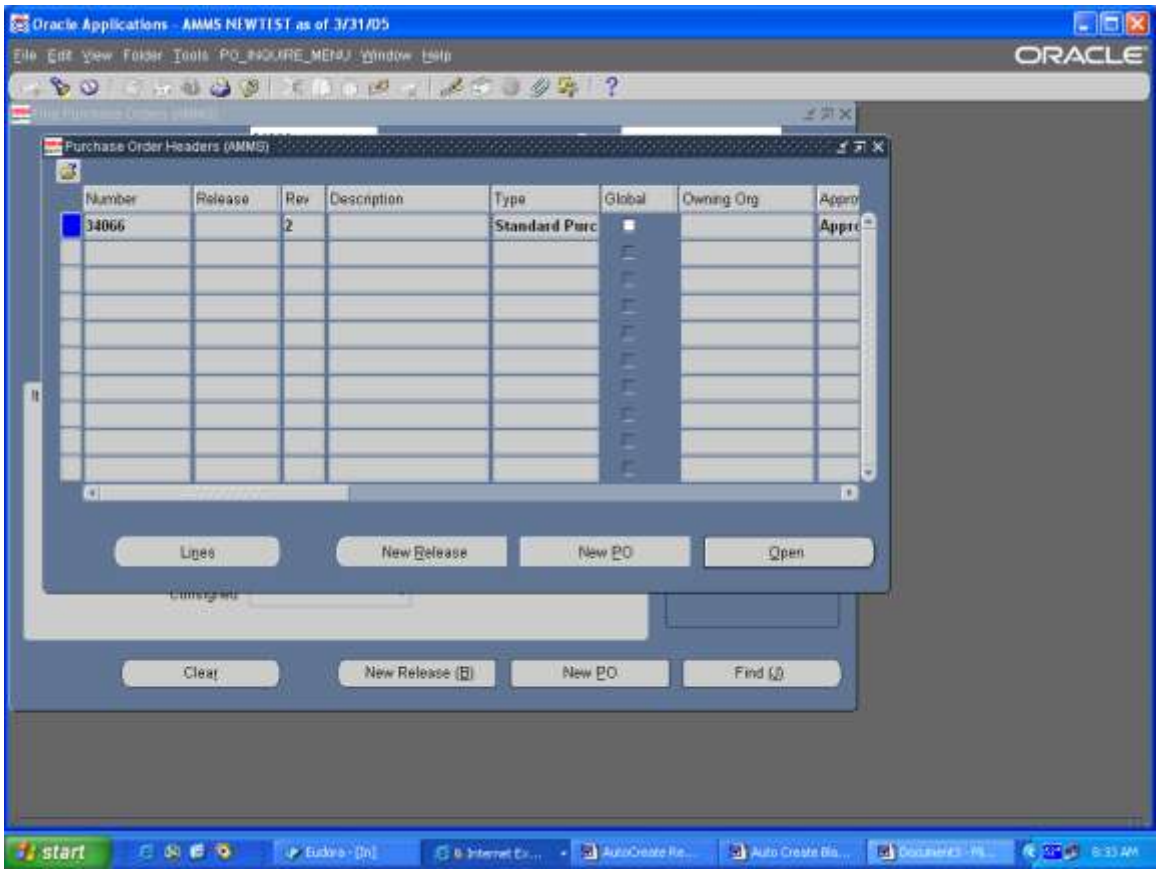
Step Description: Enter the PO number you want to create the attachment for, click on the Find button

Expected Results: Purchase Orders Header window will appear



Step Description: Click on the Open Button to Open the Purchase Order

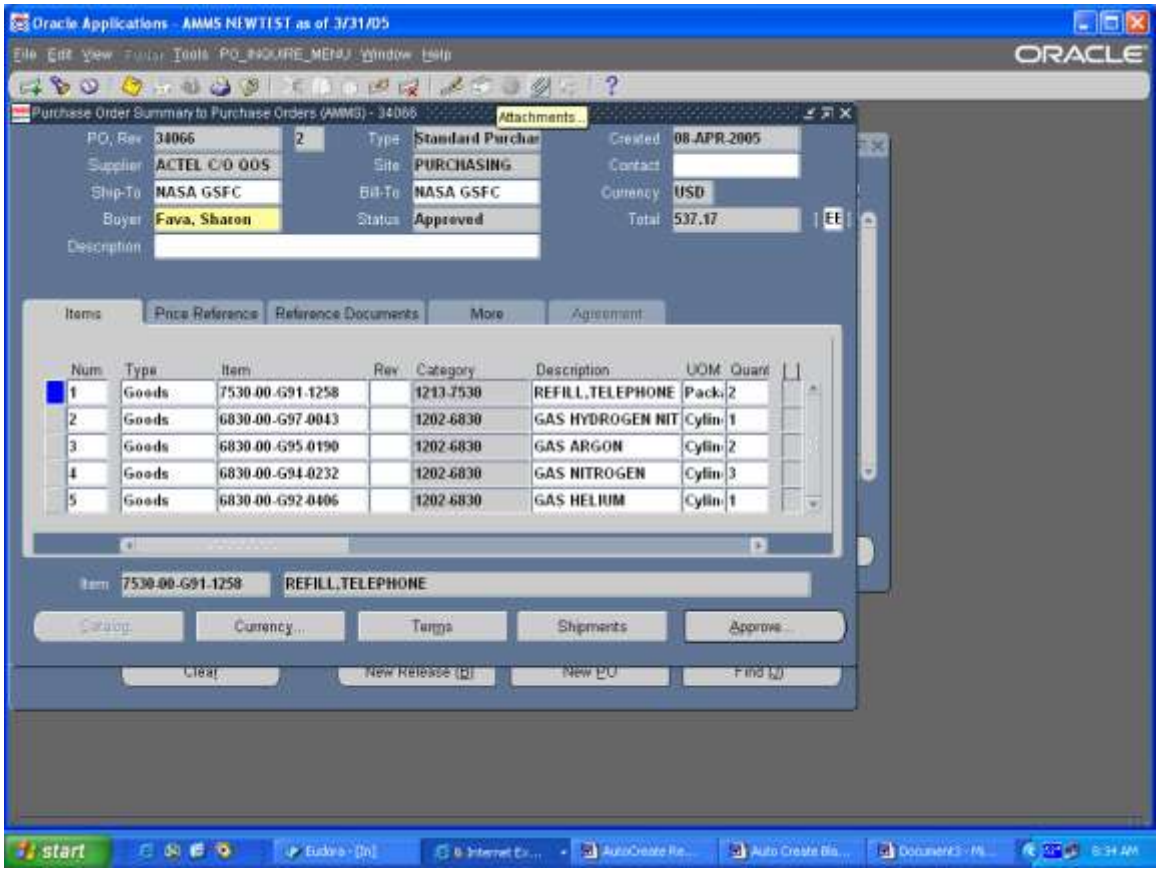
Expected Results: Purchase Order Summary to Purchase Order window will appear



NOTE: TO PUT ATTACHMENT AT THE HEADER LEVEL CLICK IN A FIELD AT THE TOP OF THE FORM. TO PUT AN ATTACHMENT AT THE LINE LEVEL CLICK ON A LINE ON THE PURCHASE ORDER.

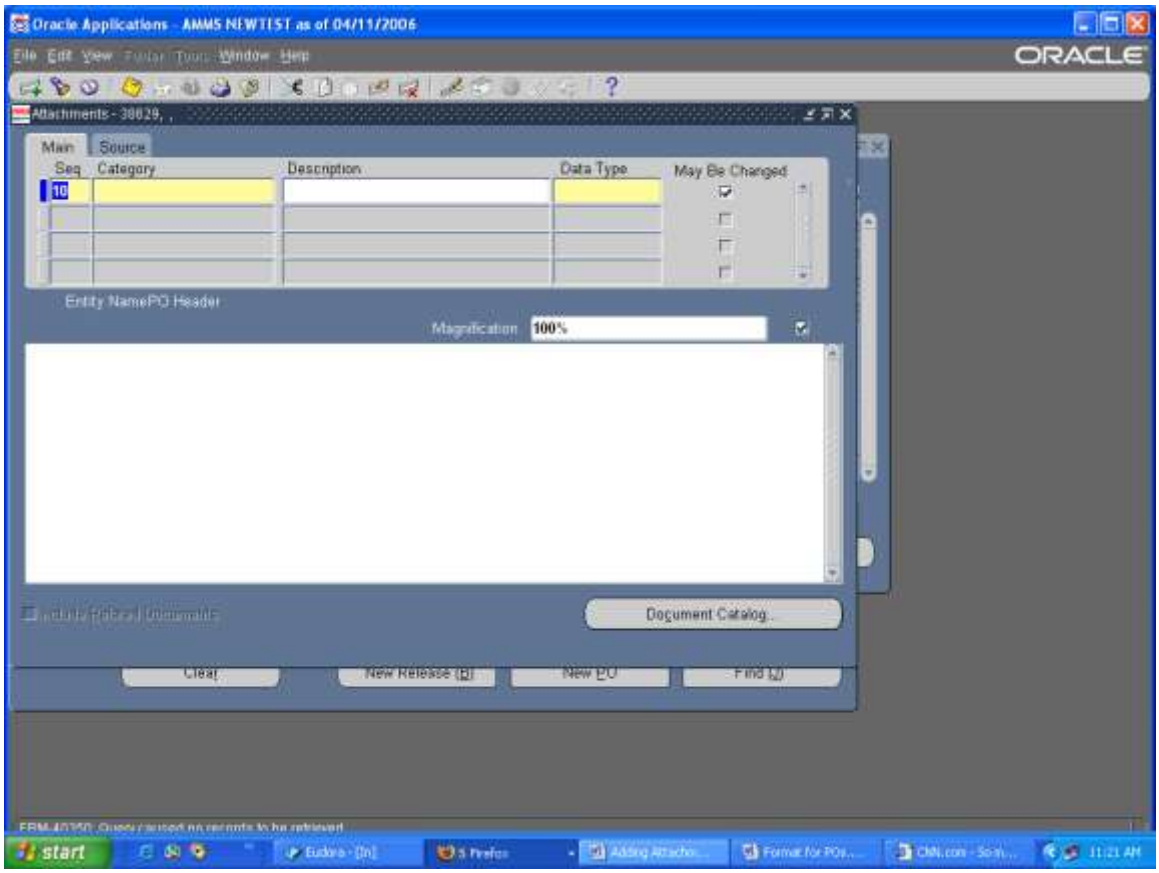
Step Description: From the Tool Bar select the icon that looks like a Paper clip

Expected Results: Attachments window will appear



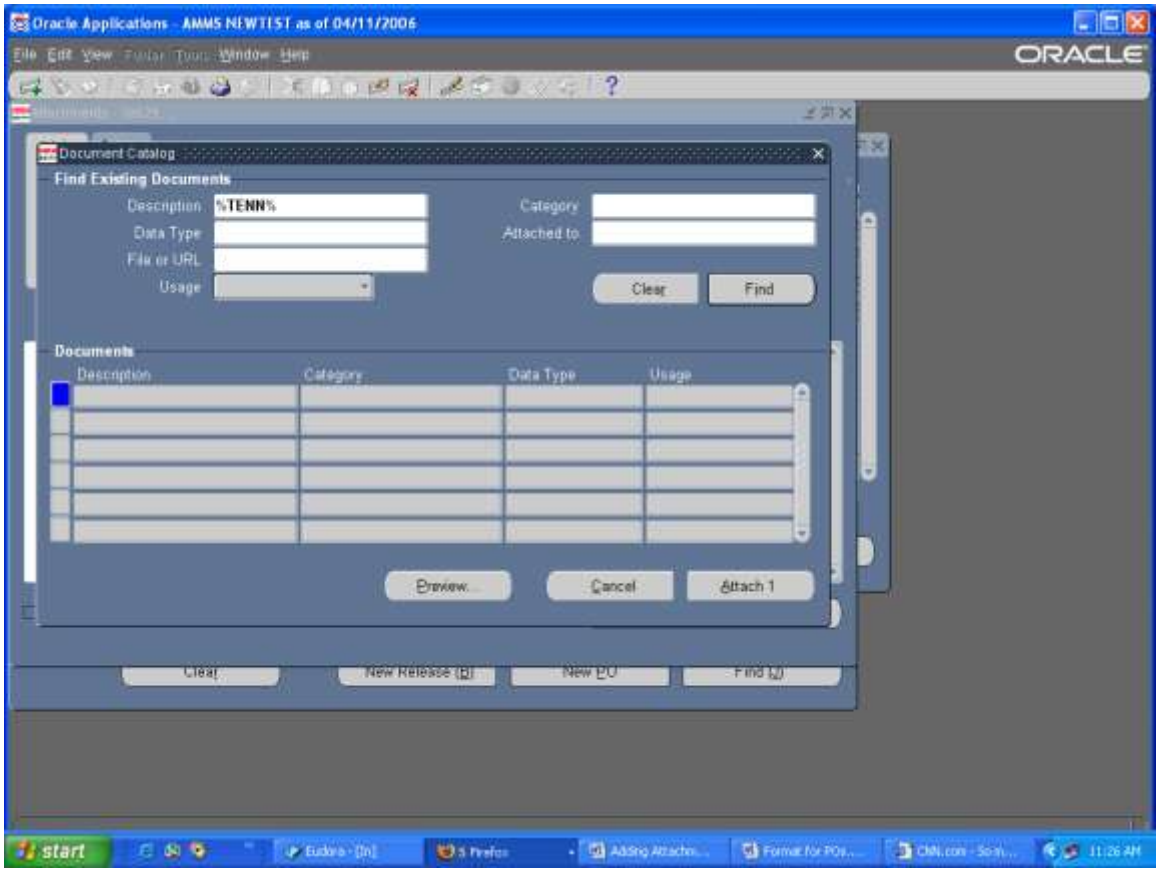
Step Description: If you are using an Attachment format click on the Document Catalog button at the bottom right of the window

Expected Results: Document Catalog window will appear



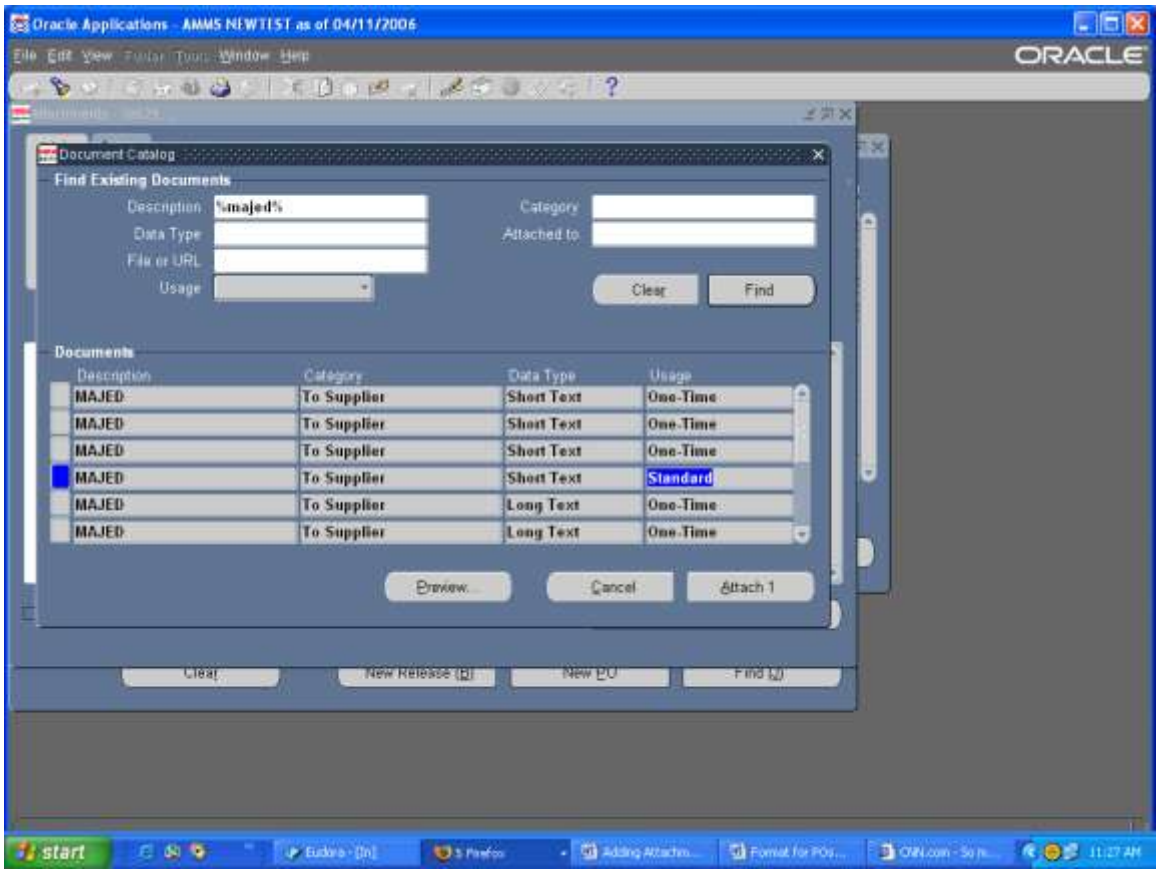
Step Description: At the Document Catalog window, in the Description field enter part of the attachment name, example %TENN%, click on the Find button

Expected Results: Attachment will appear at bottom of window



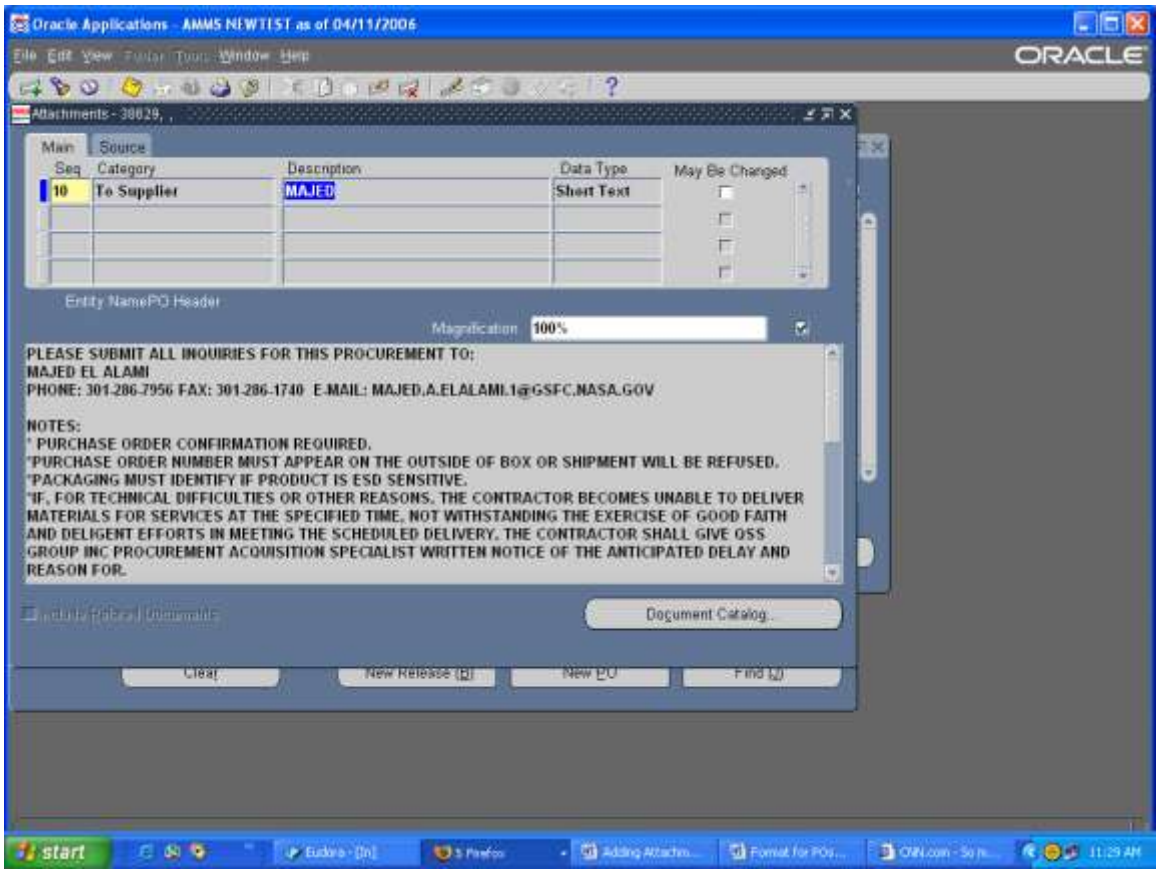
Step Description: Select the attachment, by clicking in the field, then click on the Attach 1 button

Expected Results: Attachment will be added to PO



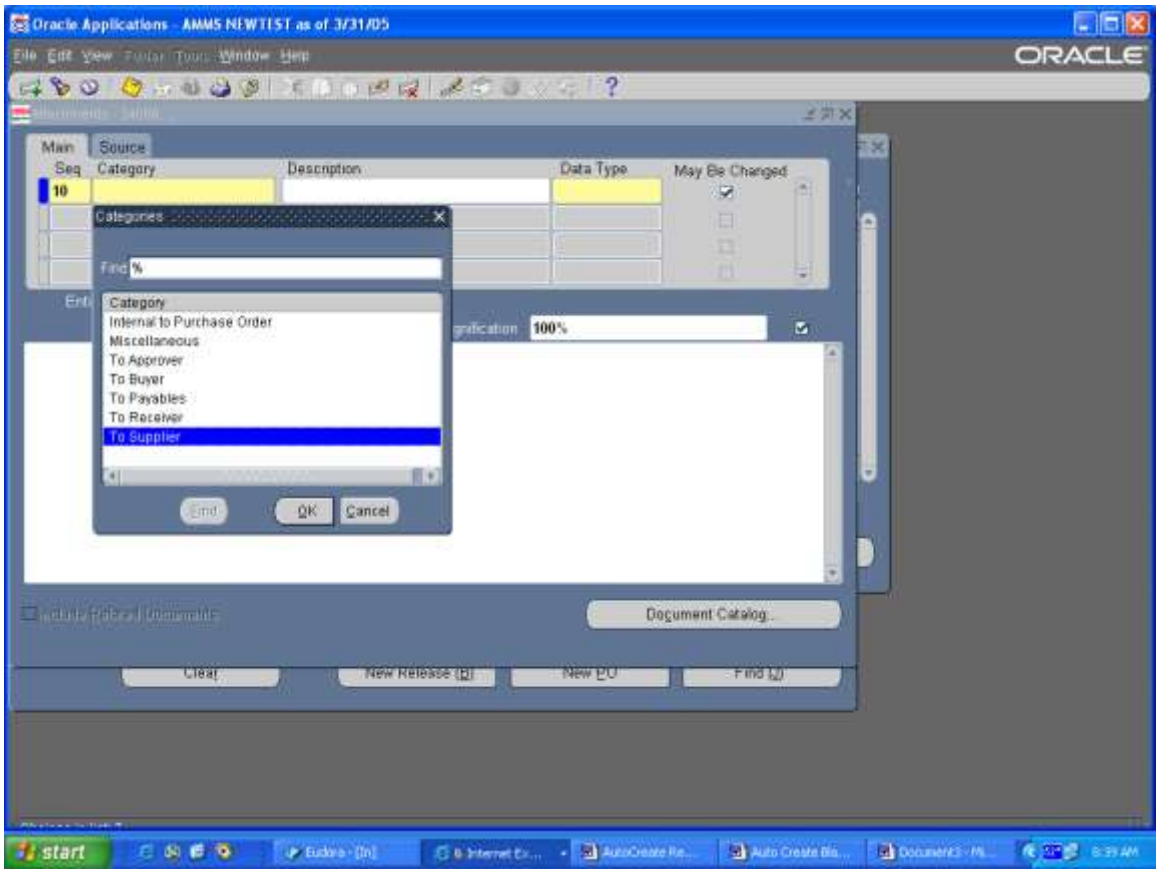
Step Description: To add multiple attachments to a PO click in the next line in the Attachment window

Expected Results: Field will be ready to populate



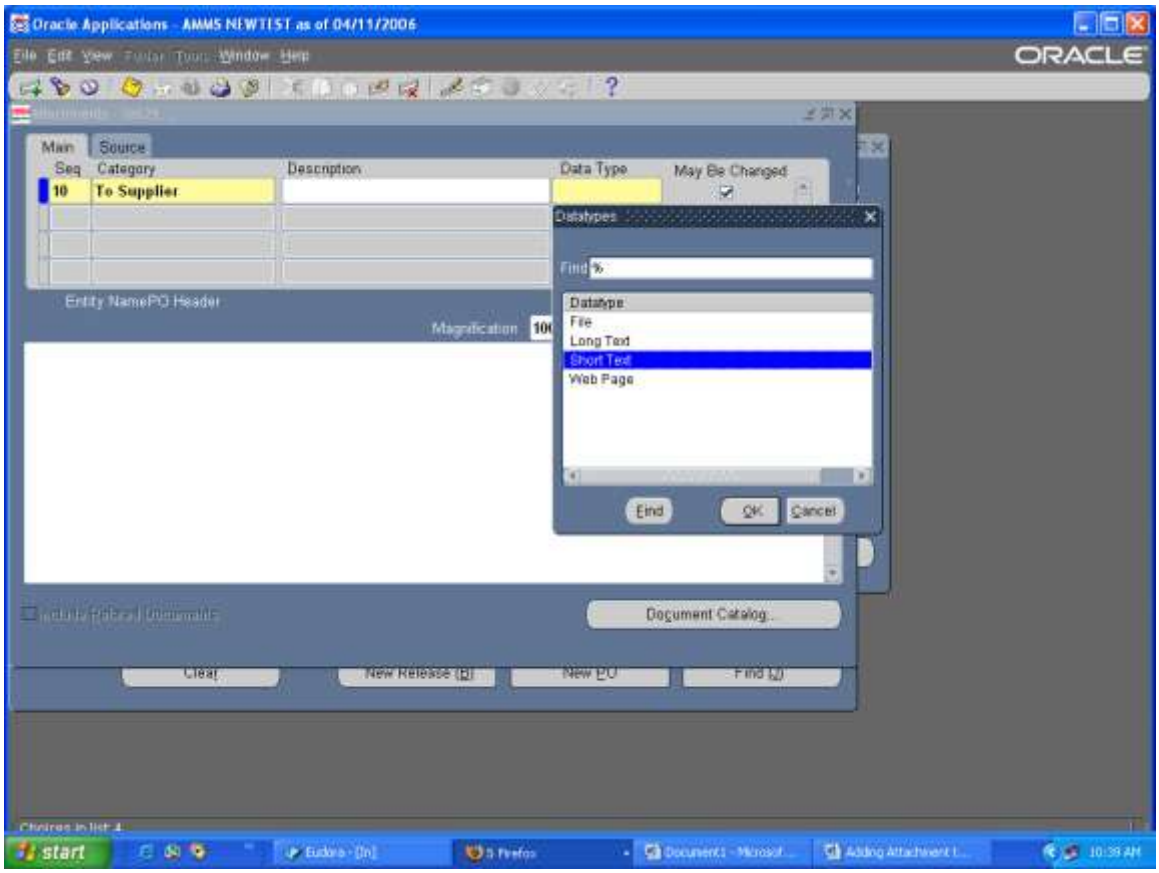
Step Description: If you are typing an attachment, click on the Category field click on the LOV and in the Find window enter a % sign and a list of choices will appear, select the appropriate category. To Supplier is the one to be used.

Expected Results: Field will be populated



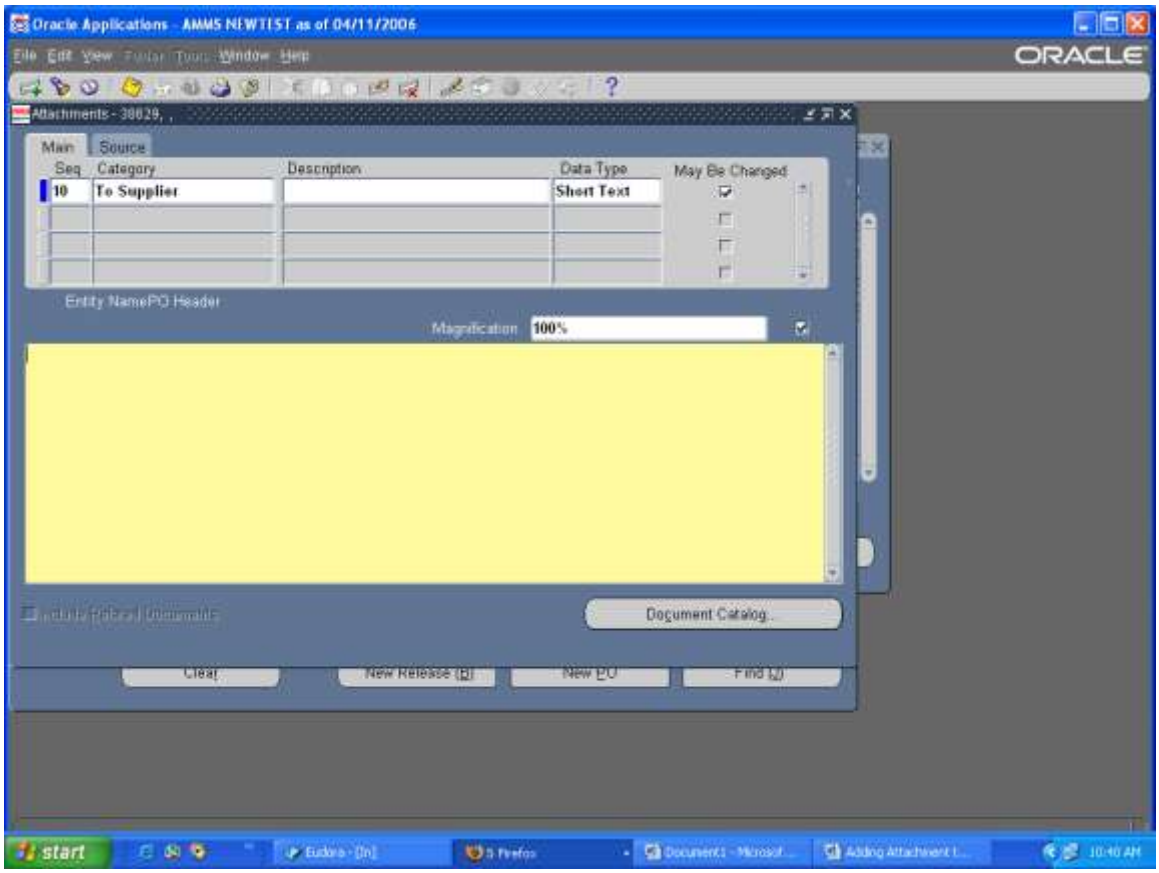
Step Description: In the Data Type field click on the LOV and select Short Text, this will allow you to type more information

Expected Results: Field will be populated



Step Description: Notice the bottom field is yellow start typing you required information

Expected Results: Field will be populated



Step Description: Follow this format for putting attachments on purchase orders. Please note: changes to purchase orders are not to be put in attachments, they are to be put in the Note to Supplier field:

1. Change information to supplier, if applicable – address in the **Notes to Supplier** use this field for changes to PO only.

   Change 2, April 10, 2006 (list the change number to the supplier along with the date, do not abbreviate)

   Added Line 12, PN 788978
   Deleted Line 3, PN 245895
   Added Line 16, Pre-cap Inspection, PN 78985
   Increased Quantity on Line 4, PN 898574, from 10 each to 15 each.
   Decreased Quantity on Line 6, PN4568, from 12 each to 9 each

2. **Buyer Contact Information**

3. **Notes**

4. **Verification of Services**

5. **Quote Reference Information**

6. **Quality Assurance and Shipping information (ie:see below)**

   Single Date Lot Code Required

   Manufacturer's C of C Required

   Special Packaging Requirements

   Chemical and Physical Analysis Required

   Multiple date codes acceptable (if non flight and customer has indicated such)

   Pre-cap Inspection information (ie: Pre-Cap Source Inspection appplicable to Line 3 also any Technical POC give, name, and

telephone number along with verification information, if applicable)

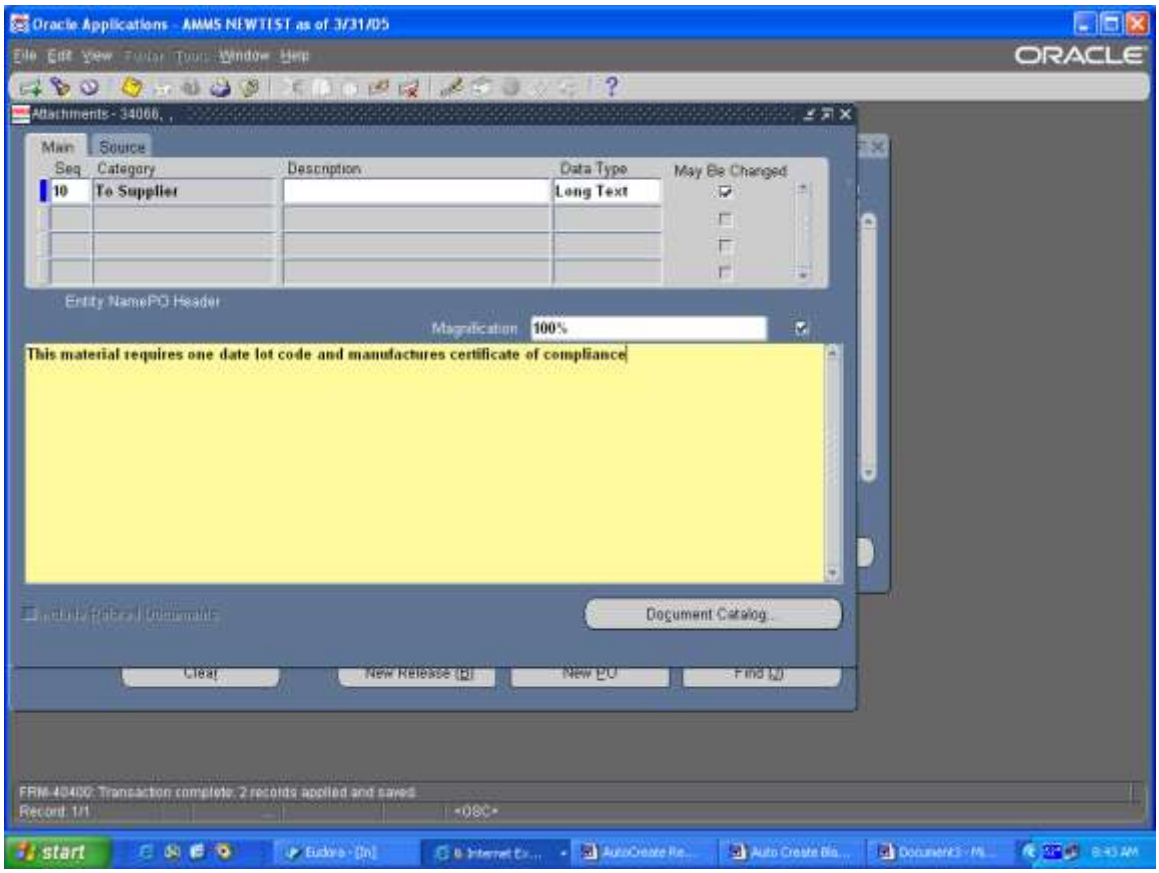
Other testing/data requirements information. (ie: Lot Charge and Screening and Group A Test Data applicable to Line 4)

7. **Physical, Chemical & Proof Test Required (IF Applicable).**

Attachments are to be put on the Purchase Orders in this order. Again any changes to purchase order there is NOT to be an Attachment, use the Note to Supplier field, see the Project Parts Change Established Purchase Order script.

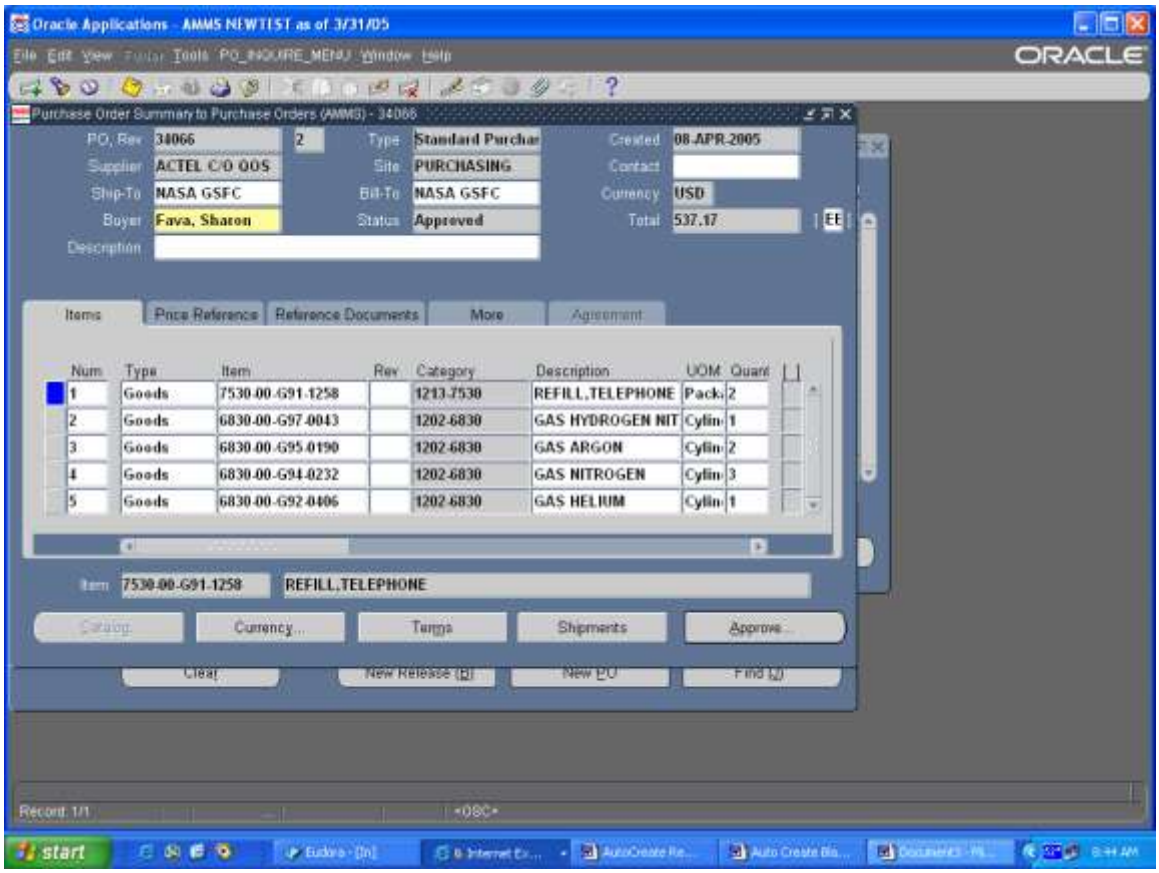
Step Description: Once you have entered all required information click on the Save button

Expected Results: Transaction Saved and Applied message



Step Description: Close the Attachment window.

Expected Results: Attached added to PO, will return to Purchase Order to Purchase Order Summary window.



Step Description: Close all forms Transaction Complete.

NOTE: If you want to put an Attachement on the PO Header click in one of the fields at the top of the Purchase Order Summary to Purchase Order window. If you want to put an Attachment at the line level for a specific item, click on the specific item, and then create the attachment.

AMMS TRAINING SCRIPT
Approving Purchase Order

Purpose

The purpose of this training script is to show how to approve a purchase order

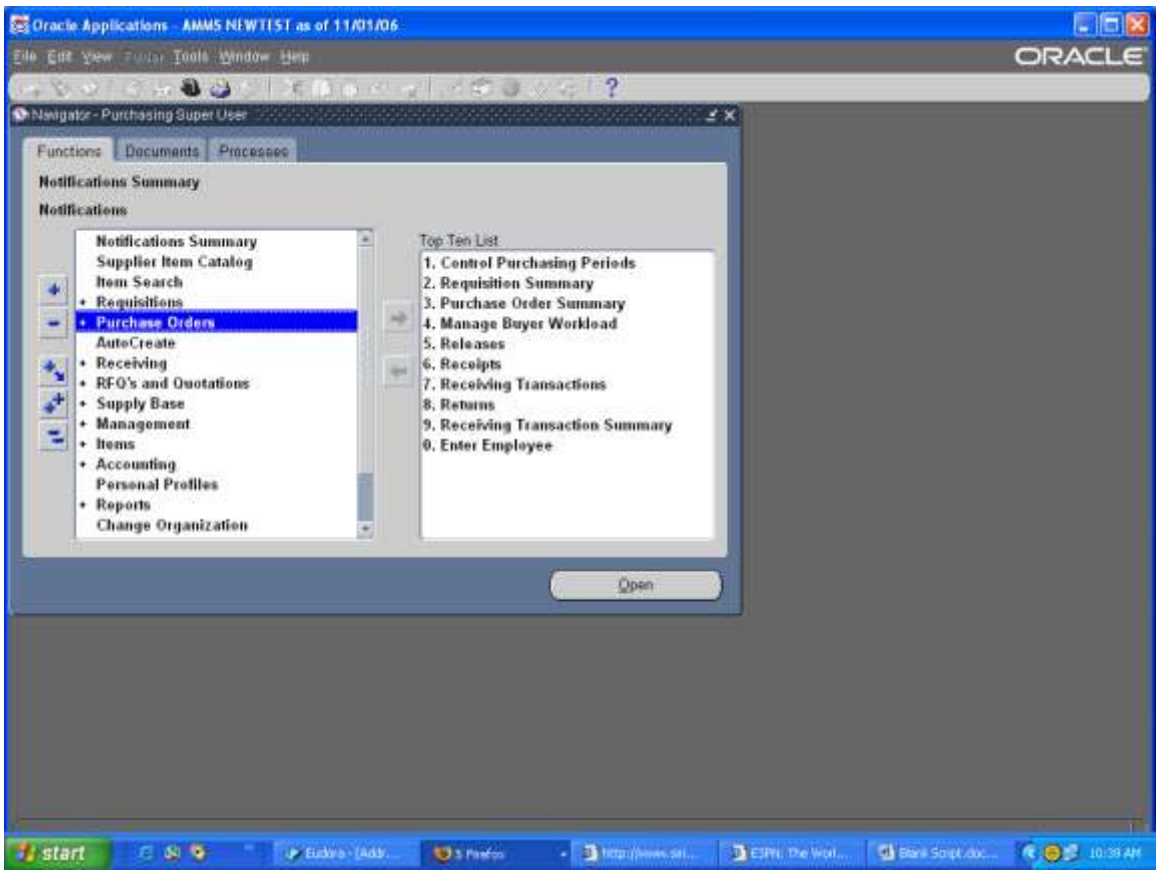
Audience

Purchasing Managers

Prepared By	Theresa Coulson
Creation Date:	11/16/2006
Document Name	Approve Purchase Order.doc
Version	2
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Purchasing.	

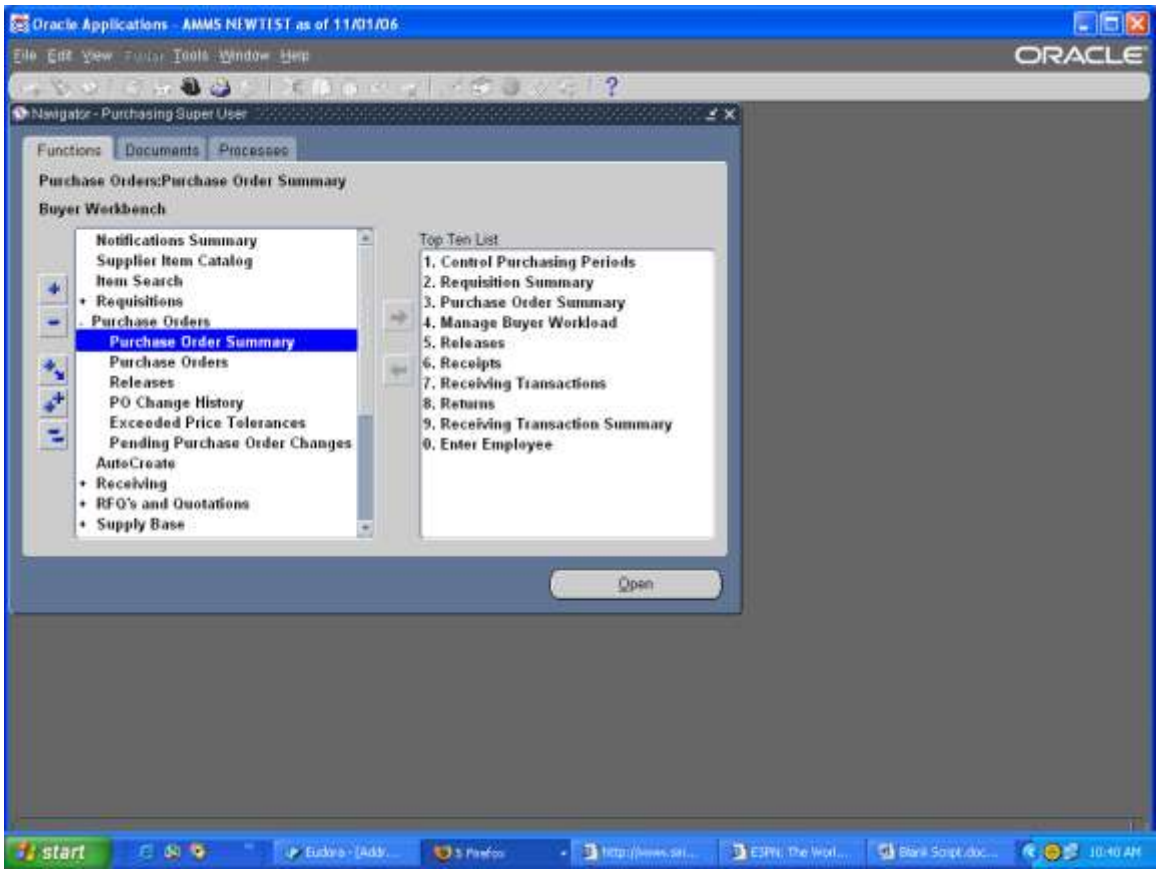
Step Description: Sign onto Oracle and select Purchasing Super User responsibility

Expected Results: Purchasing Super User main menu will appear



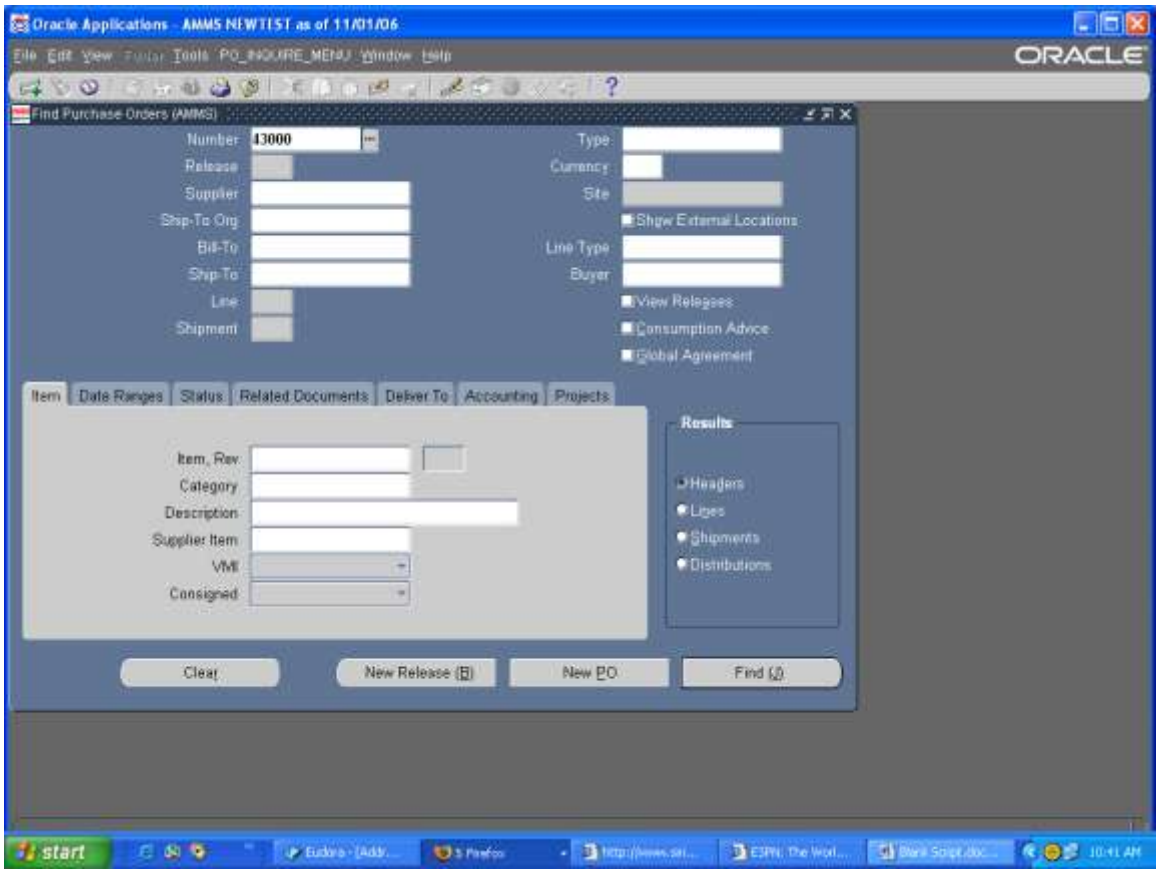
Step Description: From the Purchasing Super User main menu select Purchase Orders > Purchase Order Summary click on the Open button

Expected Results: Find Purchase Orders window will appear



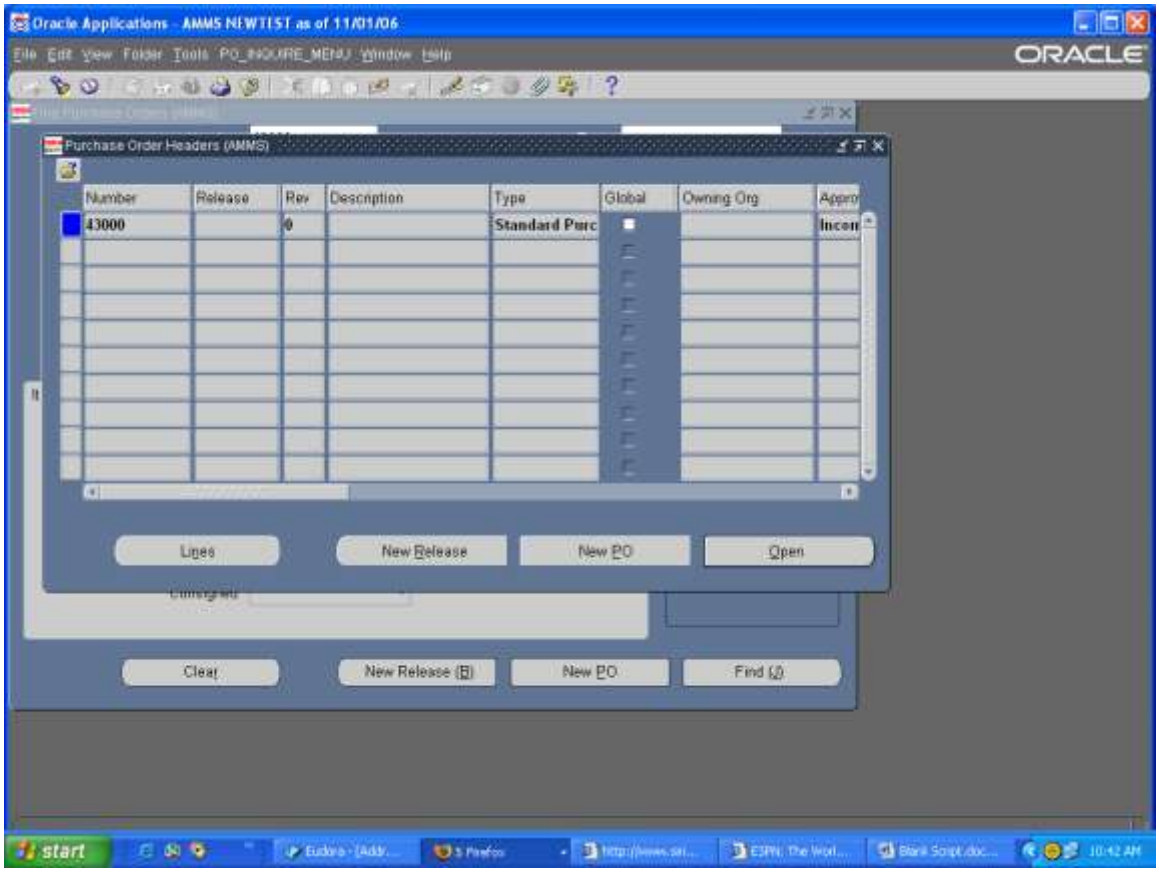
Step Description: In the Number field enter the Purchase Order that needs to be approved, click on the Find button

Expected Results: Purchase Order Header window will appear



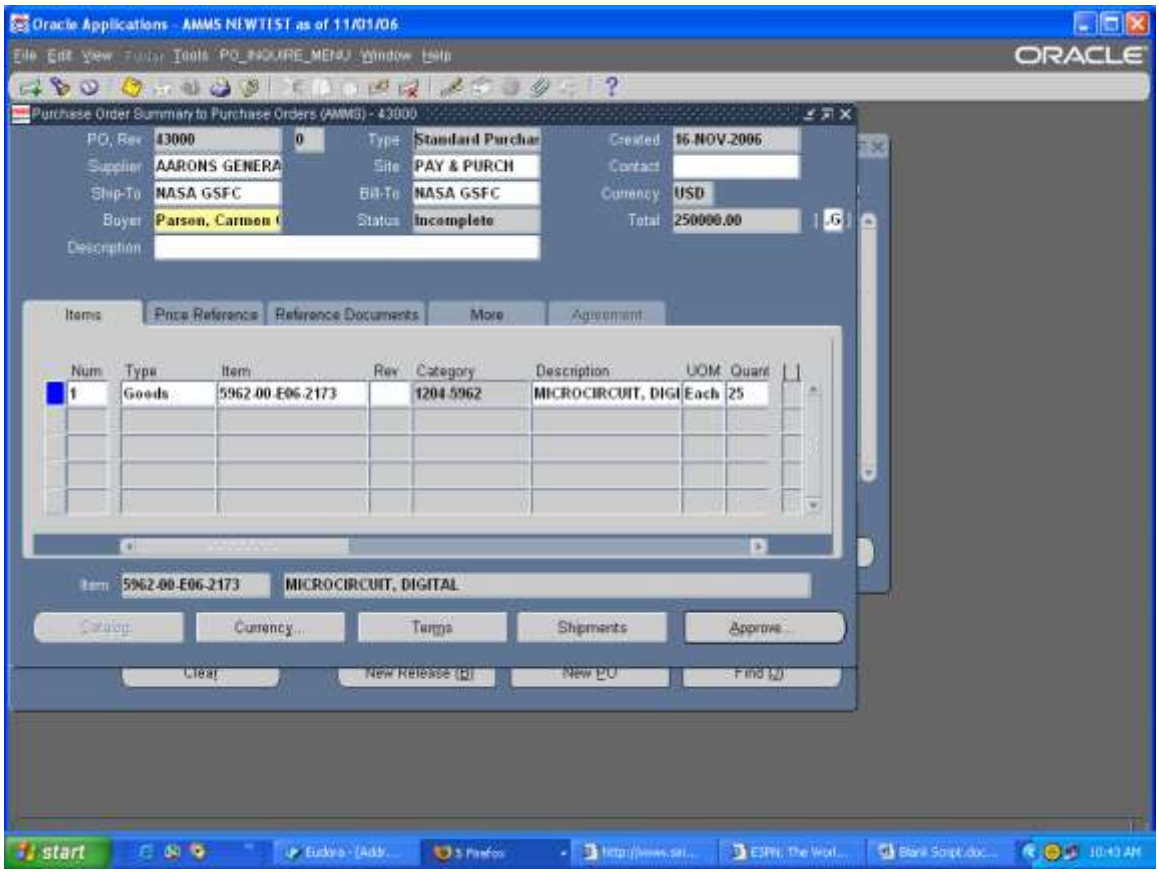
Step Description: Click on the Open button at the bottom right of the Purchase Order Header window

Expected Results: Purchase Order Summary to Purchase Order window will open



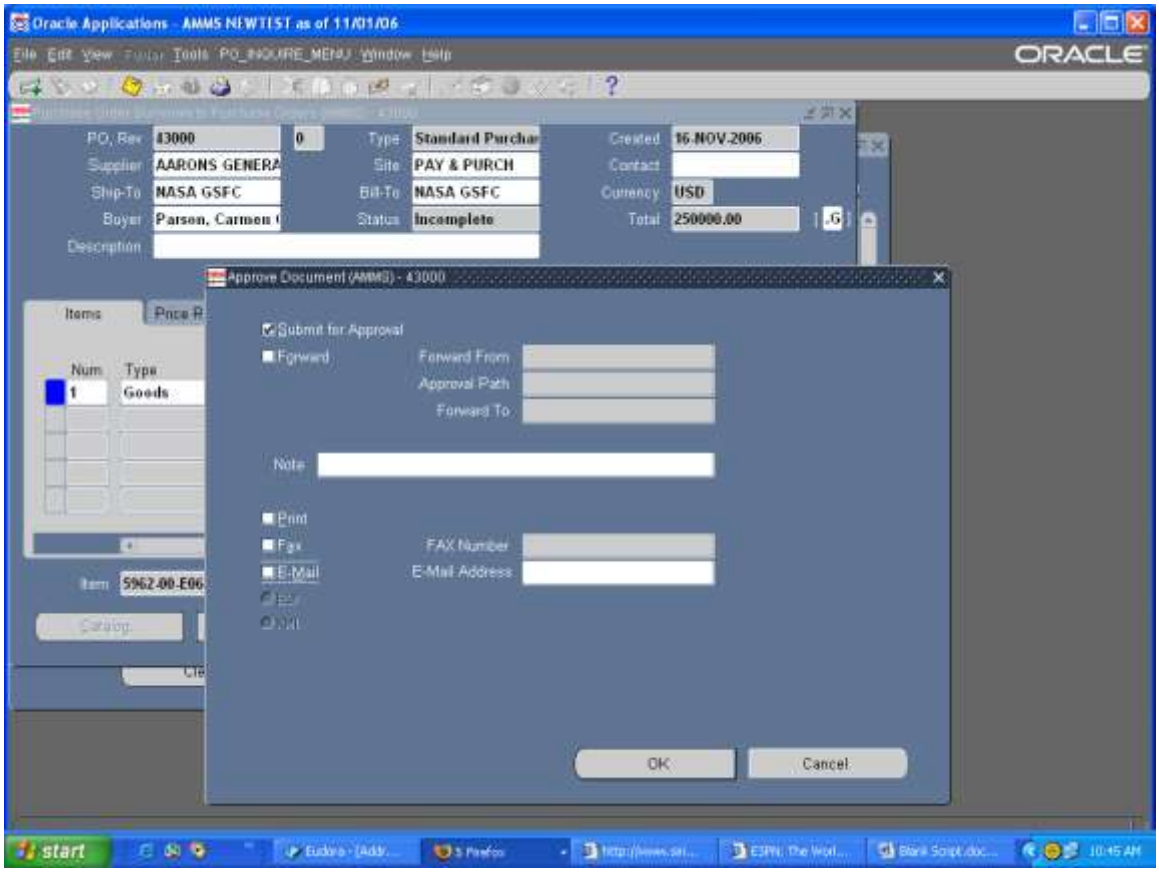
Step Description: Click the Approve button at the bottom right of the window

Expected Results: Approval Document window will appear



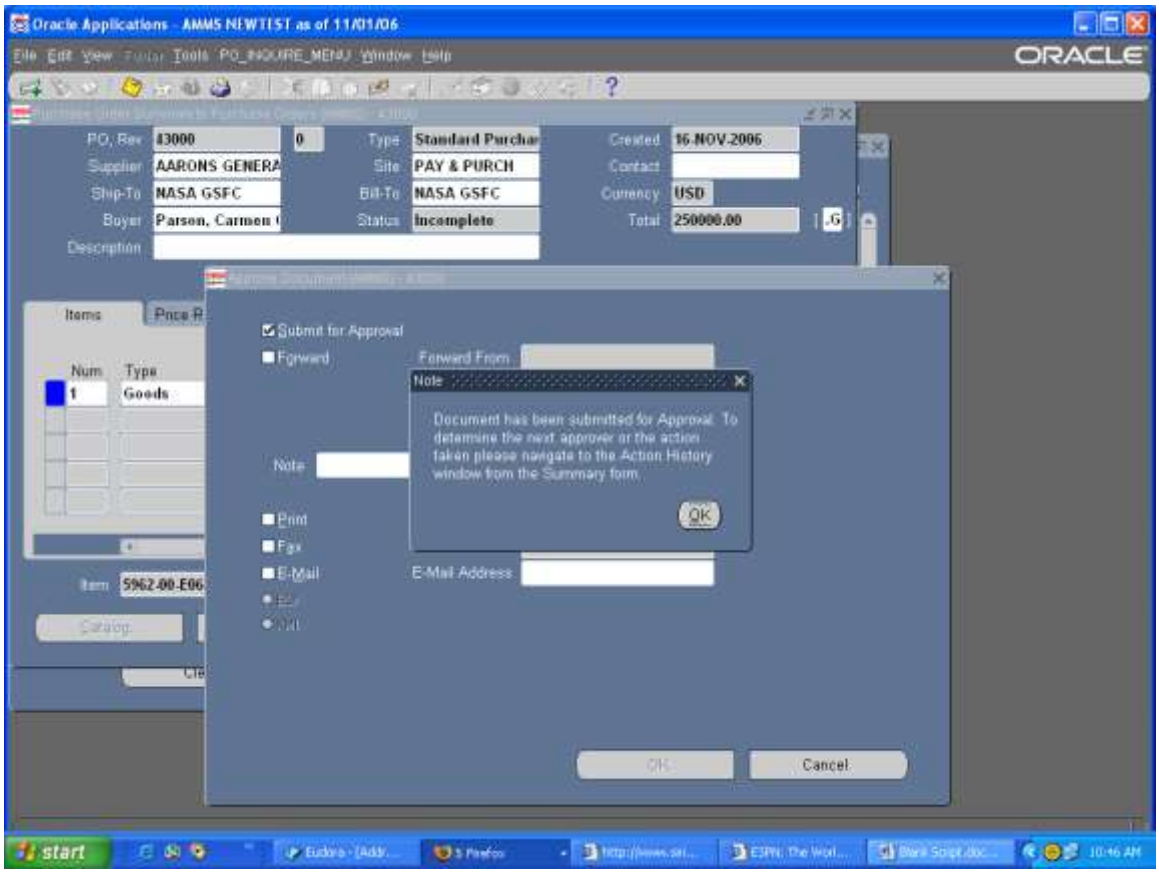
Step Description: Remove the check mark in the Email field, then click OK

Expected Results: Note window will appear

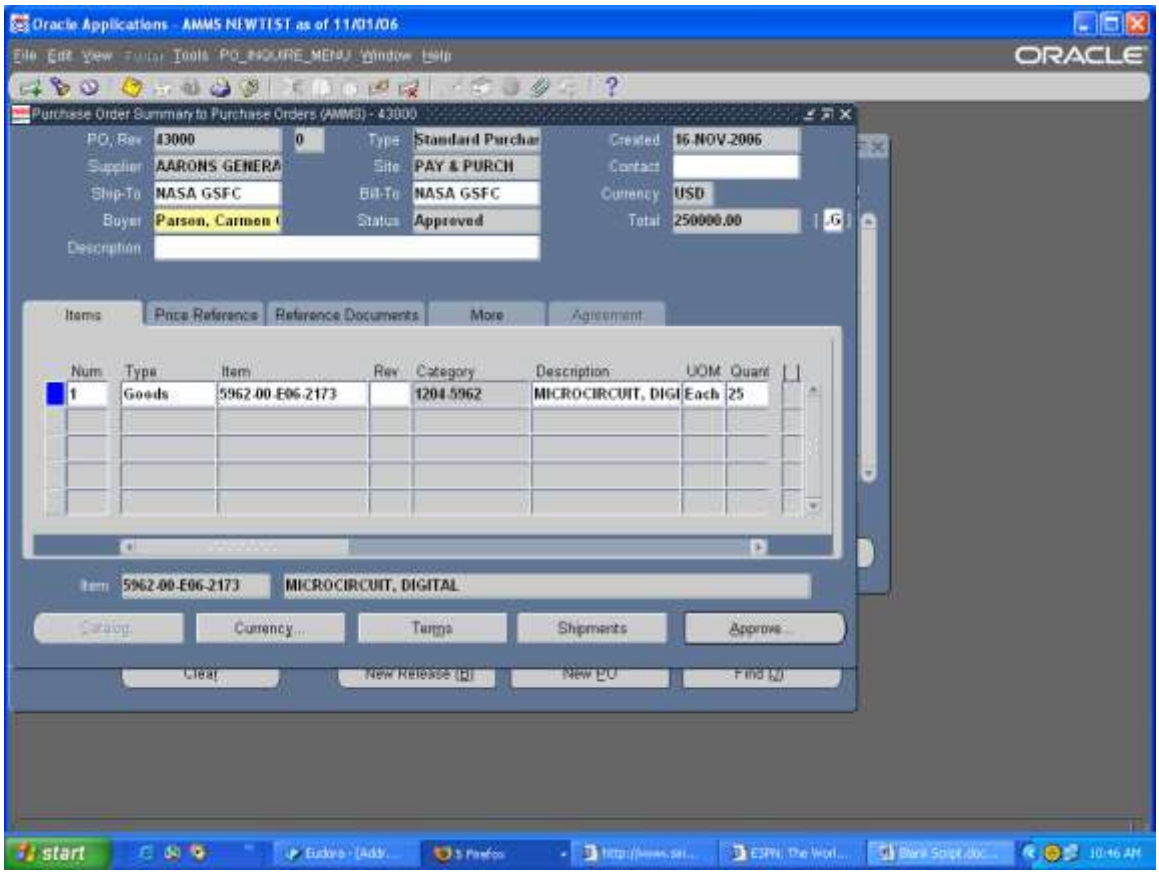


Step Description: Note window indicated PO has been approved, click OK to Note window

Expected Results: Status on PO changes



Results: PO status is now approved



AMMS TRAINING SCRIPT
Manage Buyer Workload

Purpose

The purpose of this training script is to show how to assign requisitions to a specific buyer

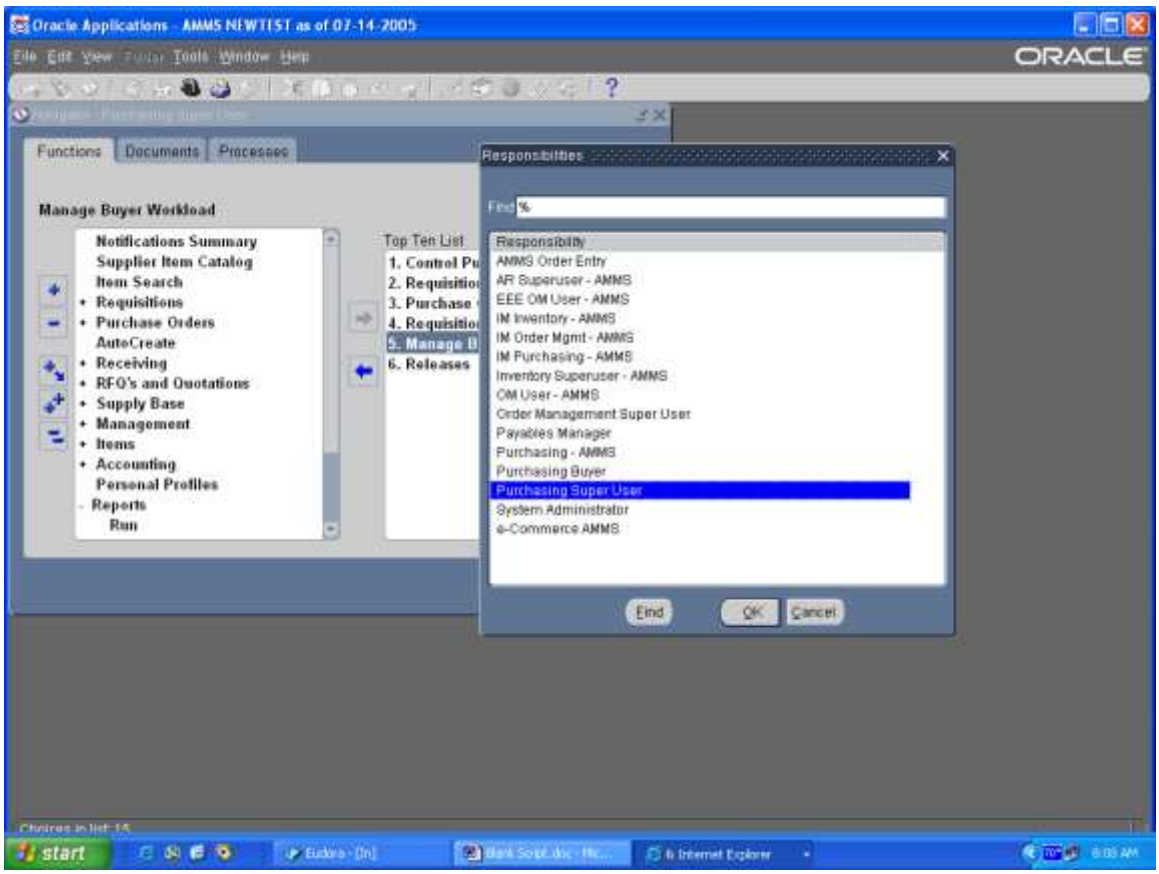
Audience

Procurement Manager and Supply Technicians

Prepared By	Theresa Coulson
Creation Date:	08/24/2005
Document Name	Assign Requisitions.doc
Version	2
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Purchasing.	

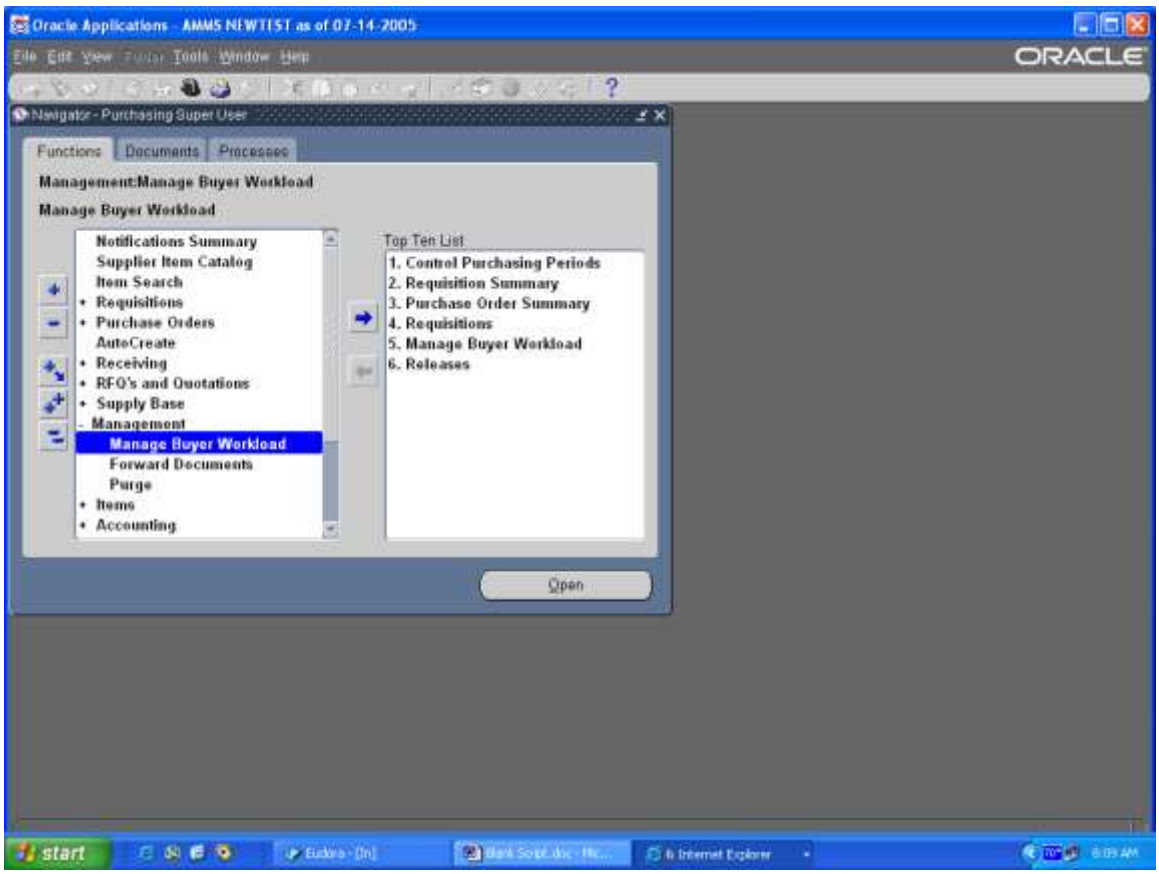
Step Description: Sign onto Oracle and select your Purchasing Super User responsibility

Expected Results: Purchasing Super User main menu will appear



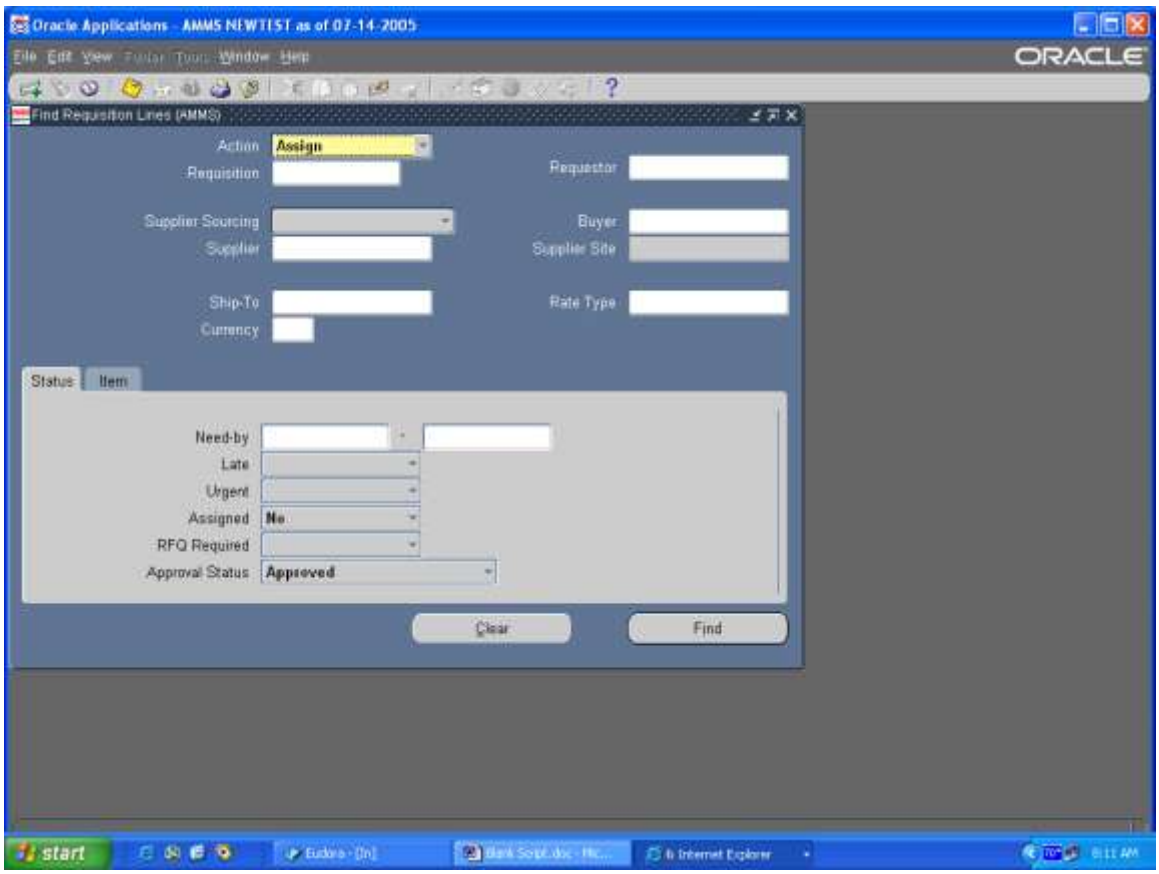
Step Description: From the Purchasing Super User main menu select Management > Manage Buyer Workload, click on the Open button

Expected Results: Find Requisition Lines window will appear



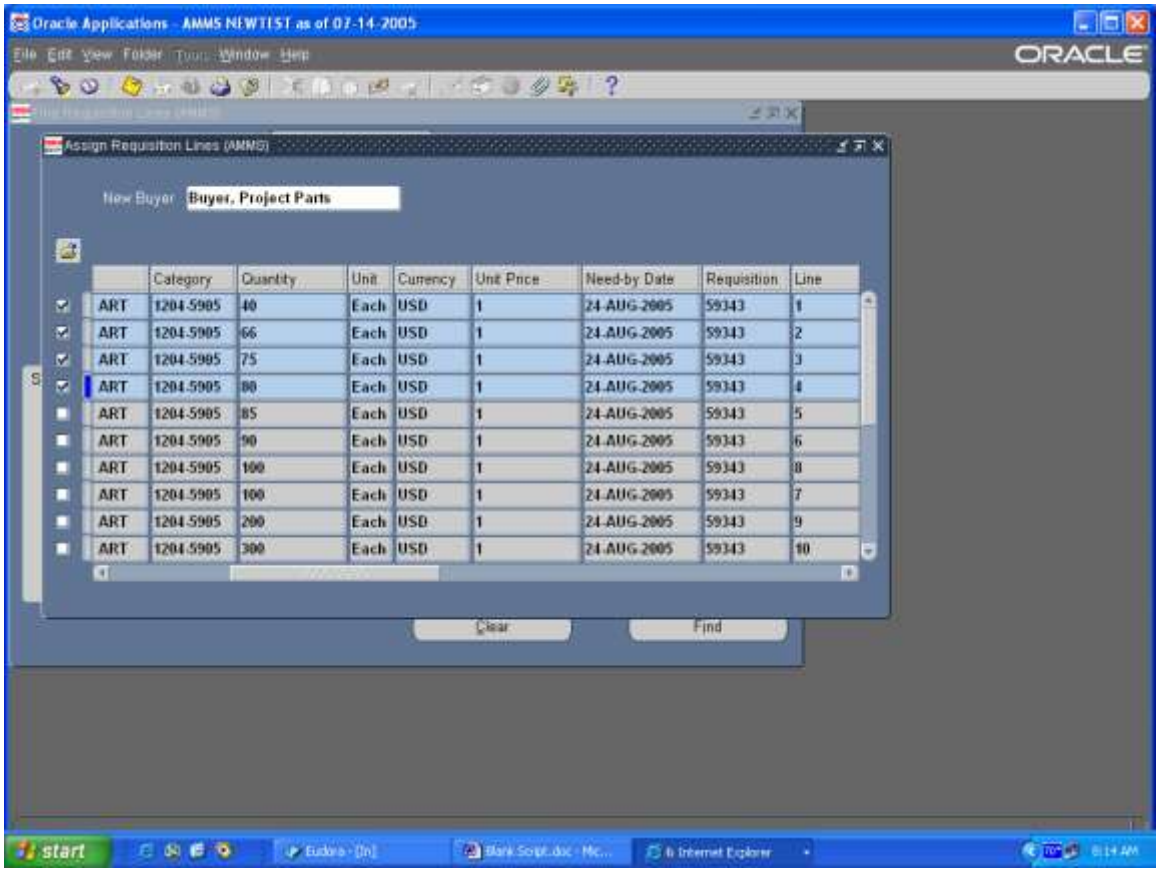
Step Description: To find all of the requisitions that need to be assigned, do not change any parameters, click on the Find button

Expected Results: Assign Requisition Lines window will appear



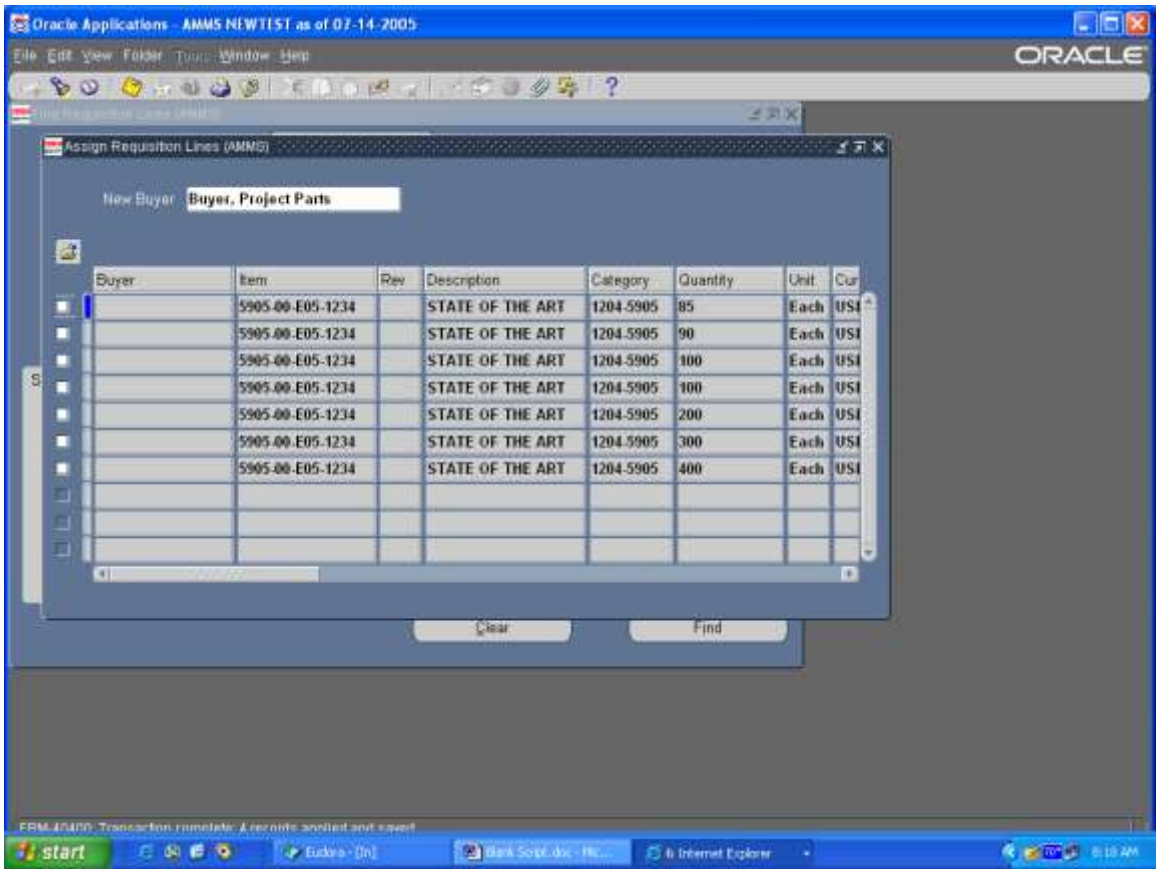
Step Description: Scroll over until you see the requisition number, this is you indicator, to assign requisitions place a check mark in the box at the beginning of the line, the line will turn blue, you can select multiple lines, once you have selected all of the requisitions, in the New Buyer field enter the name of the buyer who you want to assign the requisitions to.

Expected Results: Lines will be selected and New Buyer field will be populated



Step Description: Save your work

Expected Results: Lines that were selected will go away



AMMS TRAINING SCRIPT
Auto Create Blanket Release

Purpose

The purpose of this training script is to show Buyers and Material Coordinators how to auto create purchase release in Oracle

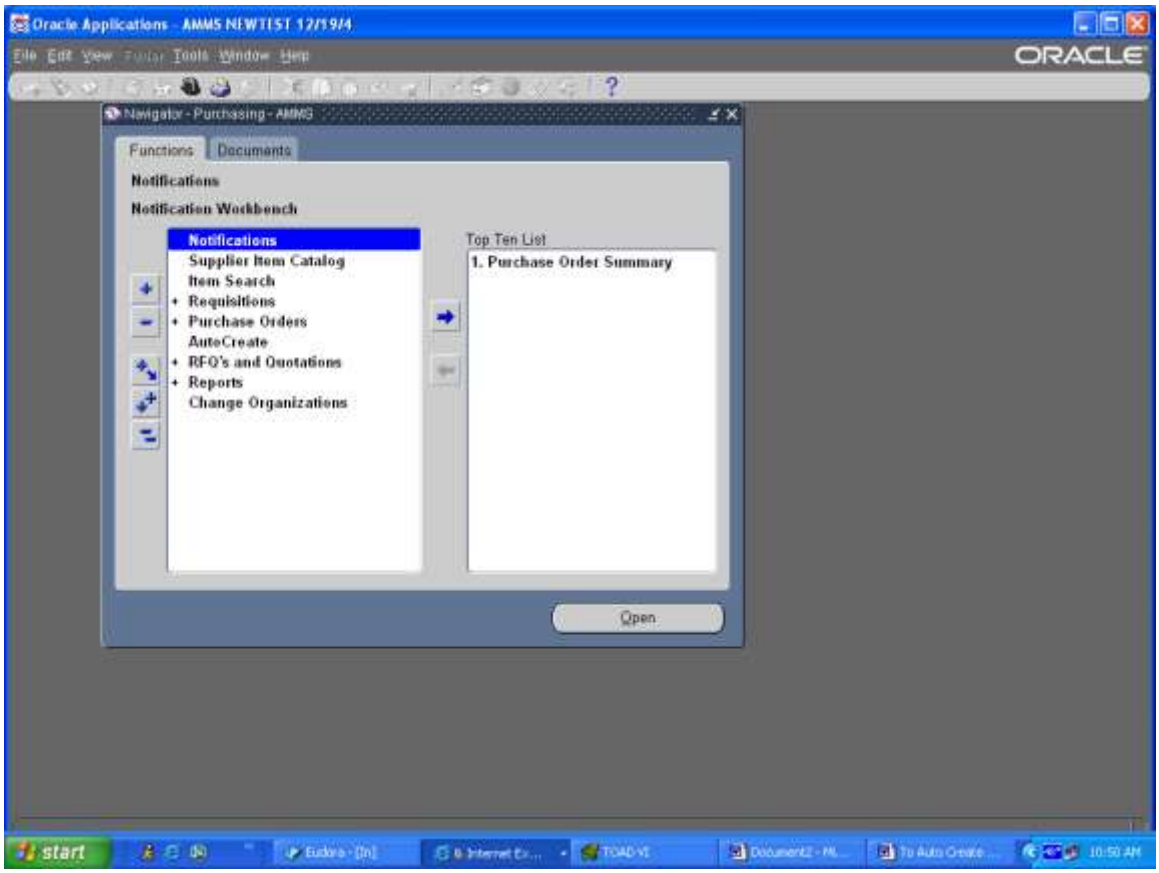
Audience

Buyers and Material Coordinators

Prepared By	Theresa Coulson
Creation Date:	01/03/2004
Document Name	Auto Create Blanket Release.doc
Version	3
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Purchasing.	

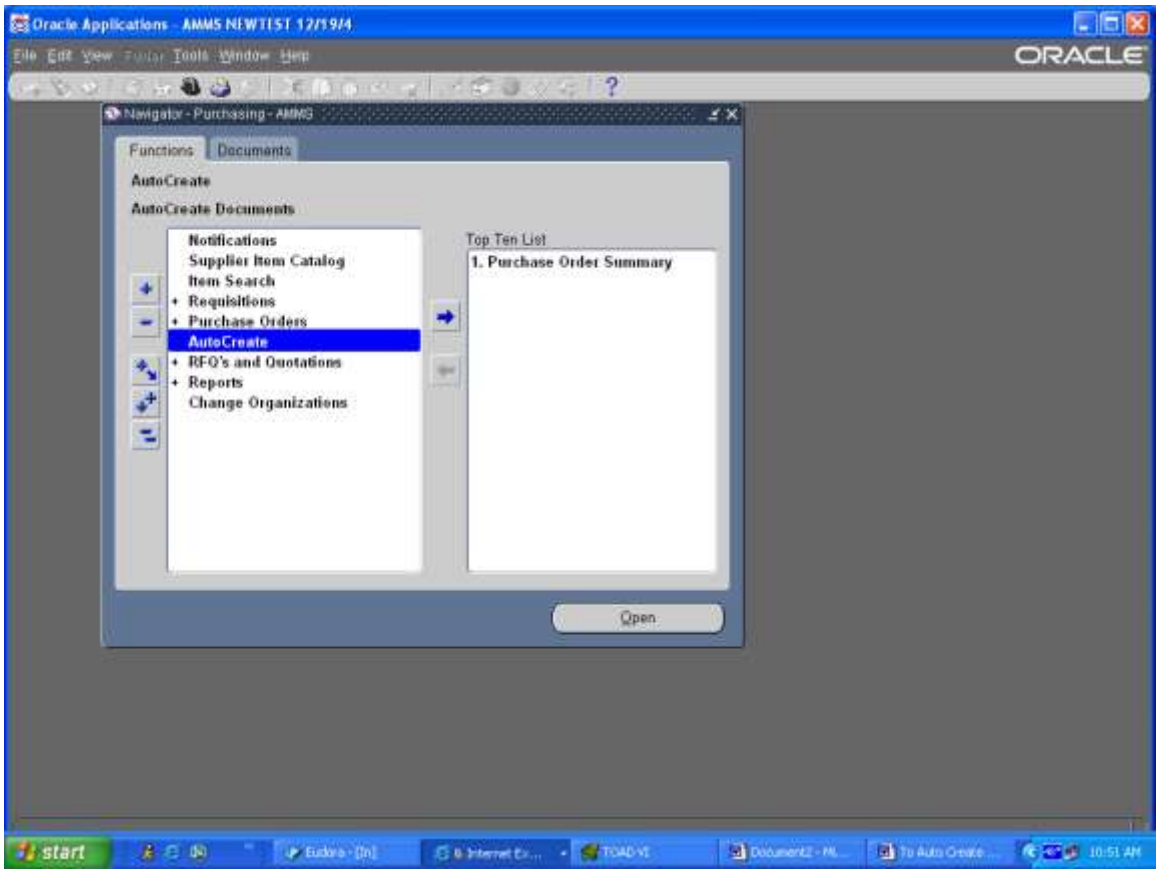
Step Description: Sign onto Oracle and select the Purchasing AMMS responsibility

Expected Results: The Purchasing AMMS main menu will appear



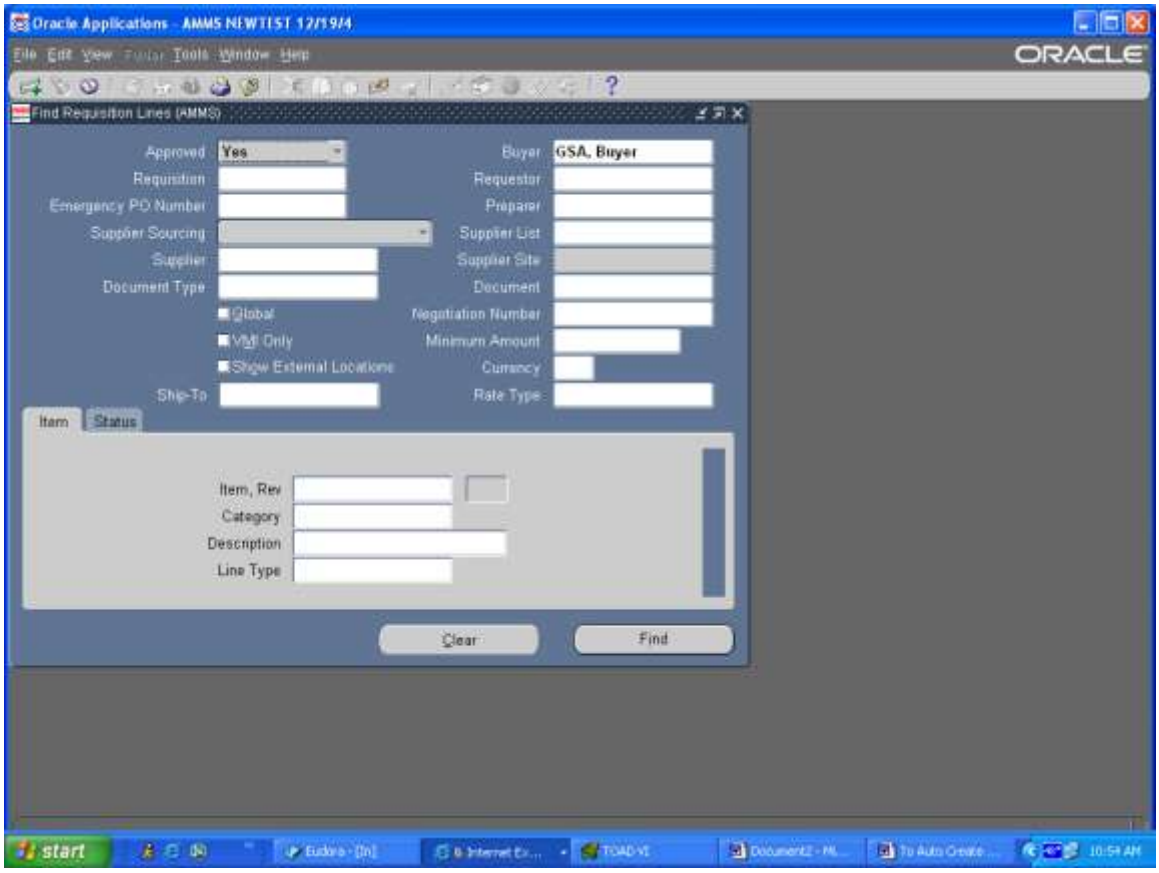
Step Description: Select from the Purchasing AMMS main menu Auto Create and click on the Open button

Expected Results: The Find Requisition Lines window will appear



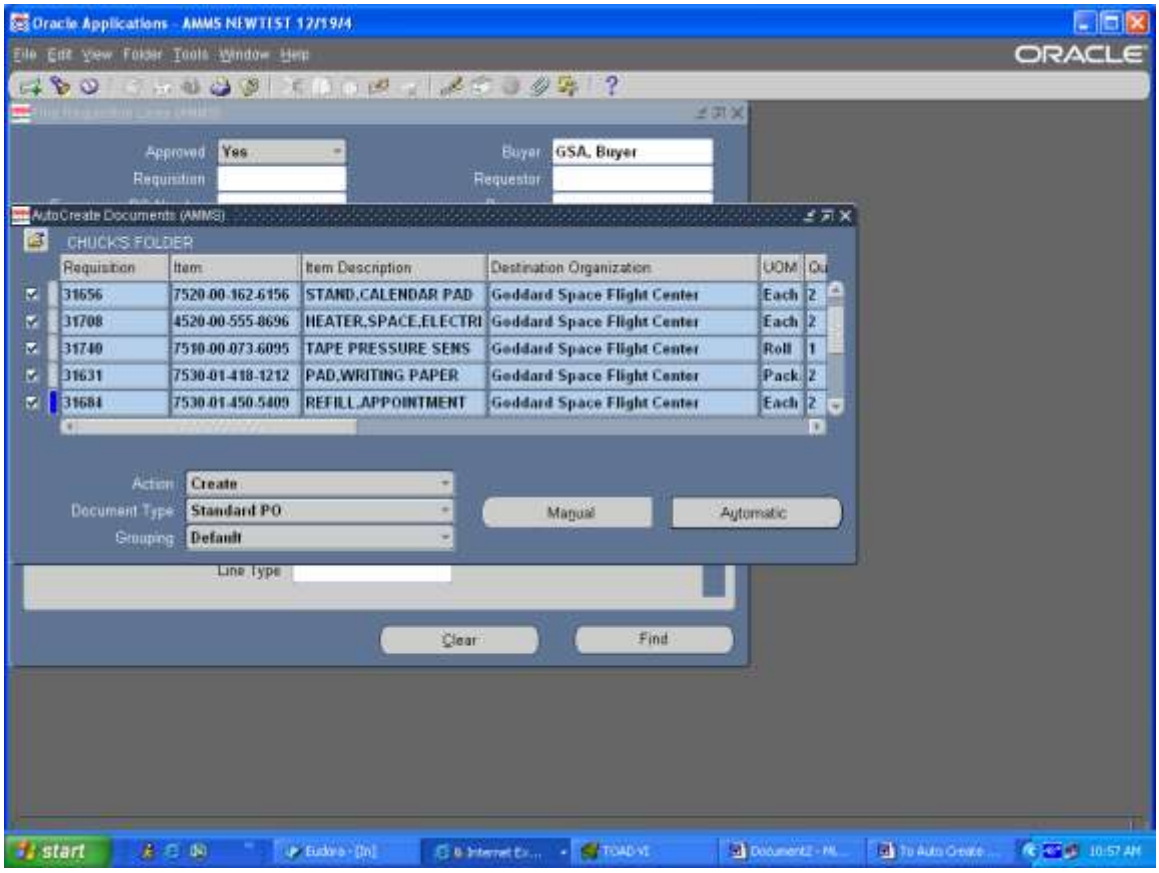
Step Description: Make sure the Approved field is set to Yes. In the Buyer field enter the name of the buyer who requisitions you want to access. Click on the Find Button

Expected Results: The Auto Create Documents window will open



Step Description: Select the requisitions you want to put onto a Purchase Order by placing a check mark in the box to the left, the line will turn blue, you can select multiple lines

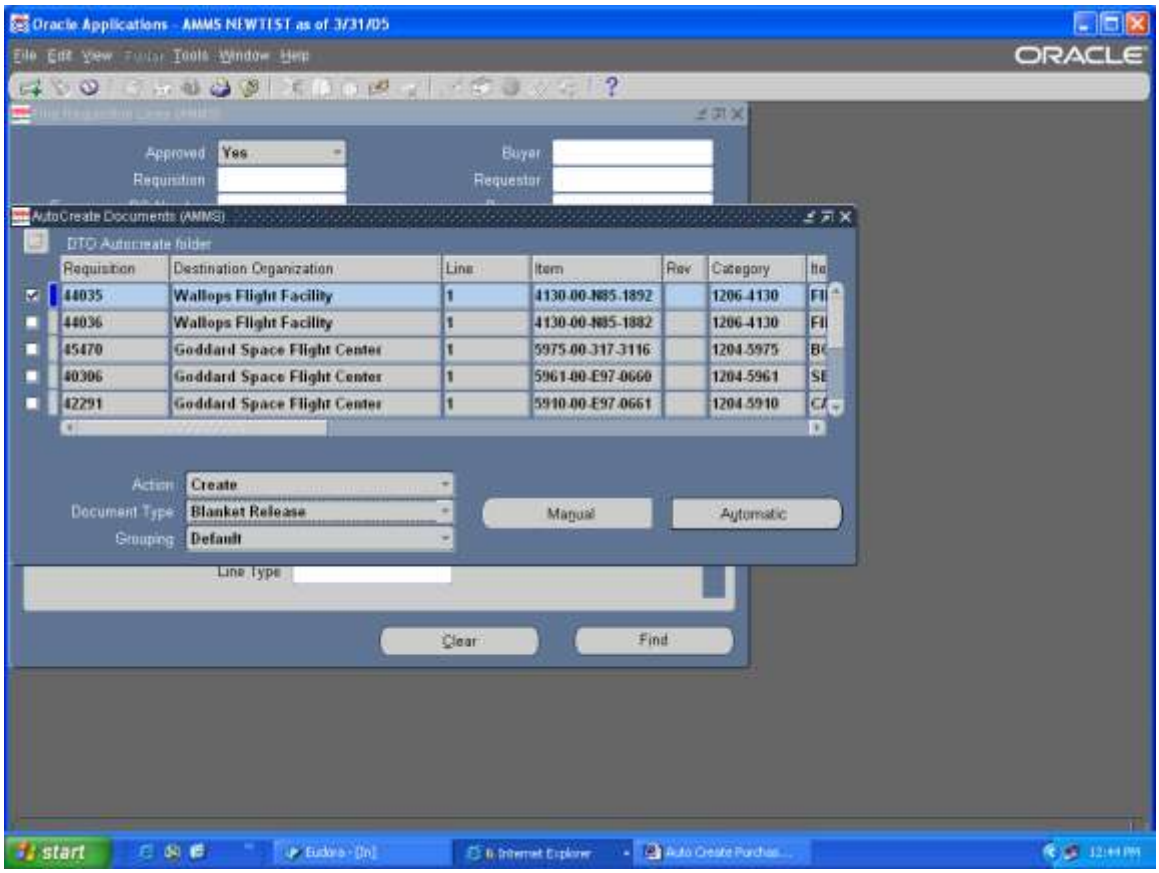
Expected Results: All lines selected will be blue



Note: This screen will give you detailed information, requisition number, item number, quantity, and the Destination Organization. Goddard and Wallops requisitions are not (normally) to be placed on the same purchase orders. So please take not of the Destination Organization when creating your purchase orders.

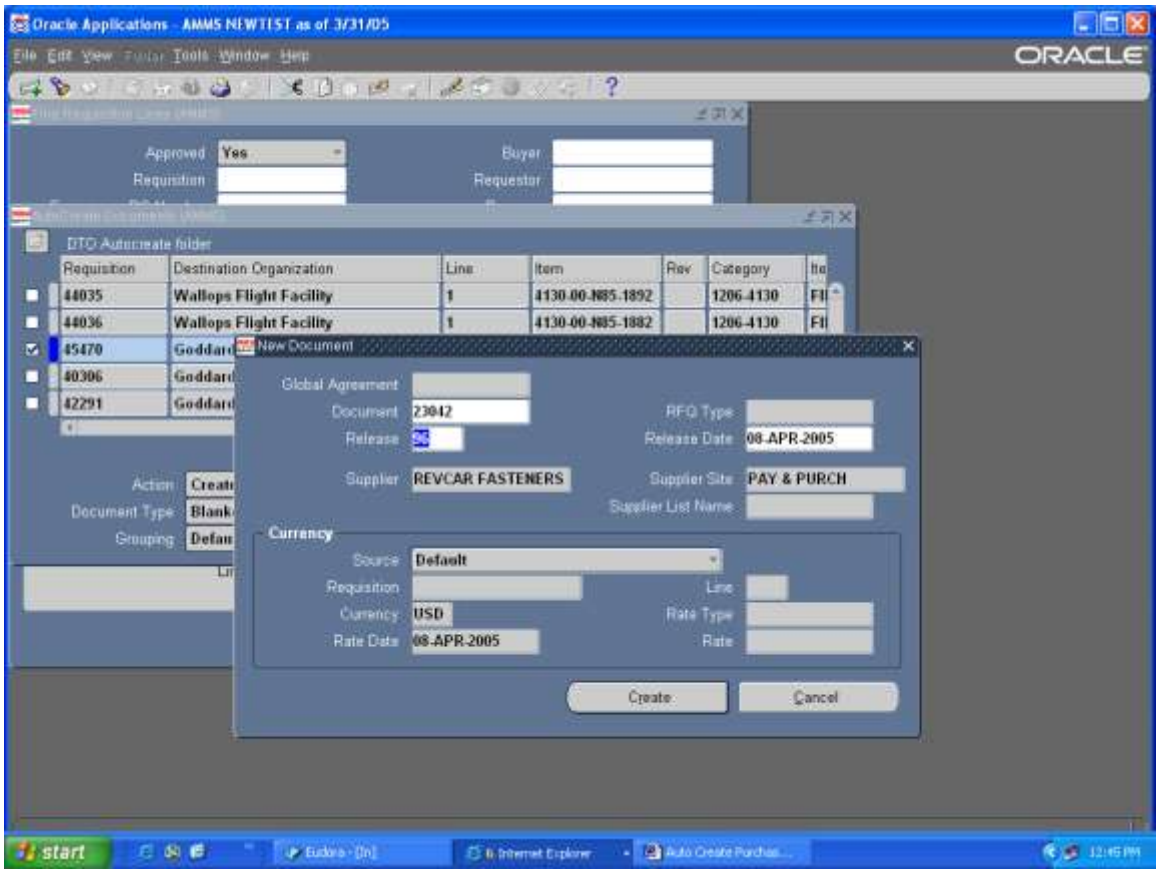
Step Description: At the bottom of the Auto Create Documents window, make sure that the Action is set to Create, the Document Type is set to Blanket Release and the Grouping is Default. Now click on the Automatic button.

Expected Results: The New Documents window will appear



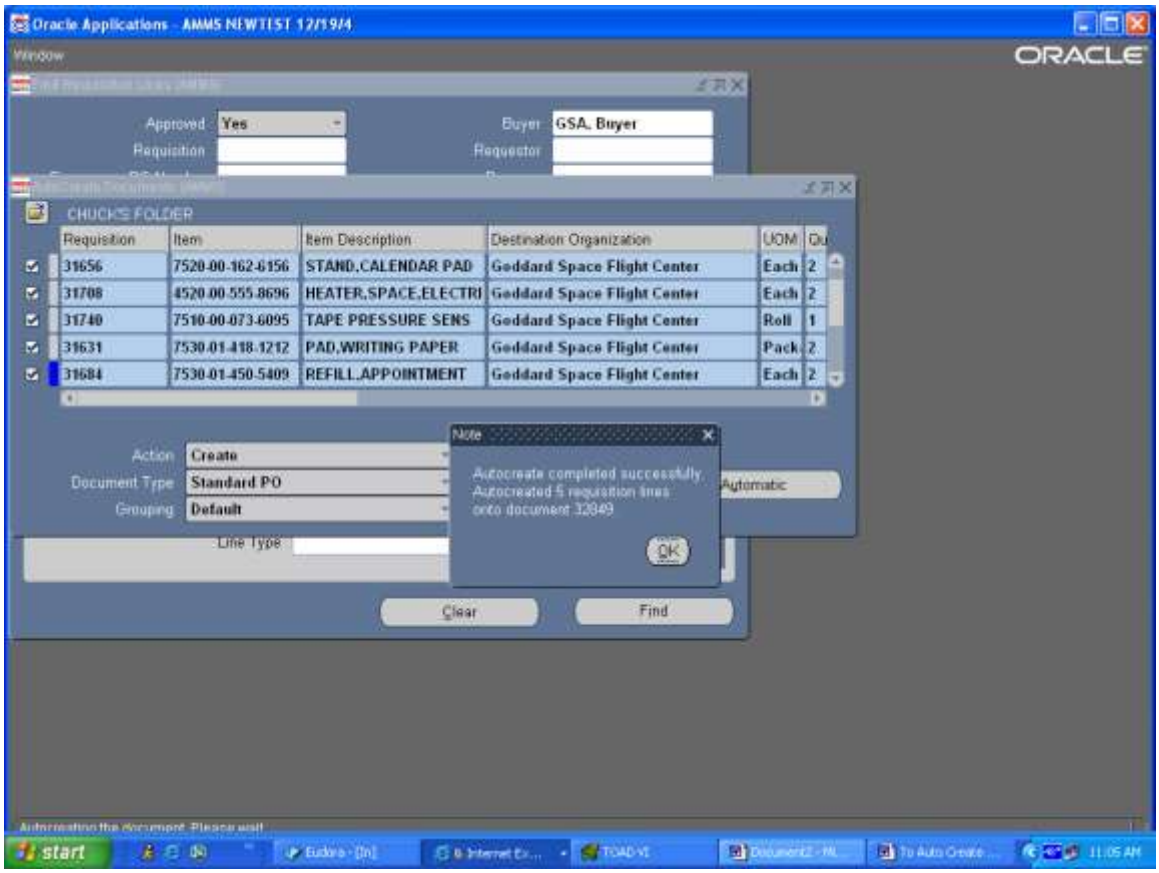
Step Description: At the New Documents window in the Document field enter the Blanket Purchase Order Number that exists in Oracle Once you have populated the Document field, the release number will default, along with the Supplier information. Click on the Create Button.

Expected Results: A Note window will appear



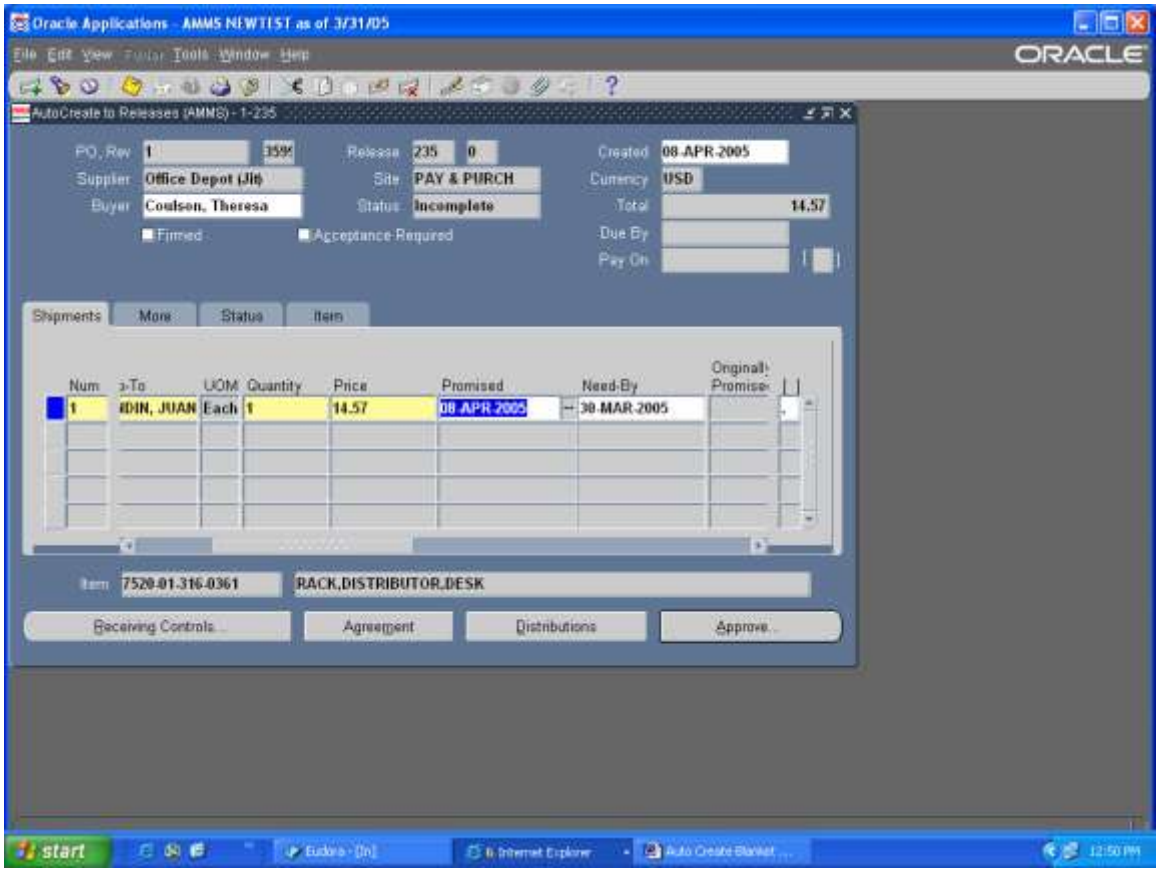
Step Description: At the Note window you will see your Oracle Purchase Order number, the Release Number and how many requisitions are on the Blanket Release. Please take note of this information. Click OK to the Note window.

Expected Results: The Auto Create to Purchase Order window will appear



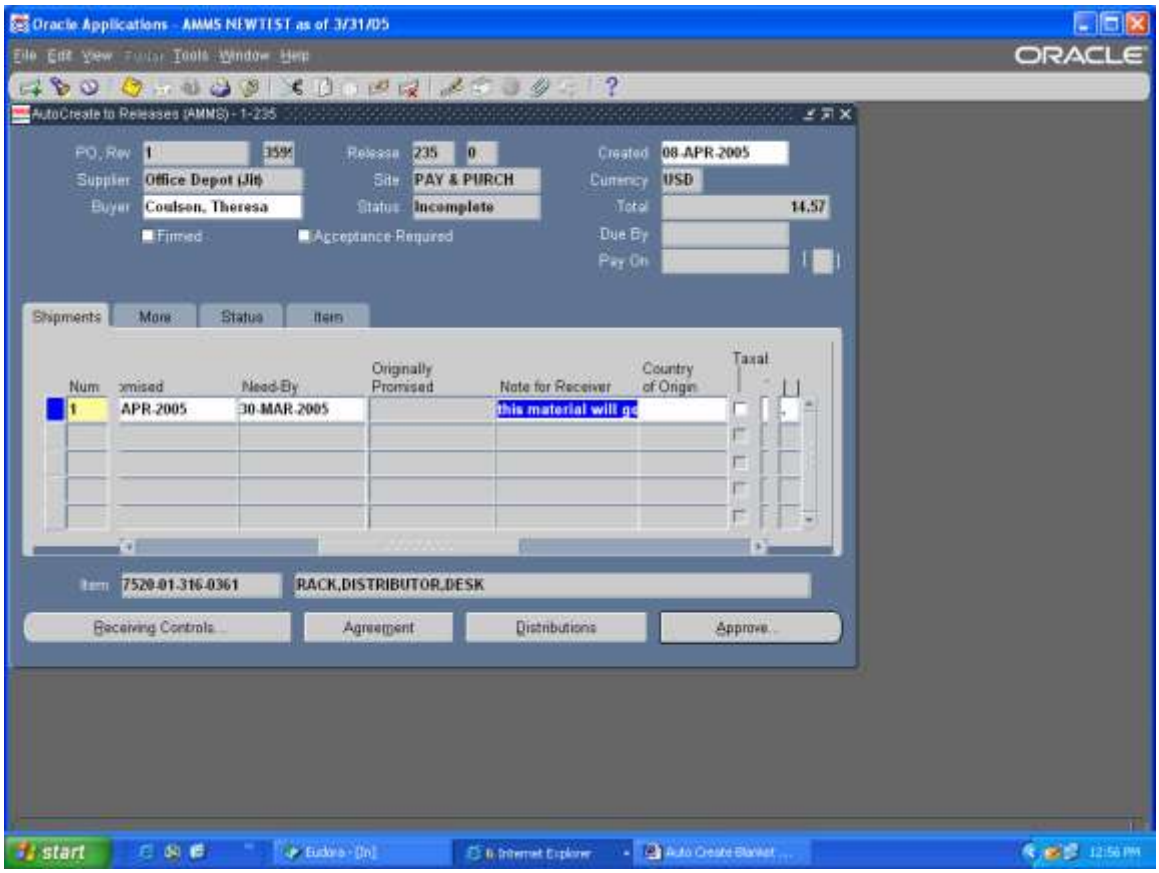
Step Description: **At the Autocreate Release window scroll over to the Promised By date and click on the LOV and select a date, tab to the Need by field enter the Estimated Delivery Date.**

Expected Results: **Fields will be populated with dates**



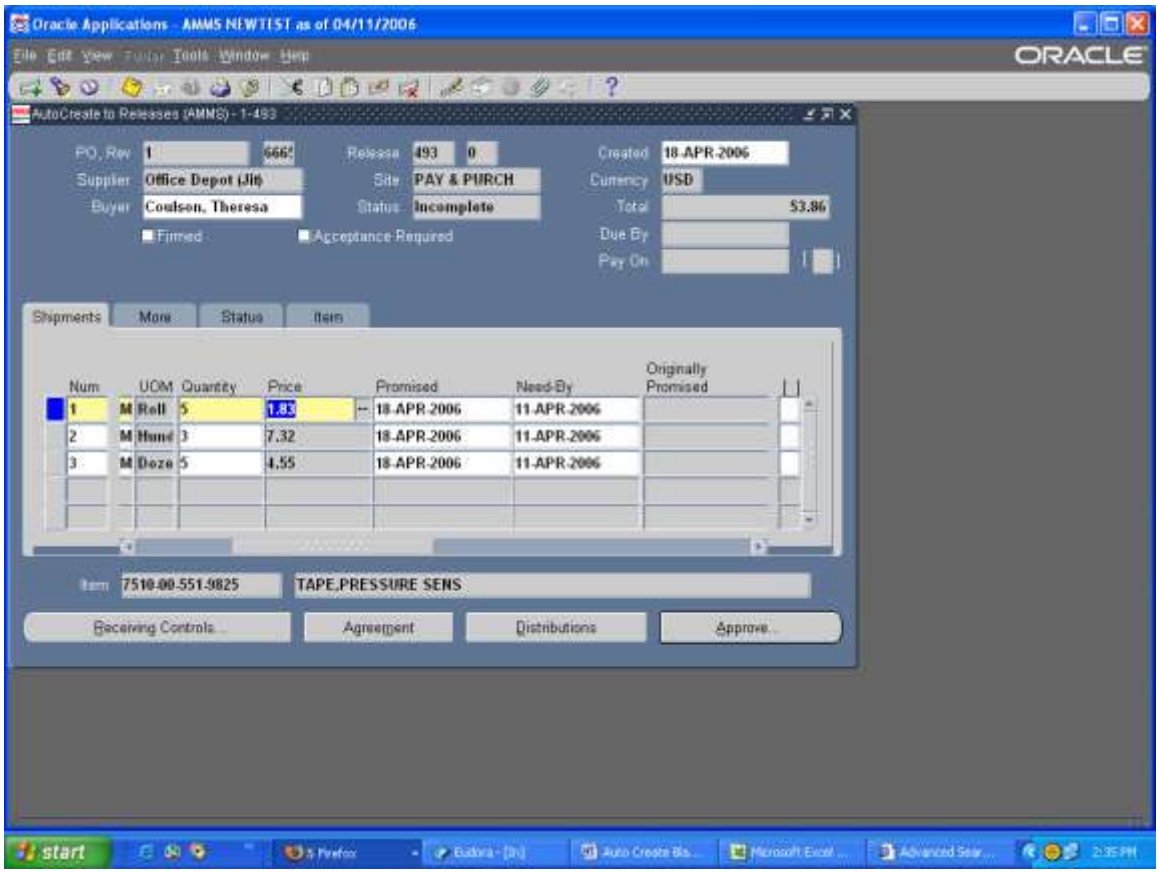
Step Description: Scroll over to the Note to Receiver and put any special notes for the inspectors.

Expected Results: Field will be populated



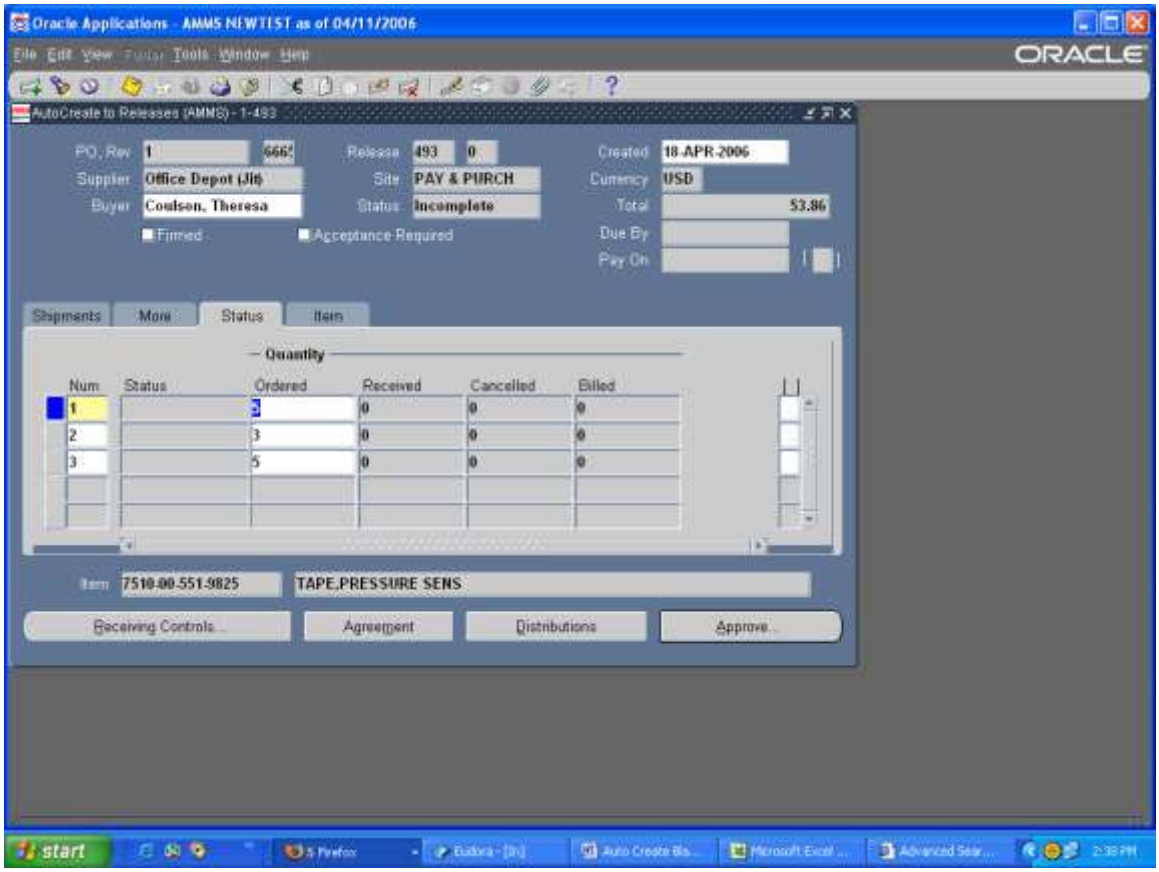
Step Description: Use the scroll bar to move to the Price field update this cost if necessary.

Expected Results: Fields will be populated



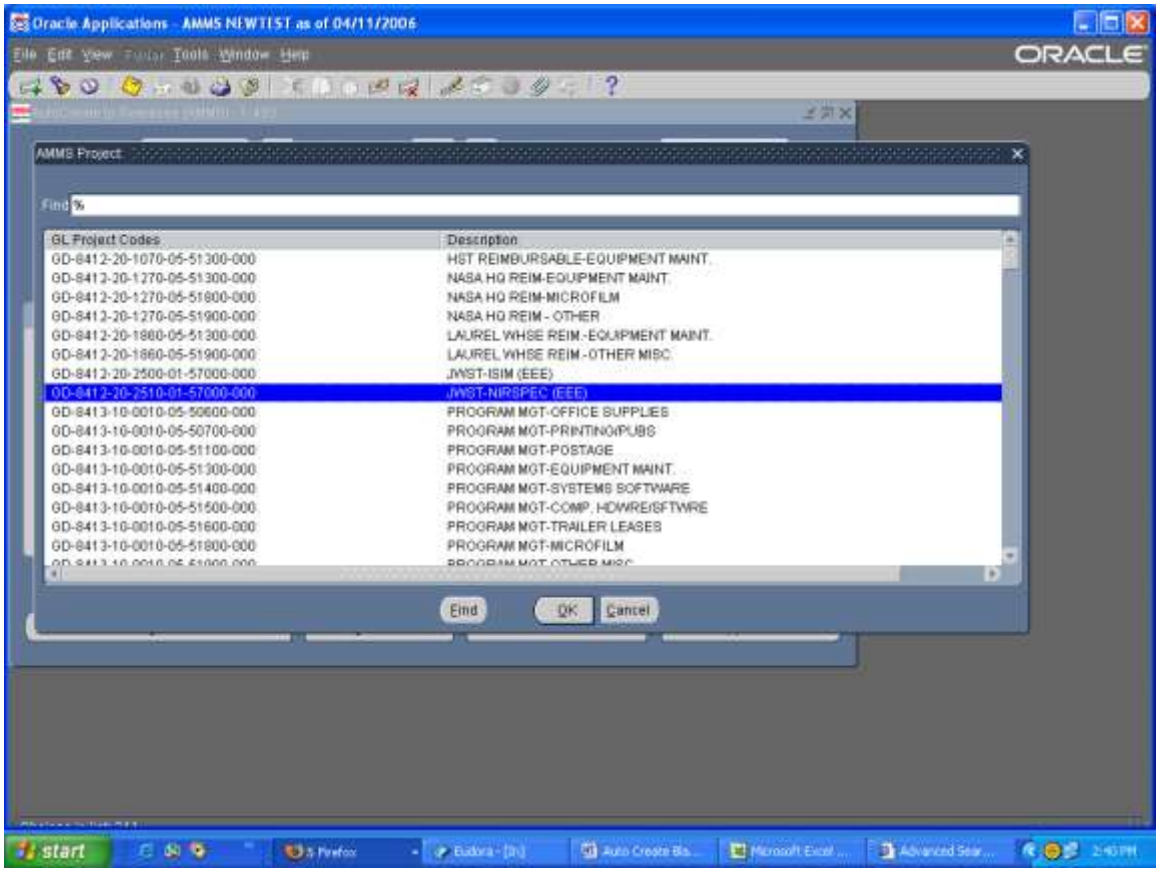
Step Description: At the end of the line click in the [ ] field

Expected Results: PO Lines Location window will appear



Step Description: From the AMMS Project field click on the LOV and select the appropriate GL number for the release you are creating, click OK

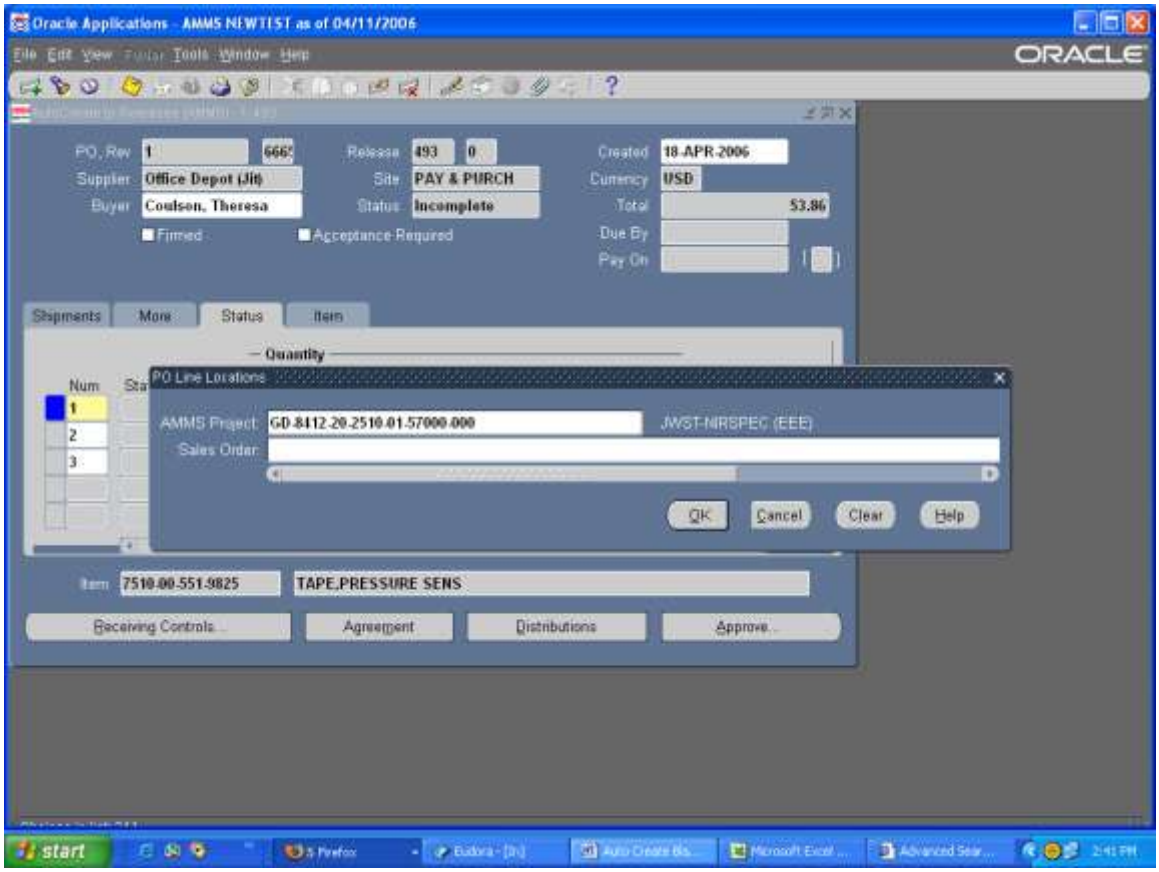
Expected Results: AMMS Project field will be populated



Note: Enter a GL project number for each line on the release.

Step Description: Click OK to the PO Lines Location window

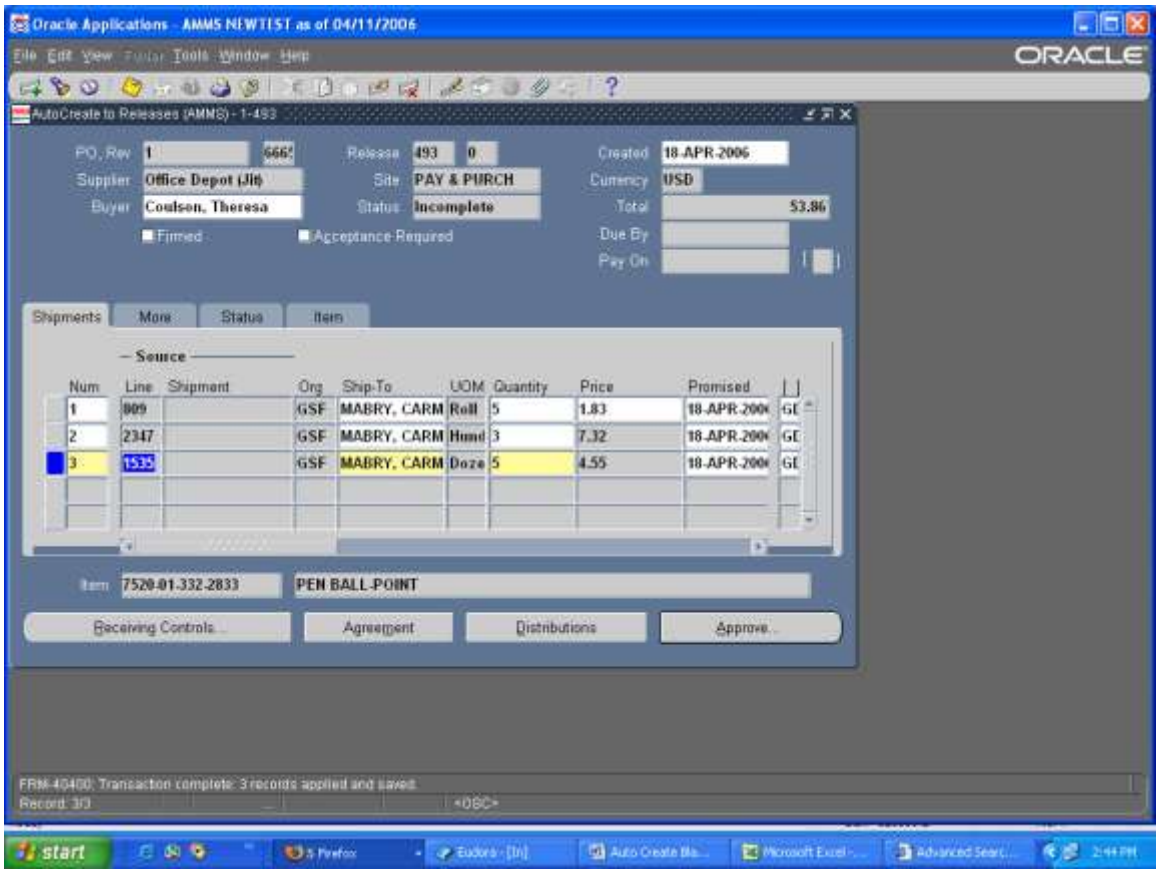
Expected Results: Return to Autocreate to Release window



Note: Enter a GL project number for each line on the release.

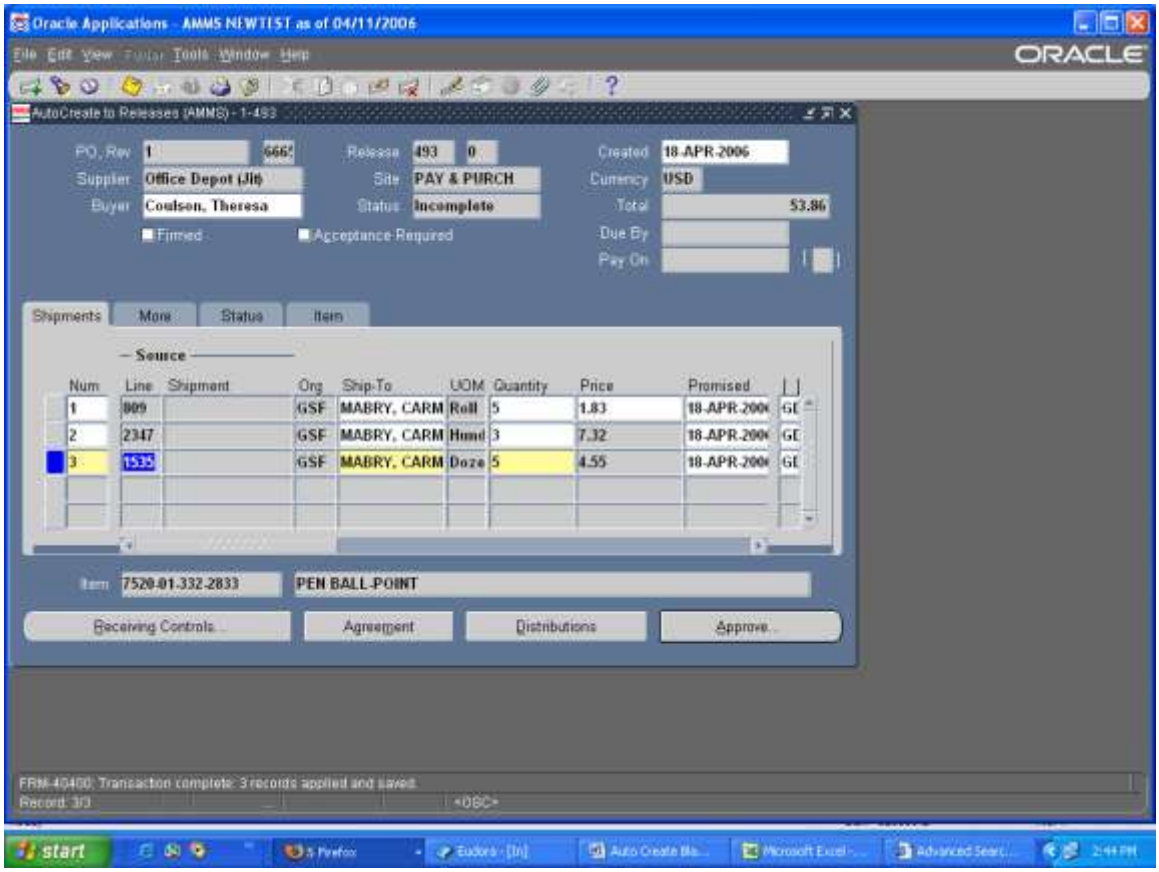
Step Description: Once you have entered a GL project number for each line on the release, Save your work

Expected Results: Transactions Saved and Applied



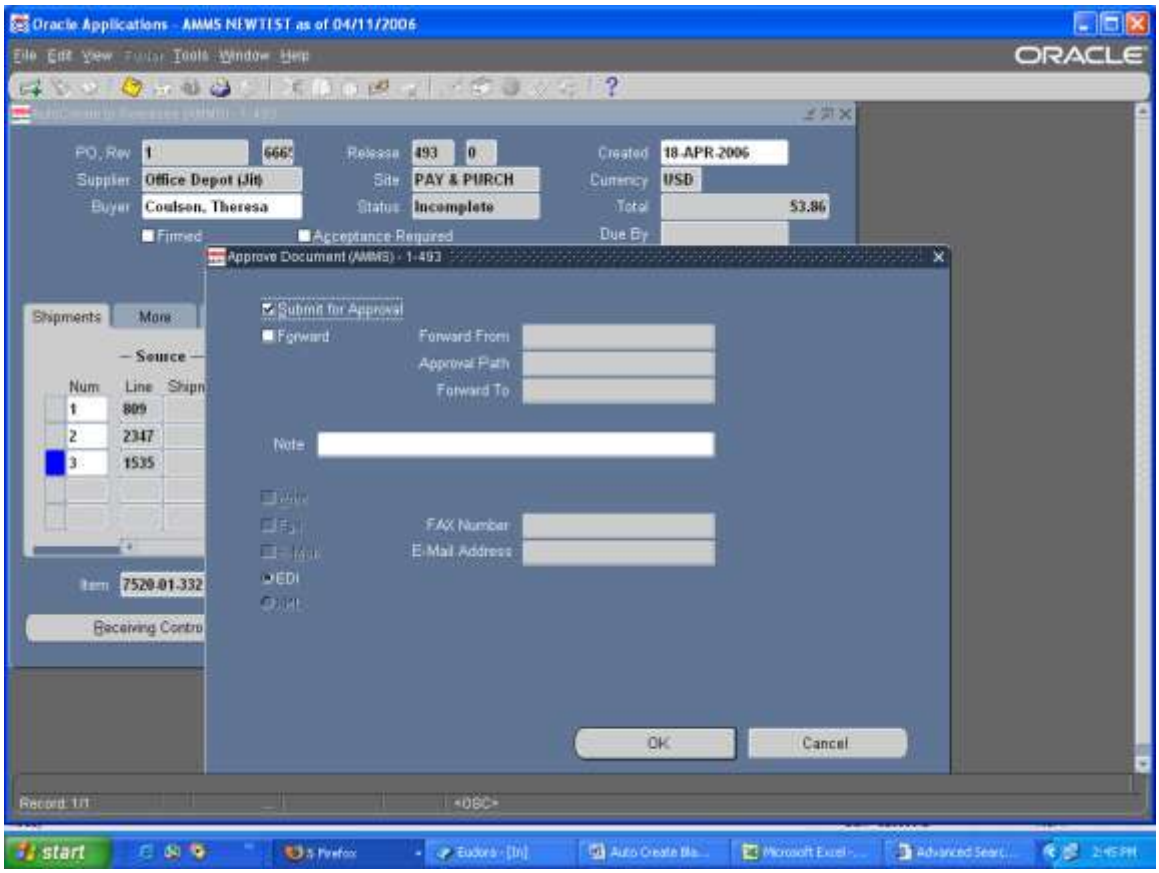
Step Description: Click on the Approve button.

Expected Results: The Approval Documents window will open



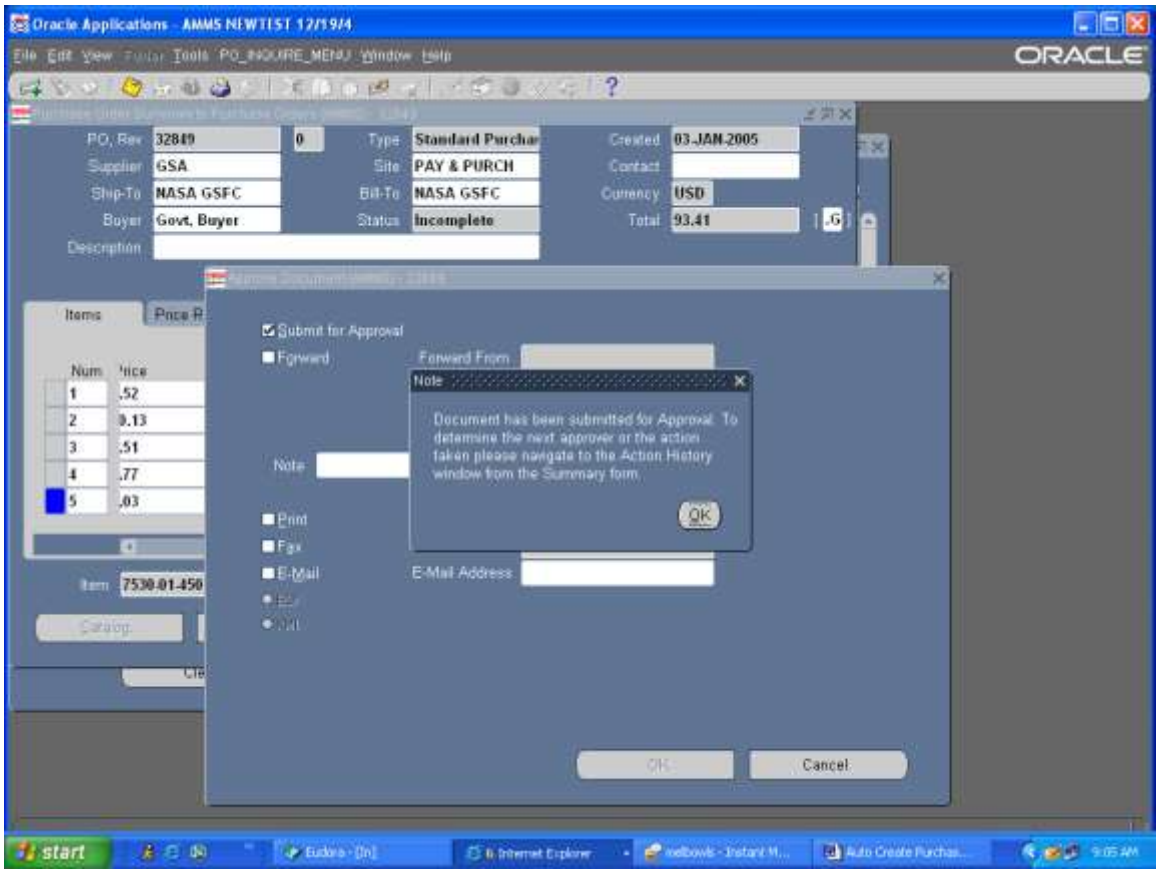
Step Description: Remove the Check Mark from the Email box and click on the OK button.

Expected Results: A Note window will appear

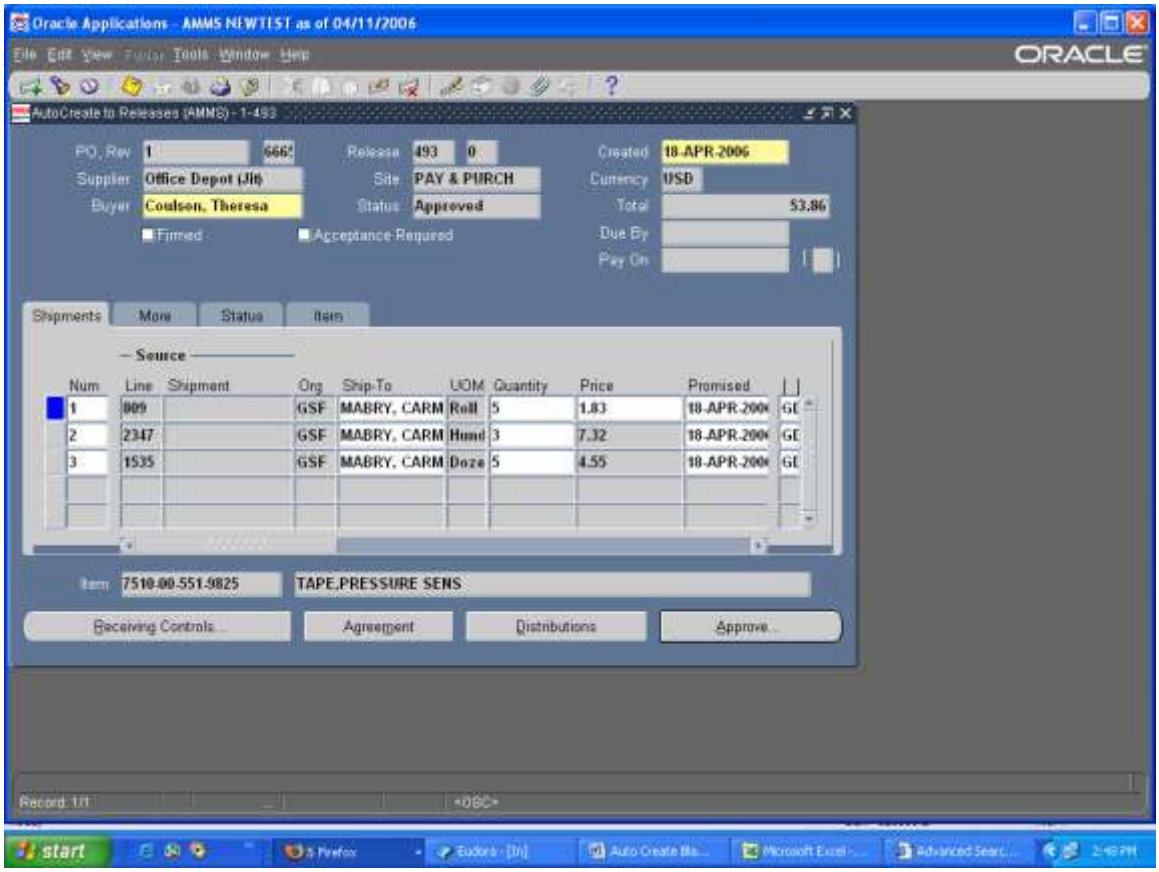


Step Description: The Note window tells you that the "document has been submitted for approval" click OK to the Note window.

Expected Results: You will return to the Purchase Order Summary to Purchase Order window



Step Description: Take note that the Status on the Release is now Approved



You are complete. You have created your purchase order release.

AMMS TRAINING SCRIPT
Auto Create EEE Blanket Release

Purpose

The purpose of this training script is to how to create a release against a blanket purchase order set up for Project Parts.

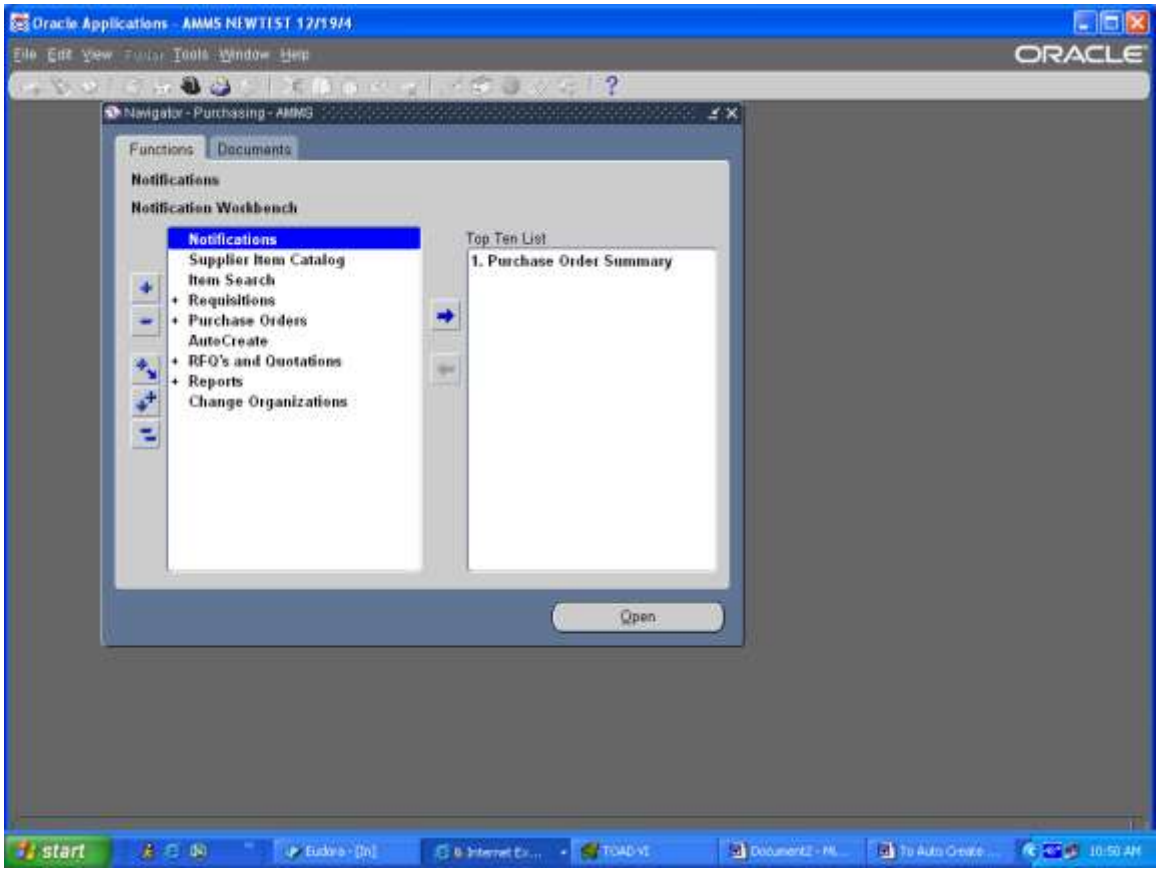
Audience

Project Parts Buyers

Prepared By	Theresa Coulson
Creation Date:	08/23/2005
Document Name	Auto Create EEE Blanket Release.doc
Version	4
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Purchasing.	

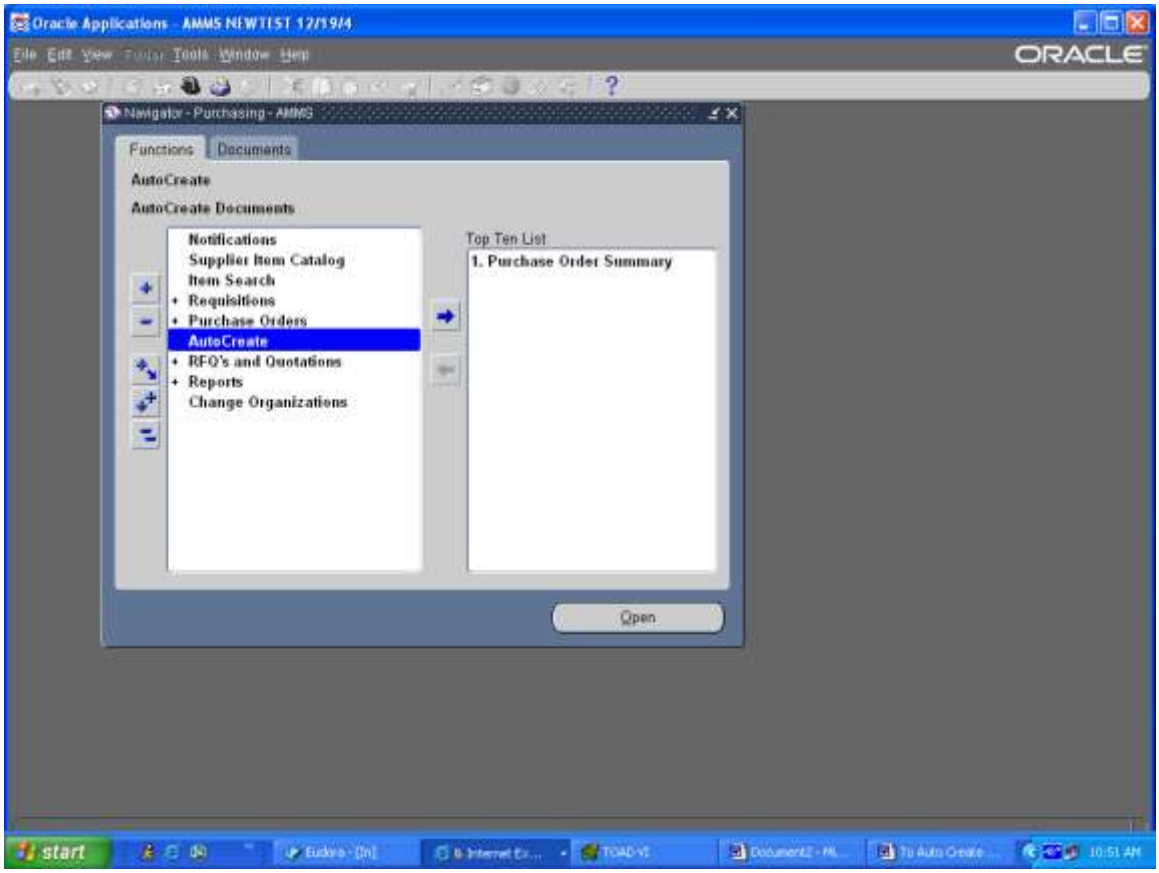
Step Description: Sign onto Oracle and select the Purchasing AMMS responsibility

Expected Results: The Purchasing AMMS main menu will appear



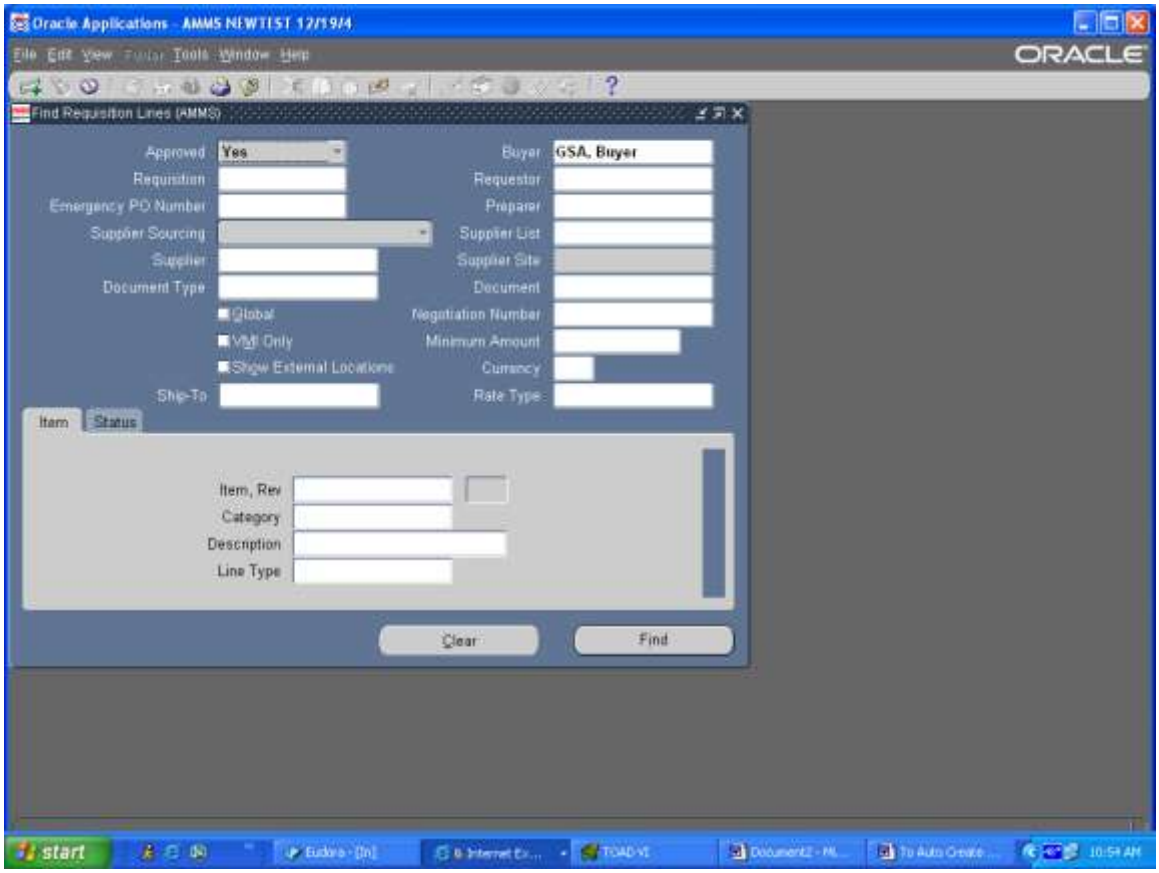
Step Description: Select from the Purchasing AMMS main menu Auto Create and click on the Open button

Expected Results: The Find Requisition Lines window will appear



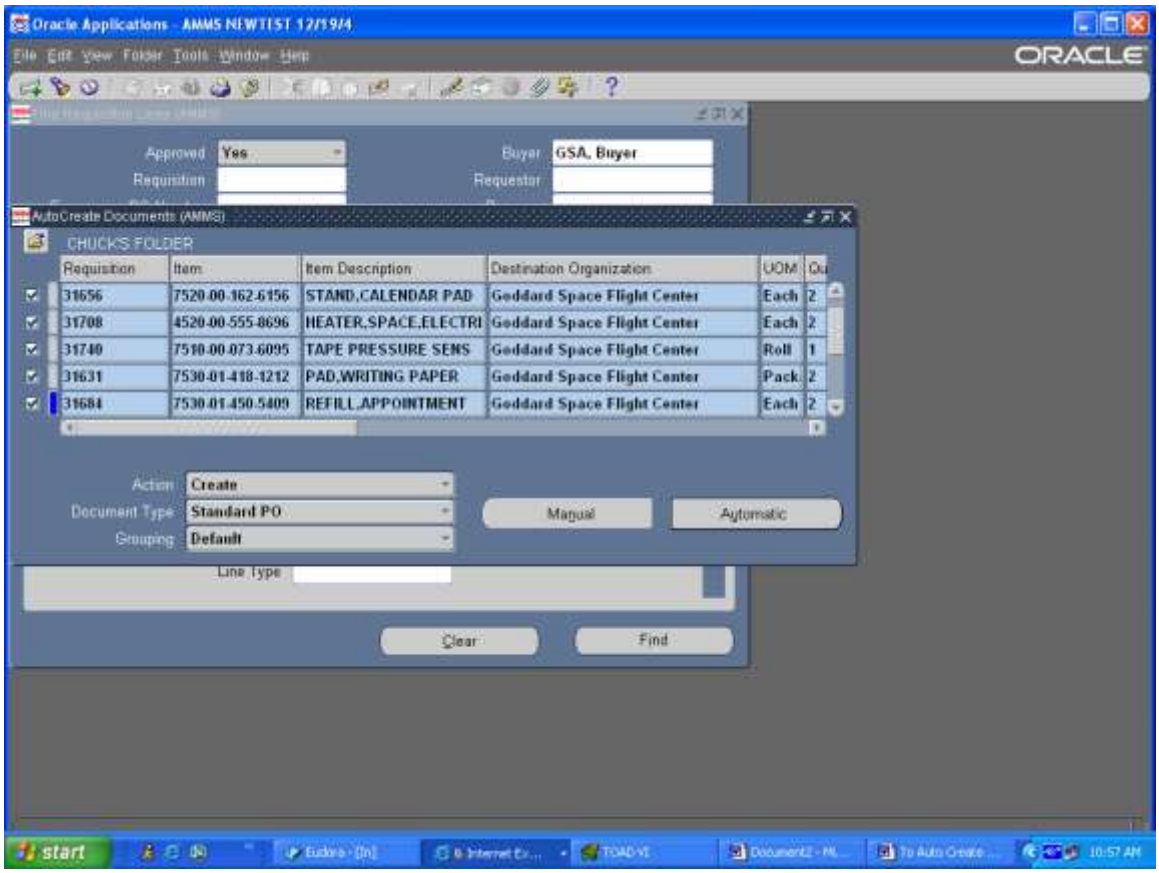
Step Description: Make sure the Approved field is set to Yes. In the Buyer field enter the name of the buyer who requisitions you want to access. Click on the Find Button

Expected Results: The Auto Create Documents window will open



Step Description: Select the requisitions you want to put onto the Purchase Order Release by placing a check mark in the box to the left, the line will turn blue, you can select multiple lines

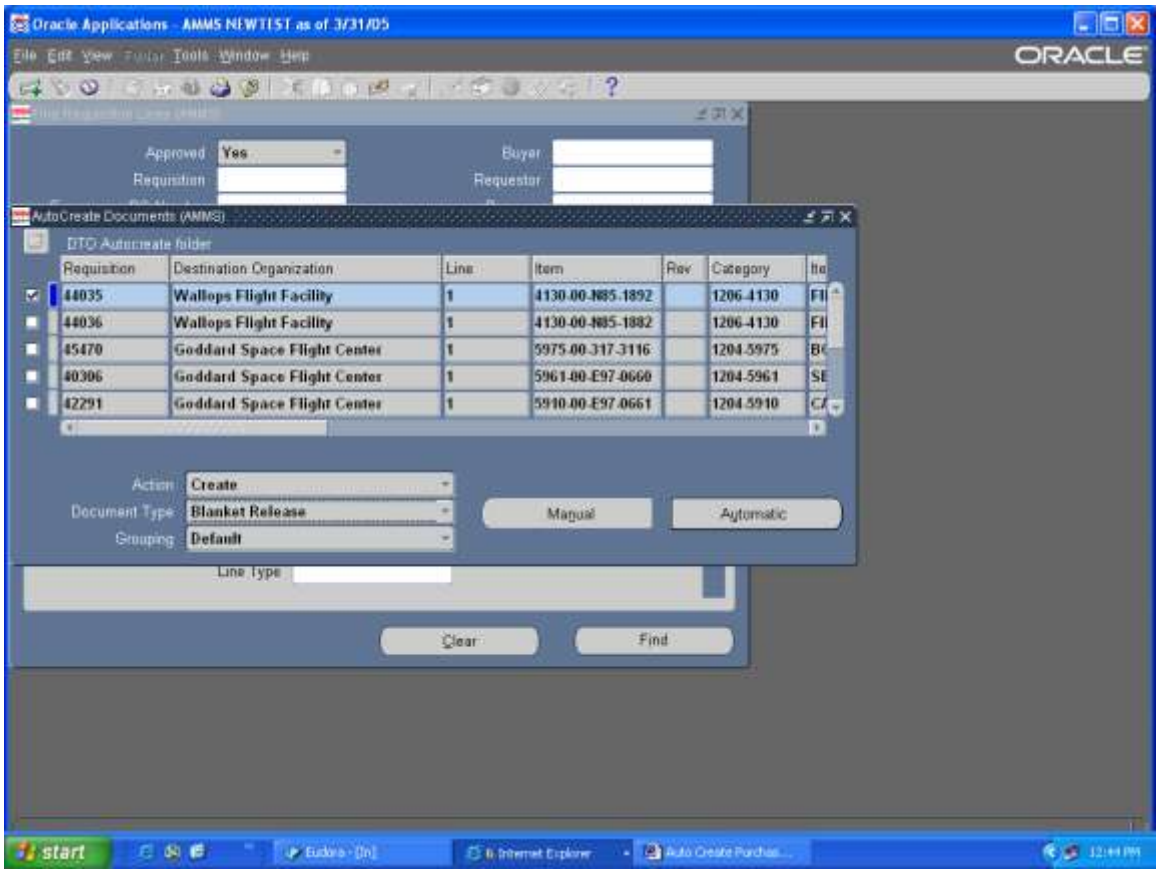
Expected Results: All lines selected will be blue



Note: This screen will give you detailed information , requisition number, item number, quantity, and the Destination Organization. Goddard and Wallops requisitions are not (normally) to be placed on the same purchase orders. So please take not of the Destination Organization when creating your purchase orders.

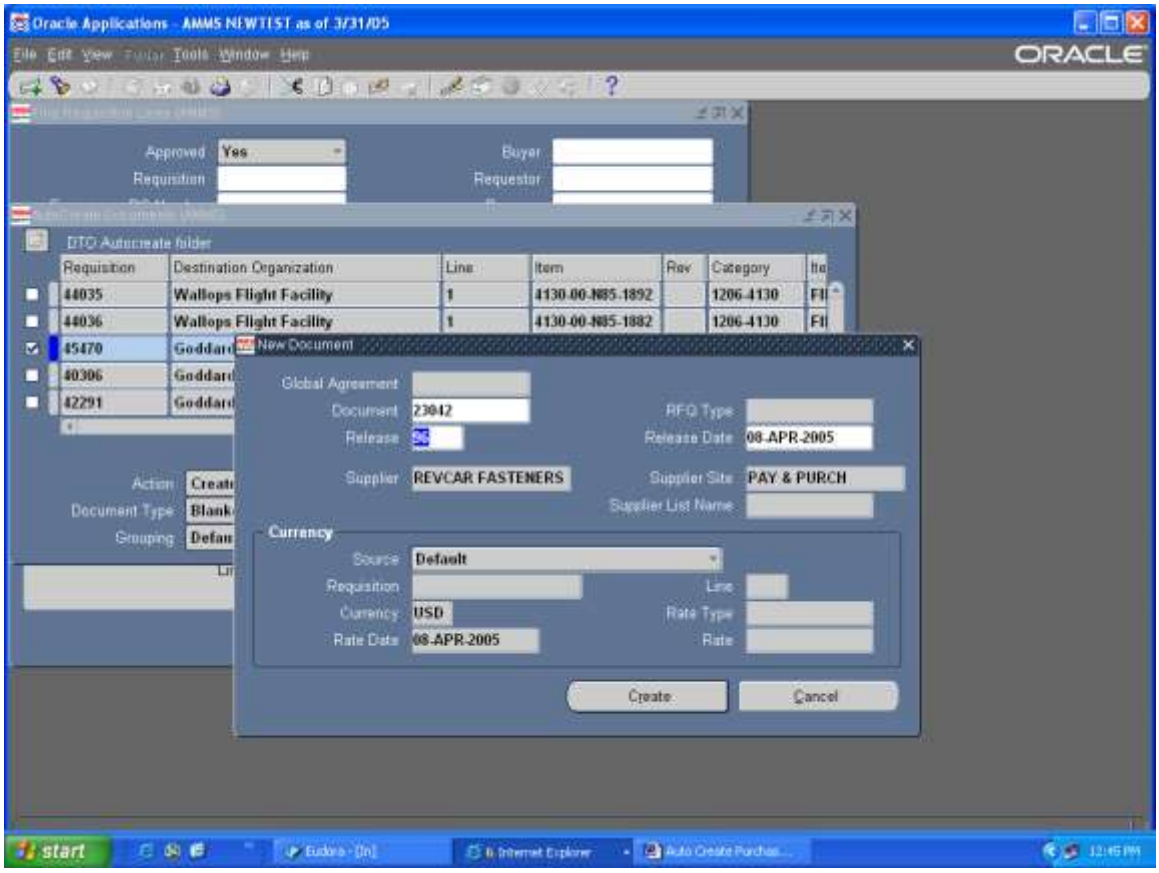
Step Description: At the bottom of the Auto Create Documents window, make sure that the Action is set to Create, the Document Type is set to Blanket Release and the Grouping is Default. Now click on the Automatic button.

Expected Results: The New Documents window will appear



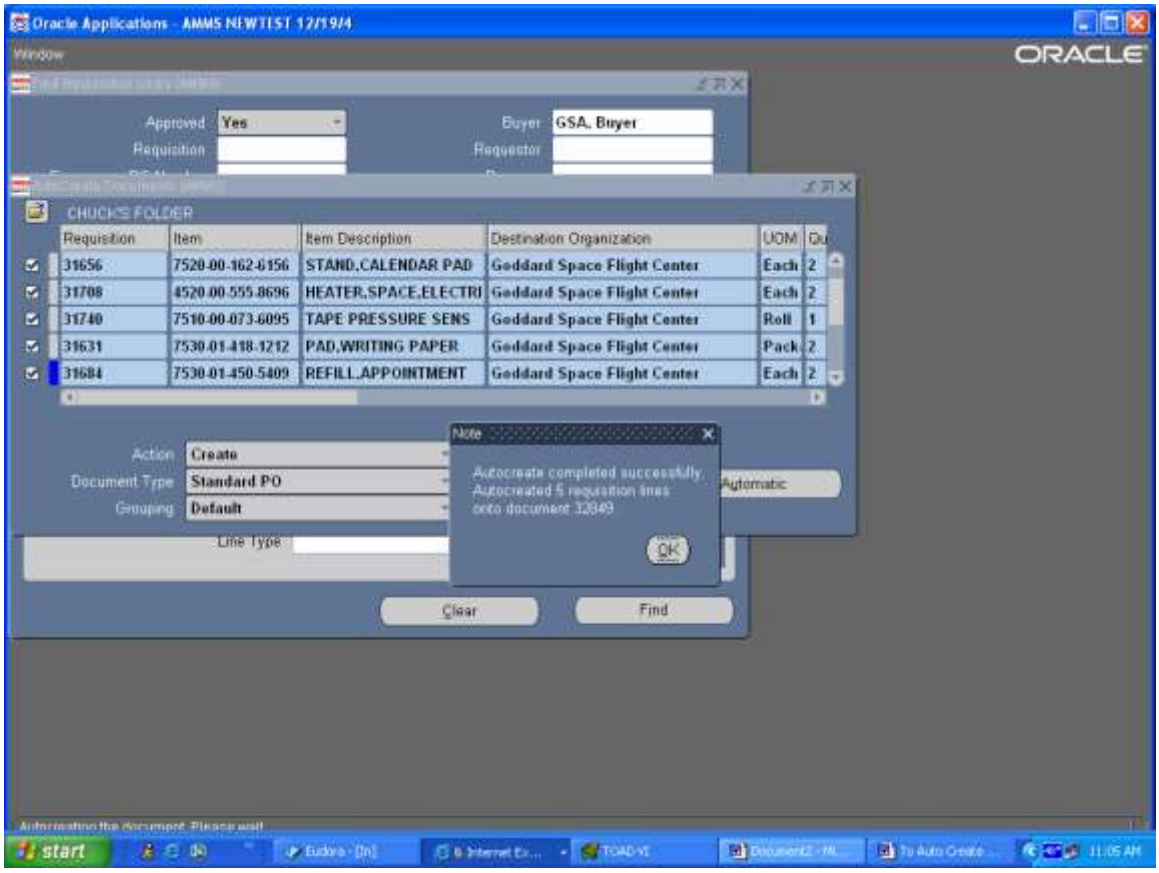
Step Description: At the New Documents window in the Document field enter the Blanket Purchase Order Number that exists in Oracle Once you have populated the Document field, the release number will default, along with the Supplier information. Click on the Create Button.

Expected Results: A Note window will appear



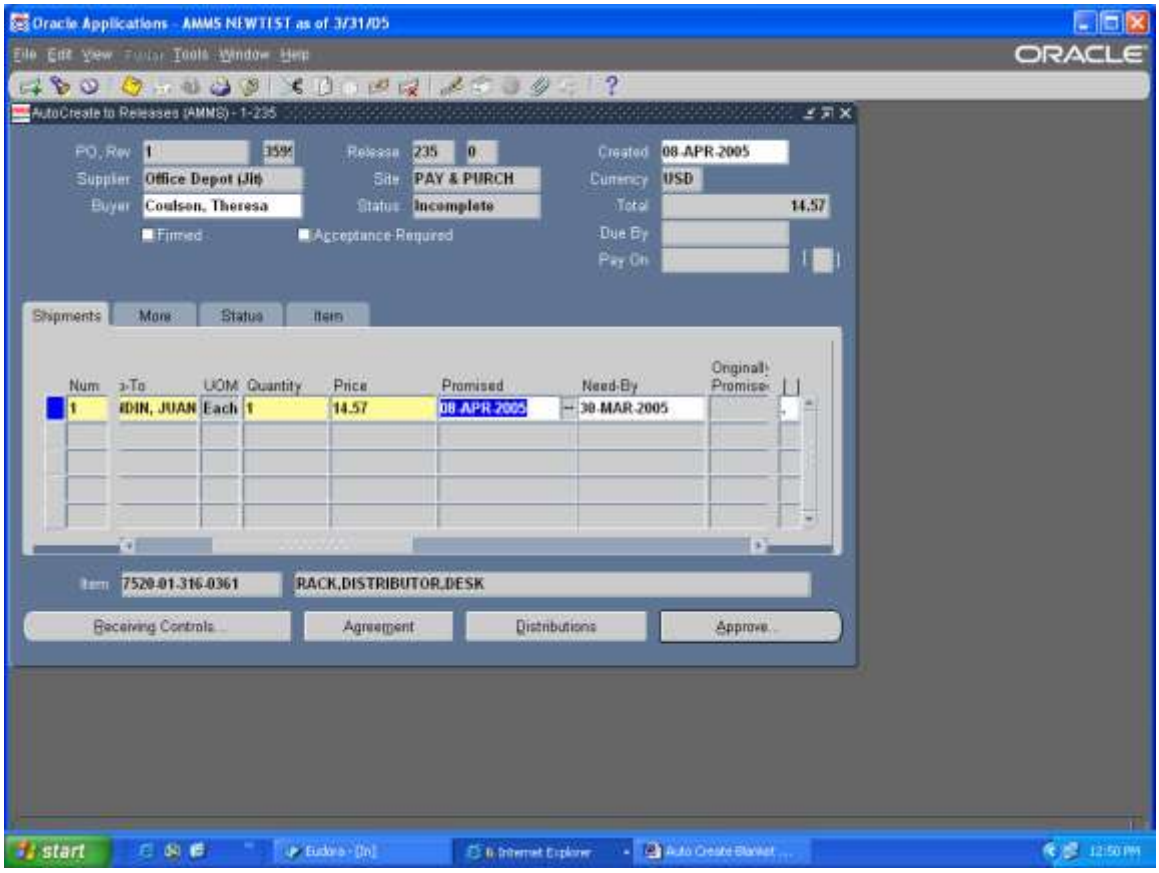
Step Description: At the Note window you will see your Oracle Purchase Order number, the Release Number and how many requisitions are on the Blanket Release. Please take note of this information. Click OK to the Note window.

Expected Results: The Auto Create to Purchase Order window will appear



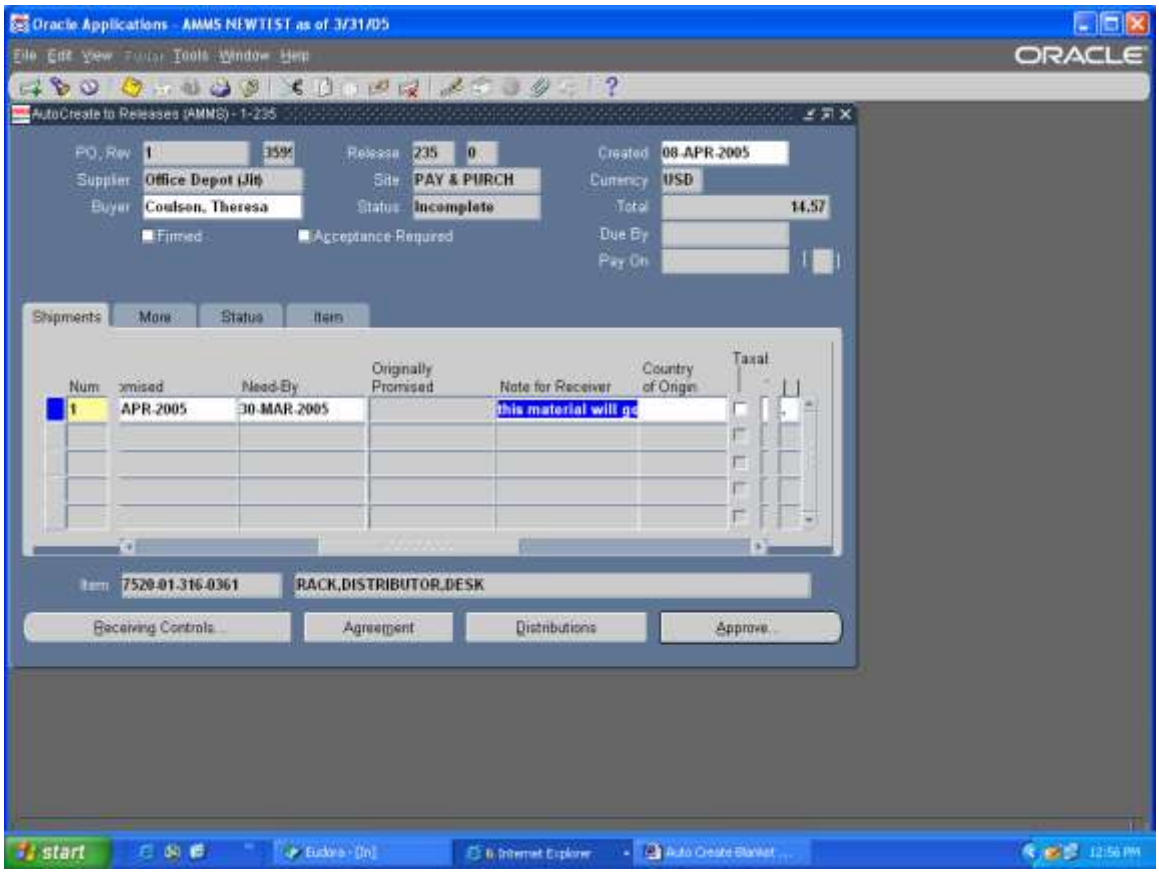
Step Description: At the Auto create Release window scroll over to field with the Promised By date and click on the LOV and select a date, tab to the Need by Date, enter the Estimated Delivery date.

Expected Results: Field will be populated with a date



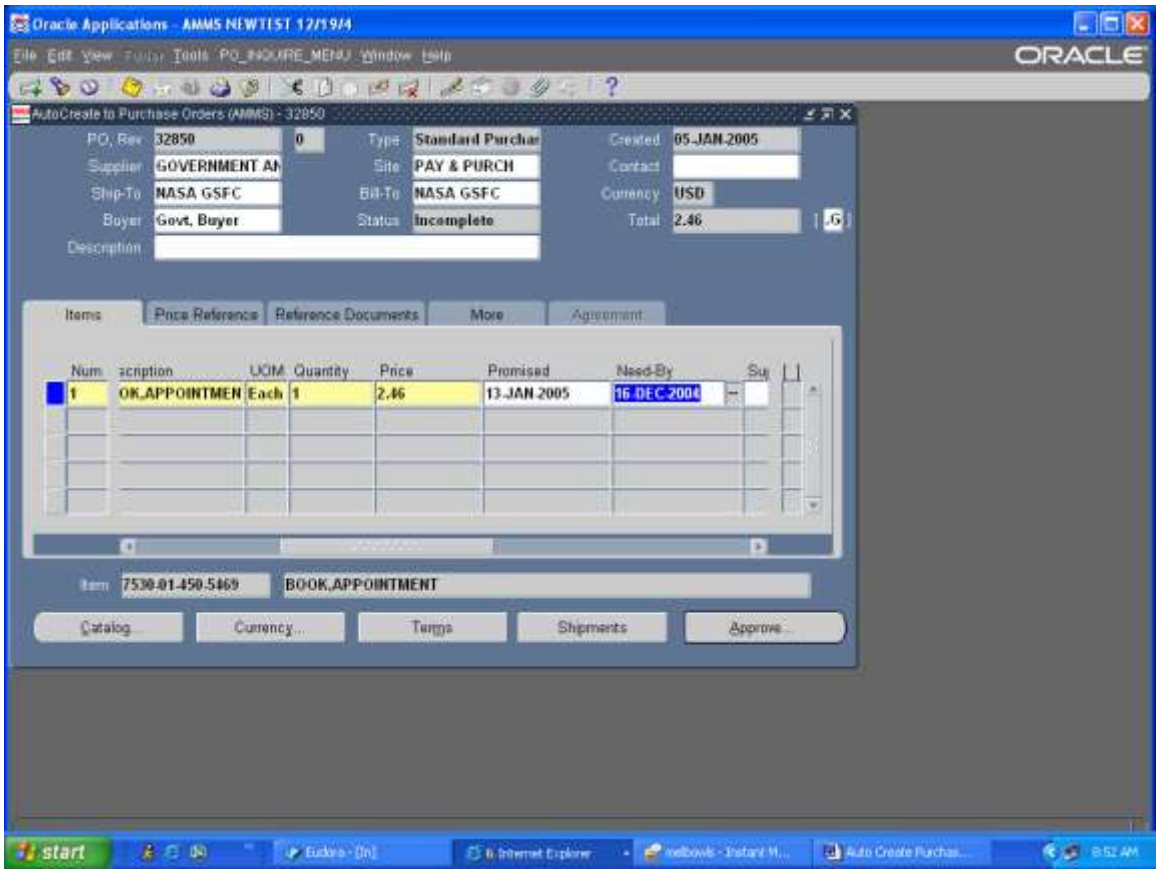
Step Description: Scroll over to the Note to Receiver and put the following information in this order: Project Name, Requisition Number, Order Number, Release Number, Part Number, and Customer Name. This information must be updated for each line on the Release.

Expected Results: Field will be populated



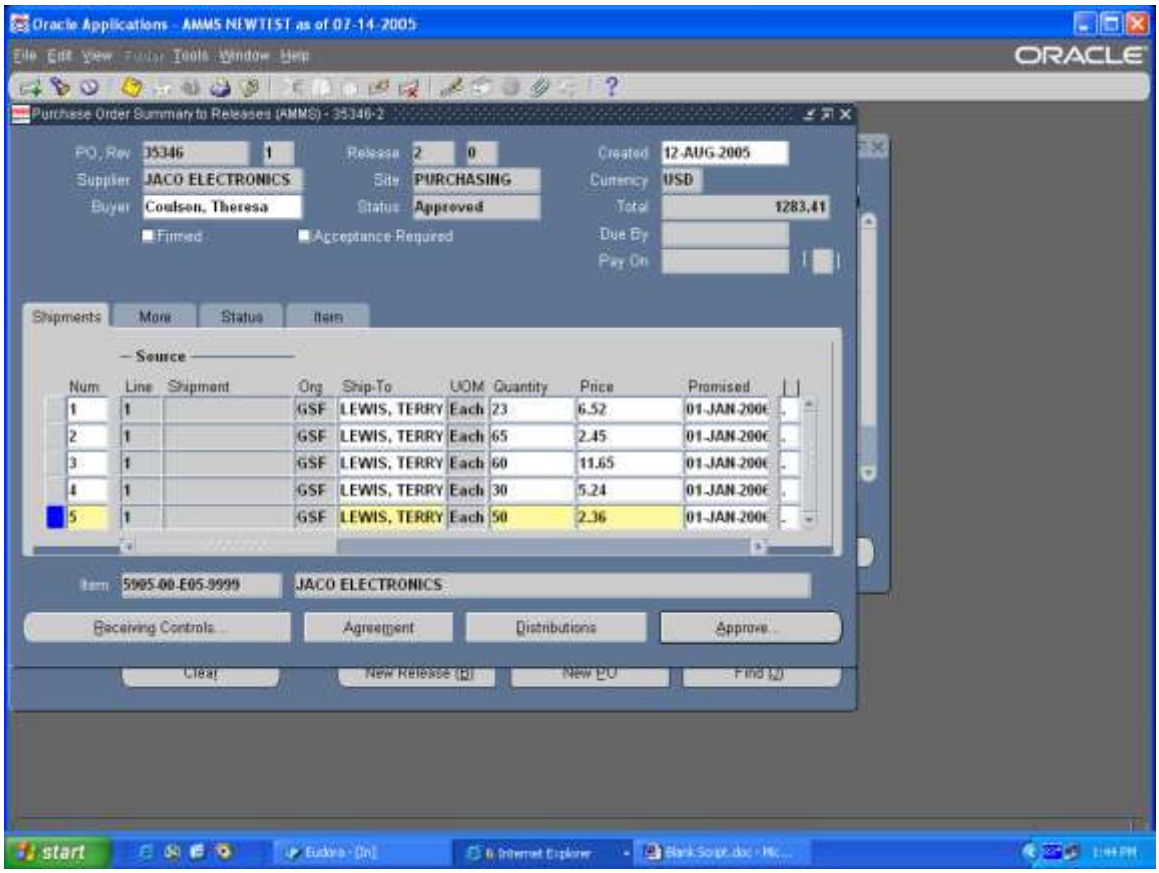
Step Description: Use the scroll bar to move to the Price field update this cost if necessary.

Expected Results: Fields will be populated



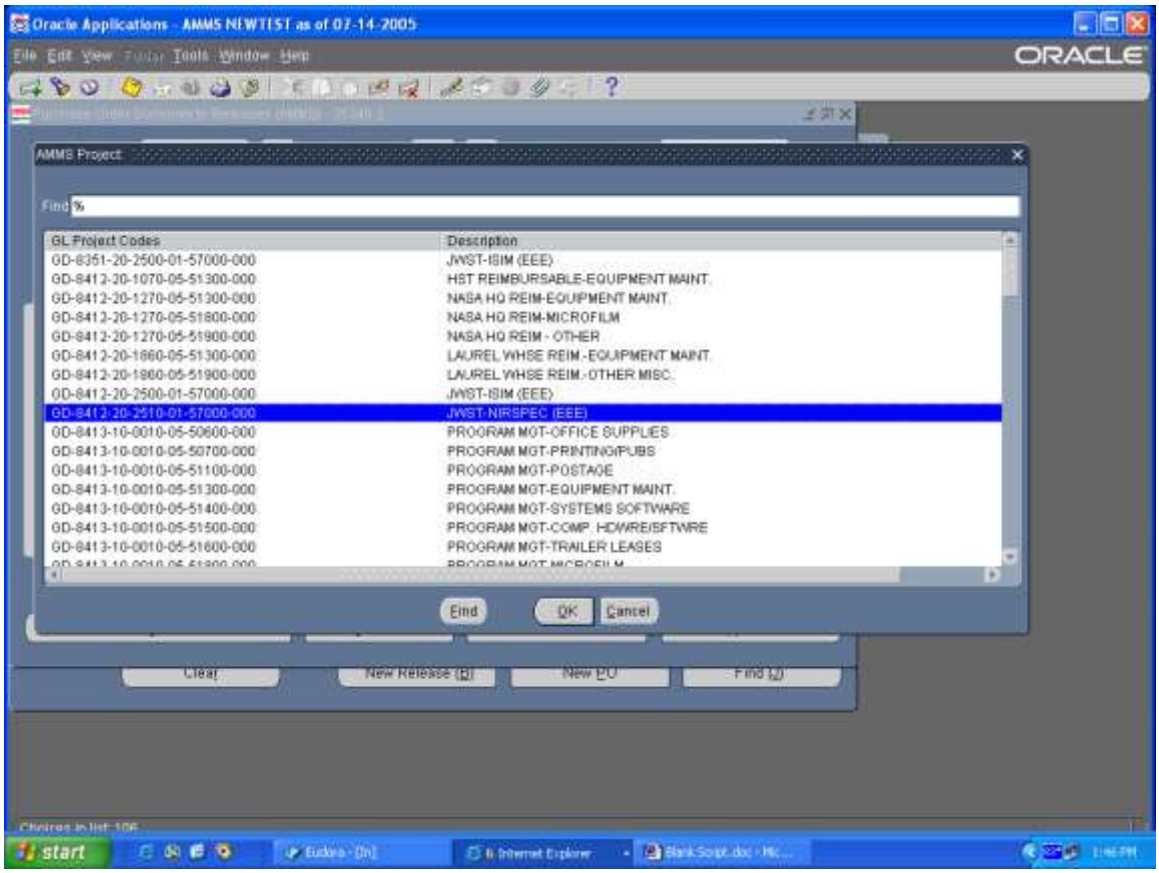
Step Description: Go to the field at the end of the line with the [ ], this is the Descriptive Flex Field, this is where you will put the GL for each individual project. Click in this space

Expected Results: PO Line Locations window will appear



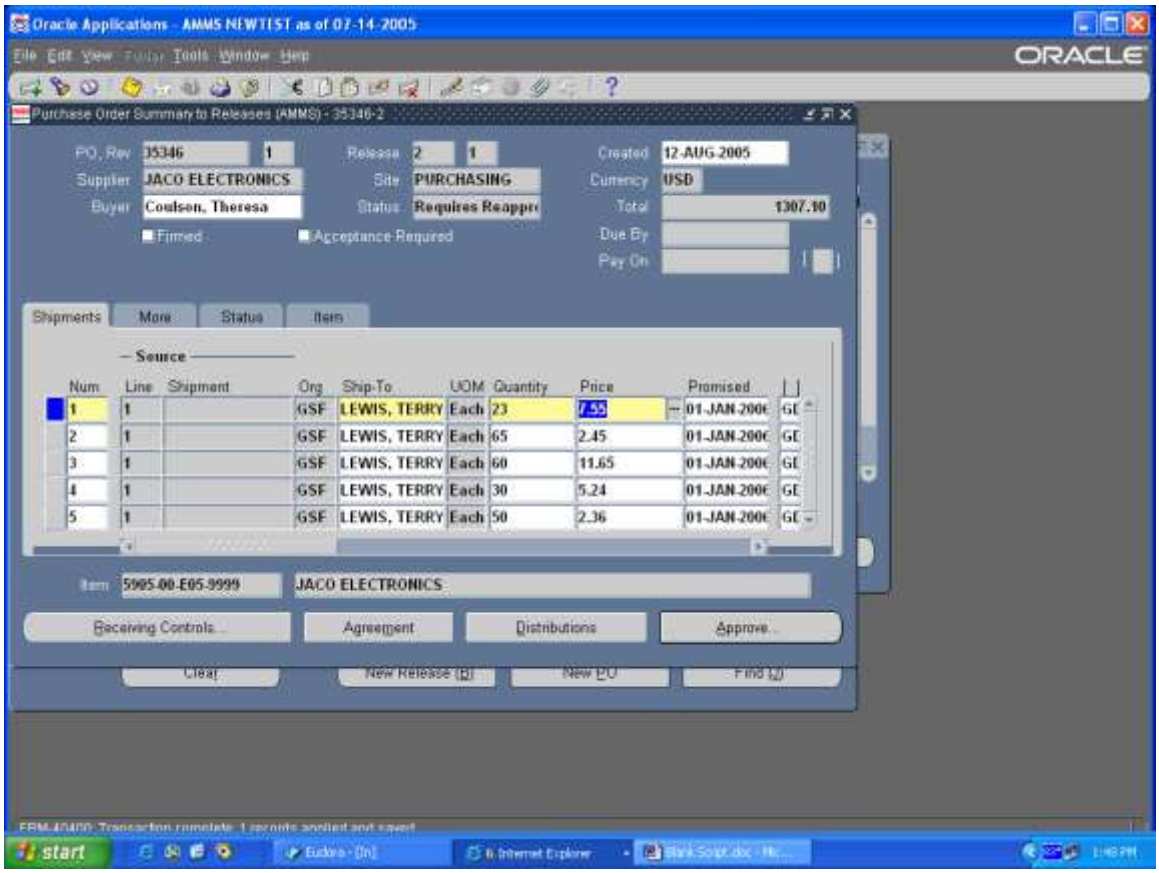
Step Description: At the PO Lines Location window click on the List of Values (LOV) and select the appropriate GL number for the project. You must enter a GL number for each line on the Purchase Release.

Expected Results: Fields will be populated



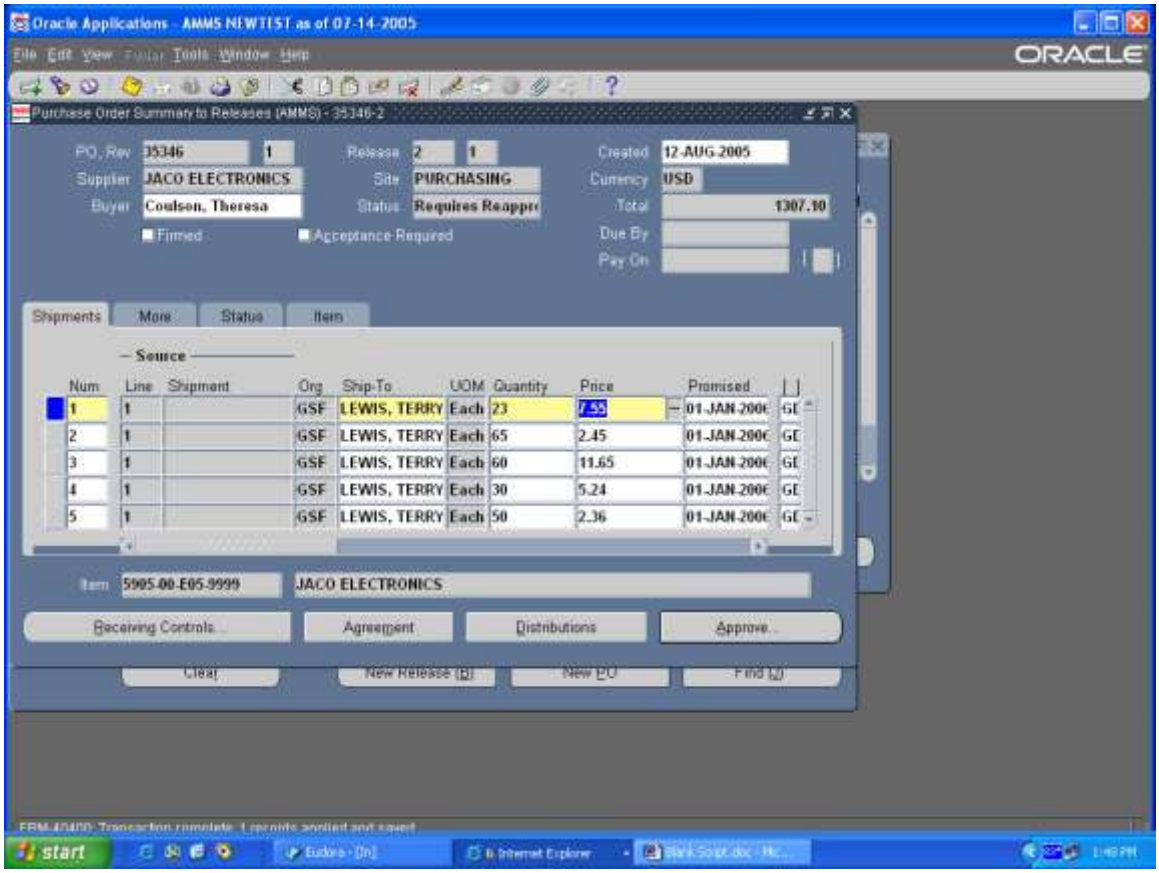
Step Description: Once you have entered all of the GL's for each line Save your work.

Expected Results: Fields will be populated and Transactions Saved message



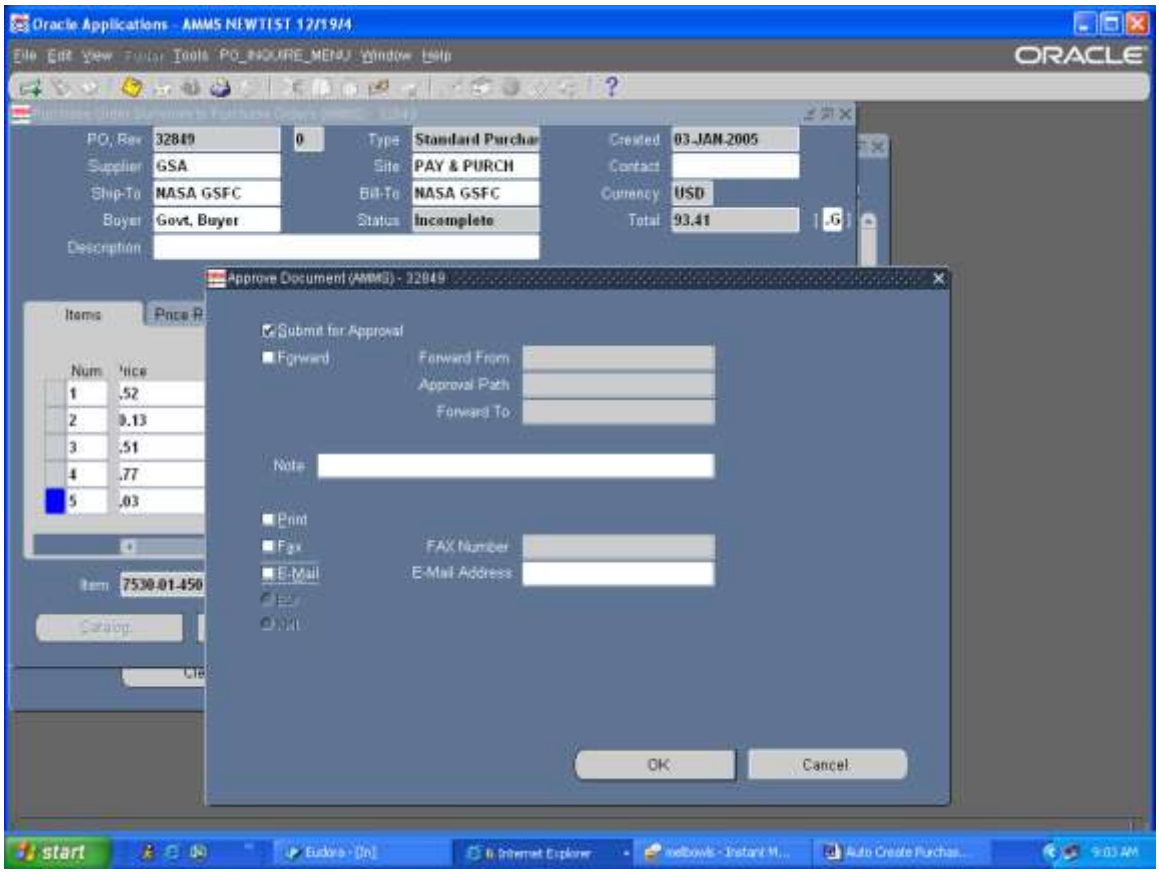
Step Description: Click on the Approve button.

Expected Results: The Approval Documents window will open



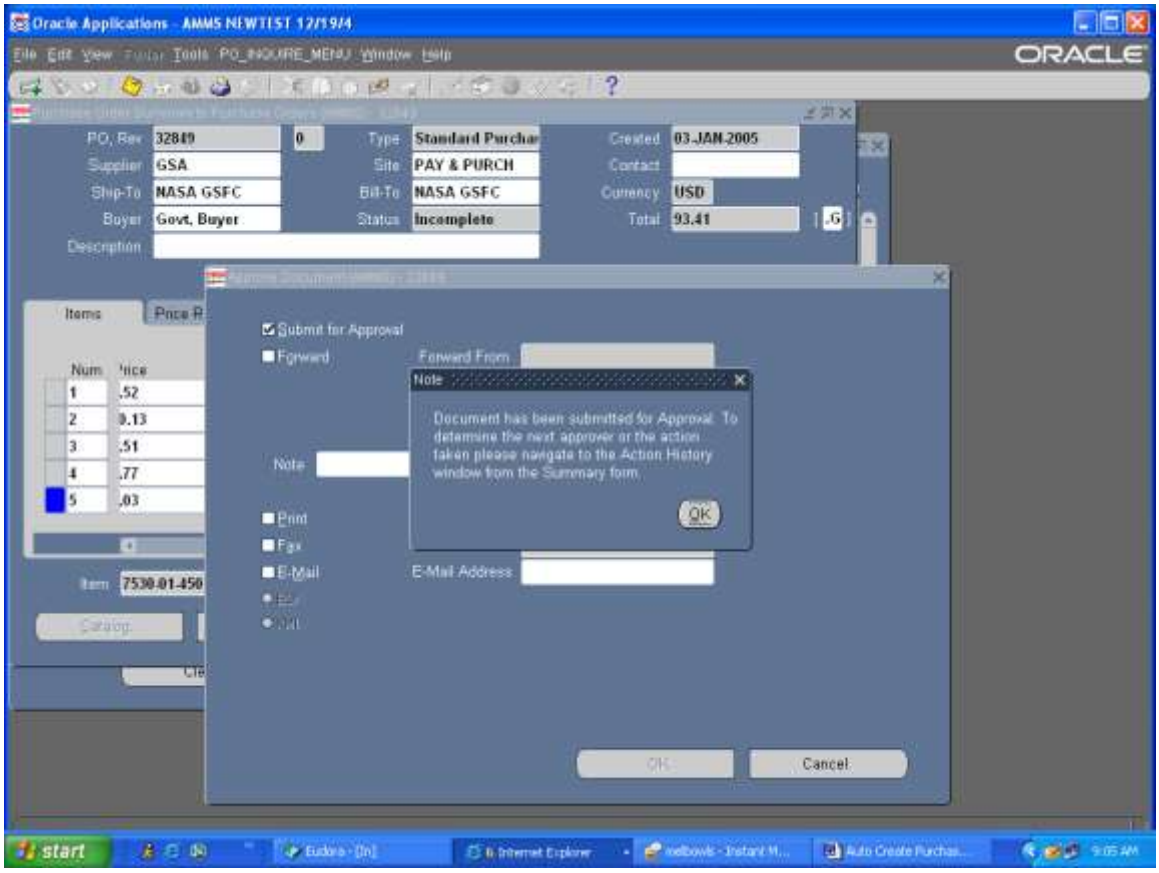
Step Description: Remove the Check Mark from the Email box and click on the OK button.

Expected Results: A Note window will appear

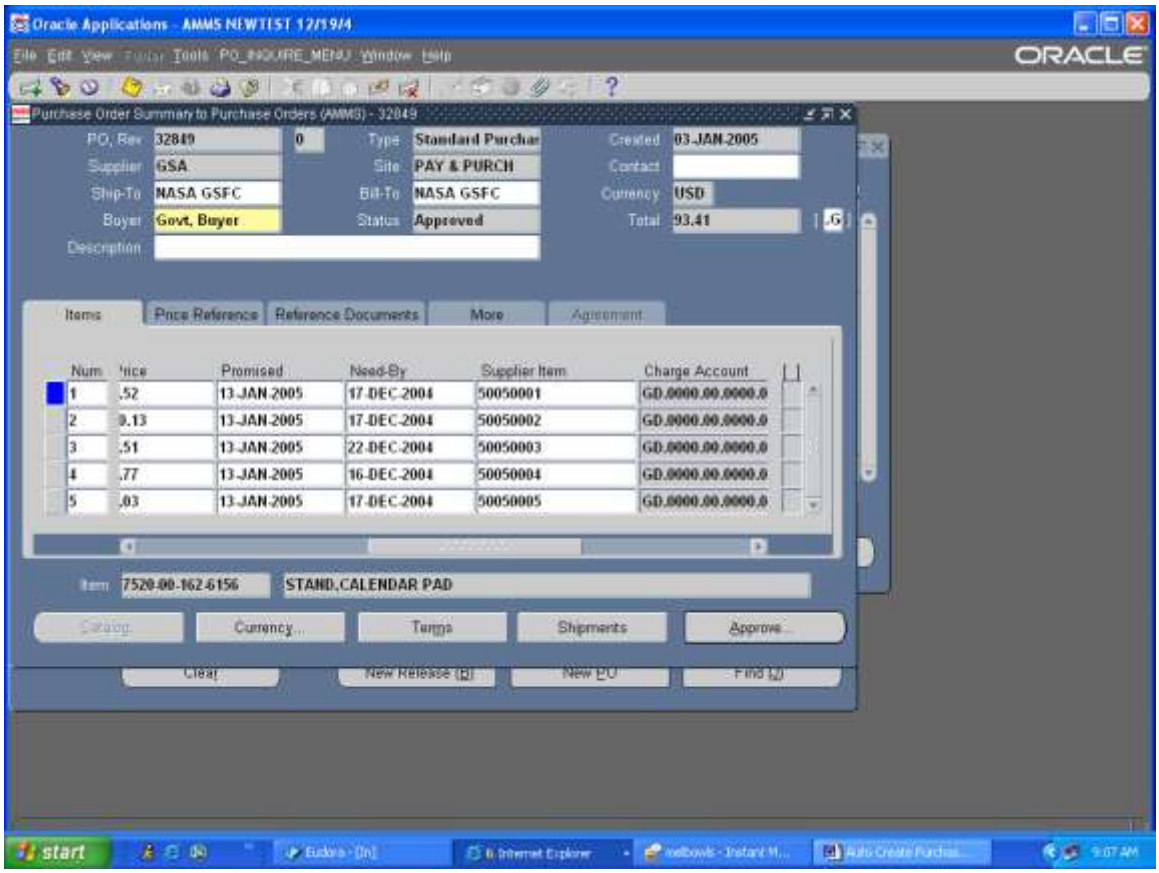


Step Description: The Note window tells you that the “document has been submitted for approval” click OK to the Note window.

Expected Results: You will return to the Purchase Order Summary to Purchase Order window.



Step Description: Take note that the Status on the PO is now Approved.



You are complete. You have created your purchase order.

AMMS TRAINING SCRIPT

Auto Create Project Parts Purchase Orders

Purpose

The purpose of this training script is to show Buyers and Material Coordinators how to auto create purchase order in Oracle.

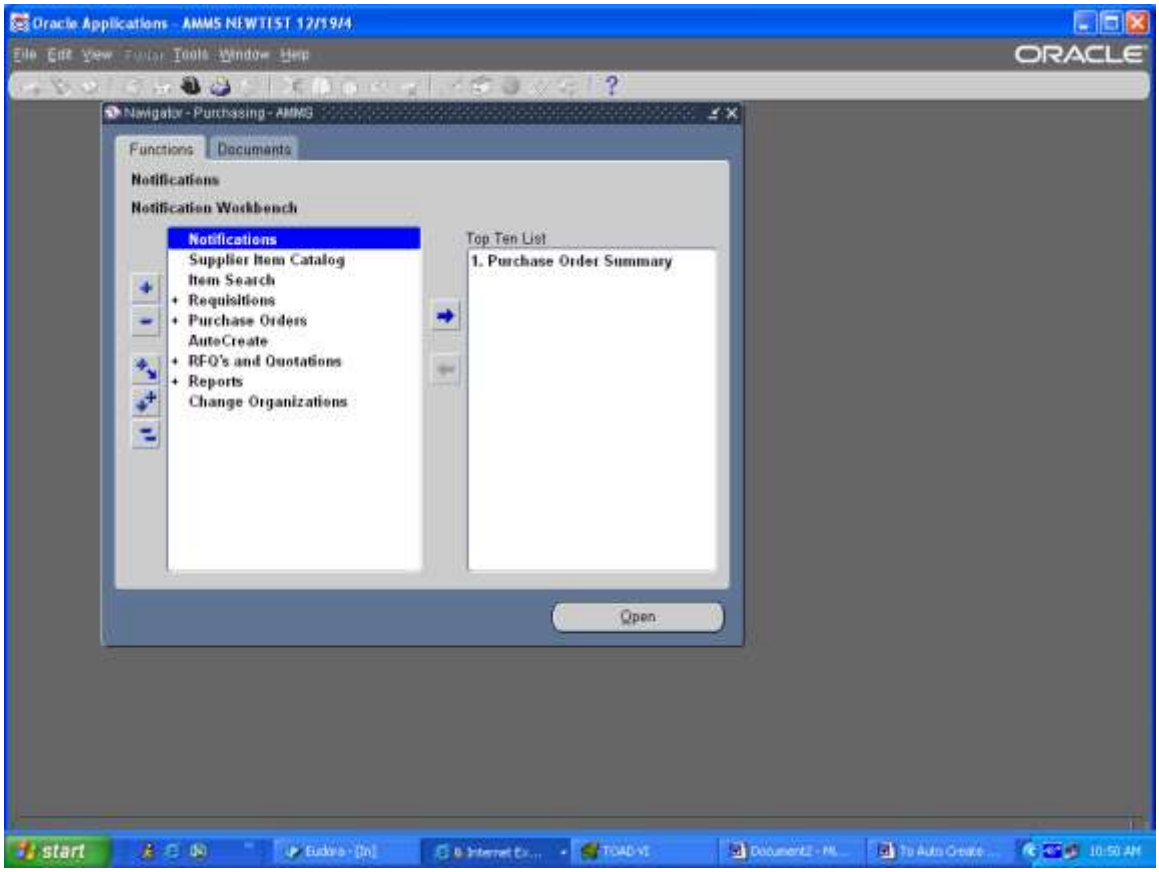
Audience

Buyers and Material Coordinators

Prepared By	Theresa Coulson
Creation Date:	01/03/2004
Document Name	Auto Create Project Parts Purchase Order.doc
Version	4
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Purchasing.	

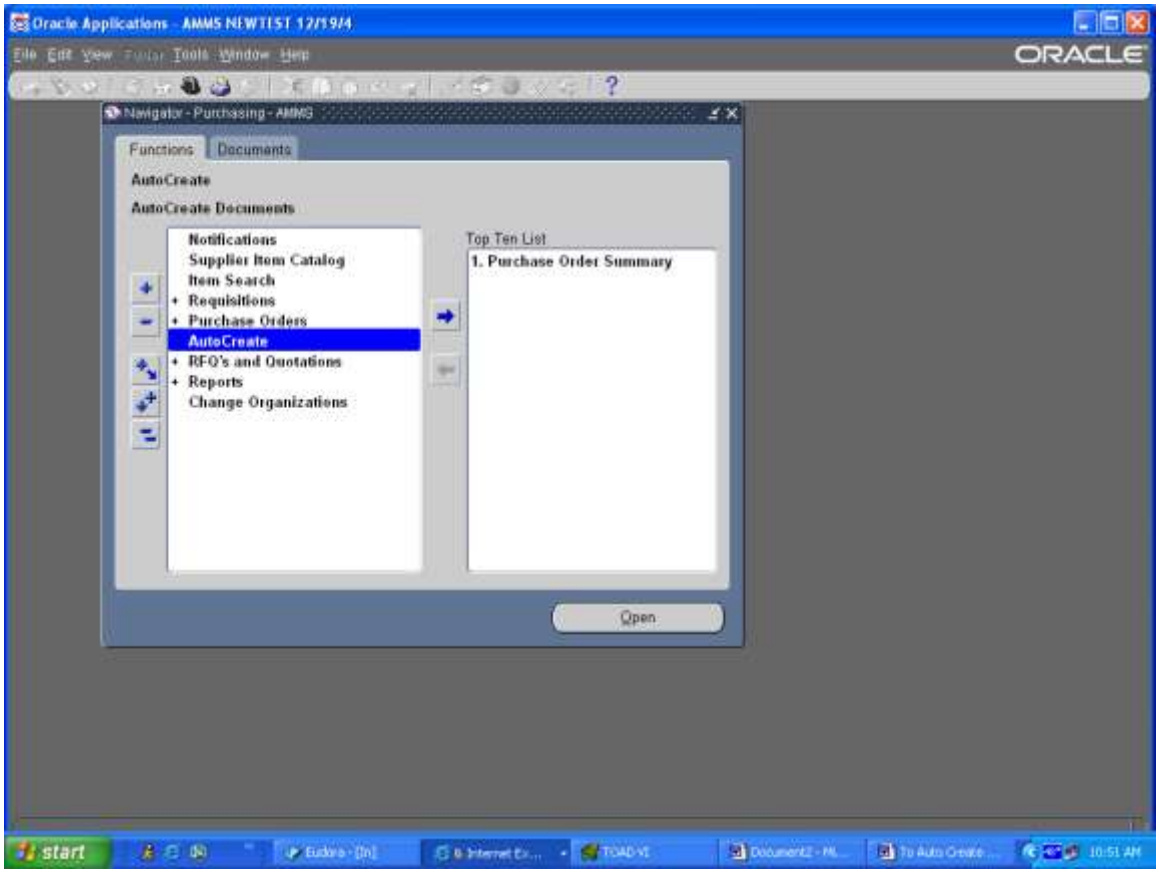
Step Description: Sign onto Oracle and select the Purchasing AMMS responsibility

Expected Results: The Purchasing AMMS main menu will appear



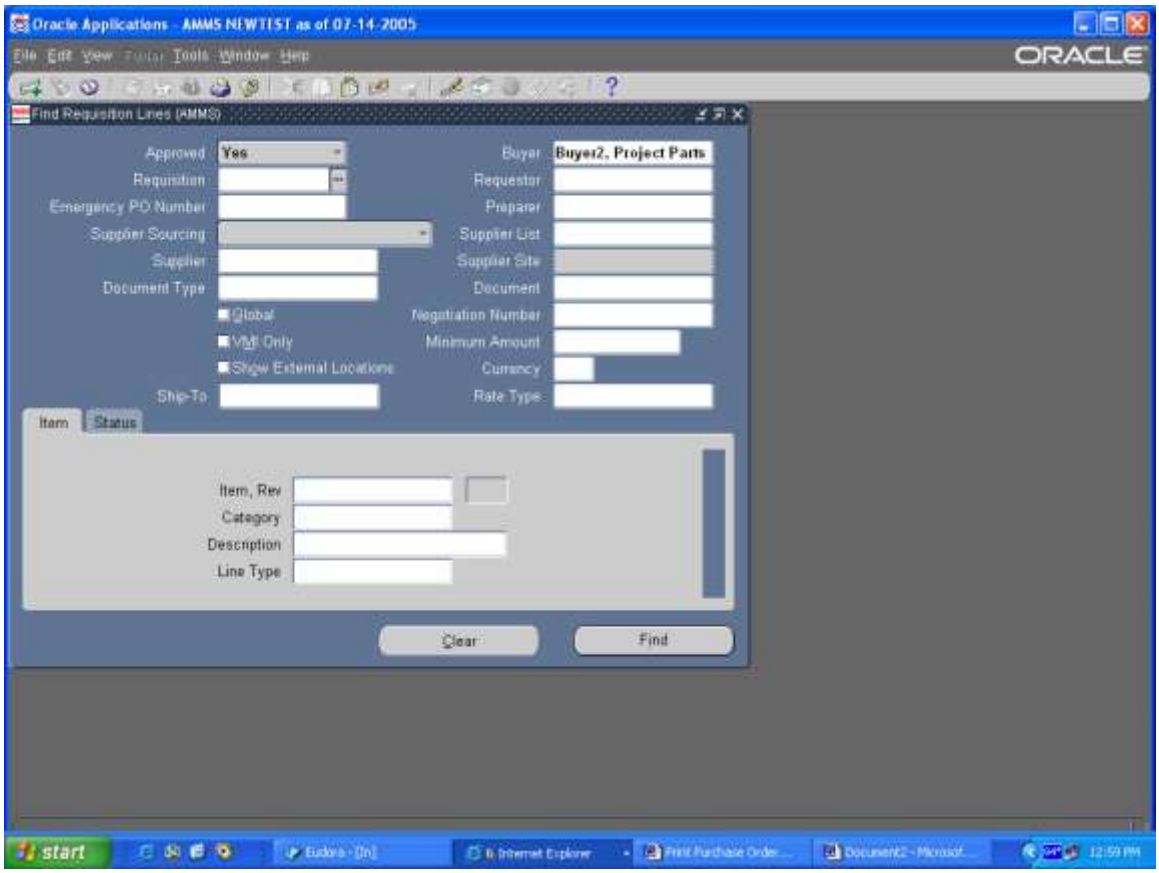
Step Description: Select from the Purchasing AMMS main menu Auto Create and click on the Open button

Expected Results: The Find Requisition Lines window will appear



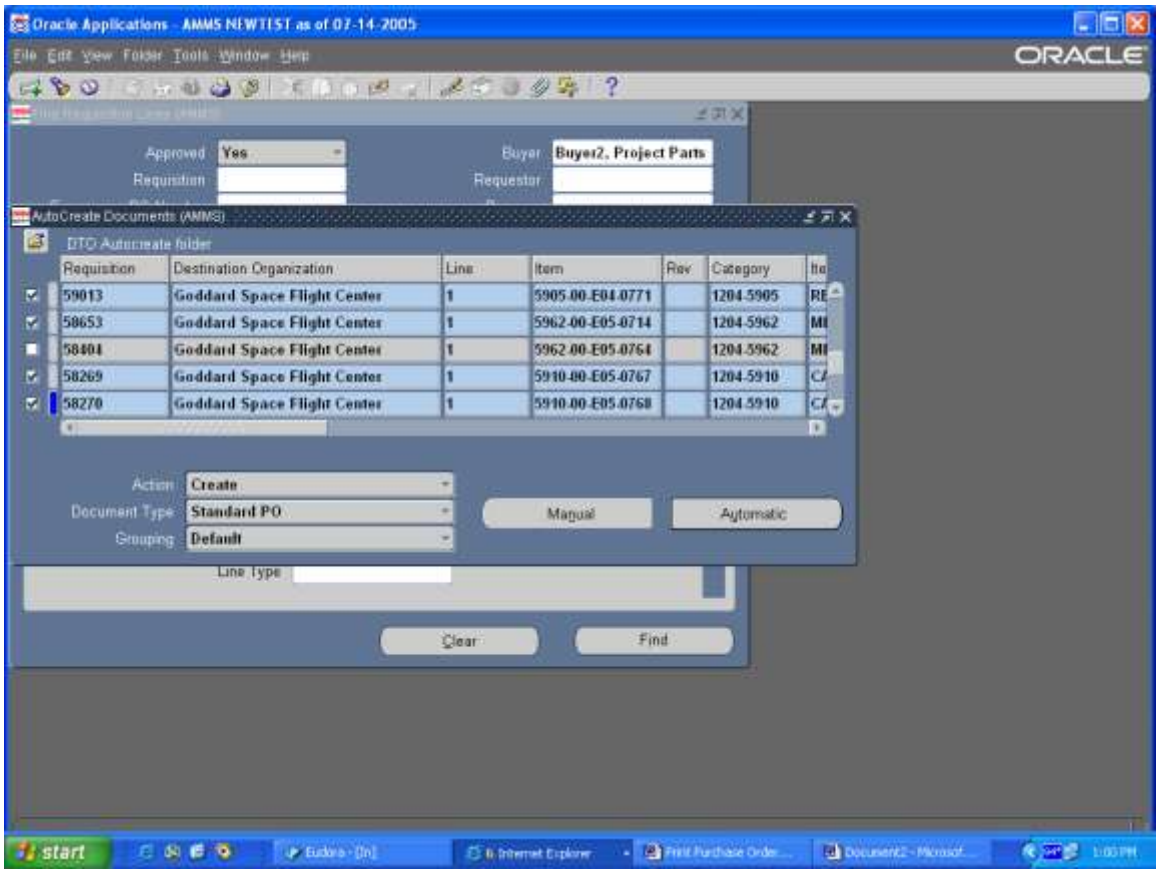
Step Description: Make sure the Approved field is set to Yes. In the Buyer field your buyer name will default, if you need to change, click in the Buyer field, enter the name of the buyer who requisitions you want to access. Click on the Find Button

Expected Results: The Auto Create Documents window will open



Step Description: Select the requisitions you want to put onto a Purchase Order by placing a check mark in the box to the left, the line will turn blue, you can select multiple lines

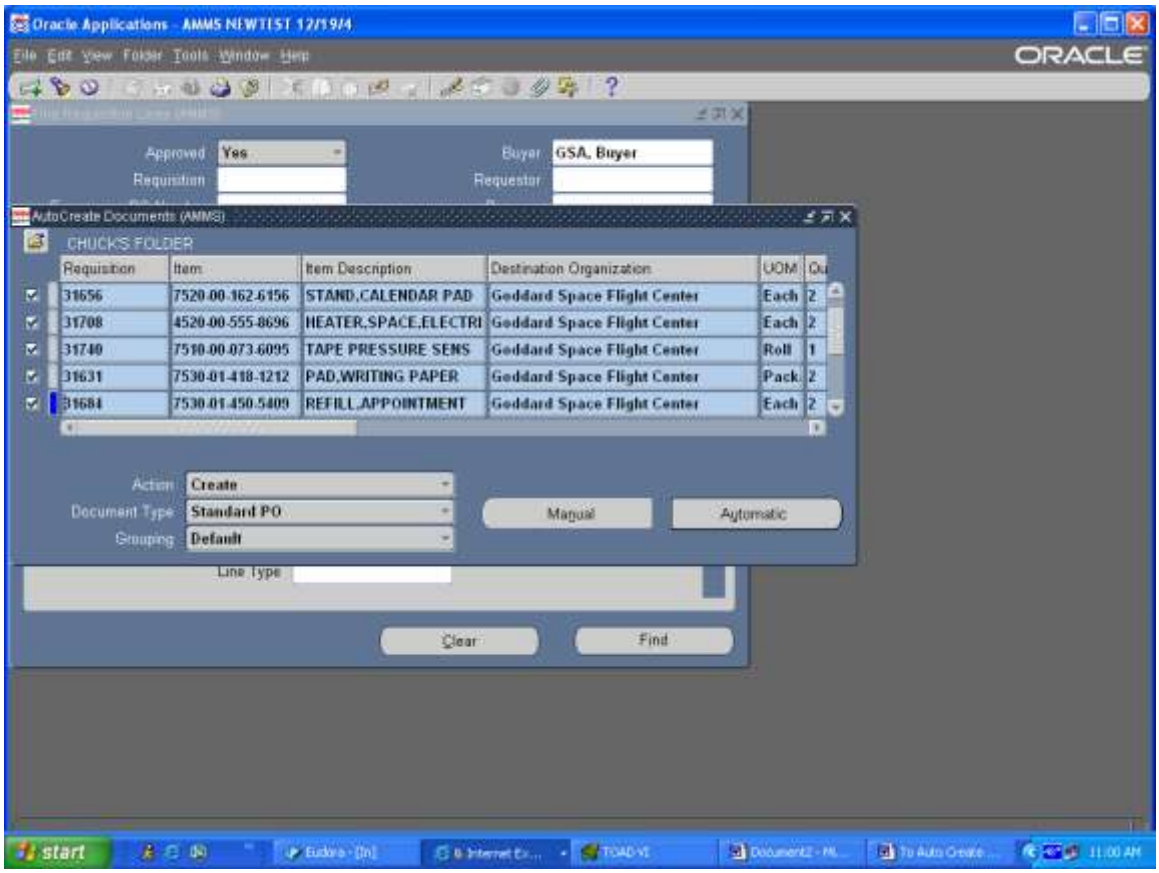
Expected Results: All lines selected will be blue



Note: This screen will give you detailed information, requisition number, item number, quantity, and the Destination Organization. Goddard and Wallops requisitions are not (normally) to be placed on the same purchase orders. So please take not of the Destination Organization when creating your purchase orders.

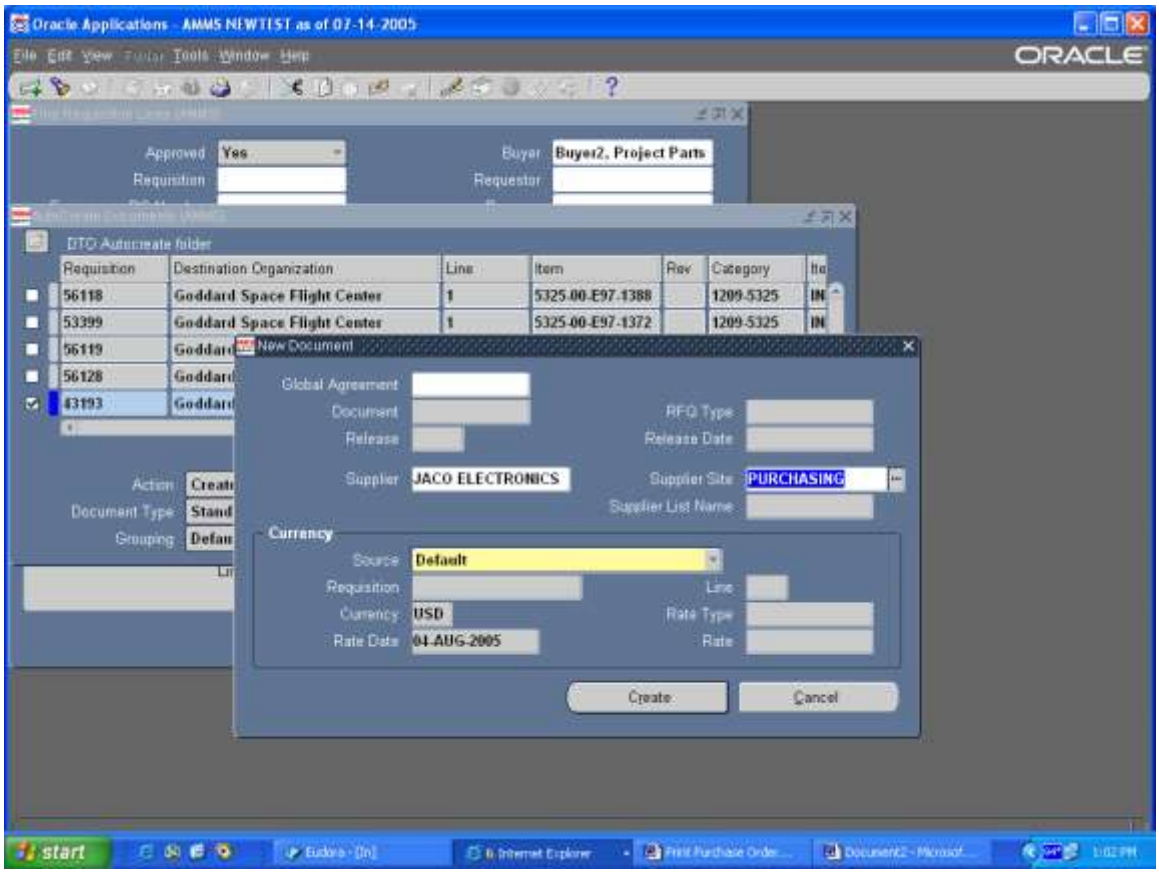
Step Description: At the bottom of the Auto Create Documents window, make sure that the Action is set to Create, the Document Type is set to Standard PO and the Grouping is Default. Click on the Automatic button.

Expected Results: The New Documents window will appear



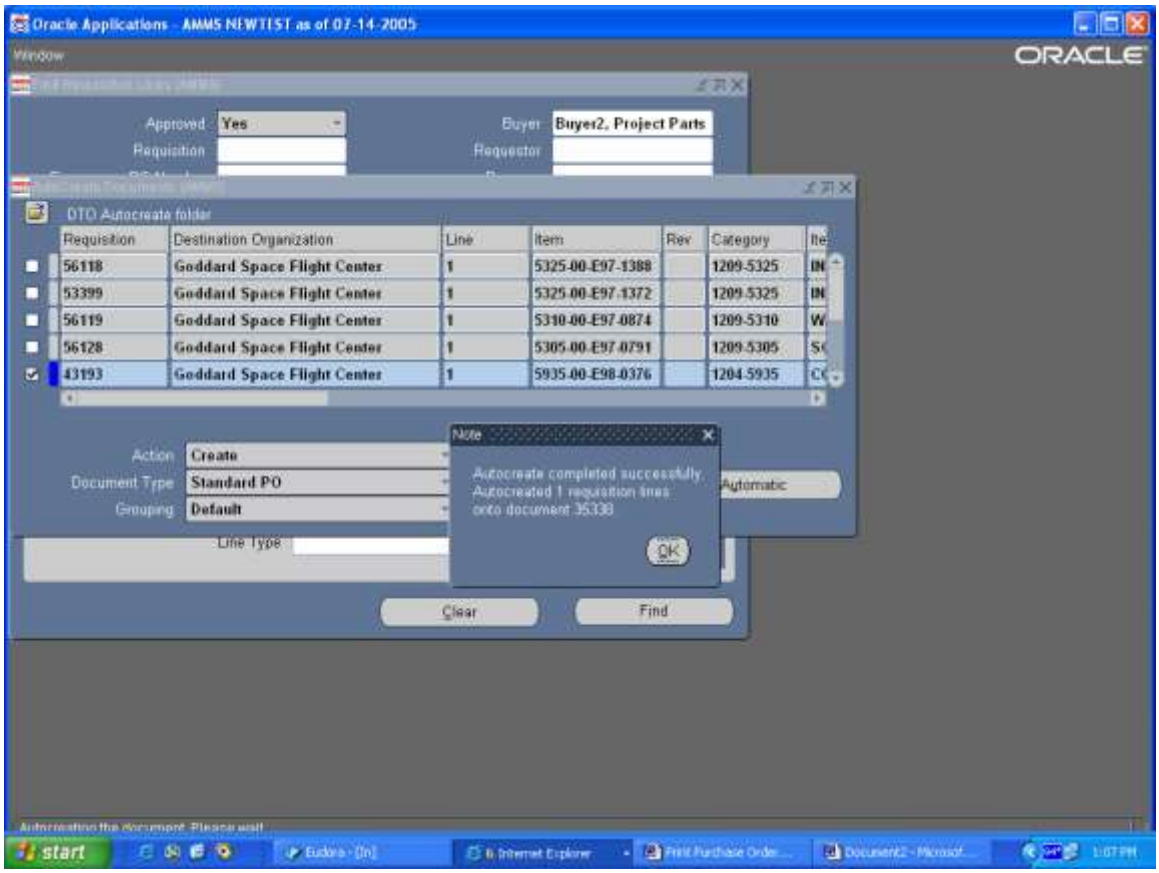
Step Description: At the New Documents window in the Supplier field click on the LOV and select the correct Supplier that the material is being bought from. Once you have populated the Supplier field click on the Create Button.

Expected Results: A Note window will appear.



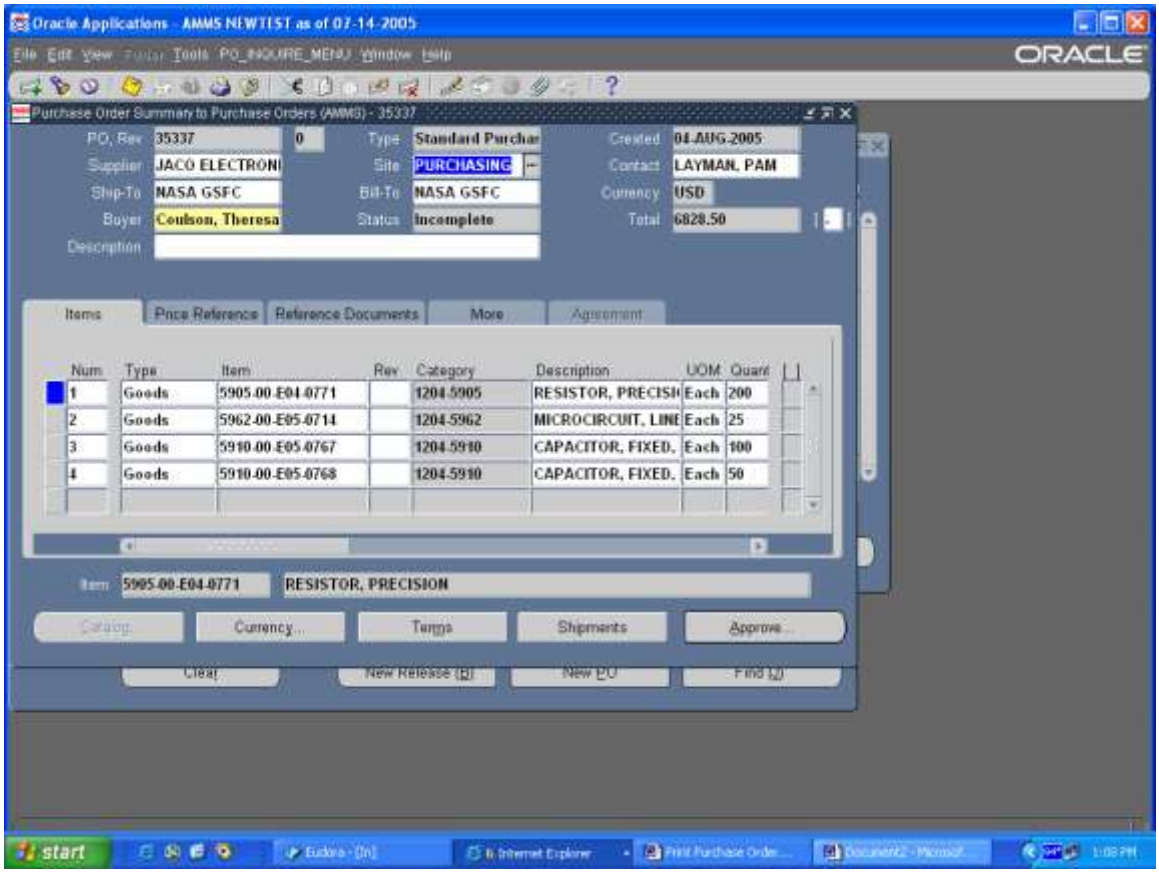
Step Description: At the Note window you will see your Oracle Purchase Order number and how many requisitions are on the purchase order. Please take note of this information. Click OK to the Note window.

Expected Results: The Auto Create to Purchase Order window will appear.



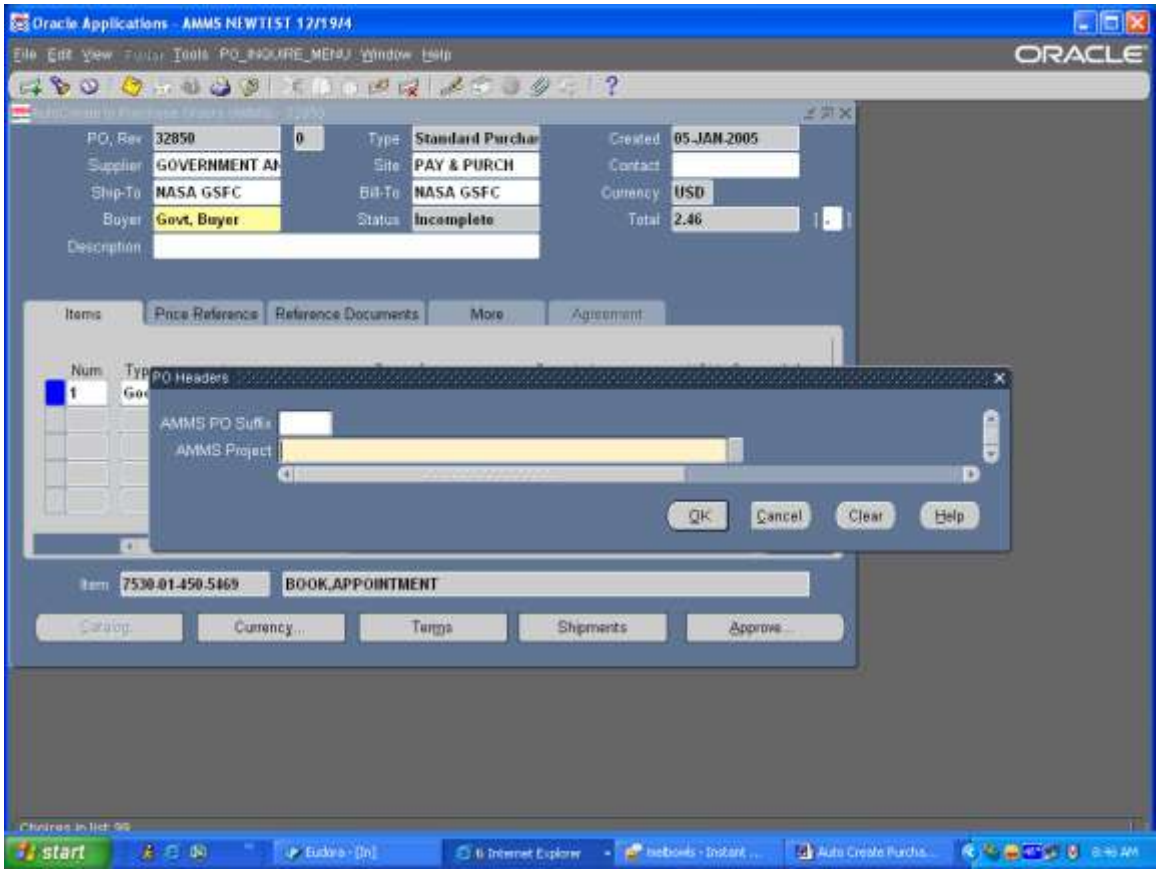
Step Description: Click in the Descriptive Flex Field, the field with the [ ] around them. This is where you will assign the GL number.

Expected Results: PO Header window will open.



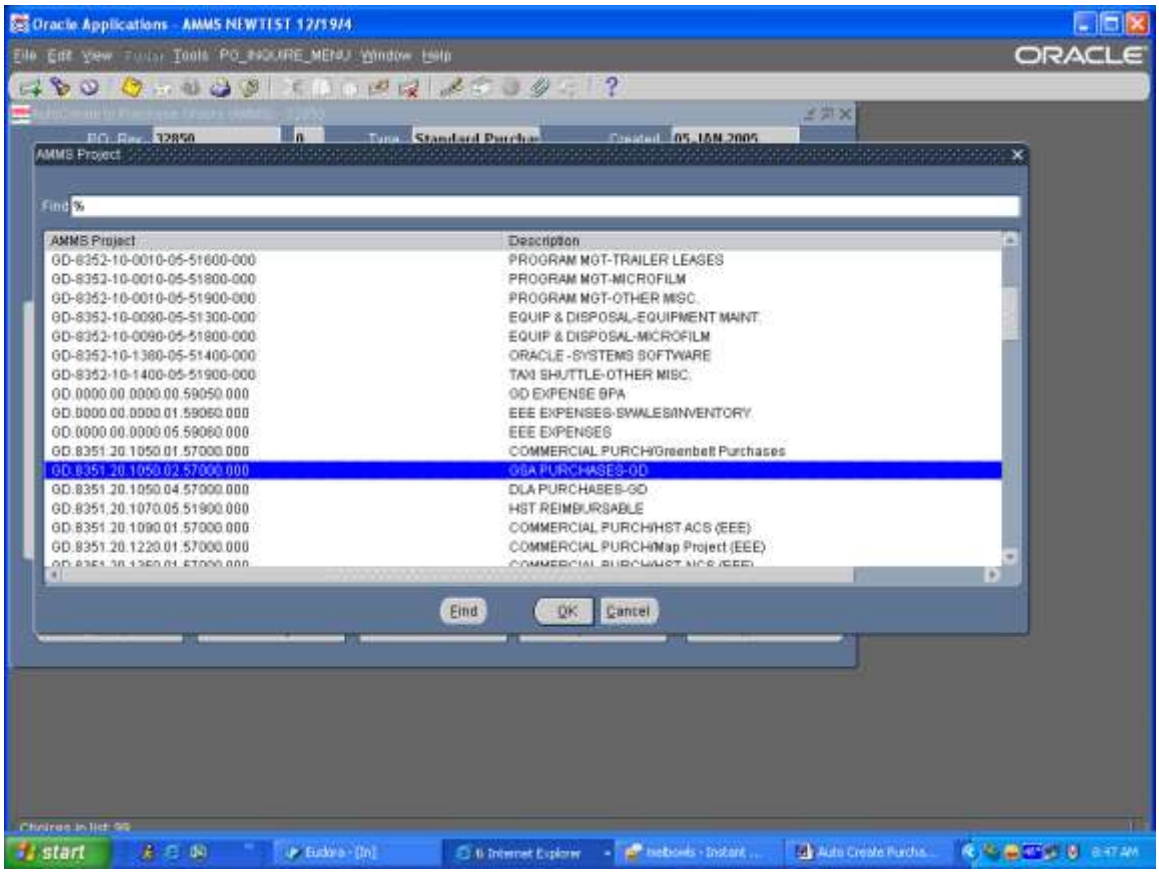
Step Description: At the PO header window enter the Suffix for this PO Examples: EEE. Click in the AMMS Project field and click on the LOV.

Expected Results: AMMS Project window will appear with a list of GL numbers.



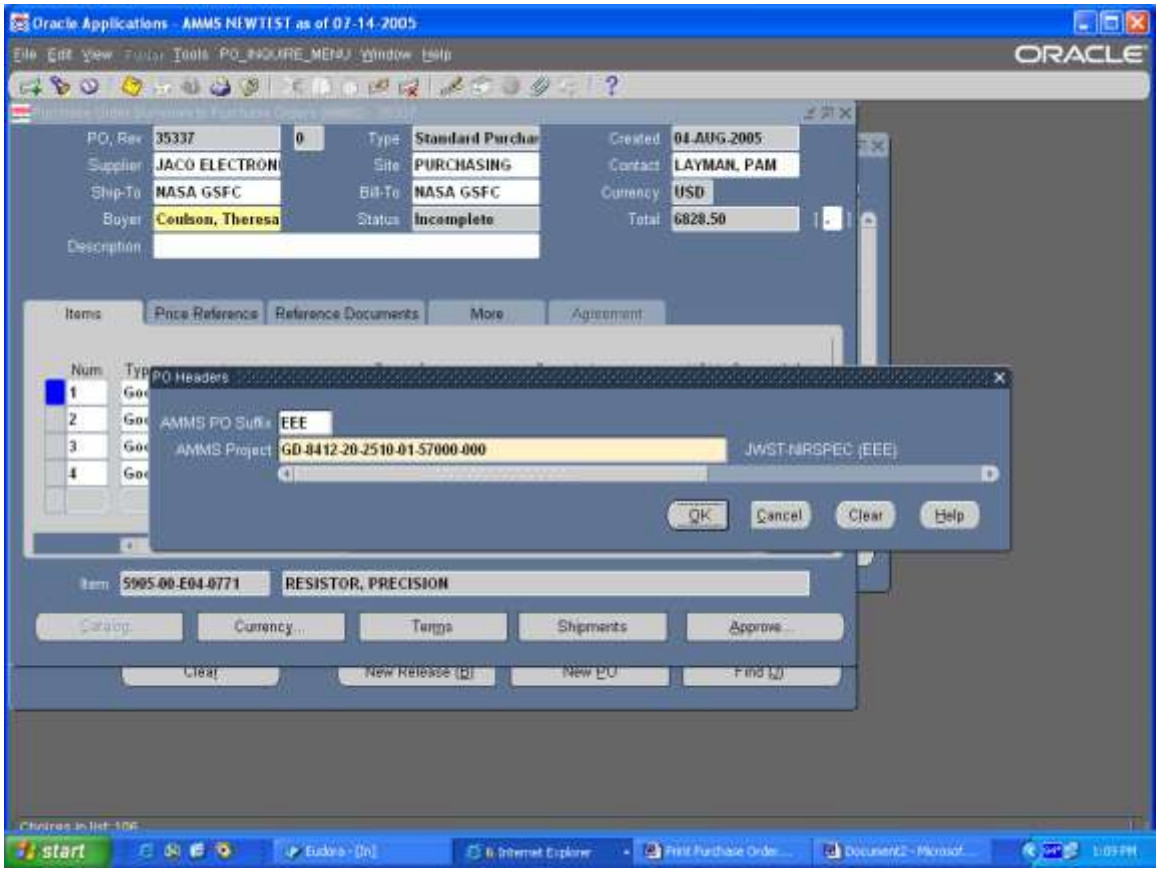
Step Description: Select the appropriate GL number from the list provided. Click on the OK button.

Expected Results: You will return to the PO Header window and the AMMS Project field will be populated with a GL number.



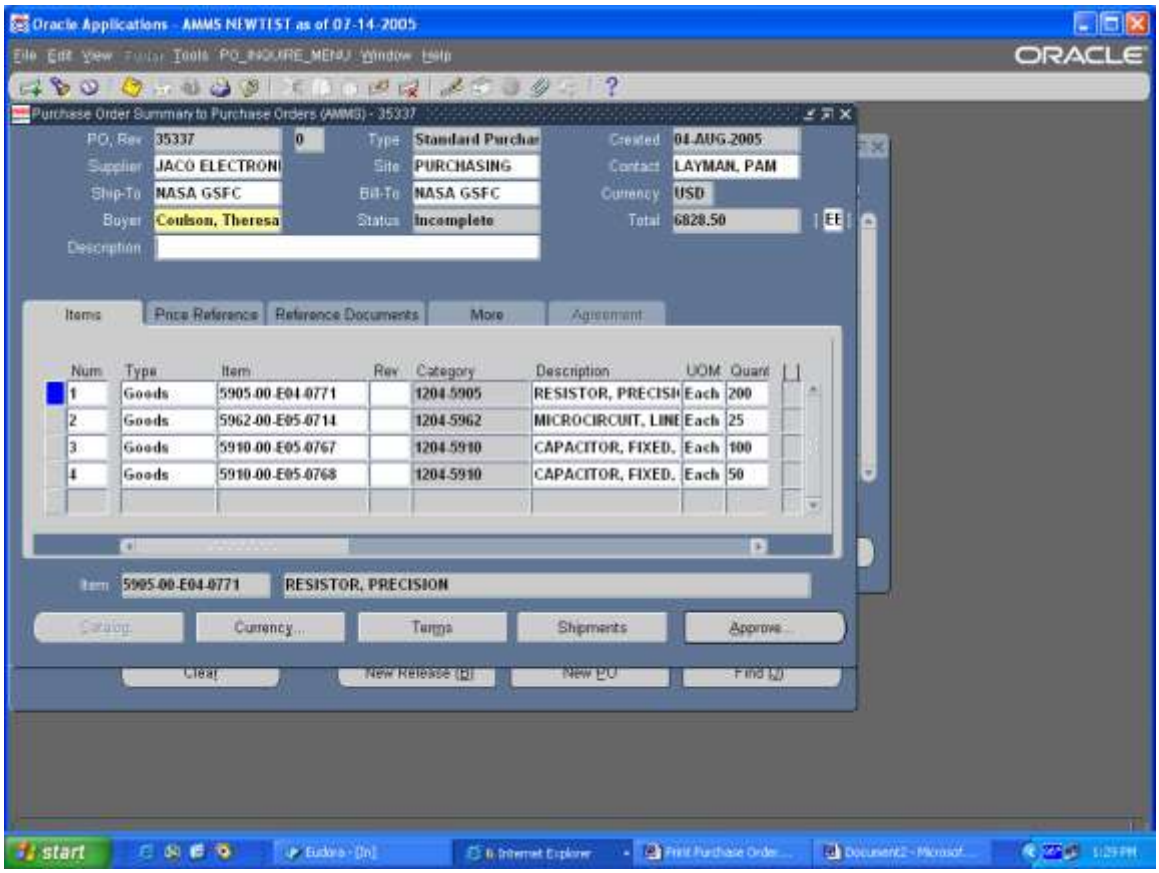
Step Description: Click OK to the PO Header window.

Expected Results: You will return to the Auto Create to Purchase Order window



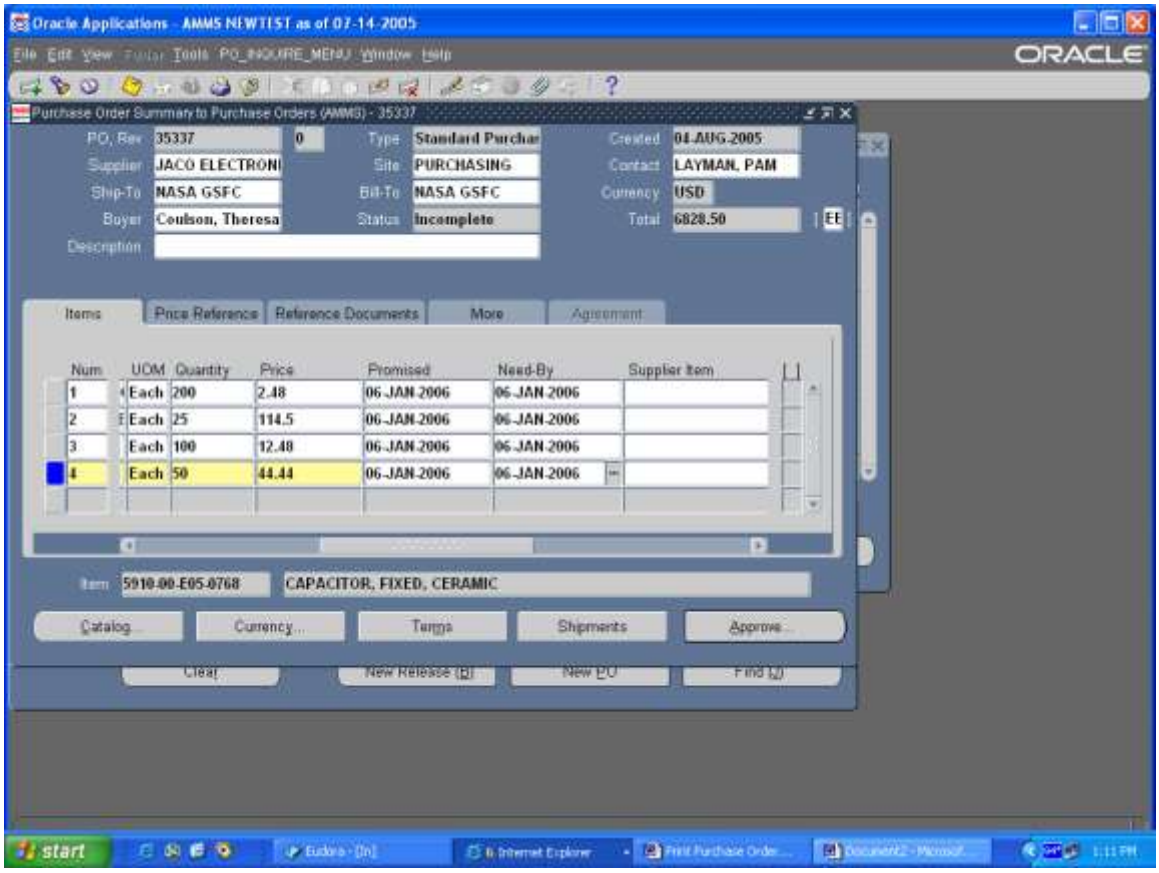
Step Description: At this time assign any Attachments to the header as necessary. Do this by clicking to the paper clip on the tool bar, and following the create attachments script.

Expected Results: Attachment will be on Purchase Order



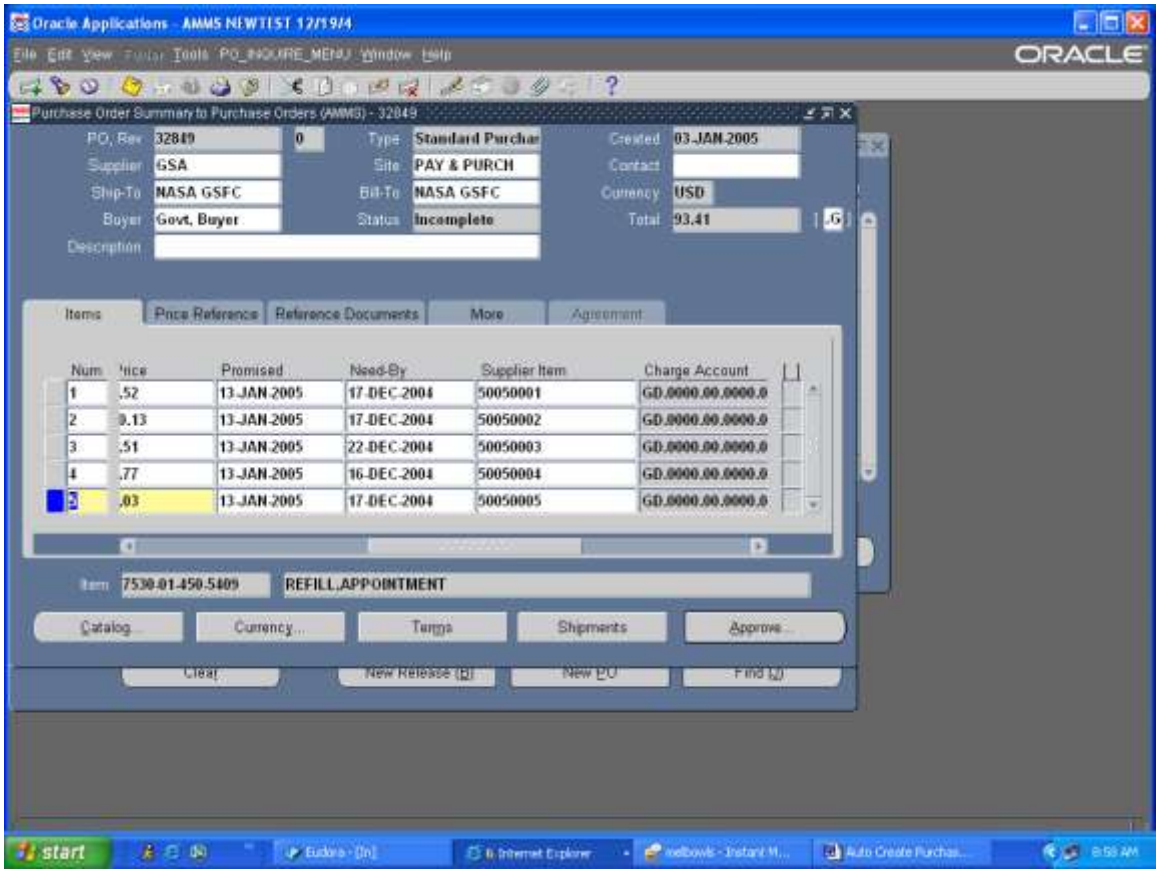
Step Description: Go to the bottom of the screen to the Line Items on the Purchase Order. Use the scroll bar to move to the Price field update this cost if necessary. At the Promised field click on the LOV and select the Promised date. At The Need-By date field enter the Estimated Delivery Date. Do this for each line on the purchase order.

Expected Results: Fields will be populated



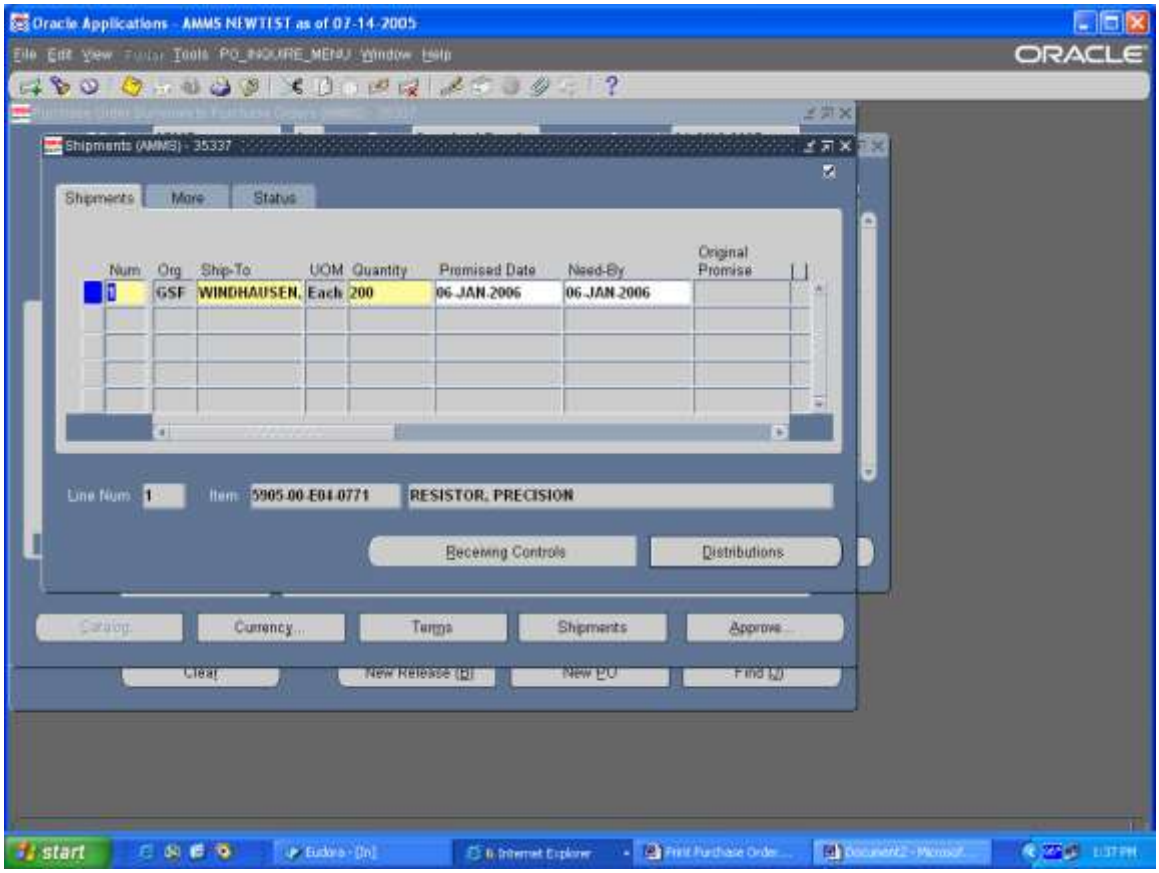
Step Description: Scroll over to the Supplier Item field. This is where you will enter a Part Number for the item. Do this for each line on the purchase order.

Expected Results: Field will be populated



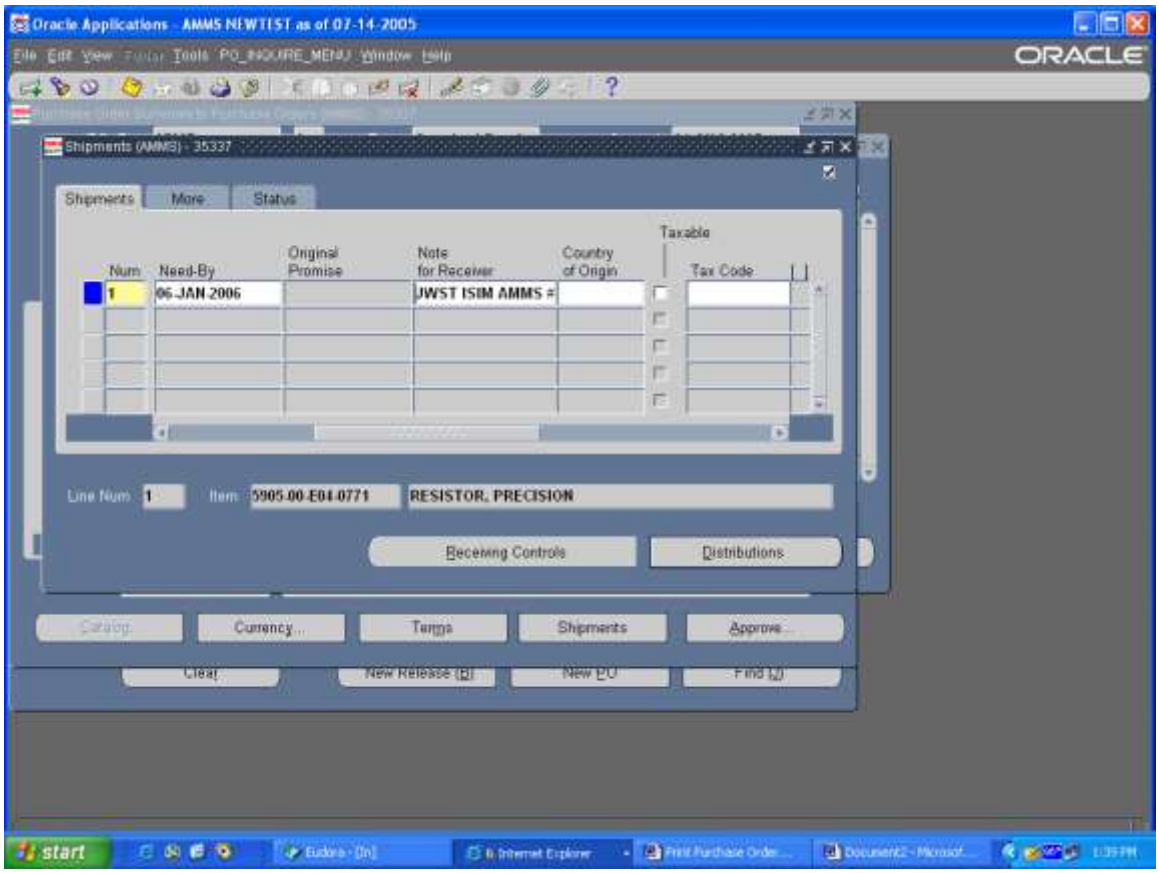
Step Description: For each line click on the Shipments button at the bottom of the screen.

Expected Results: Shipments window will appear



Step Description: Use the scroll bar and move to the right until you see the Note to Receiver field. Enter any special notes required information into this field. Do this for each line on the purchase order.

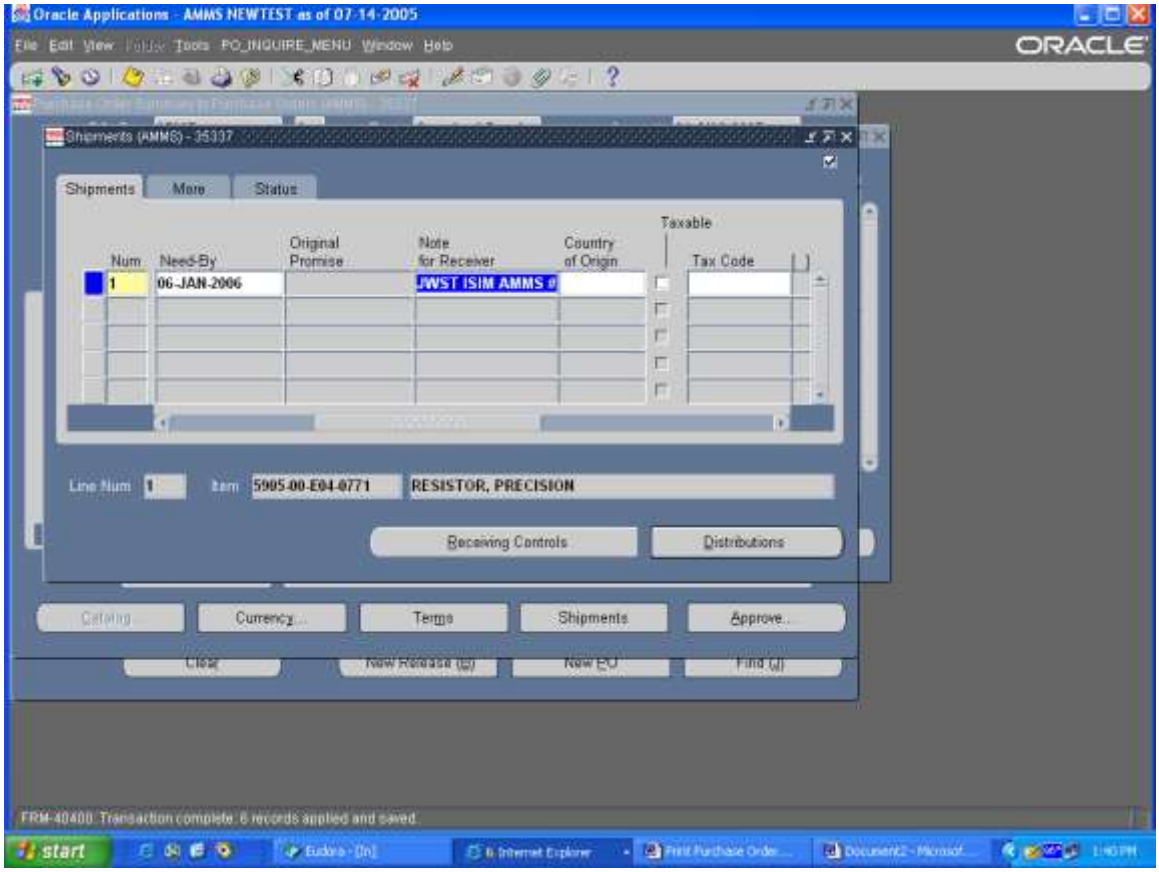
Expected Results: Field will be populated



NOTE: Repeat this step for each line on the purchase order

Step Description: Save you work at the Shipments Window

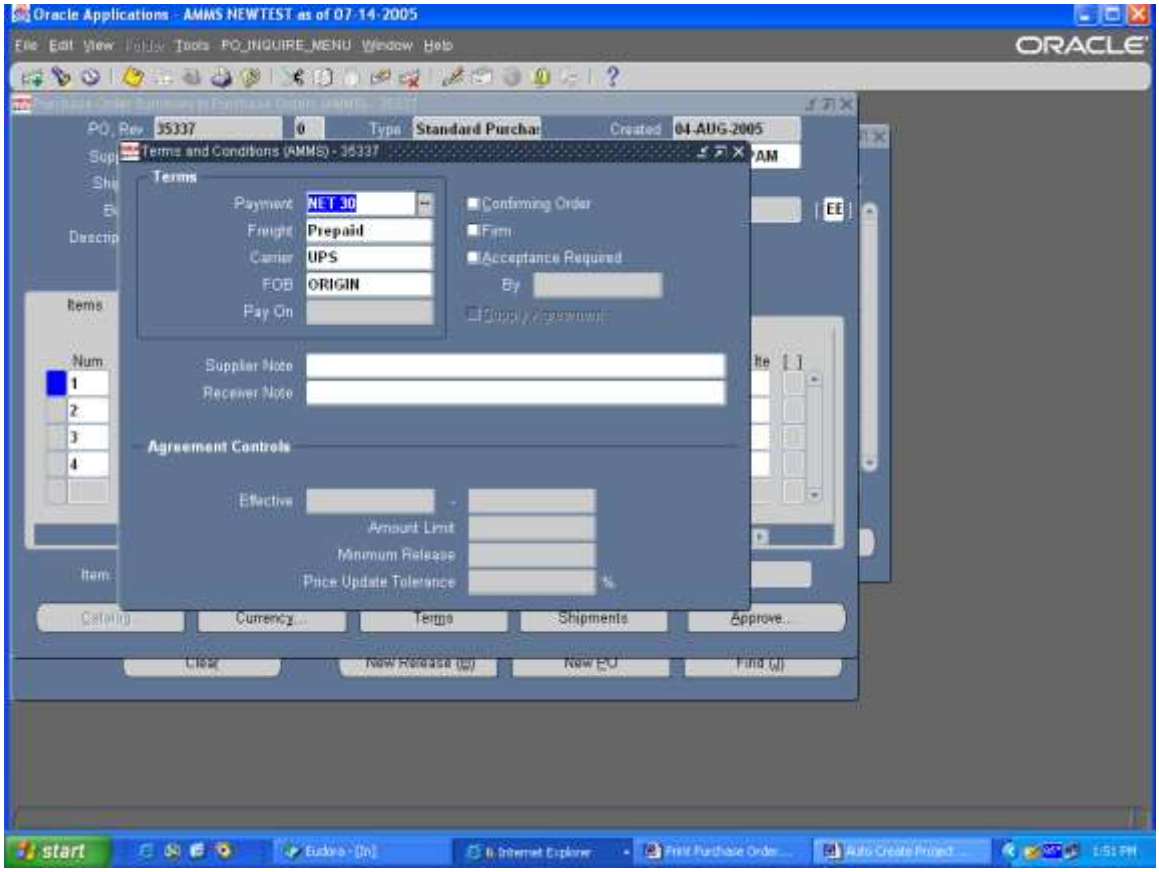
Expected Results: Transactions Saved and Applied Message



NOTE: Repeat this step for each line on the purchase order.

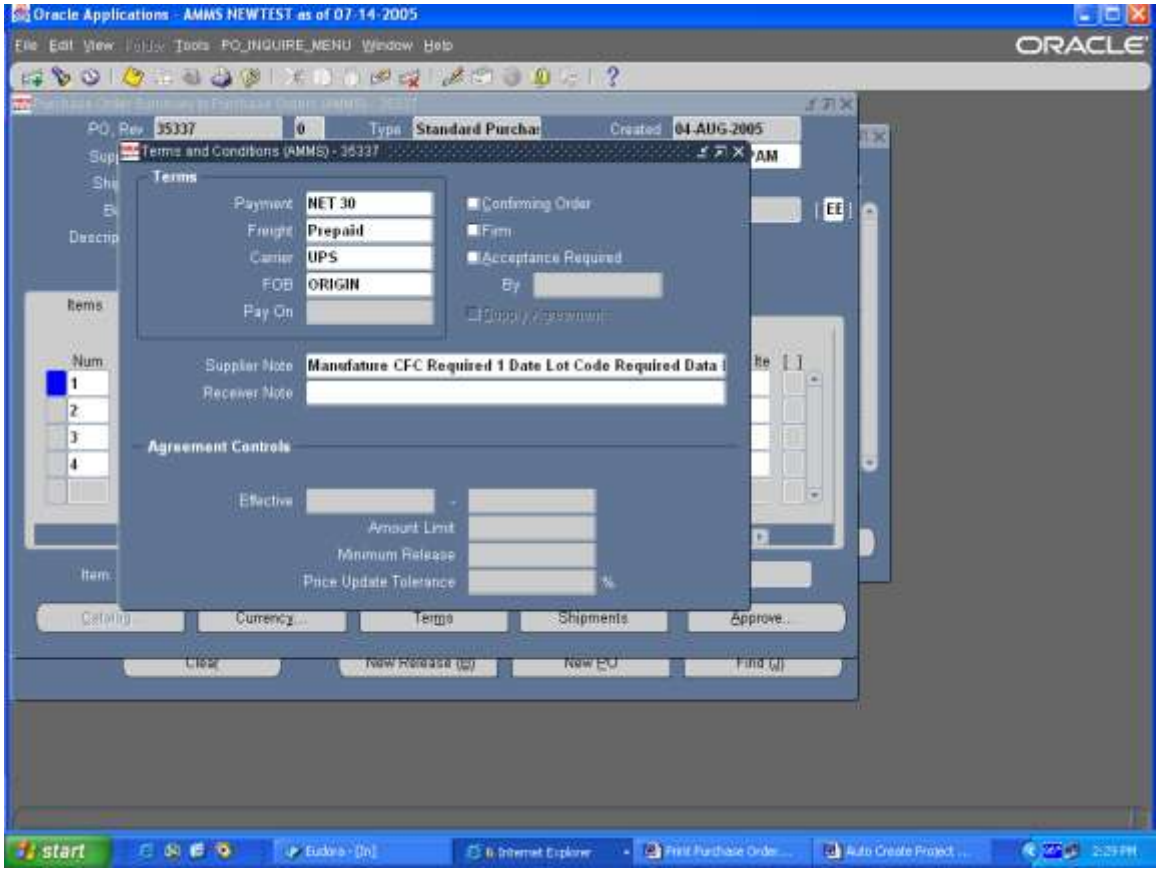
Step Description: At the bottom of the screen click on the Terms button.

Expected Results: Terms and Condition window will appear



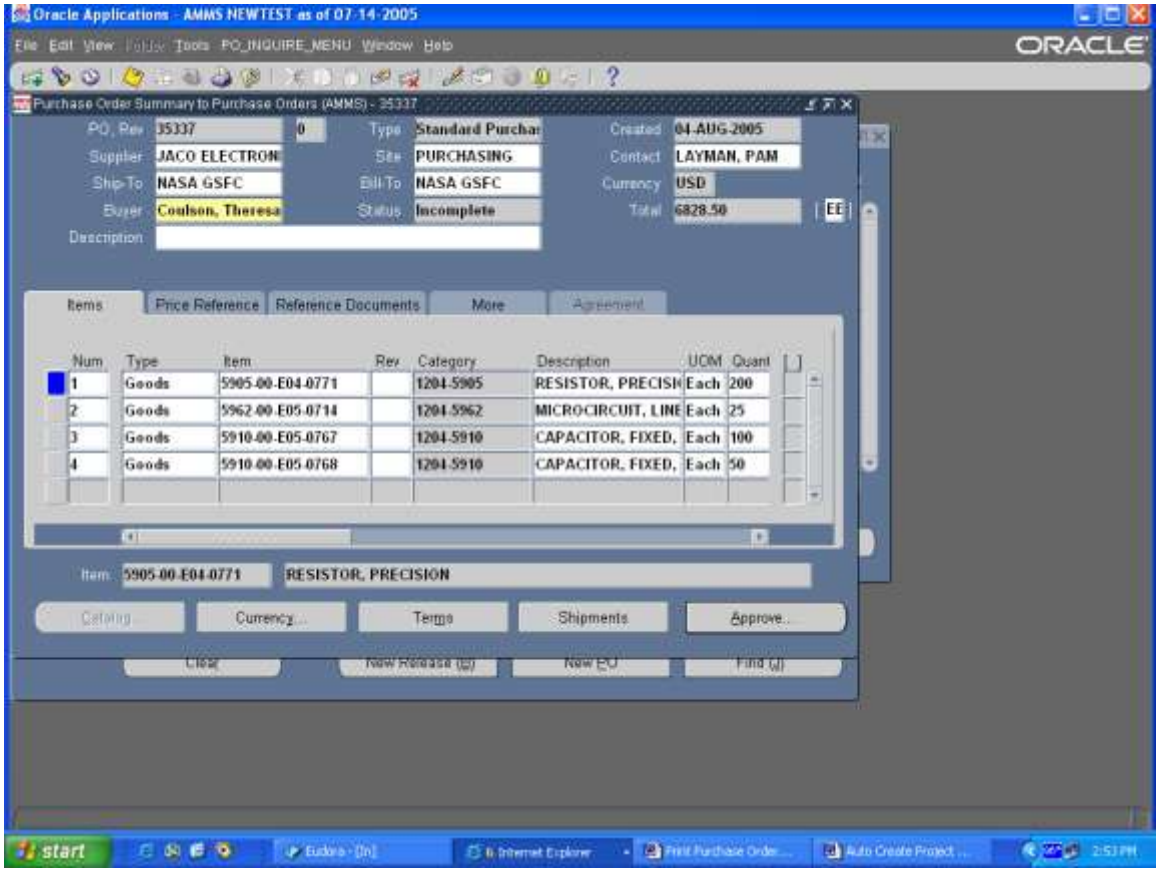
Step Description: In the Supplier Note field enter any information that the Supplier needs

Expected Results: Field will be populated



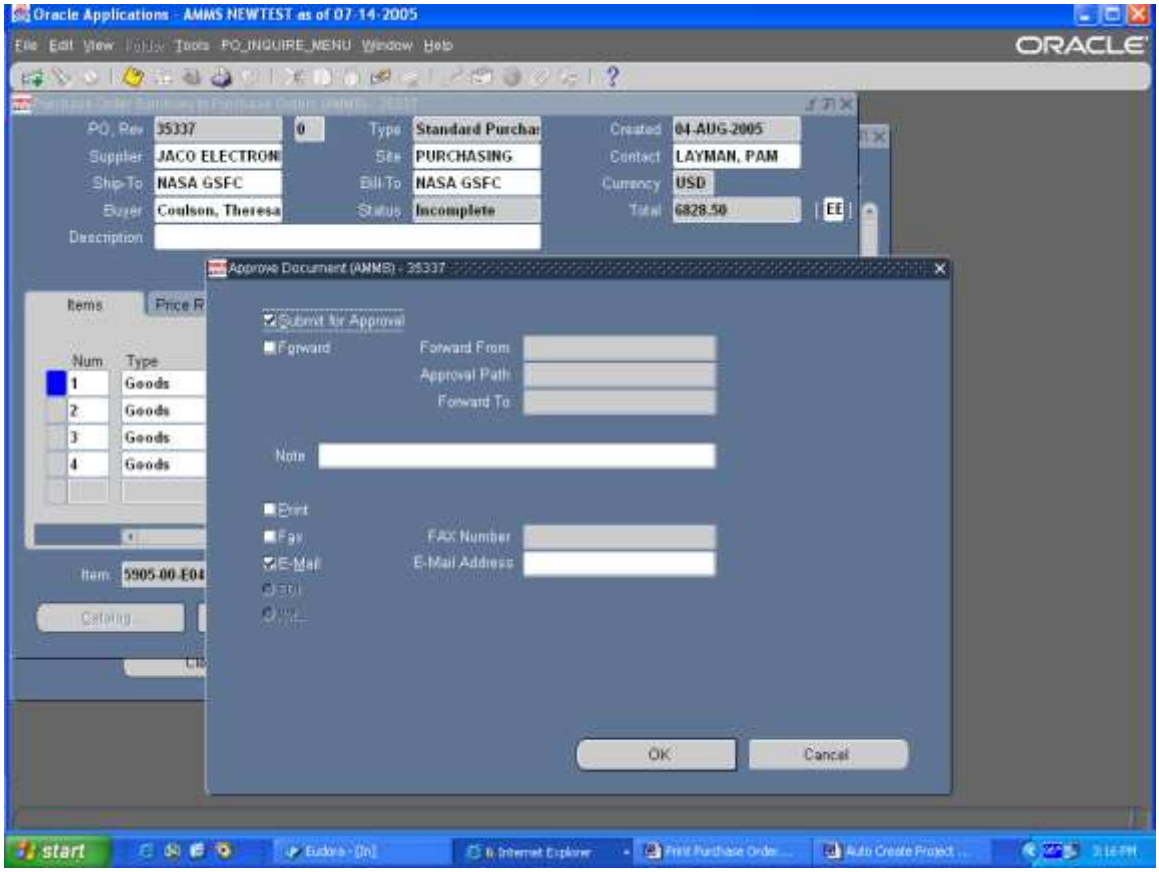
Step Description: Save your work

Expected Results: Transactions Saved and Applied



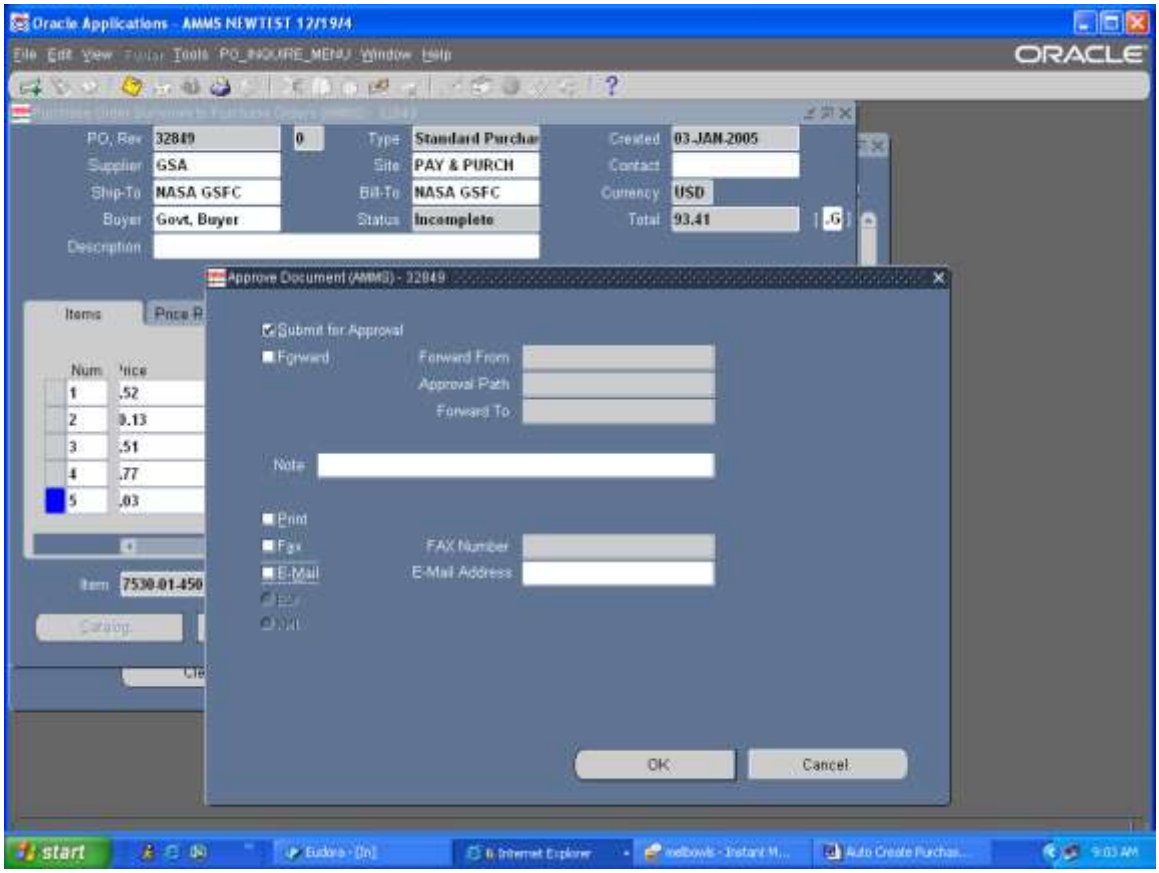
Step Description: Click on the Approve button.

Expected Results: The Approval Documents window will open



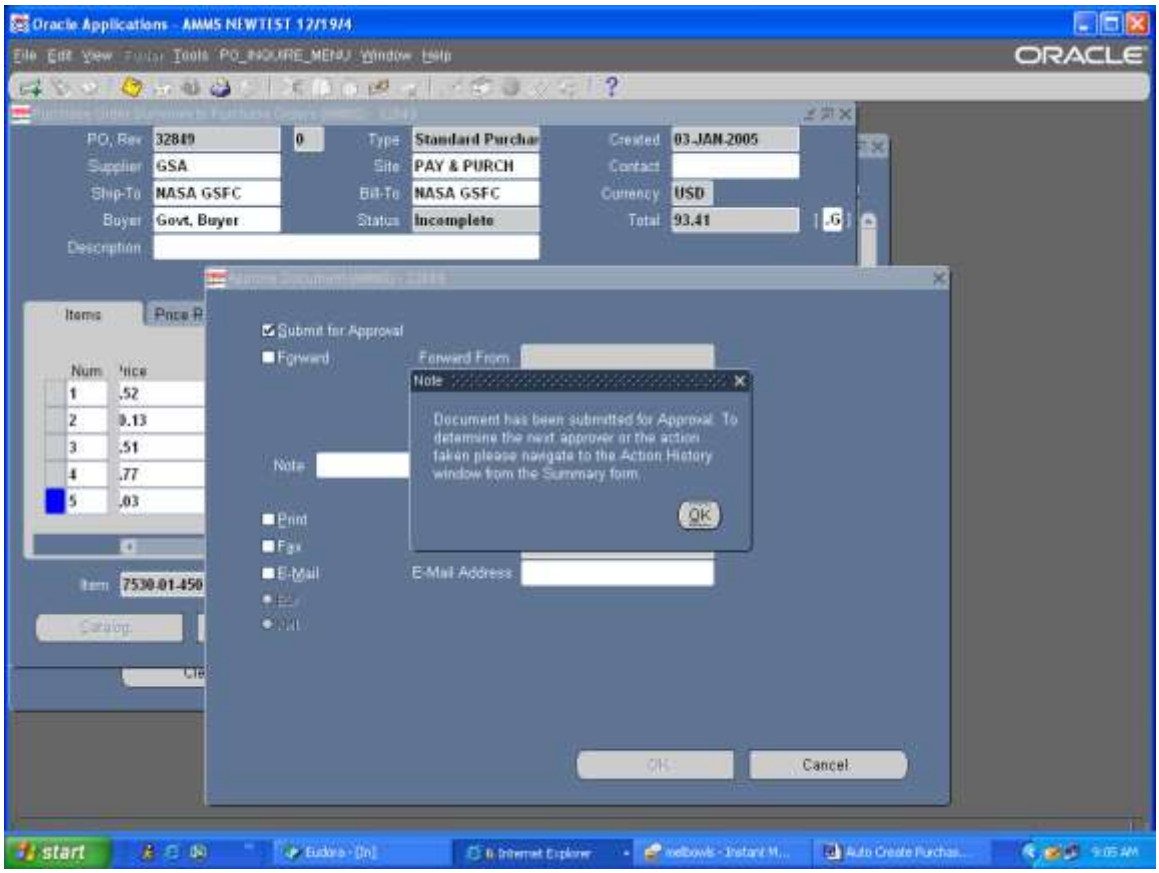
Step Description: Remove the Check Mark from the Email box and click on the OK button.

Expected Results: A Note window will appear

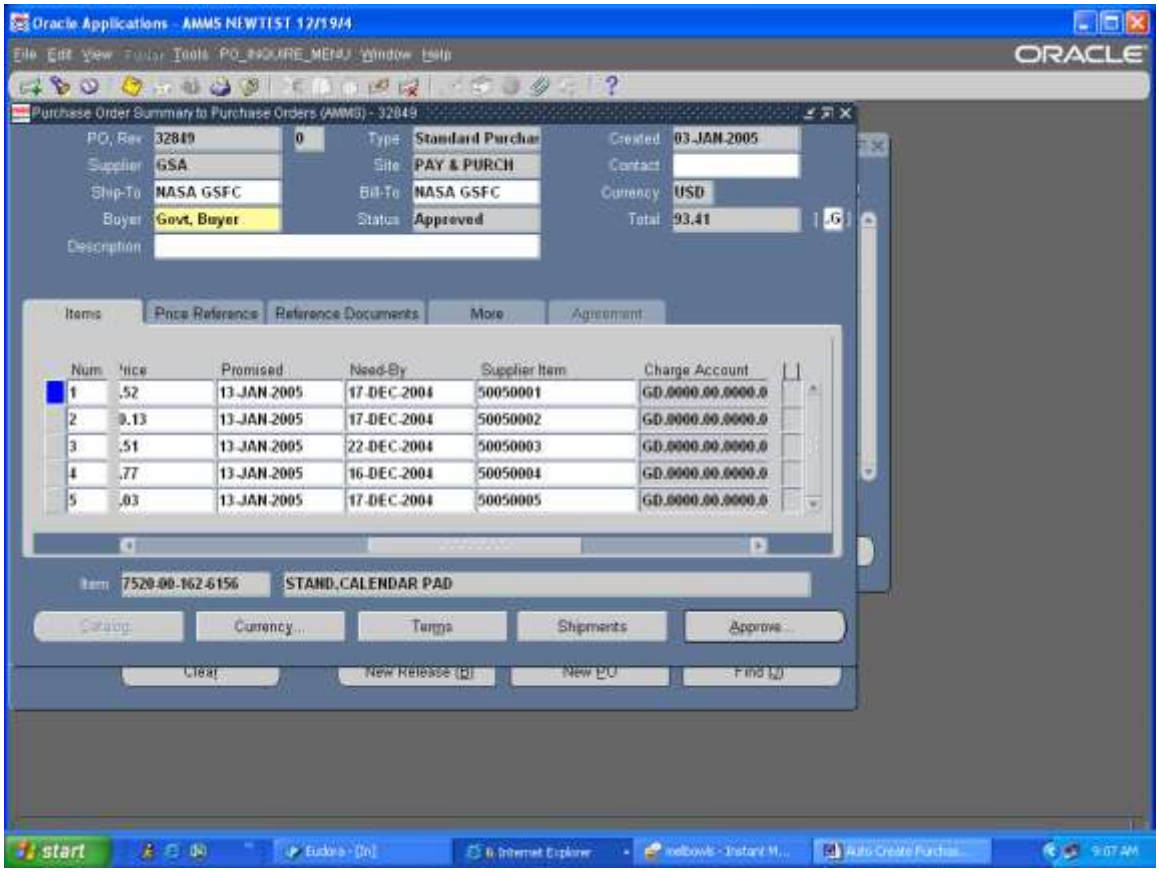


Step Description: The Note window tells you that the “document has been submitted for approval” click OK to the Note window.

Expected Results: You will return to the Purchase Order Summary to Purchase Order window



Step Description: Take note that the Status on the PO is now Approved



You are complete. You have created your purchase order.

AMMS TRAINING SCRIPT
Auto-Create Purchase Orders

Purpose

The purpose of this training script is to show how to auto-create Purchase Orders

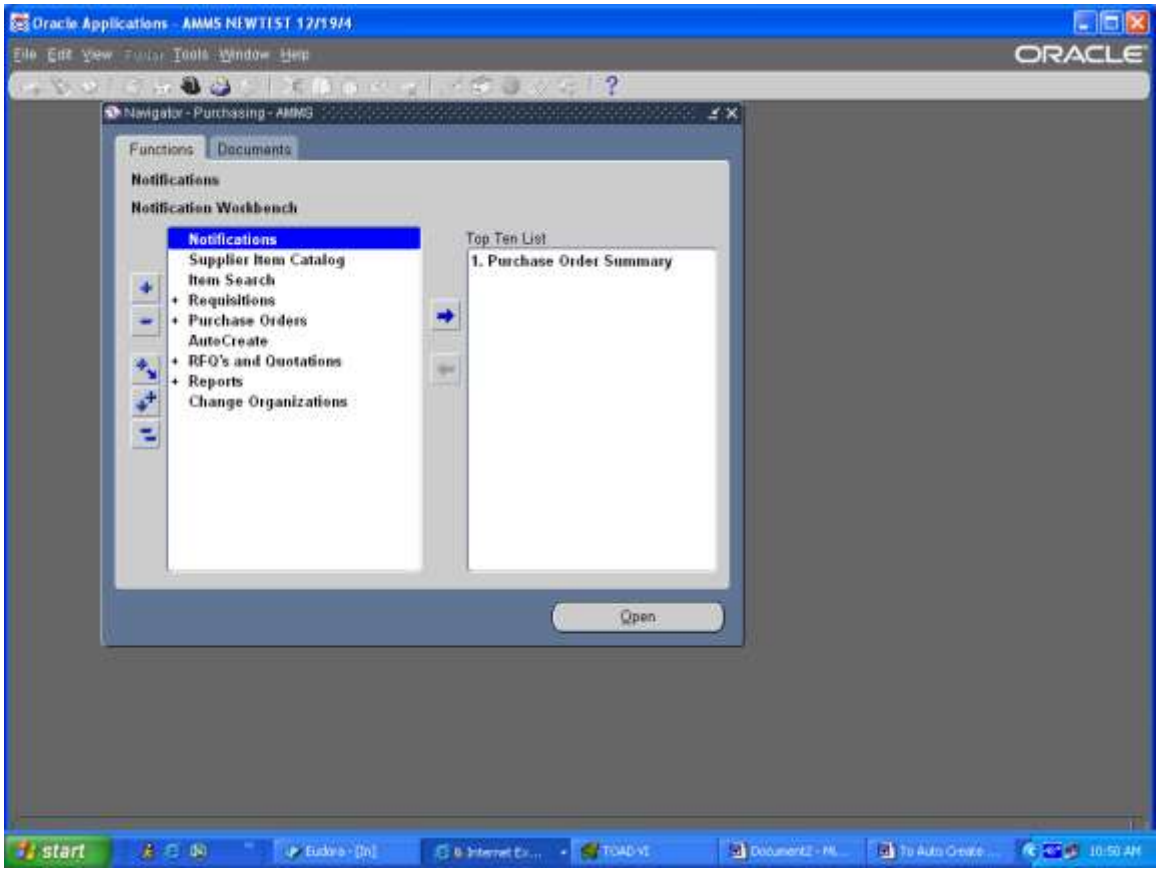
Audience

Buyers, and Material Coordinators

Prepared By	Theresa Coulson
Creation Date:	01/03/2004
Document Name	Auto Create Purchase Orders.doc
Version	3
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Purchasing.	

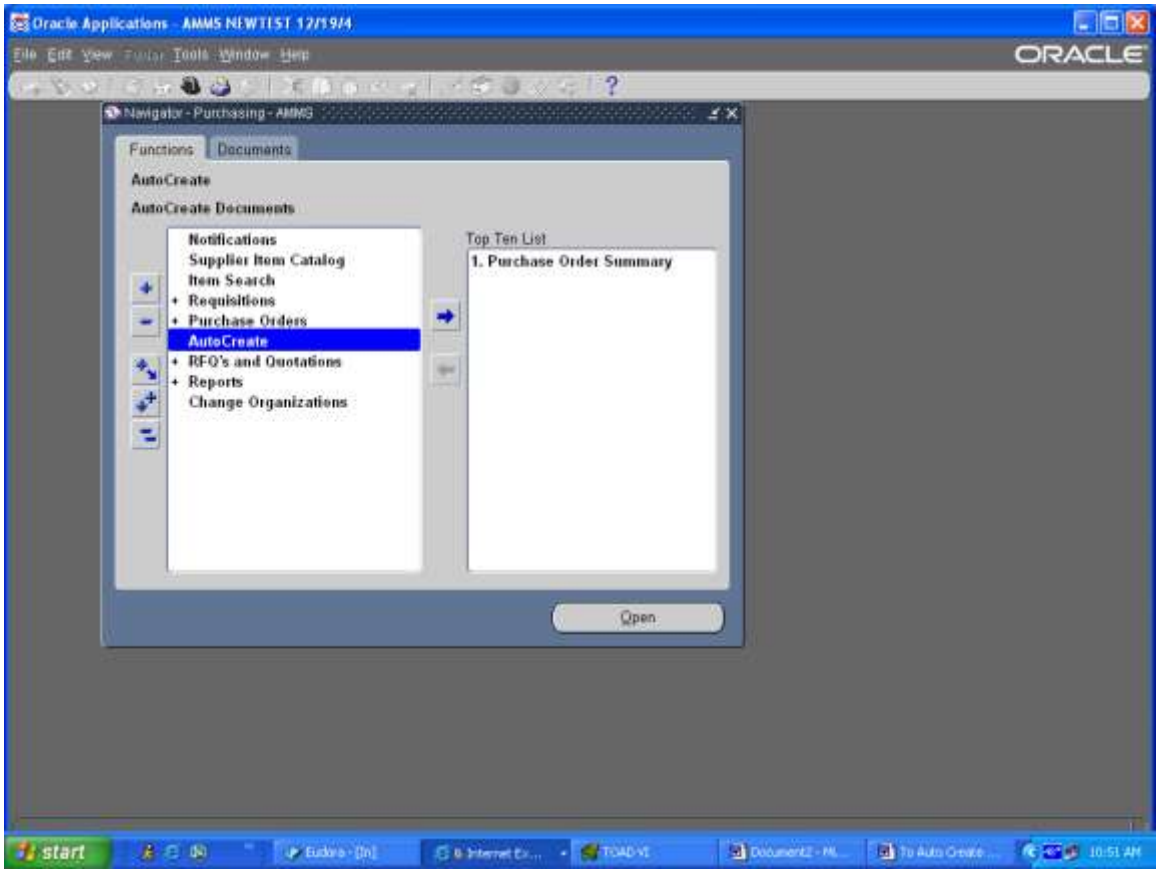
Step Description: Sign onto Oracle and select the Purchasing AMMS responsibility

Expected Results: The Purchasing AMMS main menu will appear



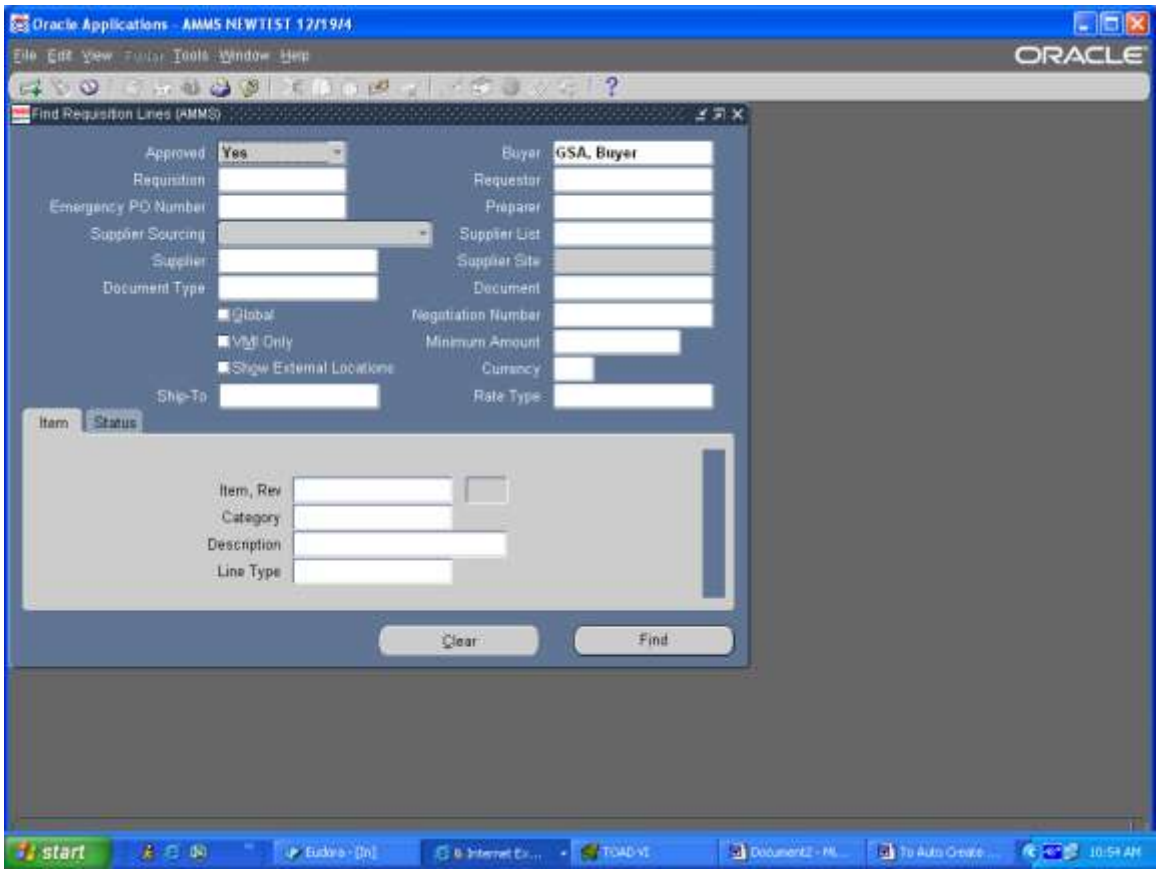
Step Description: Select from the Purchasing AMMS main menu Auto Create and click on the Open button

Expected Results: The Find Requisition Lines window will appear



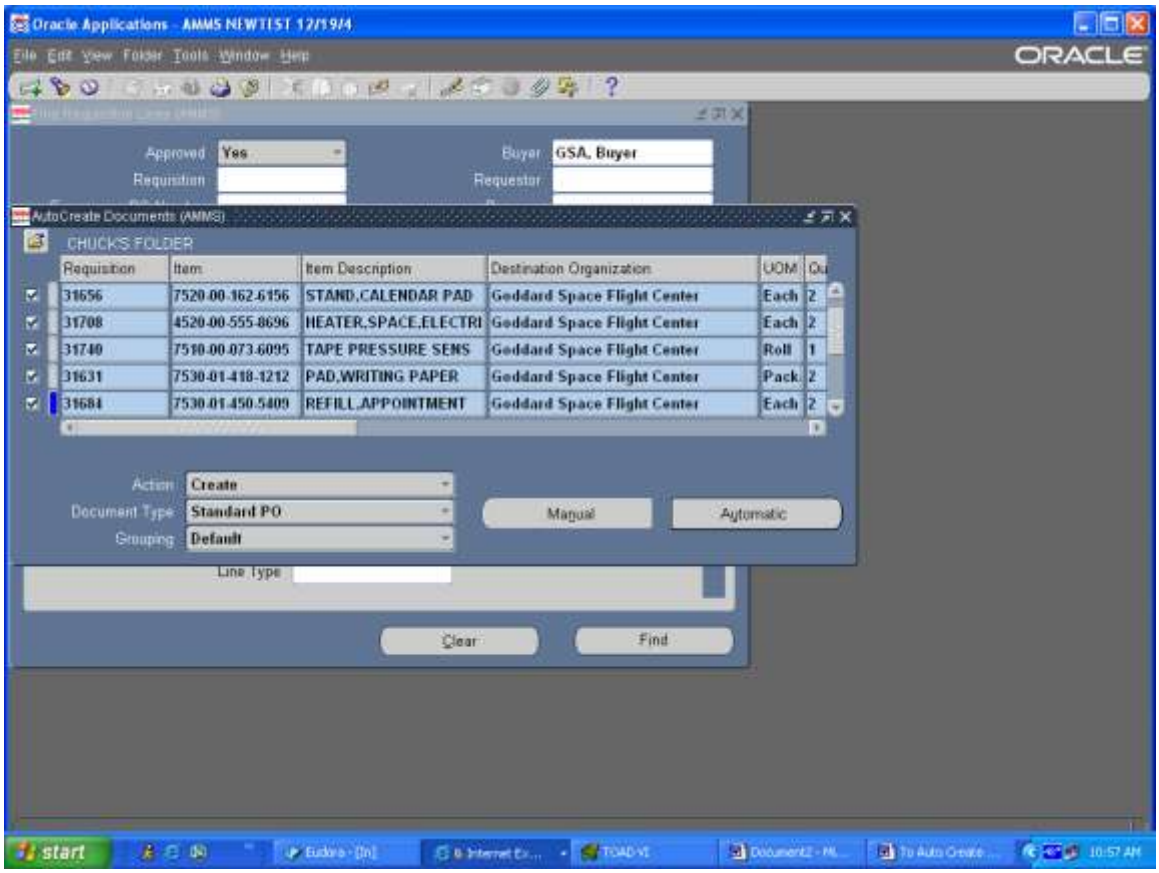
Step Description: Make sure the Approved field is set to Yes. In the Buyer field enter the name of the buyer who's requisitions you want to access. Click on the Find Button

Expected Results: The Auto Create Documents window will open



Step Description: Select the requisitions you want to put onto a Purchase Order by placing a check mark in the box to the left, the line will turn blue, you can select multiple lines

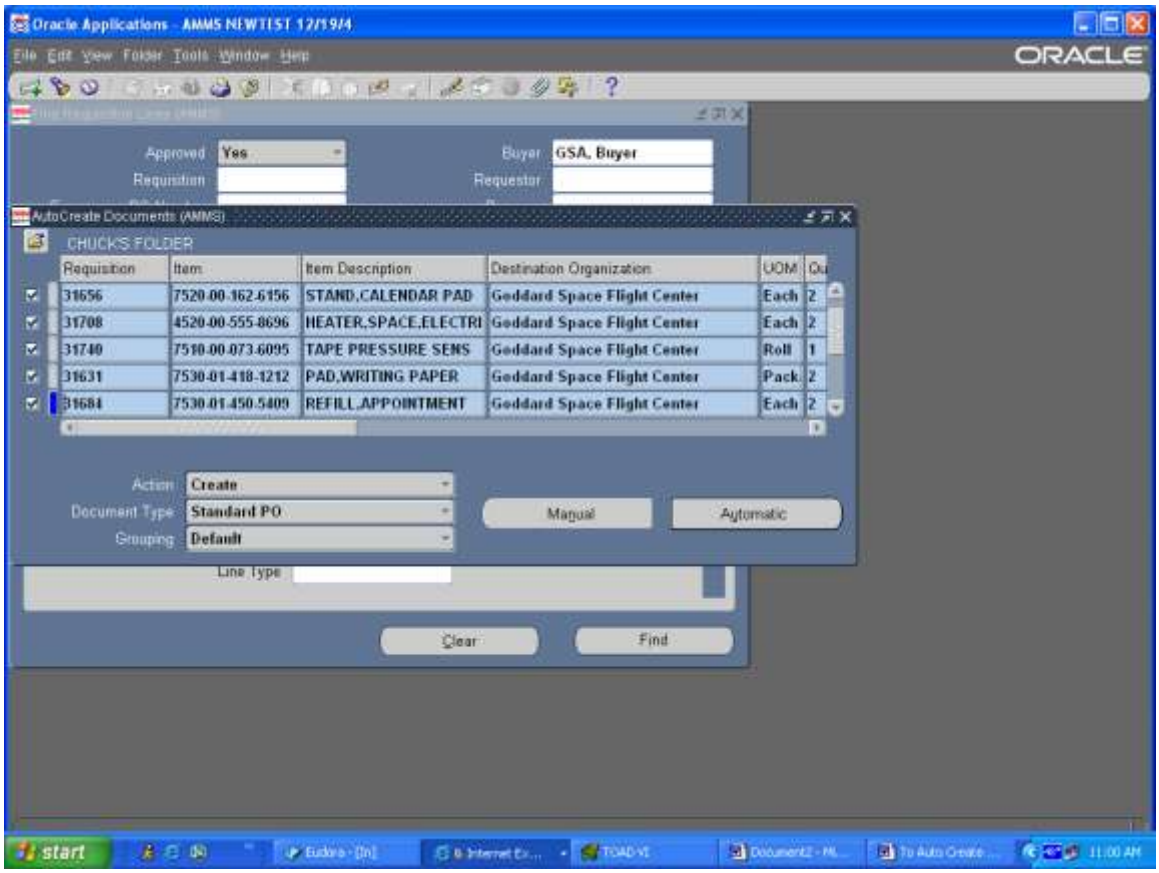
Expected Results: All lines selected will be blue



Note: This screen will give you detailed information, requisition number, item number, quantity, and the Destination Organization. Goddard and Wallops requisitions are not (normally) to be placed on the same purchase orders. So please take not of the Destination Organization when creating your purchase orders.

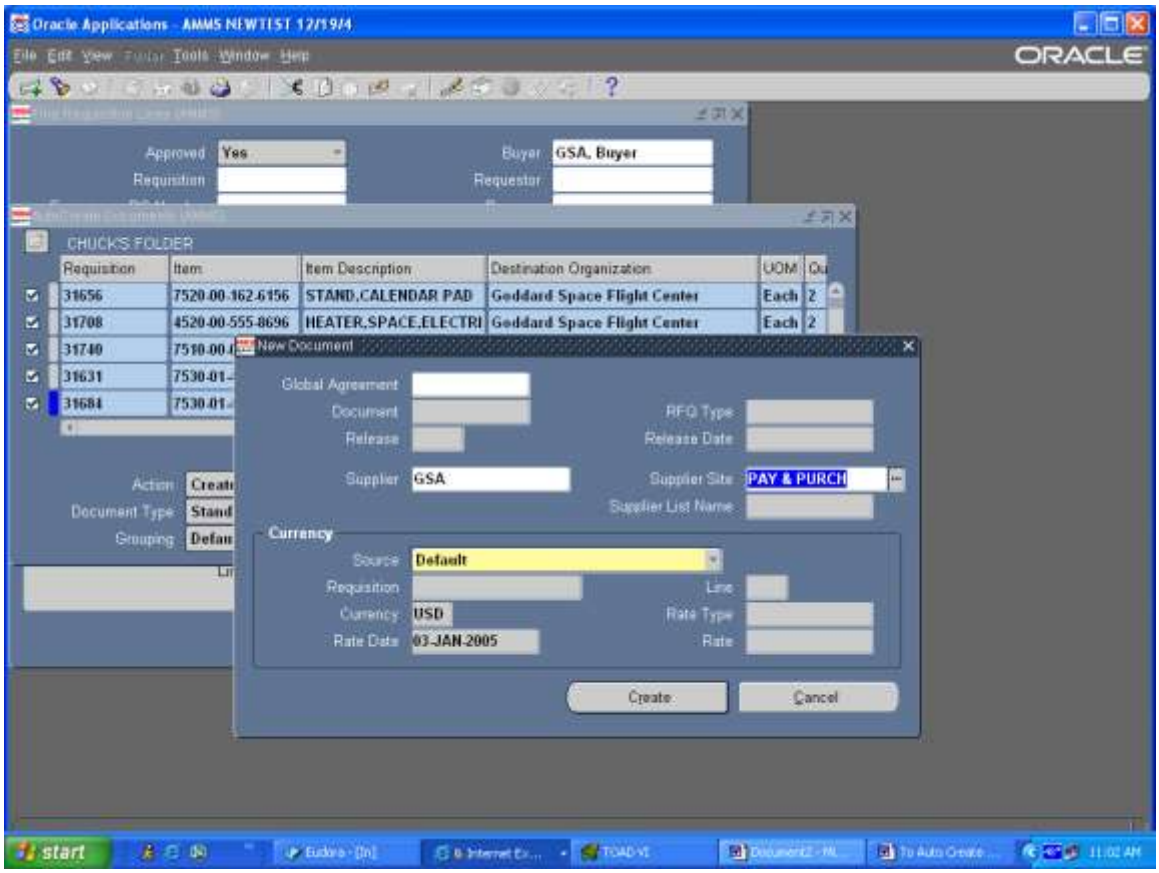
Step Description: At the bottom of the Auto Create Documents window, make sure that the Action is set to Create, the Document Type is set to Standard PO and the Grouping is Default. Now click on the Automatic button.

Expected Results: The New Documents window will appear



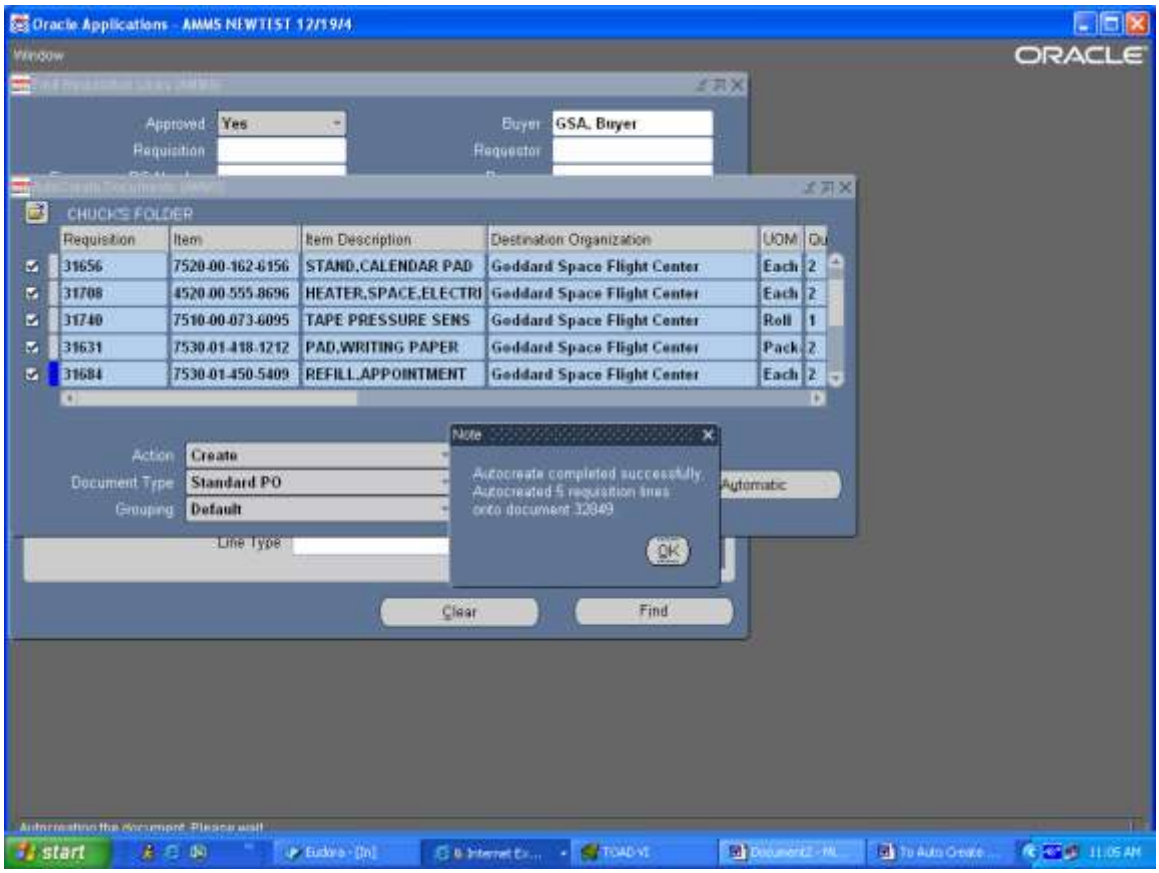
Step Description: At the New Documents window in the Supplier field click on the LOV and select the correct Supplier that the material is being bought from. Once you have populated the Supplier field click on the Create Button.

Expected Results: A Note window will appear



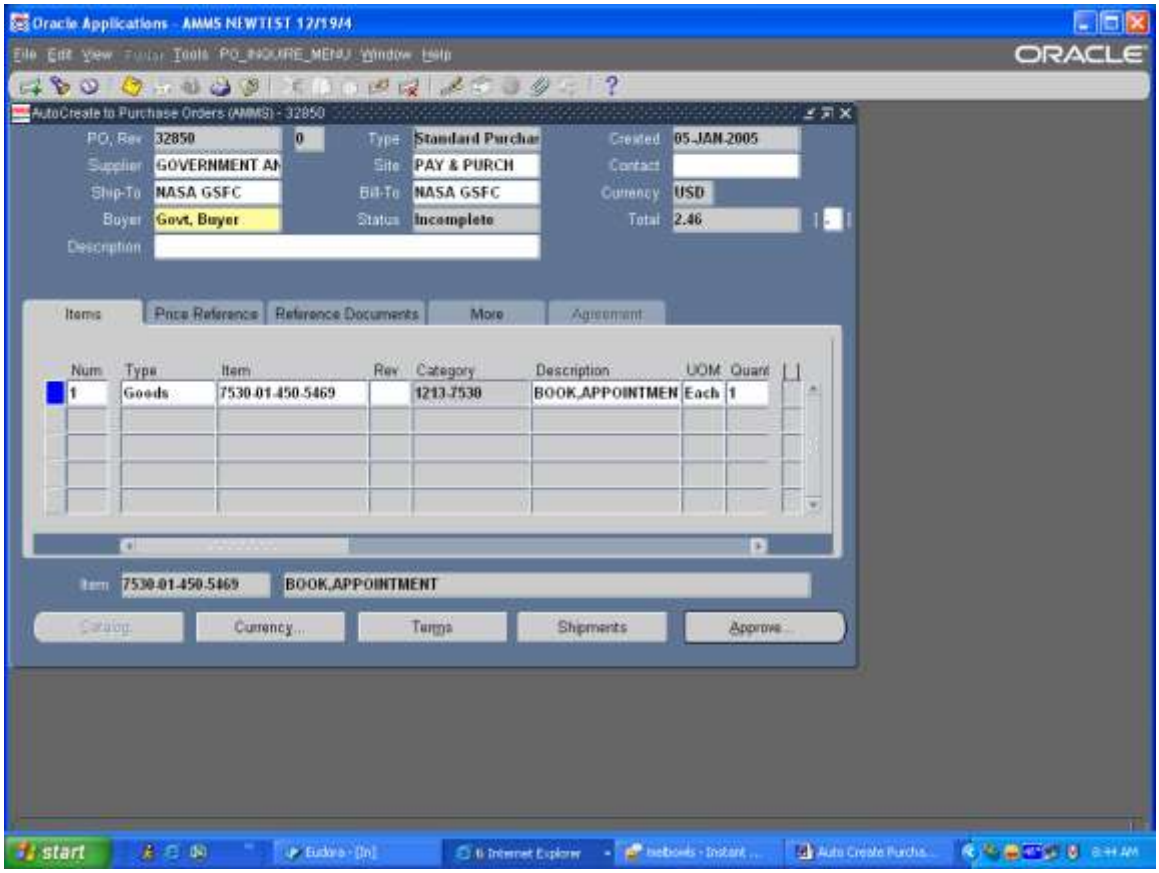
Step Description: At the Note window you will see your Oracle Purchase Order number and how many requisitions are on the purchase order. Please take note of this information. Click OK to the Note window.

Expected Results: The Auto Create to Purchase Order window will appear



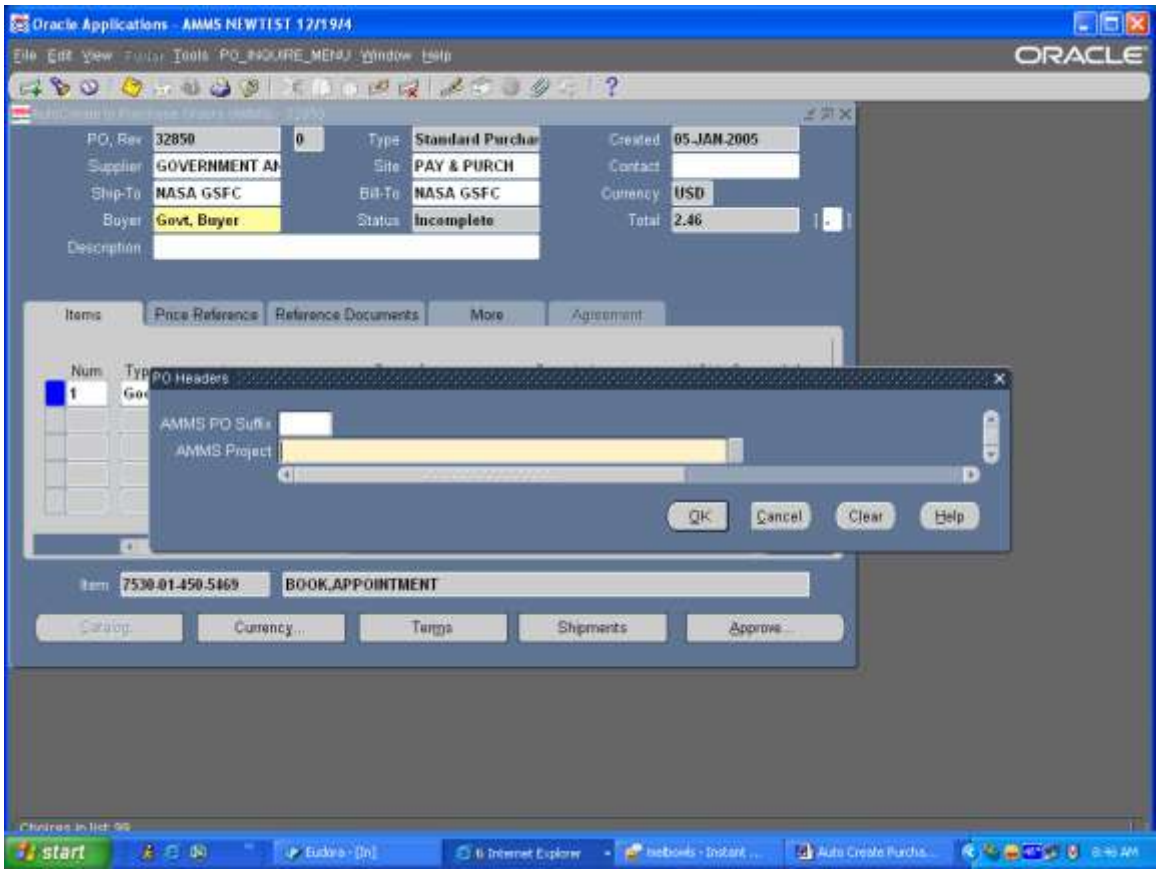
Step Description: Click in the Descriptive Flex Field, the field with the [ ] around them. This is where you will assign the GL number.

Expected Results: PO Header window will open



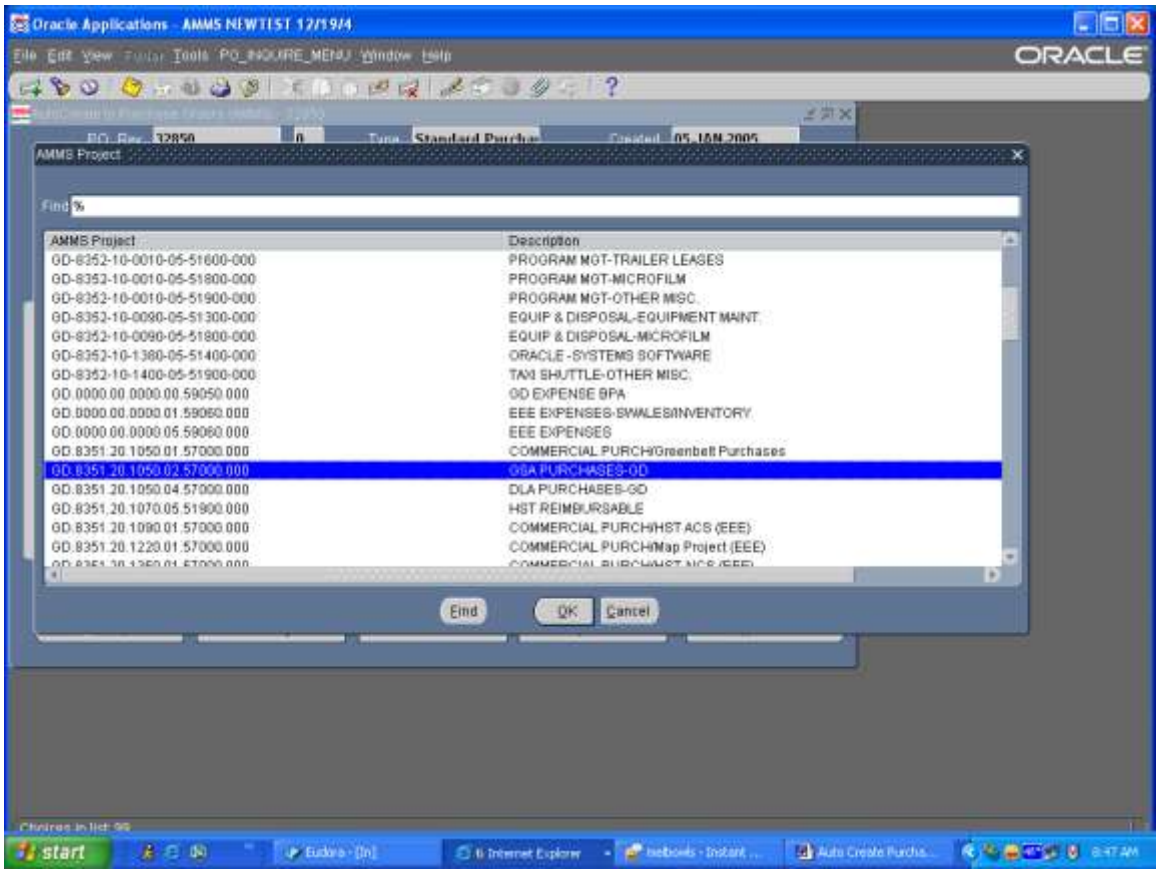
Step Description: At the PO header window if there is a Suffix for this PO please enter it here. Examples: EEE. Click in the AMMS Project field and click on the LOV.

Expected Results: AMMS Project window will appear with a list of GL numbers



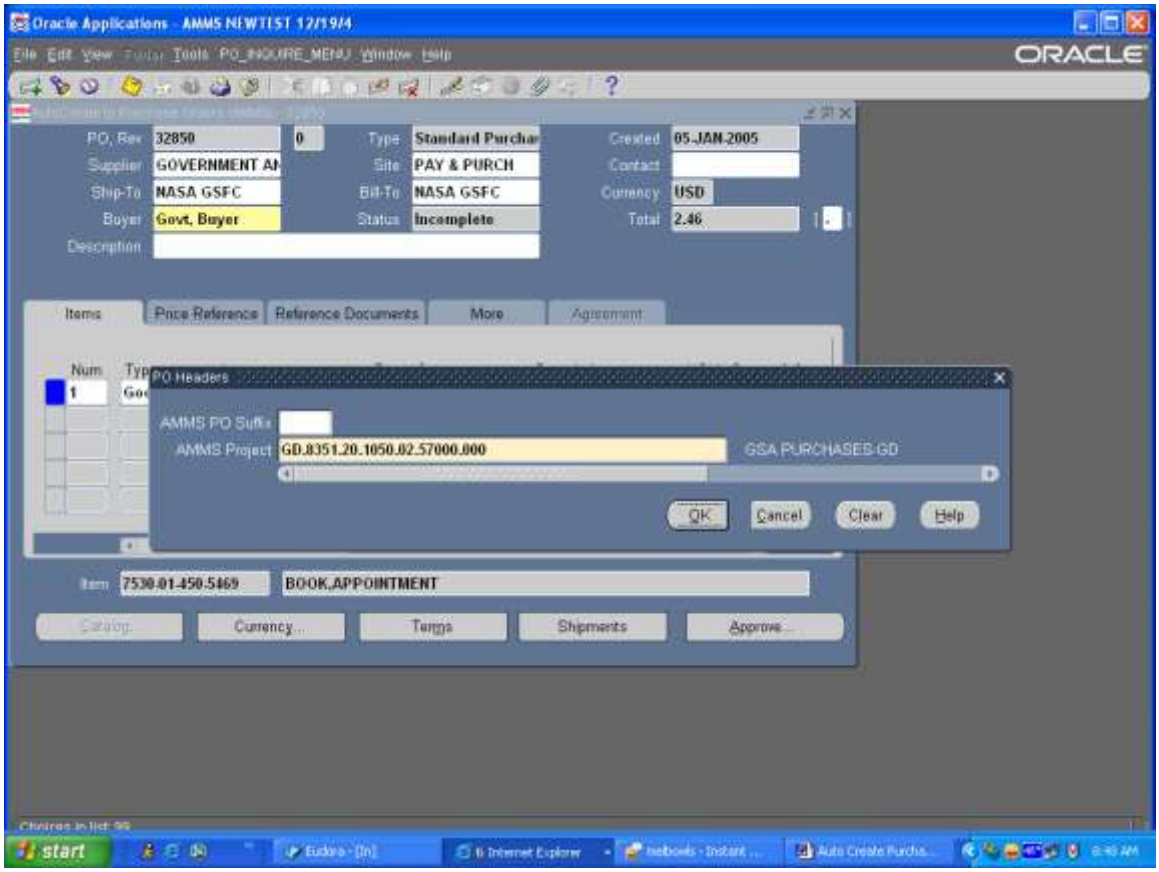
Step Description: Select the appropriate GL number from the list provided. Click on the OK button.

Expected Results: You will return to the PO Header window and the AMMS Project field will be populated with a GL number



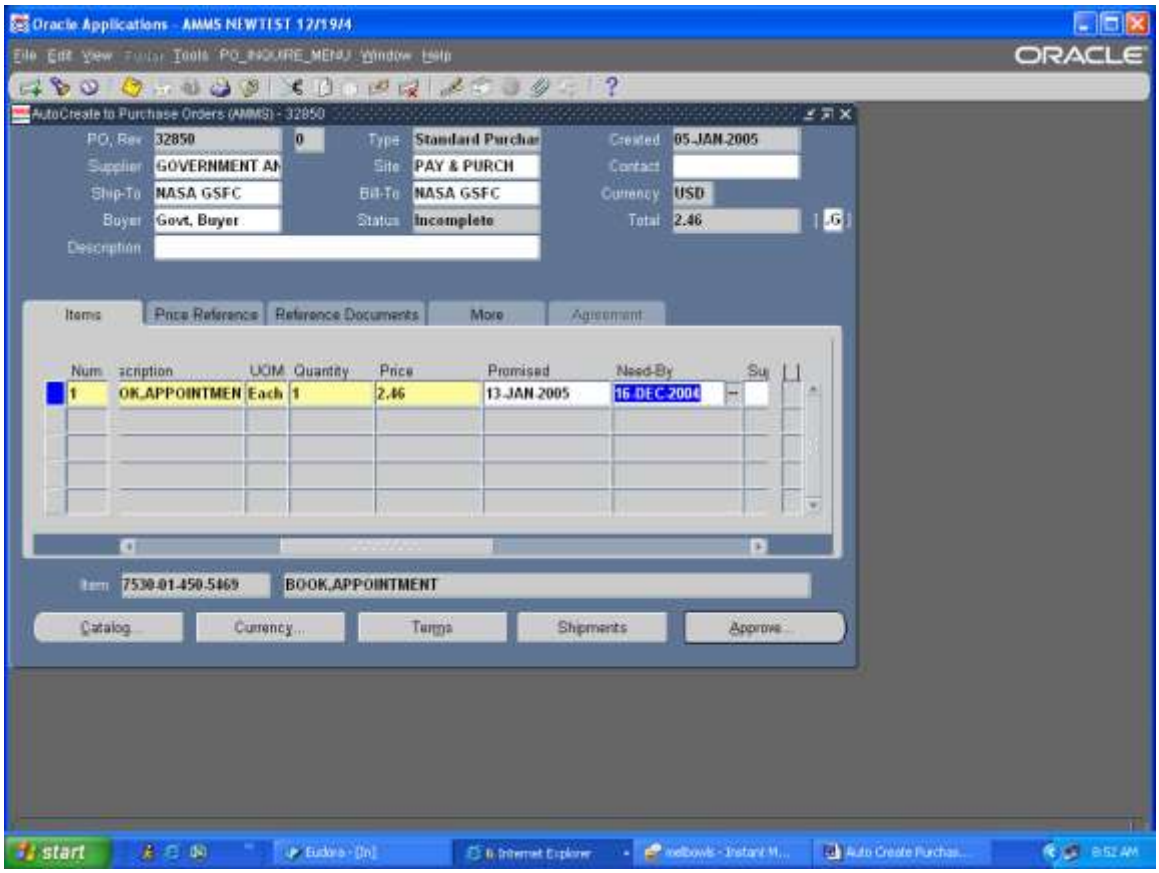
Step Description: Click OK to the PO Header window.

Expected Results: You will return to the Auto Create to Purchase Order window



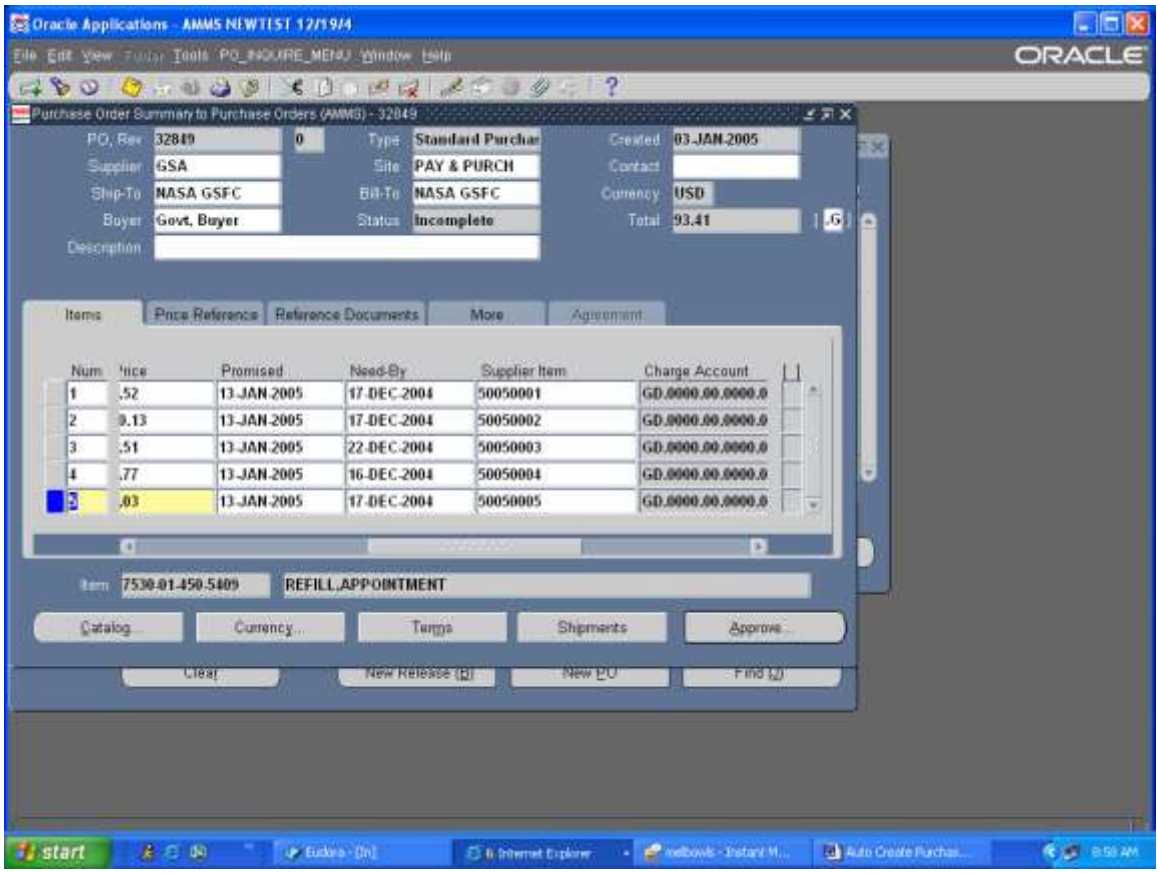
Step Description: Use the scroll bar to move to the Price field update this cost if necessary. At the Promised field click on the LOV and select the Promised date. Click in the Need by field, enter the same date as the Promised field.

Expected Results: Fields will be populated



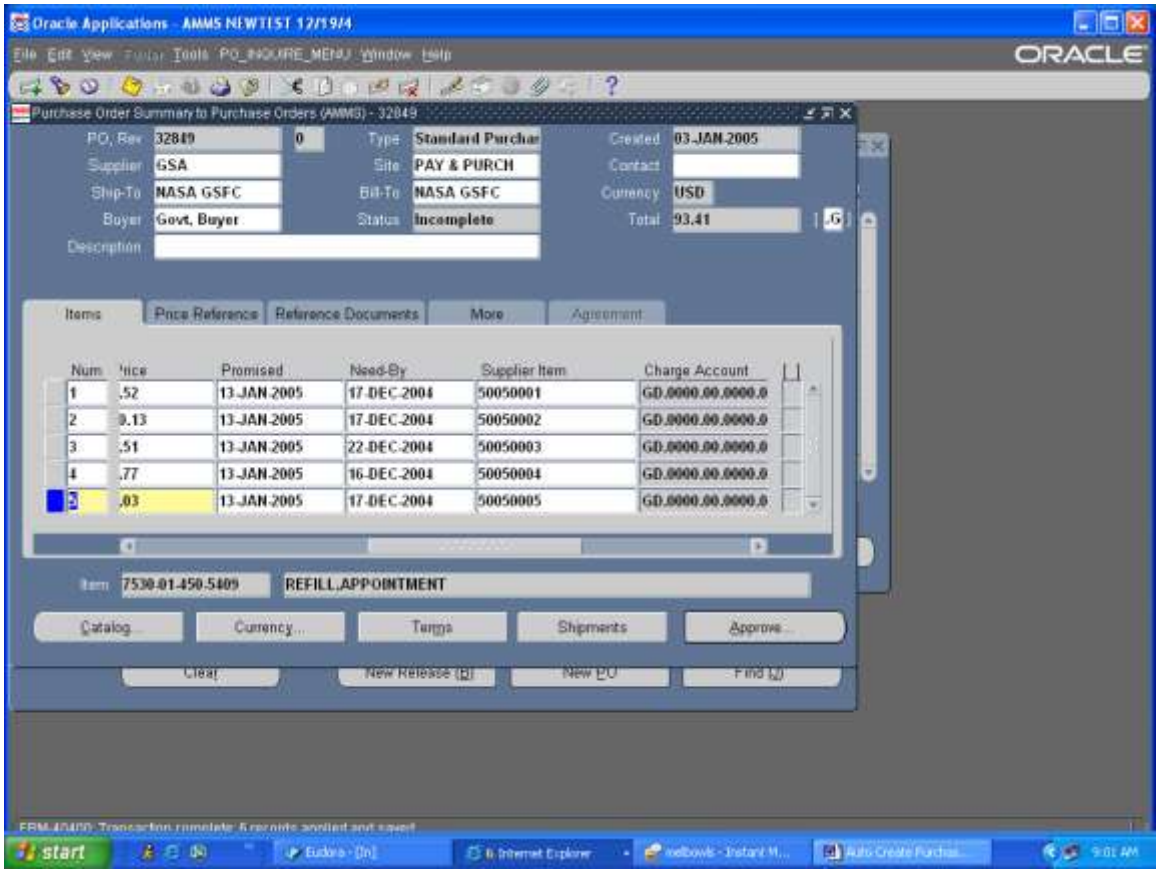
Step Description: Scroll over to the Supplier Item field. This is where you will enter a Part Number for local purchases. For Govt Purchases you will enter the document number the item will be submitted with. The document number consists of the Julian Date and sequential number. Example: 50050001……5005 is the Julian date, 5 is the year and 005 is the day……..0001 is the first number in the sequence. You will need to number these sequential for Goddard and Wallops. So if Goddard stops at 0010, Wallops will start at 0011.

Expected Results: Field will be populated



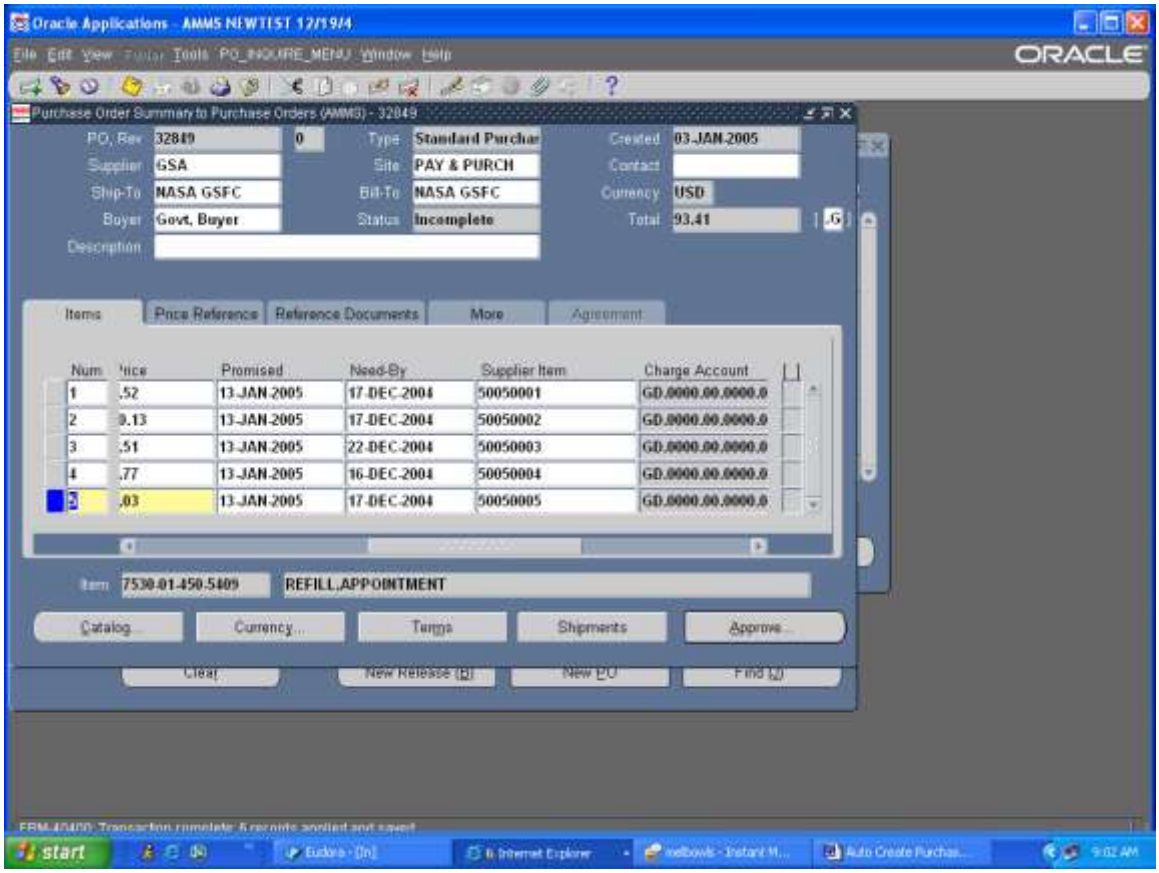
Step Description: Save your work

Expected Results: Transactions Saved and Applied



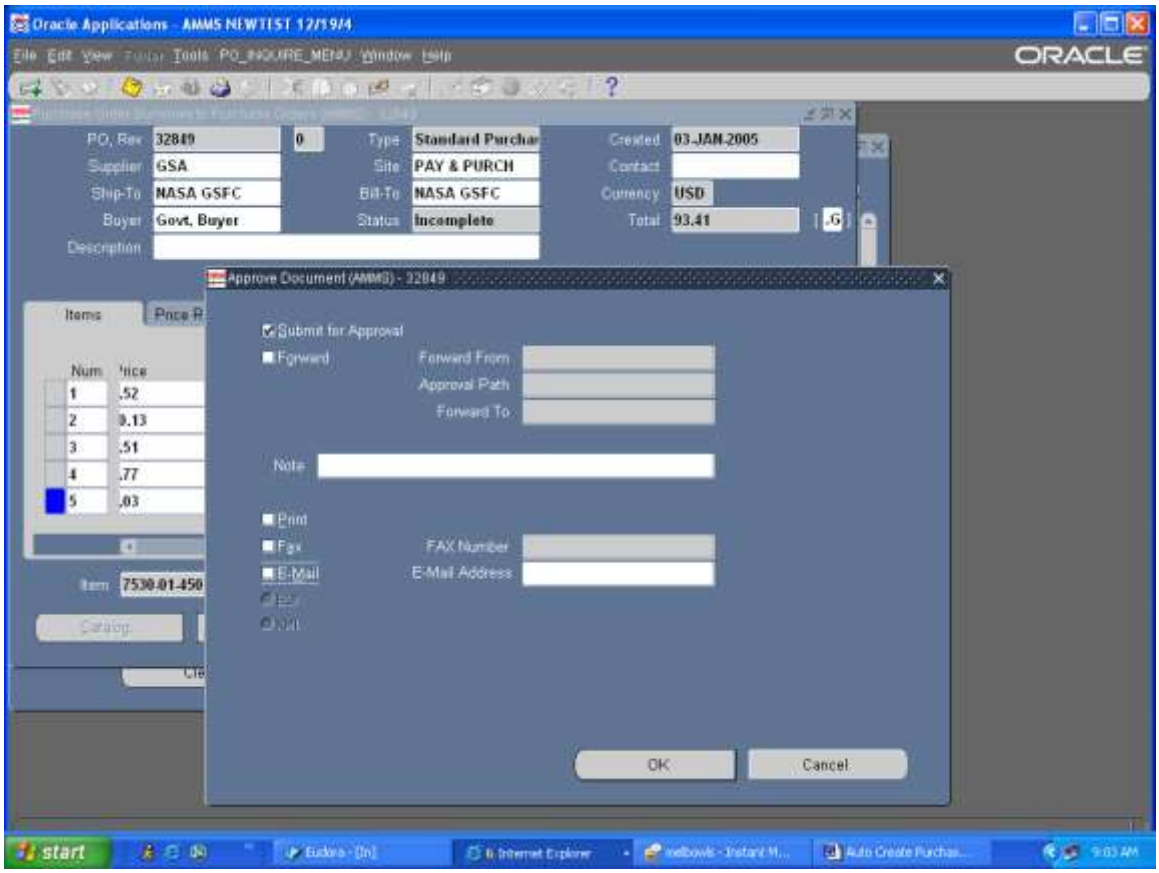
Step Description: Click on the Approve button.

Expected Results: The Approval Documents window will open.



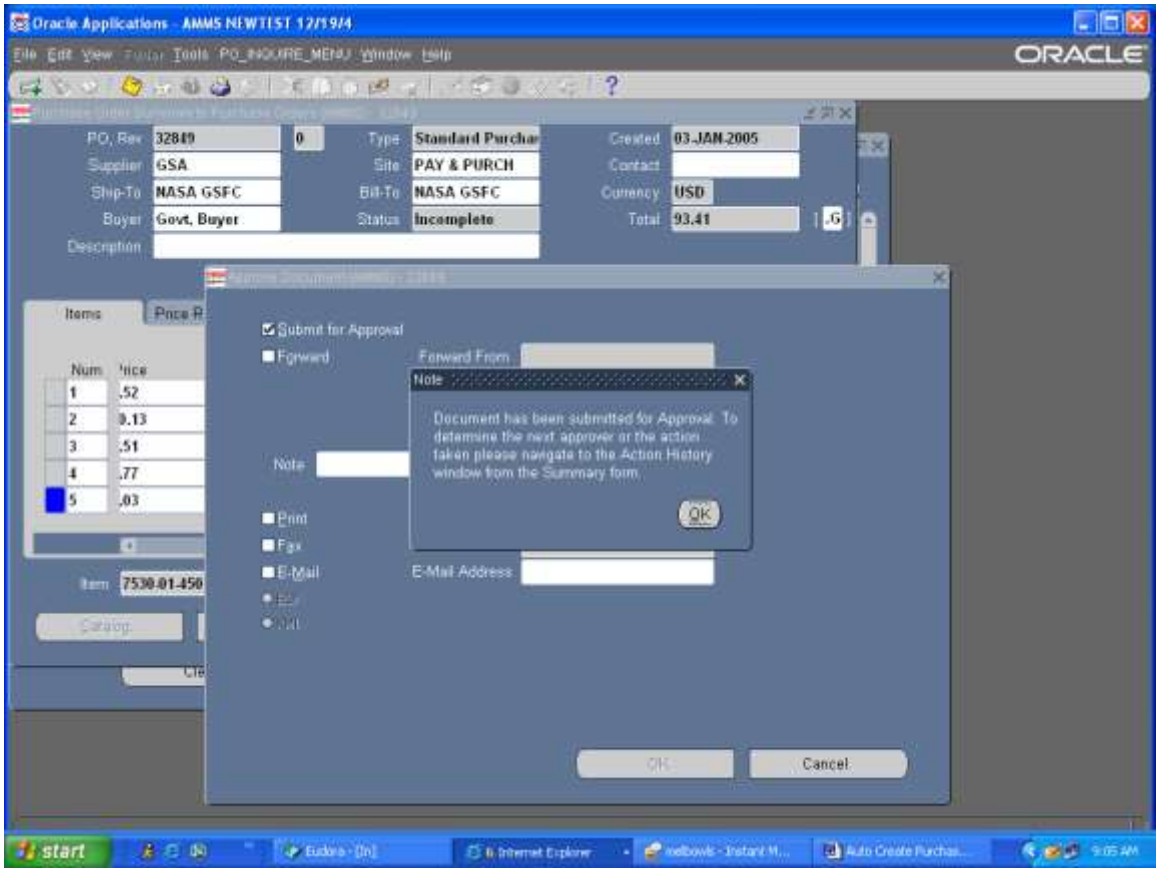
Step Description: Remove the Check Mark from the Email box and click on the OK button.

Expected Results: A Note window will appear

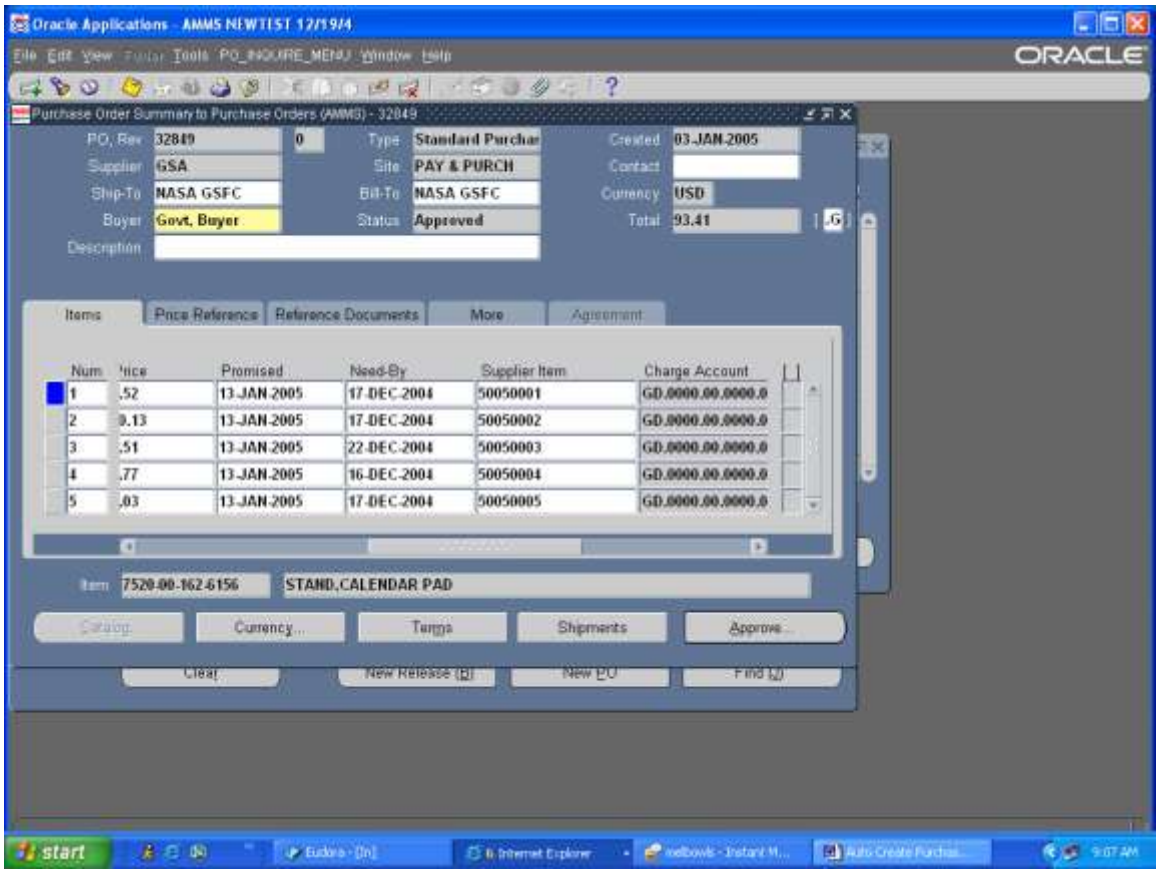


Step Description: The Note window tells you that the "document has been submitted for approval" click OK to the Note window.

Expected Results: You will return to the Purchase Order Summary to Purchase Order window



Step Description: Take note that the Status on the PO is now Approved



You are complete. You have created your purchase order.

AMMS TRAINING SCRIPT

Auto Create Requisition onto Existing Purchase Order

Purpose

The purpose of this training script is to show Buyers how to auto create a requisition onto an existing purchase order in Oracle.

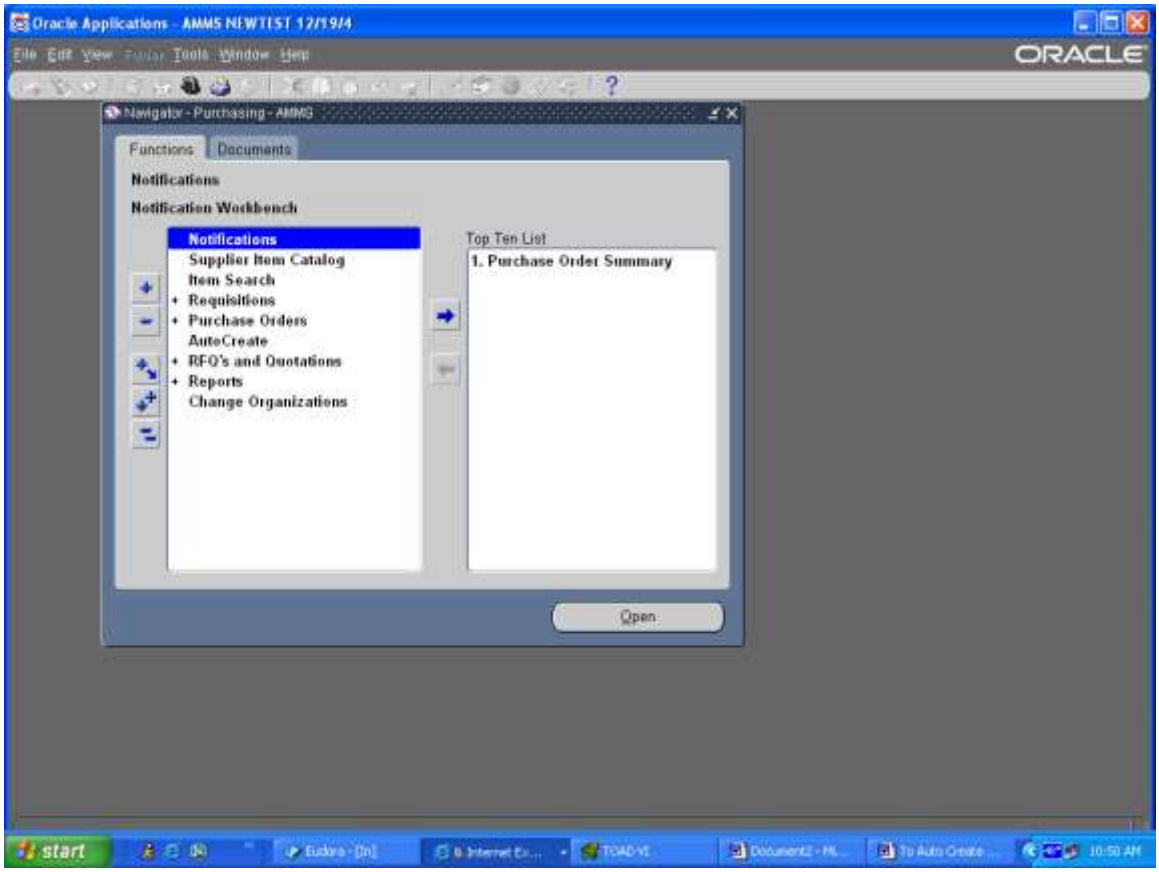
Audience

Buyers

Prepared By	Theresa Coulson
Creation Date:	08/05/2005
Document Name	AutoCreate Requisition to Existing Purchase Order.doc
Version	3
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Purchasing.	

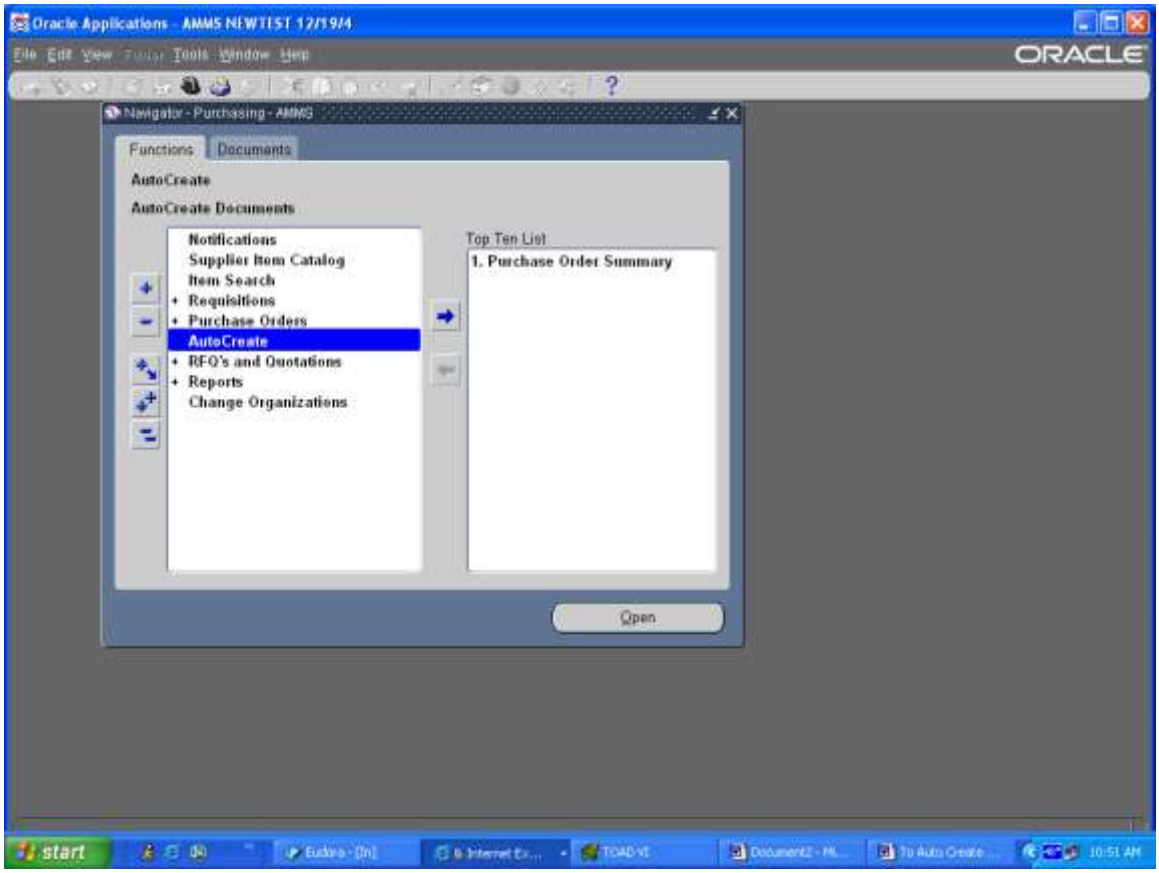
Step Description: Sign onto Oracle and select the Purchasing AMMS responsibility

Expected Results: The Purchasing AMMS main menu will appear



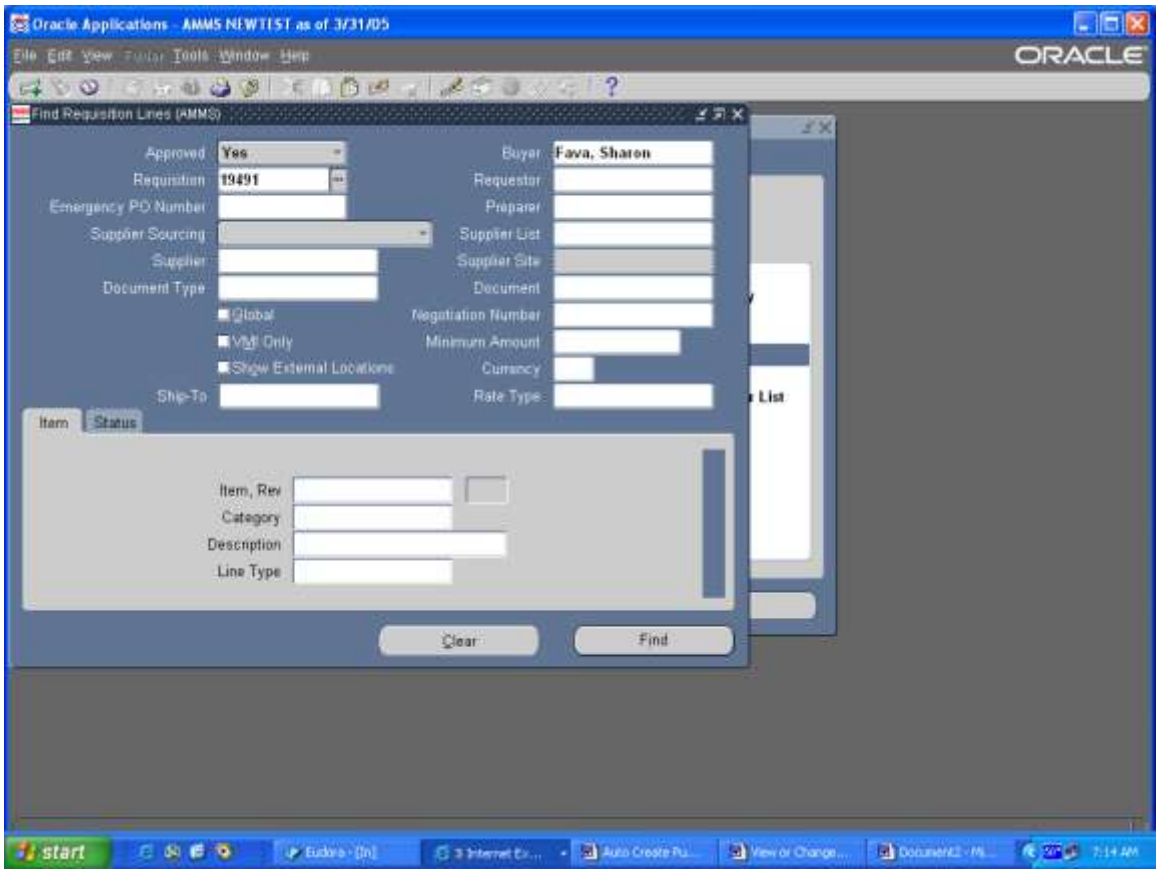
Step Description: Select from the Purchasing AMMS main menu Auto Create and click on the Open button

Expected Results: The Find Requisition Lines window will appear



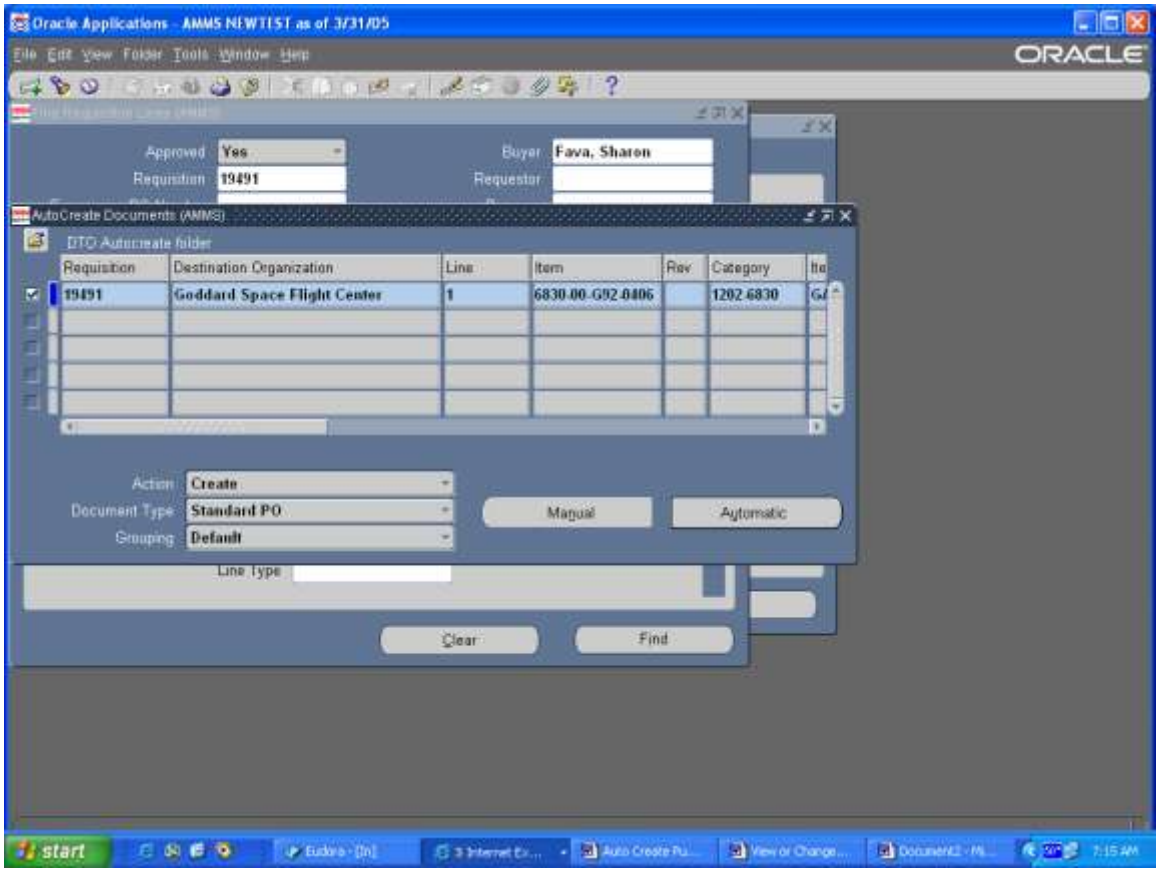
Step Description: Make sure the Approved field is set to Yes. In the requisition field enter the requisition number you want to add to the existing purchase order. Click on the Find Button

Expected Results: The Auto Create Documents window will open



Step Description: Select the requisitions you want to put onto a Purchase Order by placing a check mark in the box to the left, the line will turn blue.

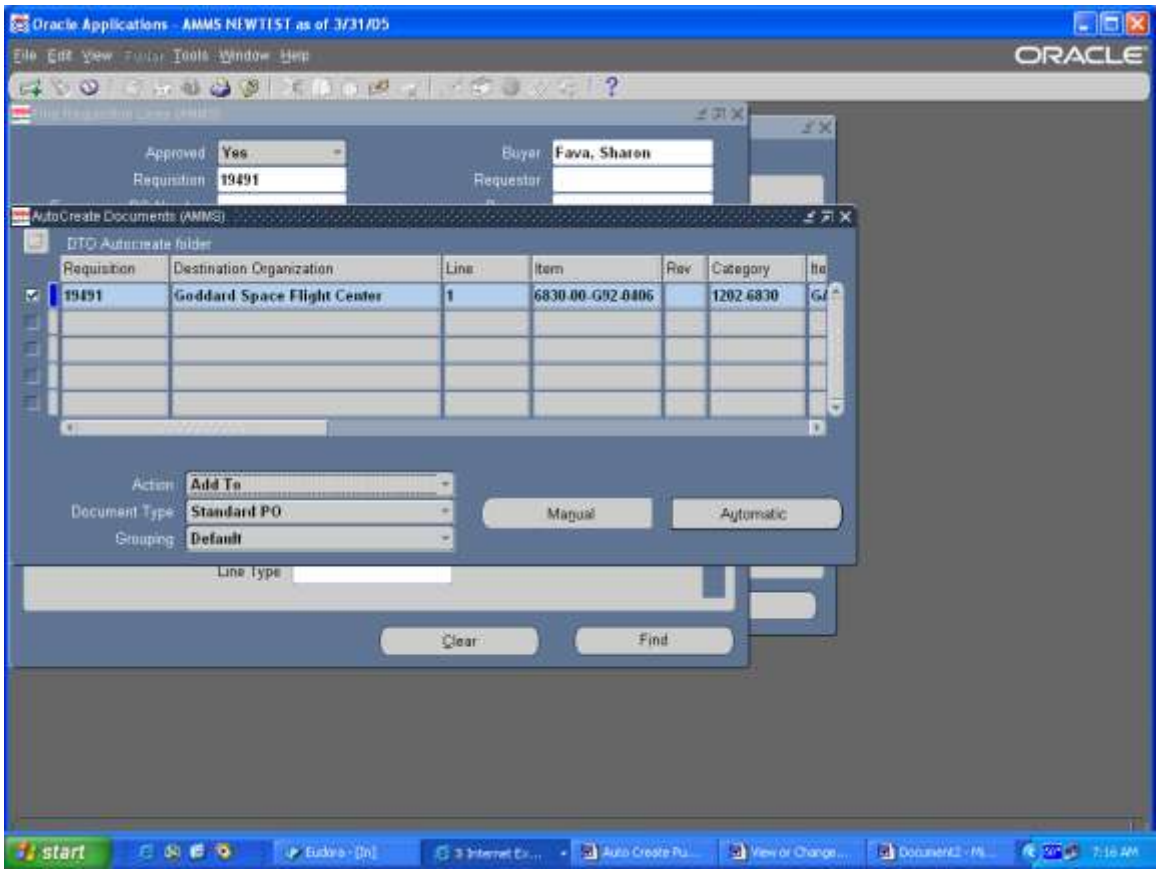
Expected Results: Line selected will be blue



Note: This screen will give you detailed information, requisition number, item number, quantity, and the Destination Organization. Goddard and Wallops requisitions are not (normally) to be placed on the same purchase orders. So please take not of the Destination Organization when creating your purchase orders.

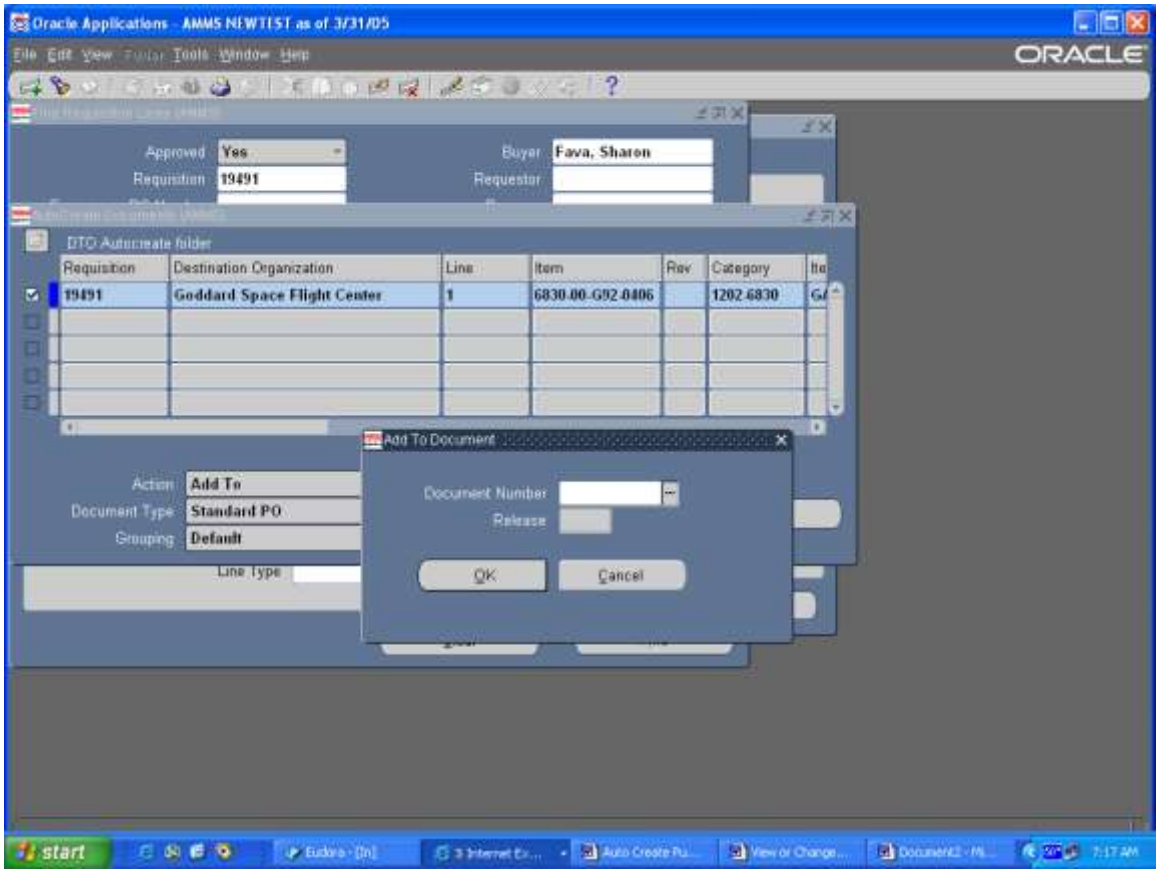
Step Description: At the bottom of the Auto Create Documents window, in the Action field, change this to ADD TO, the Document Type is set to Standard PO and the Grouping is Default. Now click on the Automatic button.

Expected Results: The New Documents window will appear



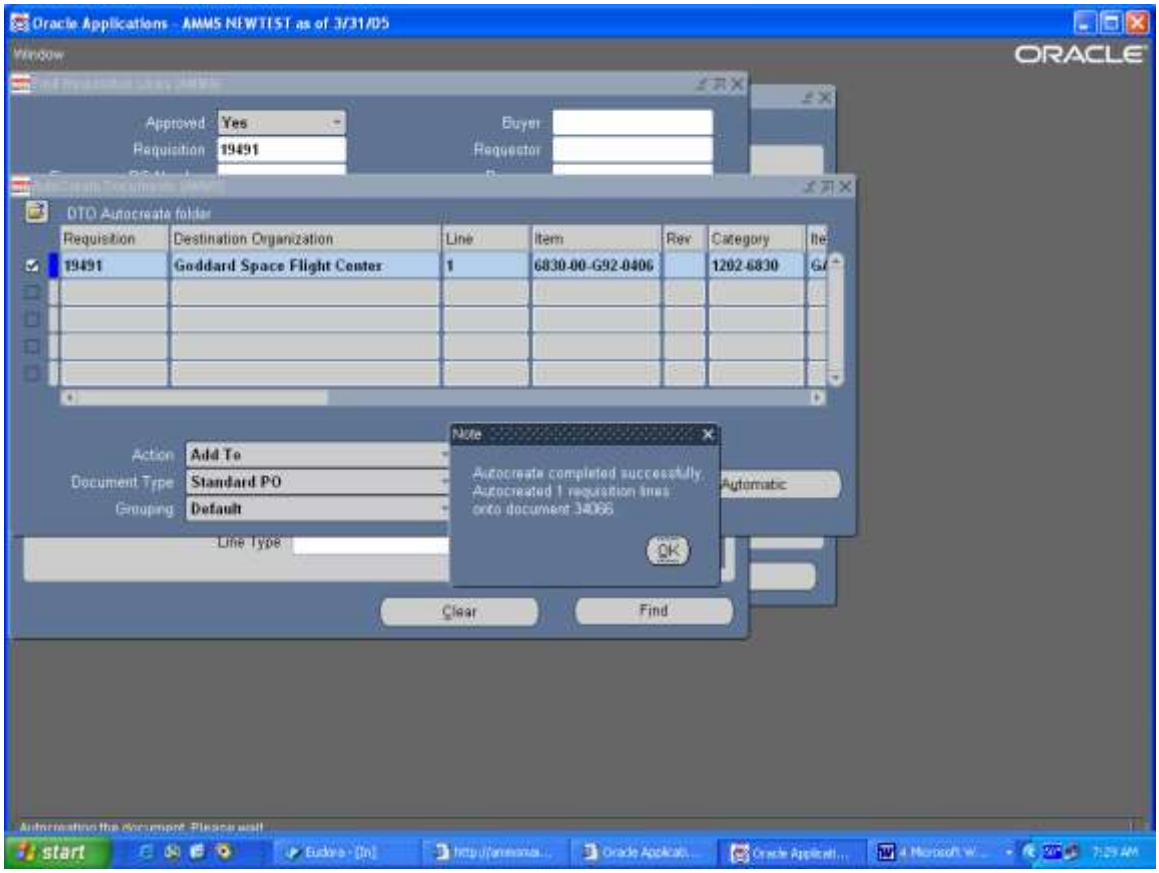
Step Description: At the Add to Document window in the Document Number field enter the Purchase Order number you are adding this requisitions to, click the OK button.

Expected Results: Note window will appear



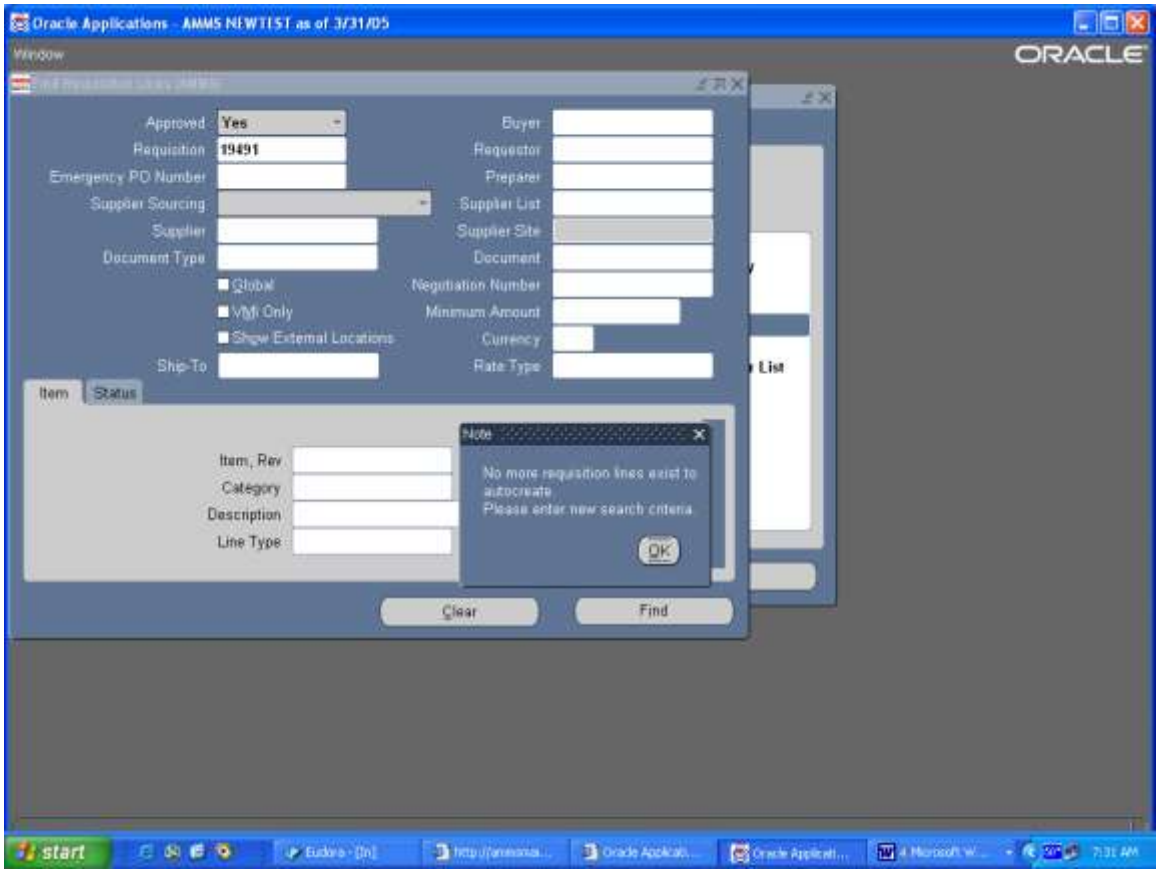
Step Description: The Note window will tell you how many requisitions you have added to the purchase order and reference the purchase order number. Click OK to the Note.

Expected Results: Another Note window will appear



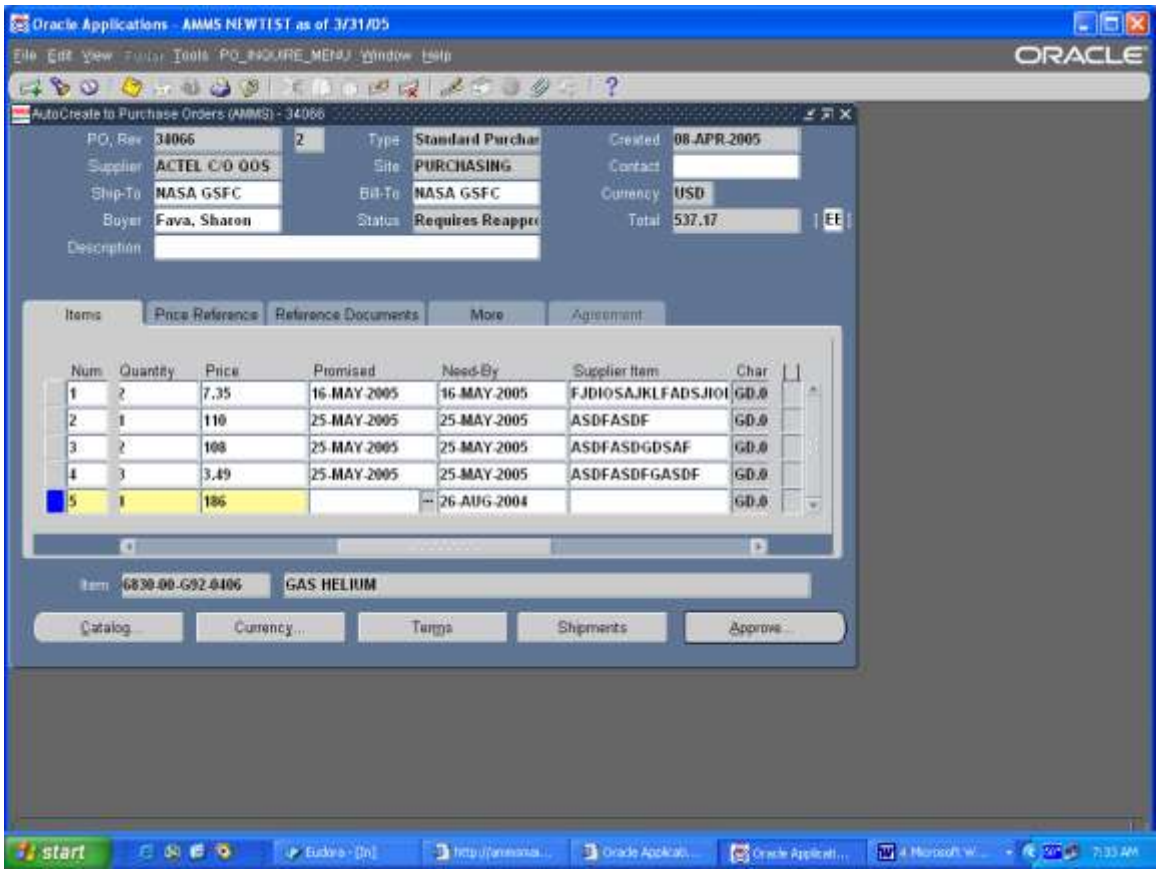
Step Description: Another Note window will appear, No more requisitions exist to autocreate, click OK

Expected Results: Autocreate to Purchase Order window will appear



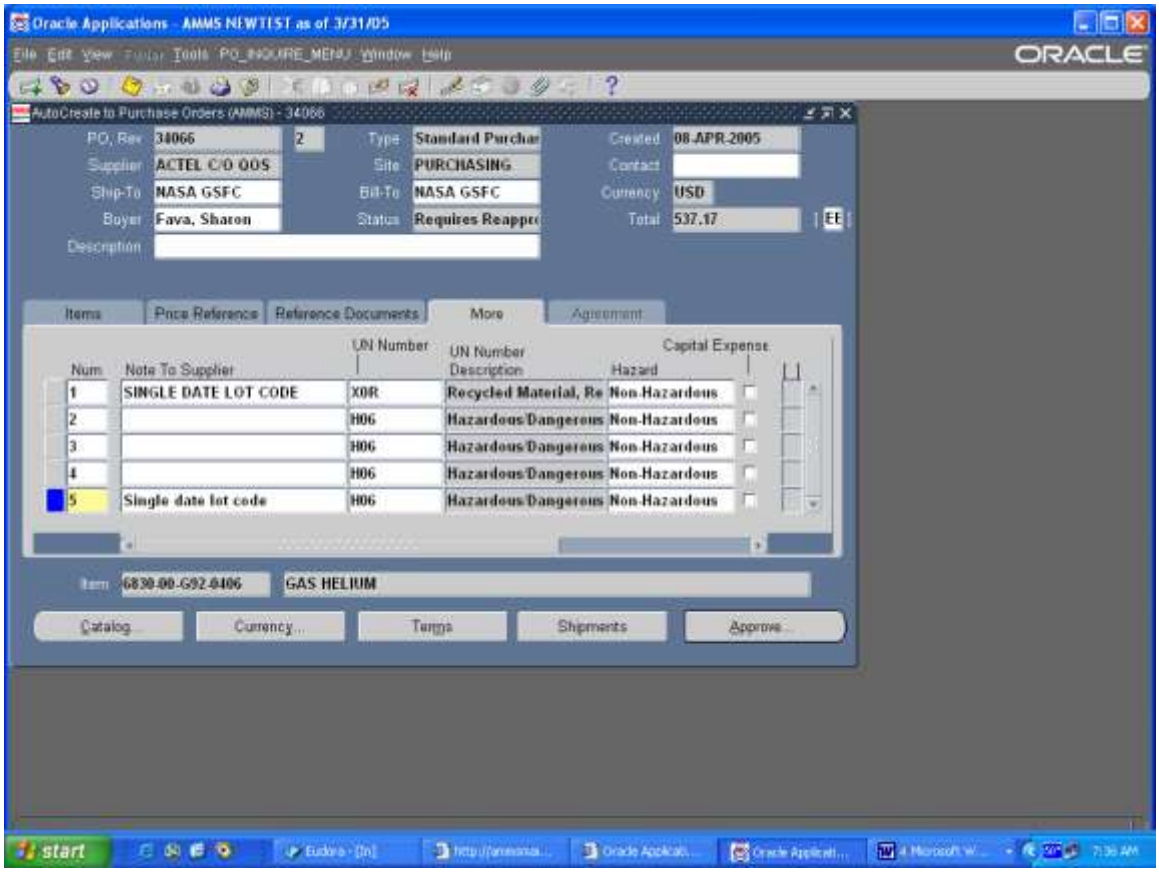
Step Description: The last line on the PO is the line that you added. Make sure all required data is filled in, Promised Date, Need By Date, part number in Supplier Item field, update the cost

Expected Results: Fields will be populated



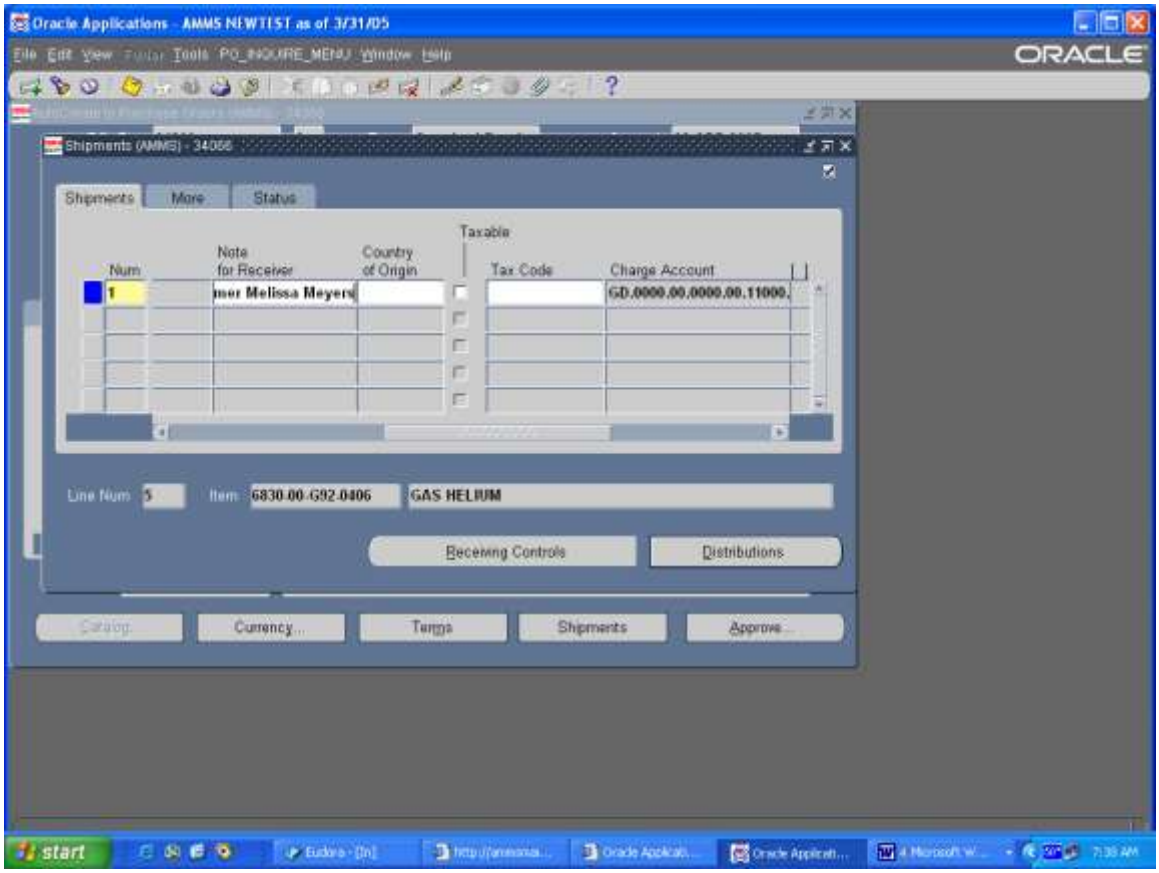
Step Description: Click on the Shipments button at the bottom of the screen.

Expected Results: Window view will change



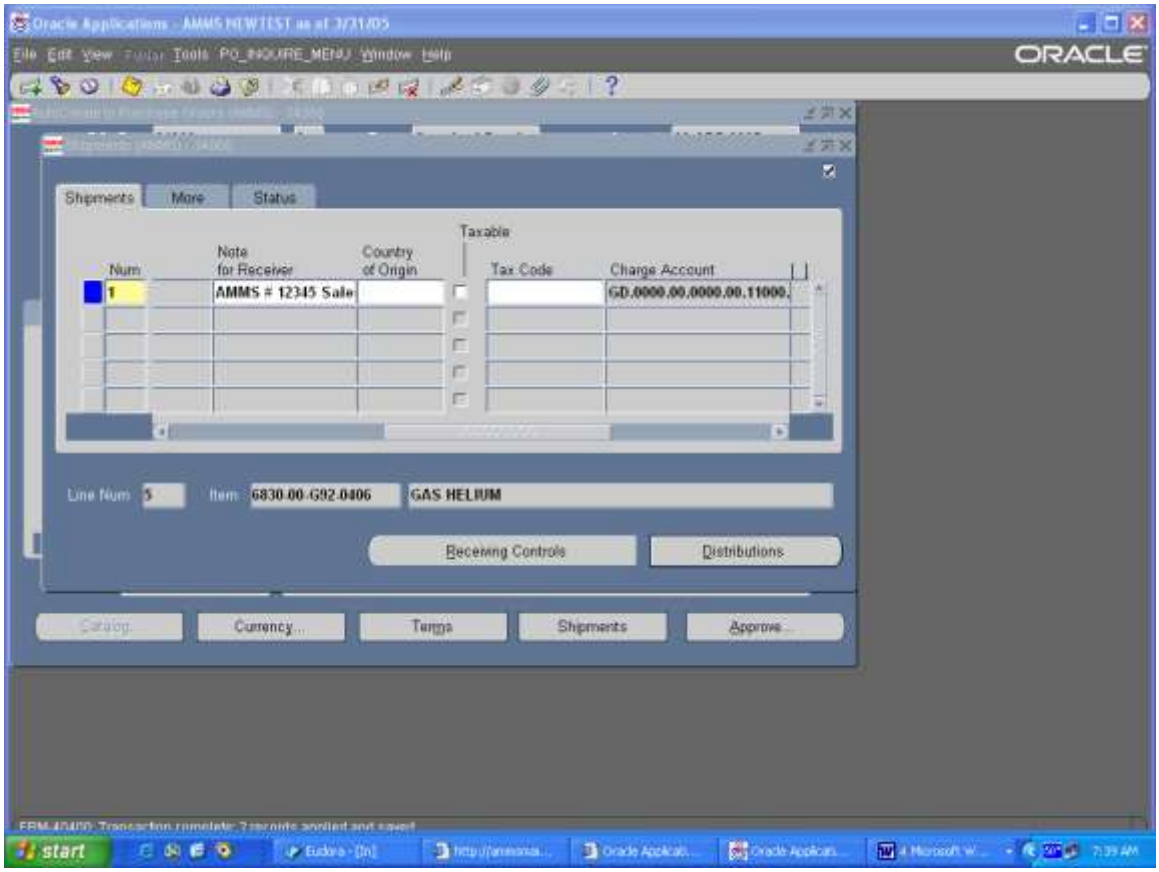
Step Description: At the Shipments window, scroll to the right until you see the Note to Receiver field, enter required information in this field.

Expected Results: Field will be populated



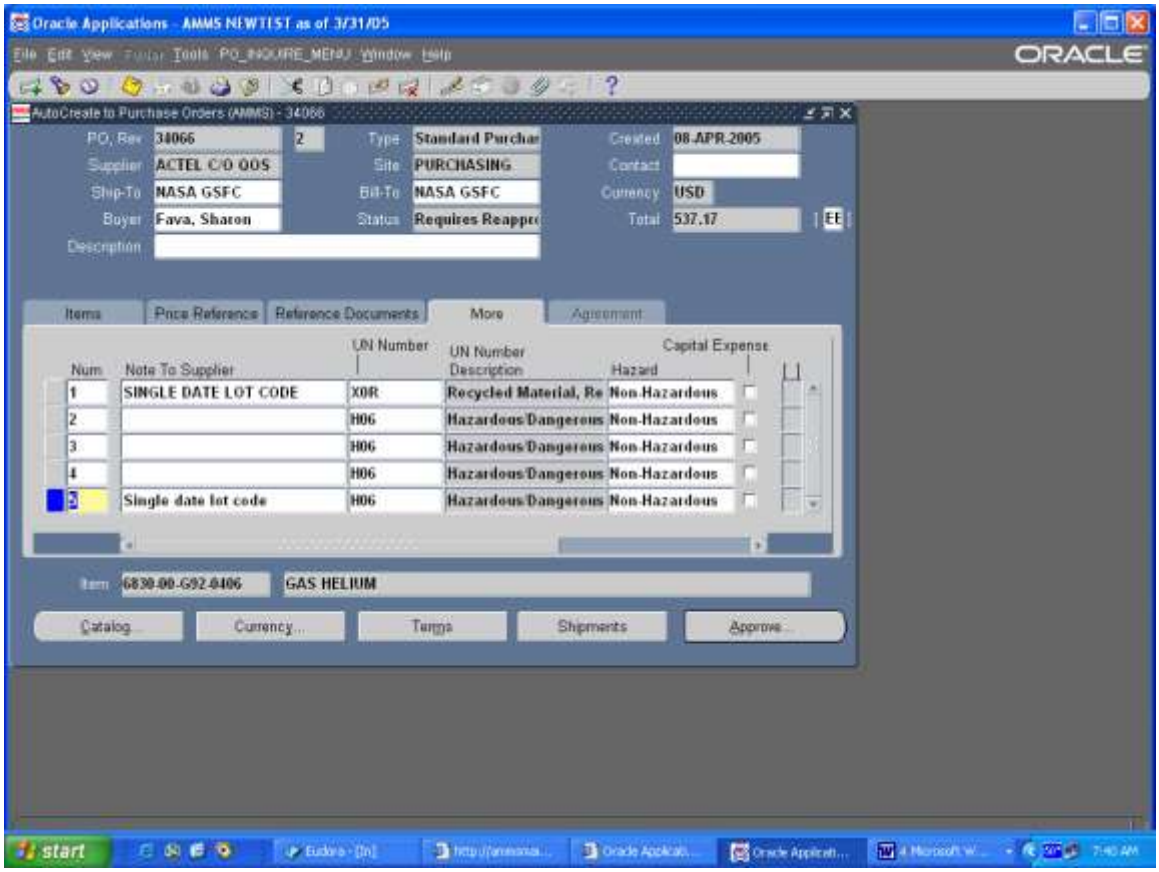
Step Description: Save your work

Expected Results: Transactions Saved and Applied



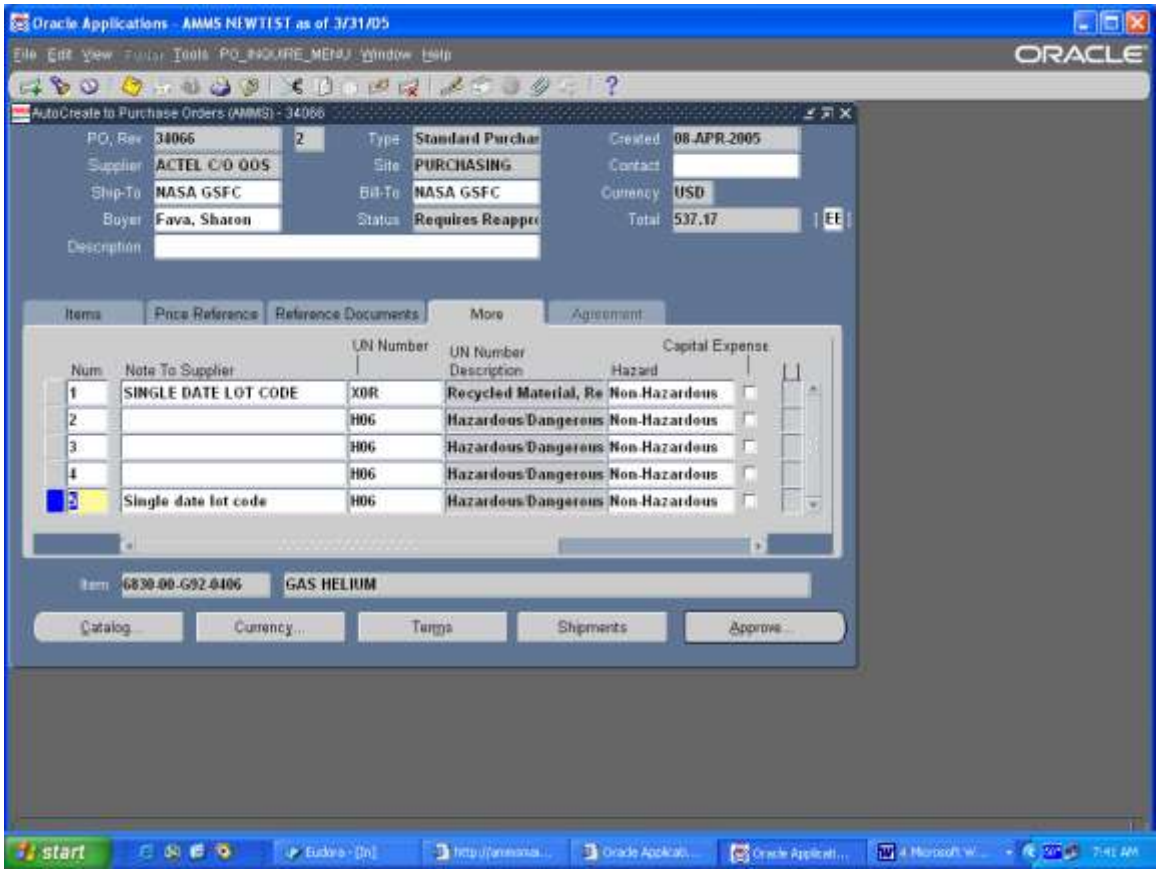
Step Description: Close the Shipments window

Expected Results: Return to the Autocreate to Purchase Order window



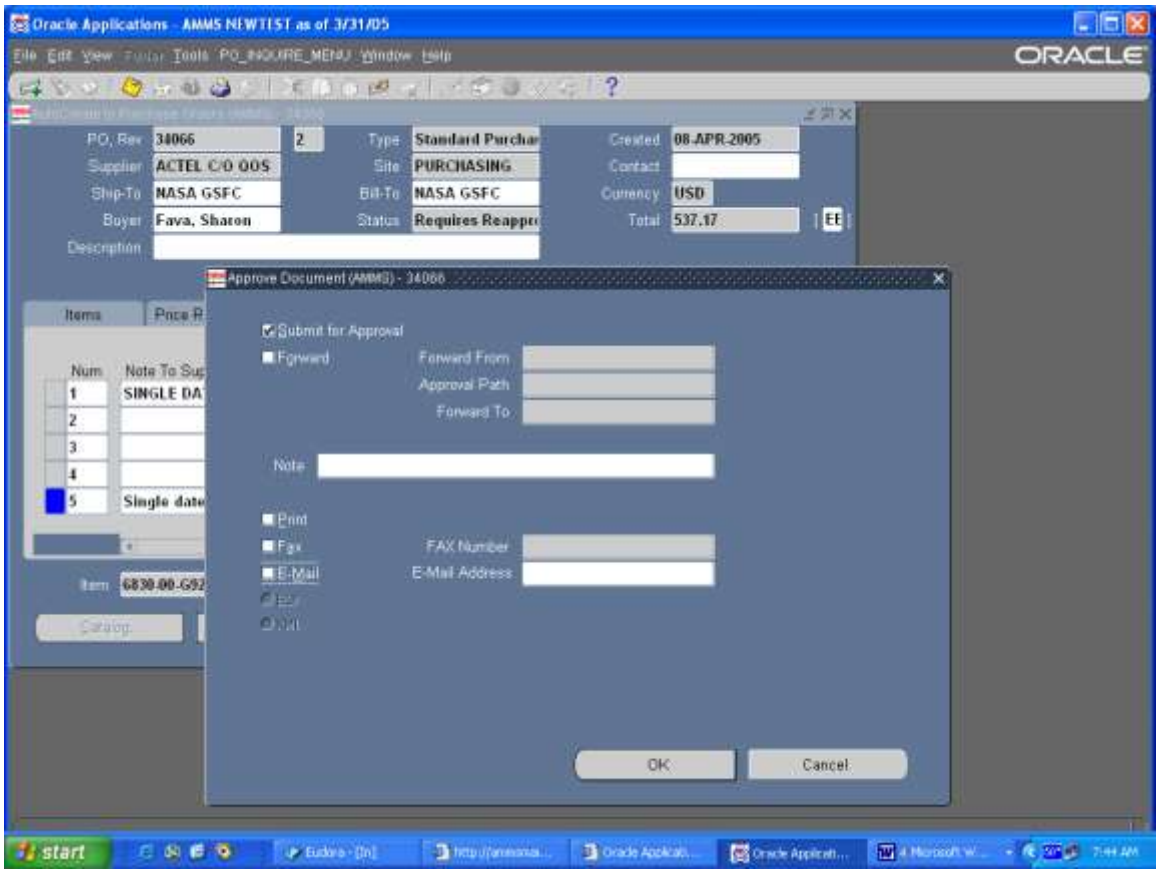
Step Description: Note that the Status says “Requires Re-Approval”, you now need to Approve the Purchase Order. Click on the Approve Button

Expected Results: Approval document window will appear



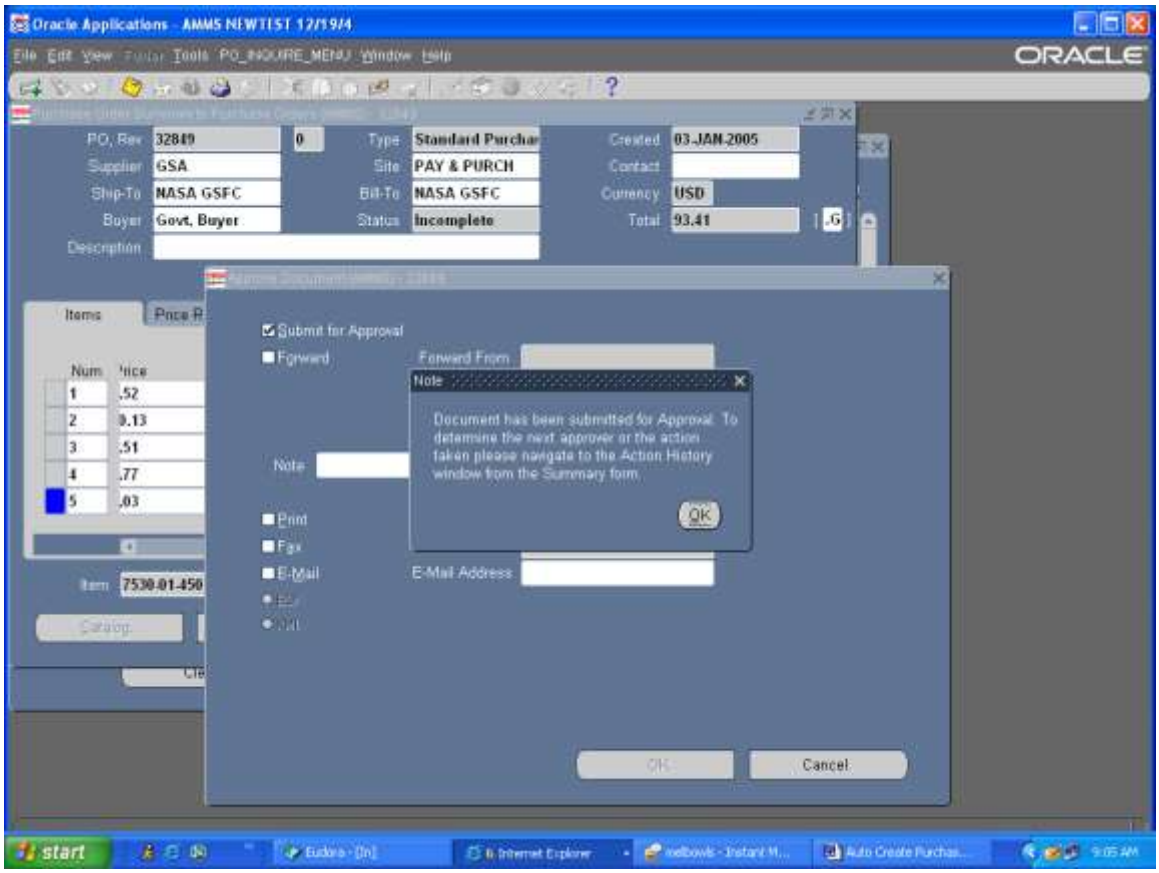
Step Description: At the Approval Documents window, make sure the Submit for Approval button is checked, remove the check mark from the Email field, click on the Ok Button

Expected Results: Note window will appear

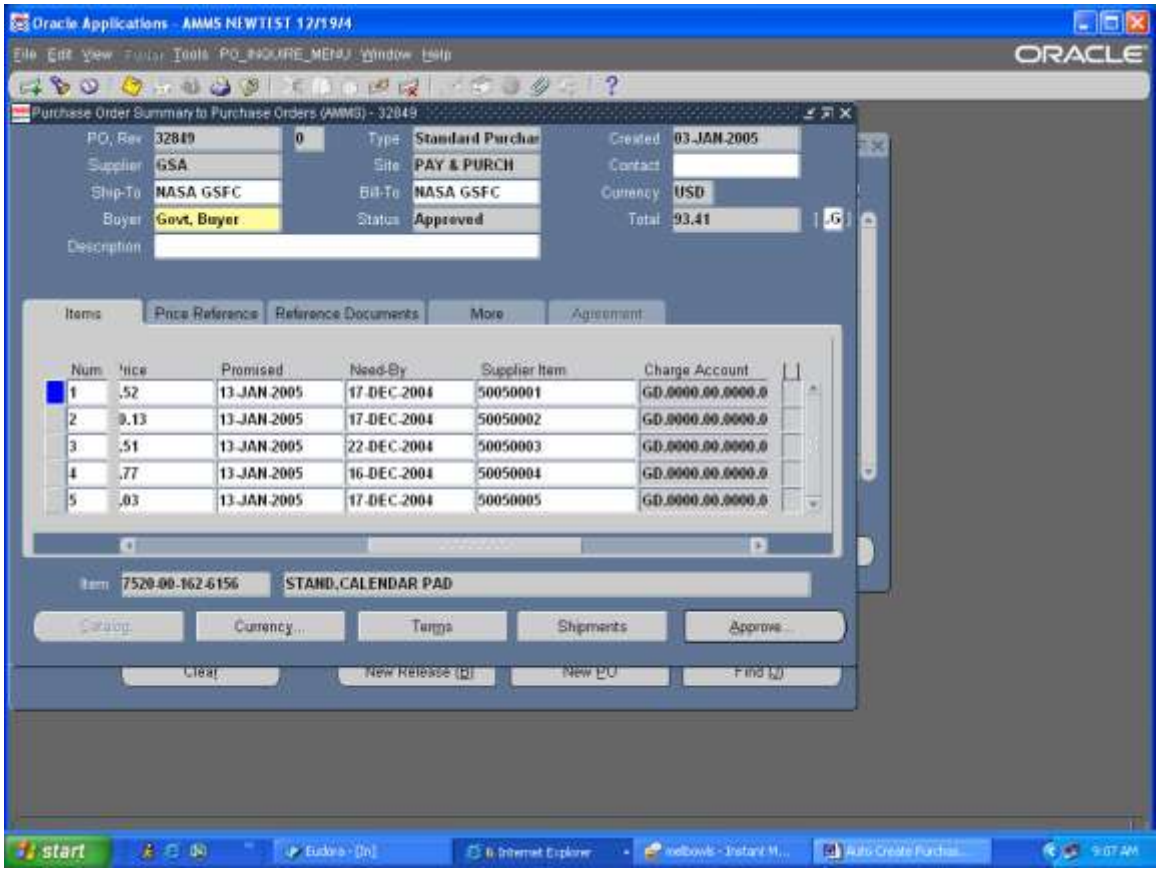


Step Description: The Note window tells you that the “document has been submitted for approval” click OK to the Note window.

Expected Results: You will return to the Purchase Order Summary to Purchase Order window



Step Description: Take note that the Status on the PO is now Approved.



You are complete. You have added a requisition to an existing purchase order.

AMMS TRAINING SCRIPT
Cancel Purchase Order Line

Purpose

The purpose of this training script is to show how to cancel a purchase order libe and the associated requisitions.

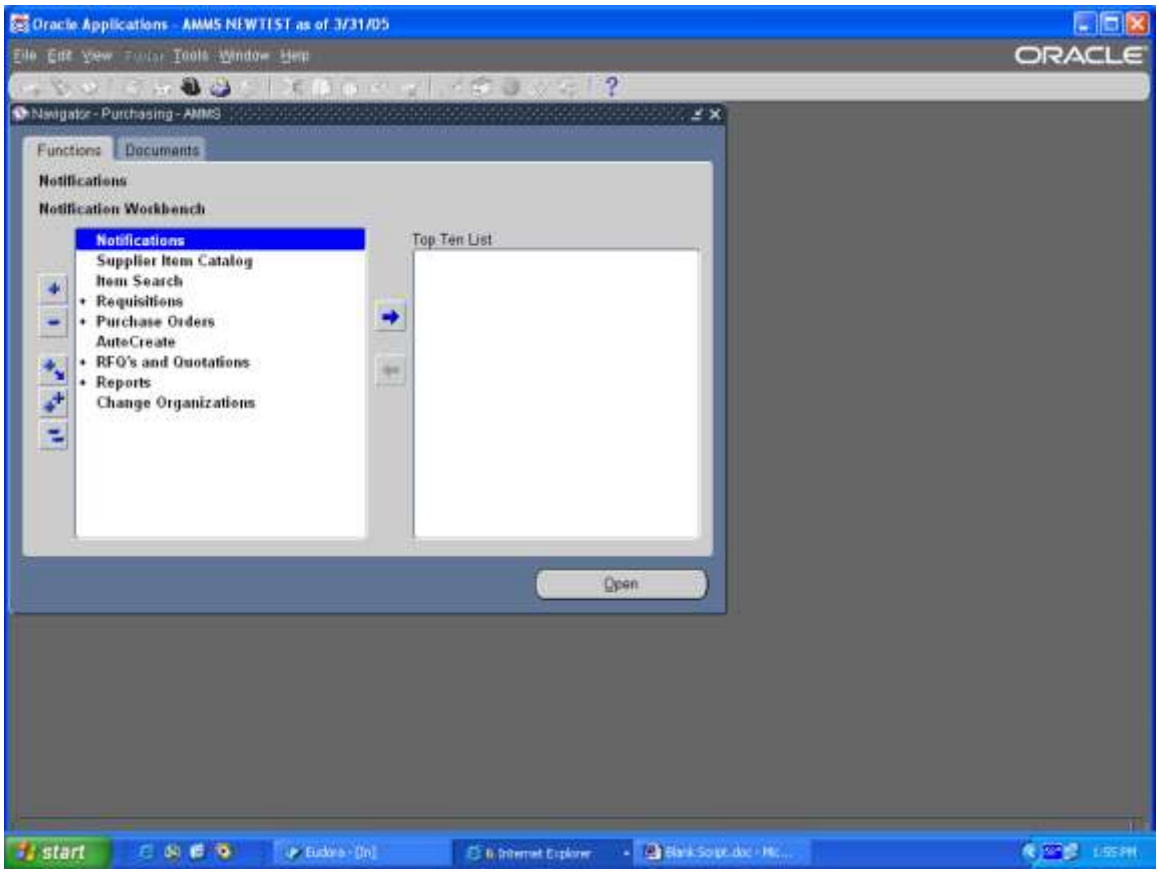
Audience

Buyers, Material Coordinators

Prepared By	Theresa Coulson
Creation Date:	08/05/2005
Document Name	Cancel PO Shipment Line.doc
Version	4
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Purchasing.	

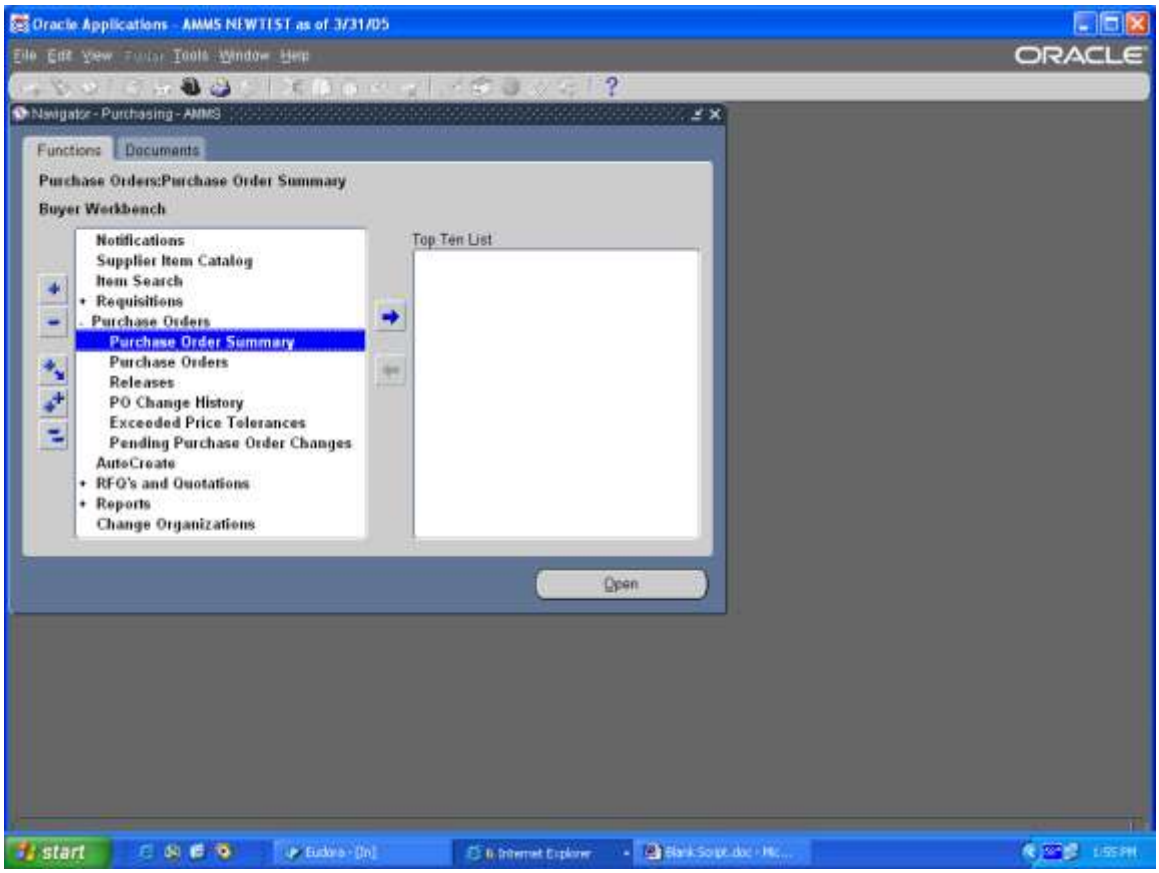
Step Description: Sign onto Oracle and select the Purchasing AMMS responsibility.

Expected Results: Purchasing AMMS main menu will appear



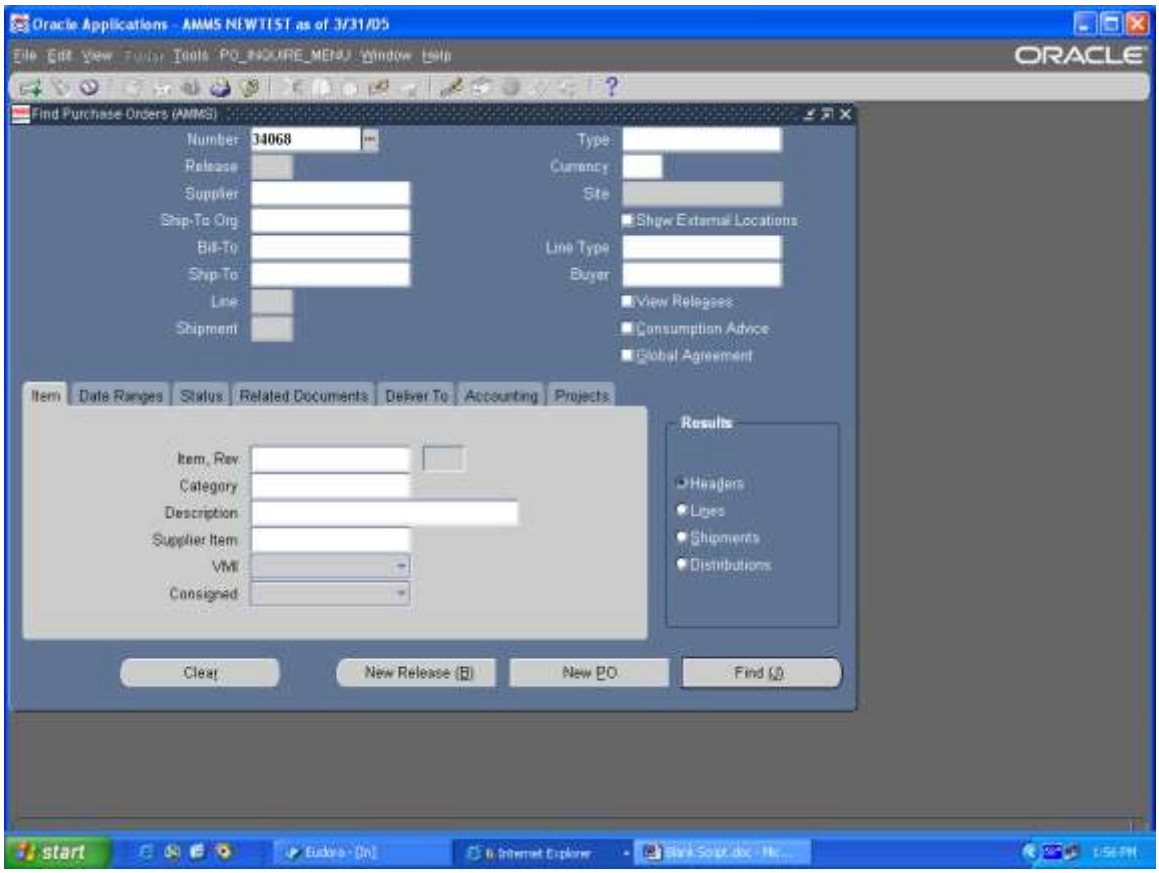
Step Description: From the Purchasing AMMS main menu select Purchase Order > Purchase Order Summary, click on Open

Expected Results: Find Purchase Order window will appear



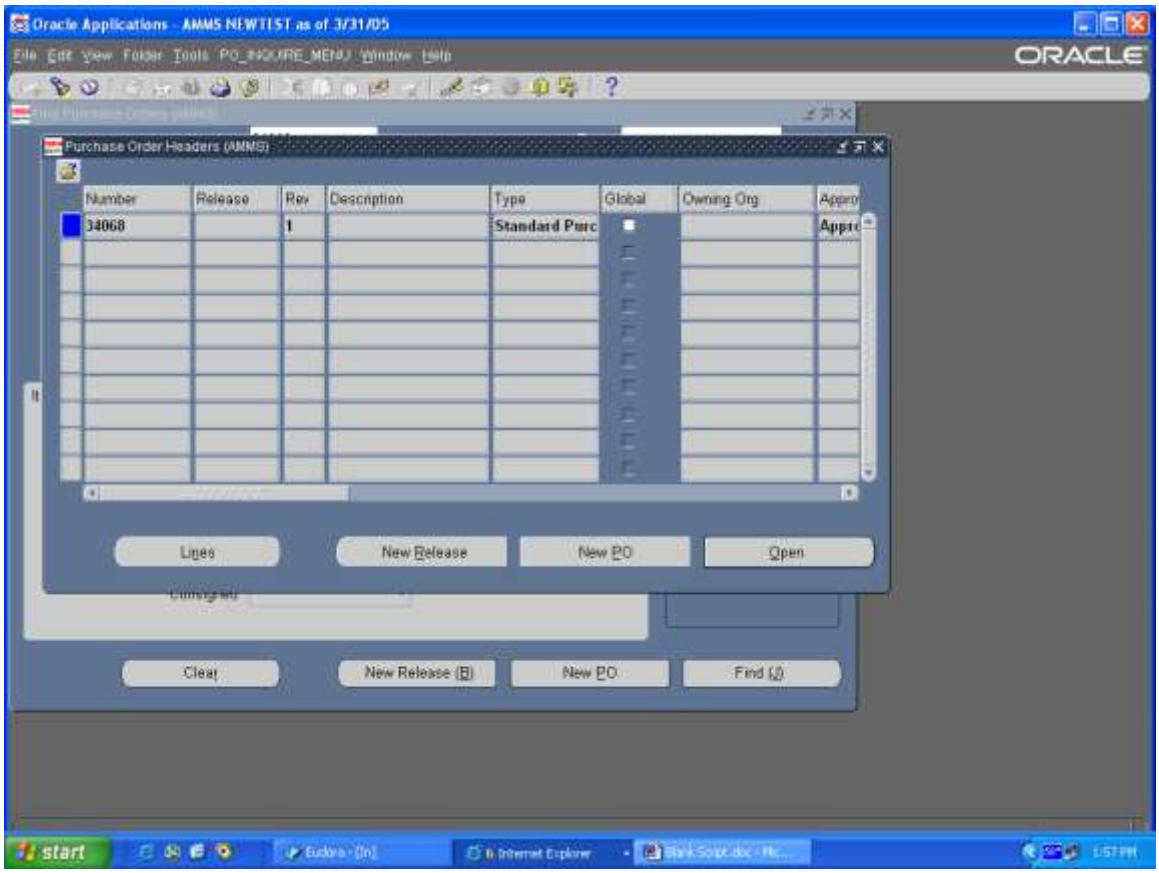
Step Description: In the Number field enter the Purchase Order number, click on the Find button

Expected Results: Purchase Order Header window will appear



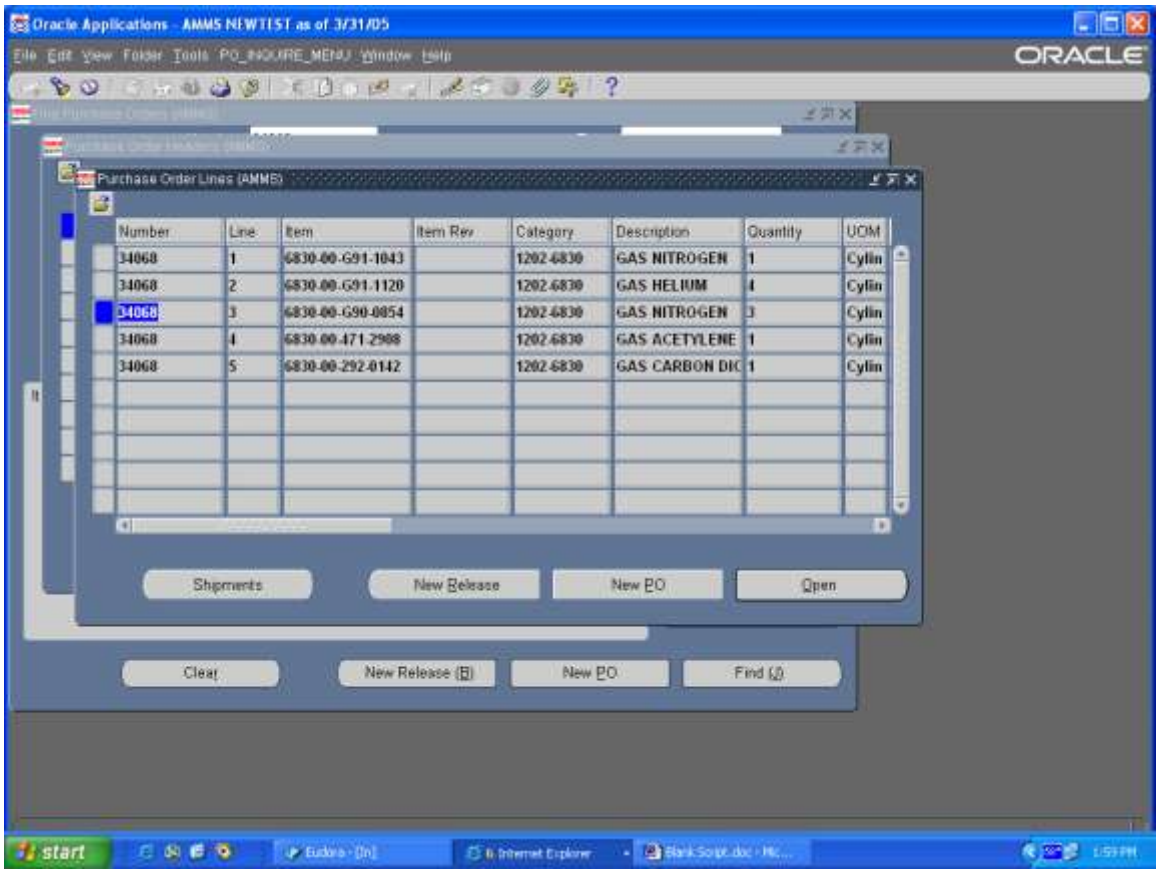
Step Description: At the Purchase Order Header window click on the Lines button

Expected Results: Purchase Order Lines window will appear



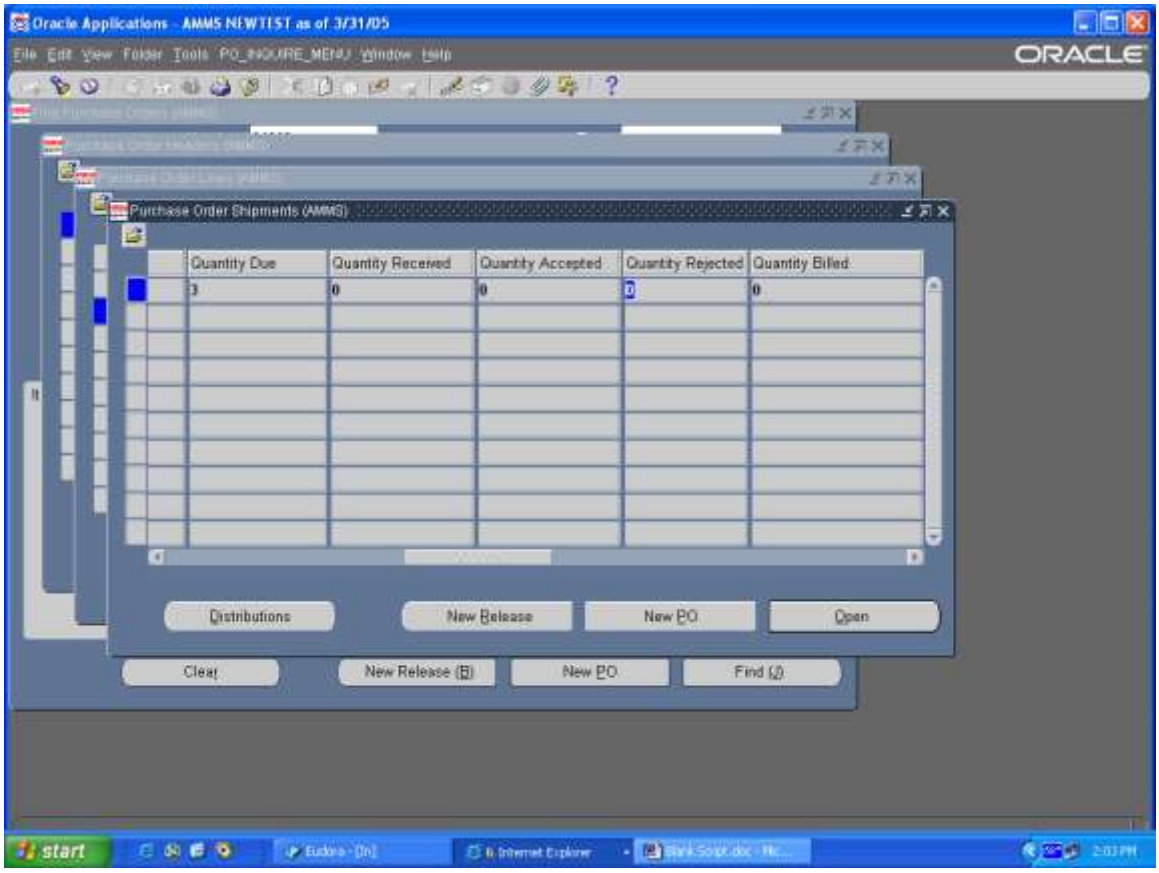
Step Description: Select the line that you want to cancel by placing the blue box at the beginning of the line, then click on the Shipments button

Expected Results: Purchase Order Shipments window will appear



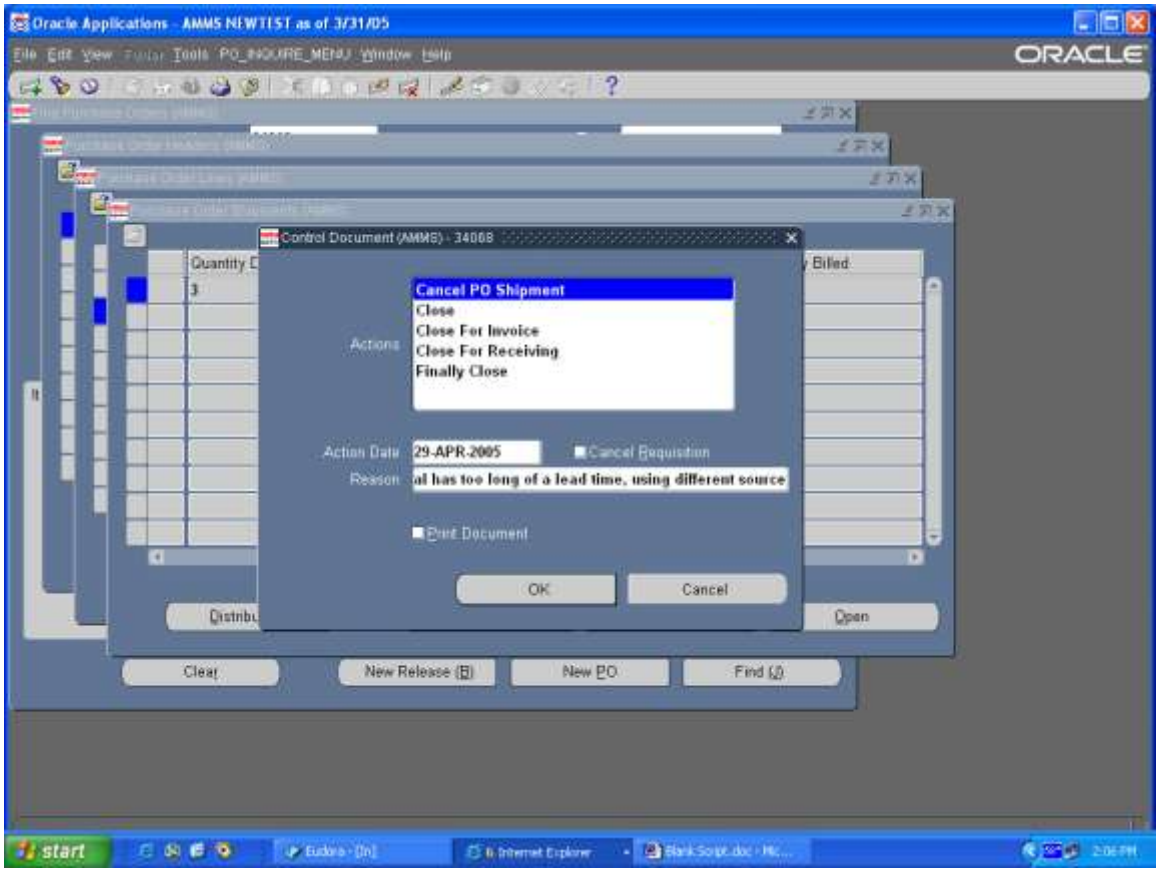
Step Description: Use the scroll bar move to the right, make sure there is still a quantity due for the material, make sure that the shipment line has not been billed **(if the qty due field is zero you can not cancel the line, if the qty billed field greater then zero you can not cancel the shipment line)** if everything looks to be fine from the tool bar select Control

Expected Results: Control Documents window will appear



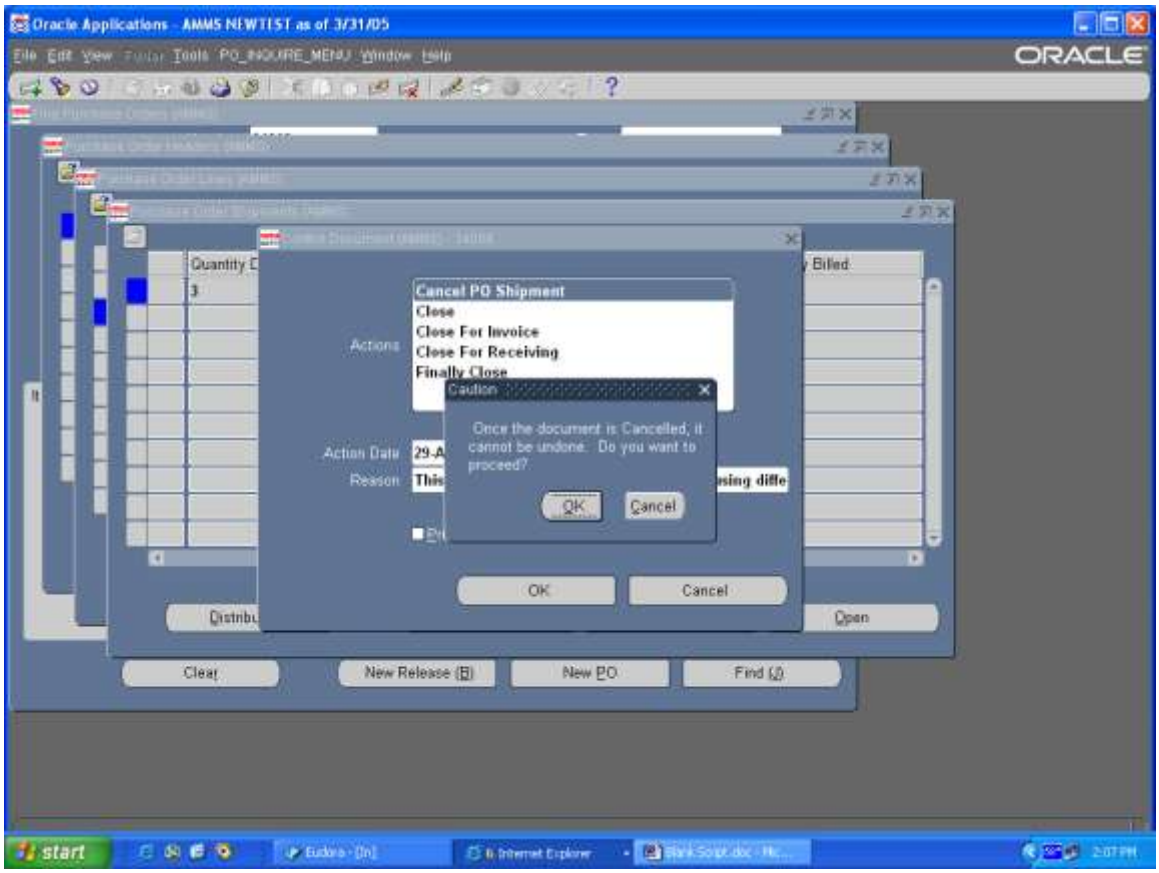
Step Description: From the Control Documents window, make sure the Cancel PO Shipment action is blue, <u>place a check mark in the Cancel Requisition box; this will also cancel the requisition.</u> In the Reason field enter a brief description as to why you are canceling this PO Shipment Line. Click Ok

Expected Results: Caution window will appear



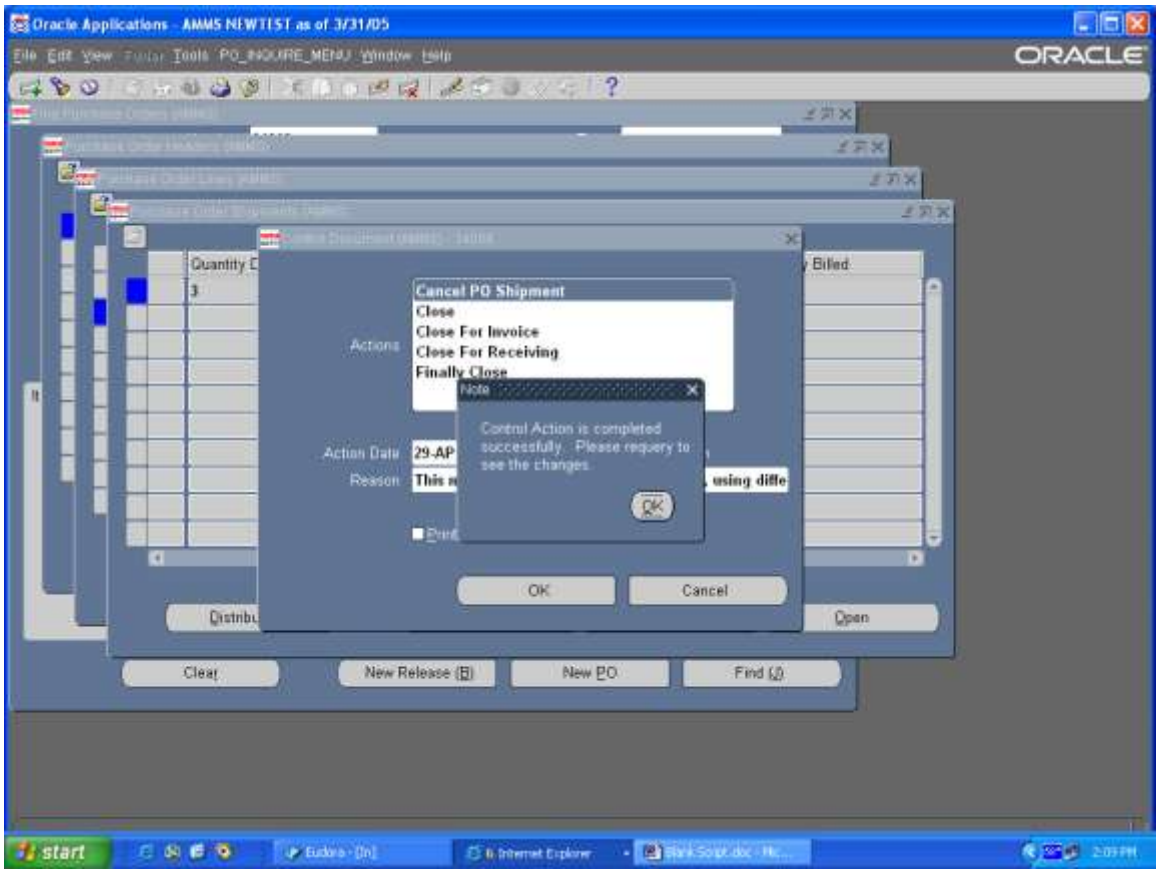
Step Description: Click OK to the Caution window, “Once this document is Cancelled, it can not be undone. Do you want to proceed?”

Expected Results: Note window will appear



Step Description: Click OK to the Note window, “Control Action is completed successfully, Please re-query to see changes”

Expected Results: Return to the Purchase Order Shipment window



You have completed the cancellation of the PO line. Close all forms.

AMMS TRAINING SCRIPT
Cancel Purchase Requisitions

Purpose

The purpose of this training script is to show how to cancel purchase requisitions

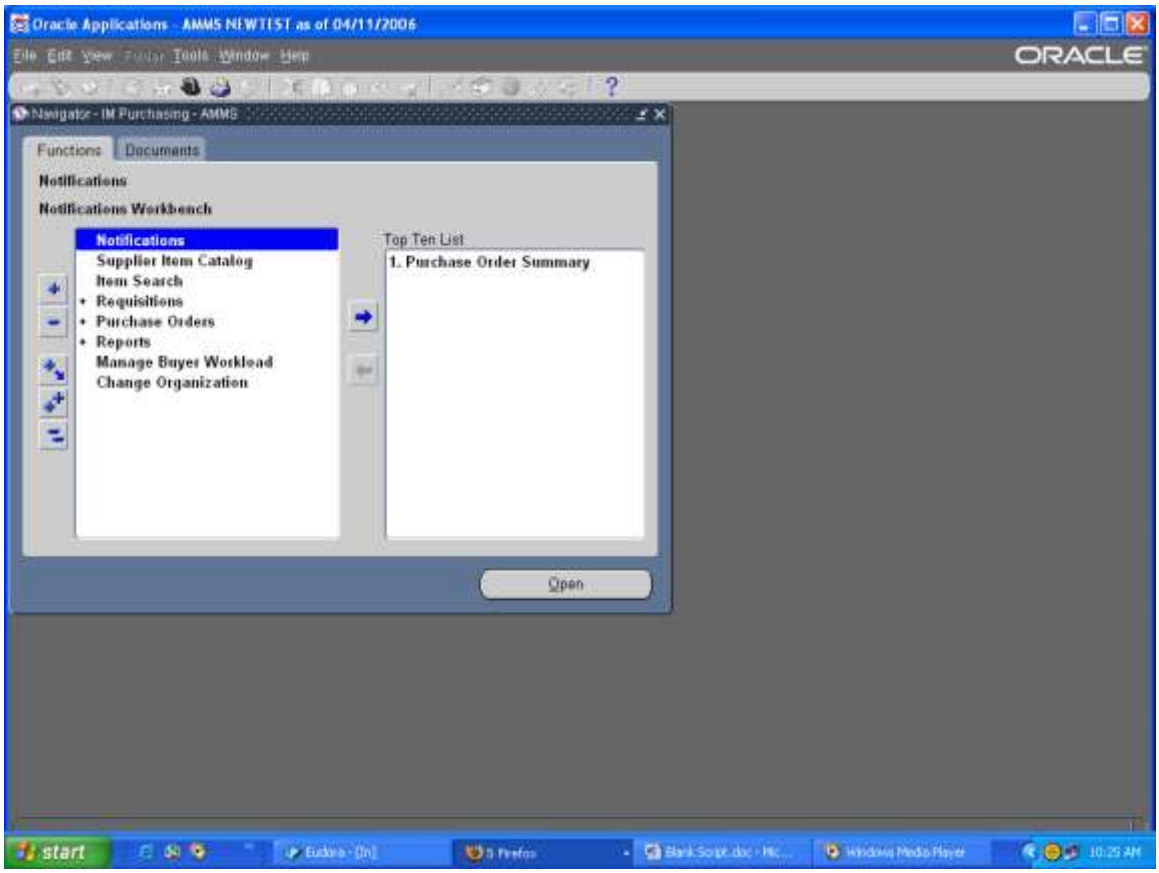
Audience

Material Coordinators, Team Leads

Prepared By	Theresa Coulson
Creation Date:	05/04/2006
Document Name	Cancel Requisition.doc
Version	x
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Purchasing.	

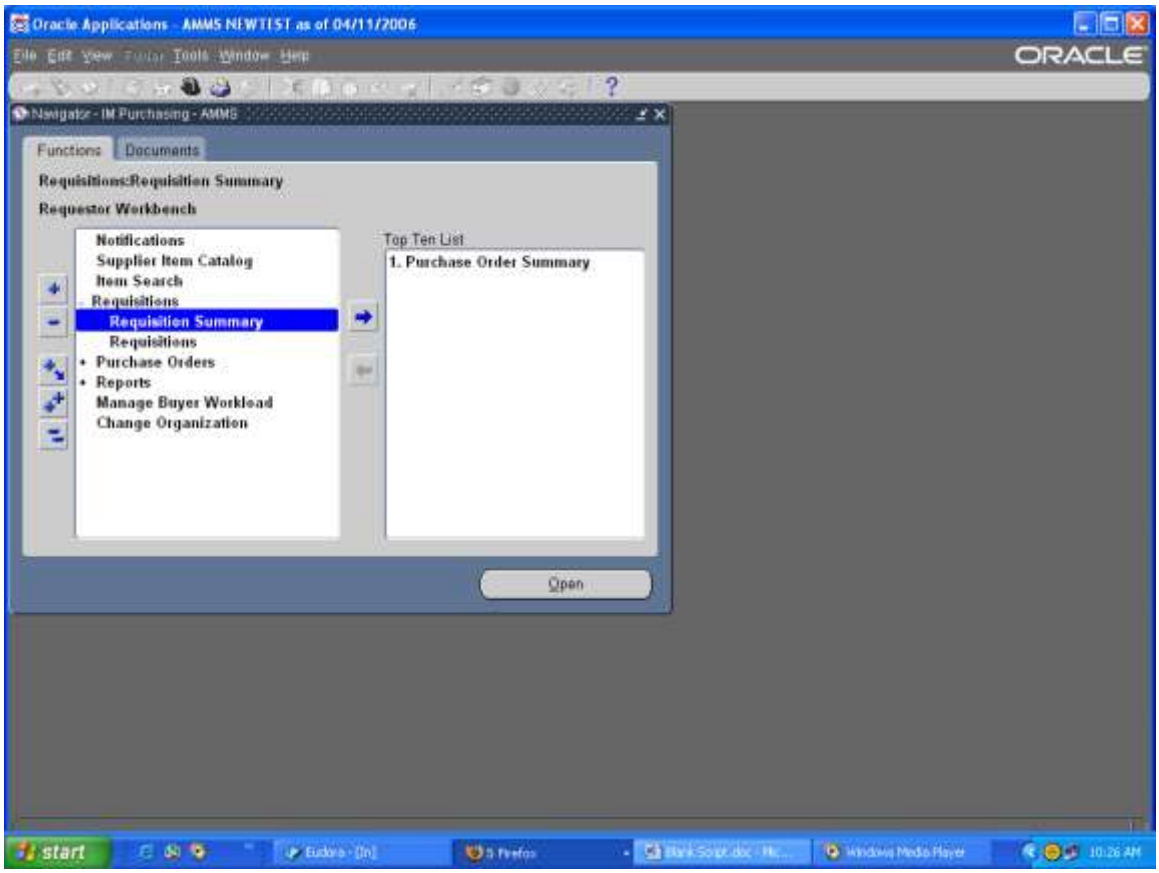
Step Description: Sign onto Oracle and select IM Purchasing AMMS responsibility

Expected Results: IM Purchasing AMMS main menu will appear



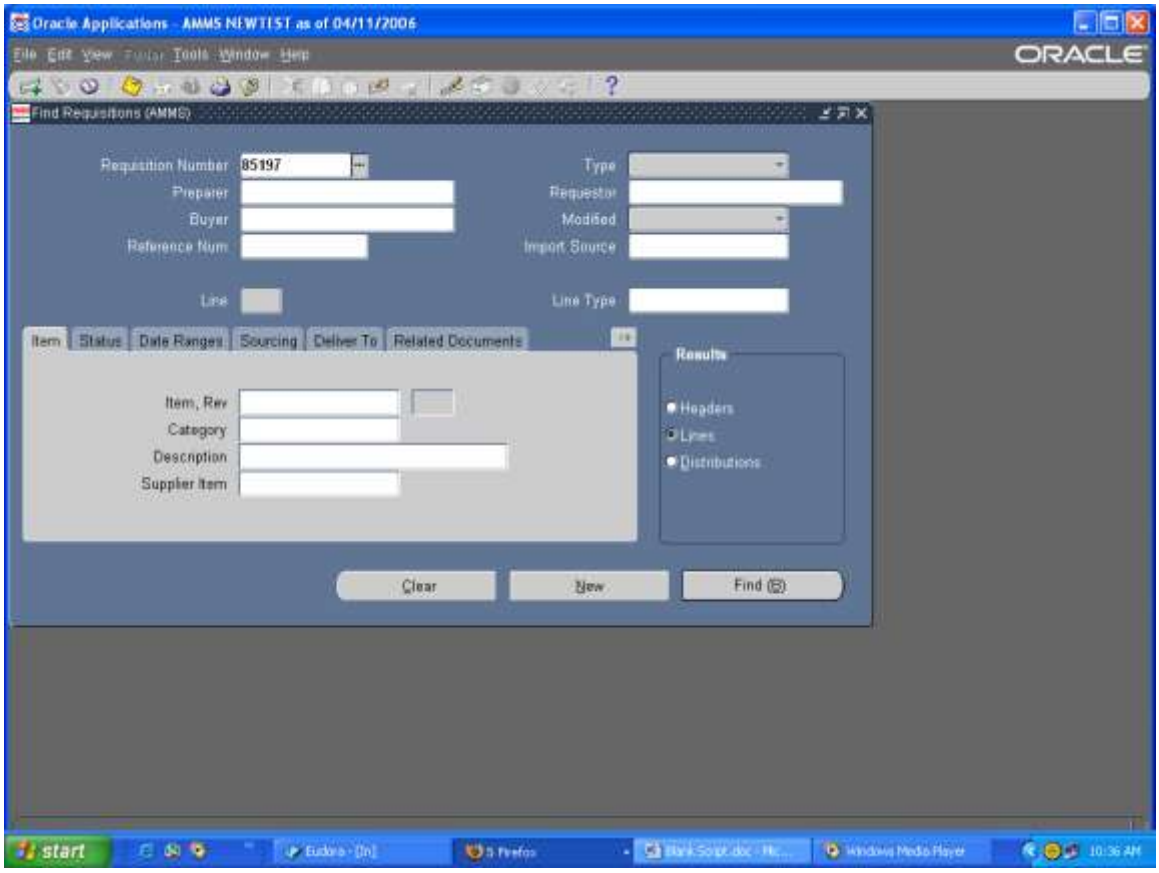
Step Description: From the IM Purchasing AMMS main menu select Requisitions > Requisition Summary, click on the open button

Expected Results: Find Requisitions window will appear



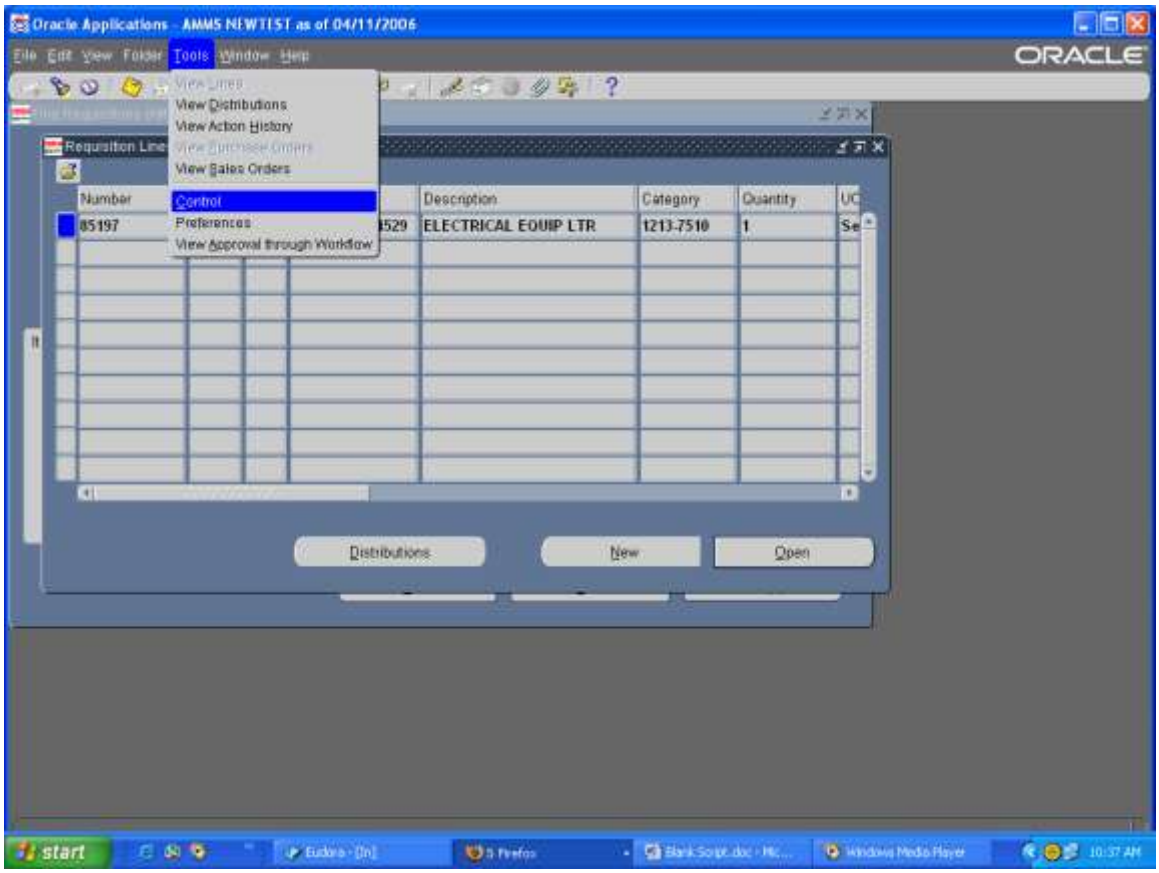
Step Description: You can either enter the requisition number or the item number. Enter the requisition number in the Requisition Number field, or the item in the Item,Rev field. At the results area, select Lines. Click on the find button

Expected Results: Requisition Lines Summary window will appear



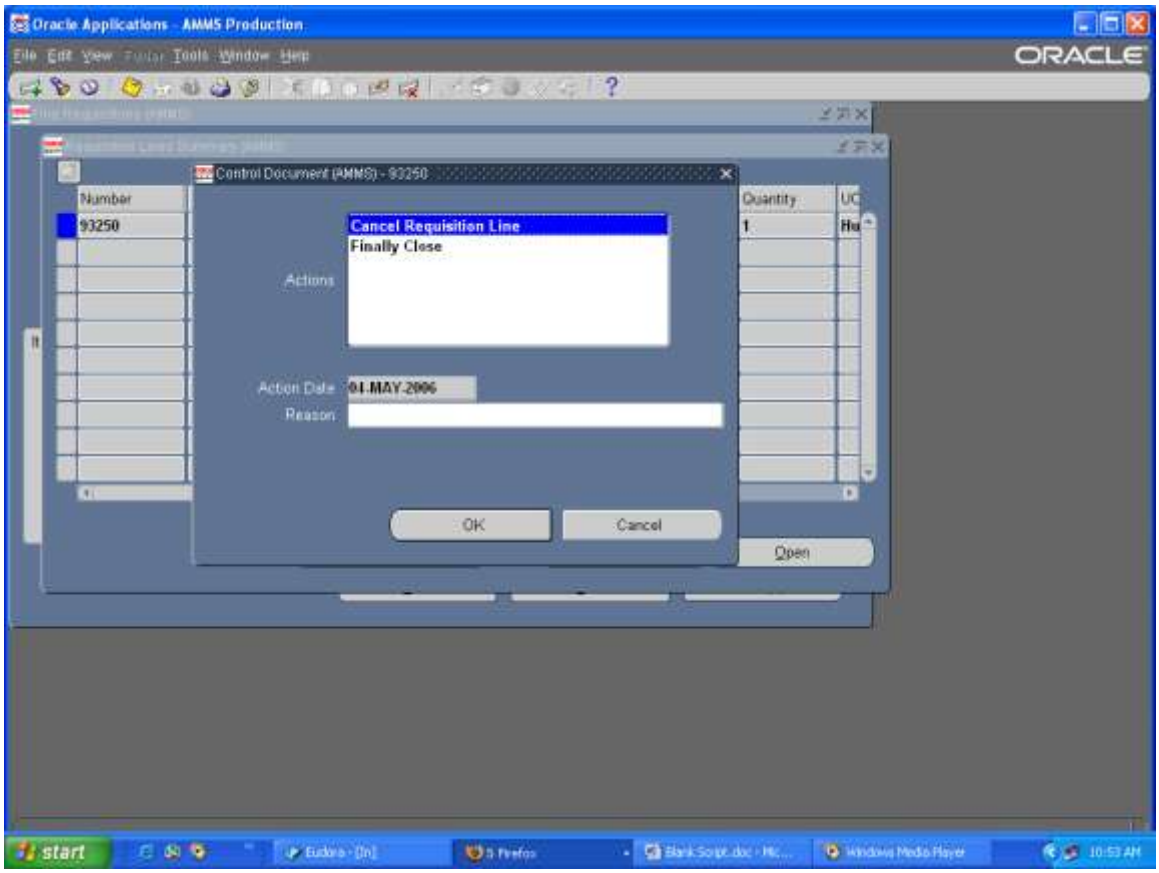
Step Description: From the tool bar select Tools > Control

Expected Results: Control Document window will appear



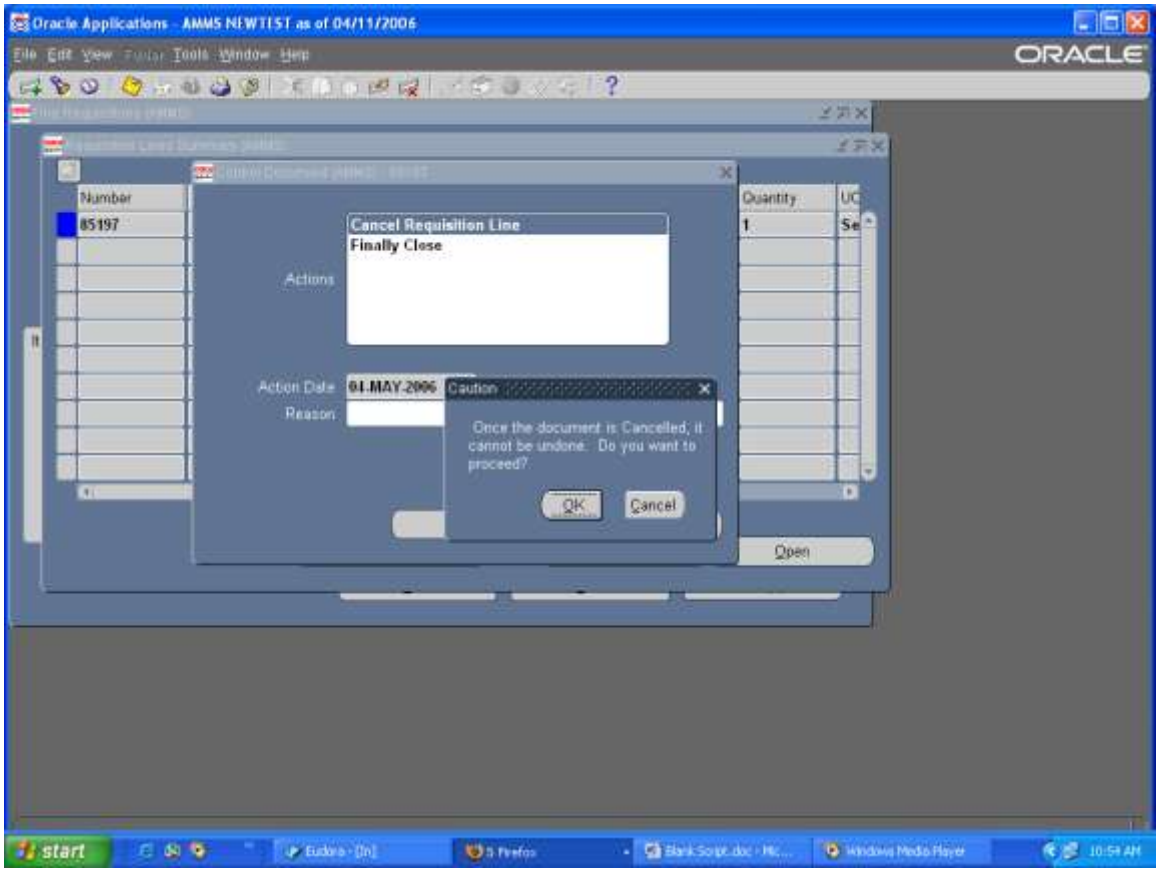
Step Description: At the Control Document window select Cancel Requisition Line, click OK

Expected Results: Caution window will appear



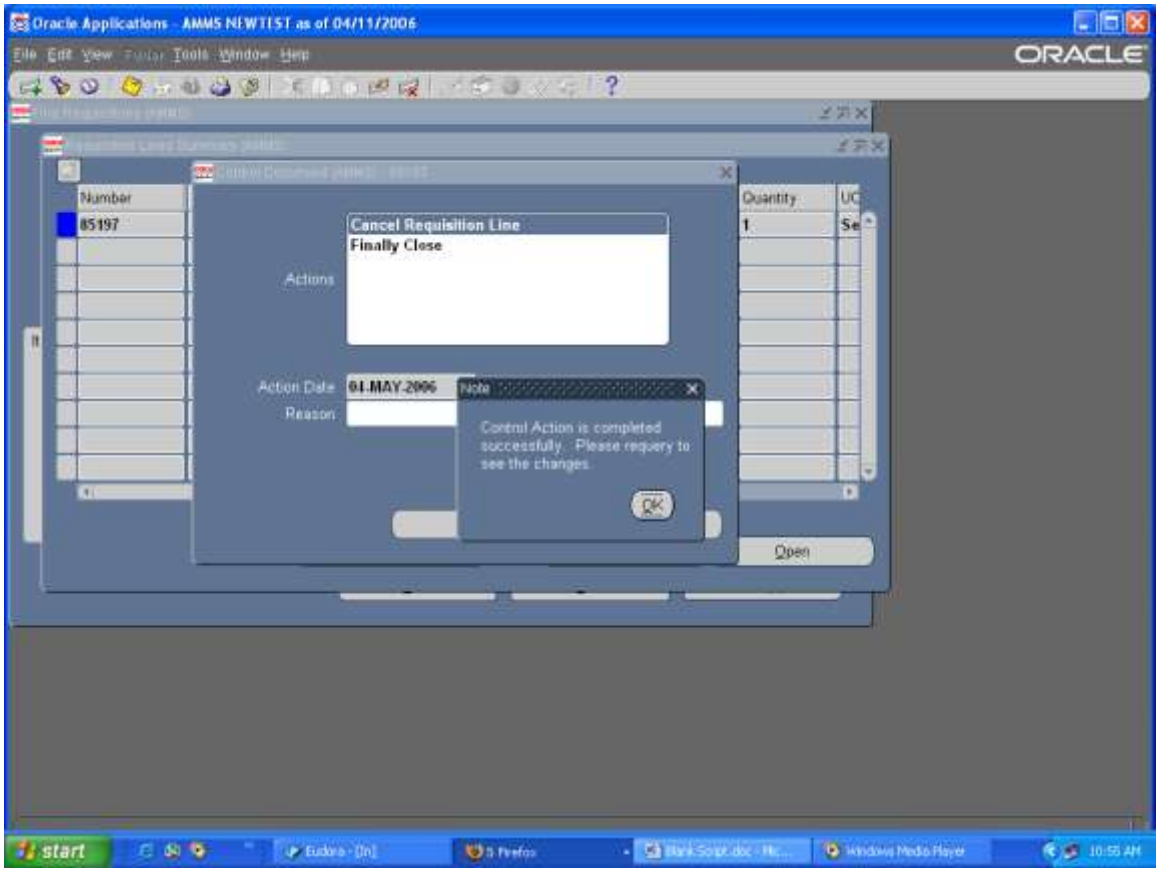
Step Description: Click OK to the Caution window

Expected Results: Note window will appear



Step Description: Click OK to Note window

Expected Results: Return to Requisition Lines Summary window



Cancellation of Requisitions is completed.

AMMS TRAINING SCRIPT
Create Blanket Purchase Order

Purpose

The purpose of this training script is to show how to create a Blanket Purchase Agreement.

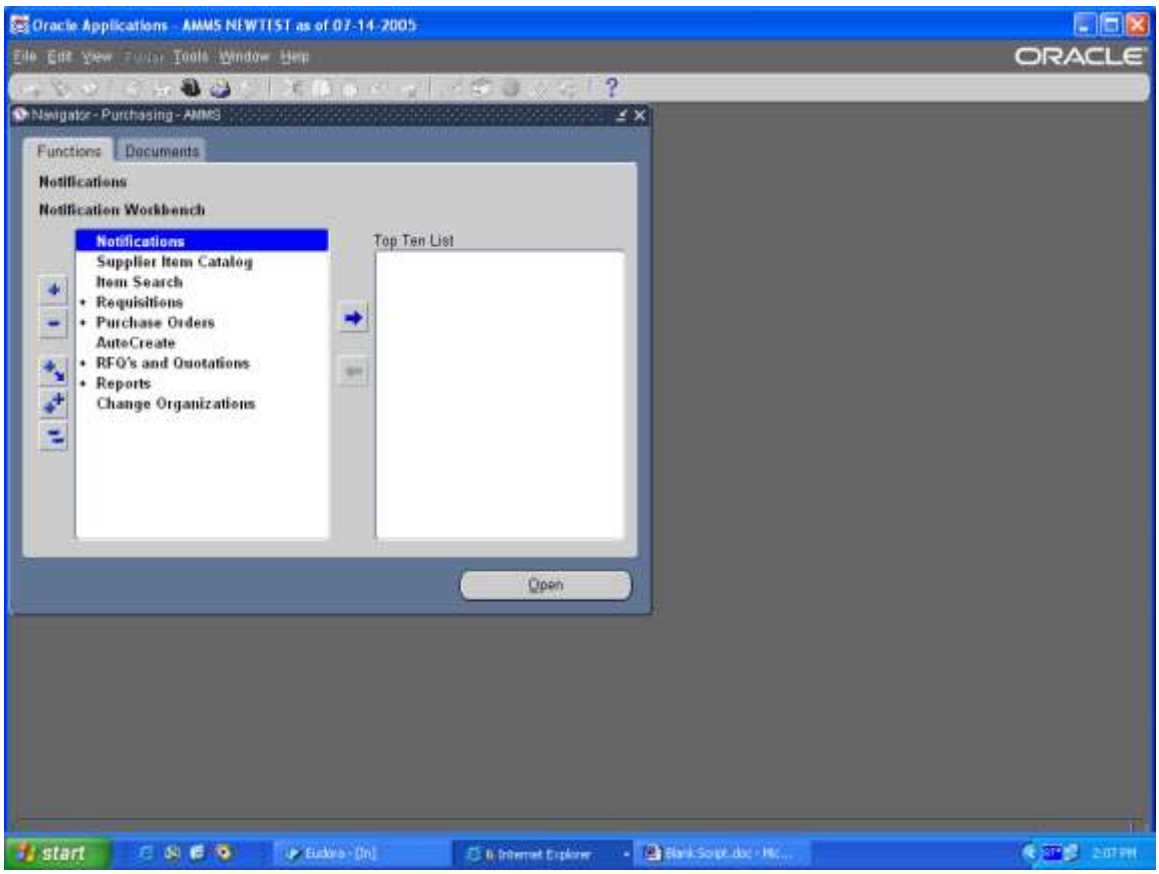
Audience

Buyers

Prepared By	Theresa Coulson
Creation Date:	03/28/2005
Document Name	Create Blanket Purchase Agreement.doc
Version	3
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Purchasing.	

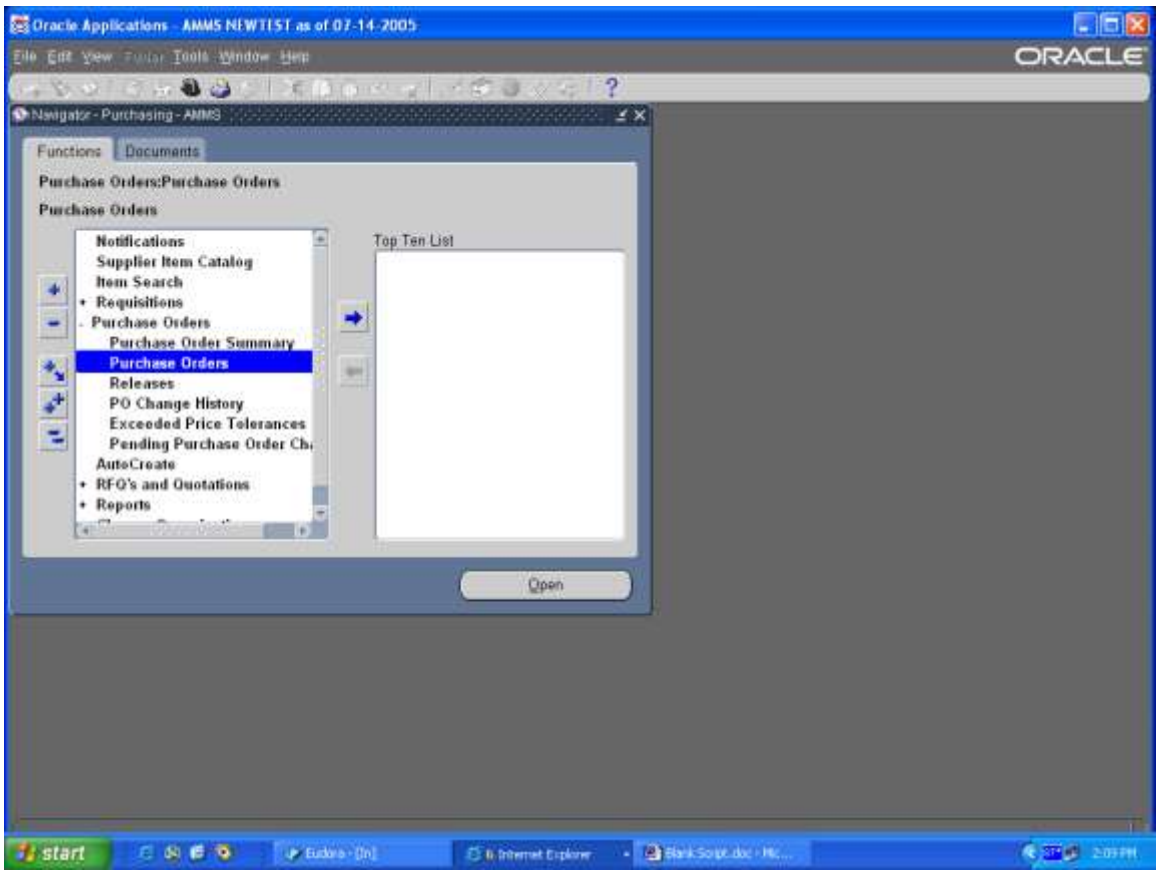
Step Description: Sign onto Oracle and select the Purchasing AMMS Responsibility

Expected Results: Purchasing AMMS main menu will appear



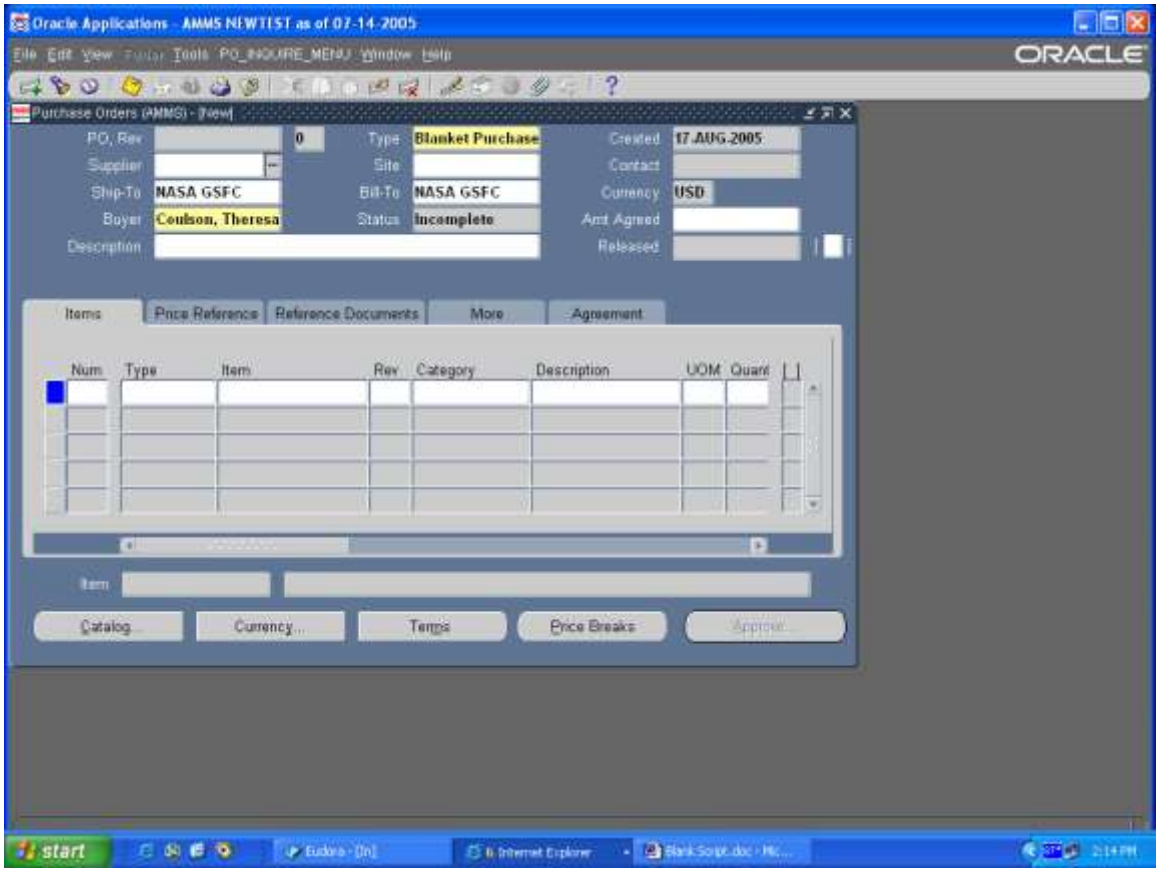
Step Description: From the Purchasing AMMS main menu select Purchase Orders > Purchase Orders click on the open button

Expected Results: Blank Purchase Order screen will appear



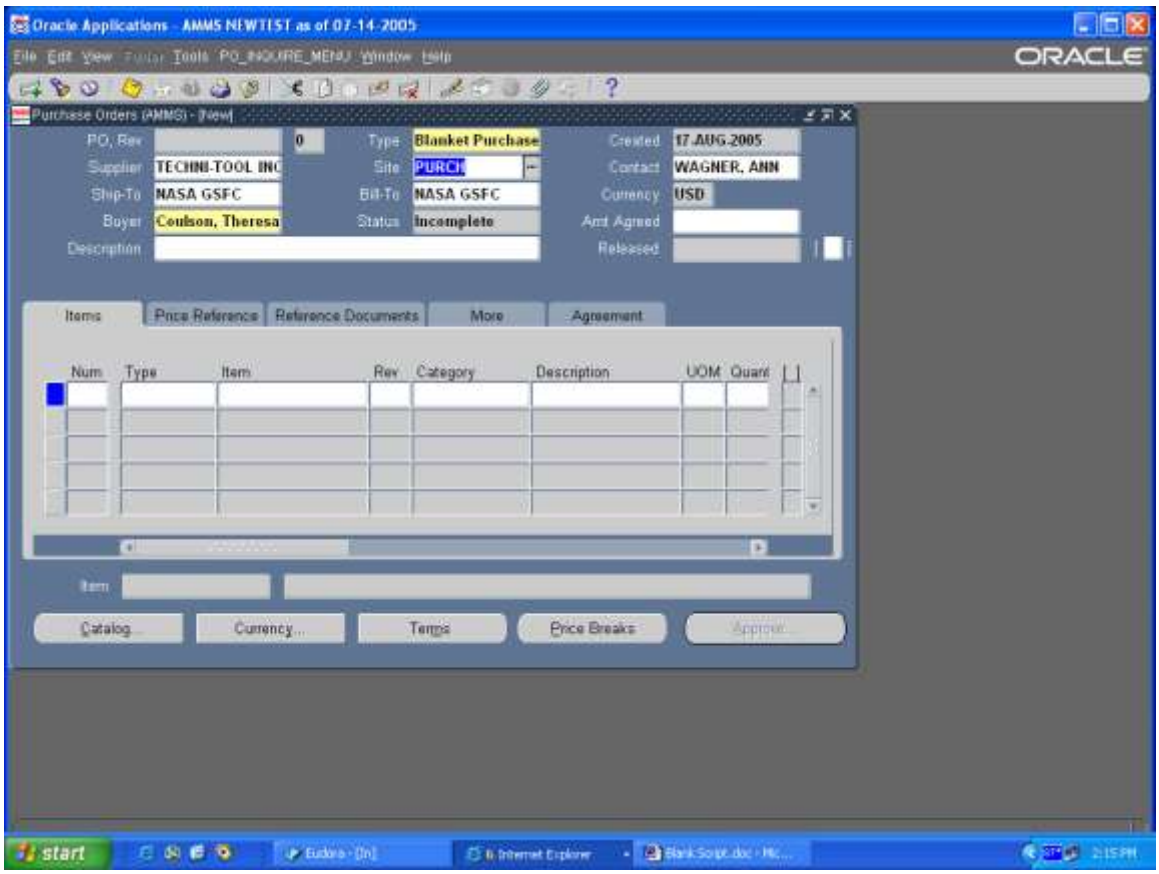
Step Description: At the blank purchase order window, in the Type field change this to Blanket Purchase Agreement

Expected Results: Field will be populated with Blanket Purchase Agreement



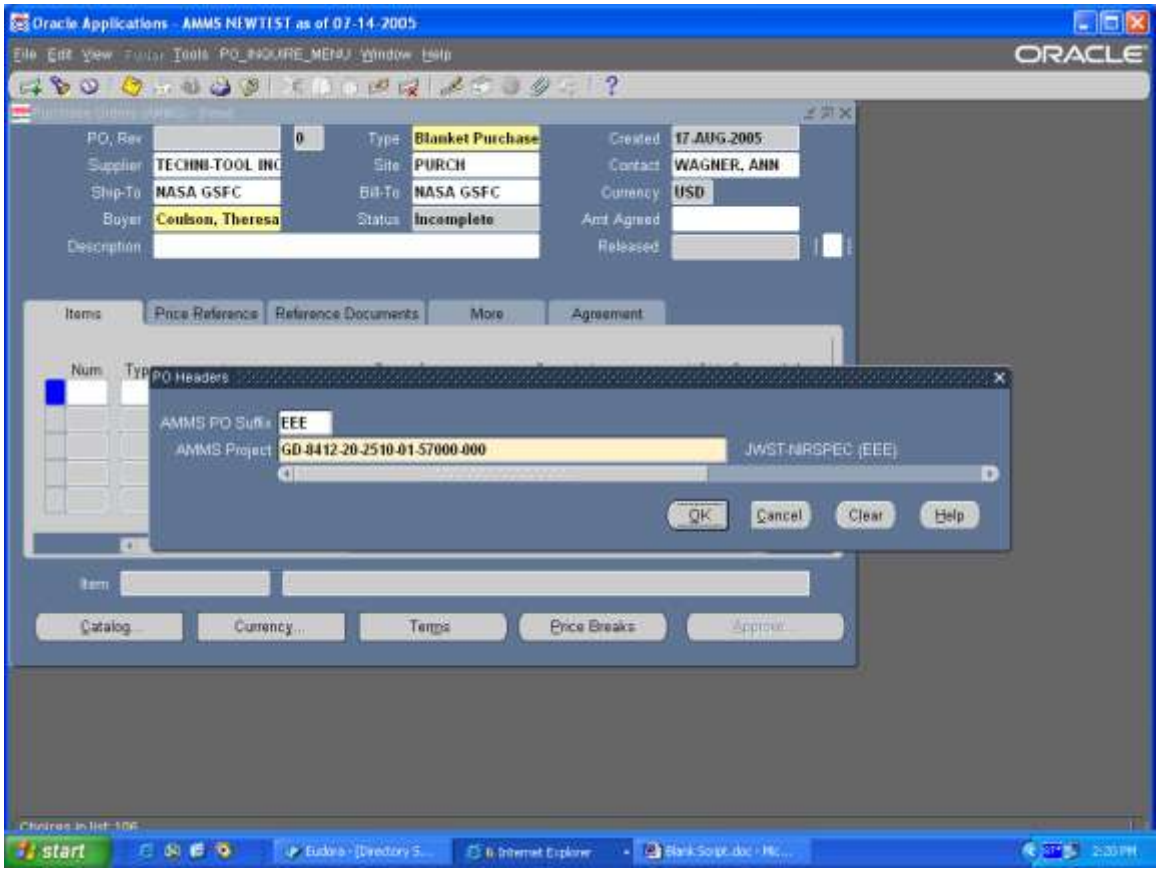
Step Description: In the Supplier field either, enter the supplier name or click on the LOV and select the supplier for this BPA.

Expected Results: Supplier field will be populated



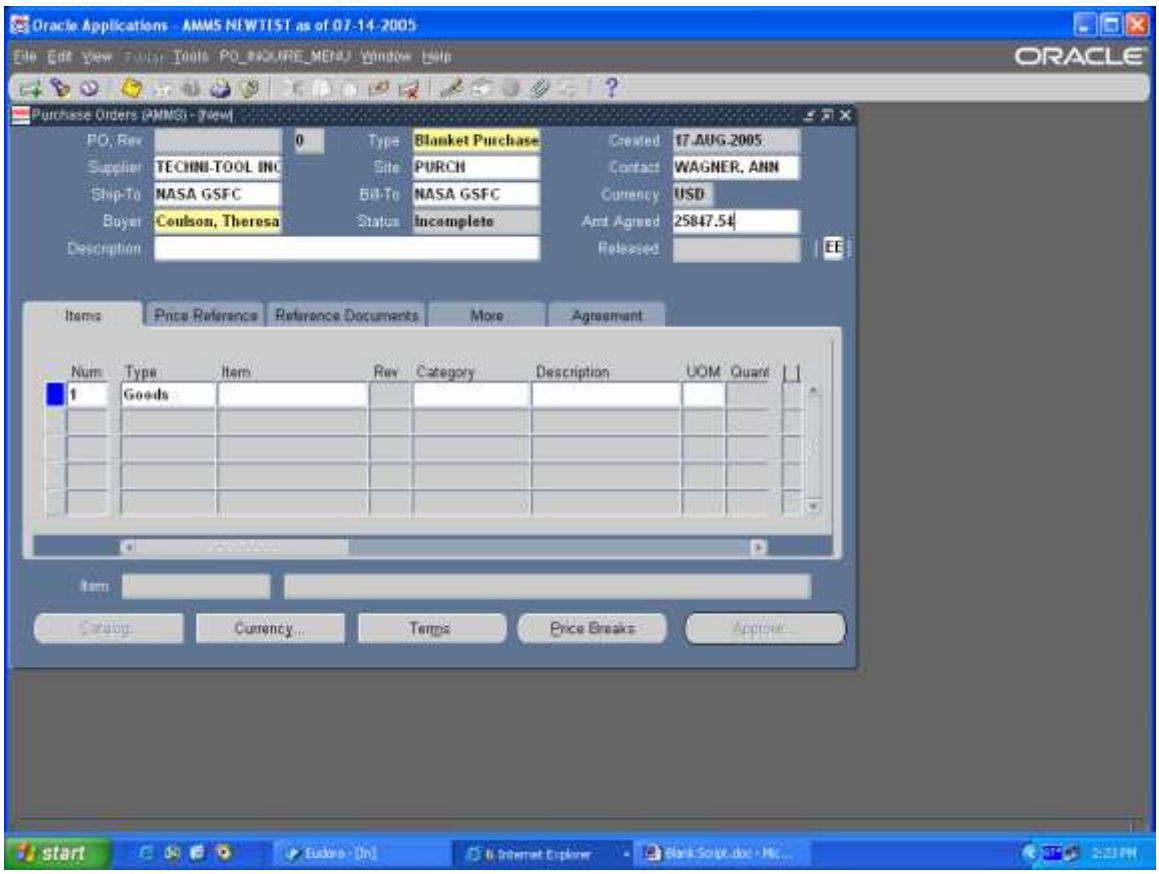
Step Description: Click in the [ ] this will open the PO Headers Descriptive Flex Field. In the Descriptive Flex Field enter the GL account number for the BPA and any suffix for the BPA, click Ok

Expected Results: Field will be populated, return to Purchase Order window



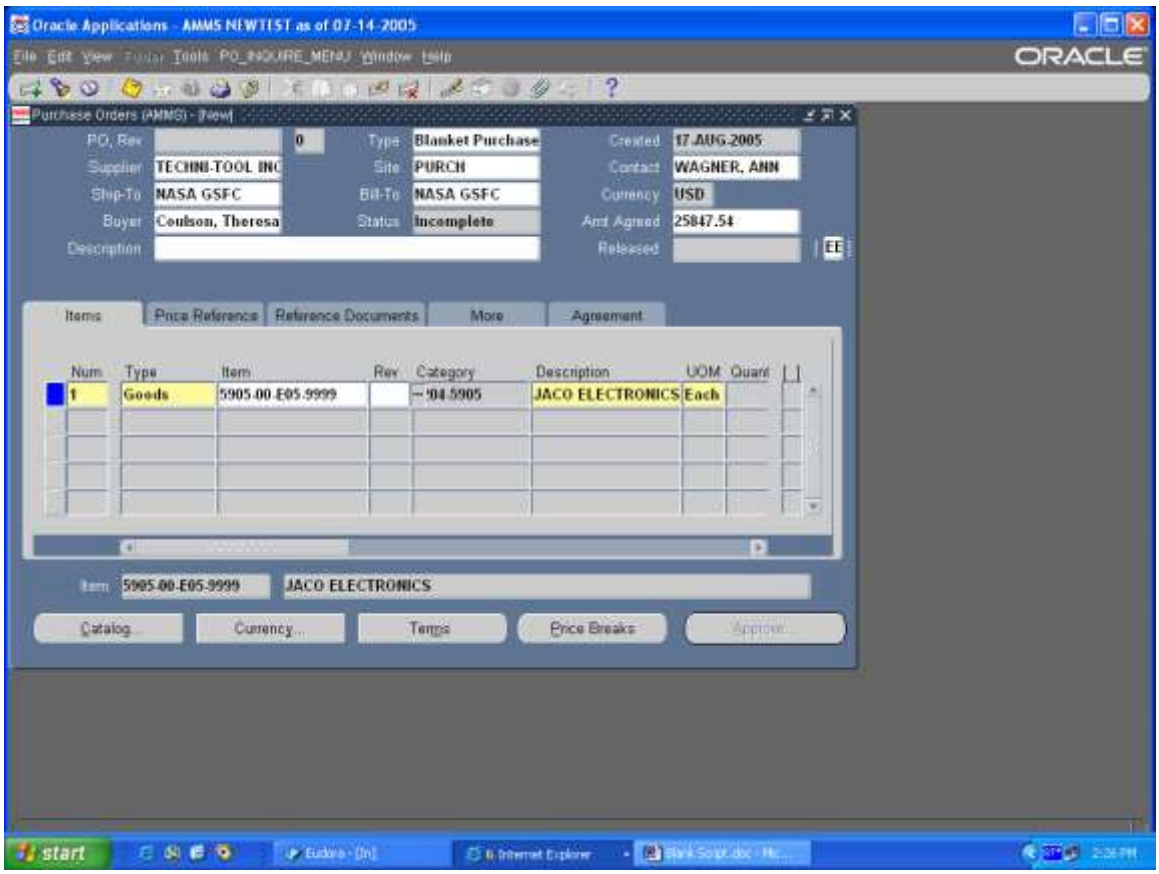
Step Description: In the Amount Agreed field enter the total dollar value for the BPA

Expected Results: Field will be populated with dollar figure



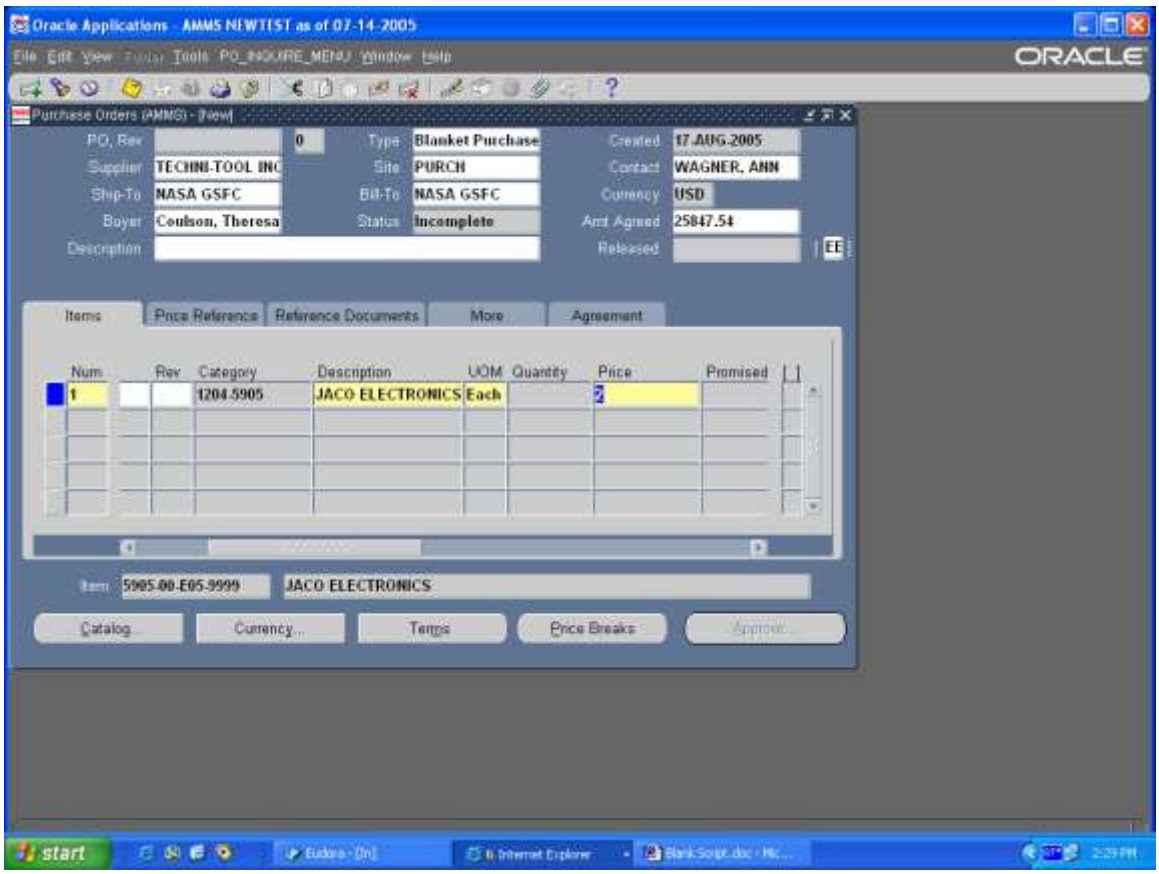
Step Description: At the Line level, Item tab, enter the item number for the BPA

Expected Results: Item, Description, and UOM fields will be populated



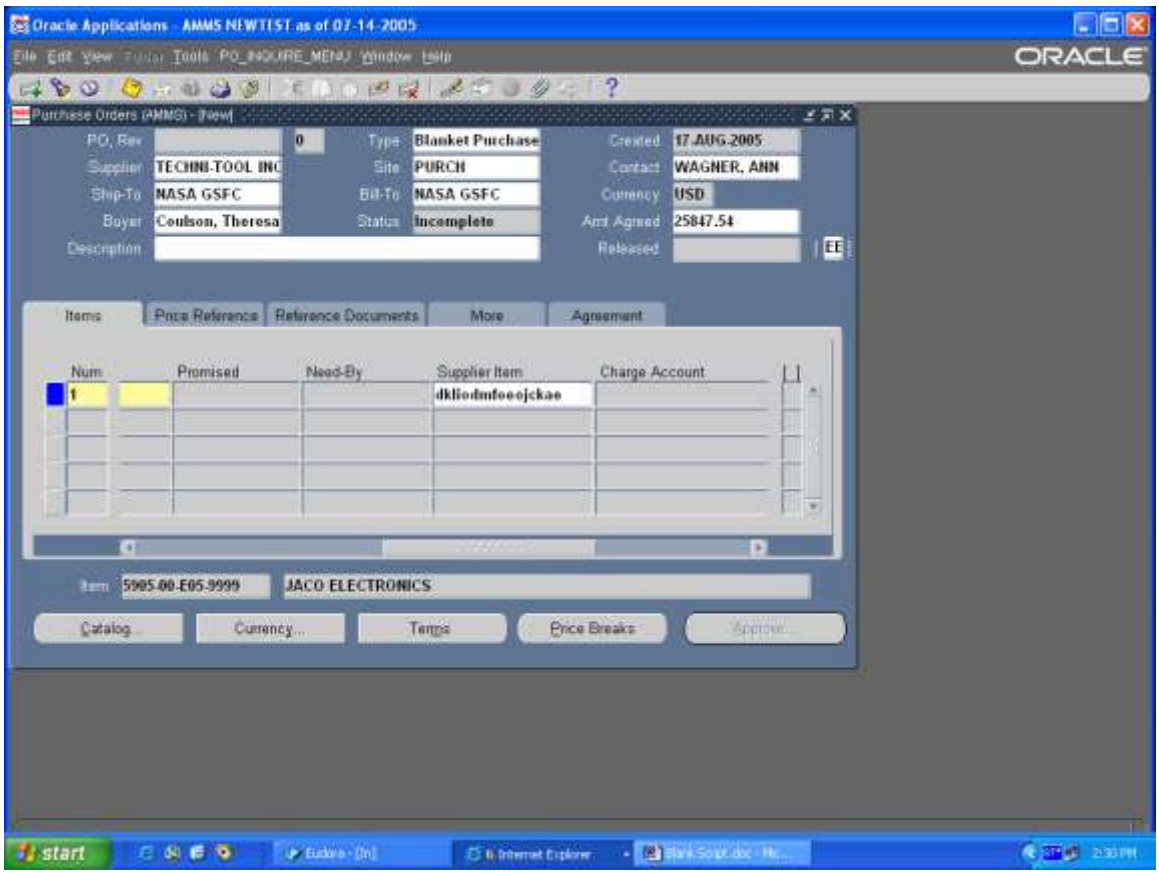
Step Description: Scroll over to the Price field and enter the cost for this Item, this is usually $1.00

Expected Results: Field will be populated



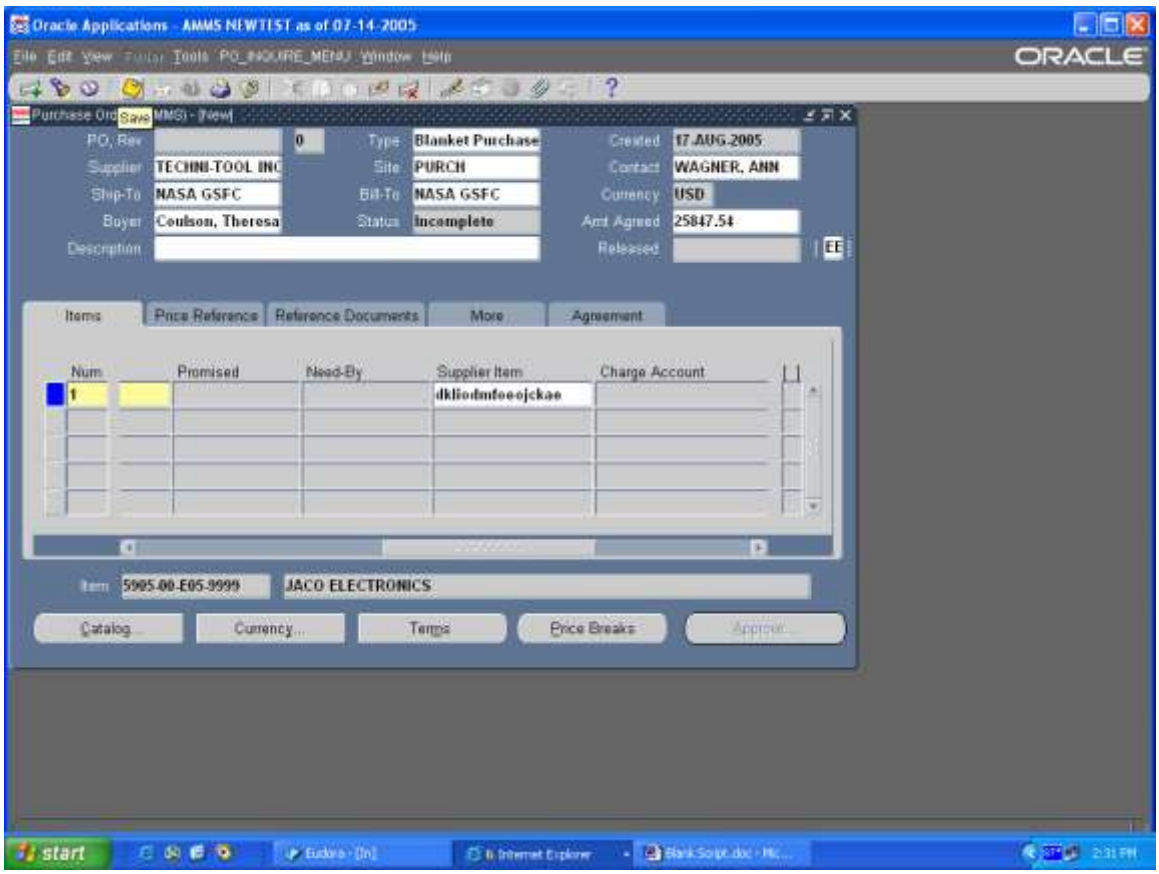
Step Description: Scroll over to the Supplier Item field and enter the part number for this item

Expected Results: Field will be populated



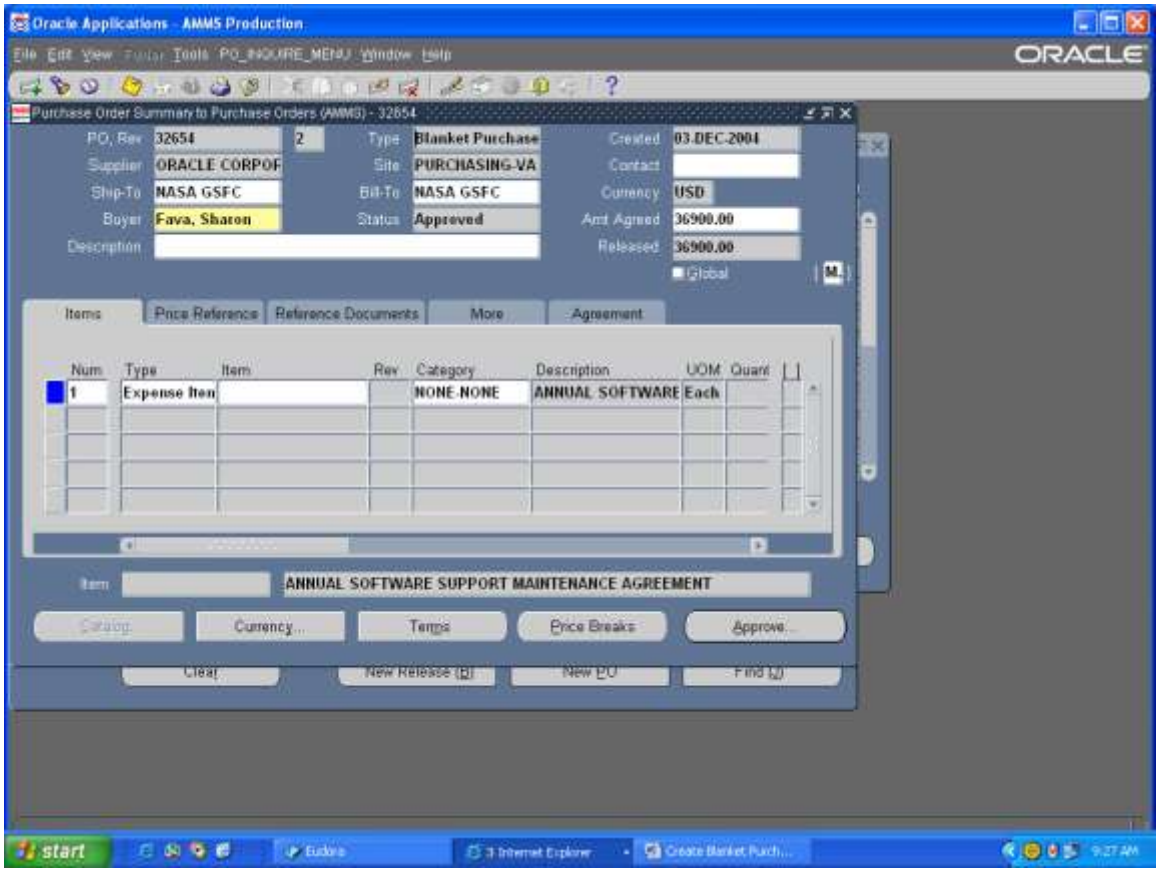
Step Description: Save your work, click on the Save button on the toolbar

Expected Results: PO number assigned, Transaction Saved and Applied message



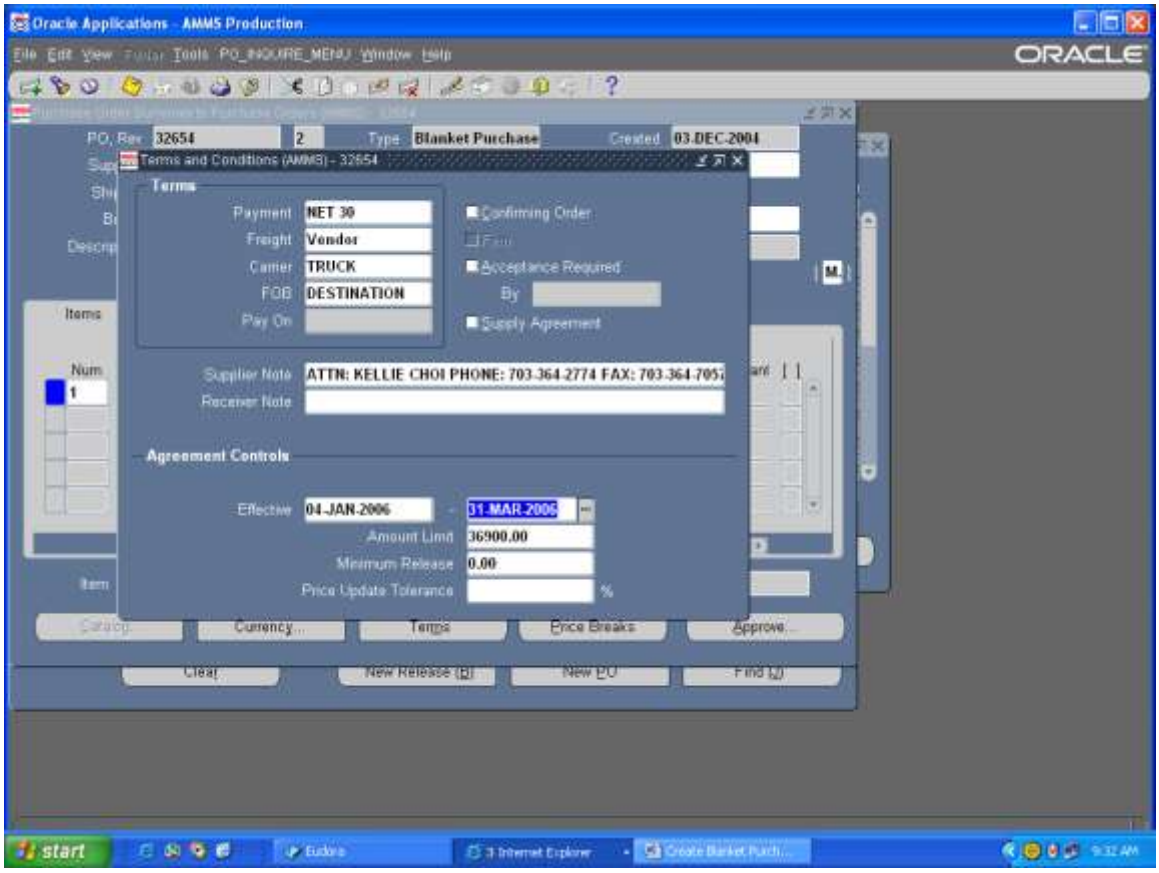
Step Description: Click on the Term button at the bottom of the window

Expected Results: Terms and Conditions window will appear



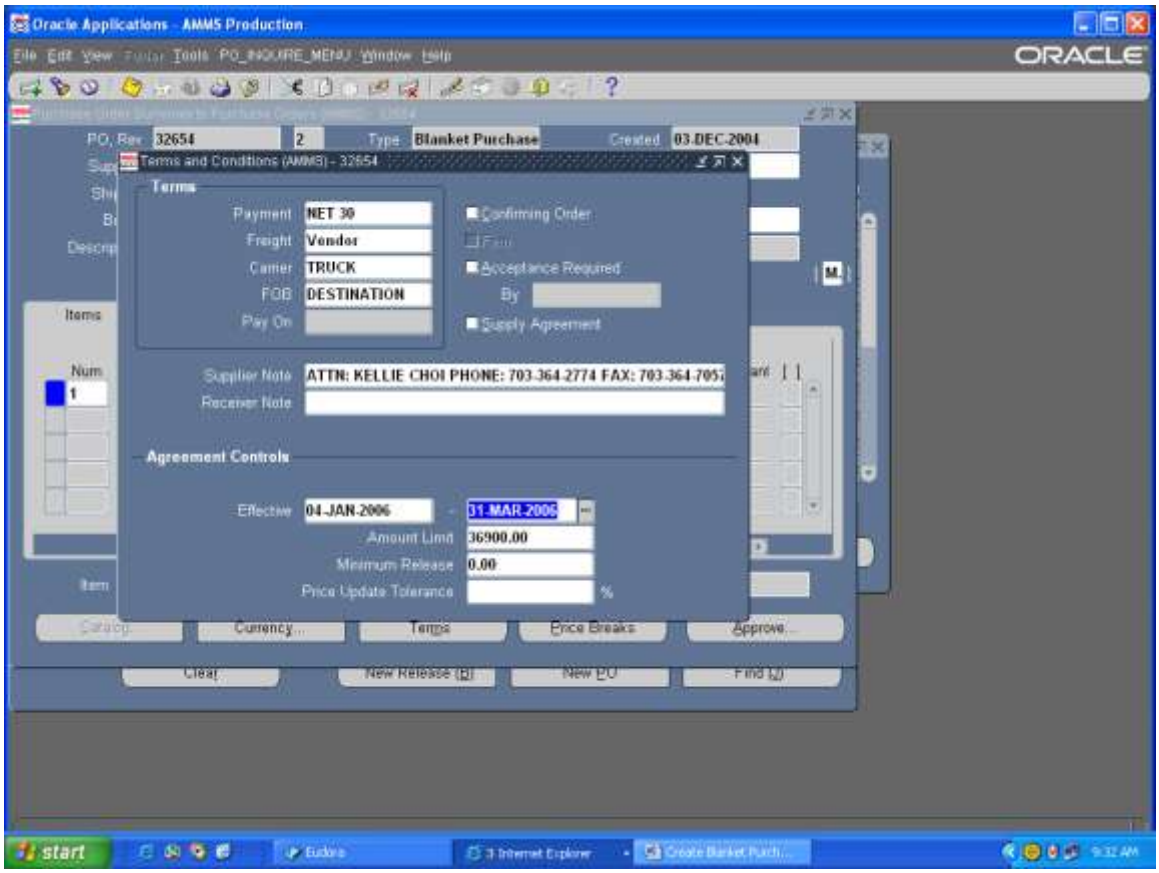
Step Description: Enter the Effective Date, in both fields and the Amount Limit, Save your work

Expected Results: Field will be populated and Transaction Saved and Applied message



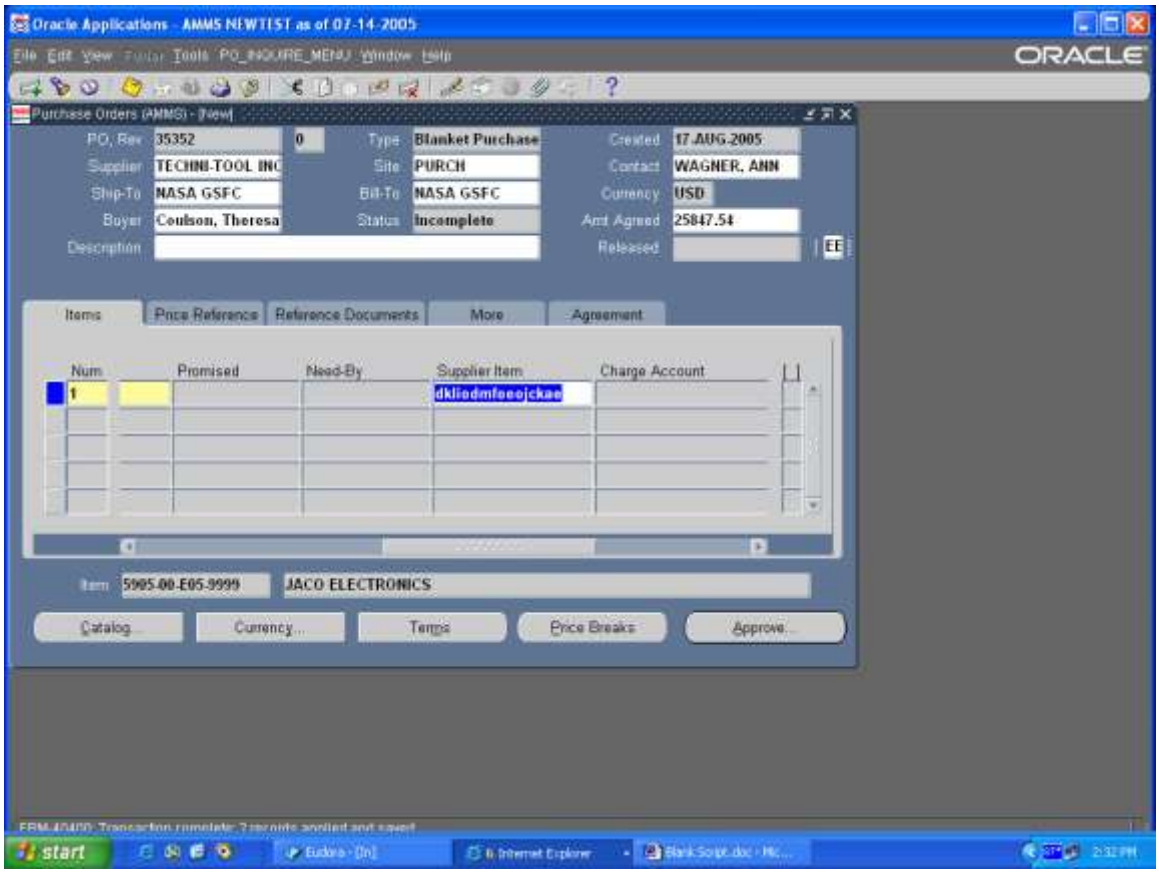
Step Description: Close the Terms and Conditions window

Expected Results: Return to Purchase Order Summary to Purchase Order window



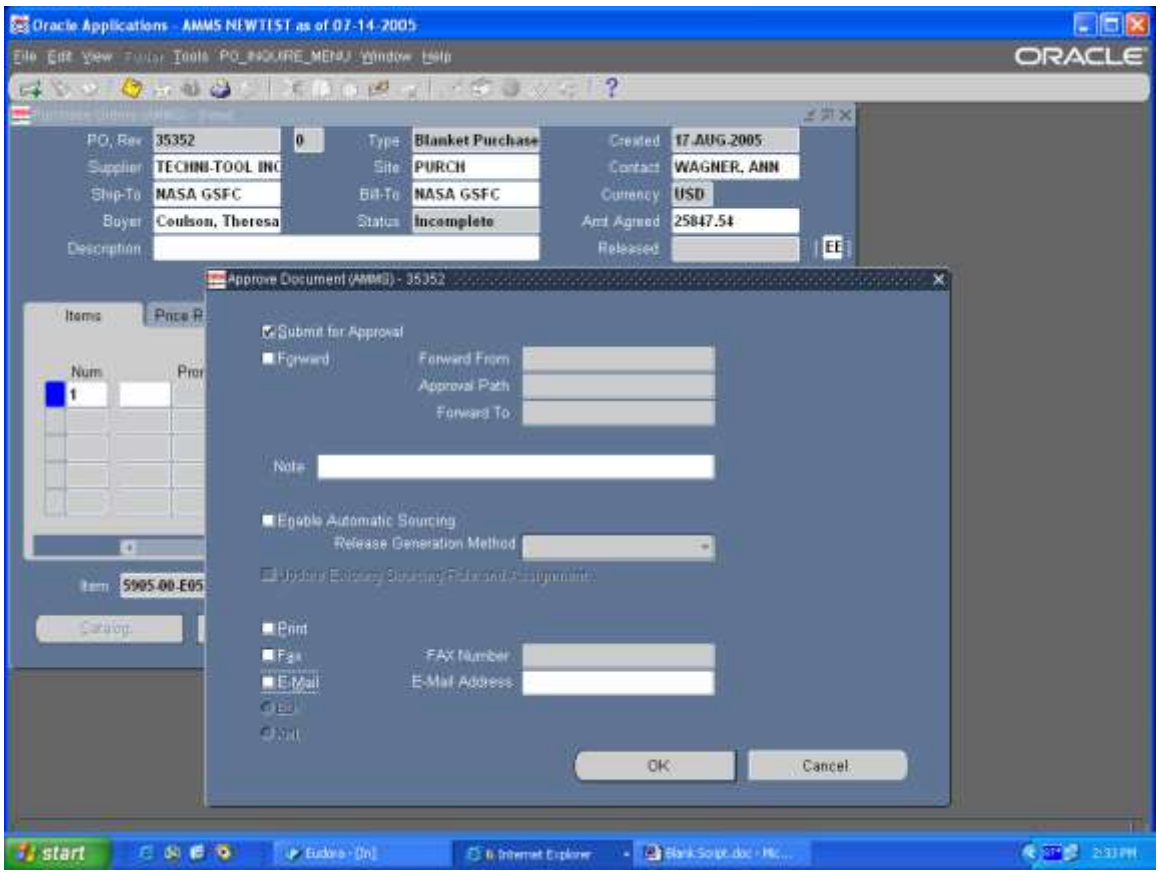
Step Description: Approve the BPA, click on the Approve button

Expected Results: Approval Document window will appear



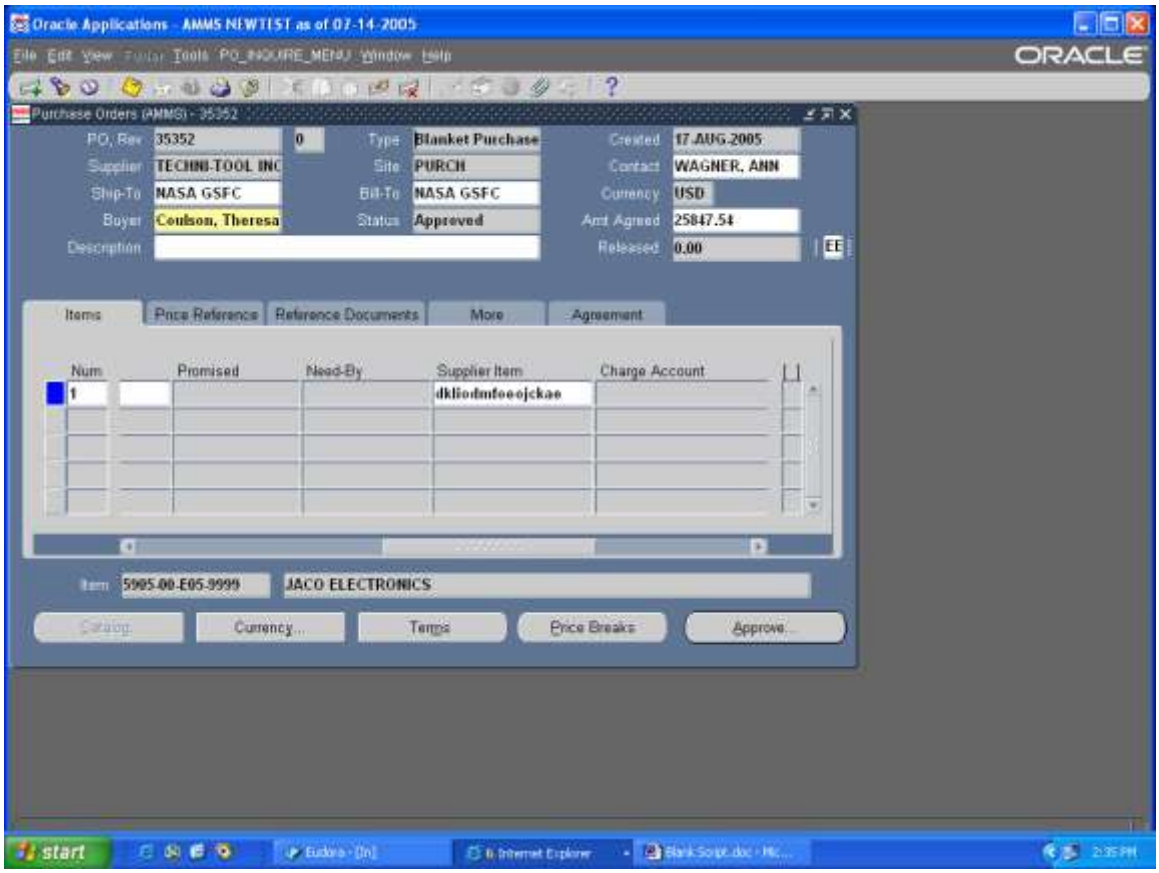
Step Description: Remove the check mark from the email box, and click OK

Expected Results: Note window will appear



Step Description: Click OK to the Note

Expected Results: Window will go away, status on BPA will be Approved



You have created a Blanket Purchase Agreement

AMMS TRAINING SCRIPT
Create Expense BPA Release

Purpose

The purpose of this training script is to show how to create an Expense BPA Release

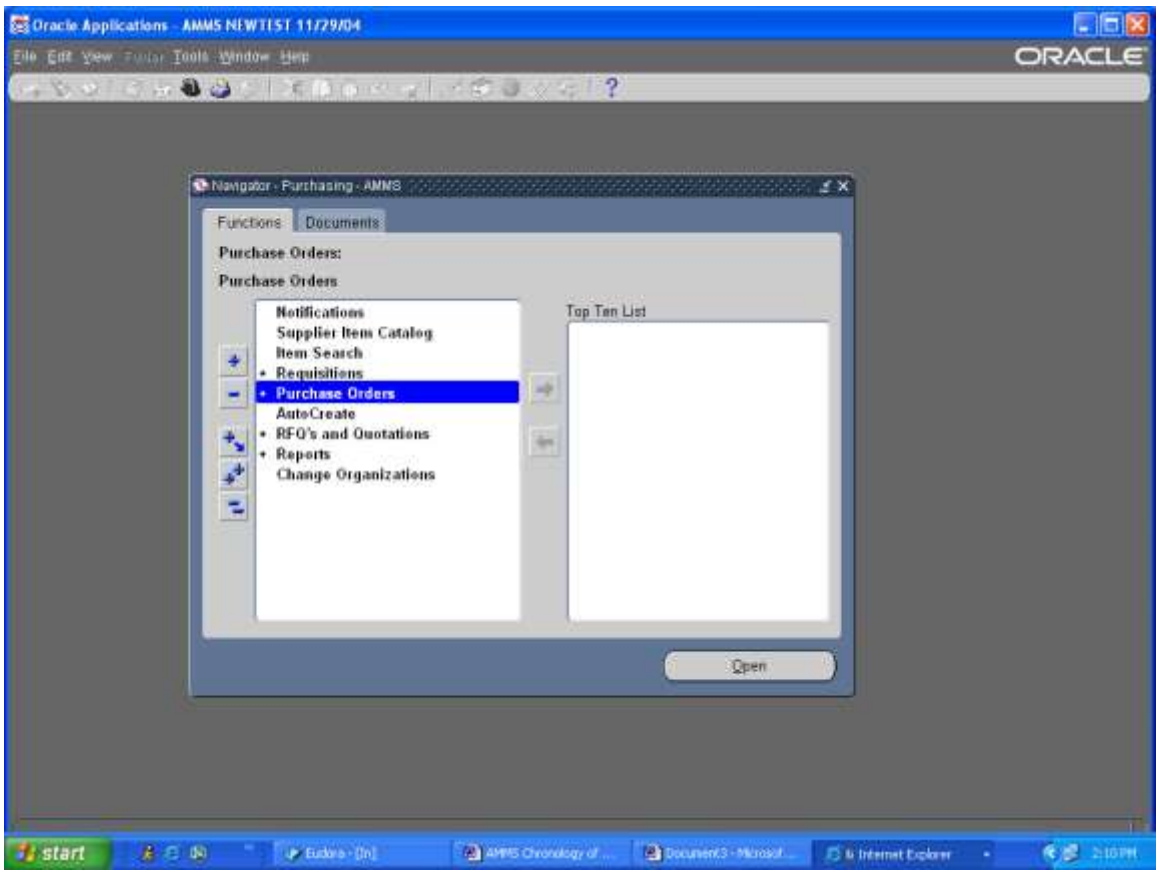
Audience

Buyers

Prepared By	Theresa Coulson
Creation Date:	12/14/2004
Document Name	Create Expense BPA Release.doc
Version	4
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Purchasing.	

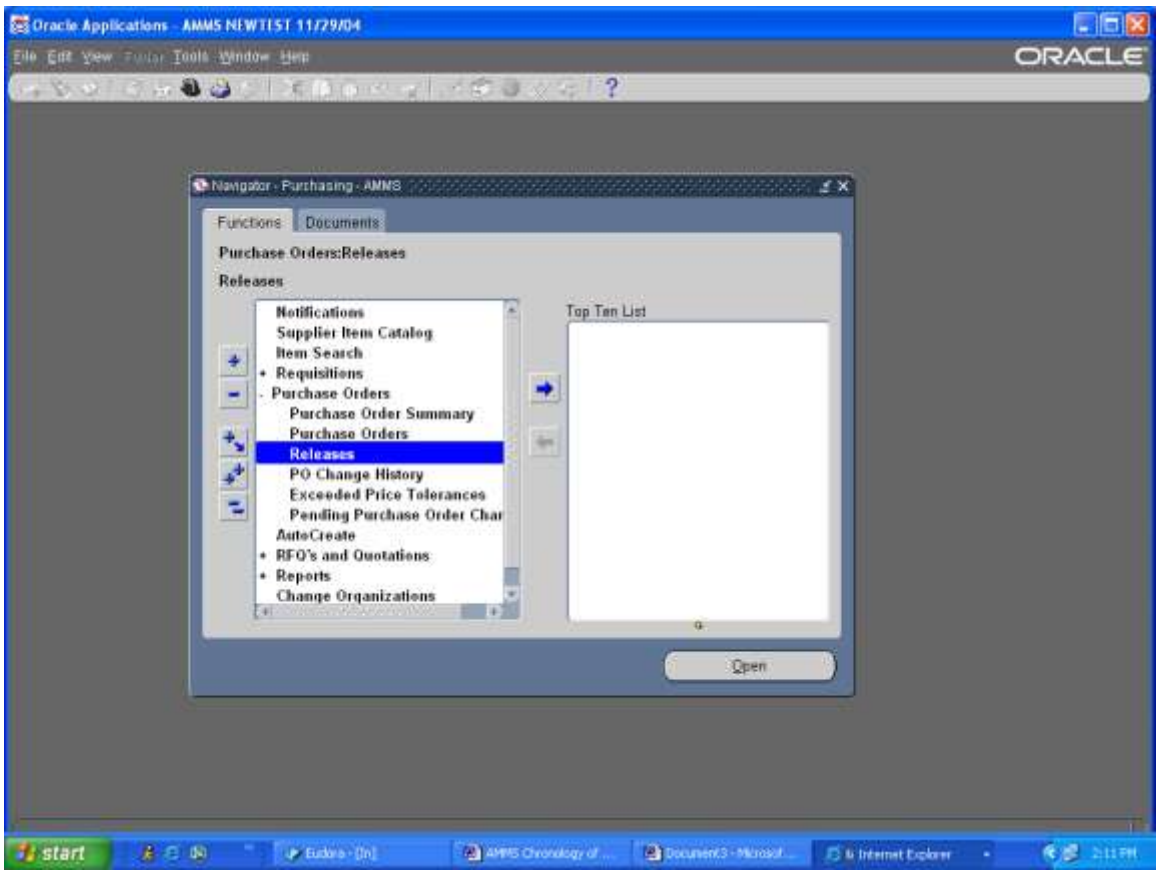
Step Description: Sign onto Oracle and select the Purchasing AMMS responsibility

Expected Results: The Purchasing AMMS main menu will appear



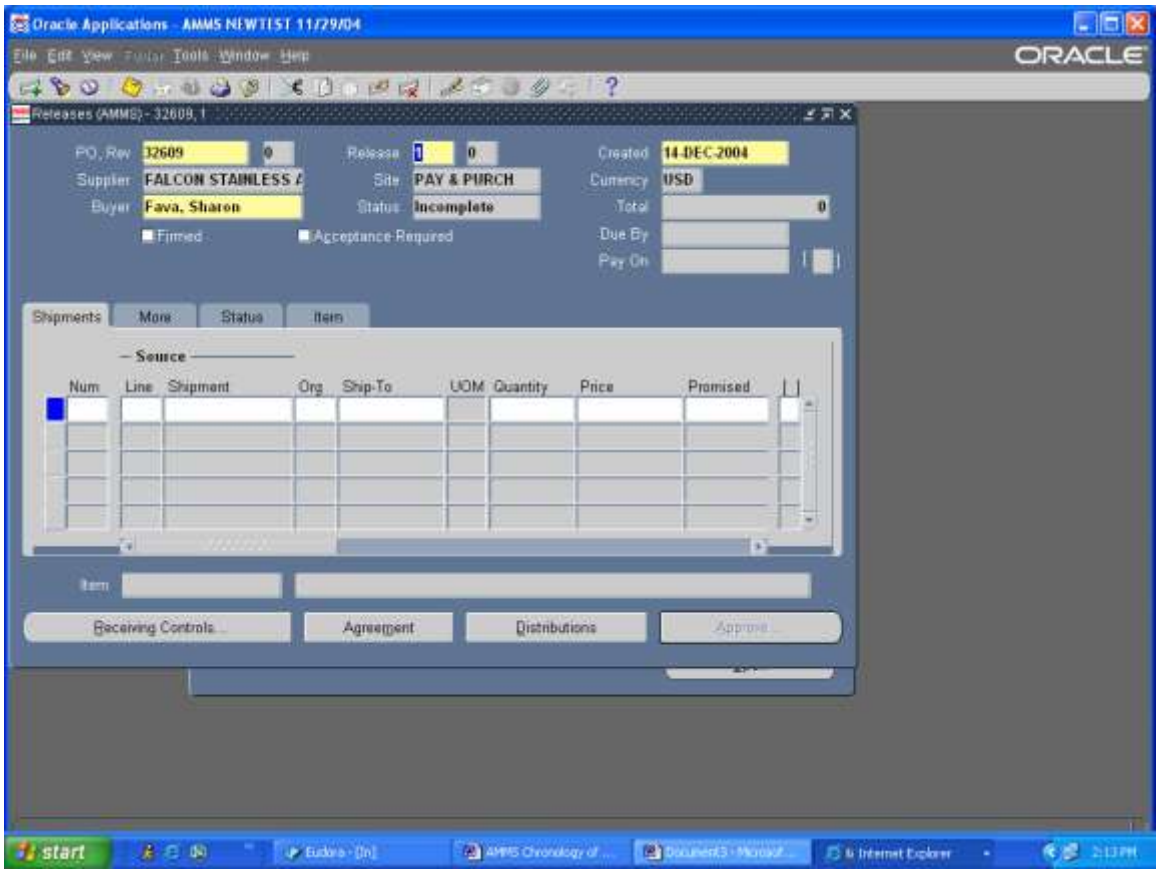
Step Description: From the Purchasing AMMS main menu select Purchase Orders > Releases, click on Open

Expected Results: The Release window will open



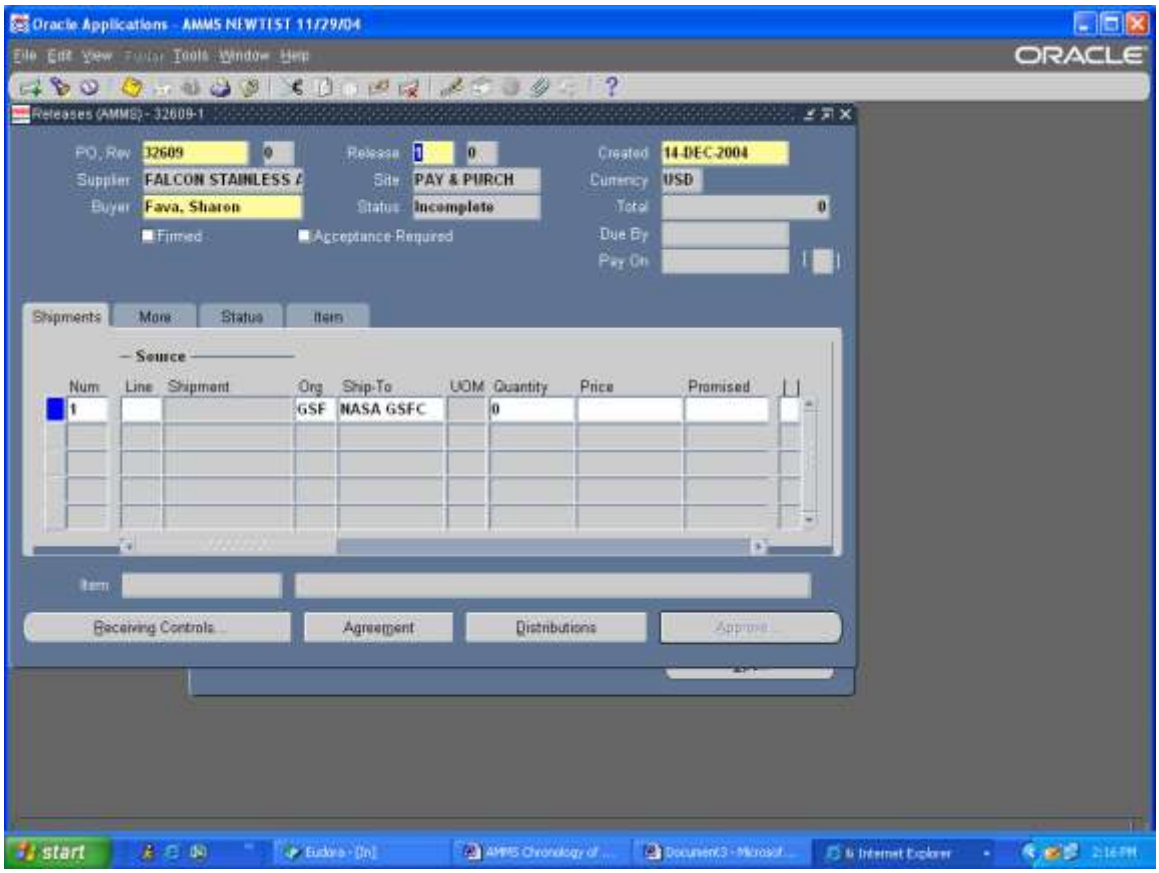
Step Description: In the PO,Rev field enter the BPA number, then tab

Expected Results: BPA information will populate



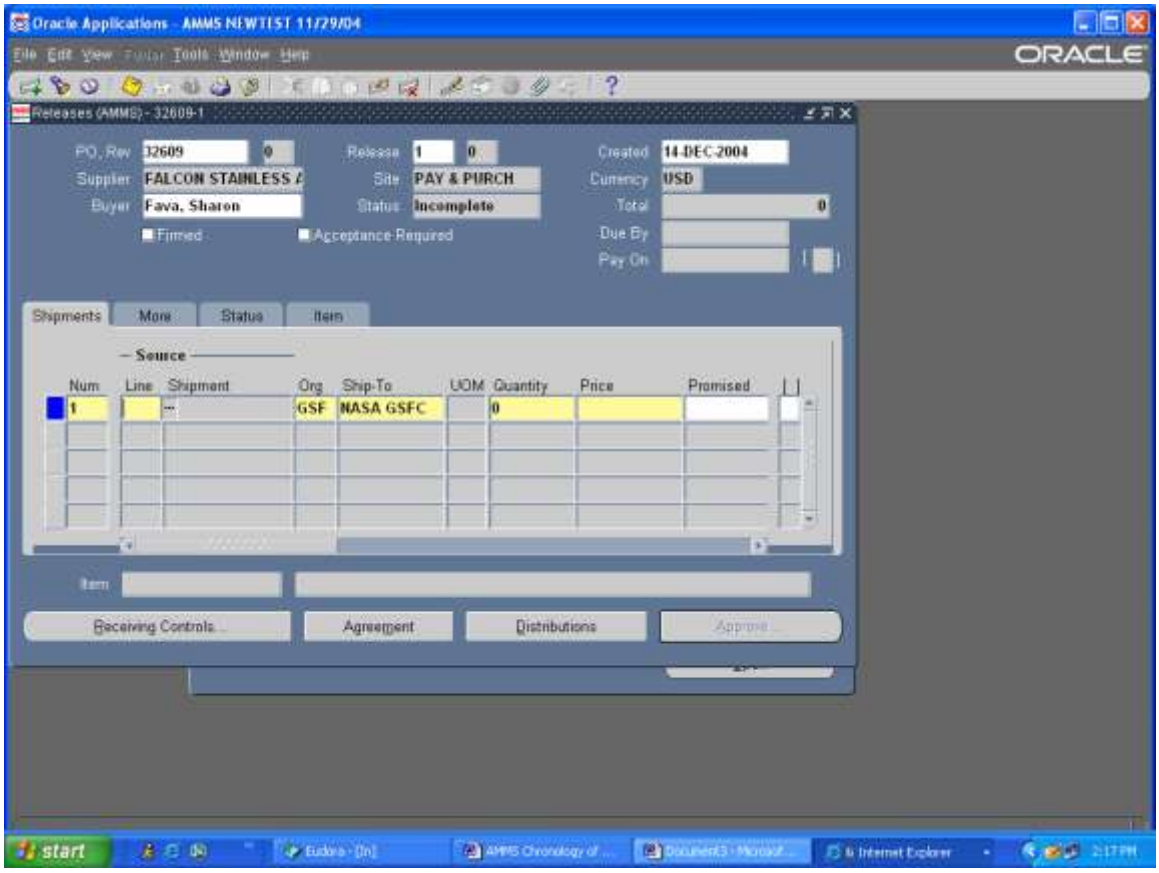
Step Description: Go to the Release field, you can create any release number that you want, or you can let Oracle default the release number, if you want to change the number click in the field and enter the new release number

Expected Results: Release number will change if new number entered



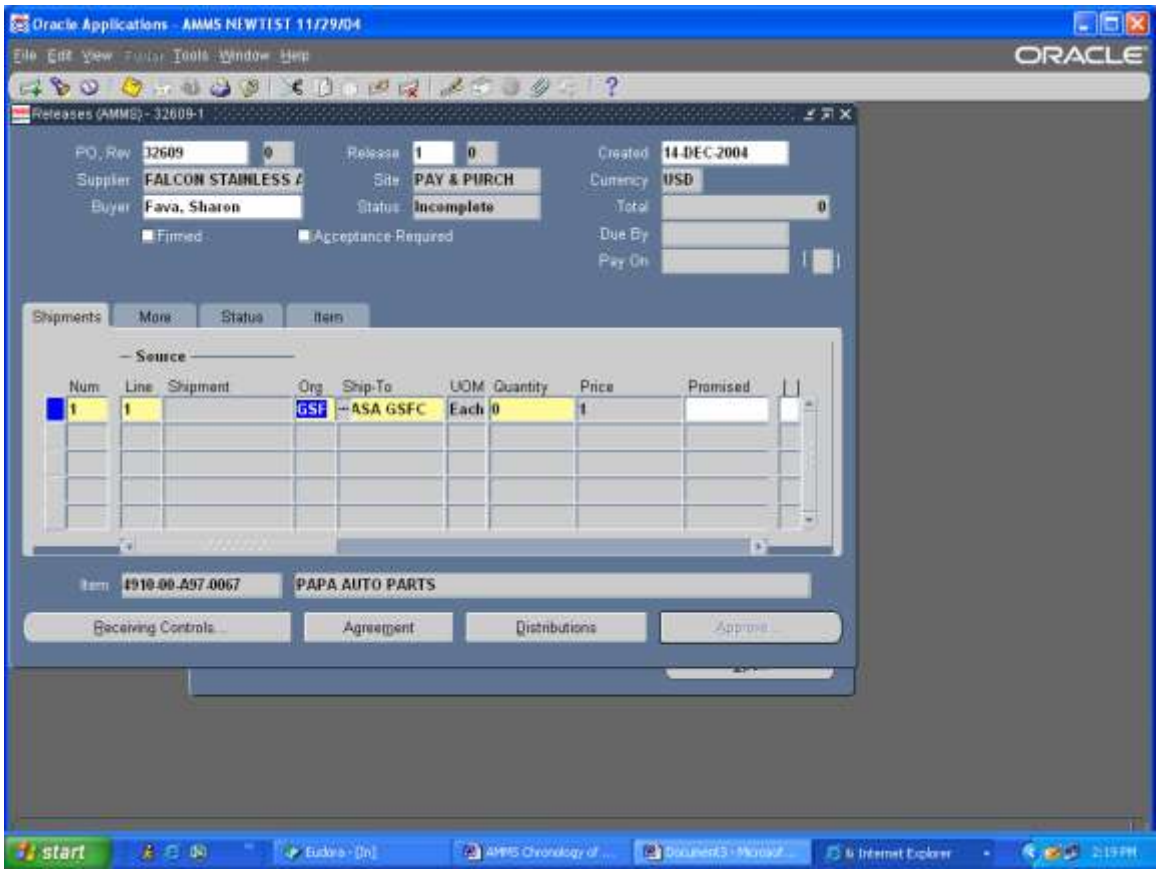
Step Description: At the bottom of the screen at the Shipments tab click in the Number field, the number will default, if you would like you can change this number to any other number.

Expected Results: Number field will be populated



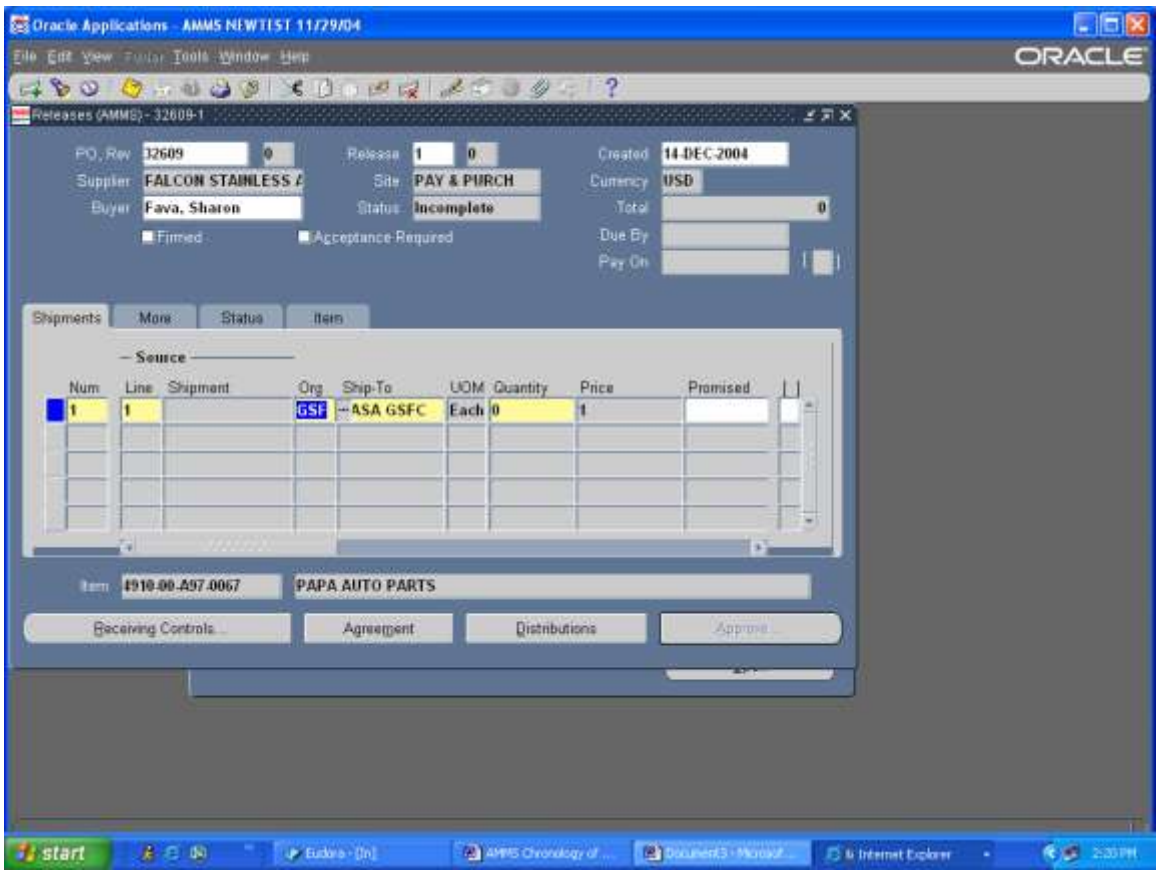
Step Description: Tab to Line field and enter the line number

Expected Results: Field will be populated



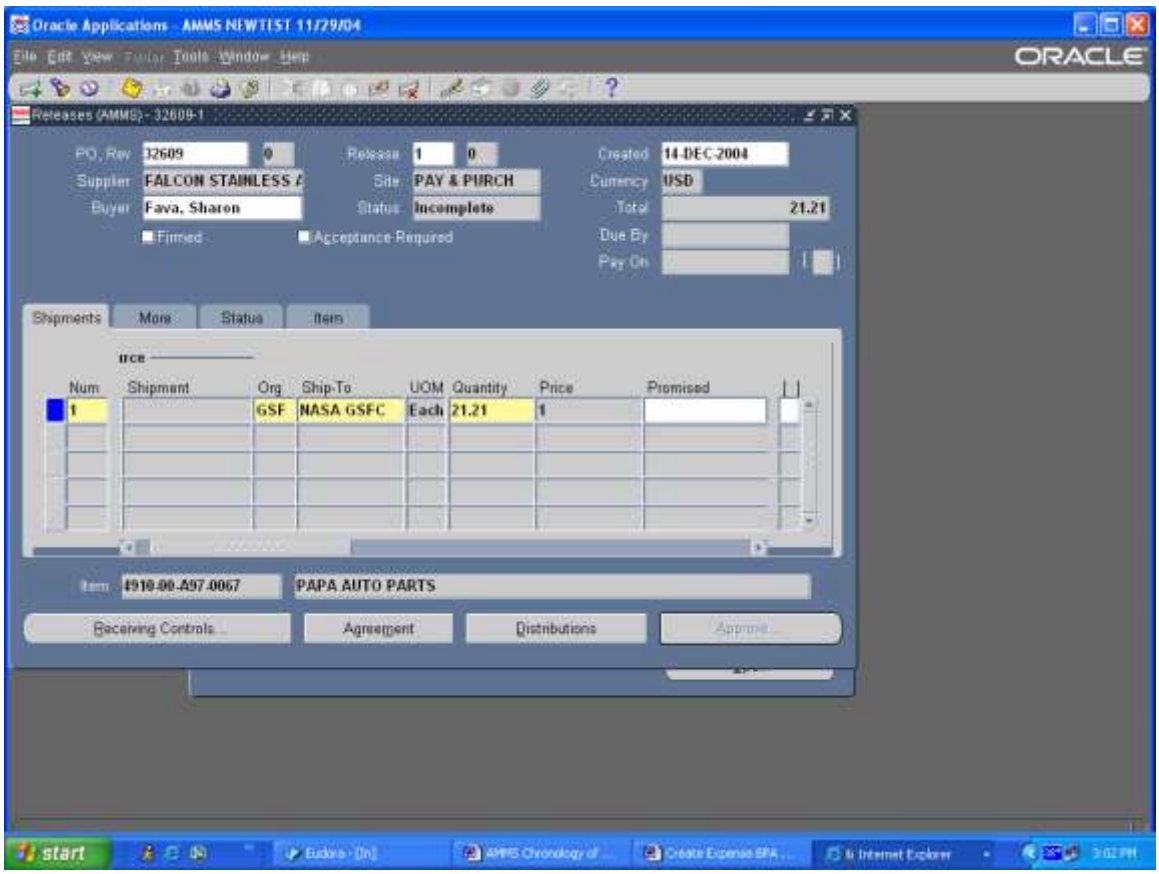
Step Description: You will see that the Organization and Ship to will Default

Expected Results: Fields will be populated



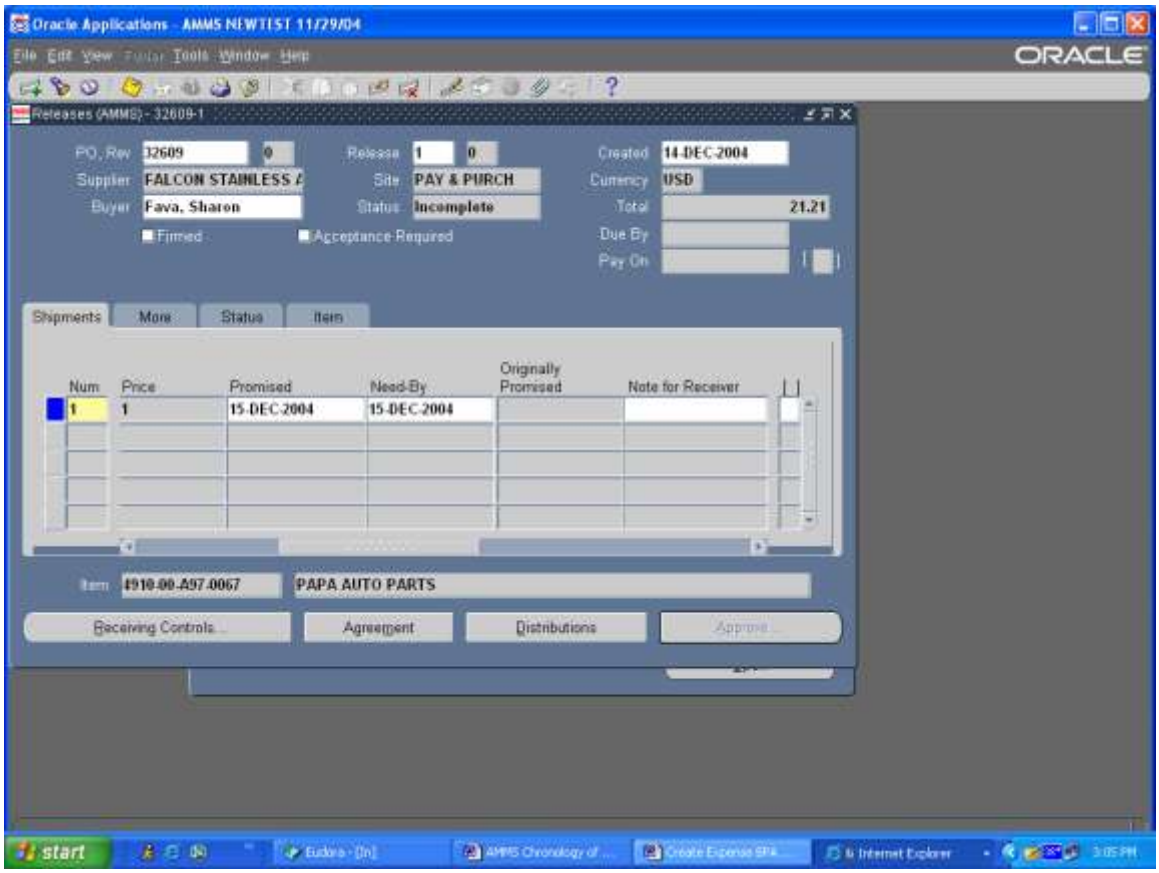
Step Description: Tab to the Quantity field and enter the COST of the release. Example 21.21

Expected Results: Quantity field will have cost



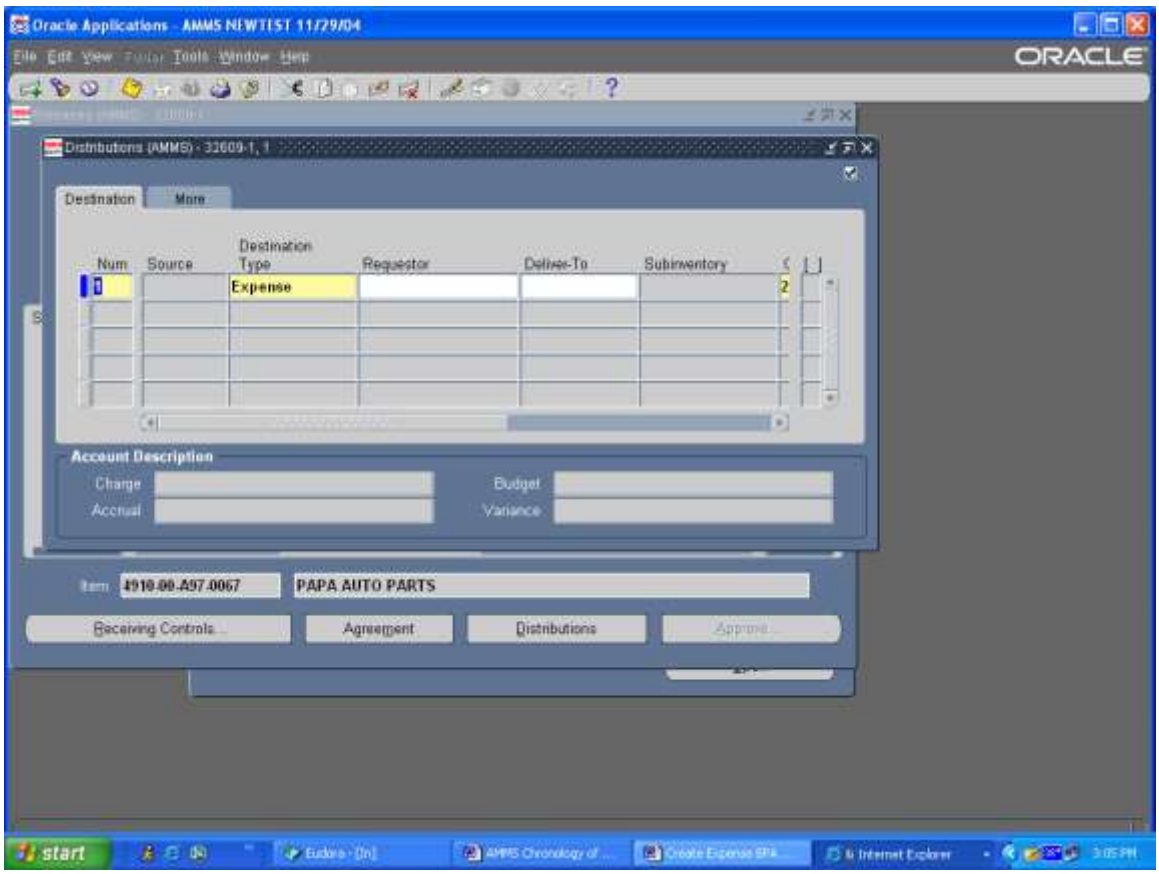
Step Description: Tab to the Promise Date field and click on the LOV enter the date the material is scheduled to arrive. Tab to the Need By date field and click on the LOV also select the date the material is scheduled to arrive.

Expected Results: Fields will be populated



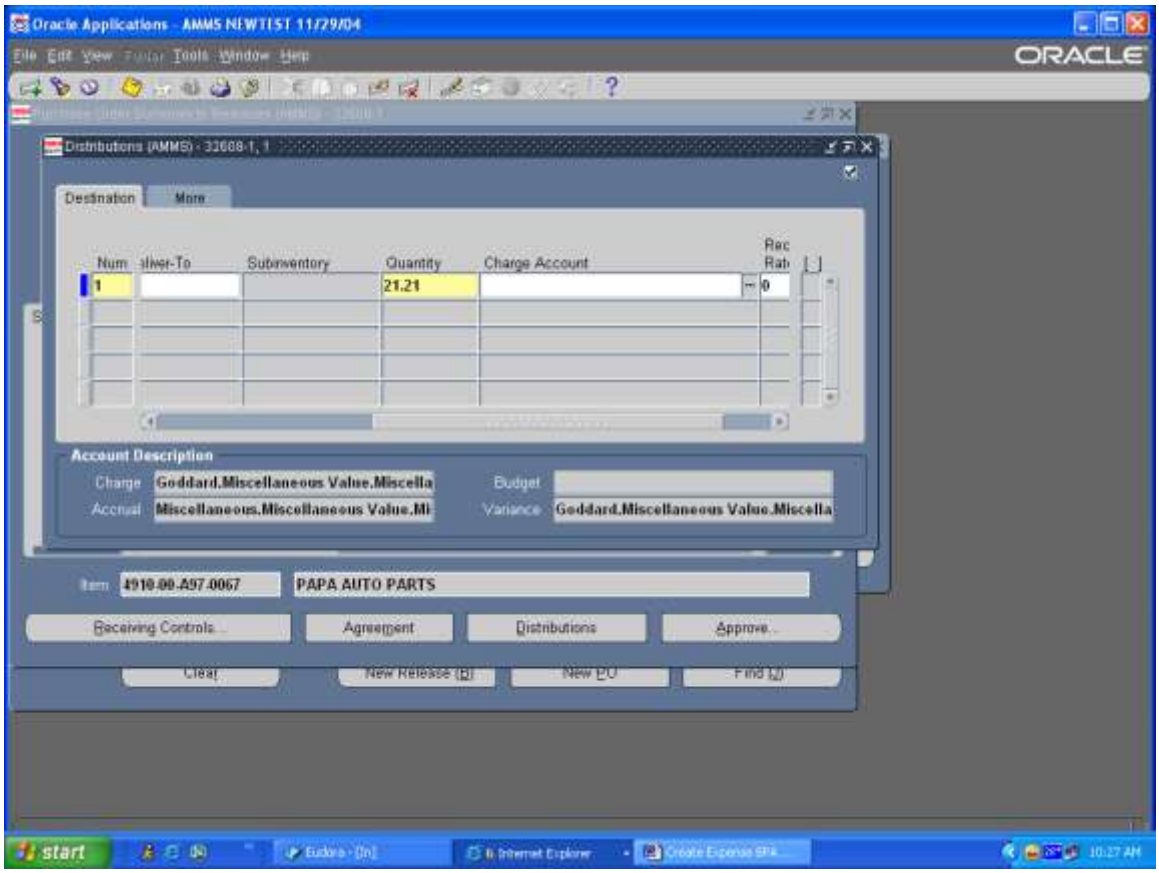
Step Description: Click on the Distributions button at the bottom of the screen

Expected Results: The Distributions window will open



Step Description: Use the scroll bar and move to the Charge Account field

Expected Results: You will see Charge account field

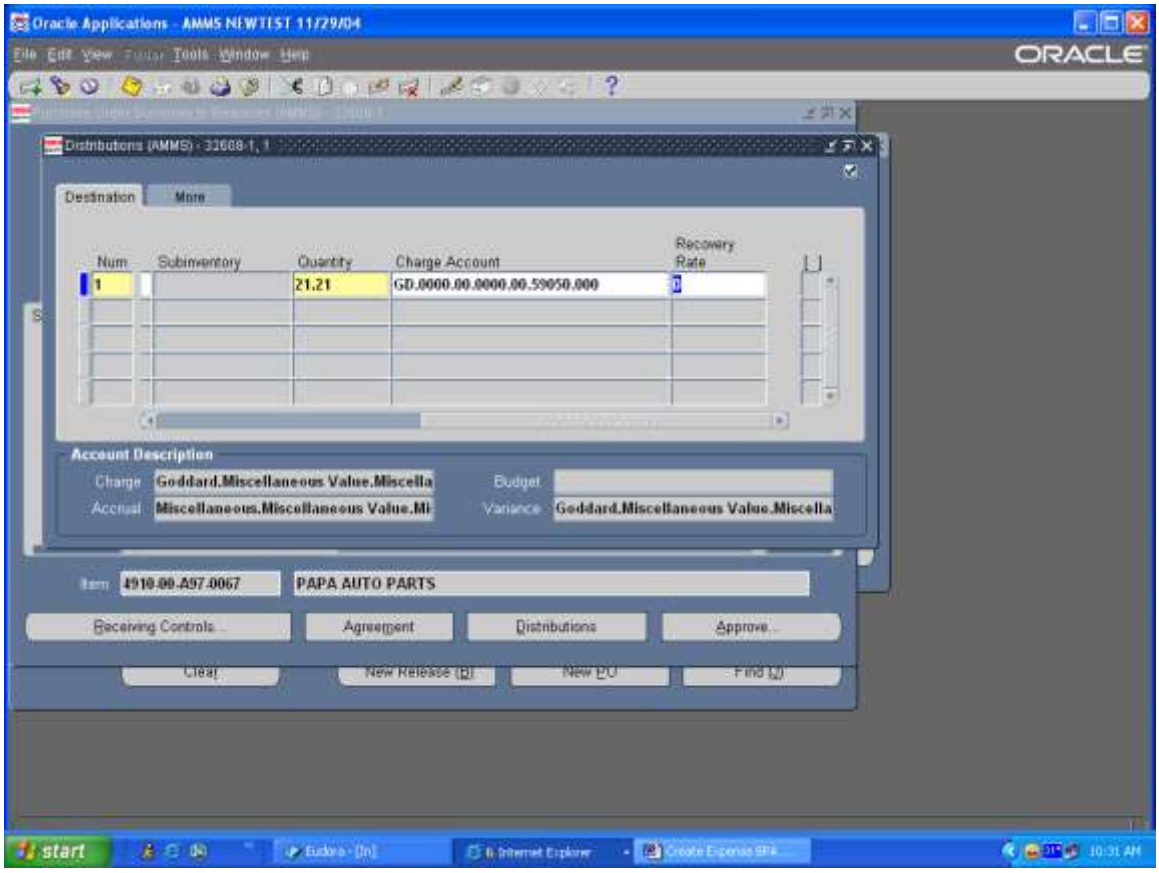


Step Description: Click on the LOV and enter the Expense GL number (GL number will always start with GD for Goddard or WF for Wallops)

Expected Results: Fields will be populated

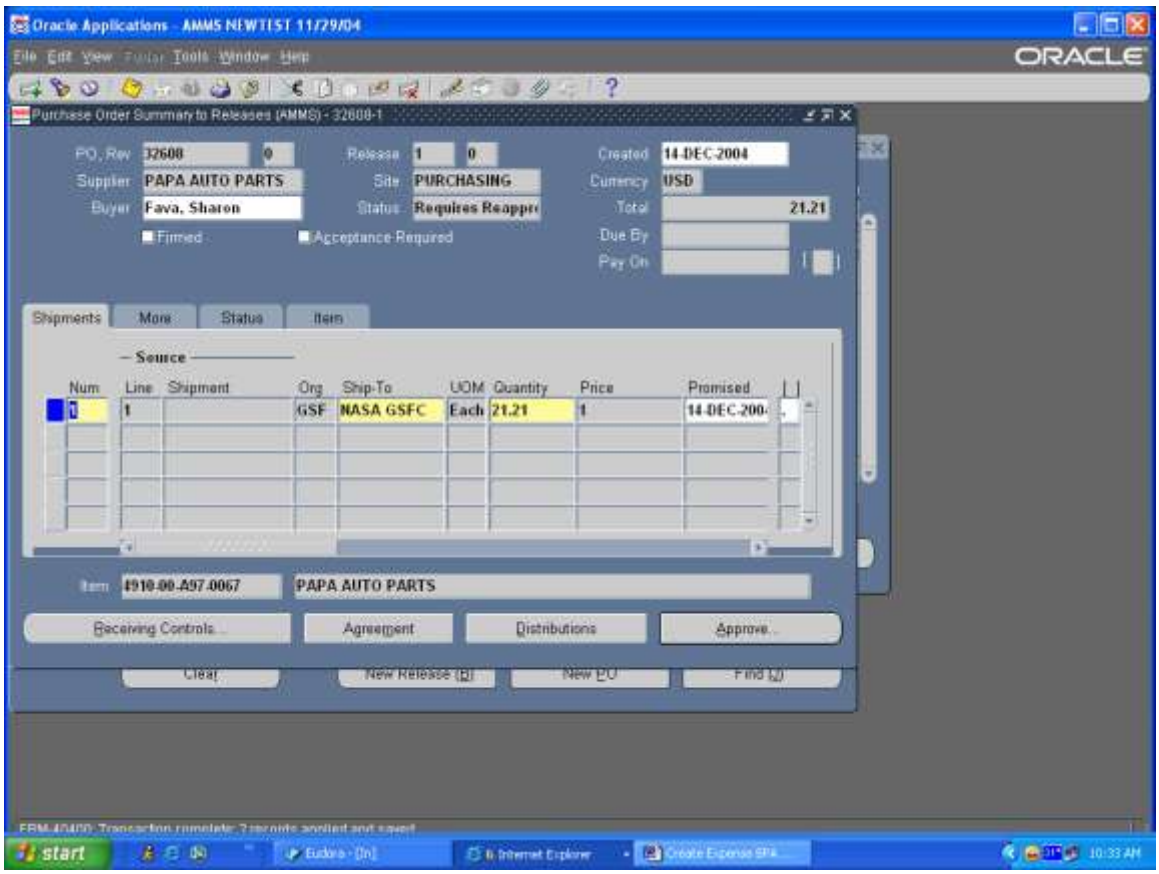
Step Description: Click OK to the Charge Account window and the Charge Account field will be populated

Expected Results: Charge Account window will close and Charge Account field will be populated



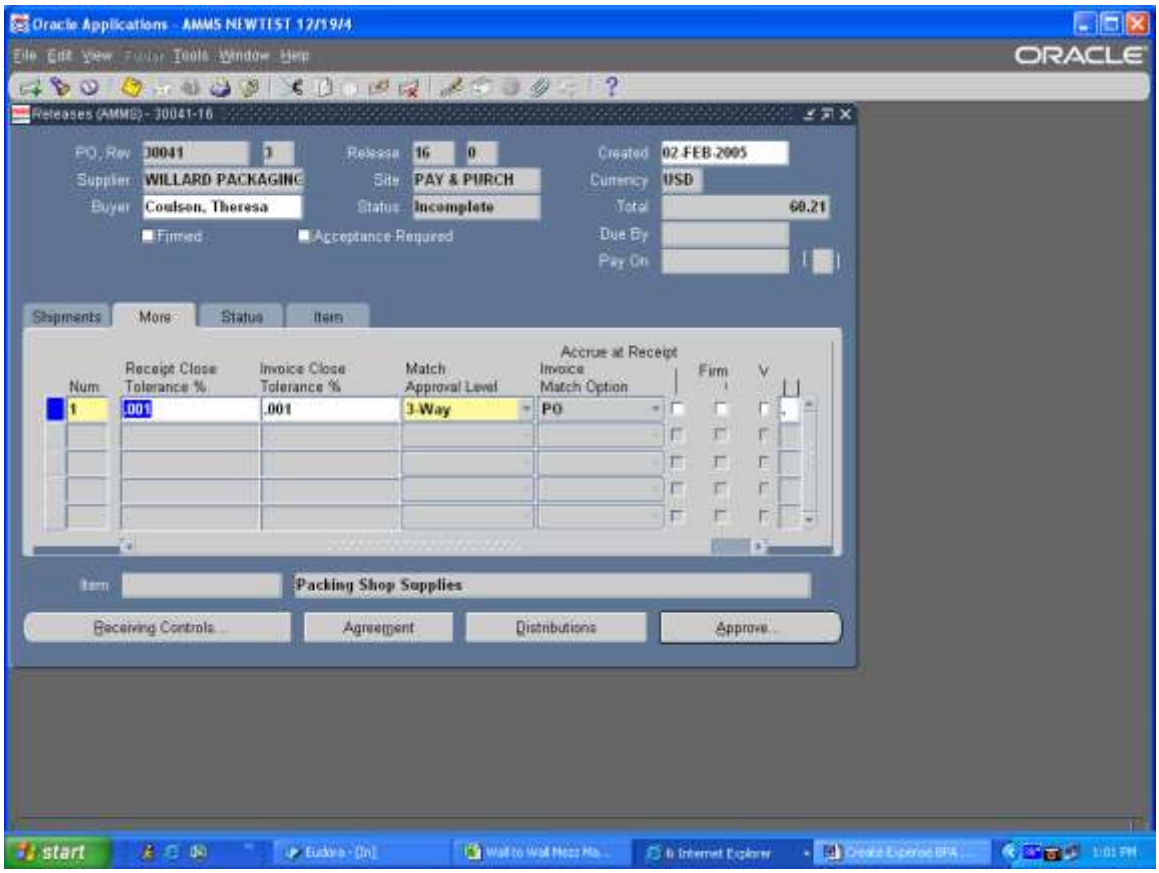
Step Description: Close the Distributions window

Expected Results: You will return to the Purchase Order Summary to Release window



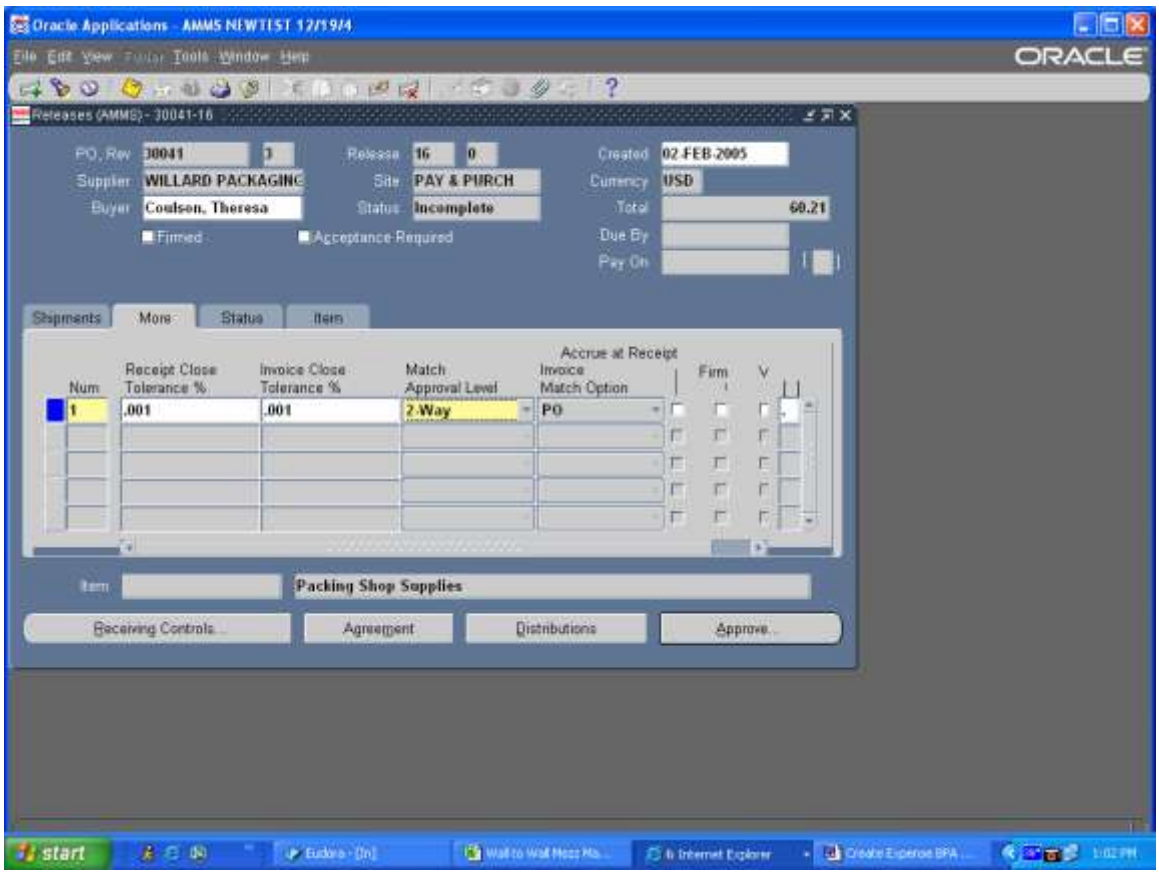
Step Description: Click on the More tab

Expected Results: Window view will change



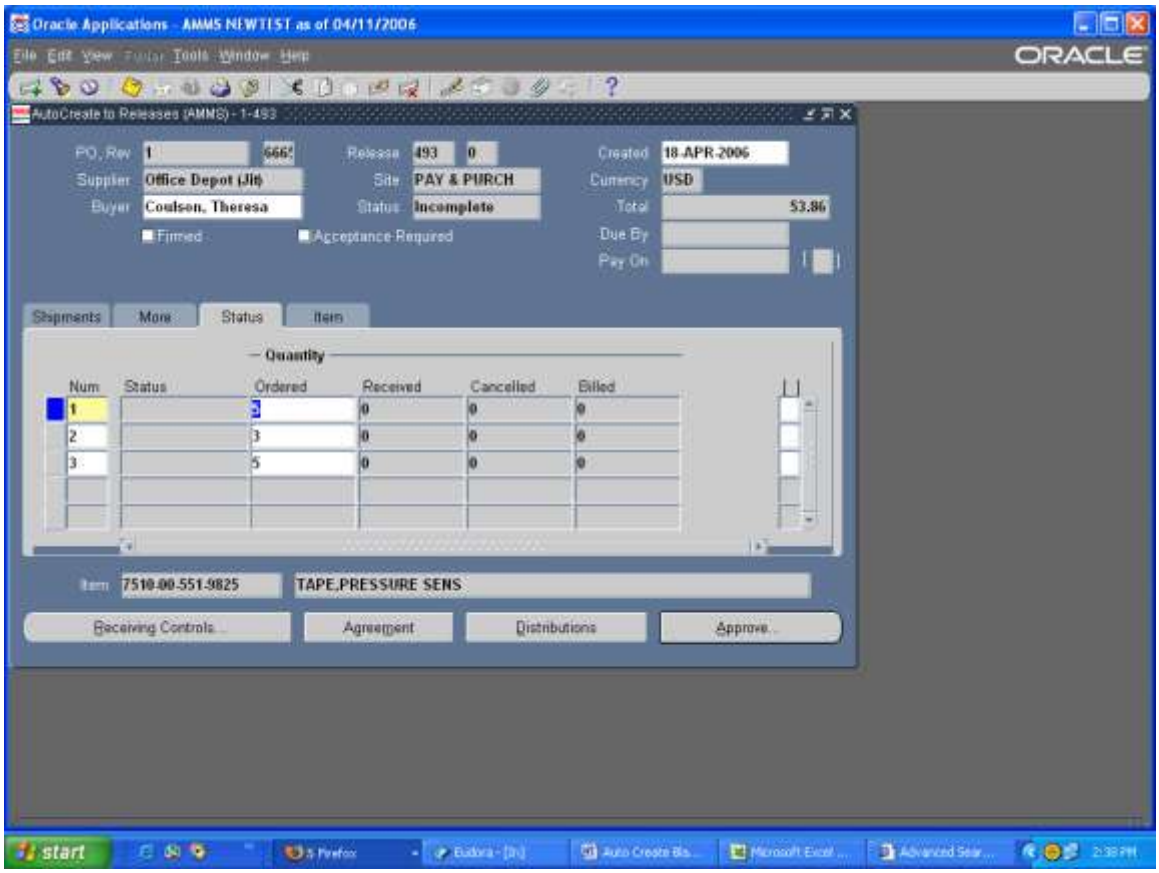
Step Description: Go to the Match Approval Level field and change to 2 Way Match, THIS MUST BE DONE FOR ALL EXPENSE RELEASES

Expected Results: Field data will change



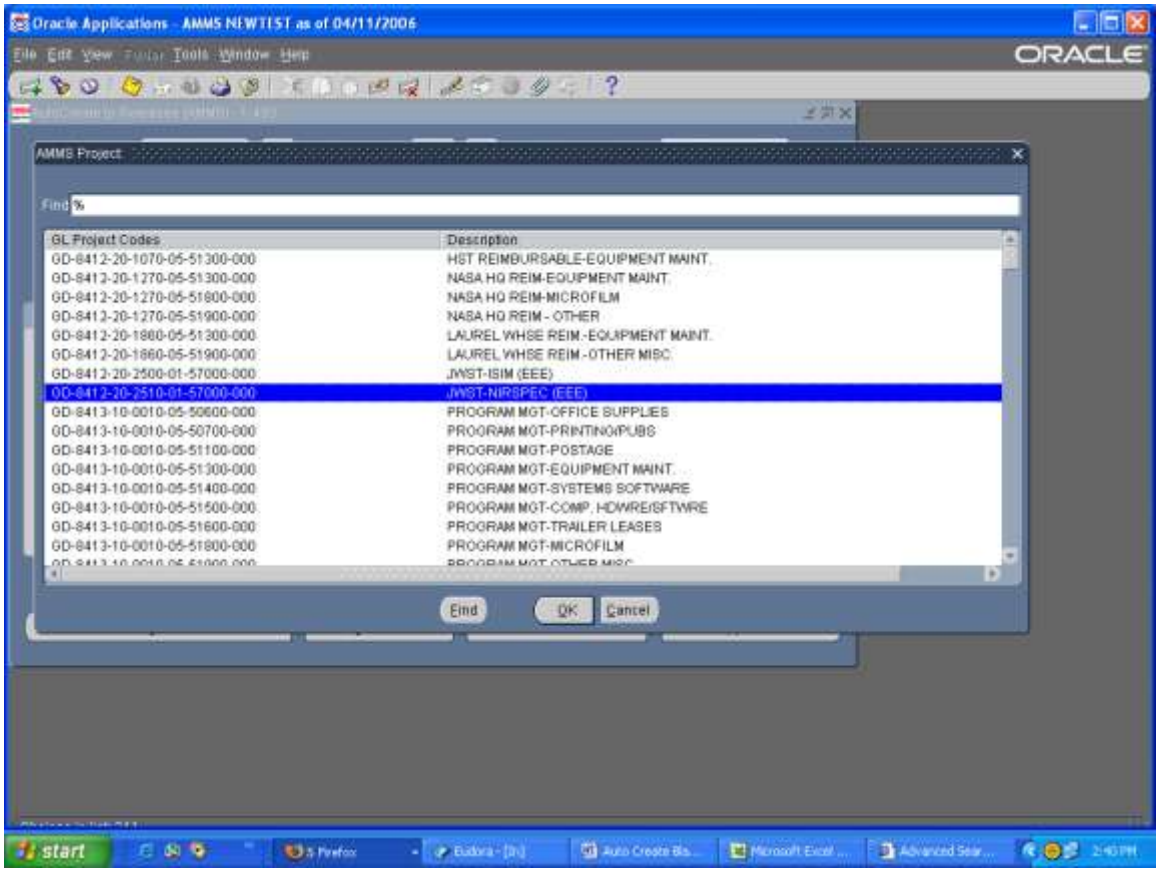
Step Description: At the end of the line click in the [ ] field

Expected Results: PO Lines Location window will appear



Step Description: From the AMMS Project field click on the LOV and select the appropriate GL number for the release you are creating, click OK

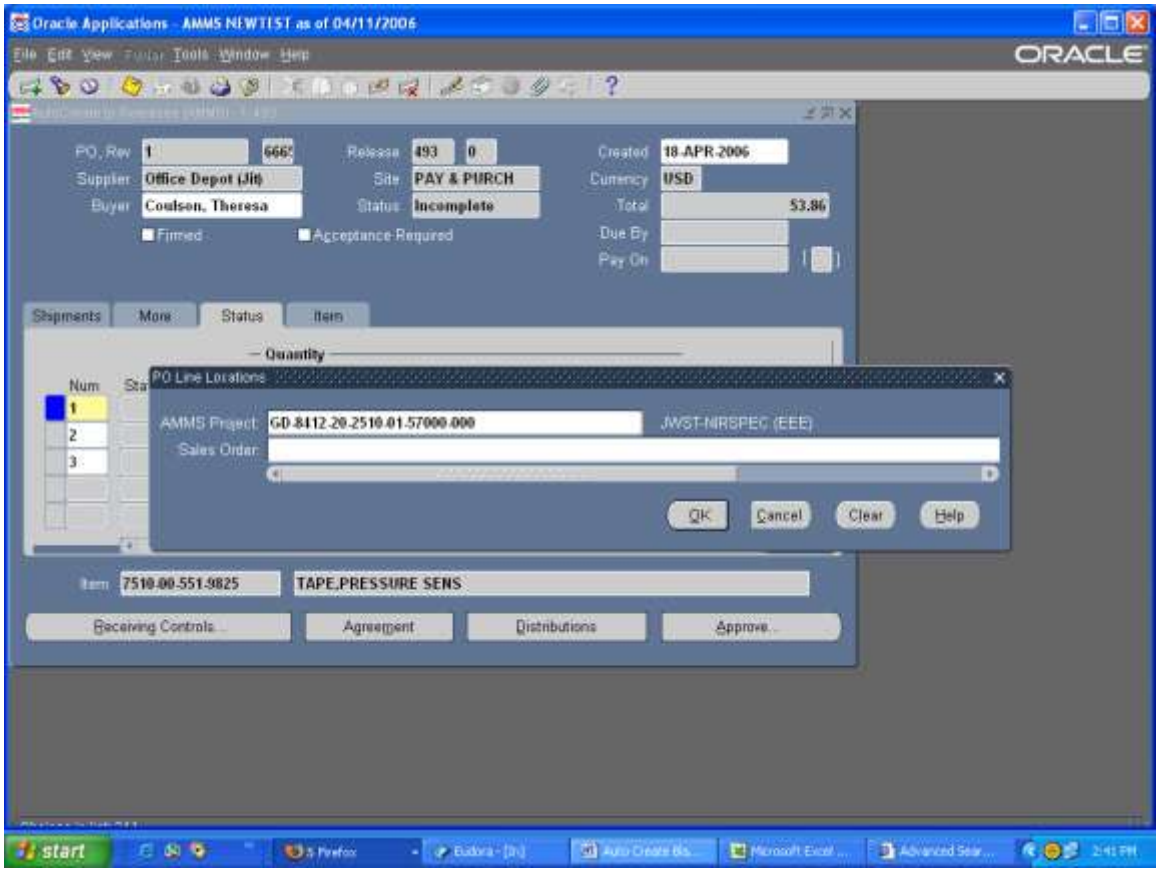
Expected Results: AMMS Project field will be populated



Note: Enter a GL project number for each line on the release.

Step Description: Click OK to the PO Lines Location window

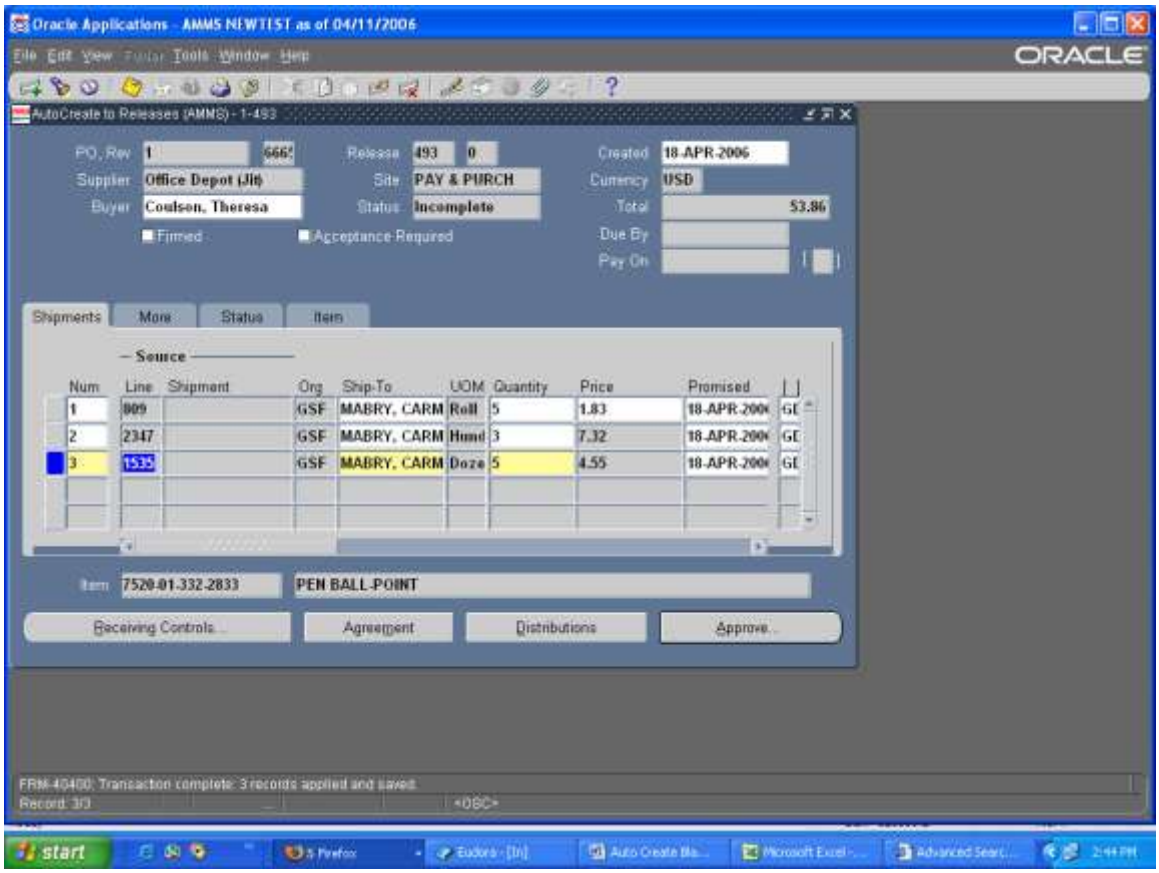
Expected Results: Return to Autocreate to Release window



Note: Enter a GL project number for each line on the release.

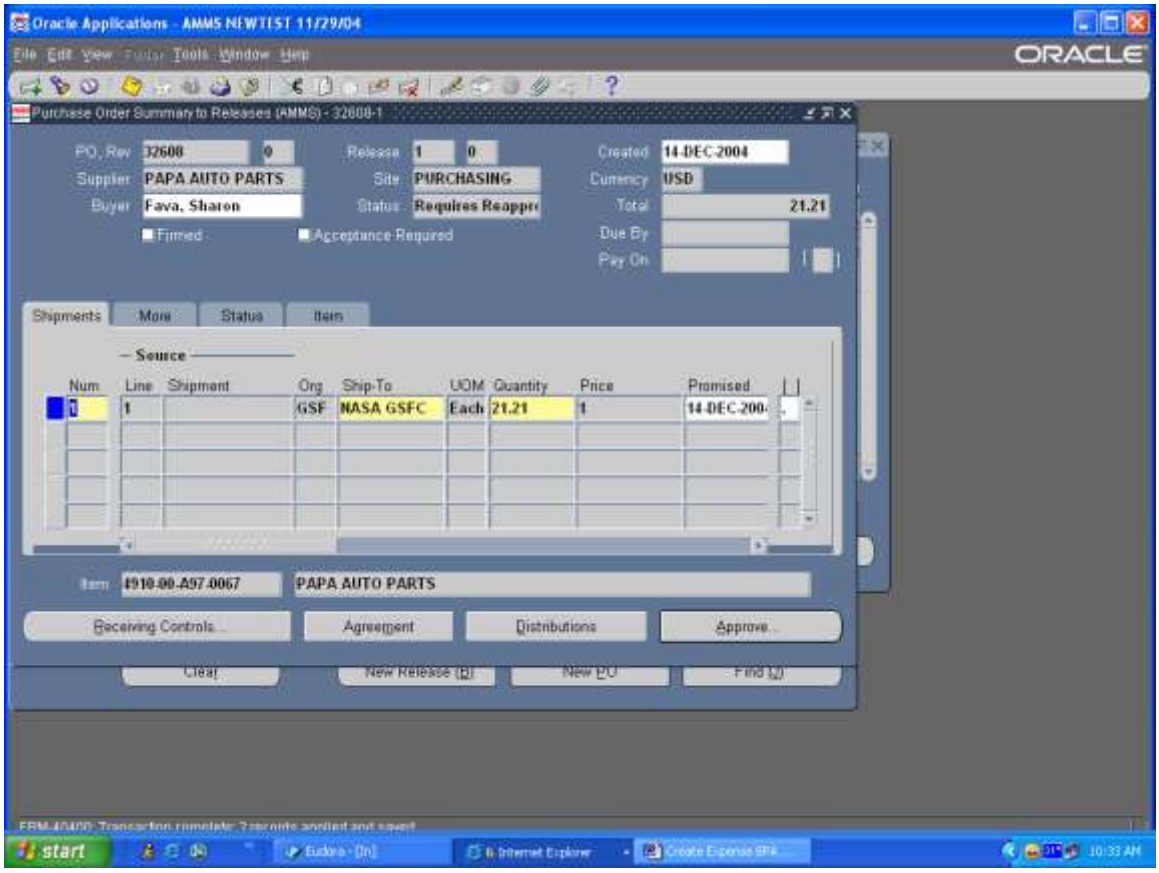
Step Description: Once you have entered a GL project number for each line on the release, Save your work

Expected Results: Transactions Saved and Applied



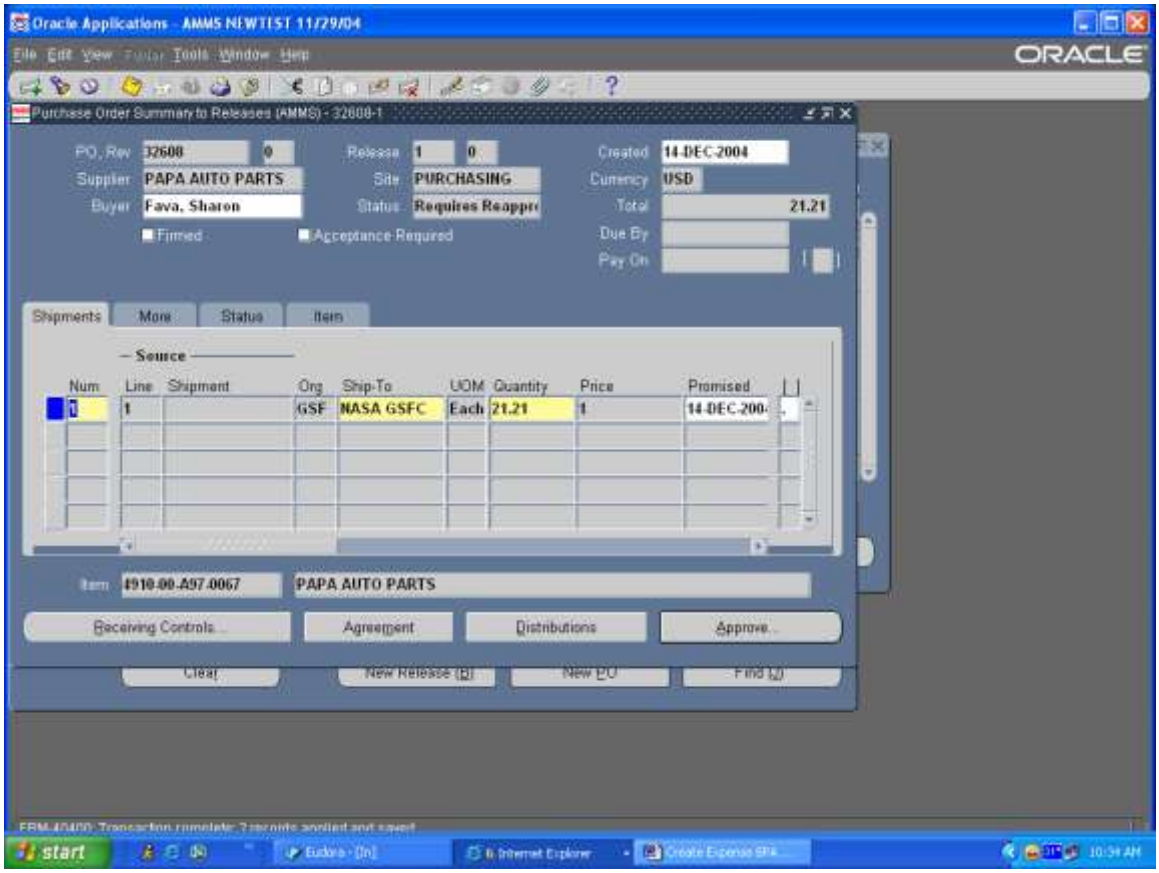
Step Description: Save your work

Expected Results: Transactions completed and Saved message



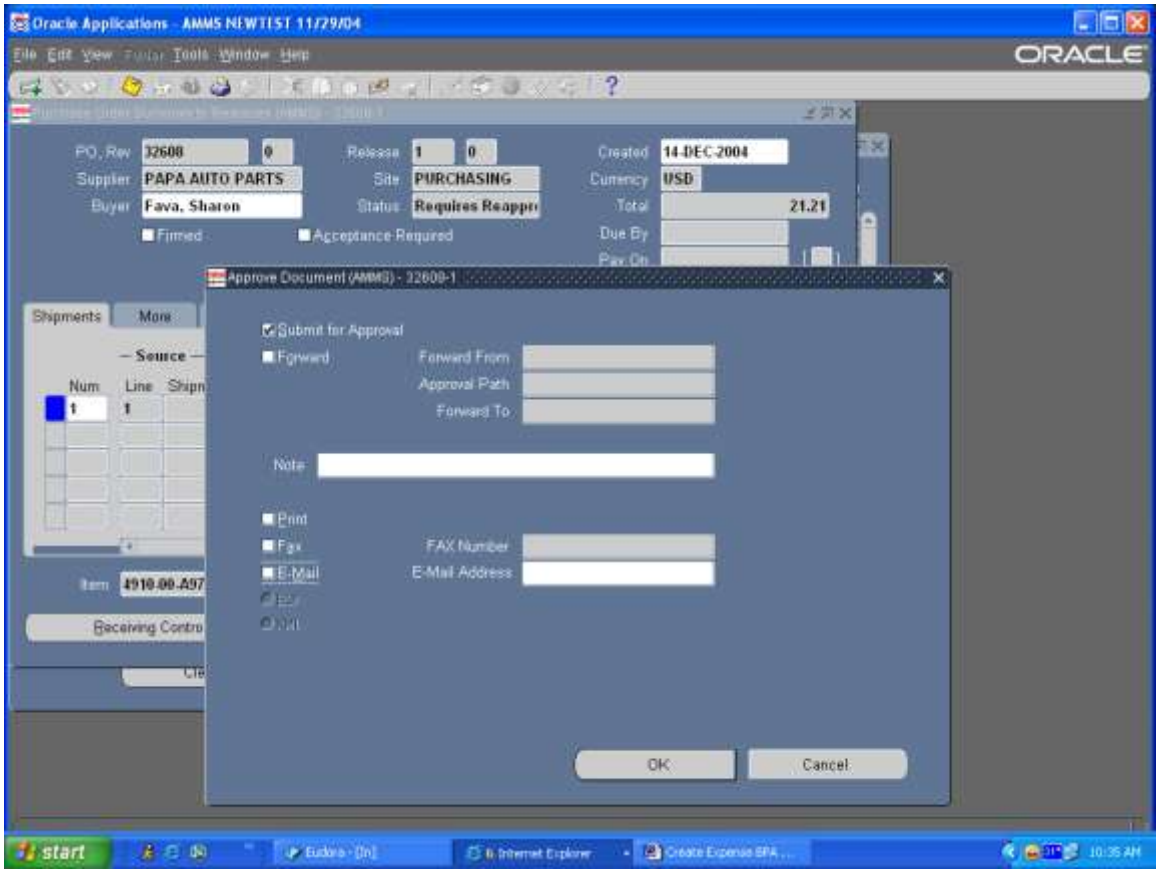
Step Description: Click on the Approve button at the bottom right of the screen

Expected Results: The Approval Documents window will open



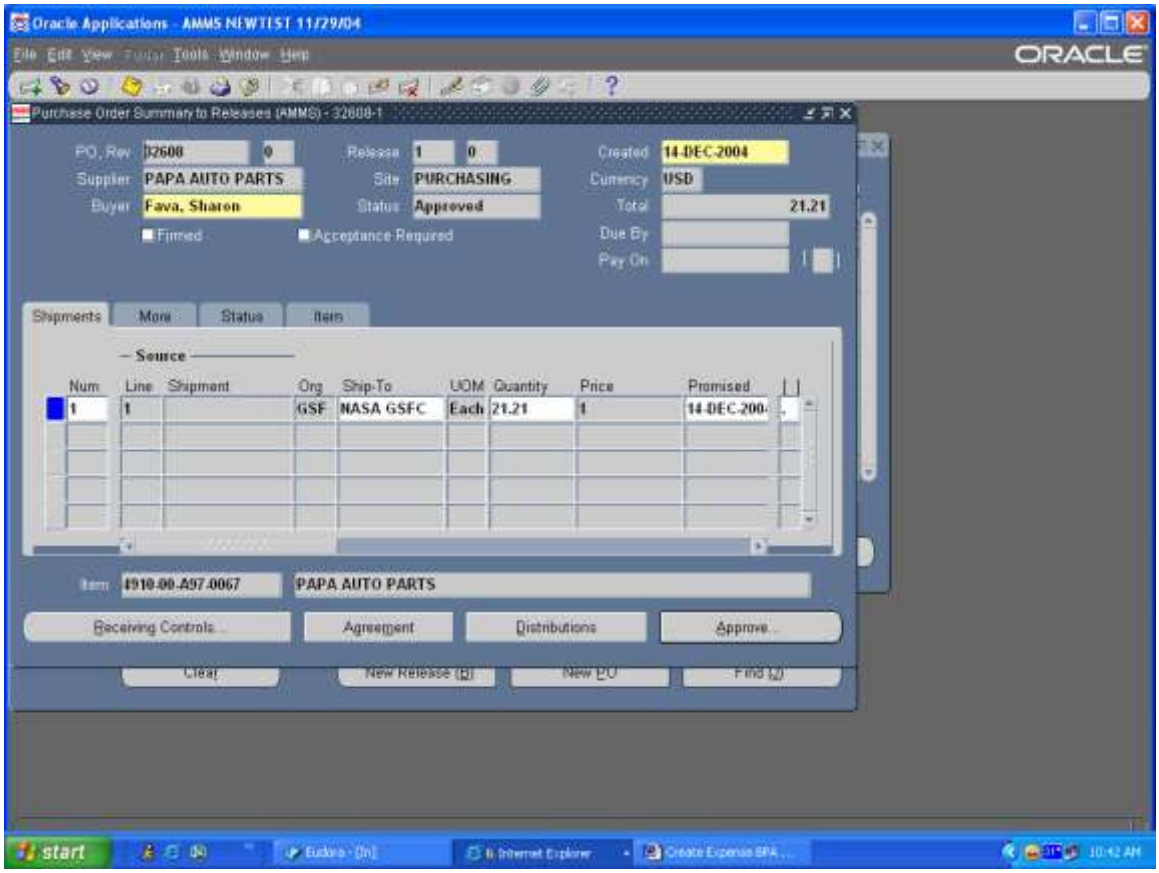
Step Description: Un-check the Email box, make sure that the Submit for Approval box is checked and click OK

Expected Results: A Note window will appear



Step Description: Click OK to the Note, Document has been submitted for Approval

Expected Results: Status on Release will say Approved



You have completed this process.

AMMS TRAINING SCRIPT
Create Expense BPA

Prepared by	Theresa Coulson
Author:	Theresa Coulson
Creation Date	12/14/04
Last Updated:	8/6/2009
Version:	3

Buyers _____

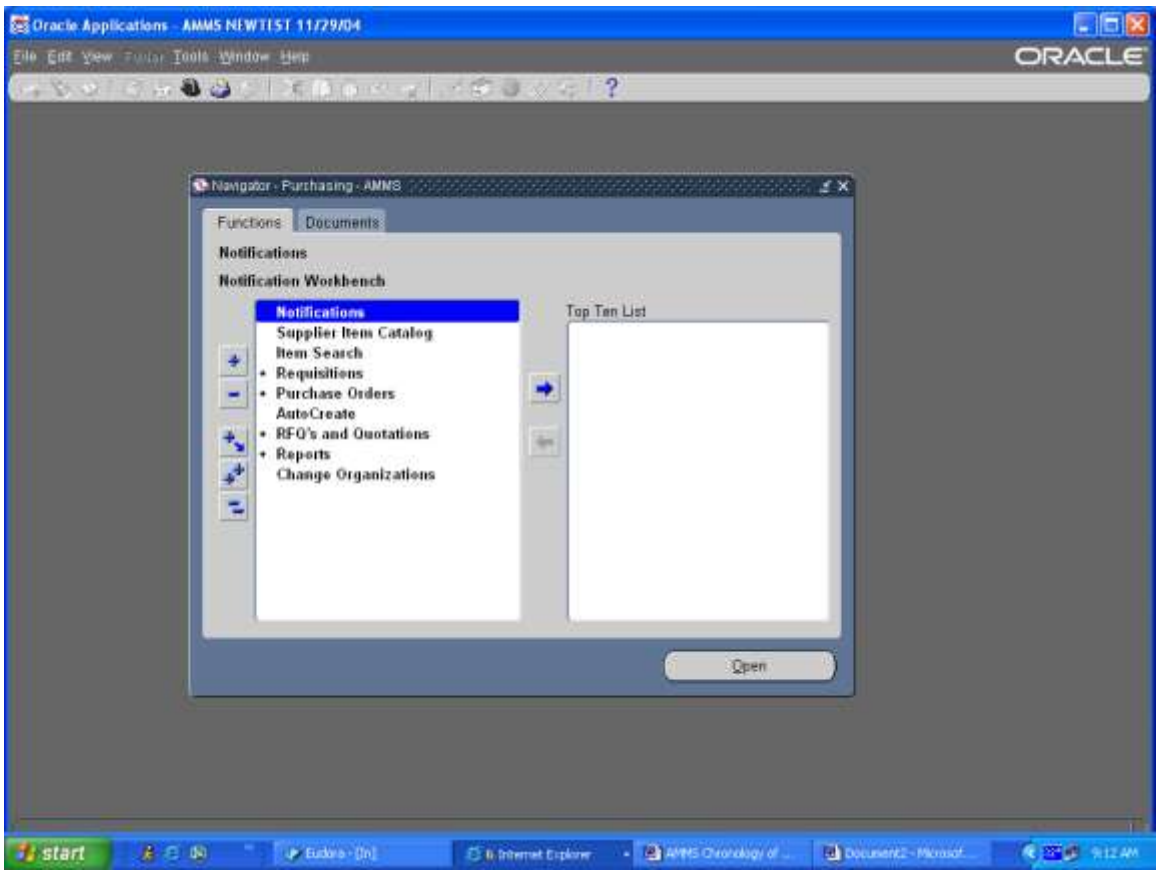
_____

_____

_____

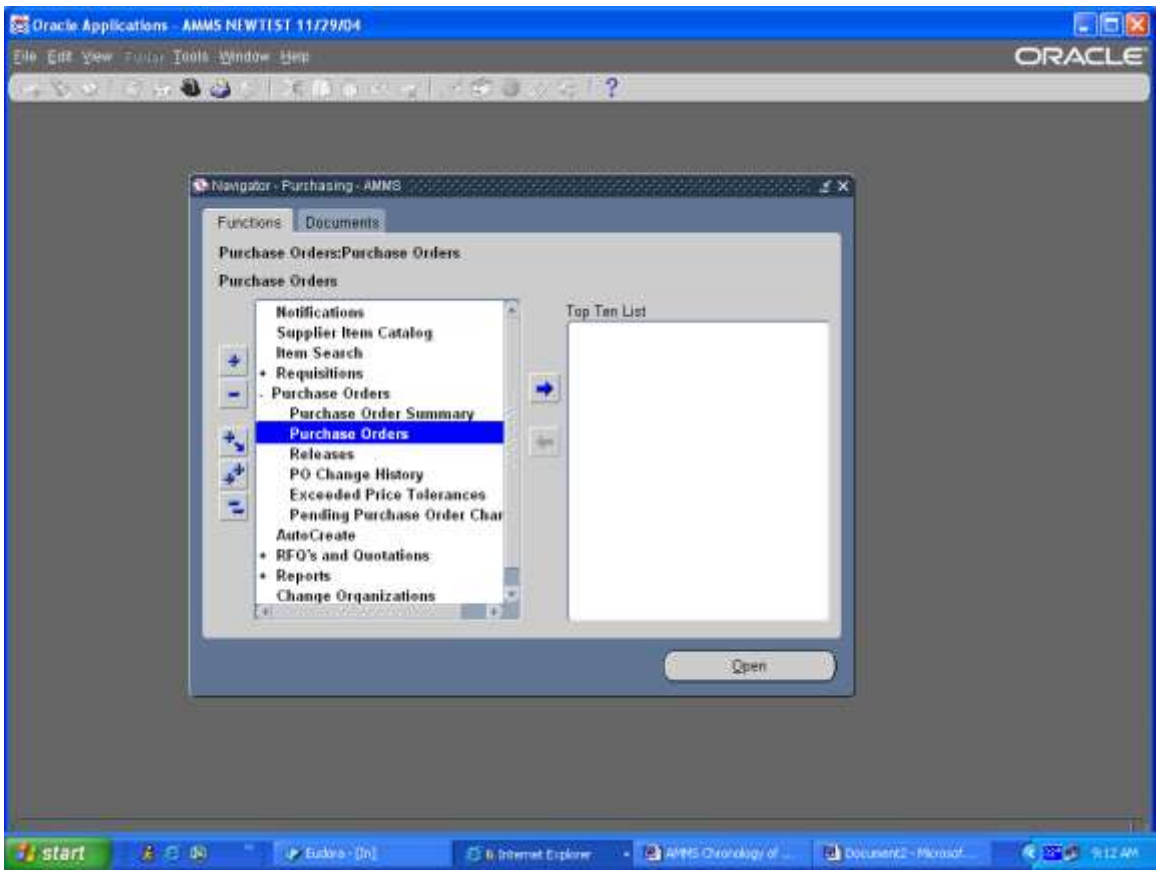
Step Description: Sign onto Oracle and select the Purchasing AMMS responsibility

Expected Results: Purchasing AMMS main menu will appear



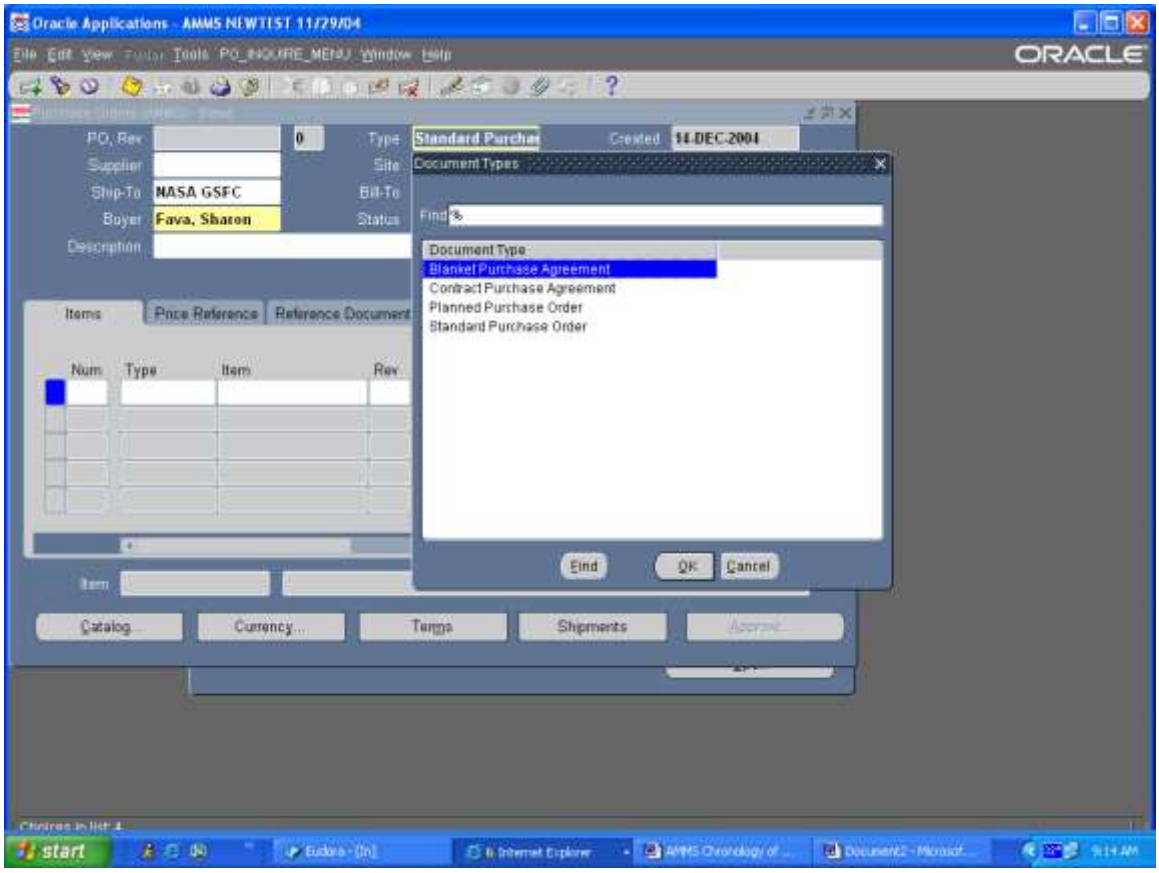
Step Description: From the Purchasing AMMS main menu select Purchase Orders > Purchase Orders click on Open

Expected Results: The Purchase Order AMMS window will open



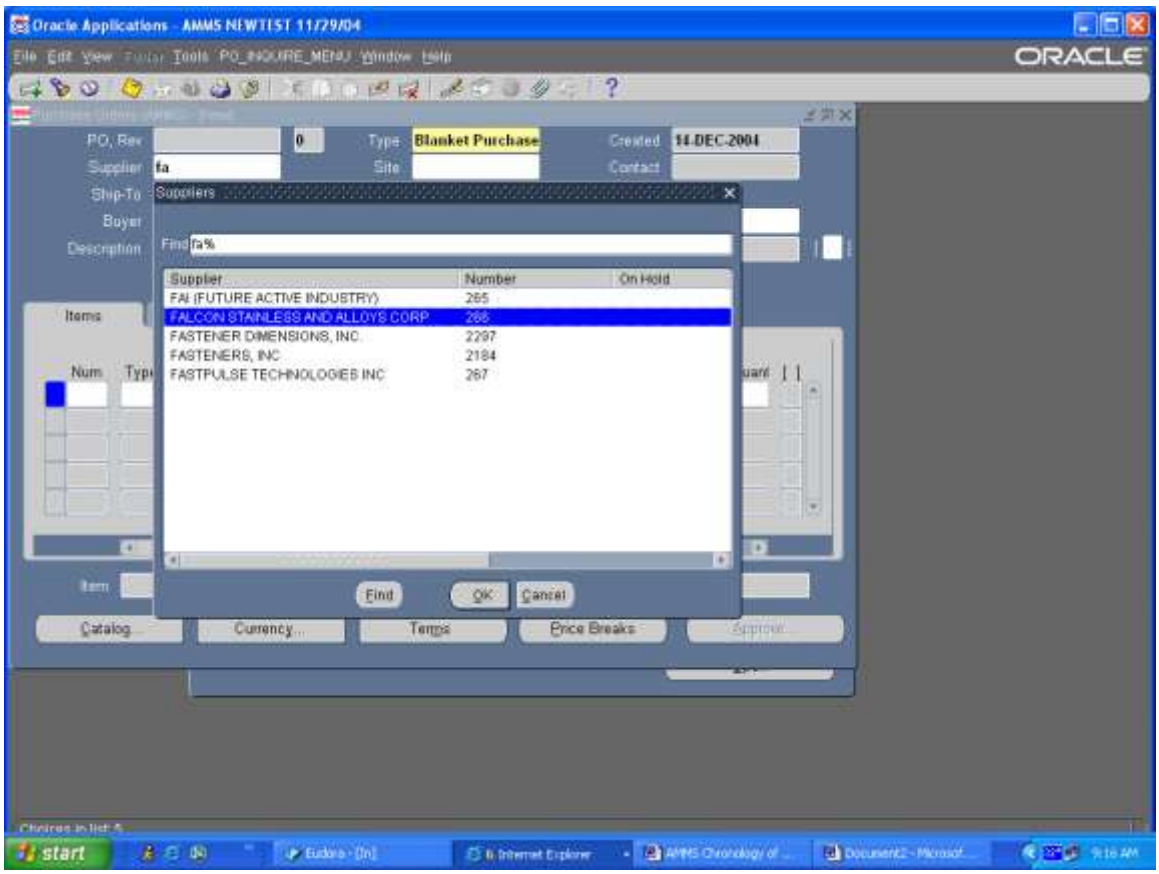
Step Description: In the Type field click on the LOV and select Blanket Purchase Agreement from the menu

Expected Results: Field will be populated with Blanket Purchase Agreement



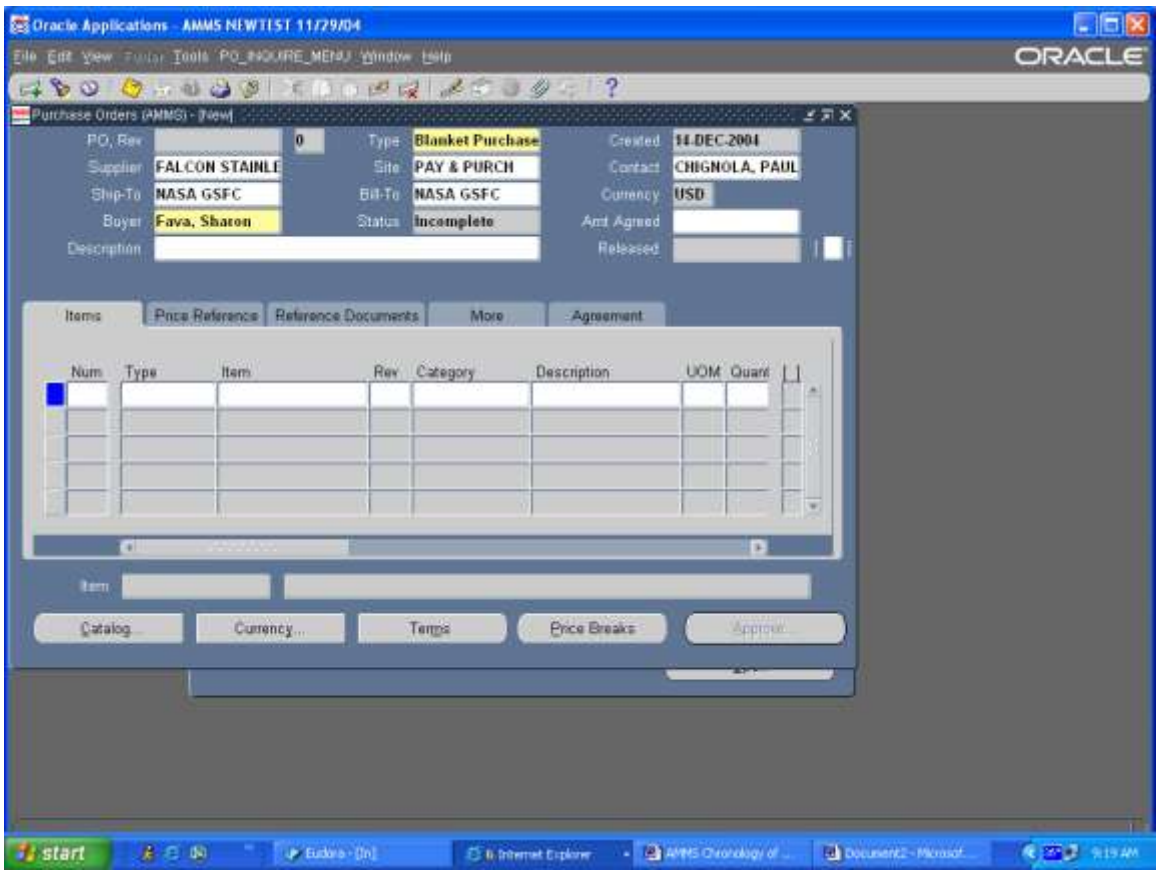
Step Description: At the Supplier field click on the LOV and select the Supplier for this BPA

Expected Results: Supplier field will be populated with vendor name



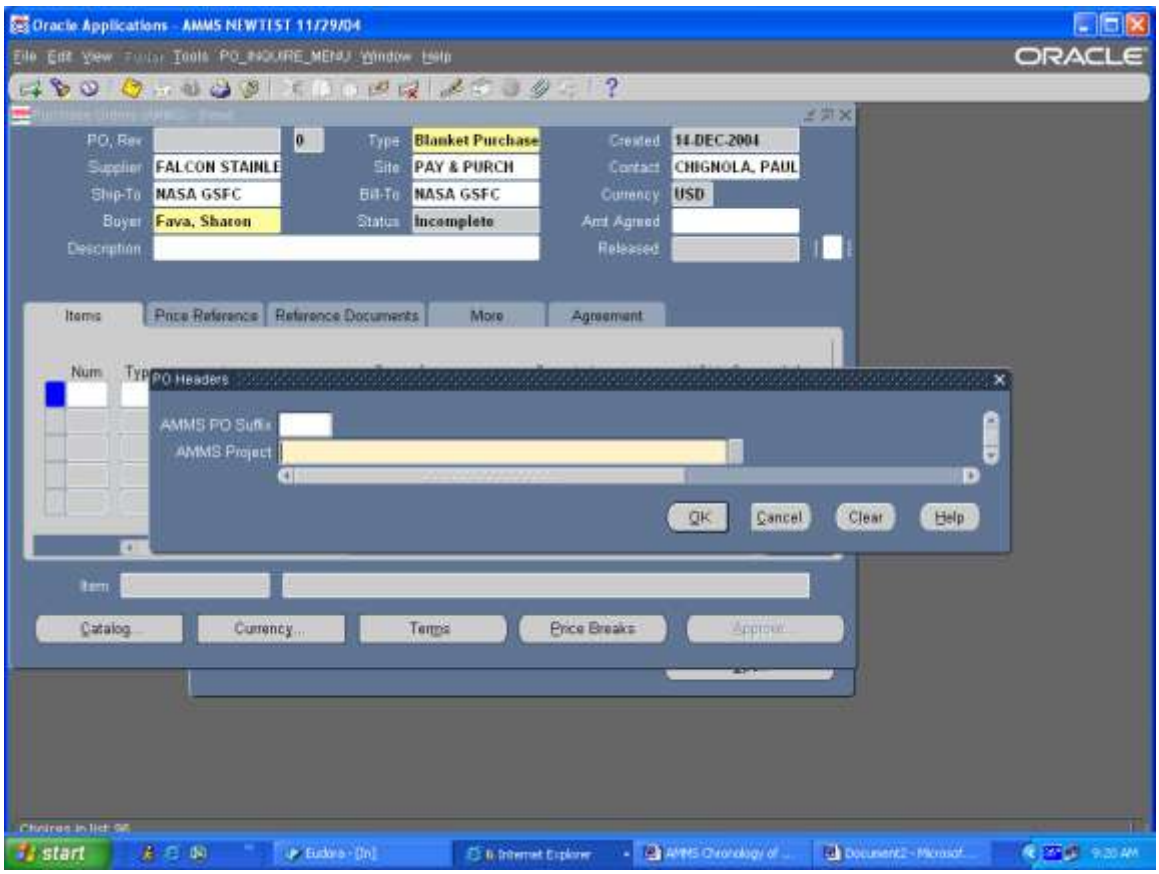
Step Description: In the Descriptive Flex Field for the GL number, field has [ ], click in this field to open PO Headers window

Expected Results: PO Headers window will open



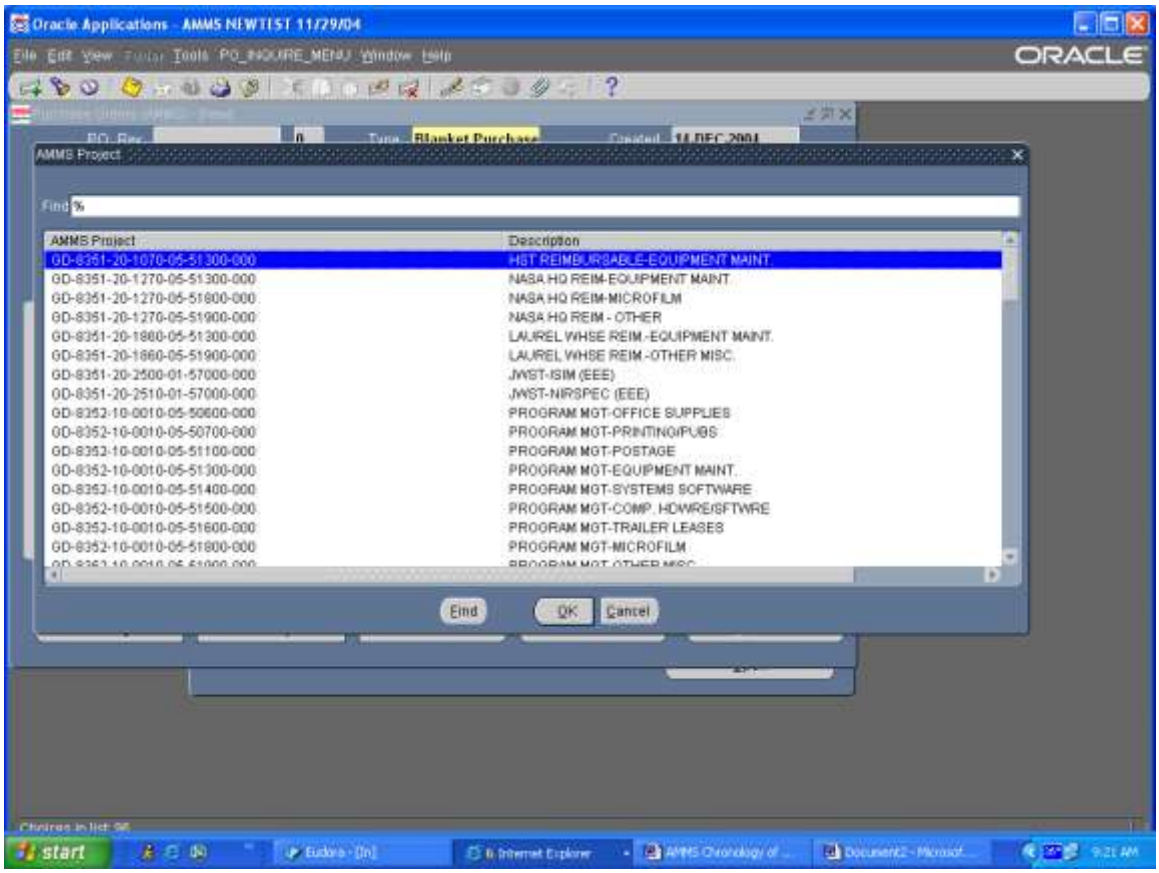
Step Description: In the PO Headers window if the PO has a Suffix enter that information. In the AMMS Project field click on the LOV.

Expected Results: A list of GL account numbers will appear



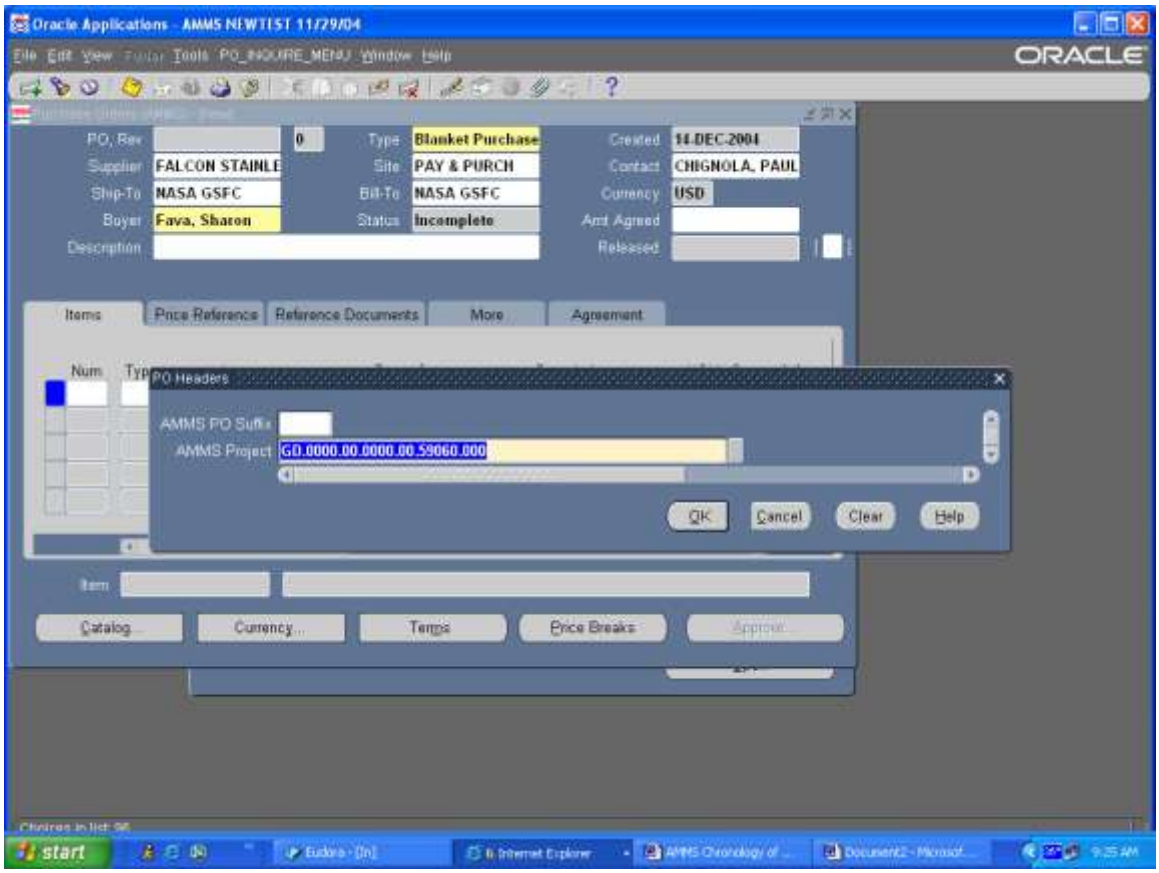
Step Description: From the GL menu select the appropriate GL number

Expected Results: The AMMS project field will be populated



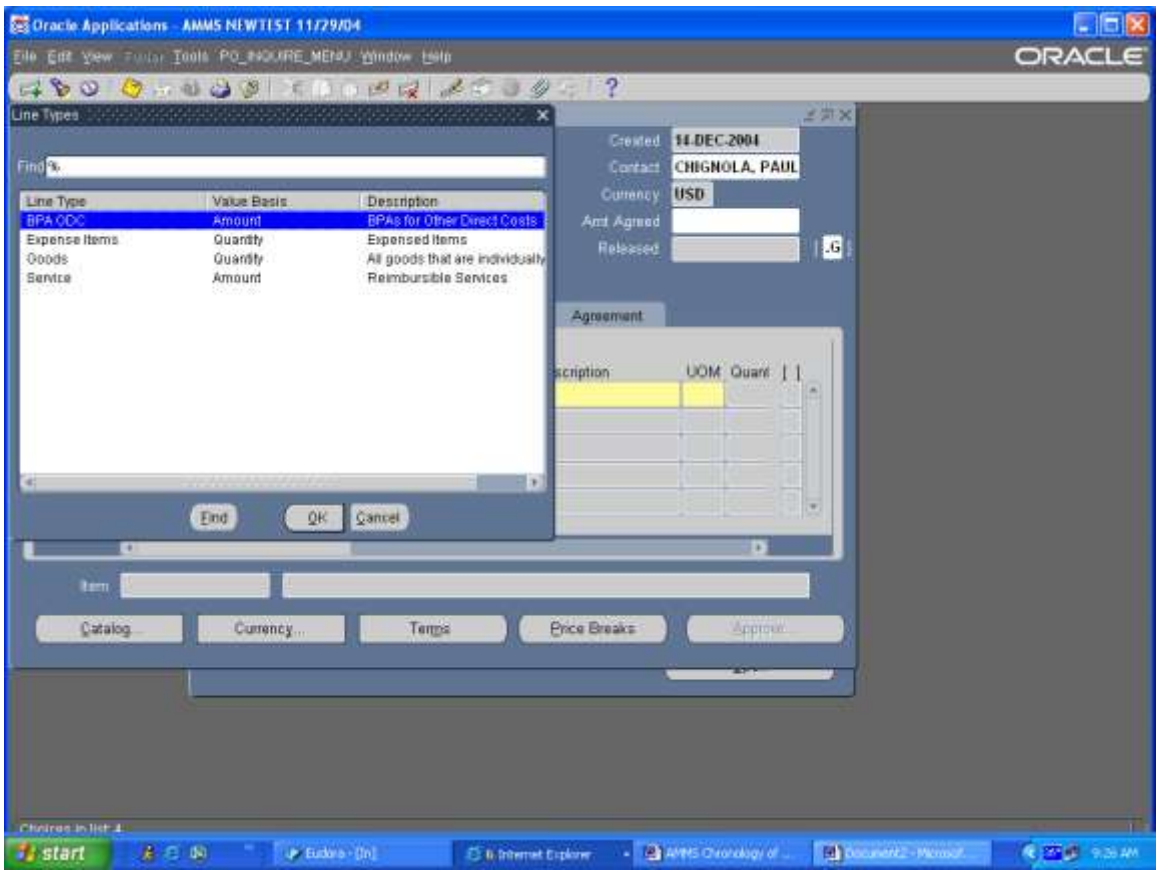
Step Description: Click OK to the PO Headers window

Expected Results: Will return to the Purchase Order window



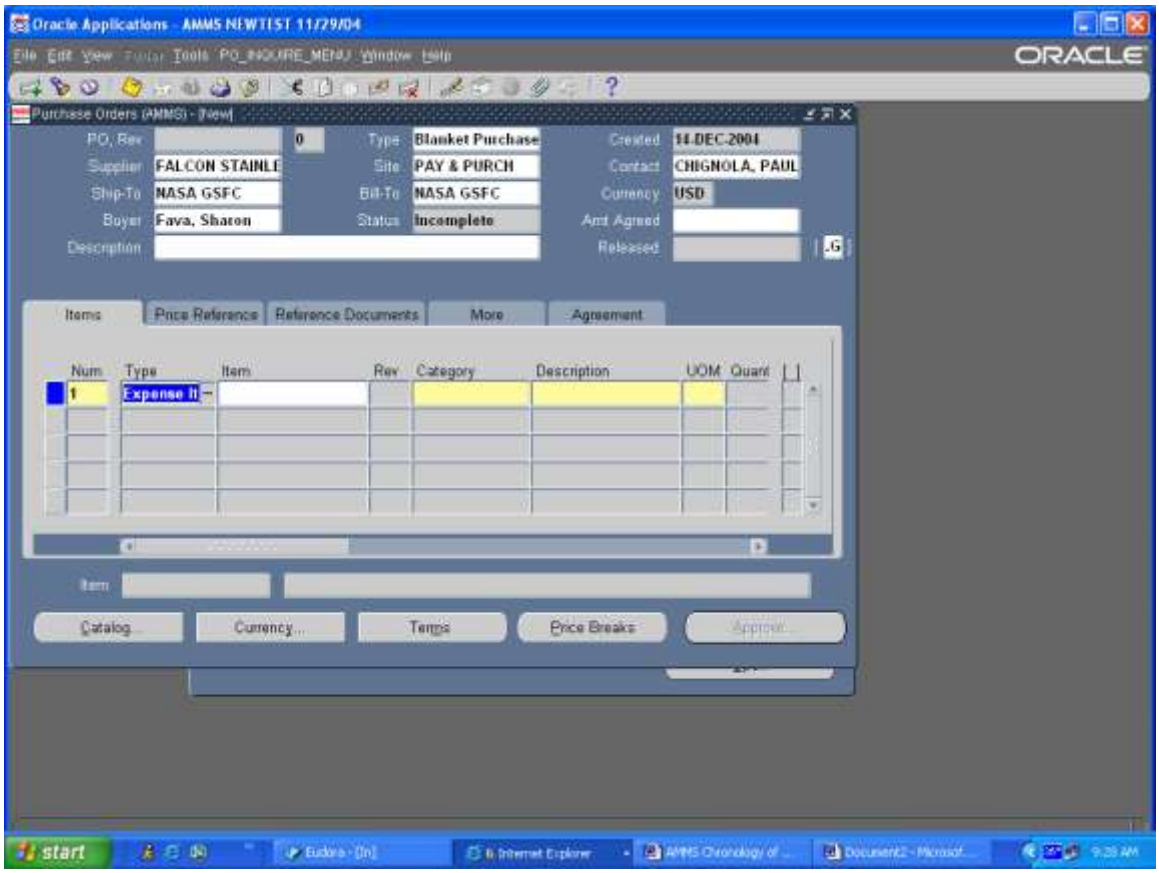
Step Description: At the Items tab at the bottom of the screen in the Type field click on the LOV

Expected Results: Line Type menu will appear



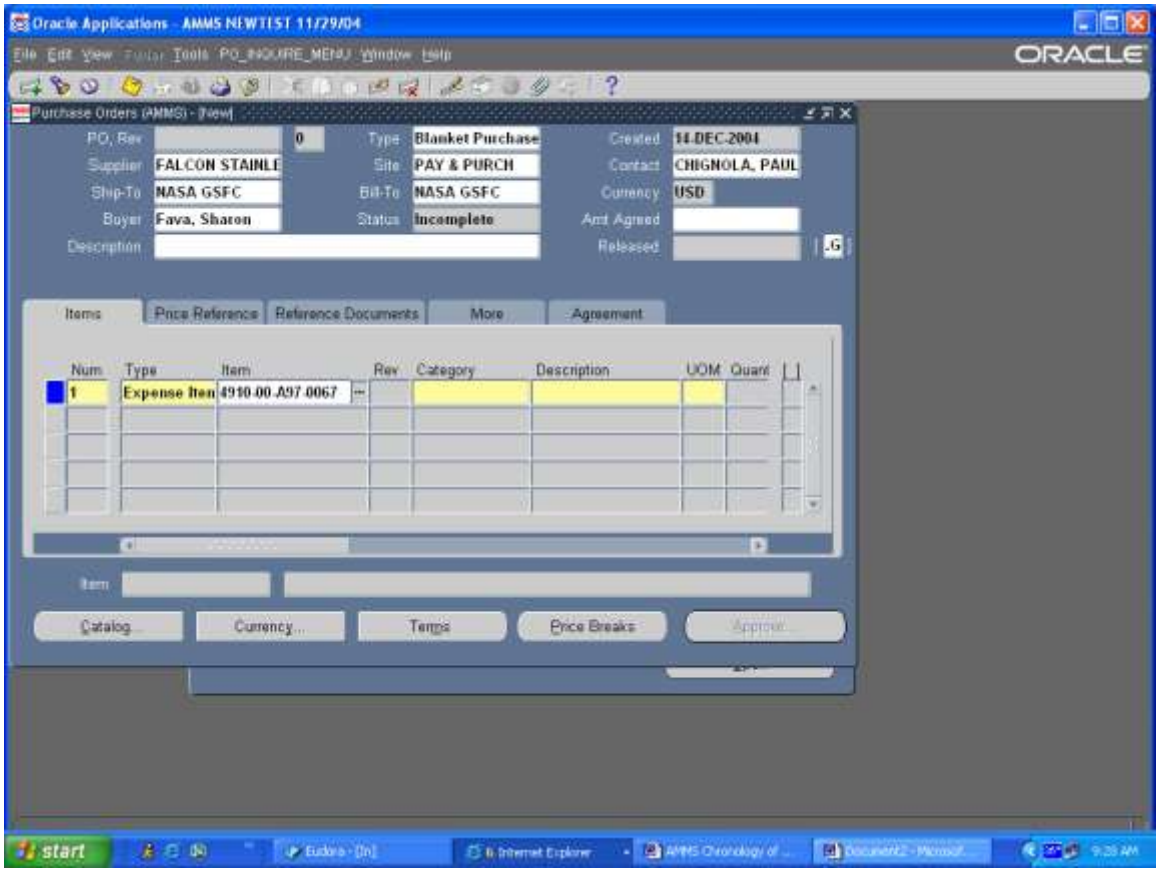
Step Description: From the Line Type menu select Expense Items

Expected Results: Line Type will change from Goods to Expense



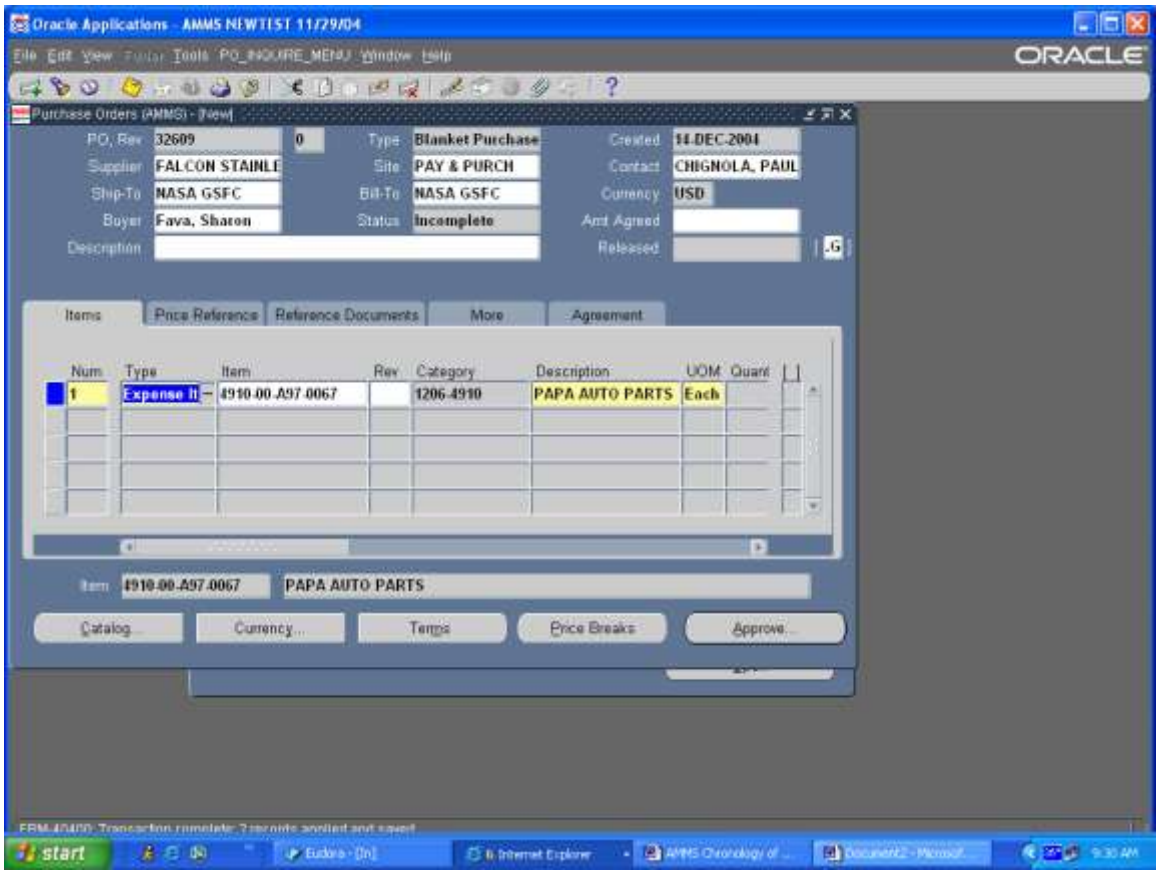
Step Description: Tab to the Item field and enter the item number. If this is an “Across the Contract” purchase no Item Number is needed, the Category should say None-None

Expected Results: Field will be populated



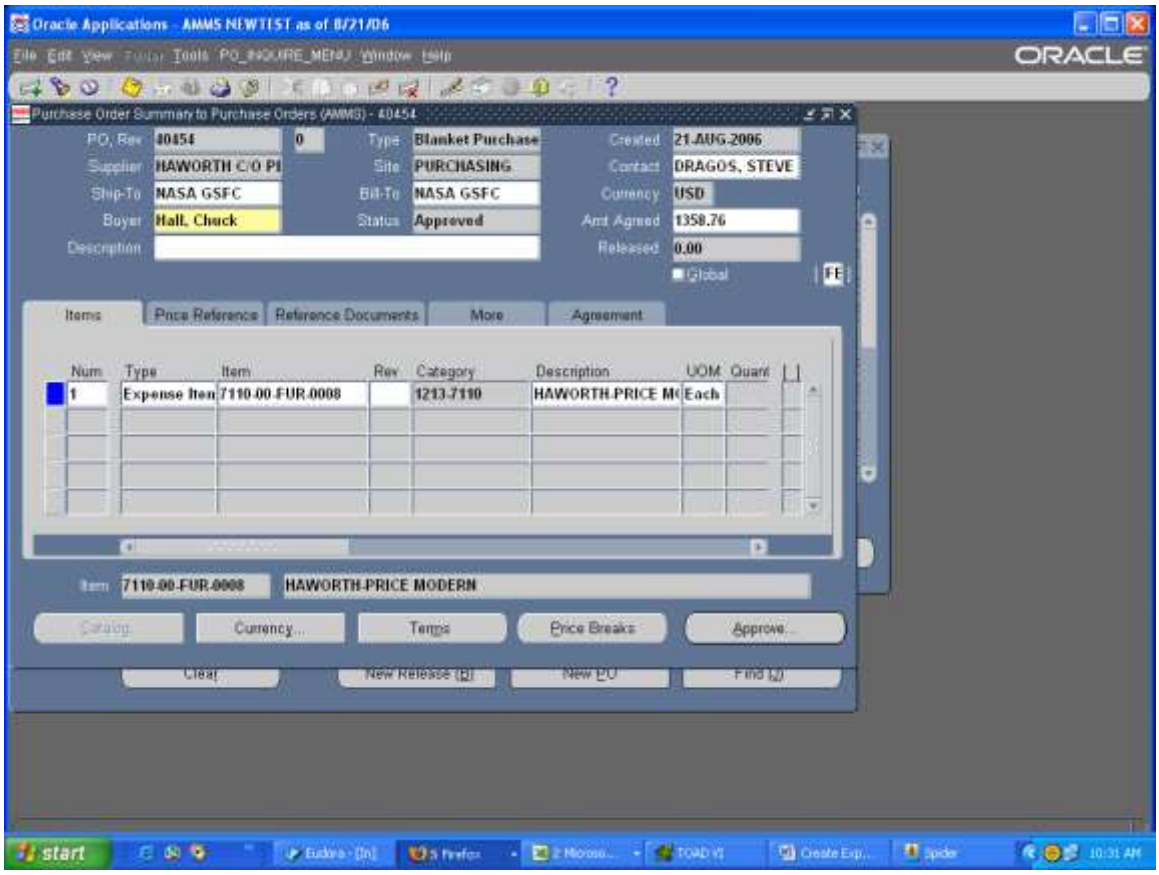
Step Description: Save your work

Expected Results: Transaction Complete message



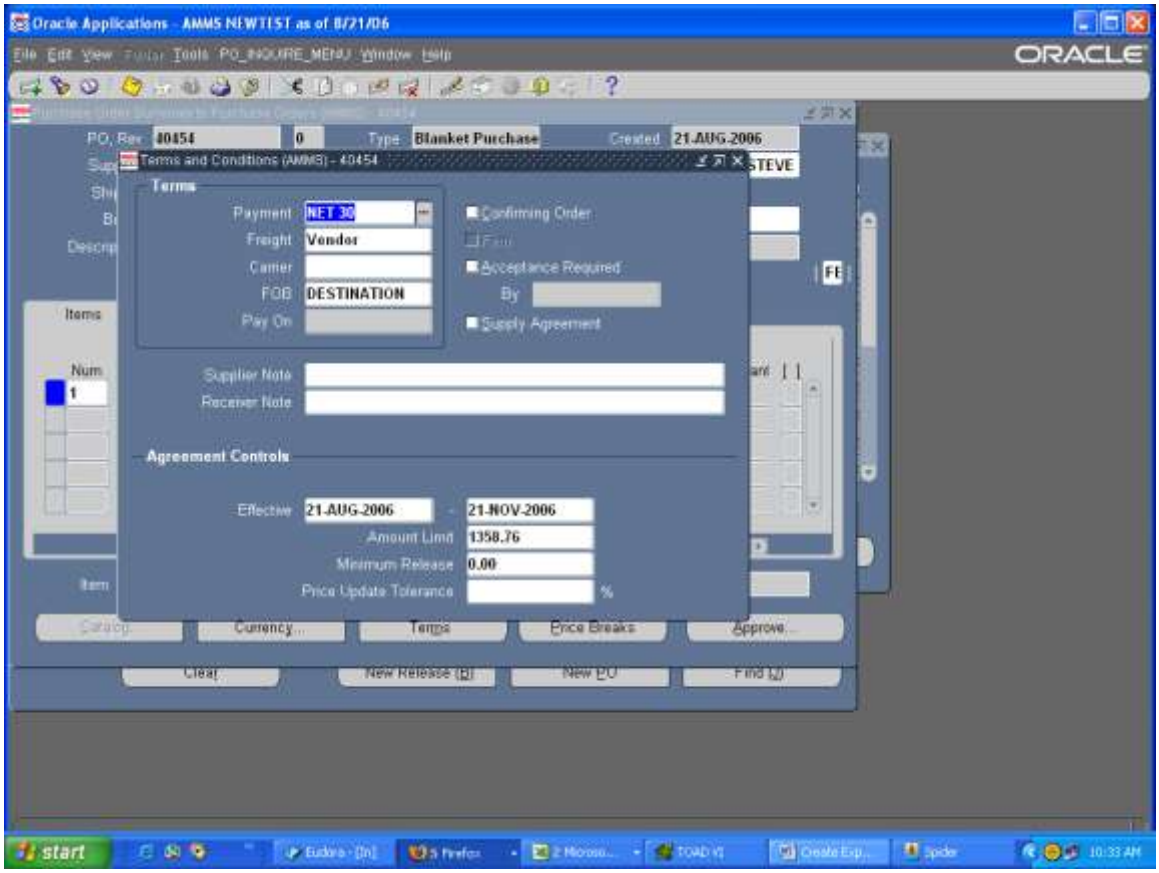
Step Description: Click on the Terms button

Expected Results: Terms and Conditions window will appear



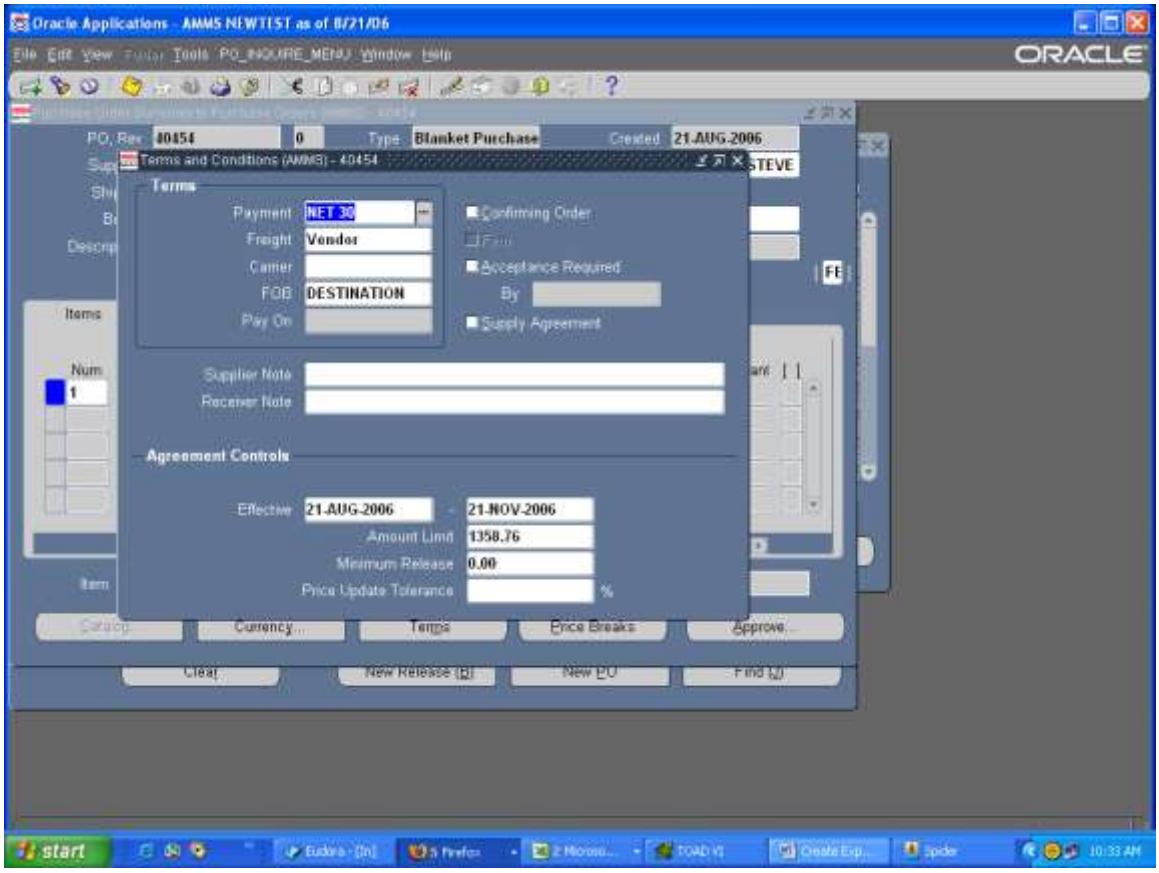
Step Description: In the Terms and Conditions window enter your Effective Dates, and your Amount Limit. Save your work

Expected Results: Field populated, Transaction Saved and Applied message



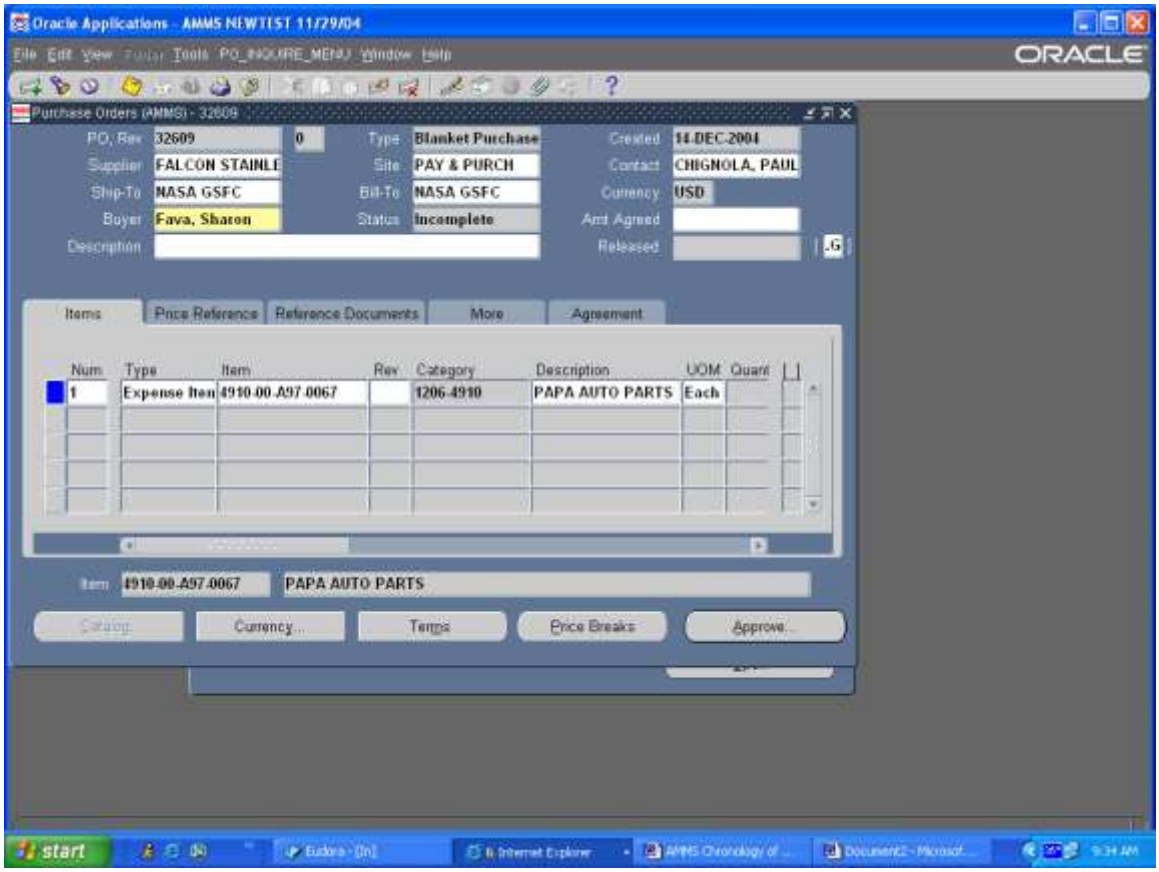
Step Description: Close the Terms and Conditions window

Expected Results: Return to Purchase Order Summary window



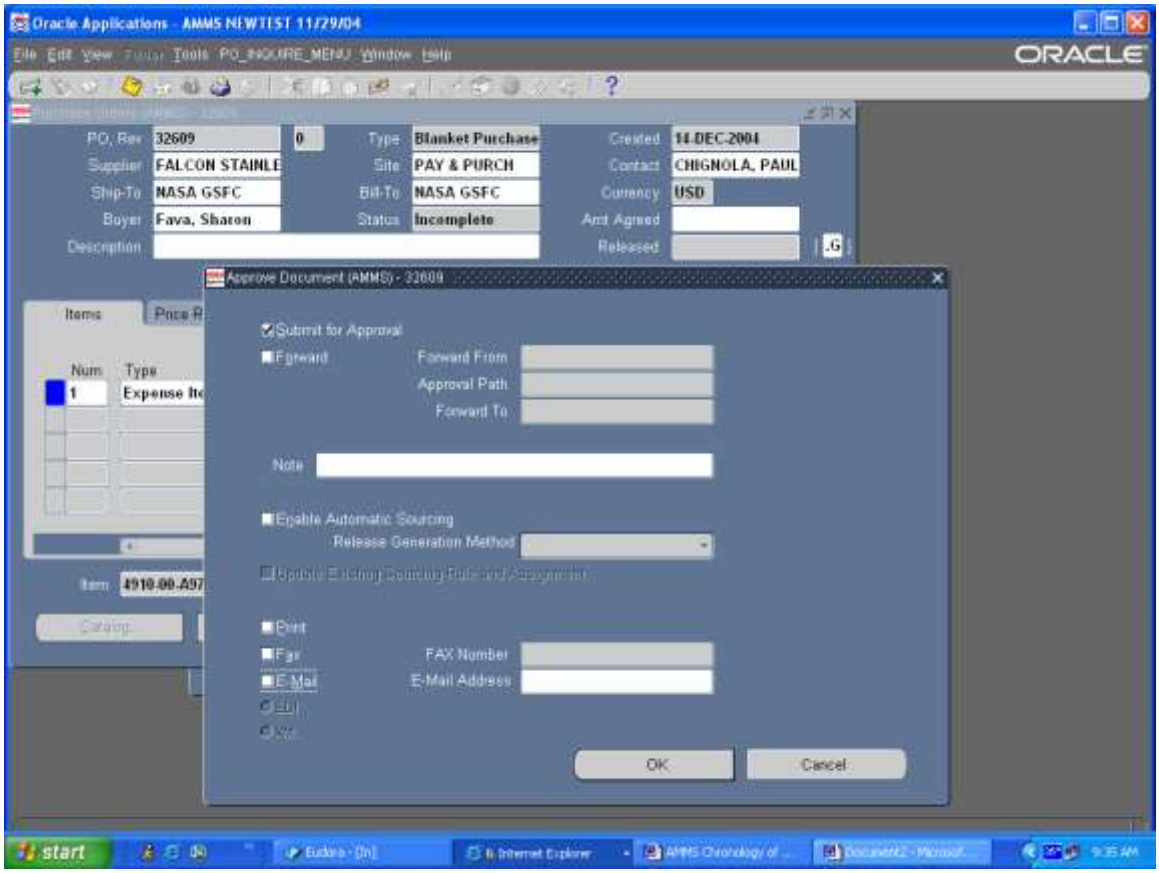
Step Description: Click on the Approve button at the bottom right of the screen

Expected Results: The Approve Documents window will open



Step Description: Remove the check mark from the Email box, make sure the Submit for Approval box is checked, then click OK

Expected Results: A note window will appear



Step Description: Click OK to the Note window telling you Document has been submitted for Approval

Expected Results: Window will close and status on Purchase order will change from Incomplete to Approved

Expense BPA is created.

AMMS TRAINING SCRIPT
Generate Manual Requisitions

Purpose

The purpose of this training script is to show how to create a purchasing requsition

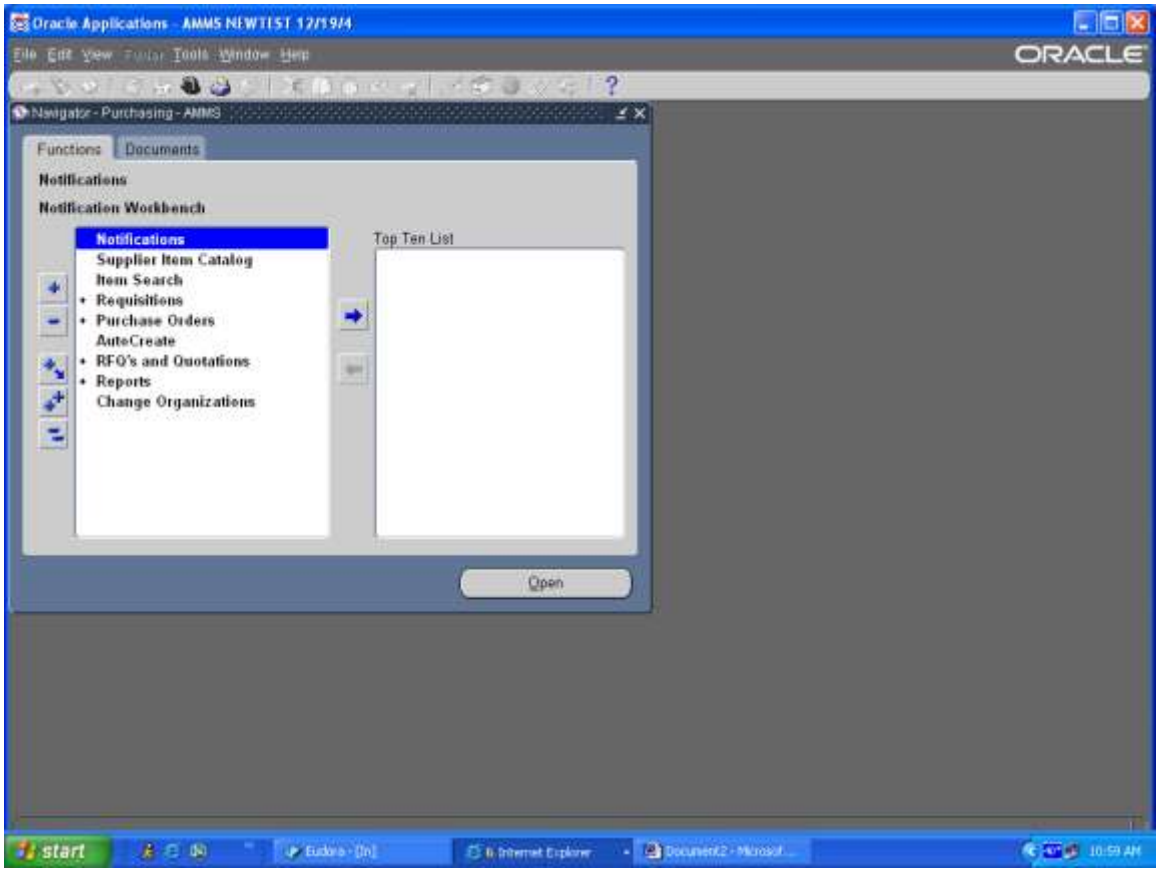
Audience

Material Coordinators, Supply Technician Leads

Prepared By	Theresa Coulson
Creation Date:	01/10/2005
Document Name	Create Manual Requisitions.doc
Version	2
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Purchasing.	

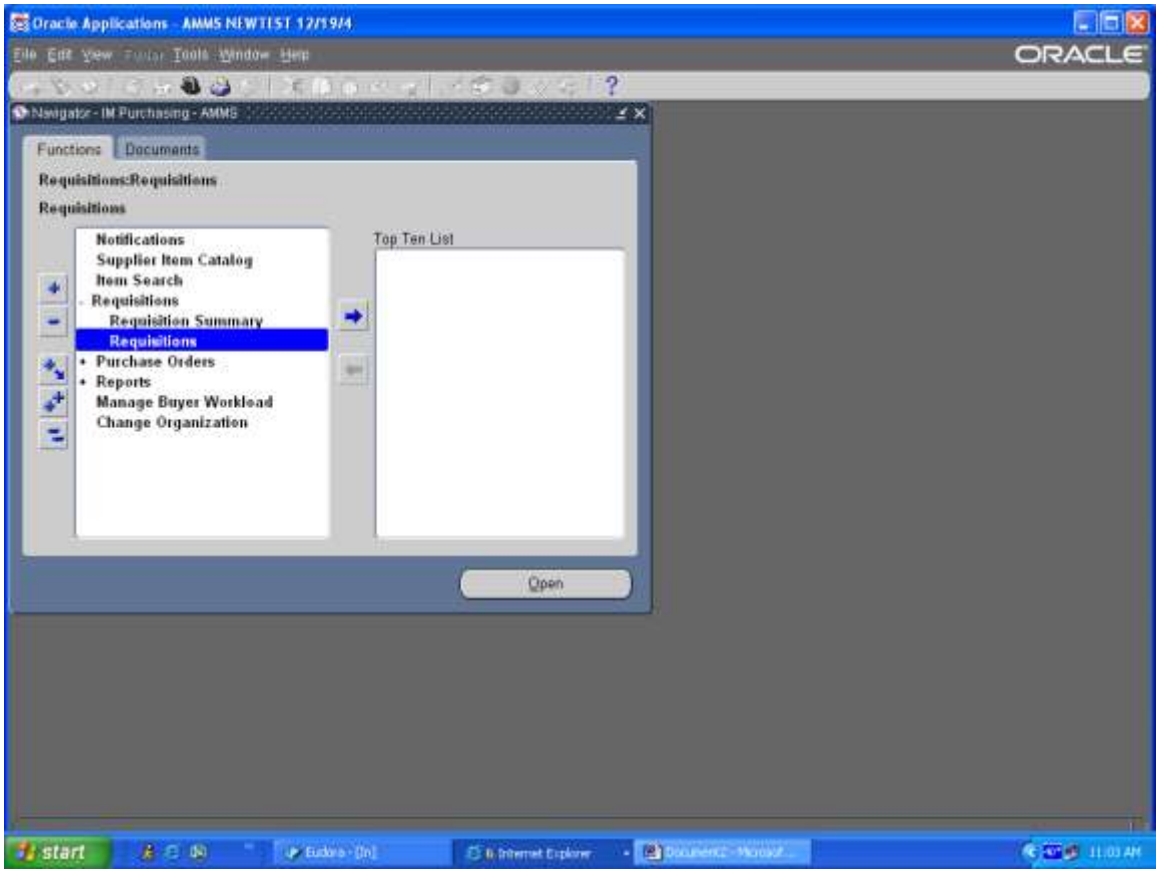
Step Description: Sign onto Oracle and select the IM Purchasing AMMS responsibility

Expected Results: IM Purchasing AMMS main menu will appear



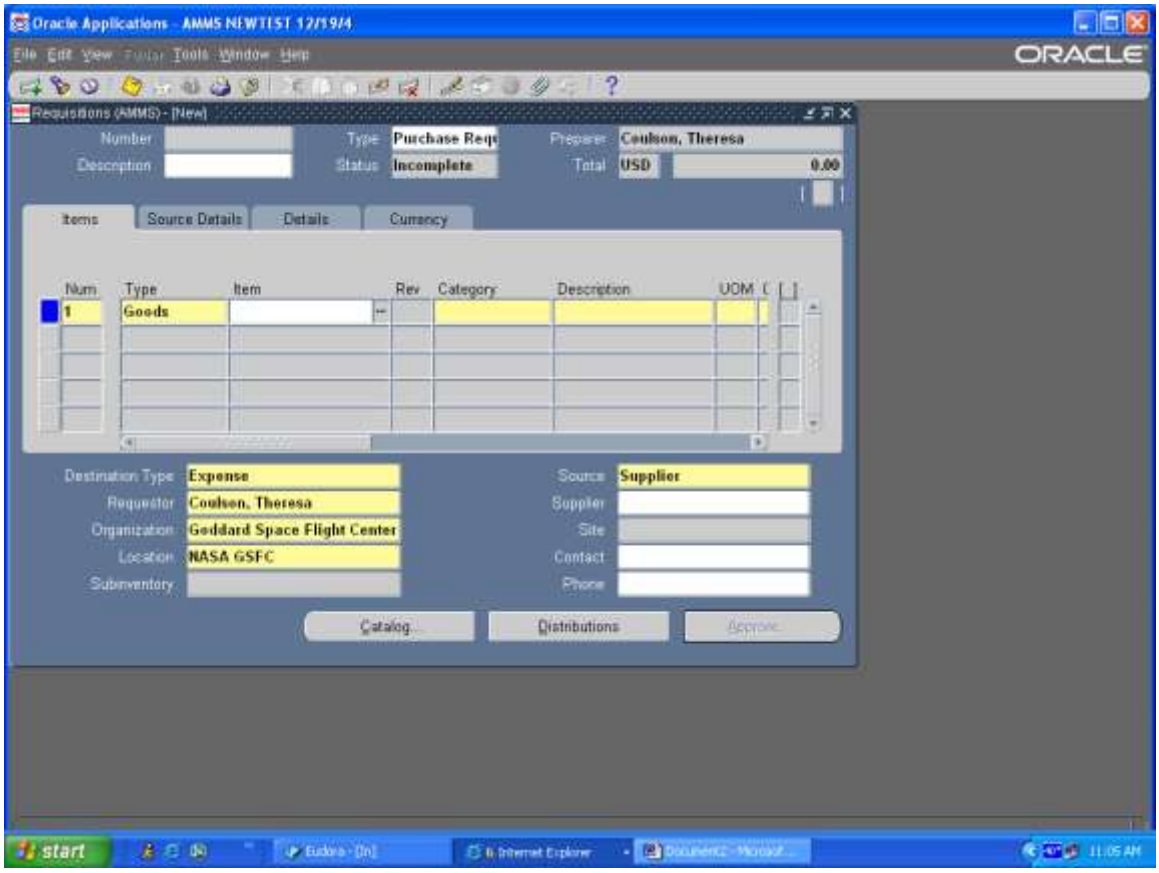
Step Description: From the IM Purchasing AMMS main menu select Requisitions > Requisitions, click on the Open button

Expected Results: The Requisition AMMS New window will appear



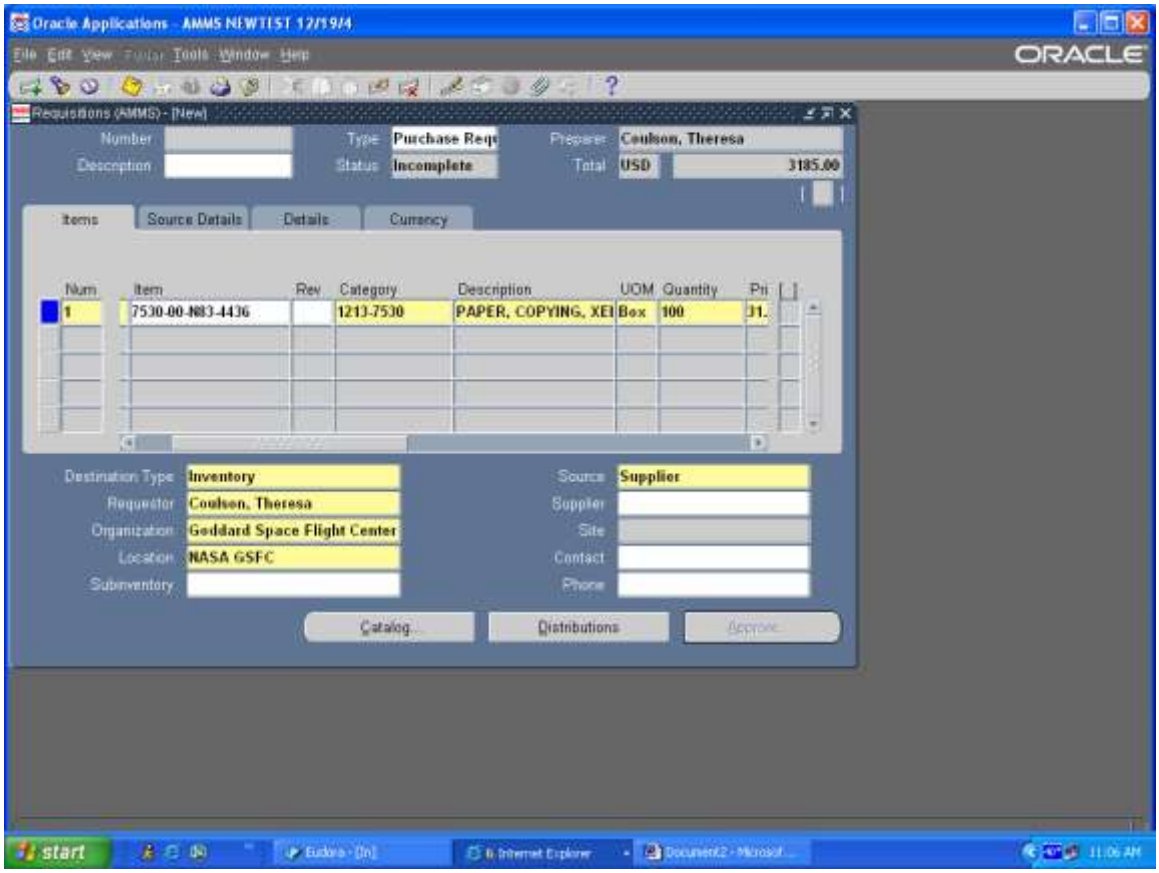
Step Description: Click in the Item field and enter the stock number

Expected Results: Field will be populated



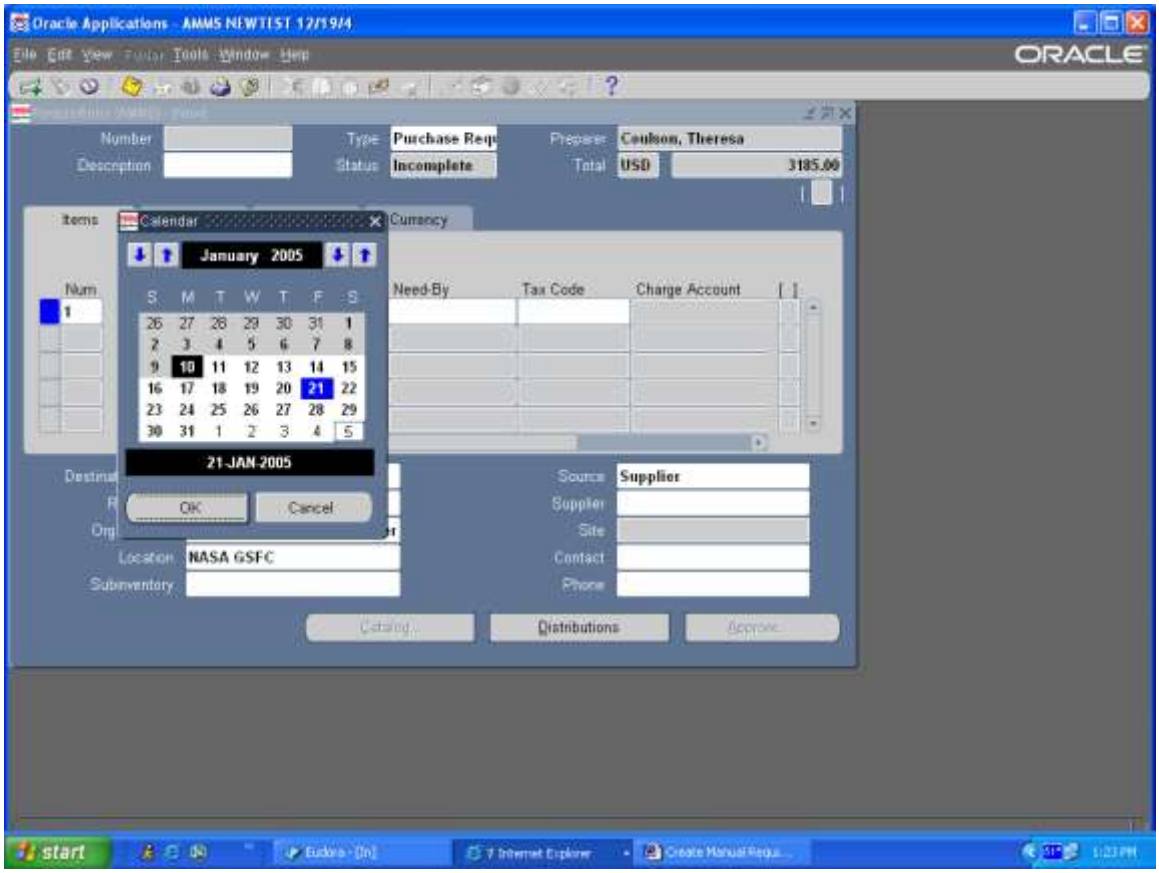
Step Description: Tab to the quantity field, Category, Description and UOM will default. In the quantity field enter your quantity.

Expected Results: Field will be populated



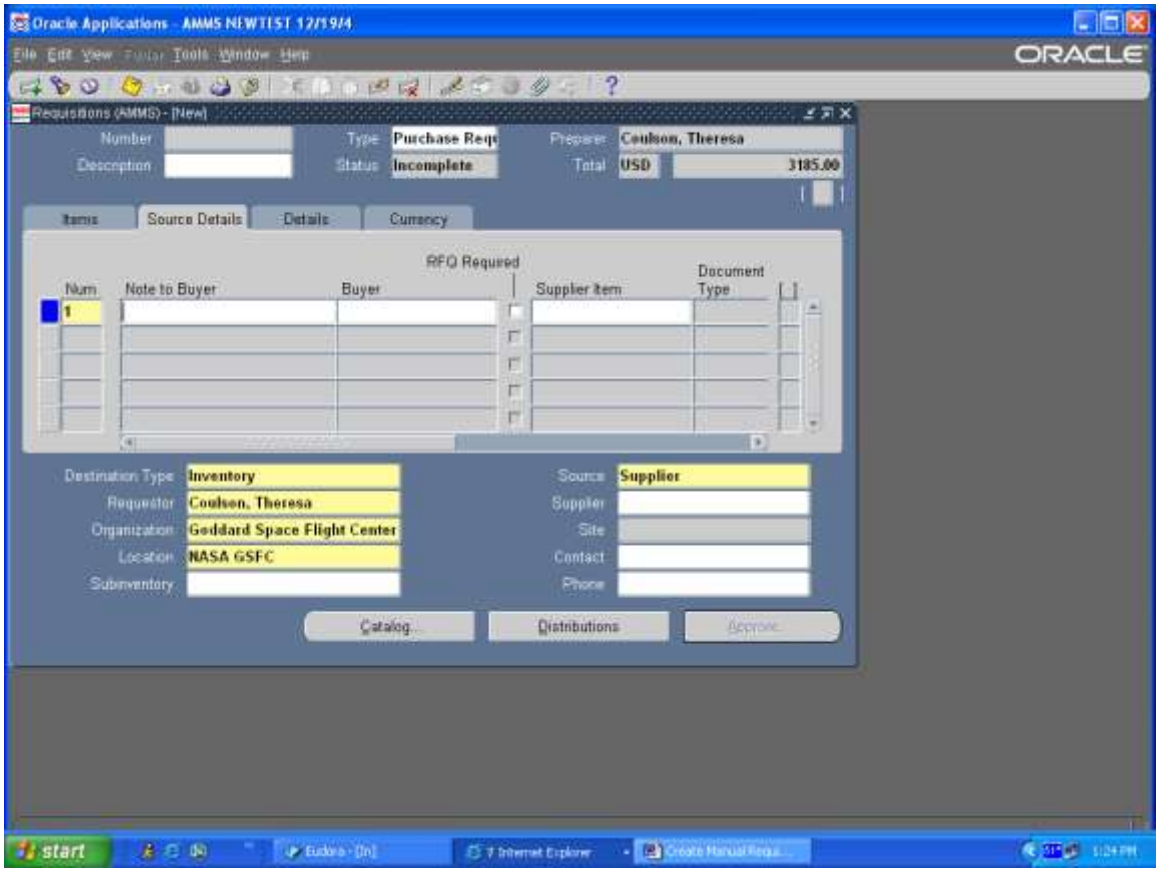
Step Description: Tab to the Need By field, click on the LOV and select a date from the calendar, this date will populate the Need by field

Expected Results: Field is populated.



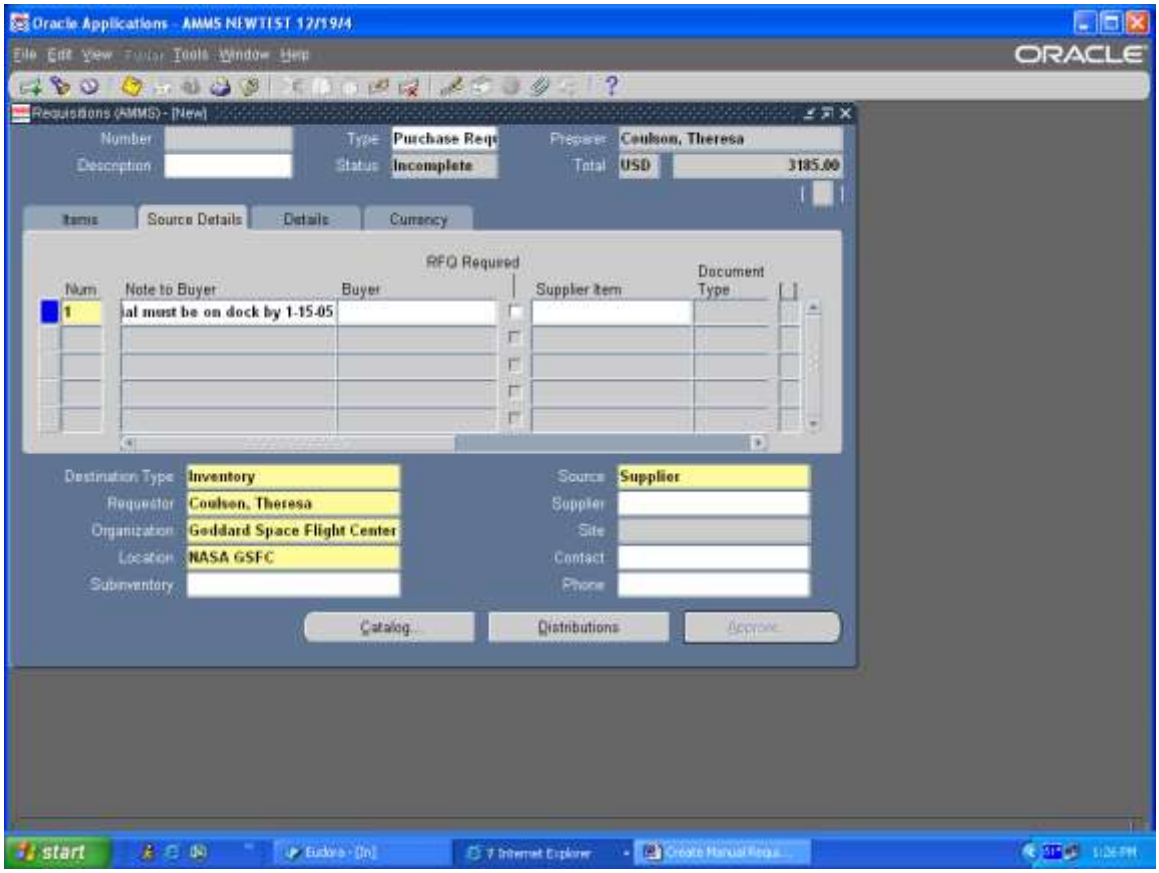
Step Description: Click on the Source Details tab.

Expected Results: Window view will change



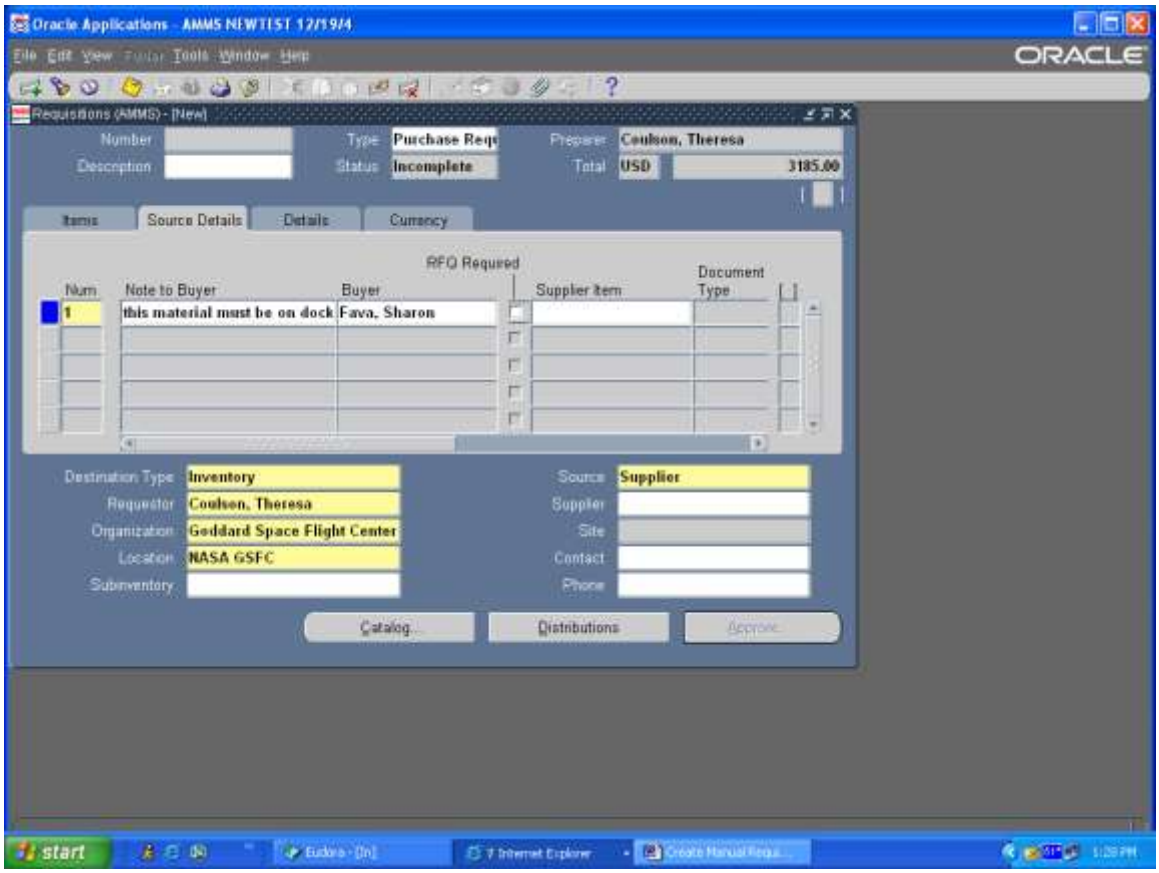
Step Description: If you need to put Notes to the buyer, type in the Note to Buyer field. This is a free form field.

Expected Results: Field will be populated.



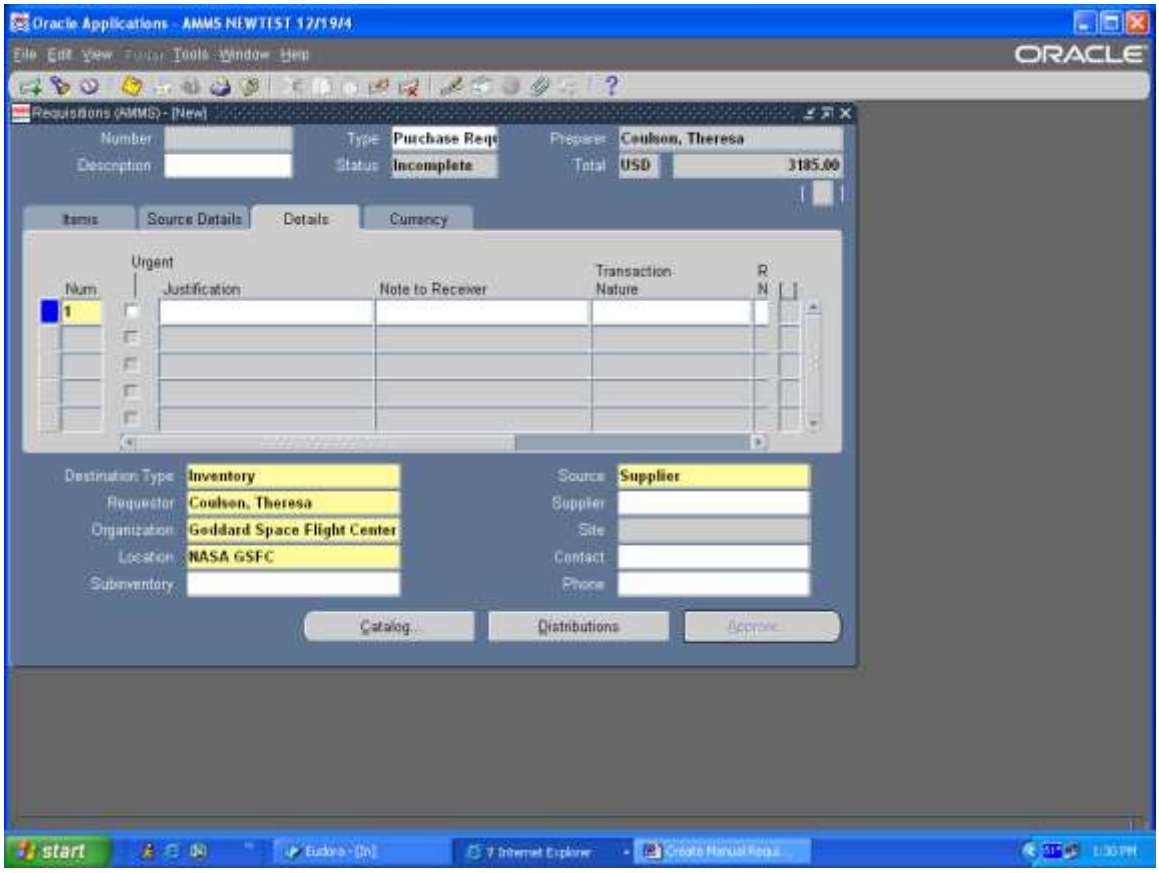
Step Description: Tab to the Buyer field, if a default buyer already exists for this item this field will be populated. If the field is blank, click on the LOV and select the buyer to assign to this requisition.

Expected Results: Field will be populated with buyer name.



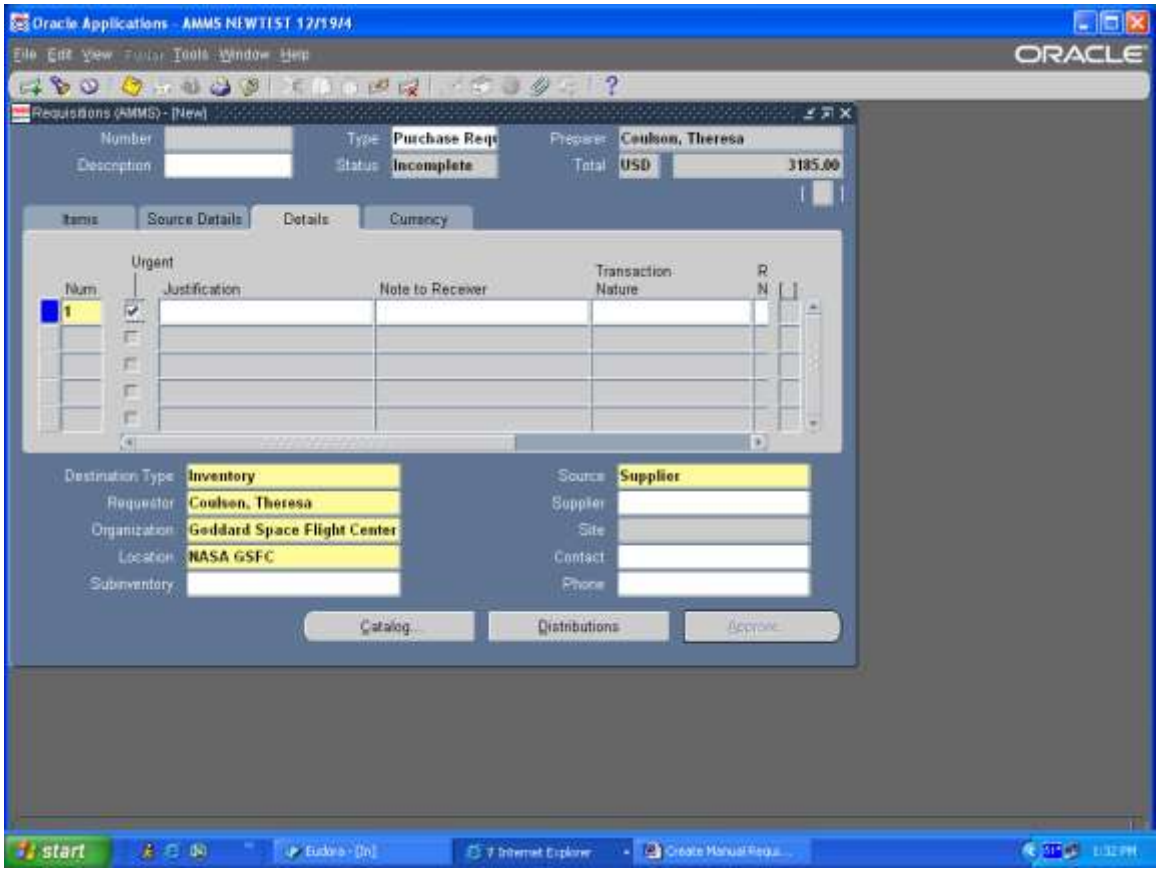
Step Description: Click on the Details tab.

Expected Results: Window view will change



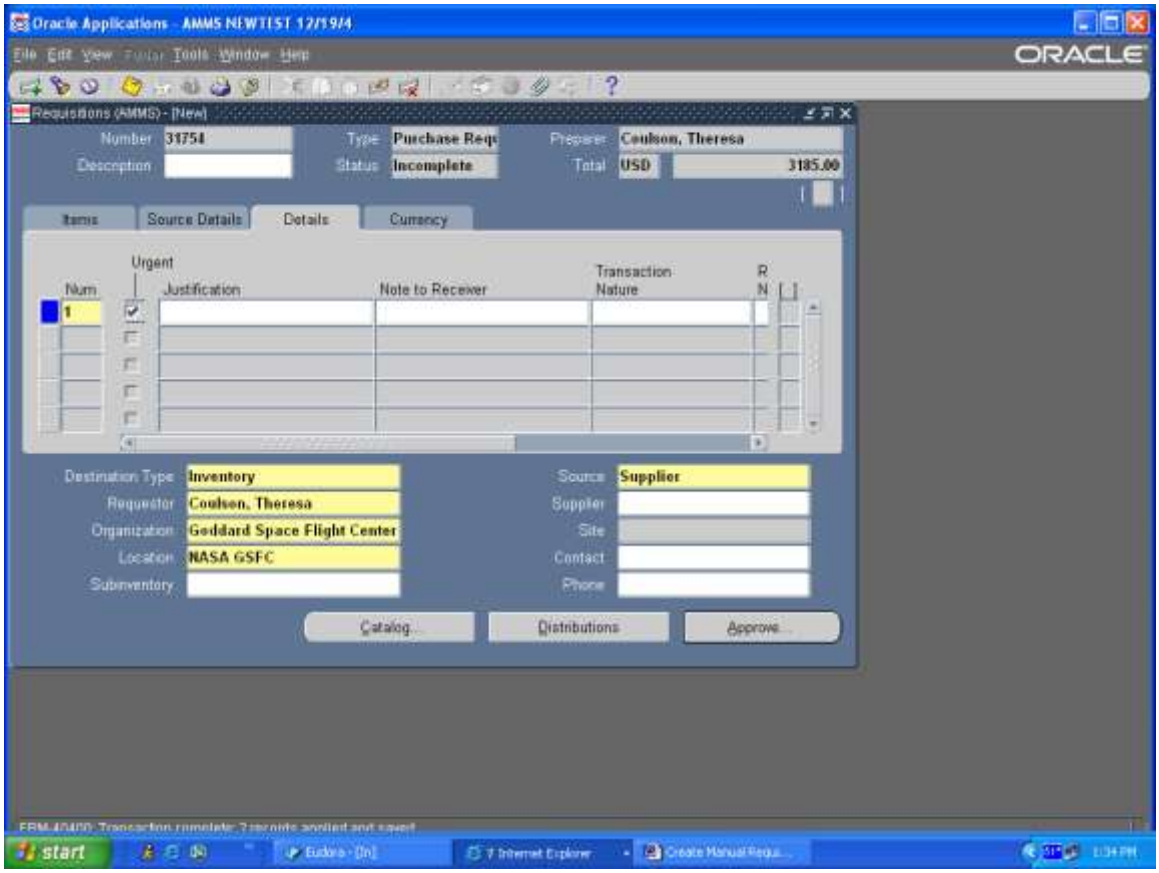
Step Description: If the requisition is Urgent, place a check mark in the Urgent box.

Expected Results: Box will be checked



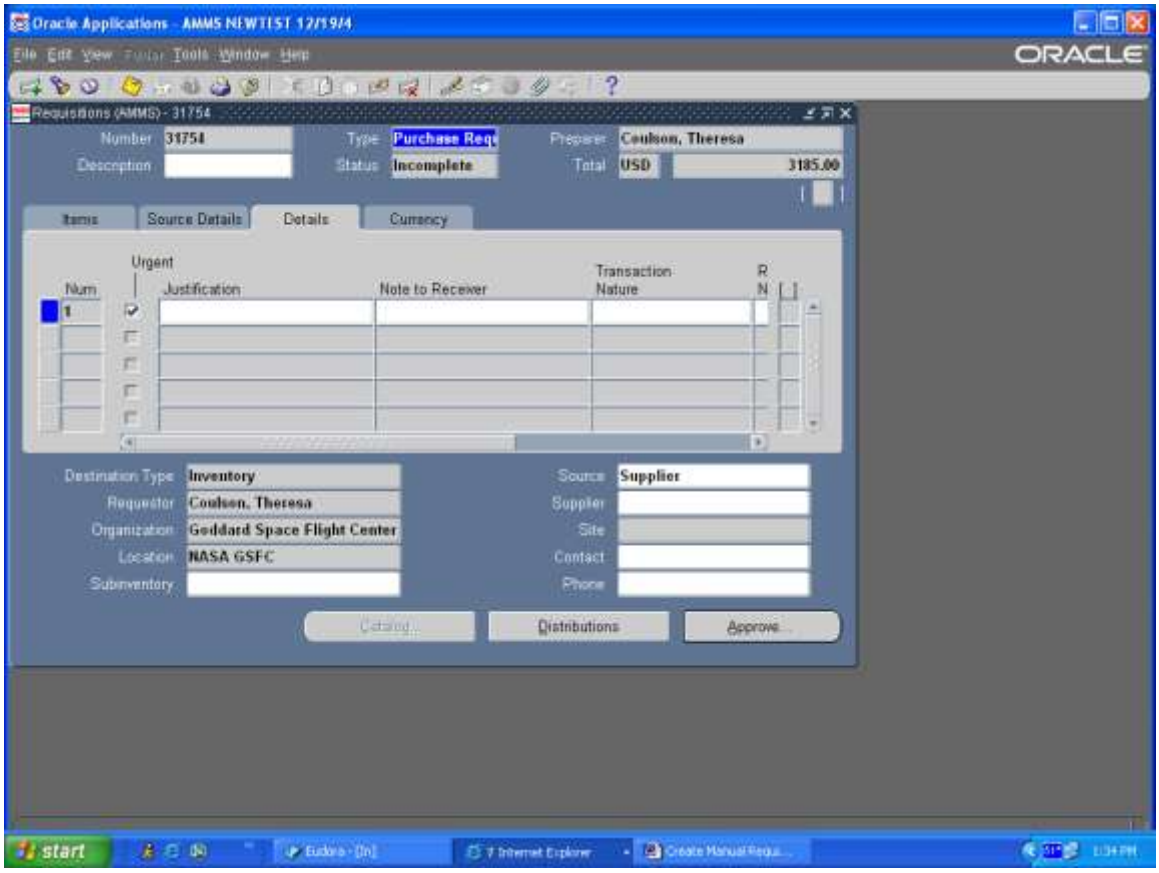
Step Description: Save your work and write down your requisition number.

Expected Results: Transactions Applies and Saved and you will get an assigned Requisition Number.



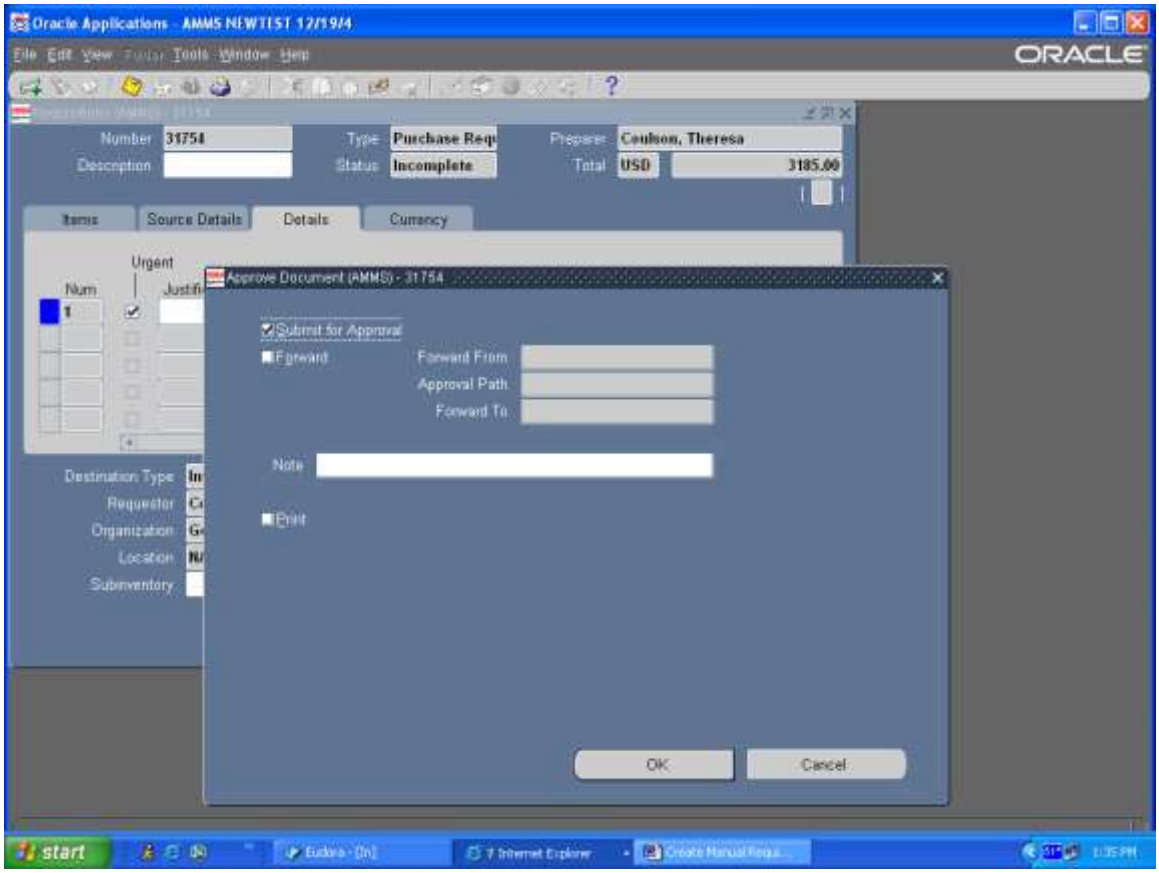
Step Description: Click on the Approve button

Expected Results: Approval Document s window will open



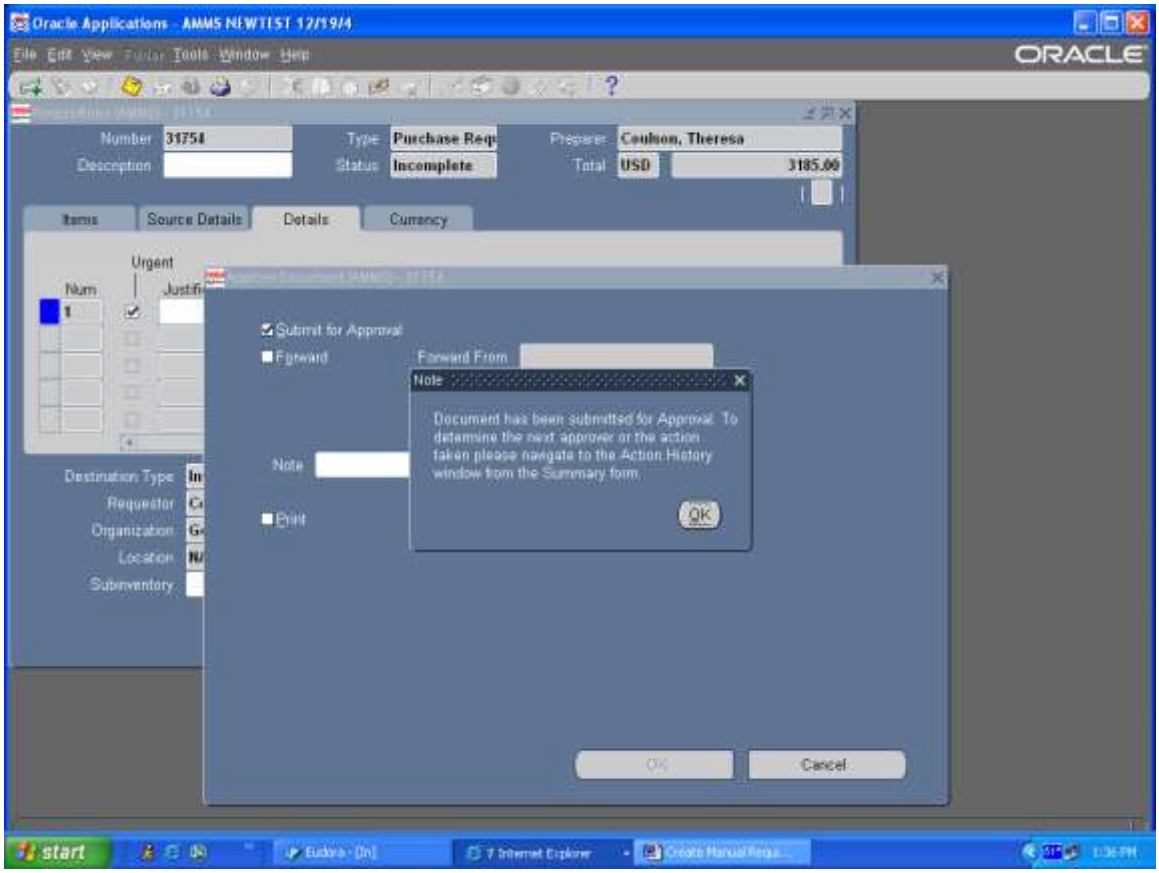
Step Description: Click OK to the Approval Documents window, the Submit for Approval box should already be checked.

Expected Results: Note window appears



Step Description: Click on to the Note window, Document has been submitted for approval.

Expected Results: Window disappears and screen has no data.



AMMS TRAINING SCRIPT

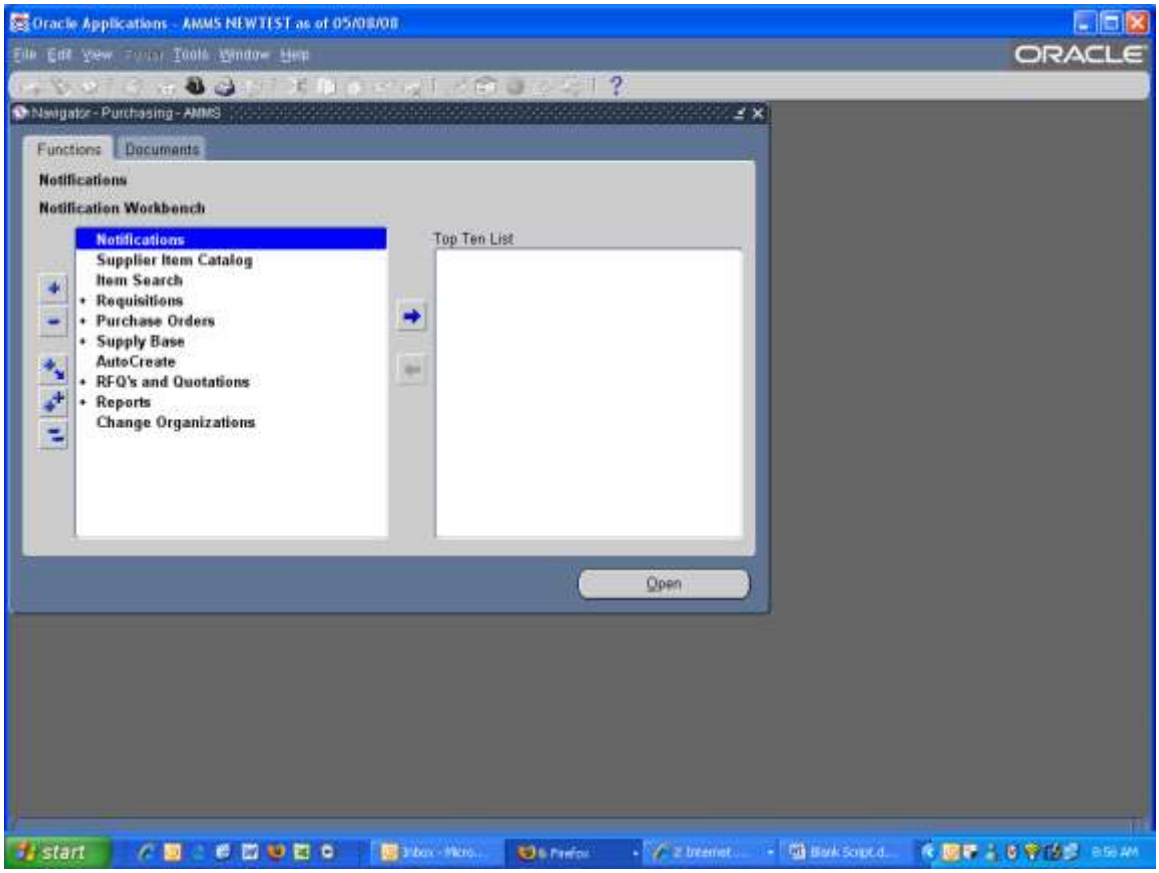
Create Standard Expense Purchase Order

Prepared by	**Theresa Coulson**
Author:	Theresa Coulson
Creation Date:	10/16/08
Version:	1
Last Updated:	8/6/2009

Gives Instruction to the Buyers on how to create a standard expense purchase order

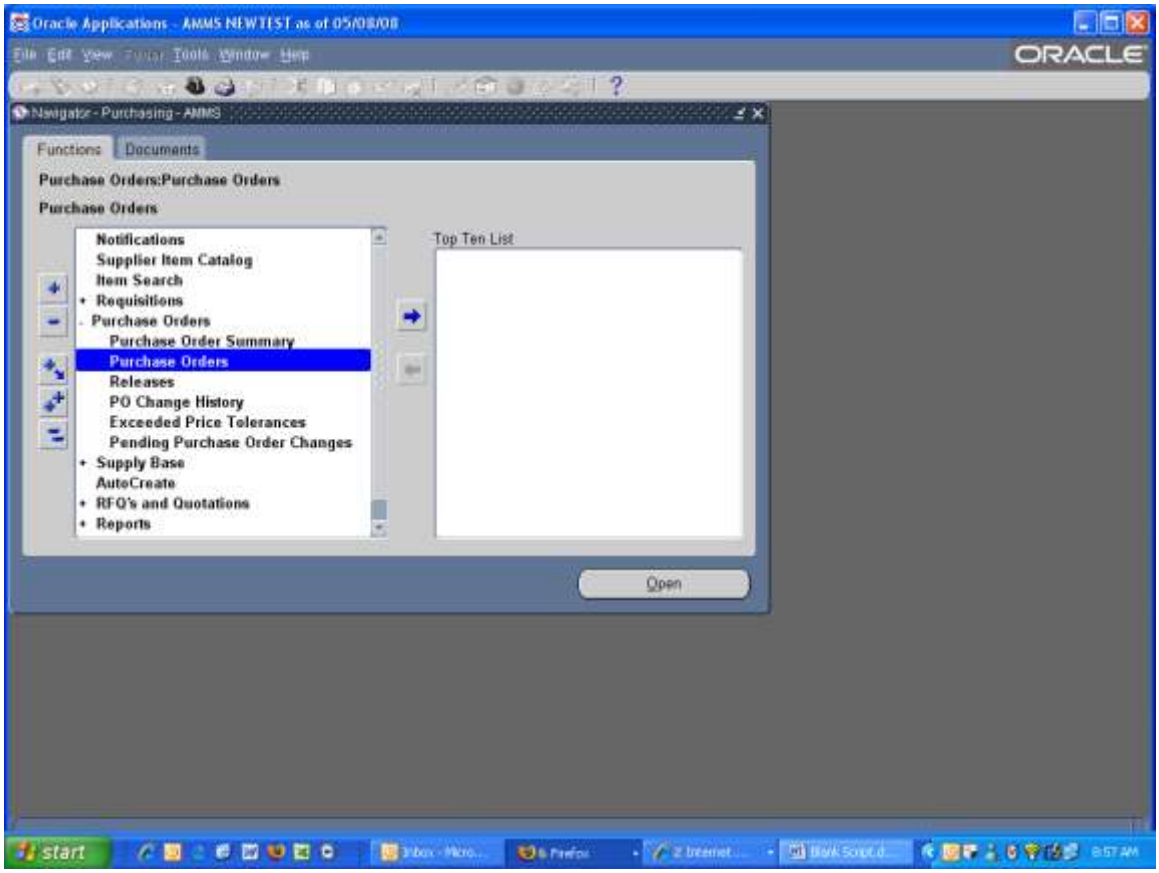
Step Description: Sign onto Oracle and select the Purchasing AMMS responsibility

Expected Results: Purchasing AMMS Main Menu will appear



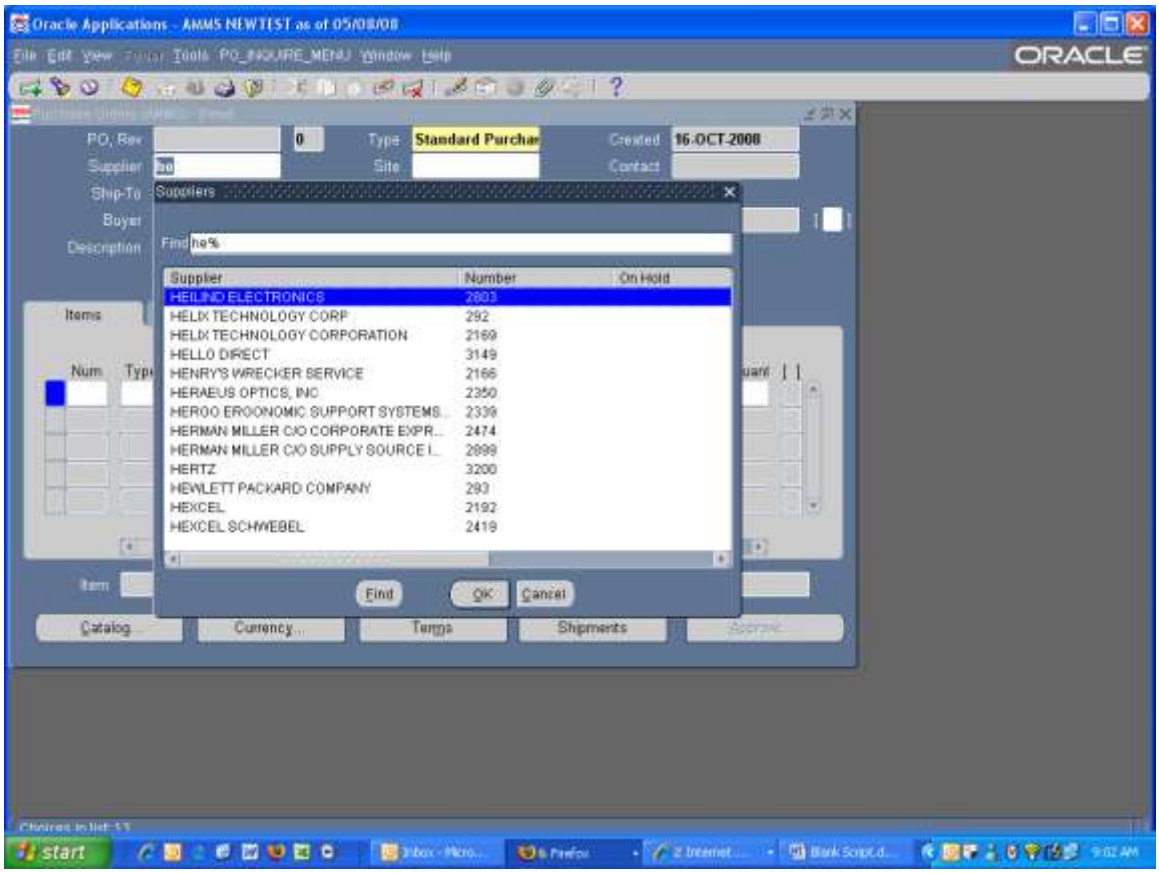
Step Description: From the Purchasing AMMS Main Menu select Purchase Orders > Purchase Orders and click on the Open button

Expected Results: Purchase Orders AMMS (New) window will appear



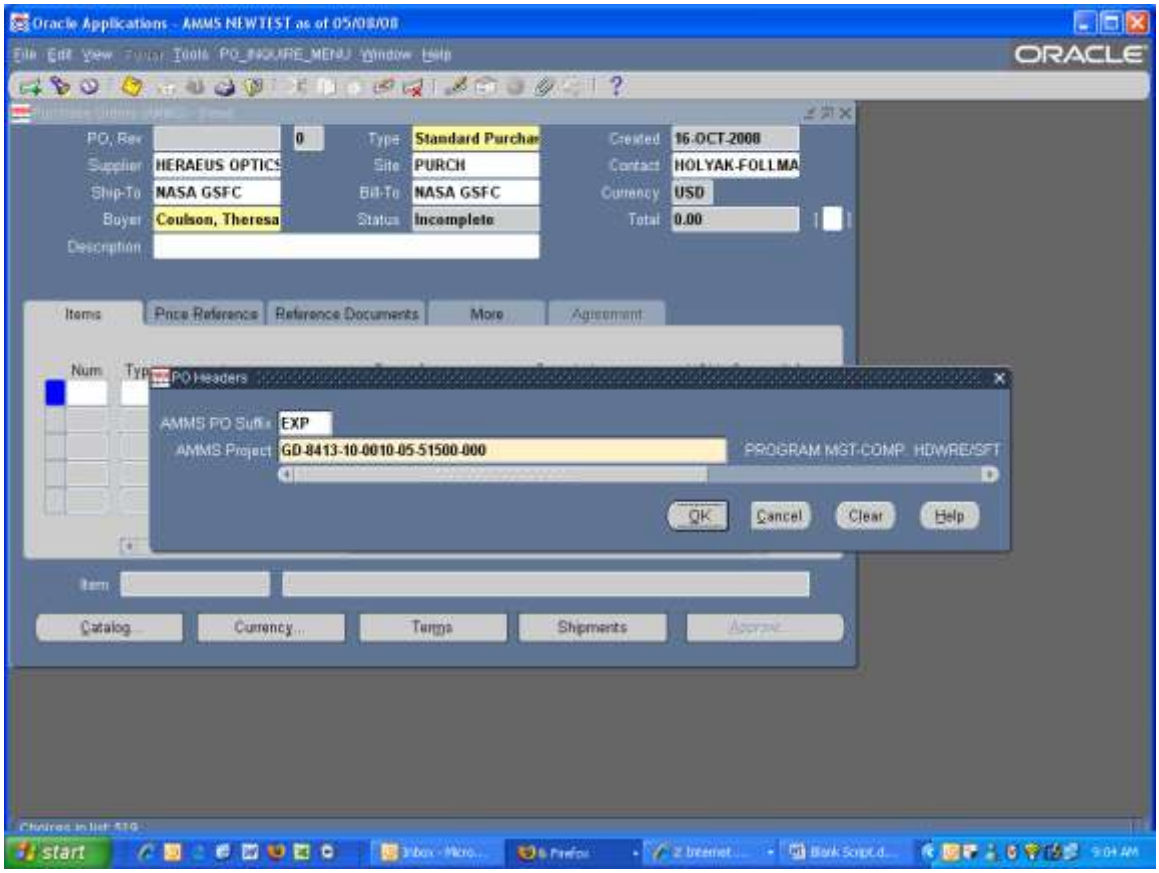
Step Description: In the Purchase Order AMMS (new) form enter the supplier that you are placing the purchase order with, you can click on the List of Values (LOV) or enter part of the supplier name. After you enter supplier hit the Tab button

Expected Results: Supplier field and other fields will be populated.



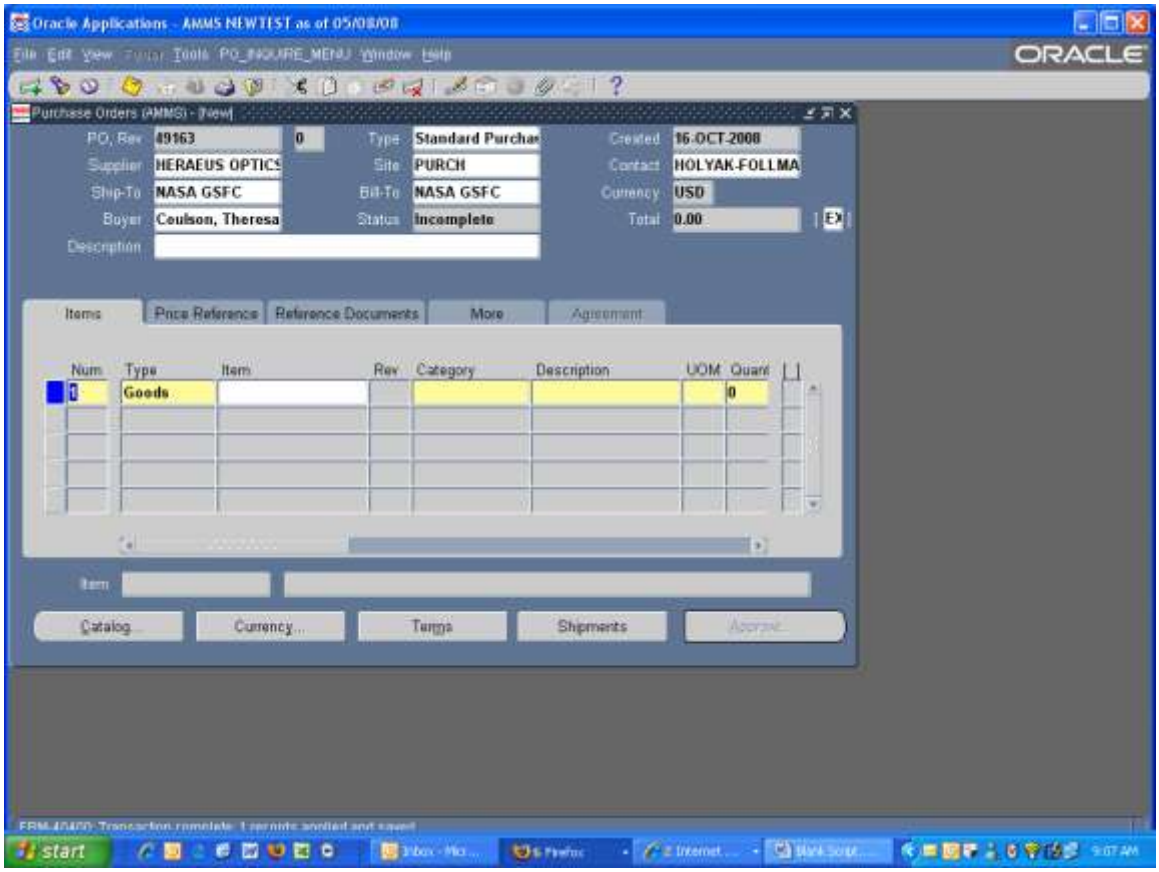
Step Description: Click in the Descriptive Flex Field (DFF) and enter the appropriate GL number and any suffix for the PO click OK to close the DFF window

Expected Results: Field will be populated



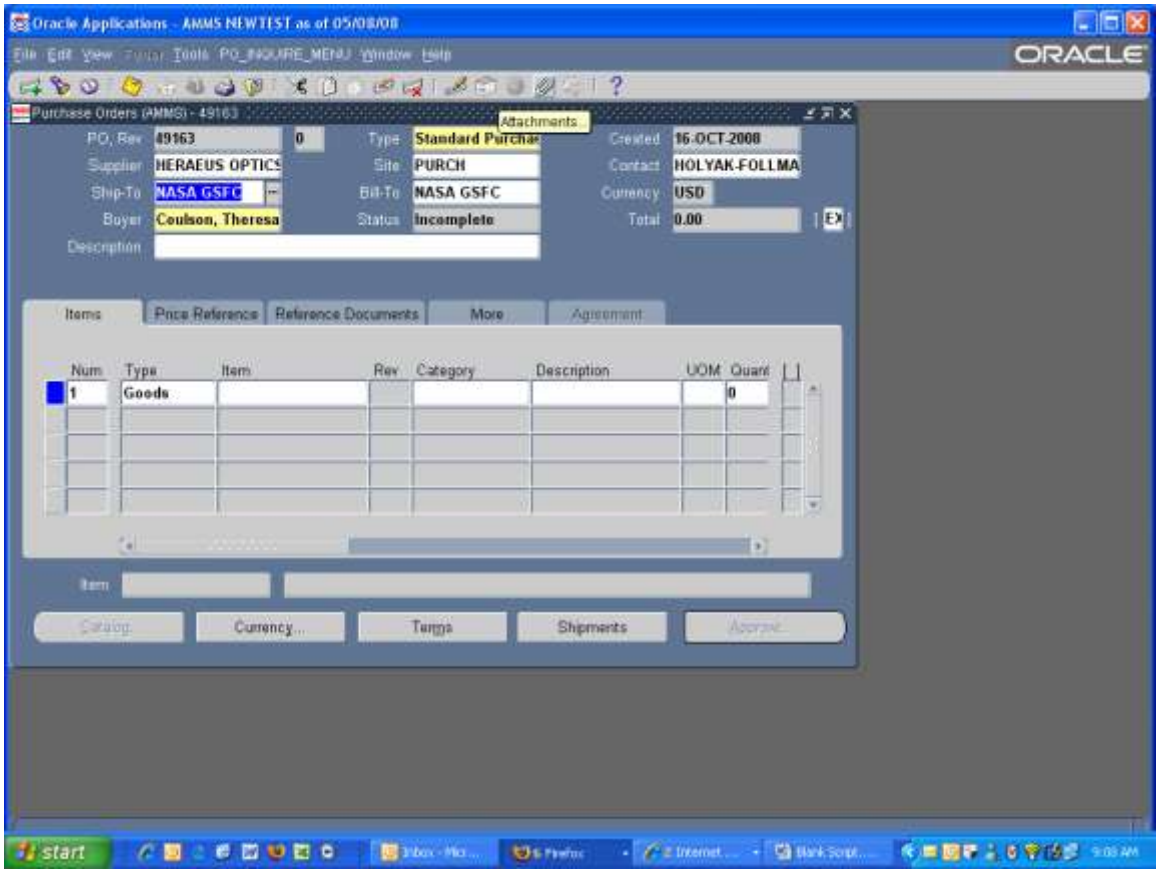
Step Description: Save your work, a Purchase Order number will be assigned

Expected Results: Fields populated



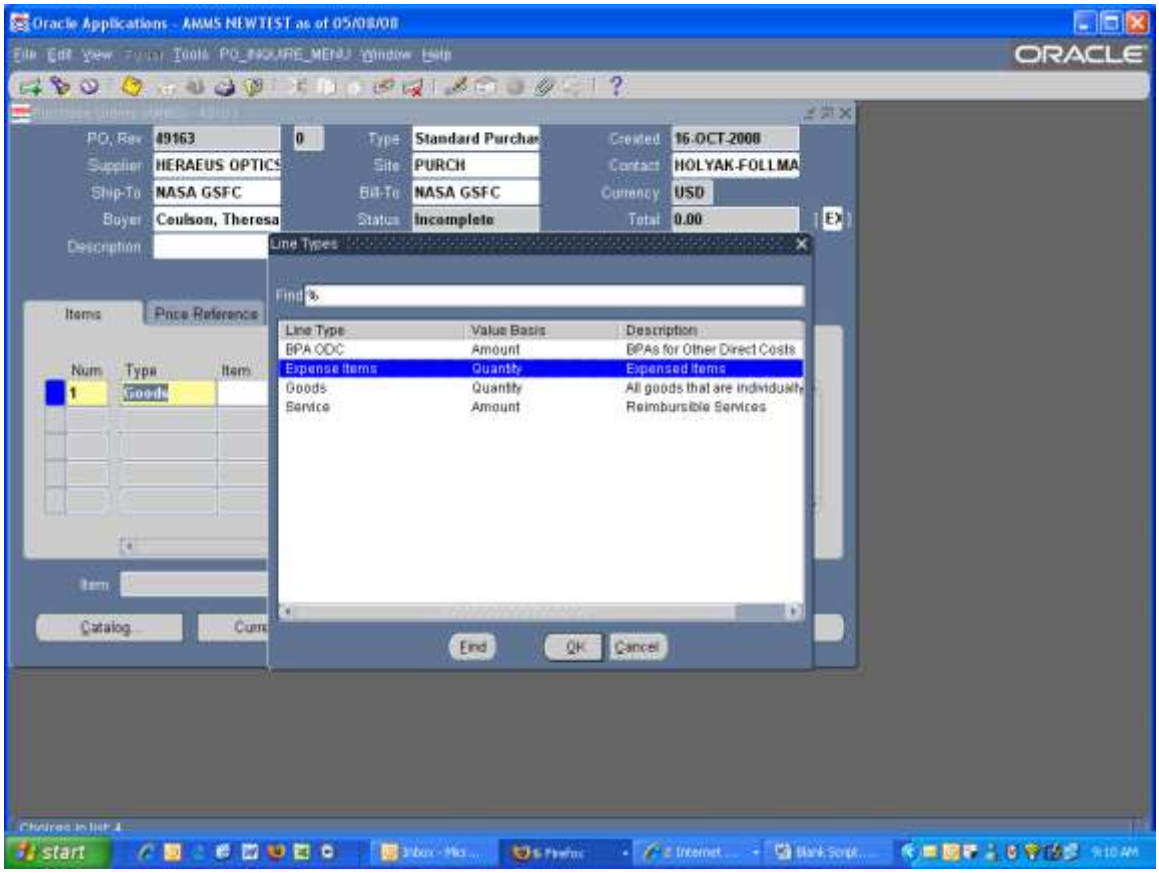
Step Description: Click on the Paper Clip on the tool bar and add your standard attachment and any other attachments that are needed for this purchase order

Expected Results: Attachments will be assigned



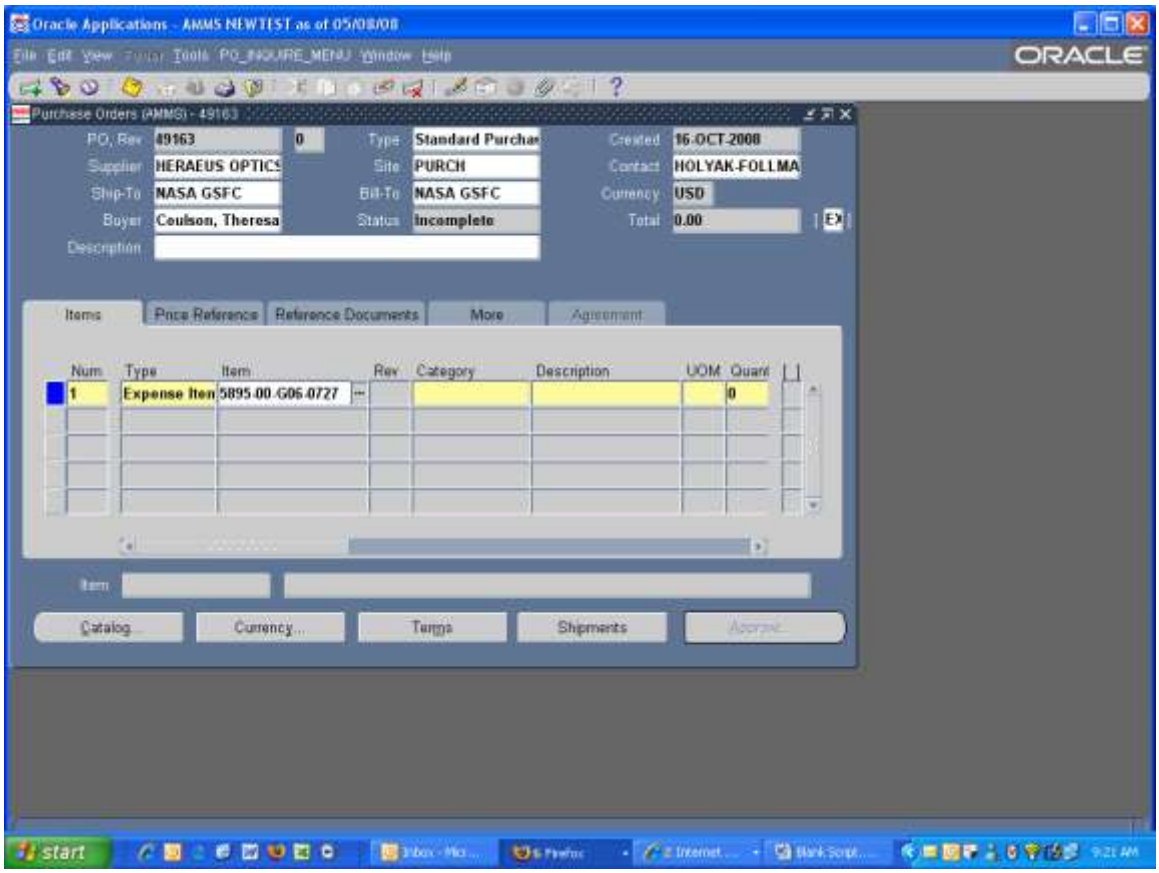
Step Description: At the line level of the PO click in the Type field click on the List of Values (LOV) and select Expense Items

Expected Results: Field data will update



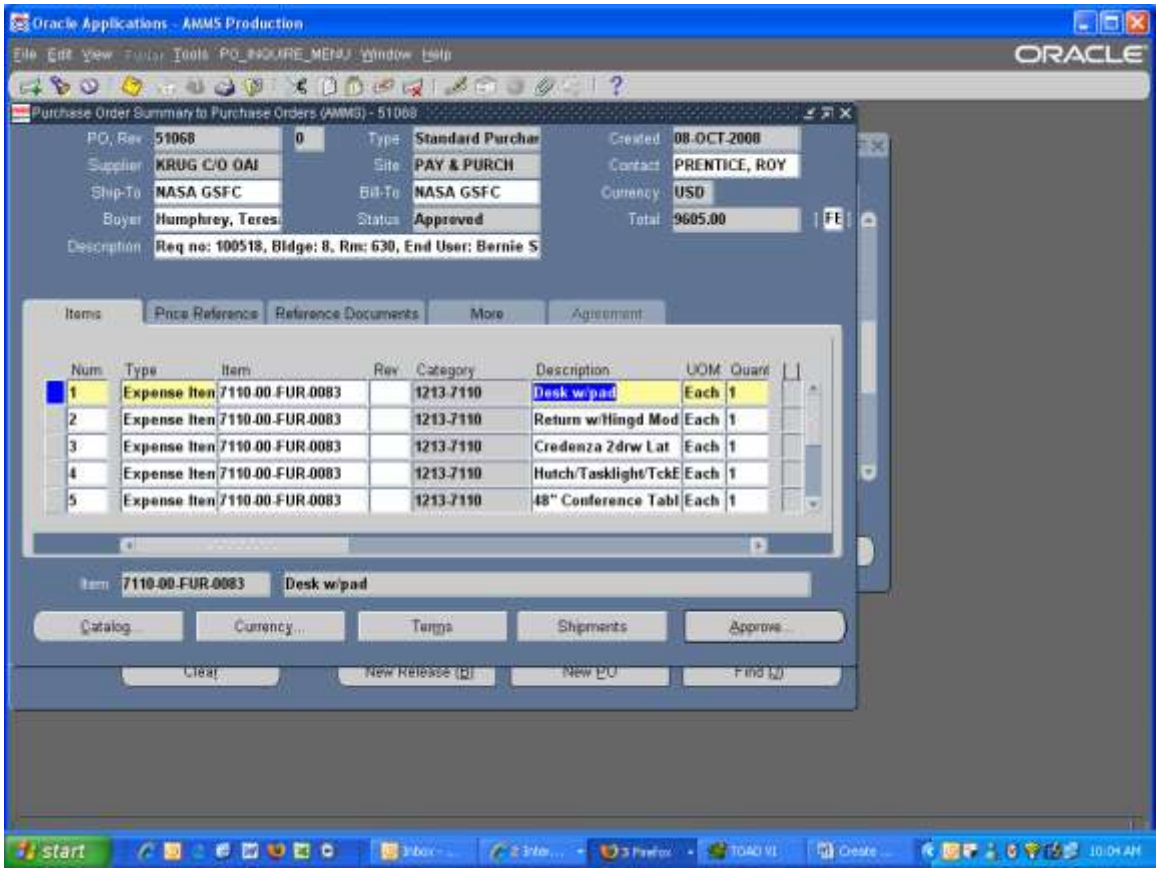
Step Description: In the Item field enter the Expense Item Number, tab to the next field If this is an “Across the Contract” purchase no stock number is required but the Category needs to say None-None.

Expected Results: Fields will be populated



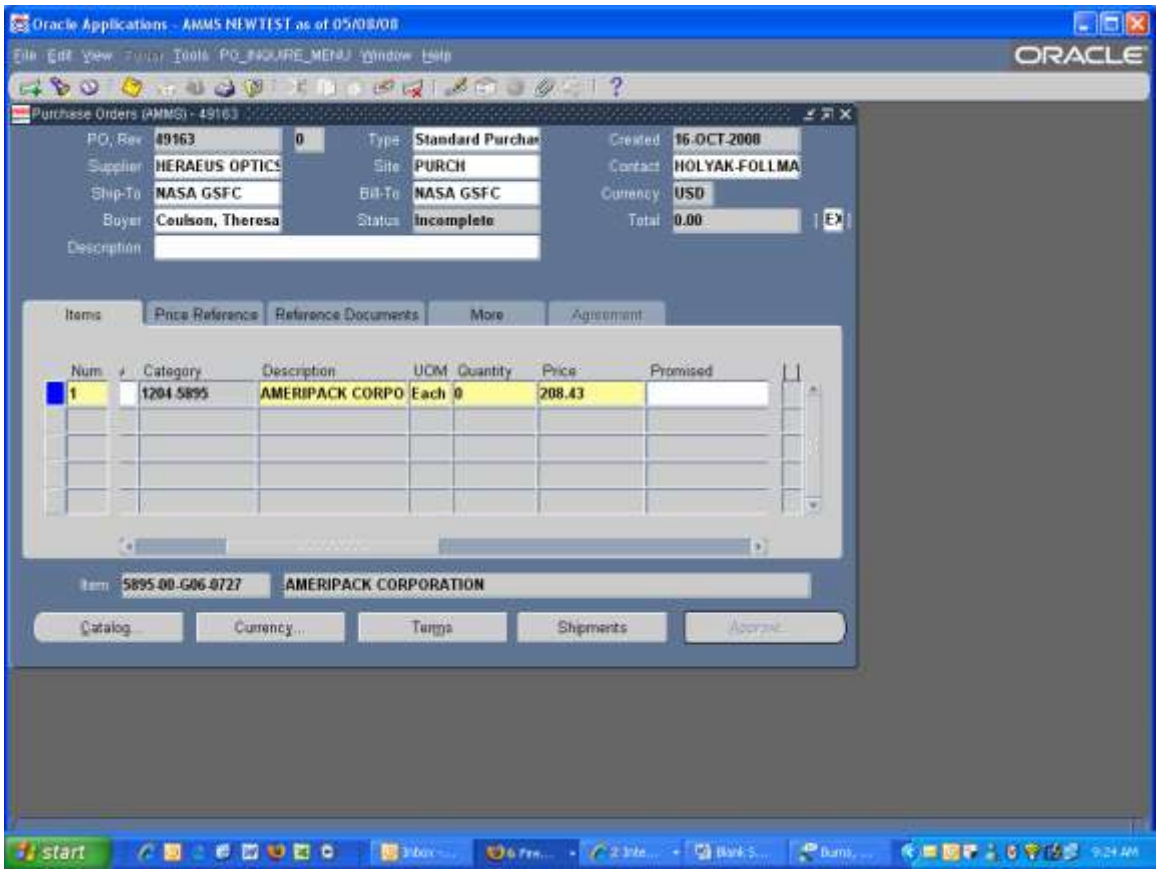
Step Description: In the Description field enter the actual name of what you are ordering, this does not have to be a proper noun

Expected Results: Description of items will change



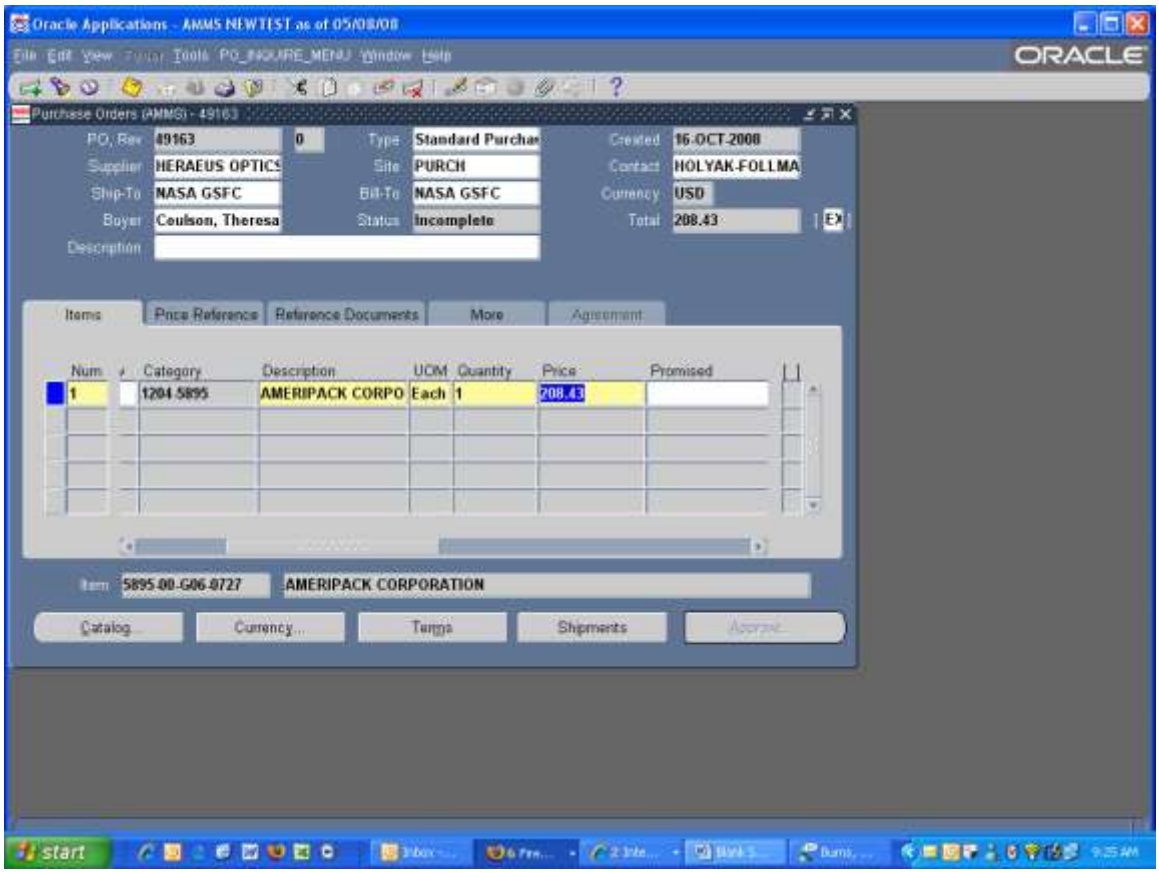
Step Description: In the Quantity field enter the quantity for this purchase order

Expected Results: Field will be populated



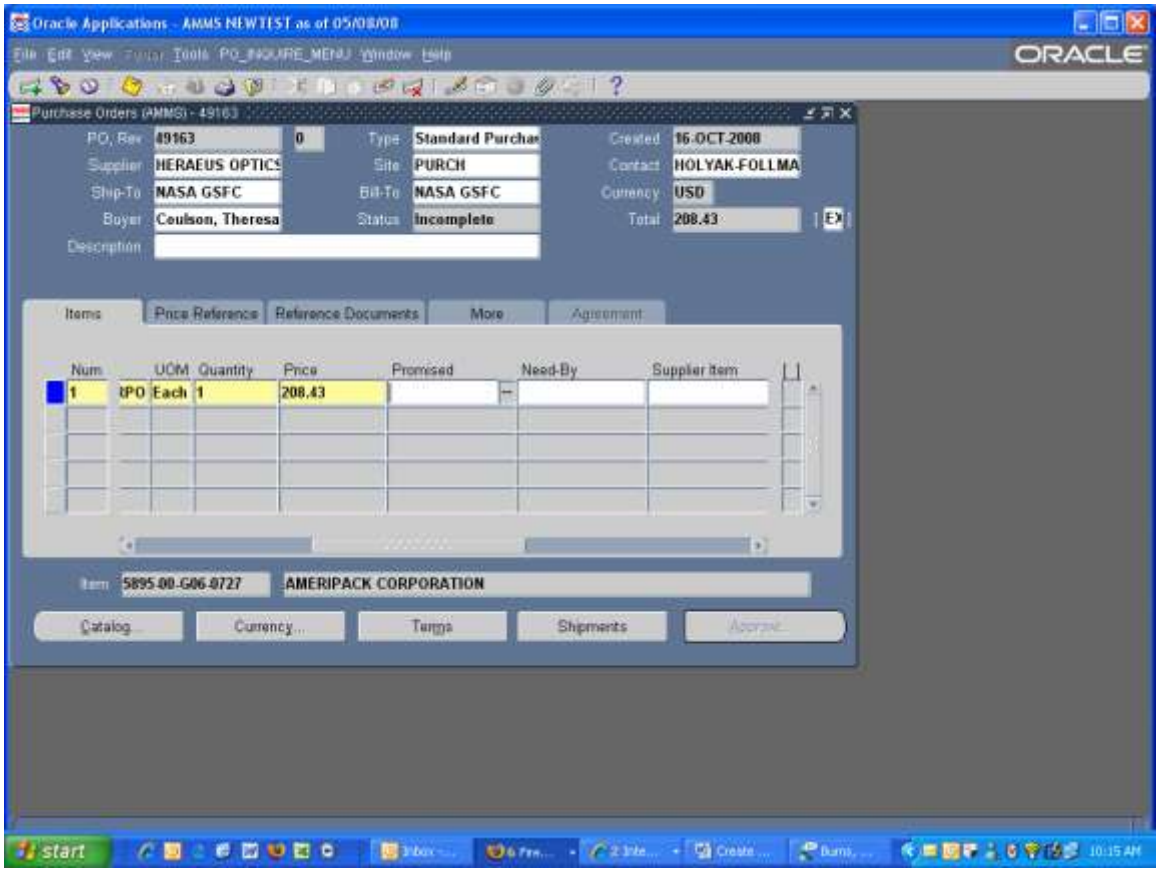
Step Description: Tab to the Price field and enter the cost for this expense item

Expected Results: Data will update



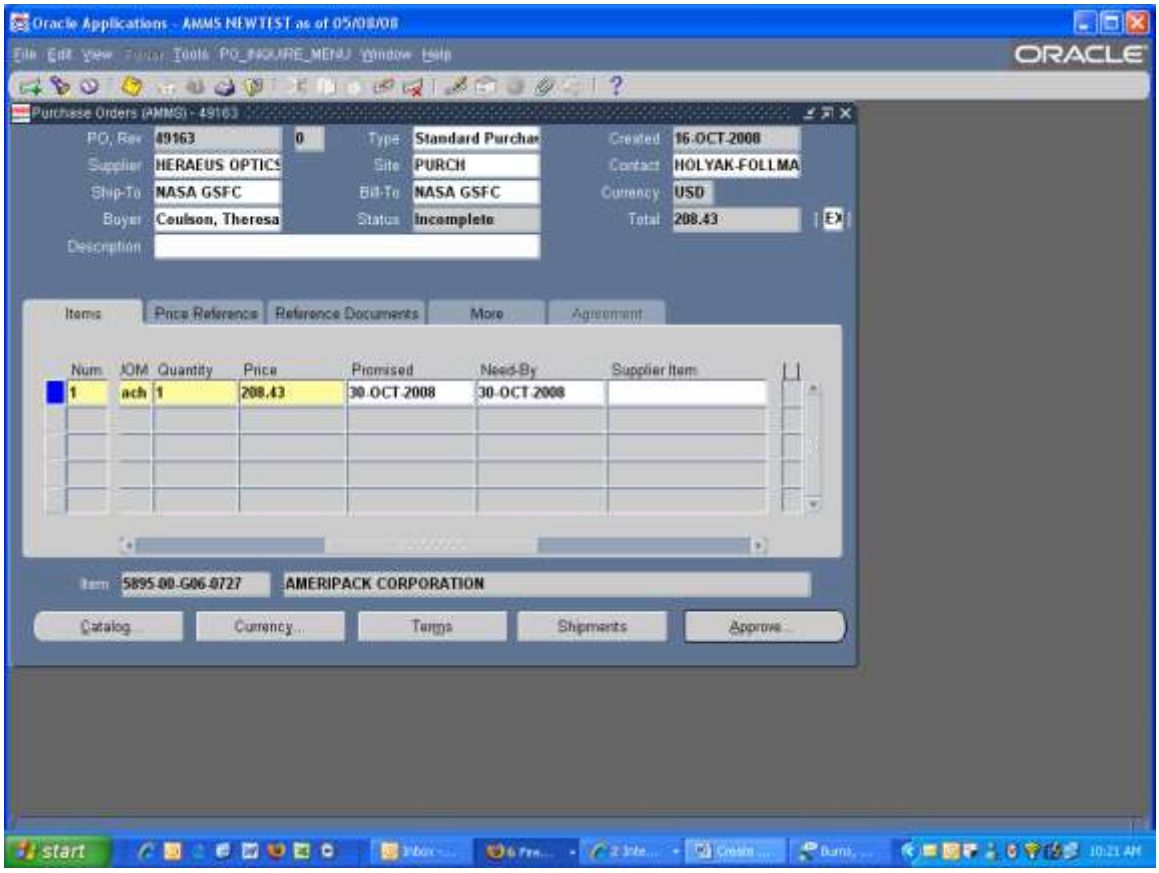
Step Description: Tab to the Promised field and enter Estimated Delivery Date for the material, enter the same date in the Need by field

Expected Results: Fields will be populated



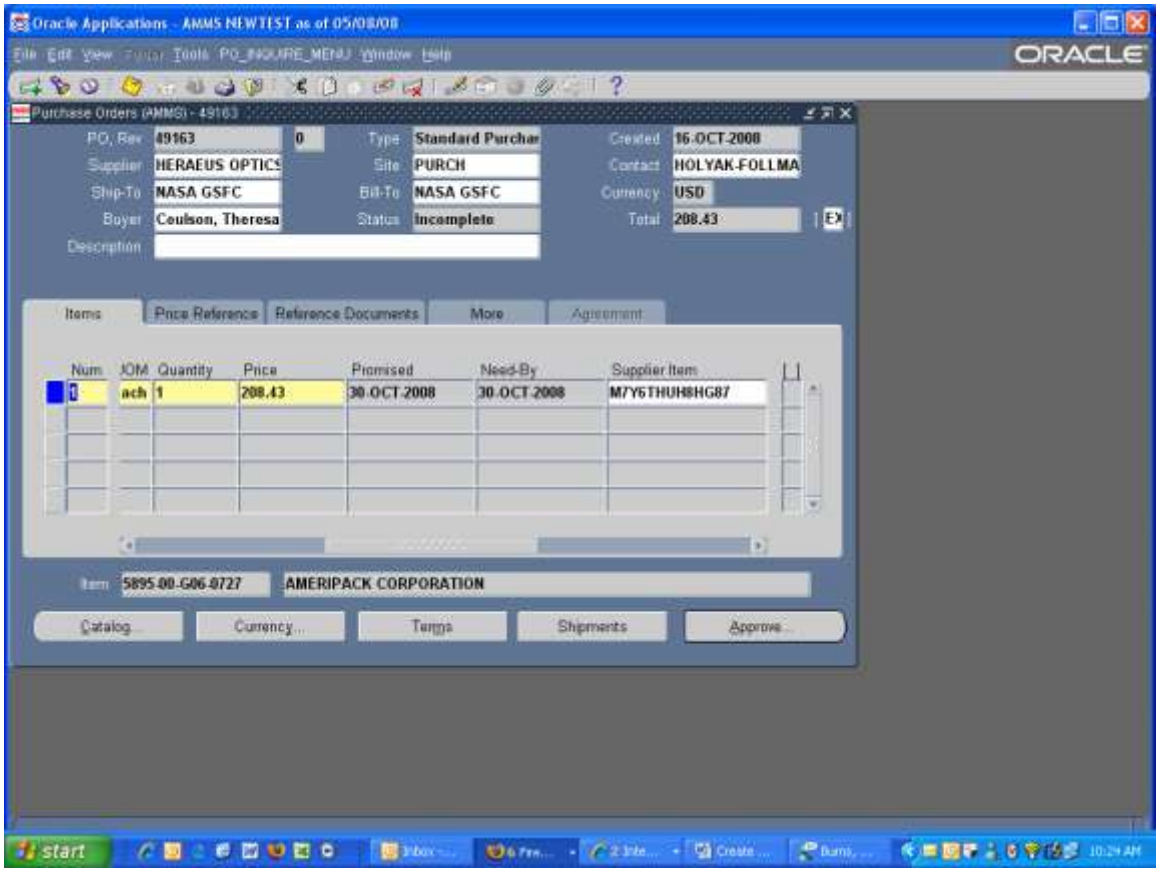
Step Description: Tab to the Supplier Item field and enter the part number for the expense item

Expected Results: Field will be populated



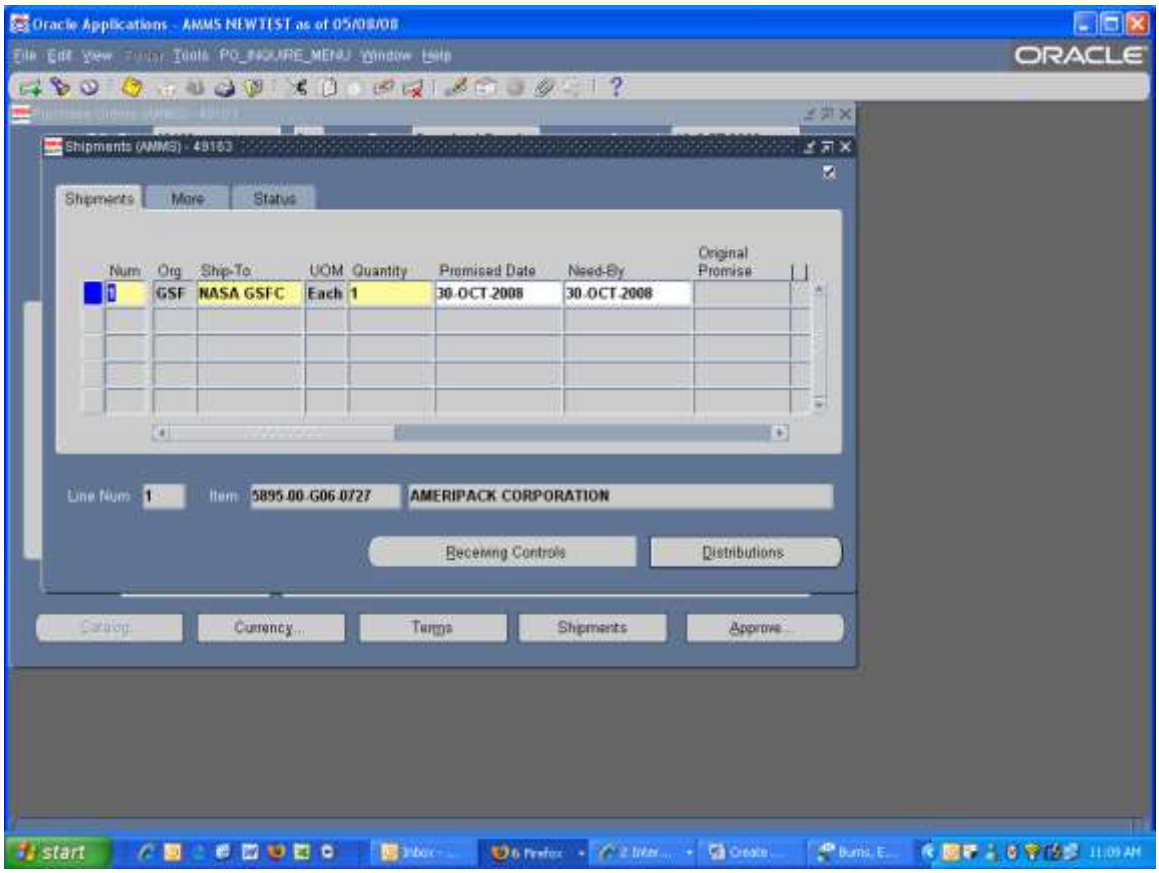
Step Description: Click on the Shipments button at the bottom of the window

Expected Results: Shipments window will appear



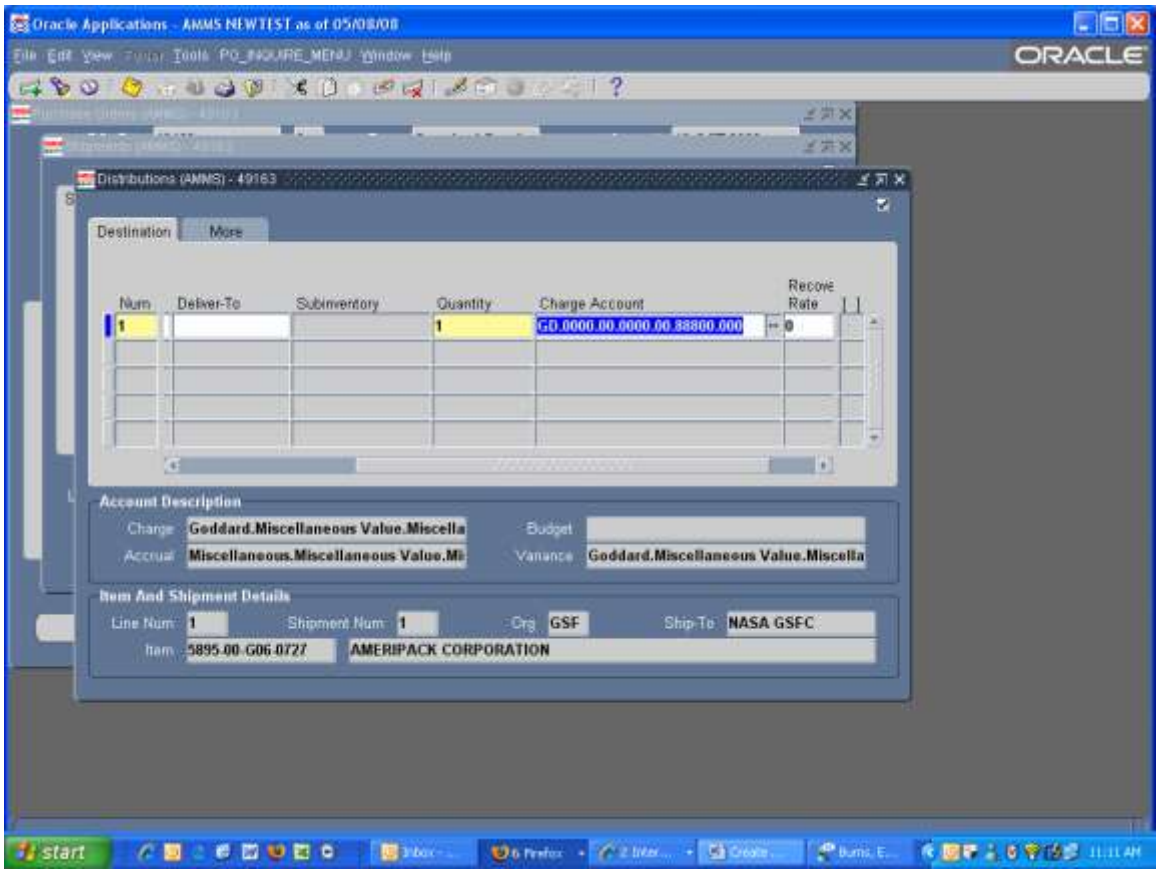
Step Description: Click on the Distribution Lines at the bottom of the Shipments window

Expected Results: Distributions window will open



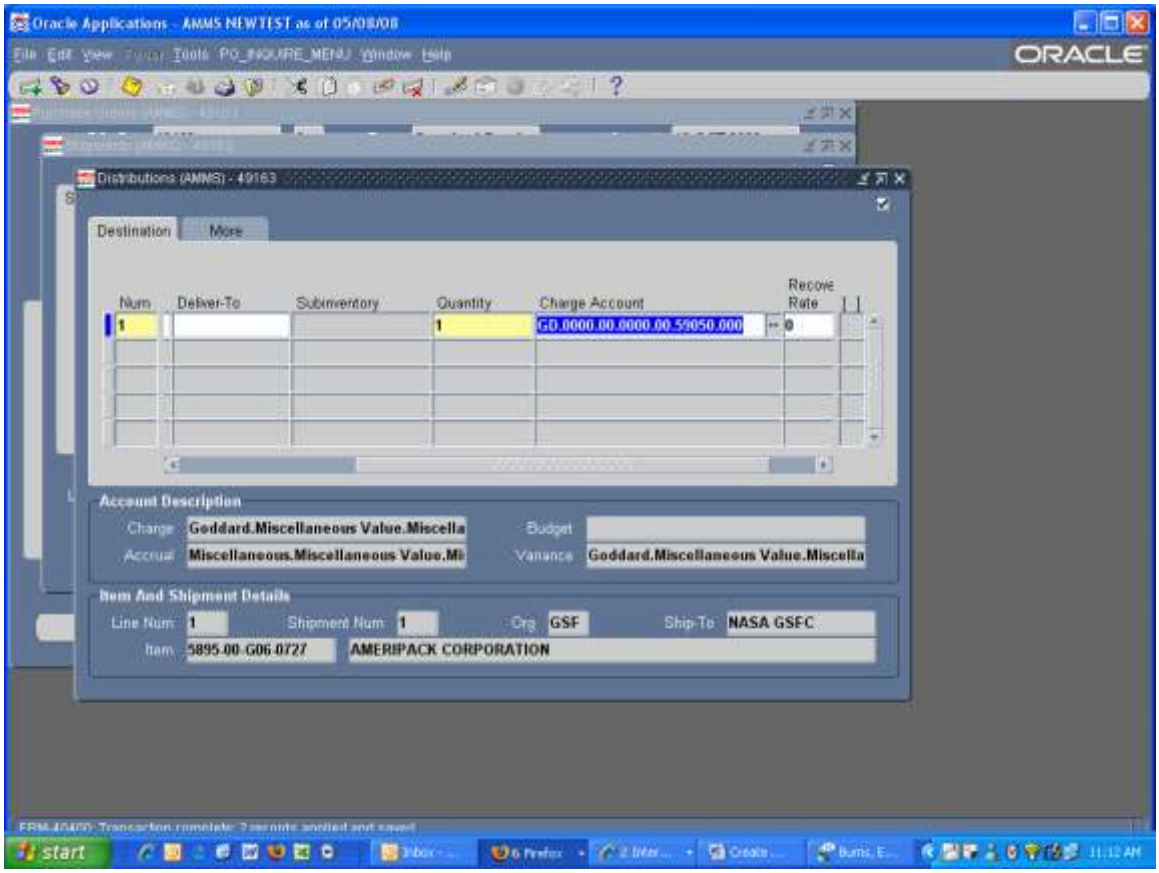
Step Description: Slide over to the Charge Account field and change the account number to reflect the appropriate account

Expected Results: Data will change



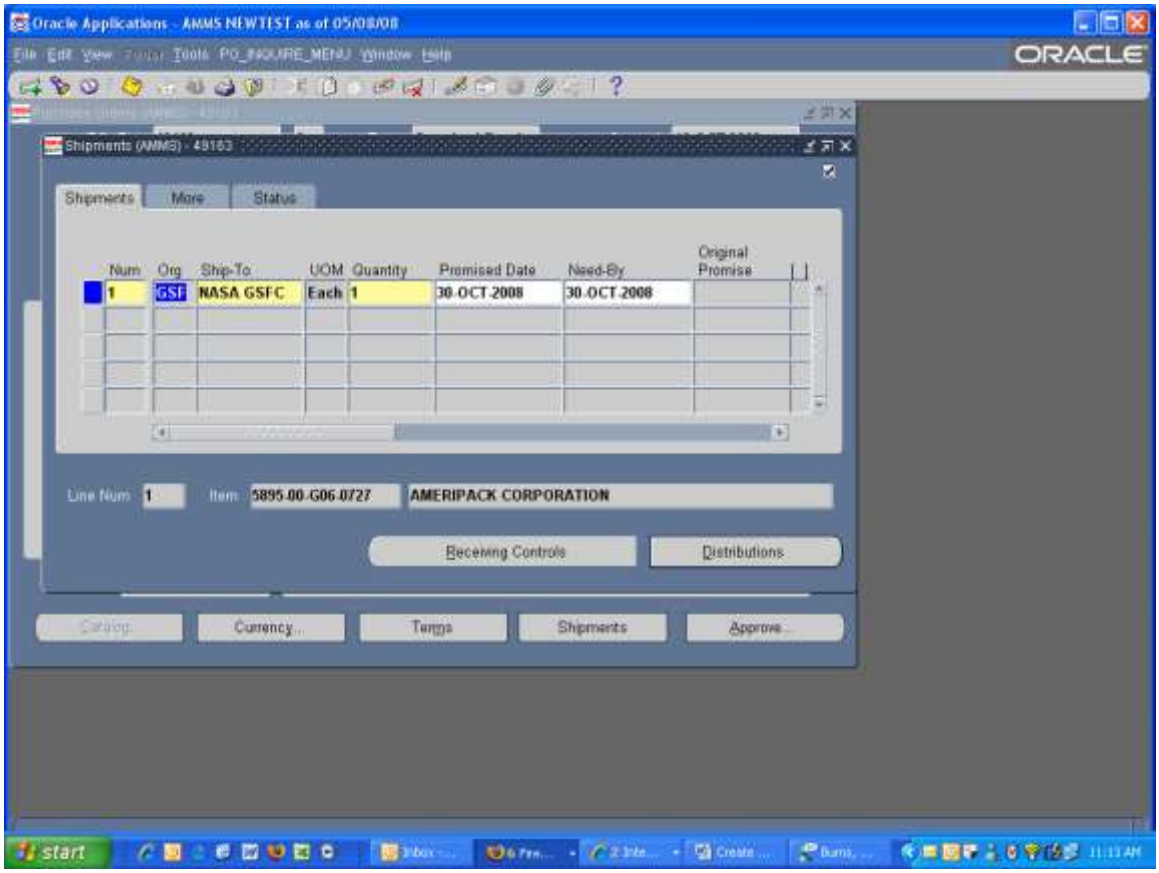
Step Description: Save your work and close the Distributions window

Expected Results: Return to Shipments window



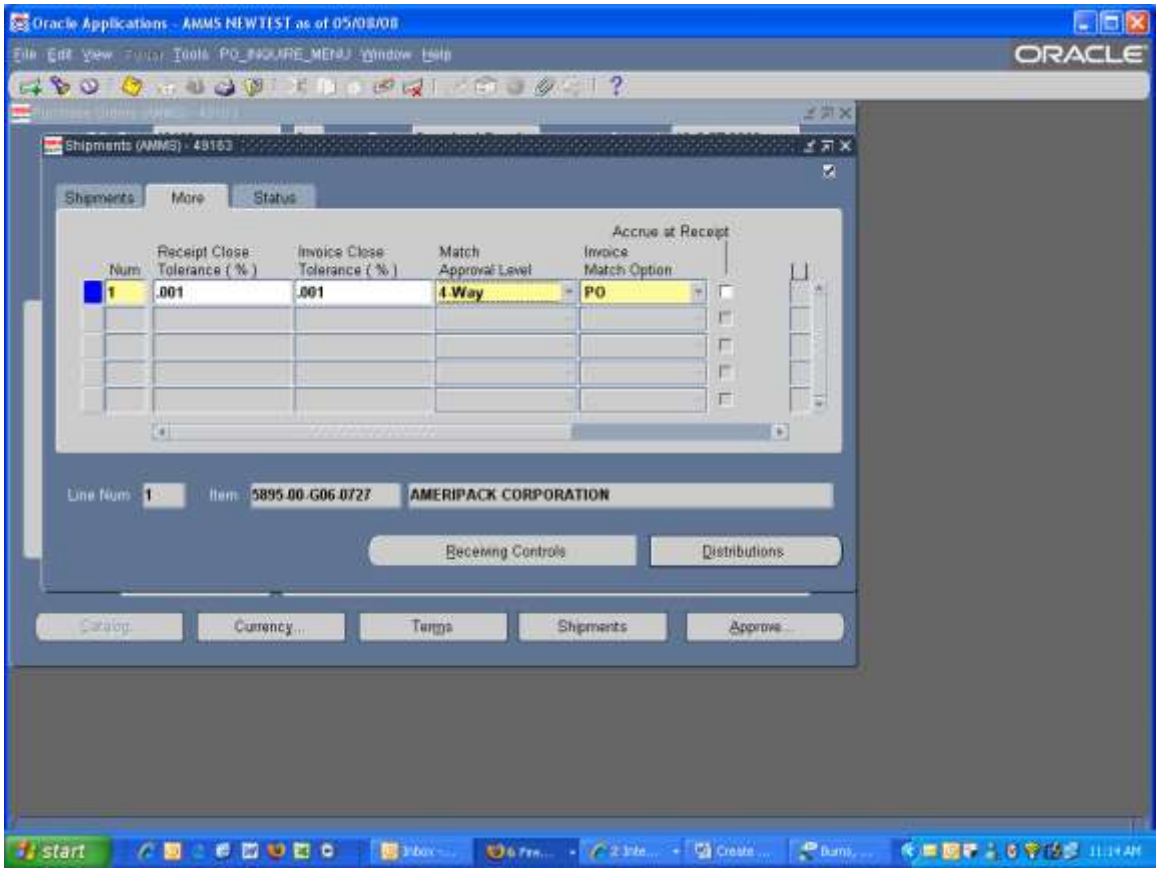
Step Description: In the Shipments window click on the More tab

Expected Results: Window view will change



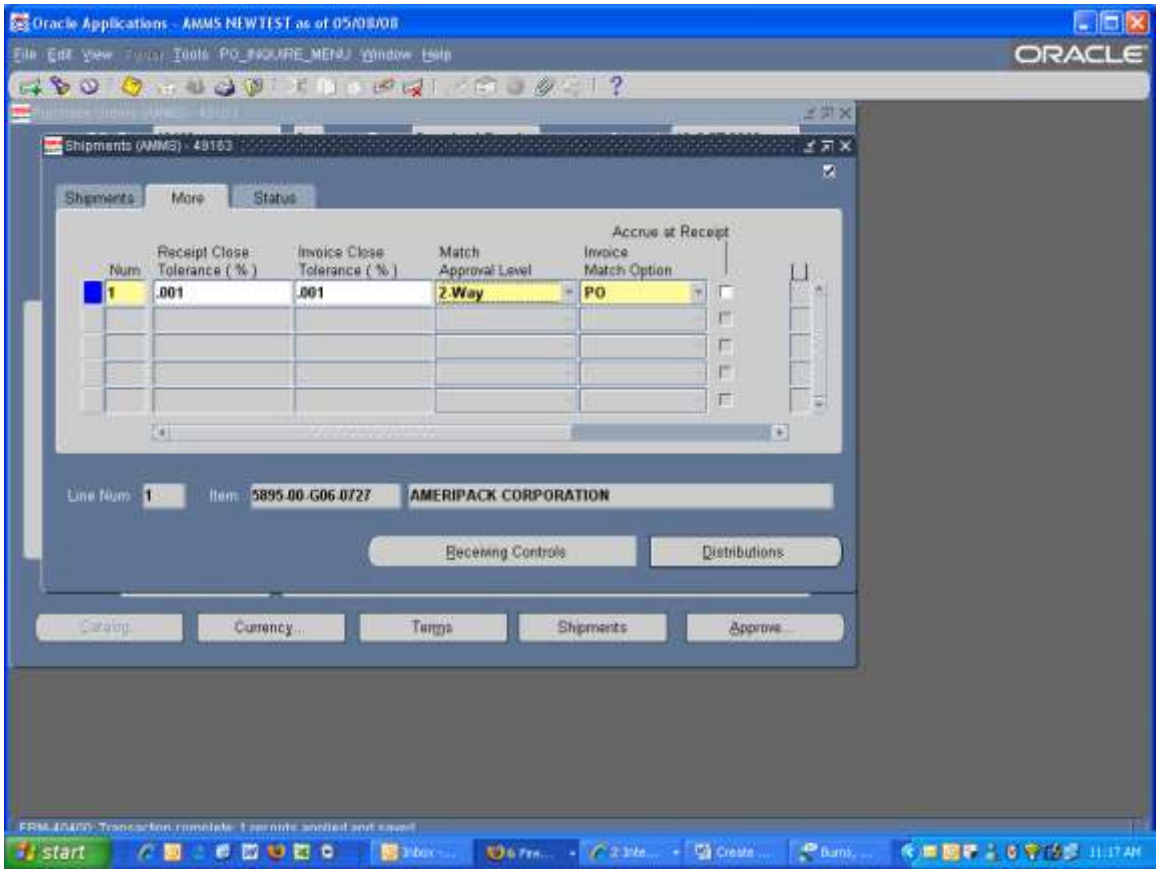
Step Description: At the More tab change the Match Approval level to 2 Way

Expected Results: Data will be updated



Step Description: Save your work and close the Shipments window

Expected Results: Return to Purchase Order window

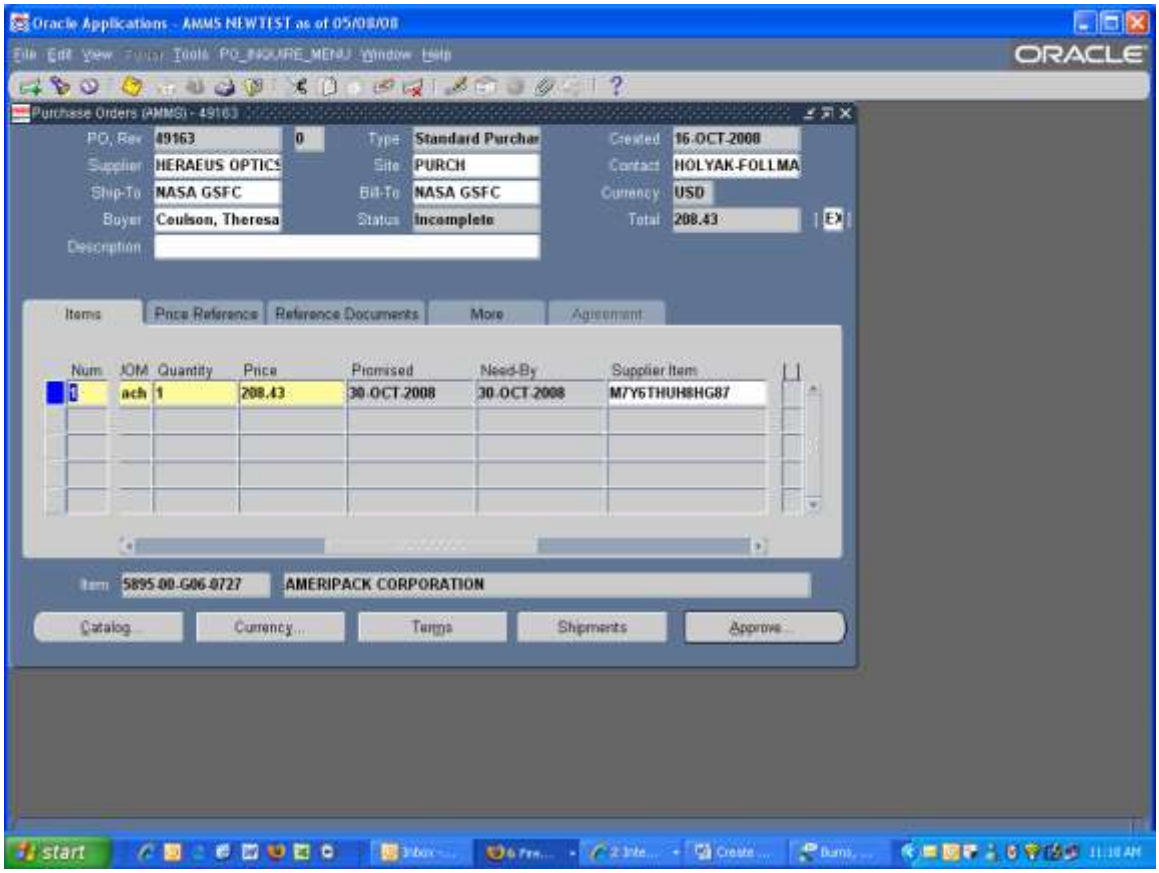


Step Description: Repeat all of these steps for each line on the Purchase Order

Expected Results: Purchase Order will be updated

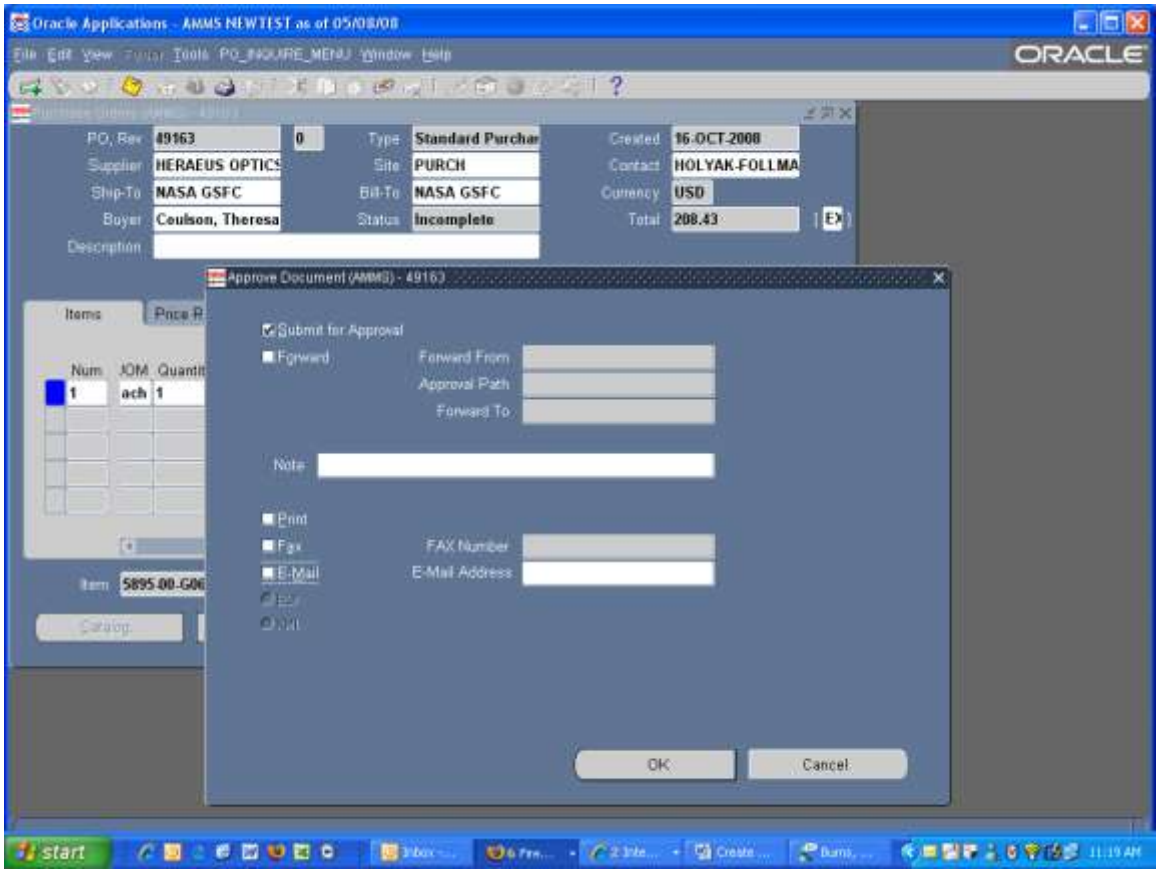
Step Description: Click on the Approve button at the bottom of the window

Expected Results: Approve Documents window will appear



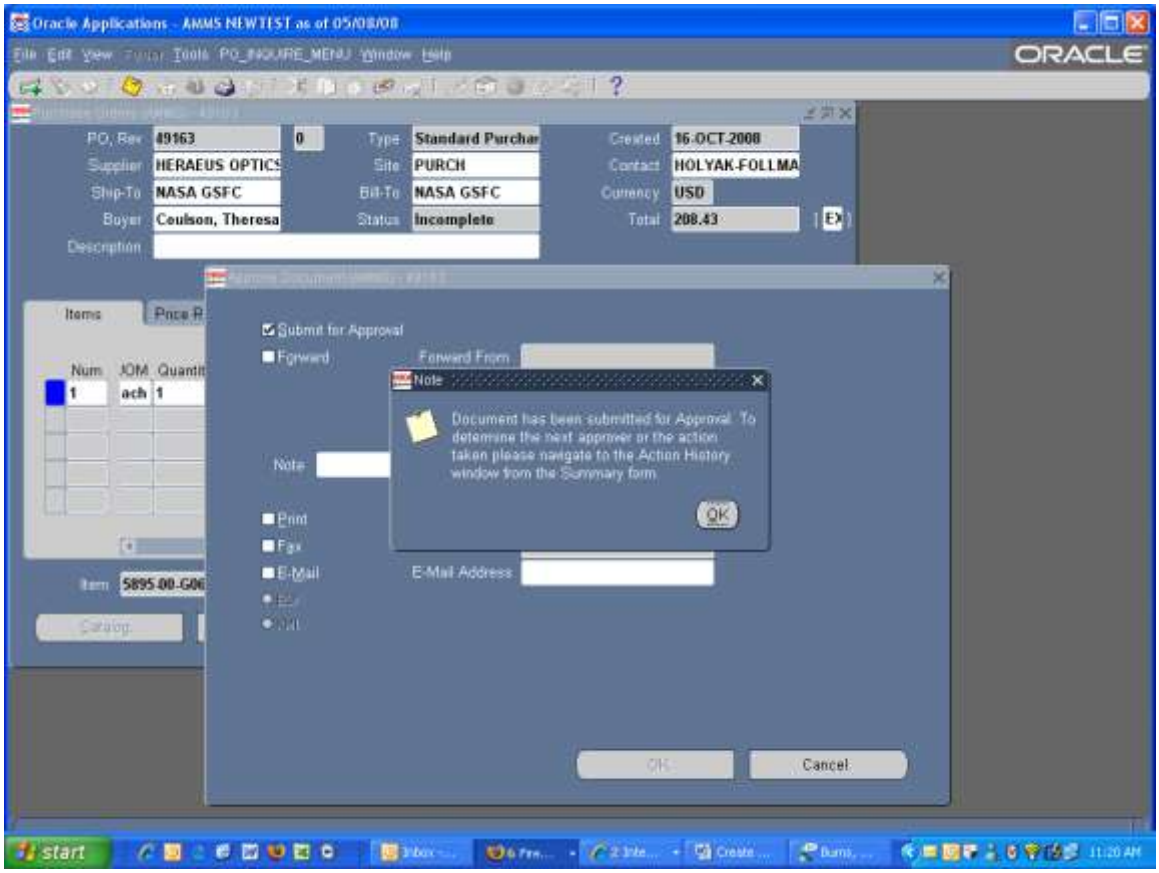
Step Description: Remove the check mark from the Email back and click OK

Expected Results: Notice window will appear



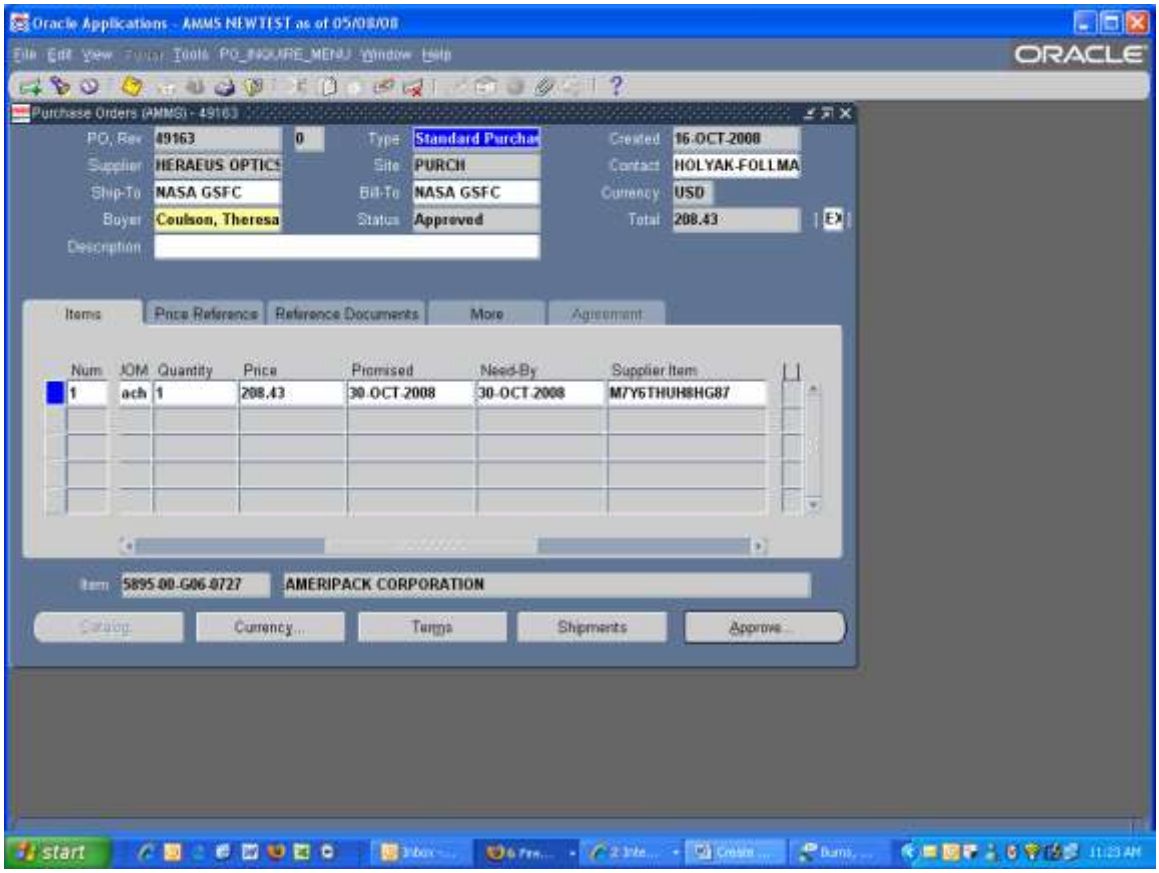
Step Description: Click OK to the NOTE window

Expected Results: Status on PO goes from Incomplete to Approved



Step Description: Now Print your Purchase Order using your How to Print a PO script

Expected Results: PO will print



AMMS TRAINING SCRIPT
Create Purchase Order Attachment

Purpose

The purpose of this training script is to explain how to create an Purchase Order attachment.

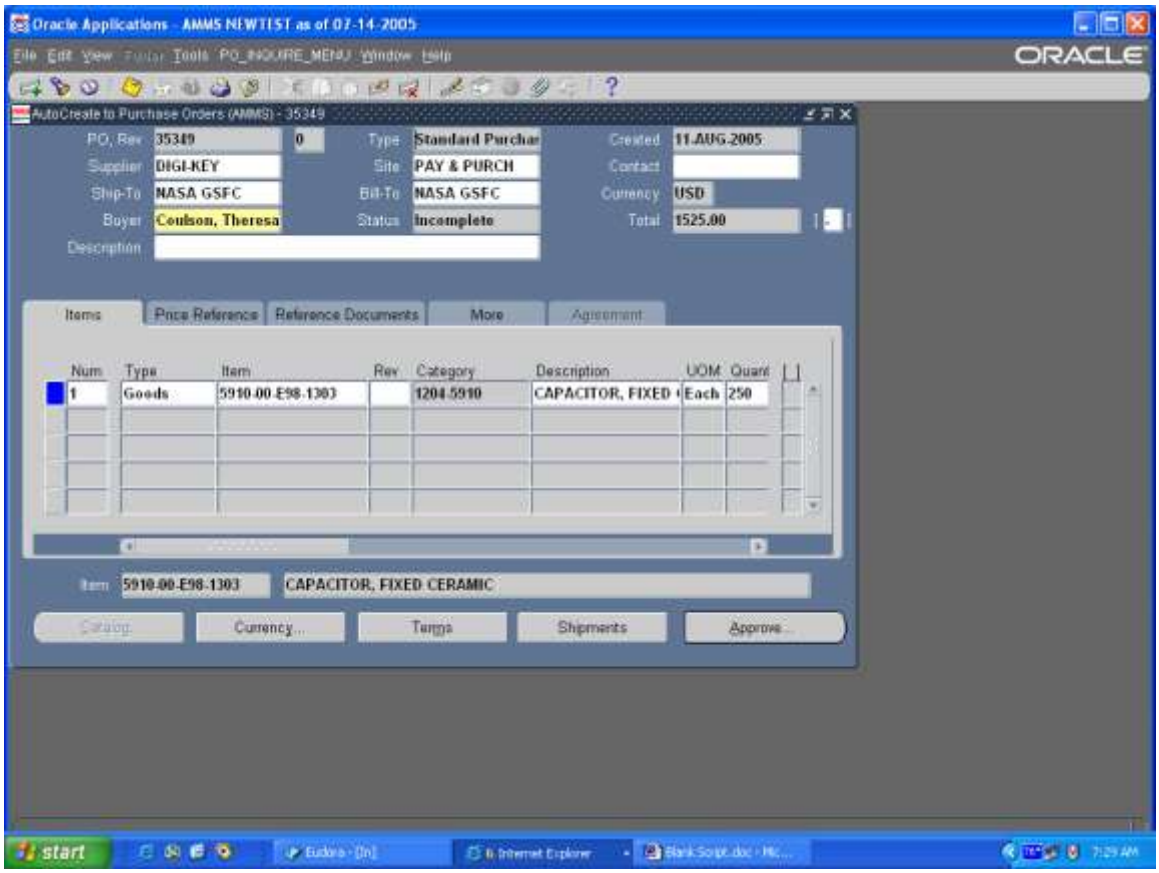
Audience

Buyers

Prepared By	Theresa Coulson
Creation Date:	08/11/2005
Document Name	Creating a Purchase Order Attachment.doc
Version	2
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Purchasing.	

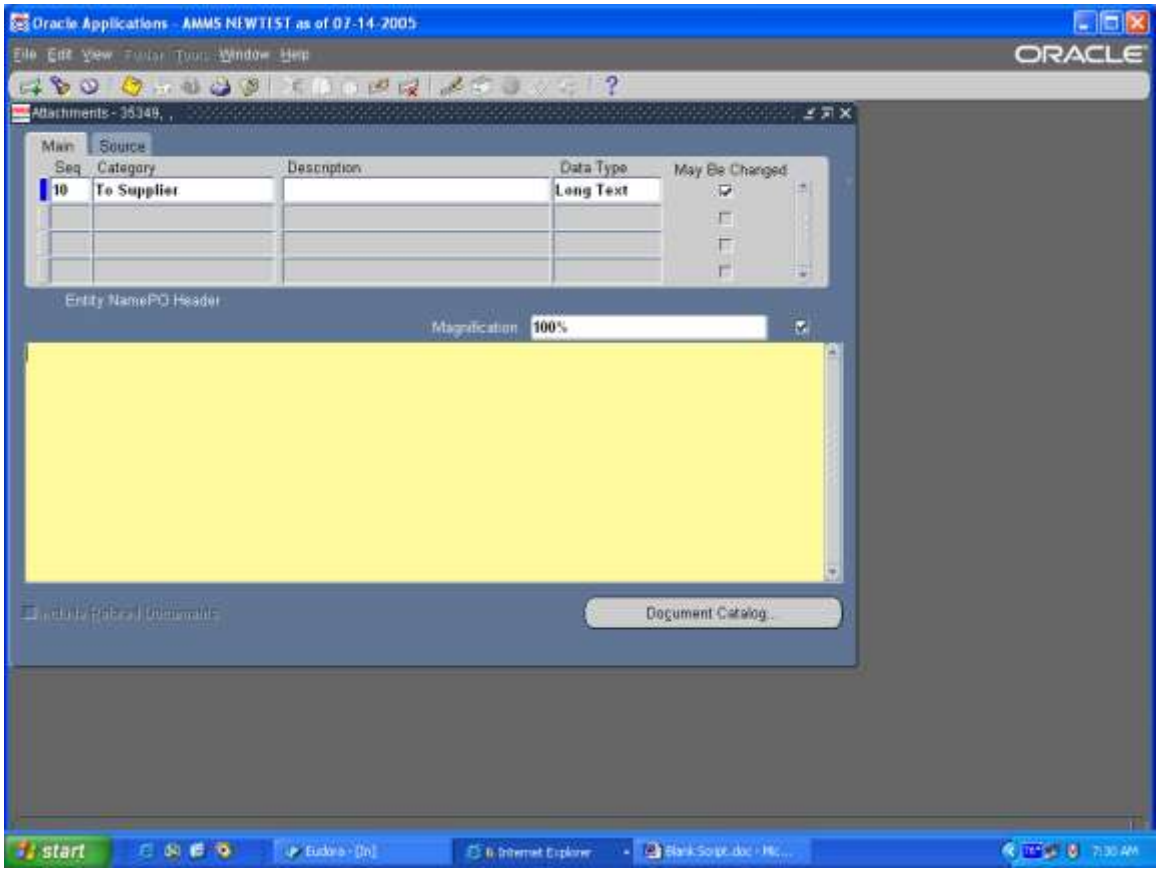
Step Description: When you have created your purchase order, and you want the attachment at the header level, click on the paperclip on the tool bar

Expected Results: Attachment window will open



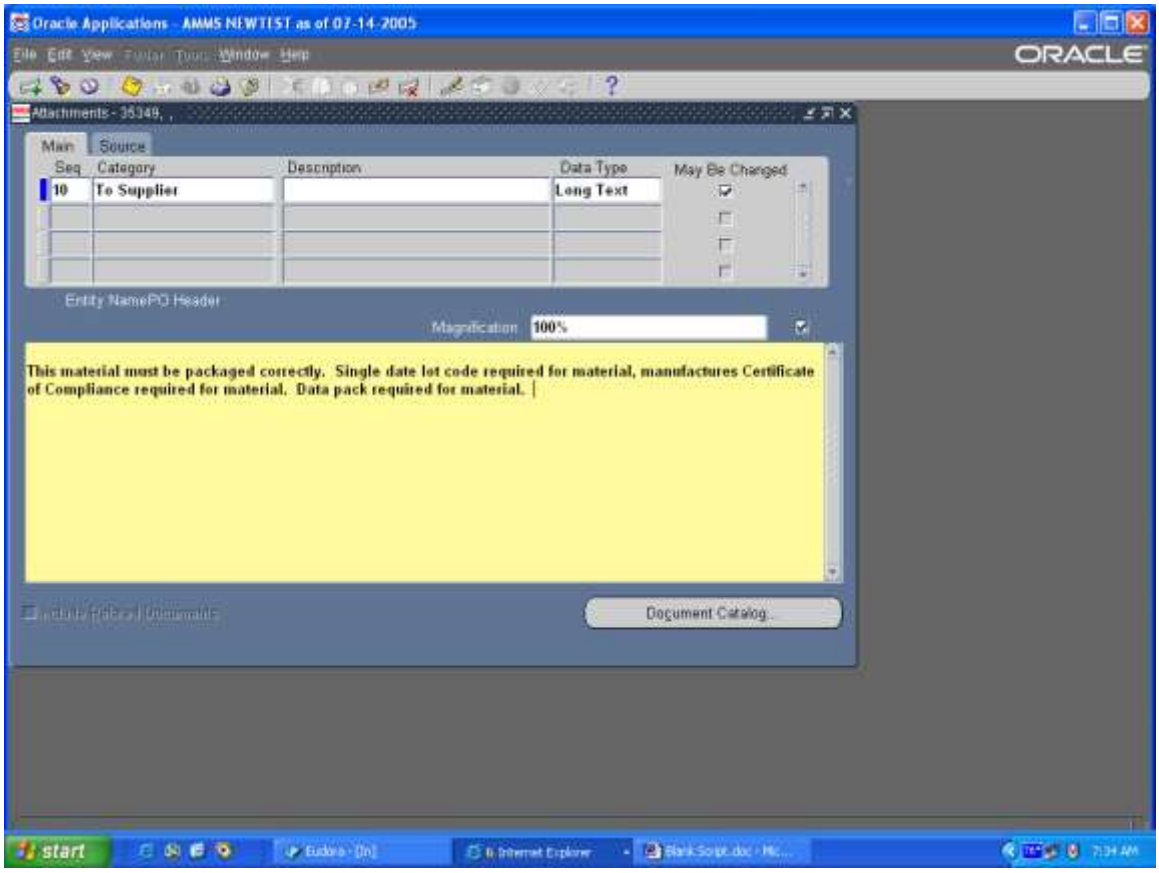
Step Description: In the Category field click on the LOV and then find who you want the attachment to go to, usually this is To Supplier, in the Data Type field, select Long or Short Text

Expected Results: Field will be populated, bottom portion of screen will be yellow.



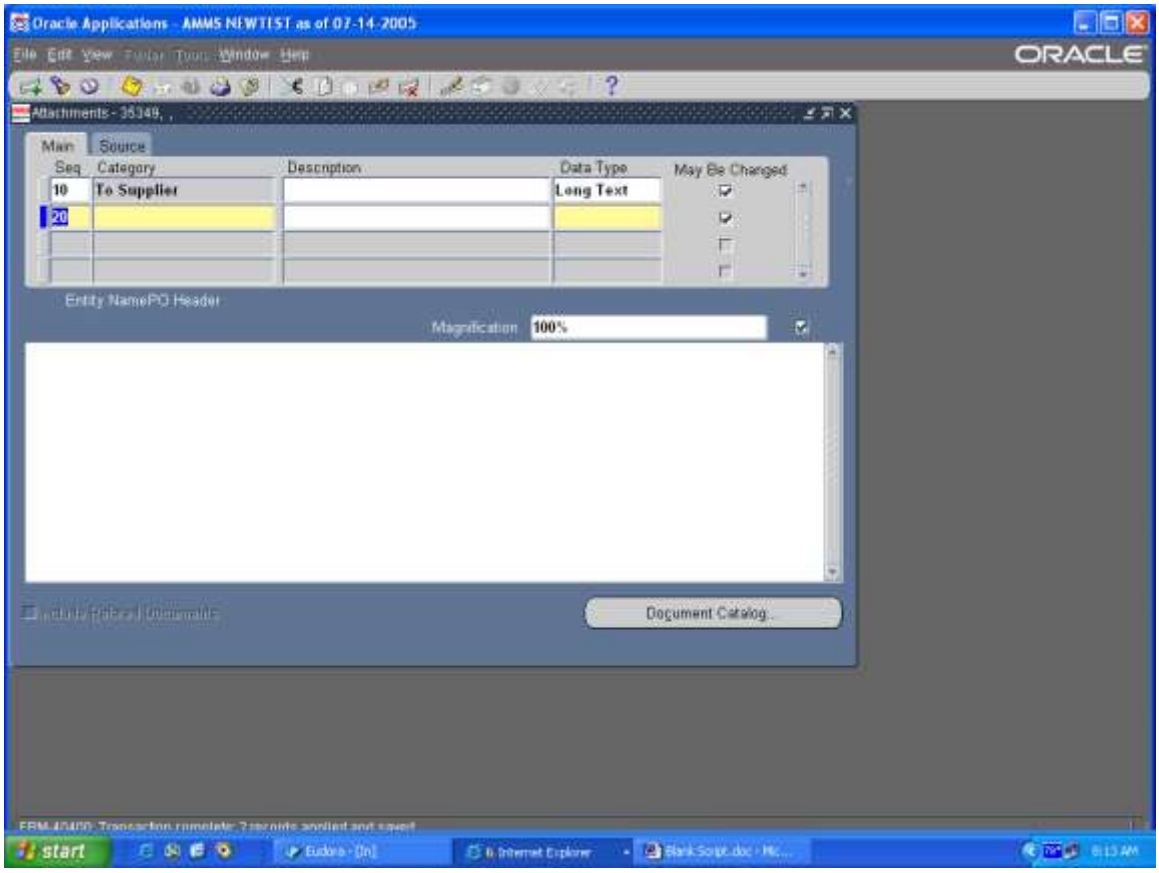
Step Description: At the bottom of the screen, hit the enter button once to move down one line, then type in any important information that the Supplier must know about the purchase order.

Expected Results: Field will have data



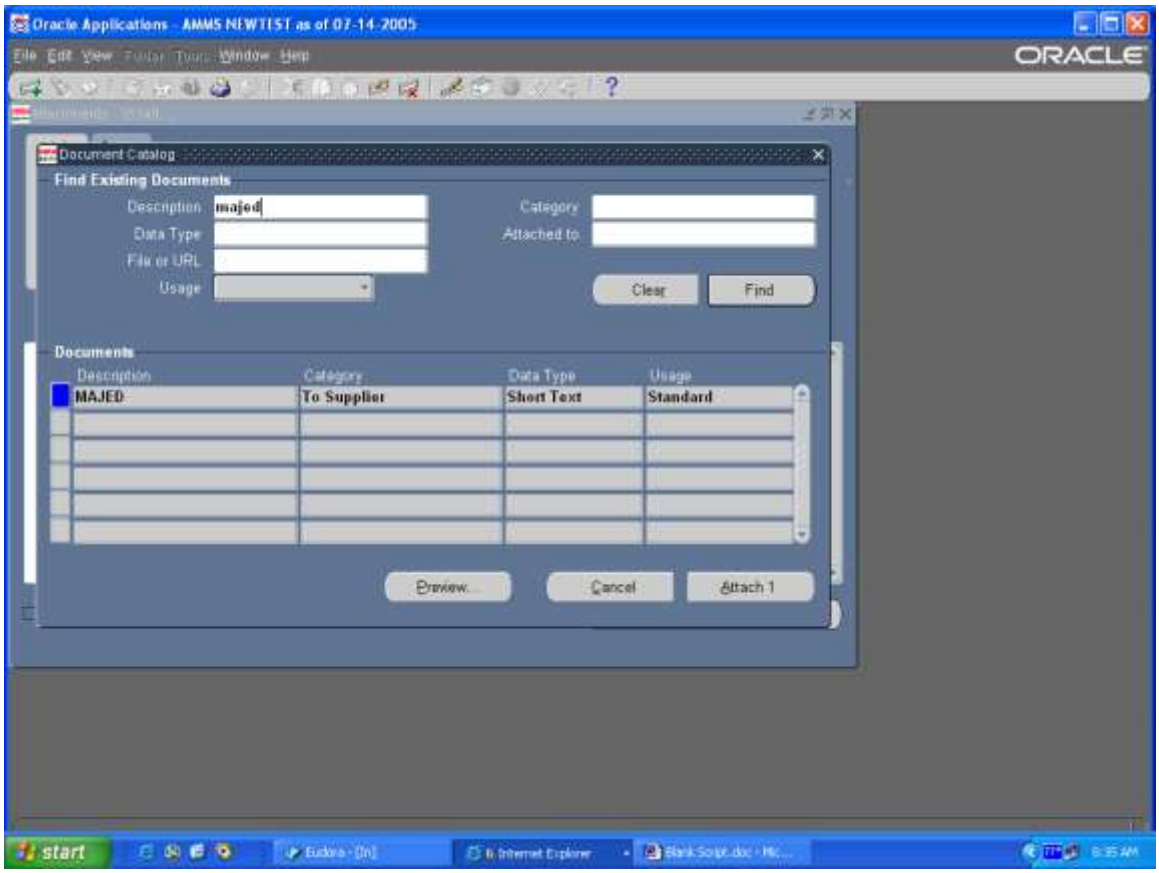
Step Description: If you have a standard attachment for every purchase order, with the curser in the Category field, click on the Document Catalog button at the bottom of the window.

Expected Results: Document Catalog window will appear



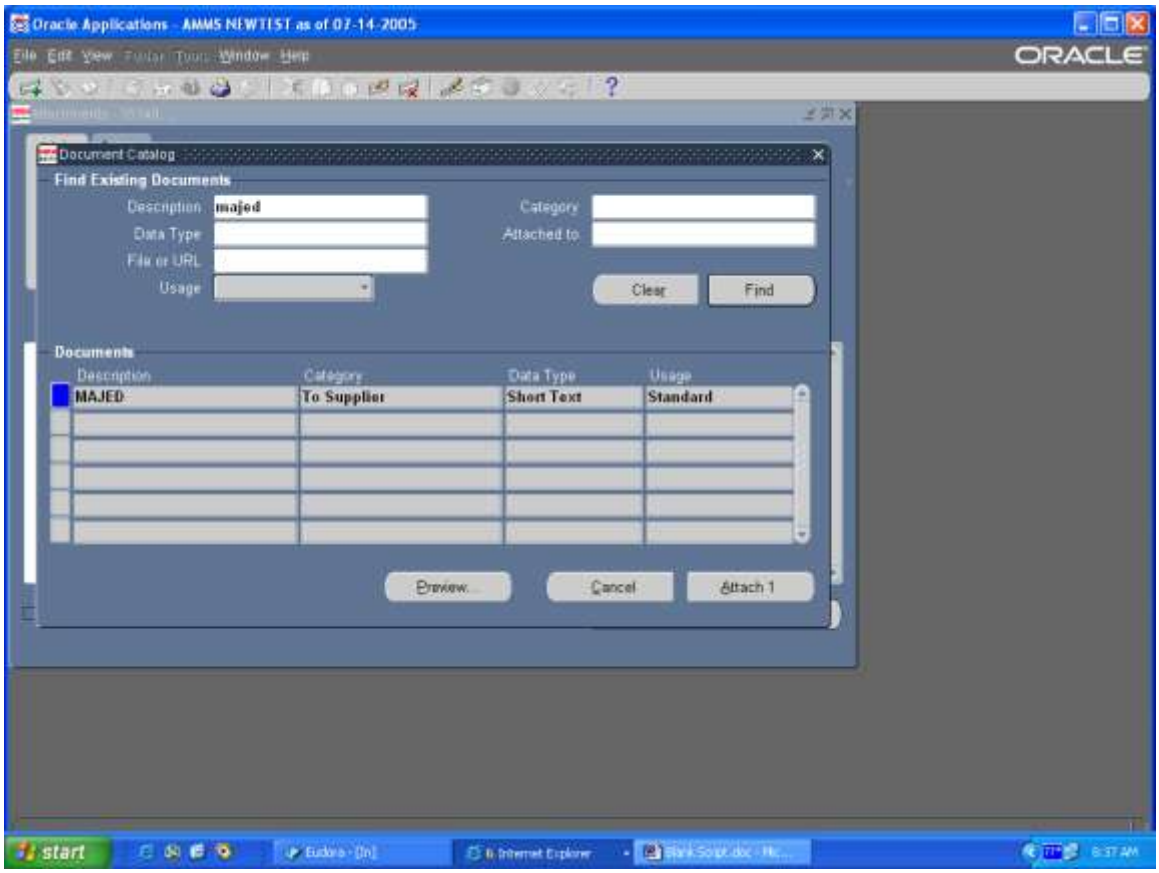
Step Description: In the Description field type in the name of the standard attachment then click on the Find button

Expected Results: Name of standard attachment will appear at the bottom of the screen



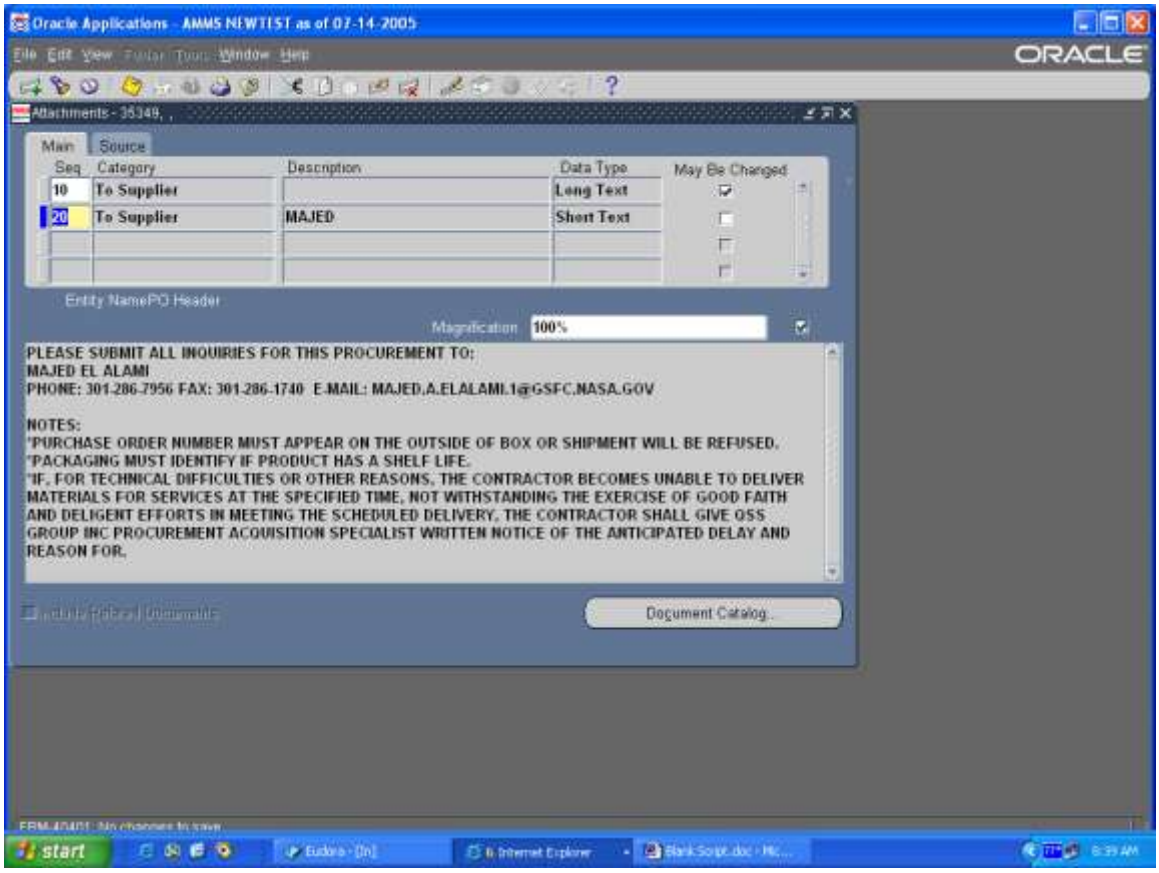
Step Description: Select the attachment that is to go onto the purchase order, and then click the Attach 1 button

Expected Results: Return to Attachment window



Step Description: You can add as many attachments at needed to a purchase order. When you have added all of your attachments, click on the Save icon, then close the attachment window

Expected Results: Return to Autocreate Purchase Order window.



AMMS TRAINING SCRIPT

JIT Expiration Date

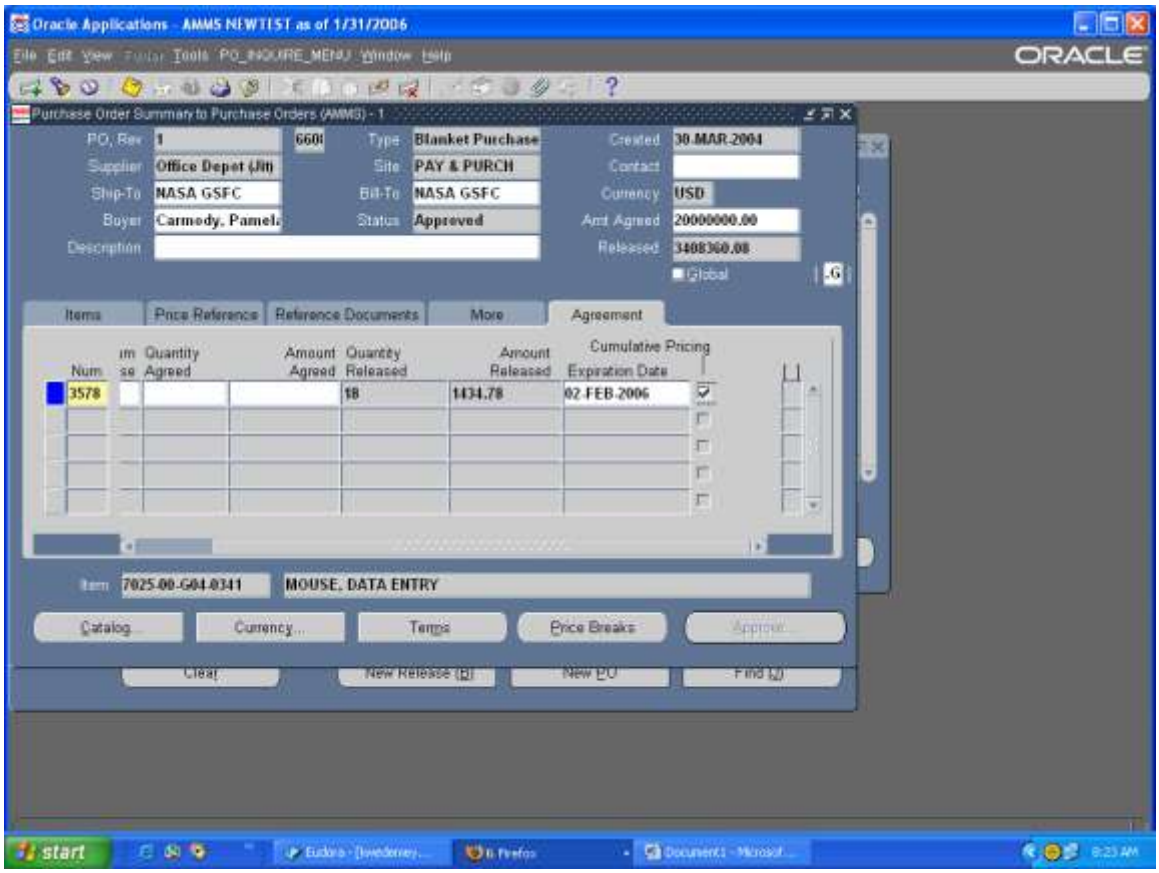
Purpose

The purpose of this training script is to show how to reset the JIT expiration date.

Audience

Purchasing Manager

Prepared By	Theresa Coulson
Creation Date:	02/03/2006
Document Name	JIT Expiration Date.doc
Version	2
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Purchasing.	



Click on the Agreement Tab, scroll to the right, in the Expiration Date field, click on the LOV and select a date, or enter a date. Save and Approve the PO.

AMMS TRAINING SCRIPT

Manual Closure of Purchase Order, Blanket Purchase Order, and Blanket Purchase Order Release

Purpose

The purpose of this training script is to explain how to manually close a purchase order, blanket purchase order, or blanket purchase order release.

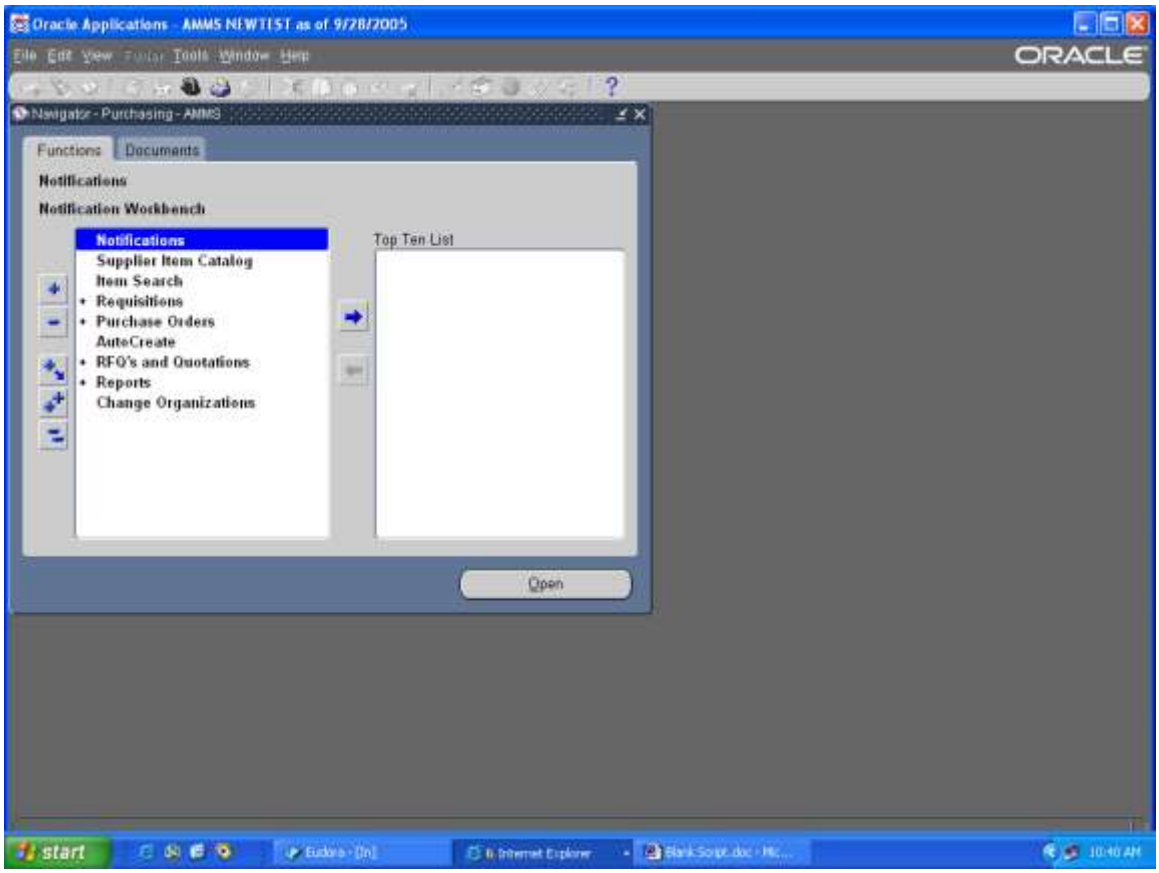
Audience

Buyers

Prepared By	Theresa Coulson
Creation Date:	11/17/2005
Document Name	Manually Close Purchase Orders.doc
Version	2
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Purchasing.	

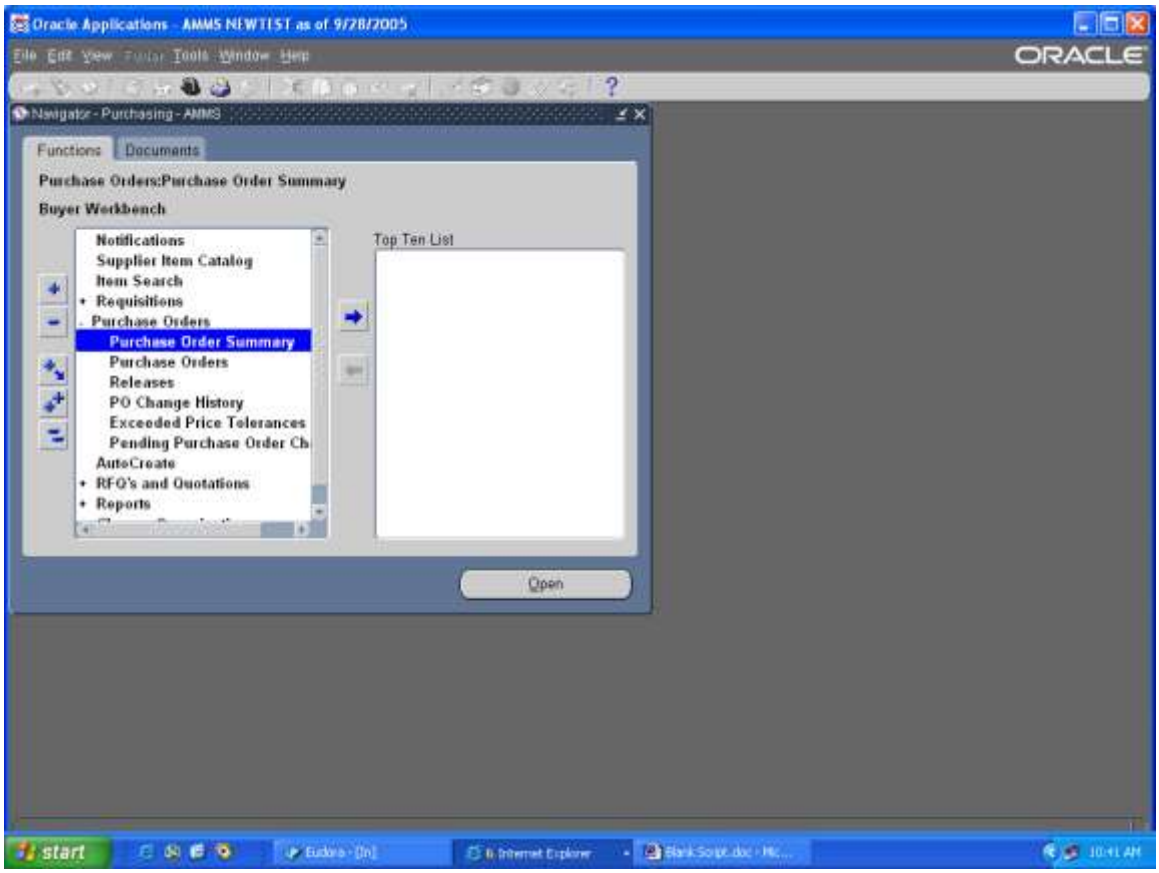
Step Description: Sign onto Oracle and select Purchasing AMMS responsibility

Expected Results: Purchasing AMMS main menu will appear



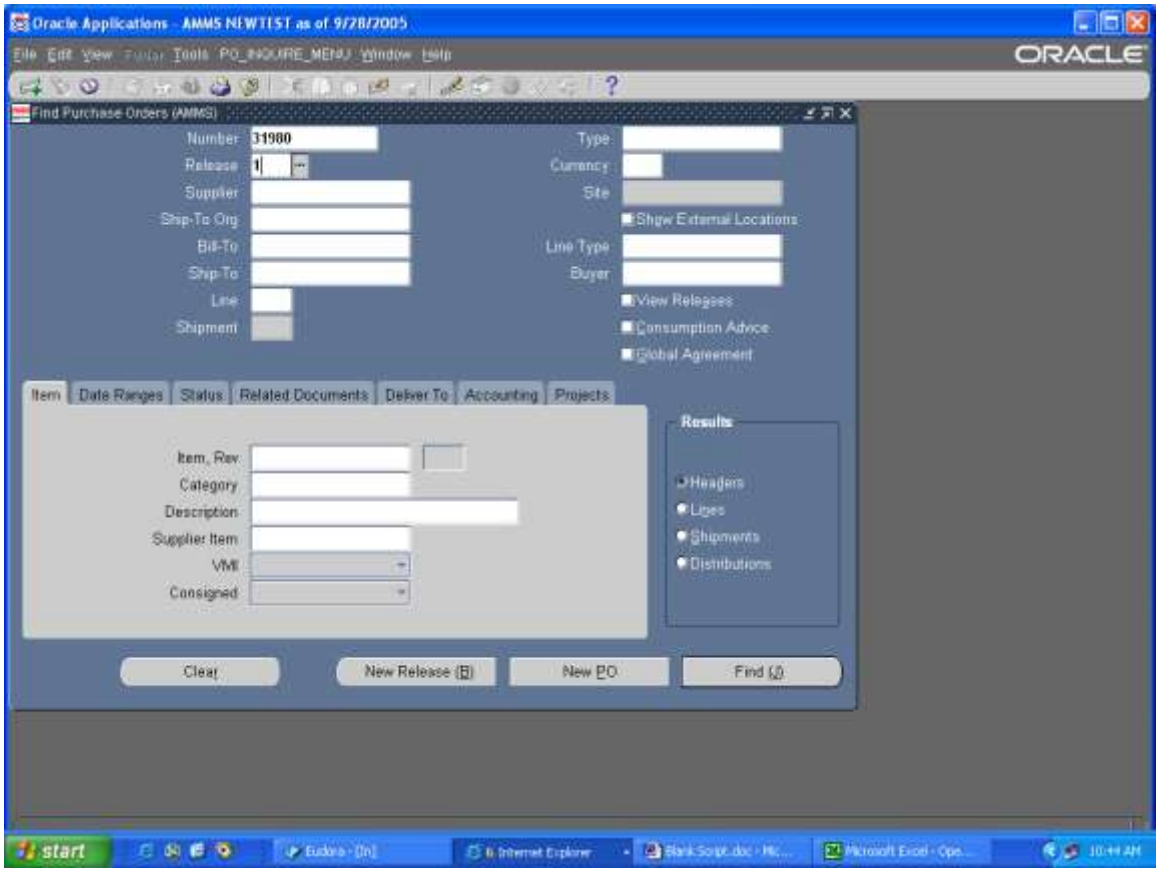
Step Description: From the Purchasing AMMS main menu select, Purchase Orders > Purchase Order Summary click on the Open button

Expected Results: Find Purchase Order window will appear



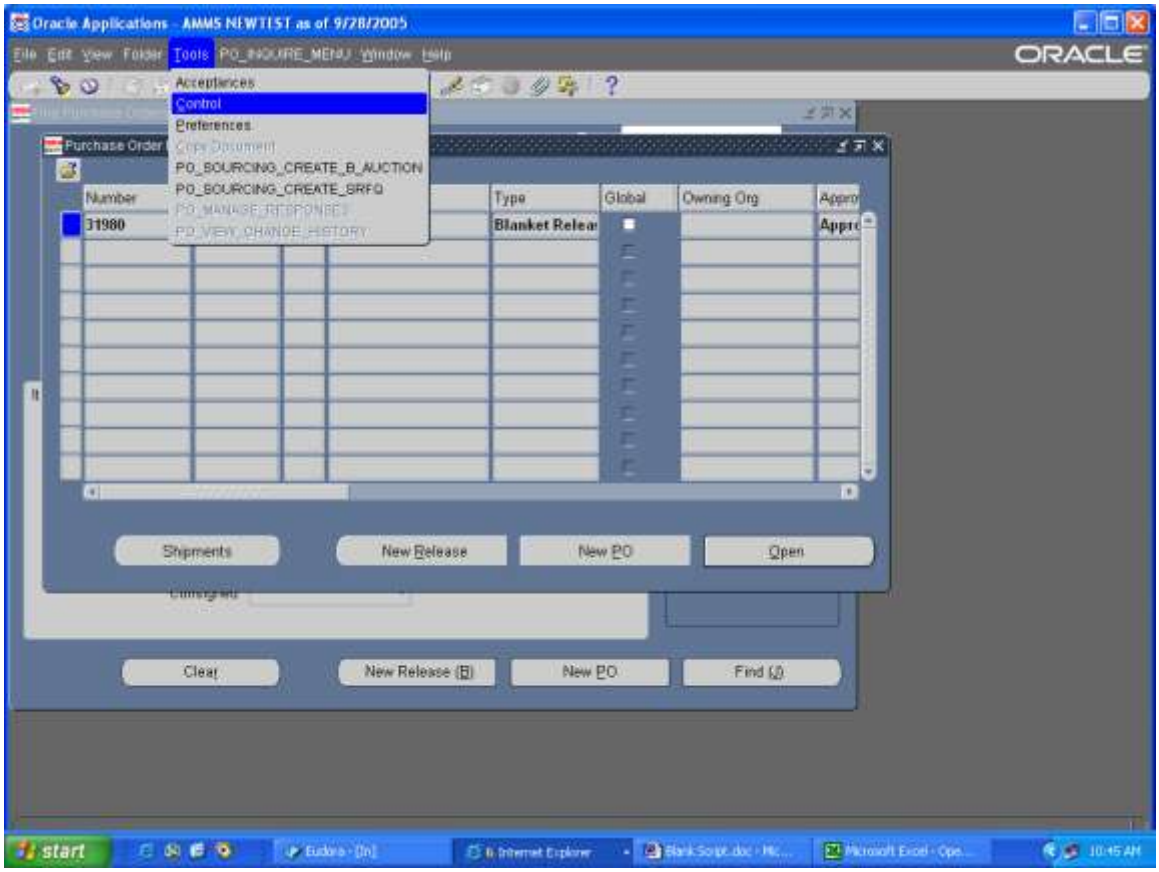
Step Description: In the Number field enter the Purchase Order (PO) number, if you are doing a Blanket Purchase Order (BPA) also enter the Release number in the Release field. Click on the Find button.

Expected Results: Purchase Order Header window will appear



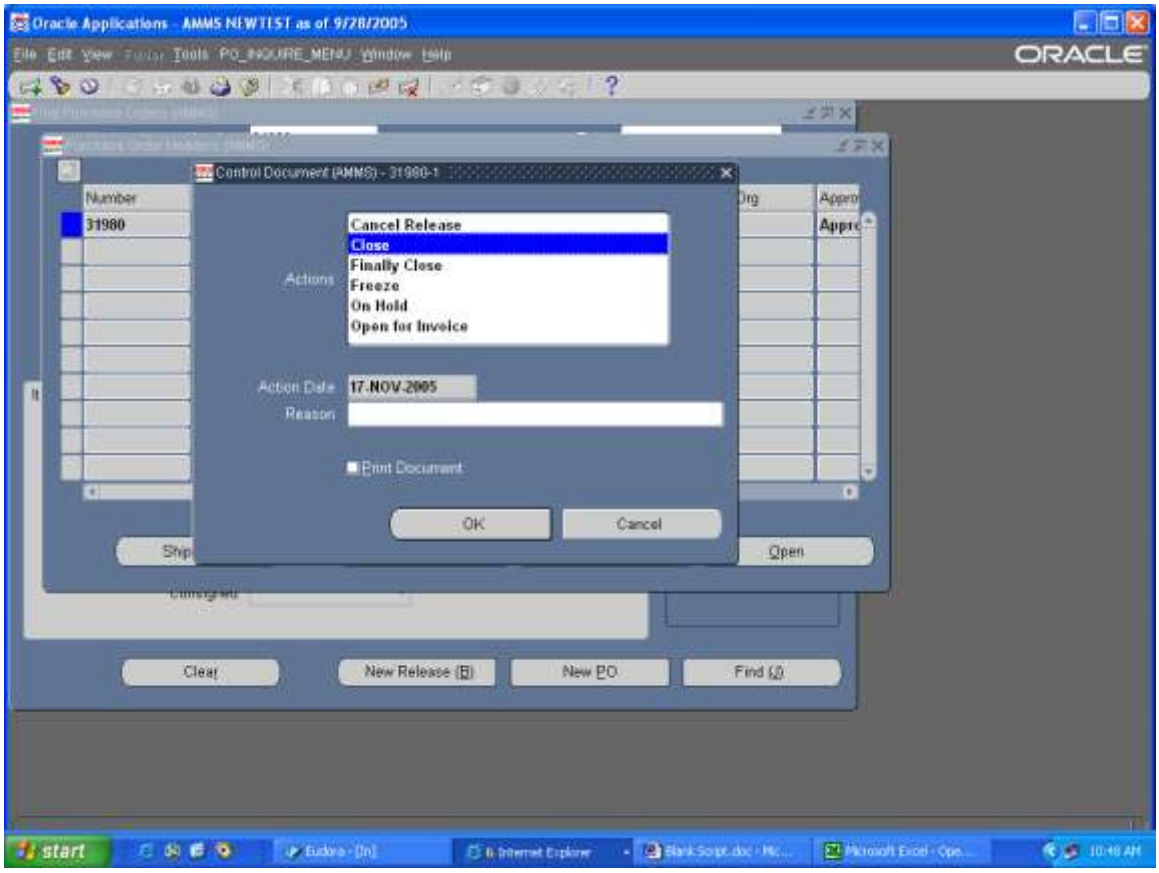
Step Description: From the tool-bar select, Tools > Control

Expected Results: Control Documents window will appear



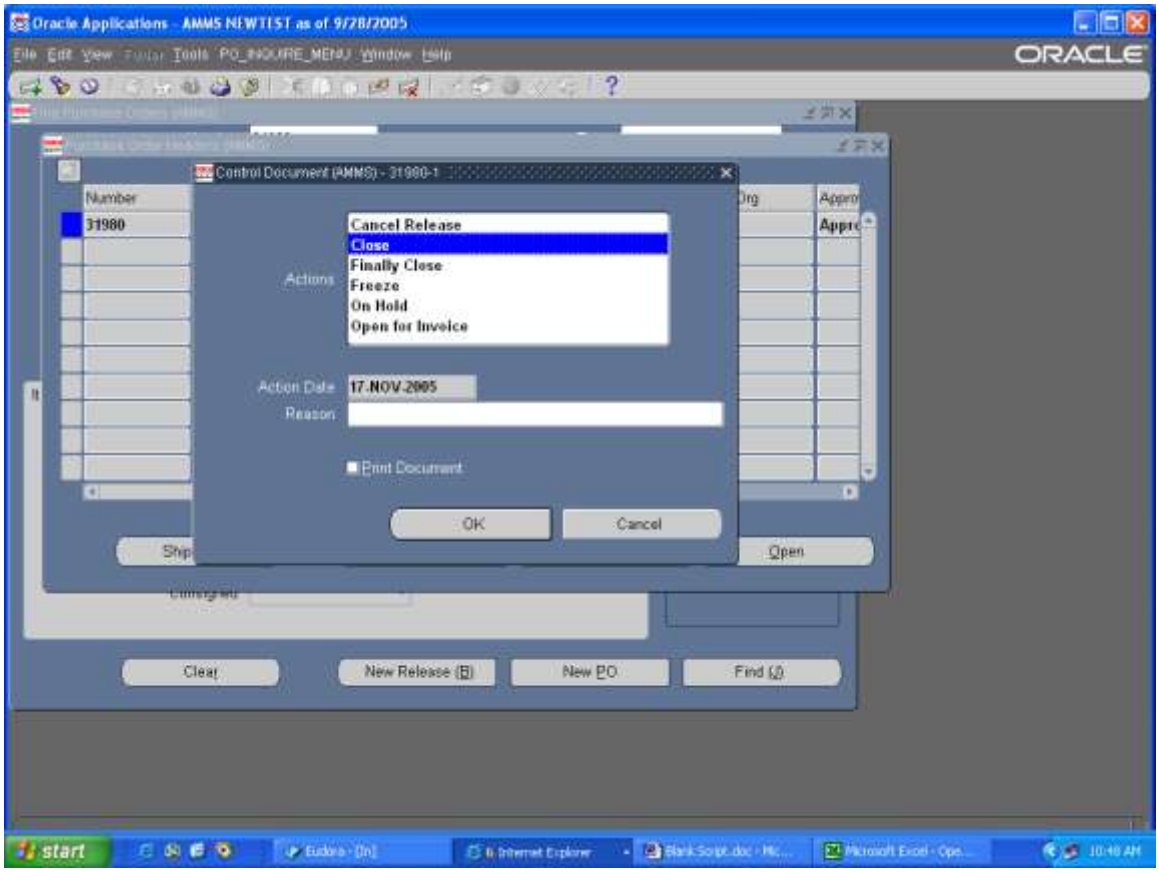
Step Description: From the list of Actions select CLOSE, highlight so that the line is blue. BE SURE THAT YOU ARE ON CLOSE, **DO NOT EVER SELECT FINALLY CLOSE.**

Expected Results: Close will be highlighted



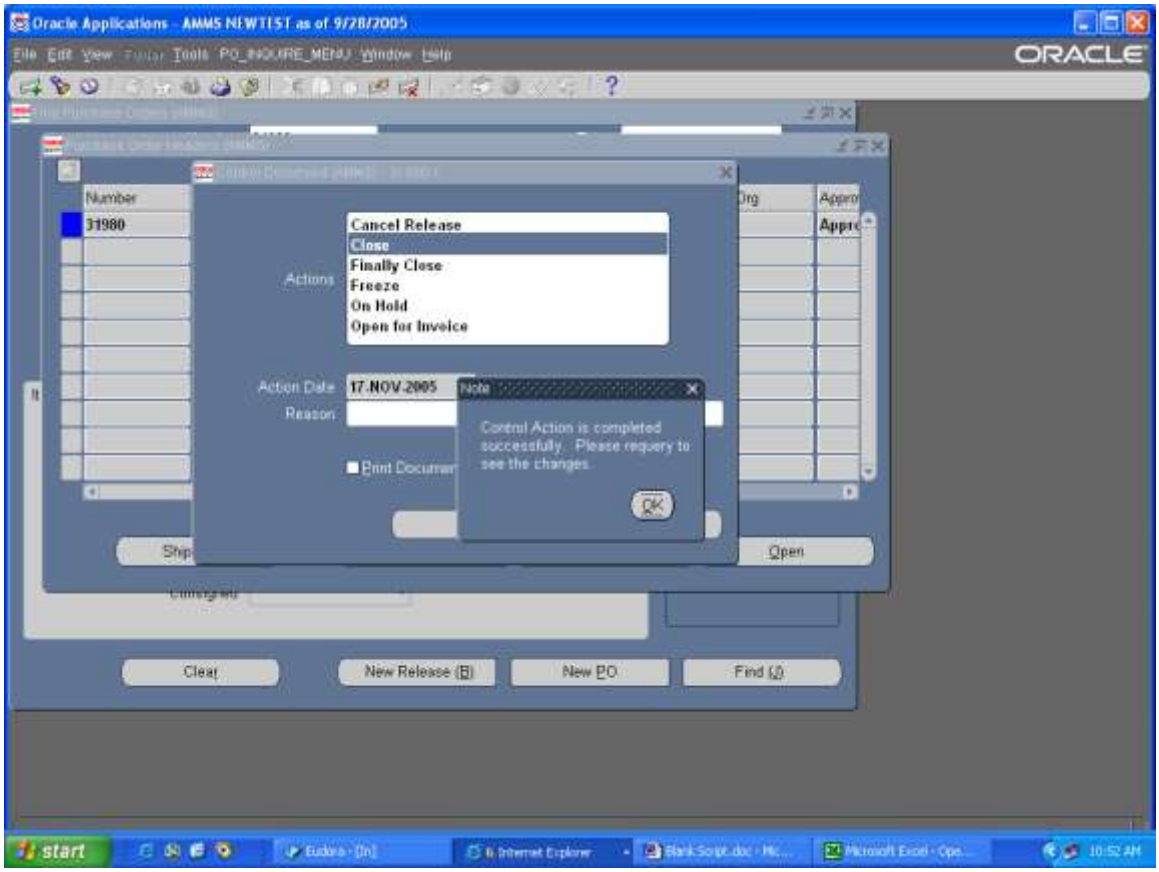
Step Description: After you have selected Close, click OK

Expected Results: Note window will appear



Step Description: Click OK to the Note window

Expected Results: Return to the Purchase Order Header window



Transactions complete, re-query to see results.

AMMS TRAINING SCRIPT

Notification Approval

Purpose

The purpose of this training script is to explain how to approve purchase orders that are forwarded for approval.

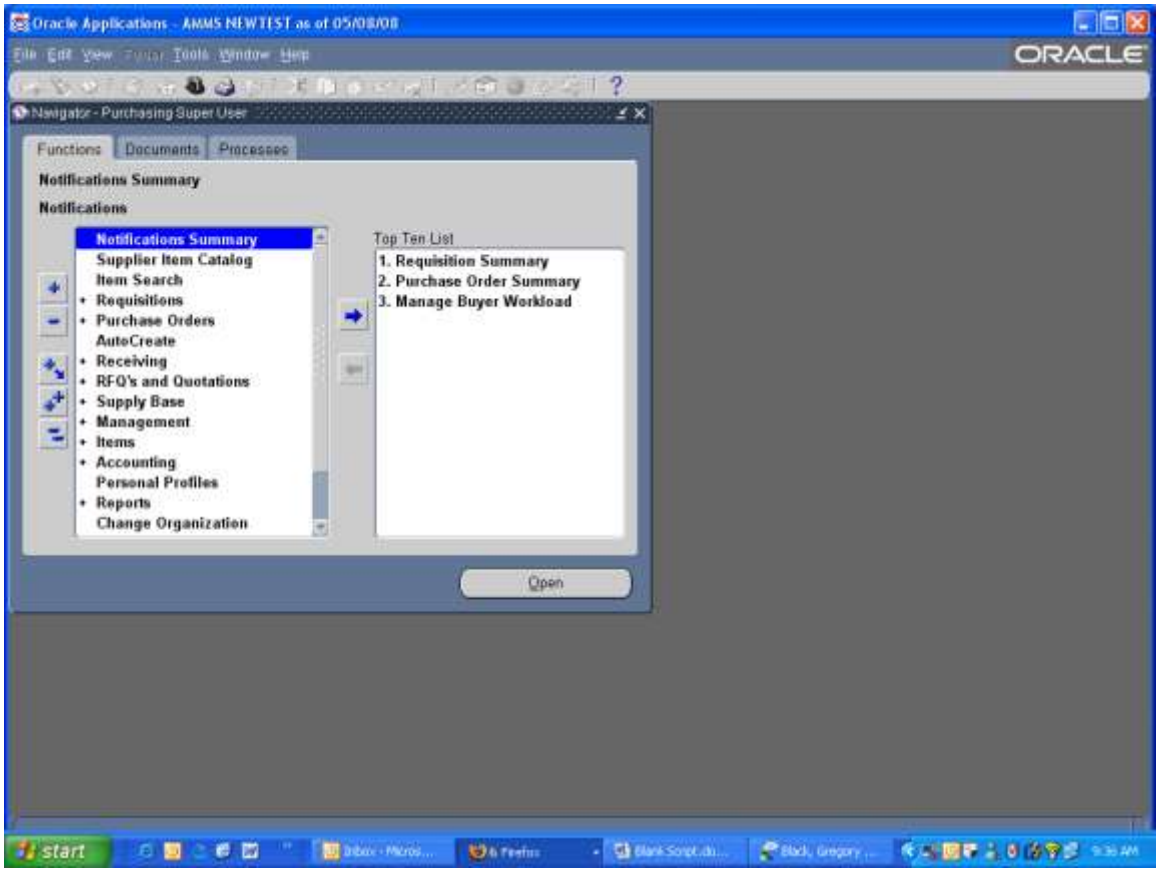
Audience

Buyers

Prepared By	Theresa Coulson
Creation Date:	07/09/2008
Document Name	Notifications Approval of Purchase Orders.doc
Version	2
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Purchasing.	

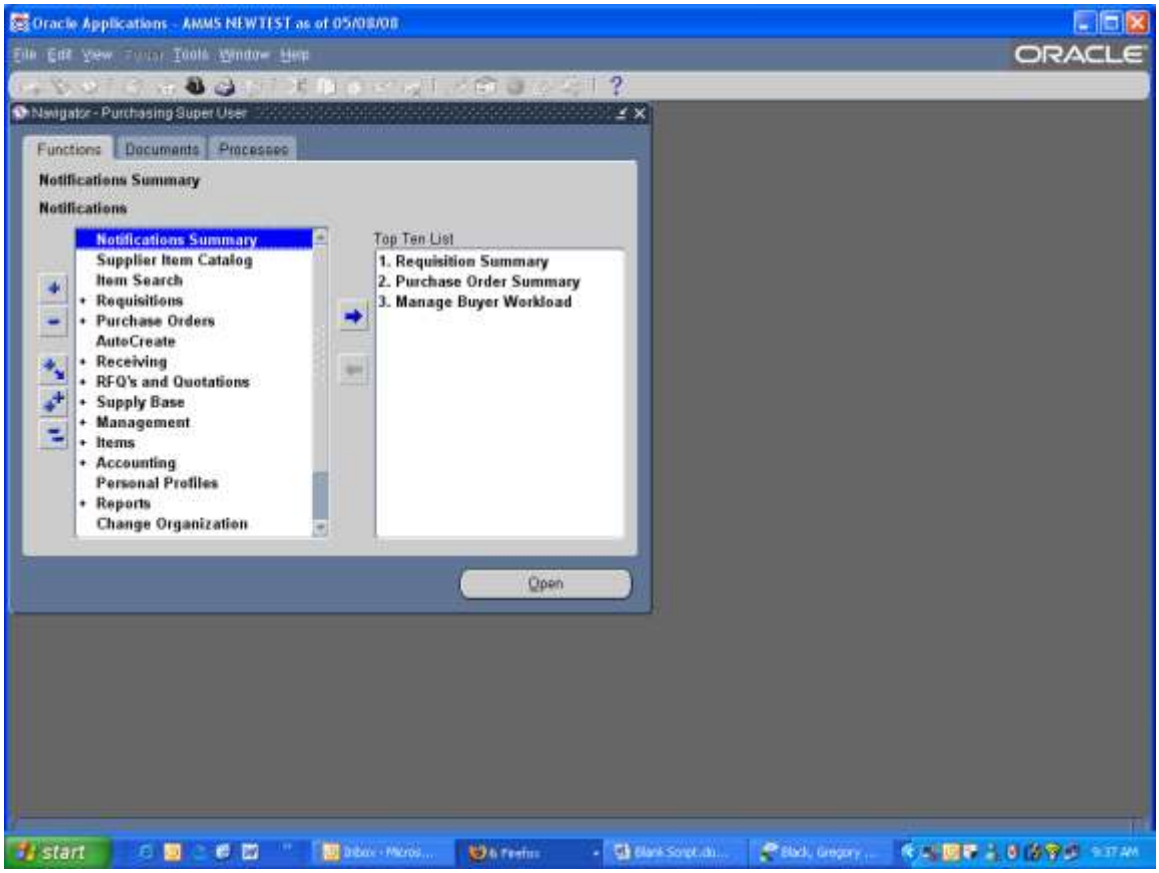
Step Description: Sign onto Oracle and select Purchase Super User Responsibility

Expected Results; Purchasing Super User main menu will appear



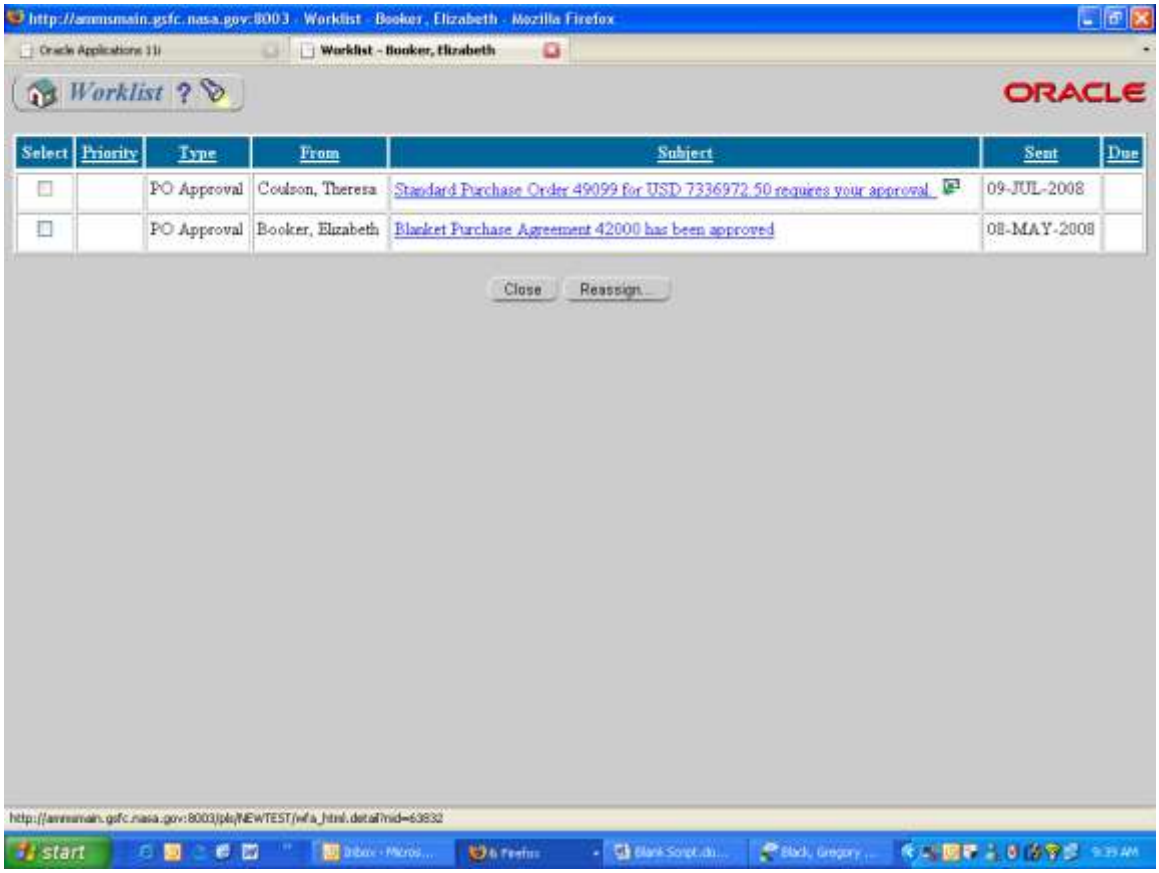
Step Description: From the Purchasing Super User Responsibility select Notifications Summary, click on open

Expected Results: Work list will appear



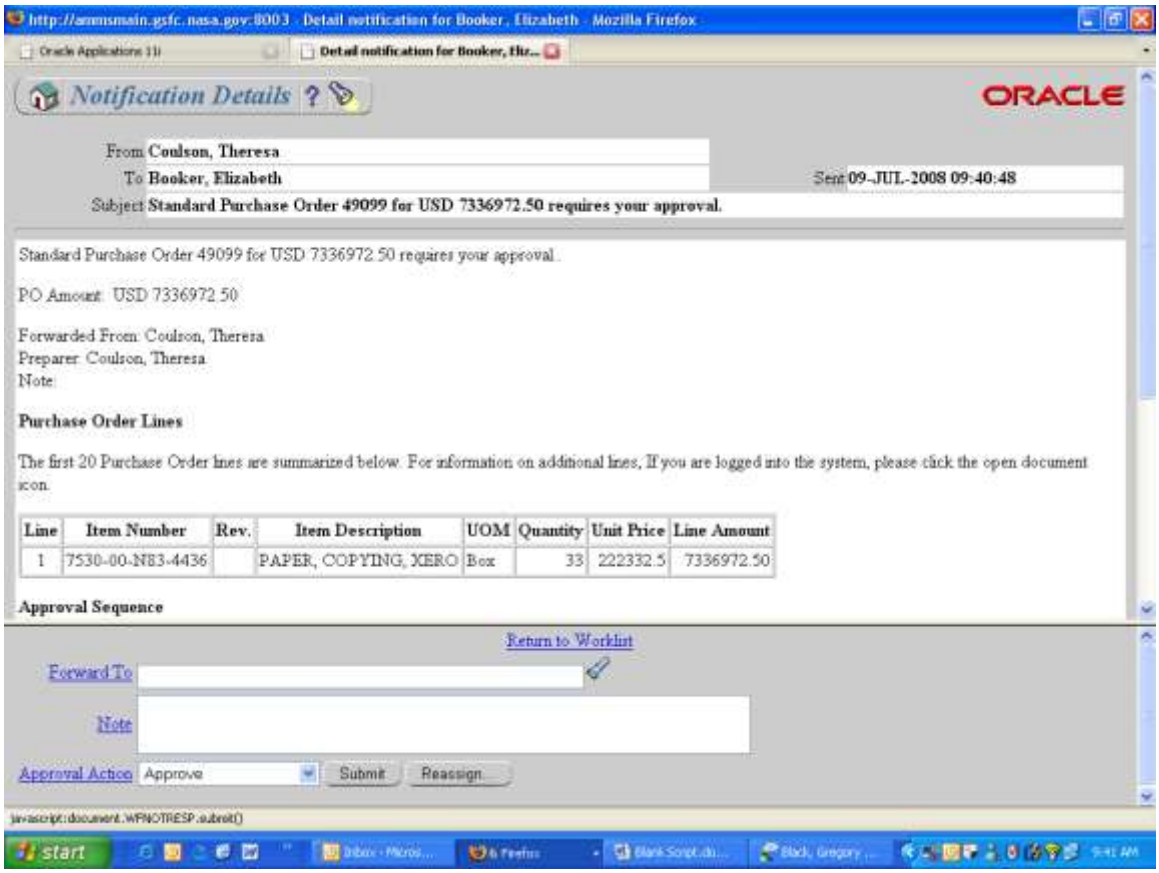
Step Description: Items that are on the Work List are items that are waiting for approval. Select the item you want to approve, click on the item name in the subject box.

Expected Results: Notifications Details box will appear



Step Description: This window give you details about the purchase order. The Approval Action box should be defaulted to Approve, click on the Submit Button to Approve the PO

Expected Results: You will return to the Work List



Step Description: If there are multiple Purchase Orders to approve repeat the process for each item

Expected Results: Purchase Orders are approved

AMMS TRAINING SCRIPT
Printed Copy of Purchase Order

Prepared by	**Theresa Coulson**
Author:	Theresa Coulson
Creation Date:	5/2/05
Version:	1
Last Updated:	11/24/2010

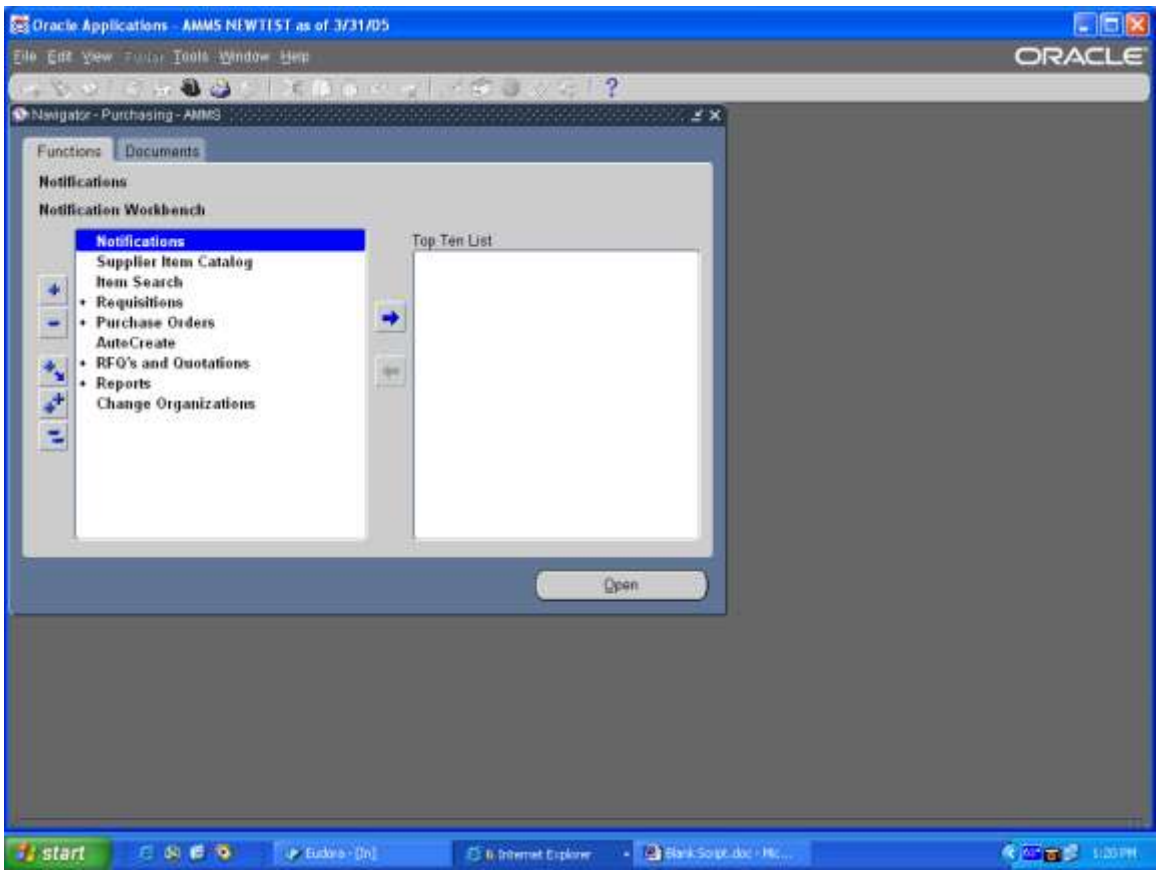
Buyers

AMMS Training Script:

This will show how to print out a purchase order

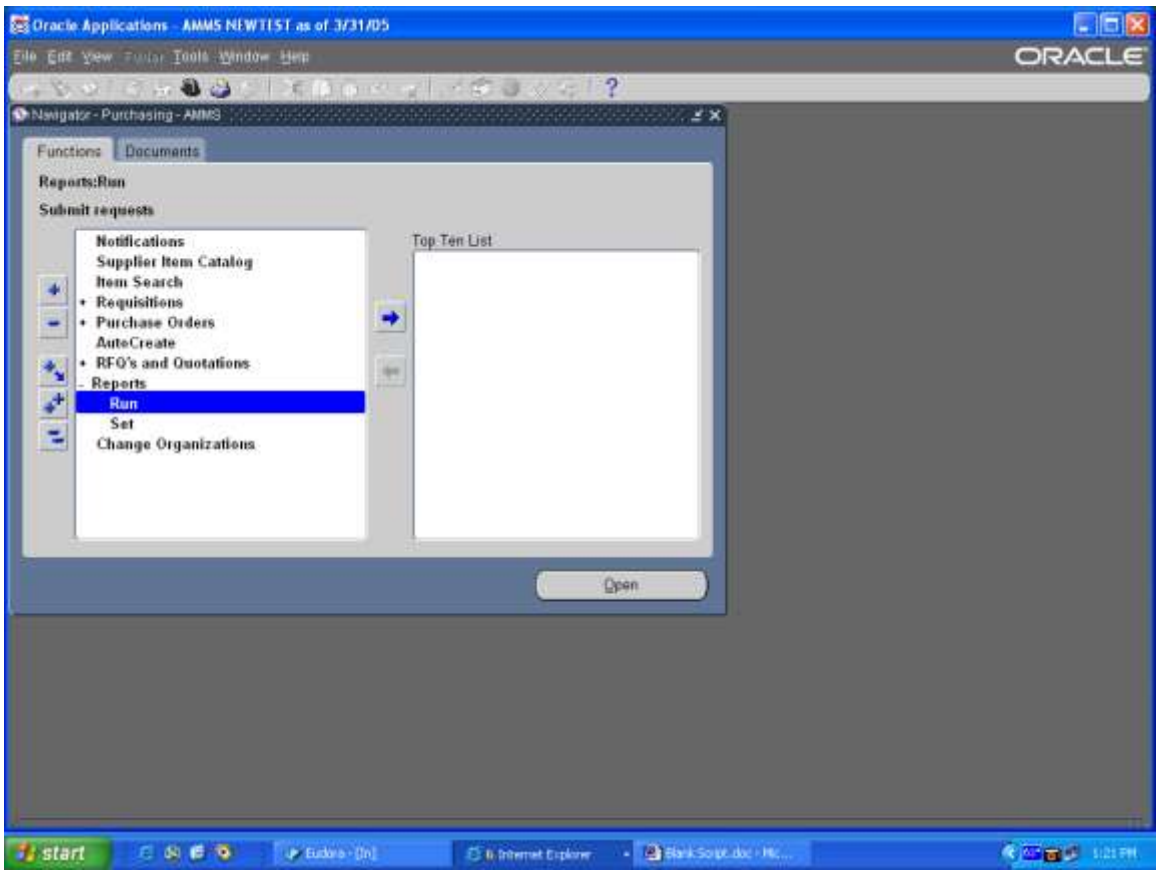
Step Description: Sign onto Oracle and select Purchasing AMMS responsibility

Expected Results: Purchasing AMMS main menu will appear



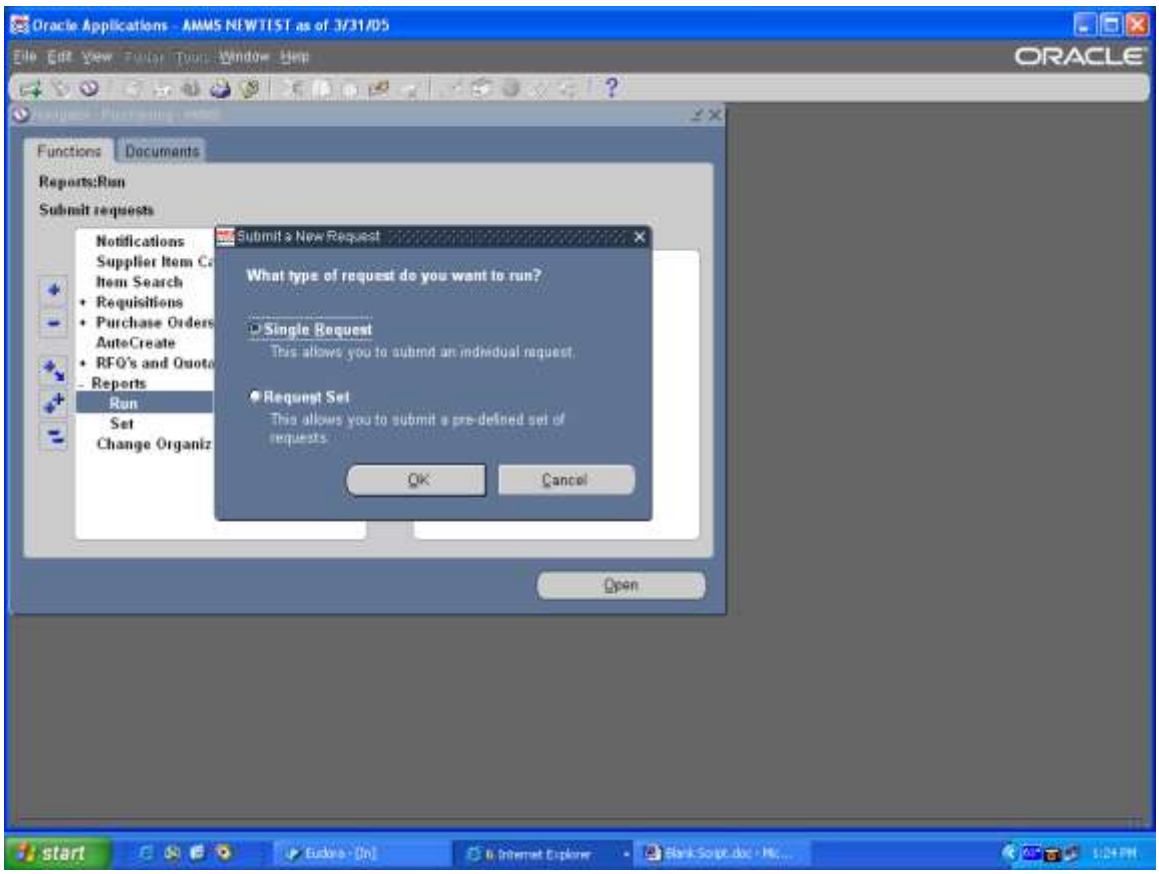
Step Description: From the Purchasing AMMS main menu select Reports > Run, click on the Open button

Expected Results: Submit a New Request window will appear



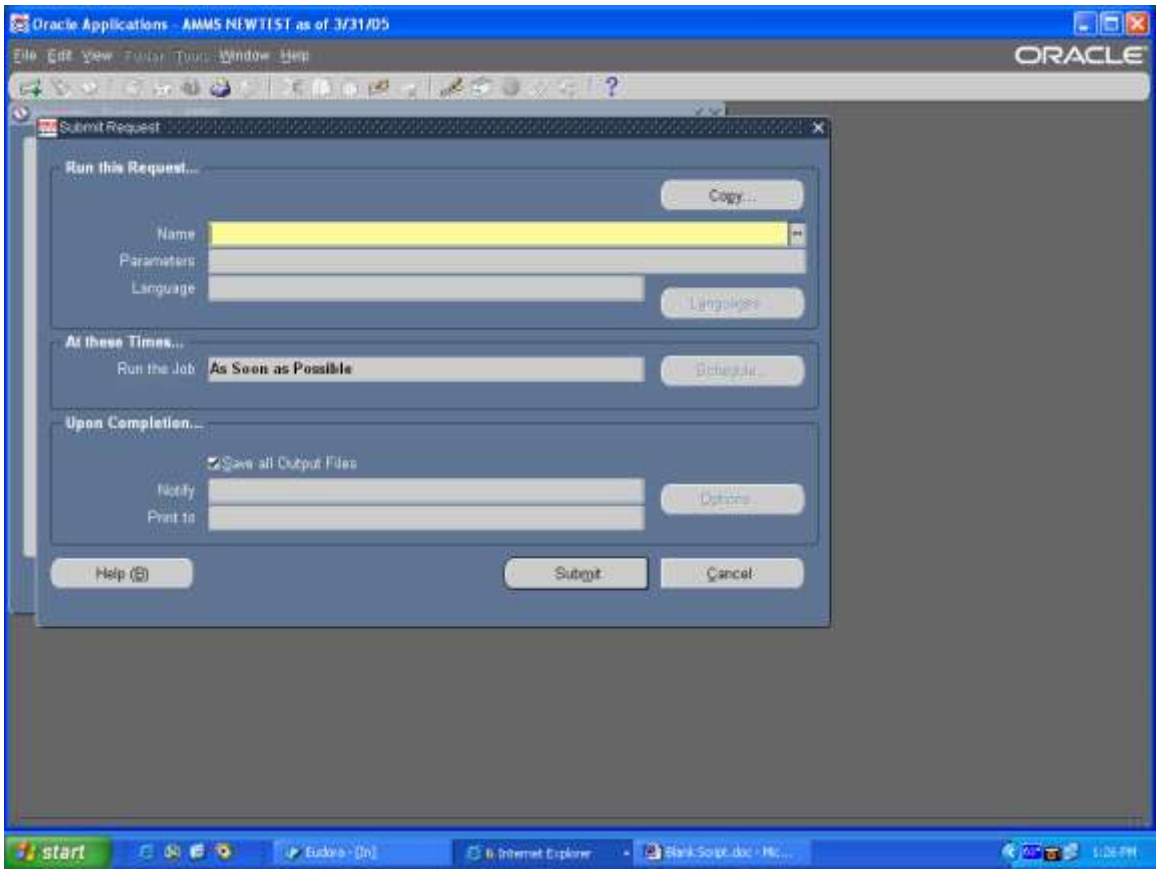
Step Description: From the Submit New Request window select Single request, click OK

Expected Results: Submit Request window will open



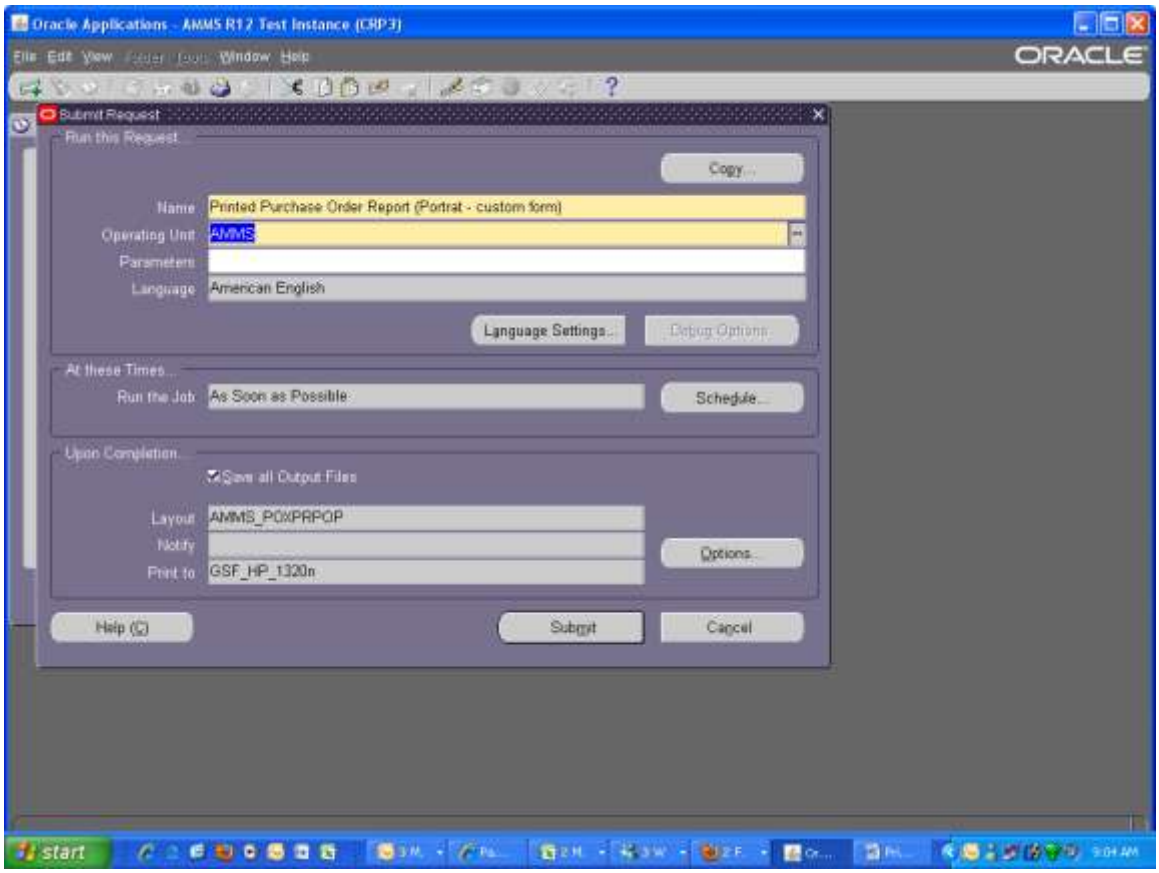
Step Description: In the Name click on the LOV

Expected Results: Reports window will appear



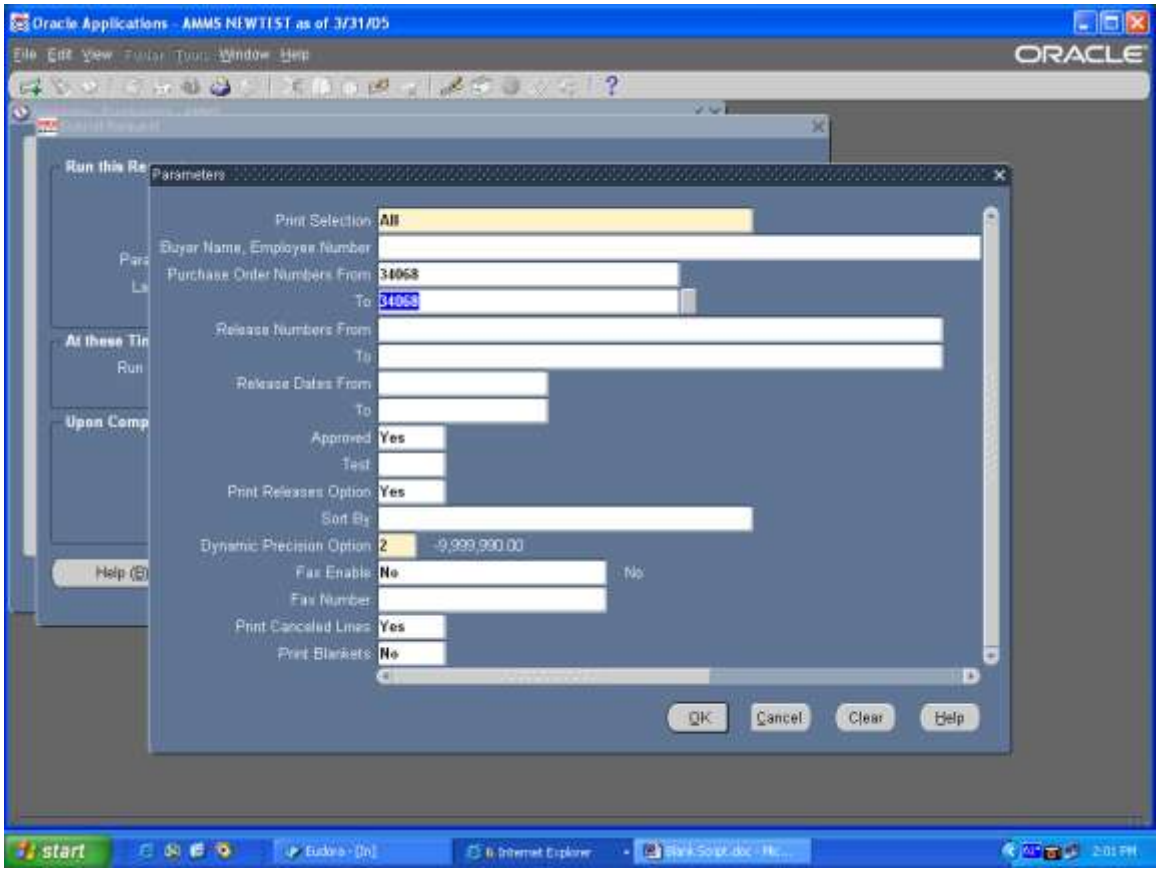
Step Description: From the list of reports find Printed Purchase Order Report (Portrait Custom Form)

Expected Results: Parameters window will appear



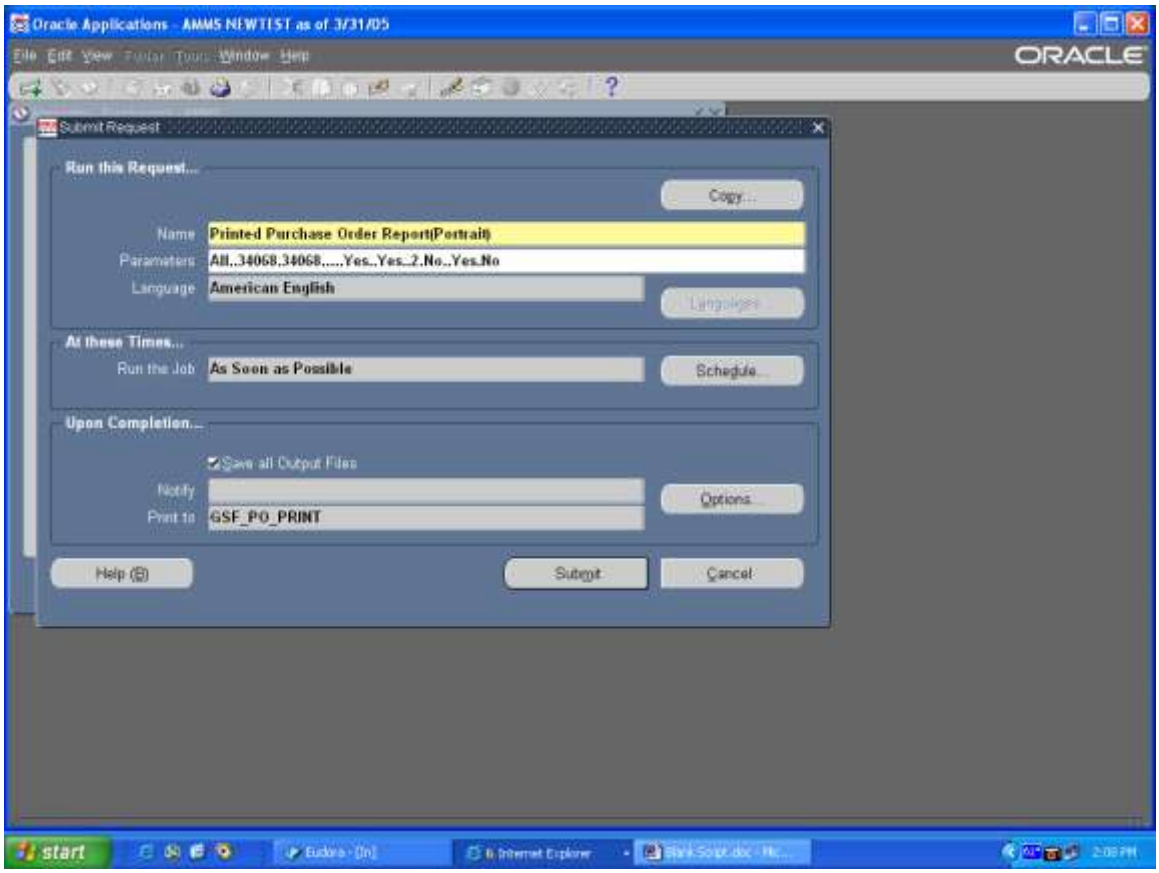
Step Results: In the Print Selection Field, click on the LOV and select ALL, in the Purchase Order Number From field, enter the PO number, in the Purchase Order Number To field enter the PO number. Change any other data as required Click OK

Expected Results: Fields will be populated, Return to Submit Request window



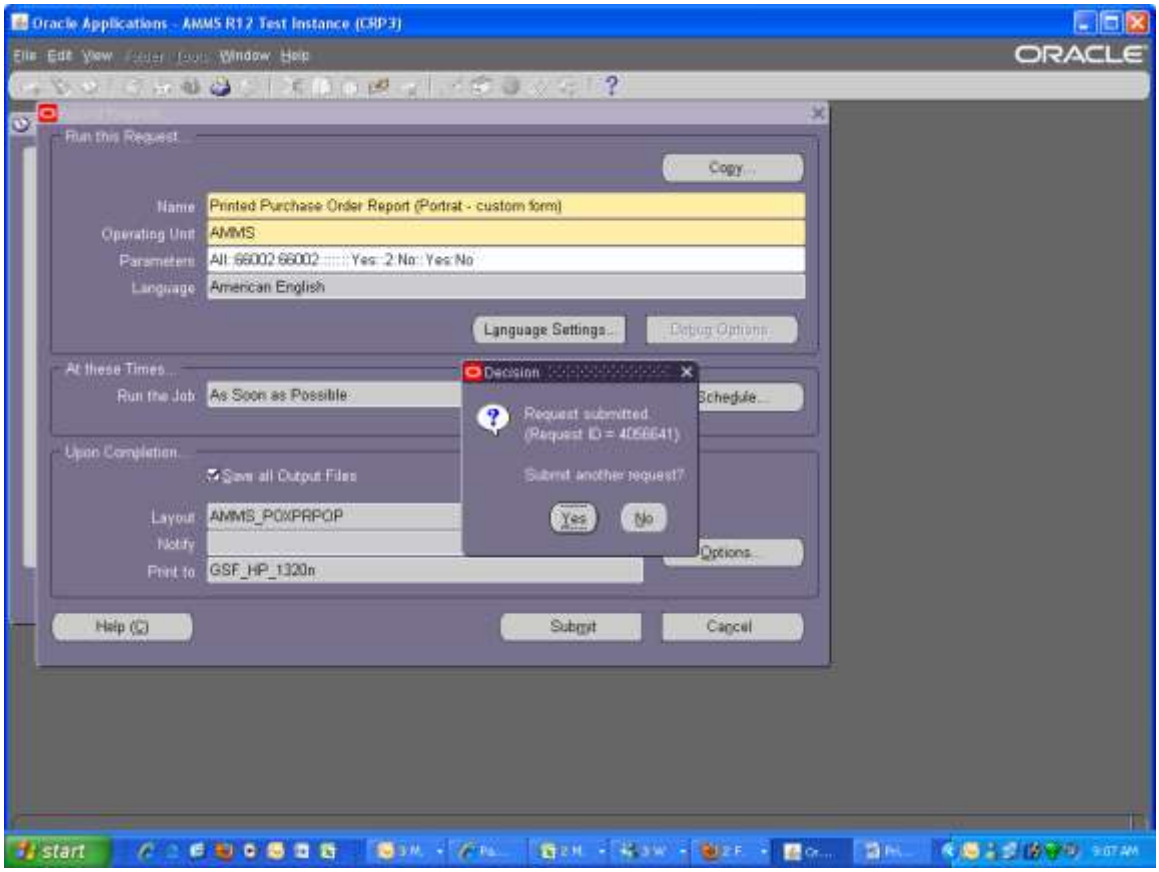
Step Description: Click on the Submit button

Expected Results: A decision window will appear



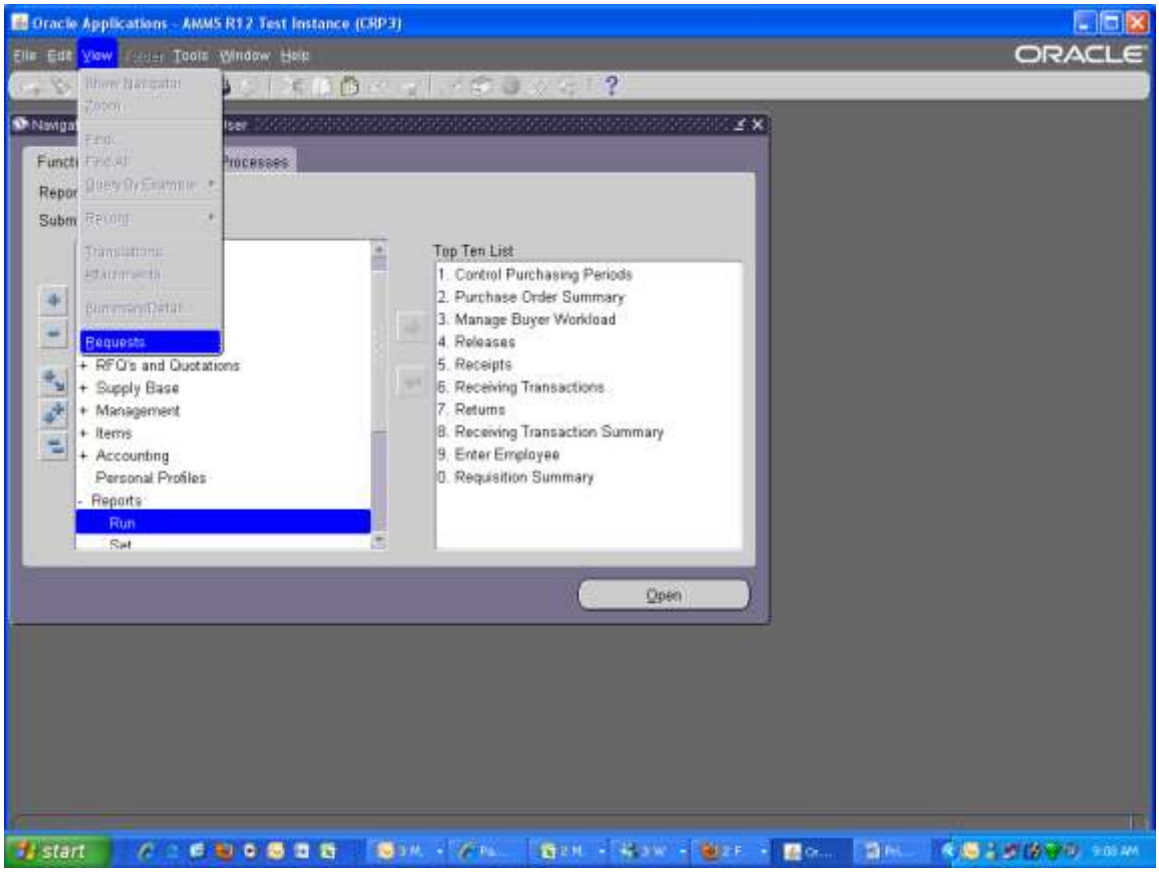
Step Description: Click No to the Decision

Expected Results: Window will go away, return to Purchasing main menu



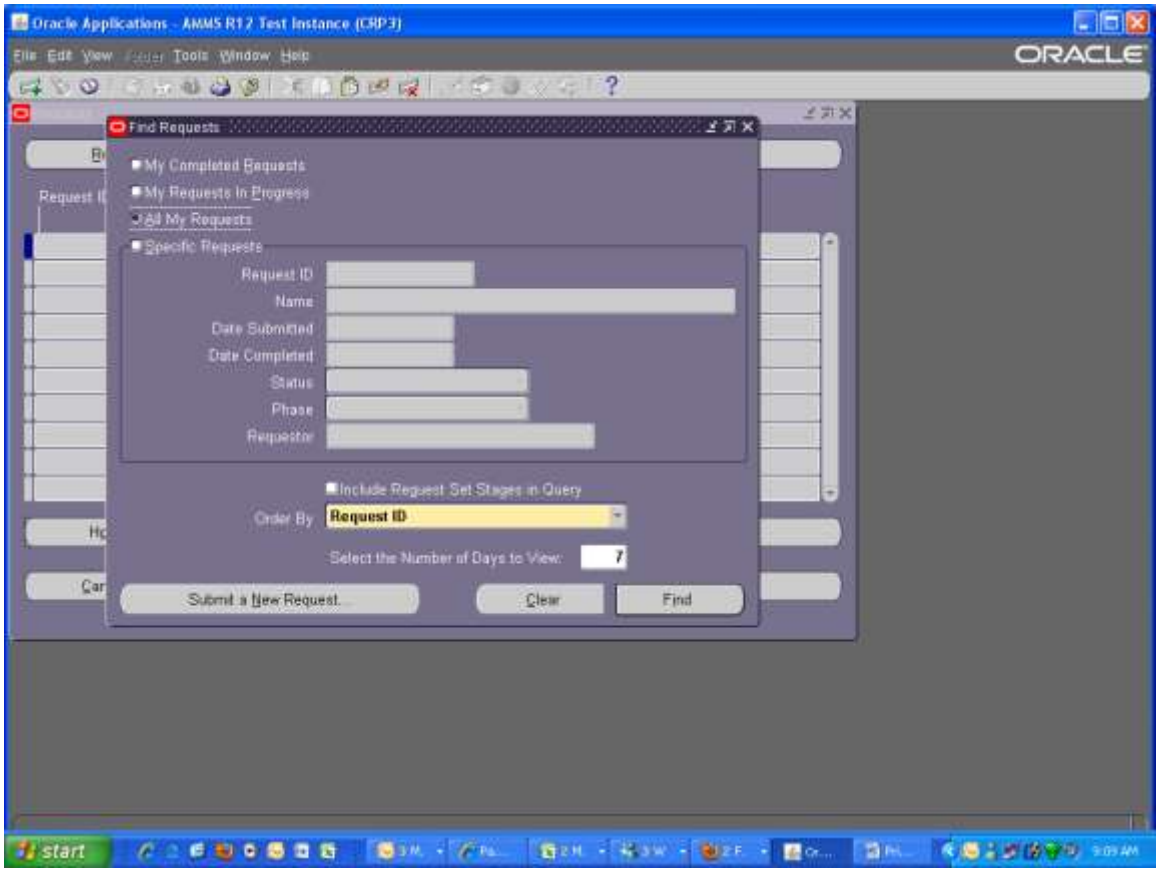
Step Description: From the Toolbar select View> Requests

Expected Results: Find Requests window will appear



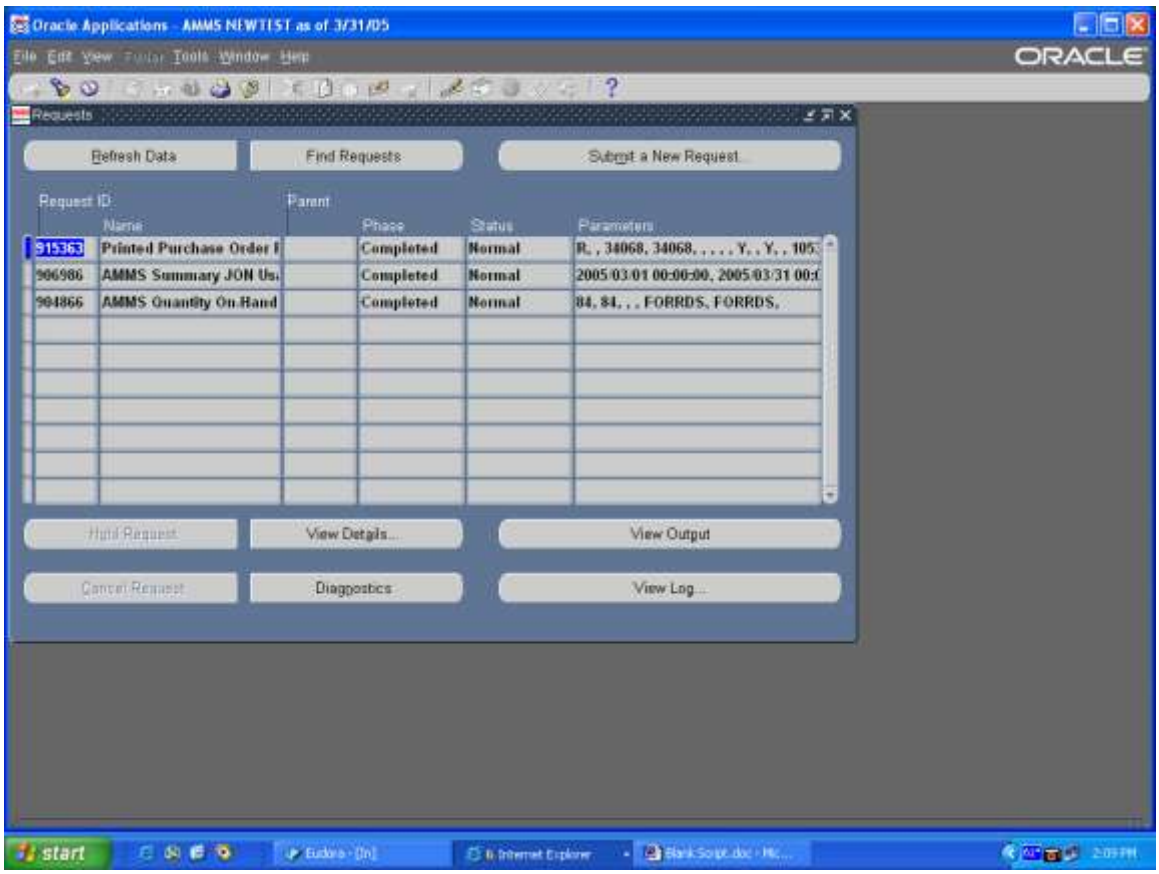
Step Description: Click Find on the Find Requests window

Expected Results: Your list of requests will appear



Step Description: Once the concurrent job has completed normal, click on the View Output button

Expected Results: PO will open in a PDF file



Step Description: Print the PO from the PDF file

Expected Results: PO will print

TRAX INTERNATIONAL

CODE 279
GODDARD SPACE FLIGHT CENTER
GREENBELT, MD 20771

PURCHASE ORDER

Page 1 of 2

PO# 66002 1
GL# GD.8525.20.1050.01.57000.000

ORDER TO
FRANK PARSONS INC.
1300 MERCEDES DR
HANOVER, MD 21076-3140
United States

SHIP TO
TRAX International Corp.
GSFC CODE 279
BLDG 16W
GREENBELT,MD 20771
United States

BILL TO TRAX International Corp. GSFC CODE 279 BLDG 16W GREENBELT,MD 20771

CONTACT E HOOD
PHONE (410) 737-7529
FAX 412 799-4143

CONTRACT: NASS-01091
DSM REQ-1 PRIORITY RATING DO-C9
F.O.B. DESTINATION

PO NO	PO DATE	BUYER	VENDOR	TERMS	SHIP VIA
66002	23-NOV-10	R Oster	274	NET 30	TRUCK

PURCHASE ORDER NOTES

PLEASE SUBMIT ALL INQUIRIES FOR THIS PROCUREMENT TO:
RACHEL OSTER PHONE 301-286-3727; FAX 301-286-1740; EMAIL Rachel.L.Oster@nasa.gov

AMMS TRAINING SCRIPT

Project Parts Create an Attachment to a Purchase Order

Purpose

The purpose of this training script is to show Buyers how to create an attachment to a Purchase Order. Attachments are added after any change to a purchase order.

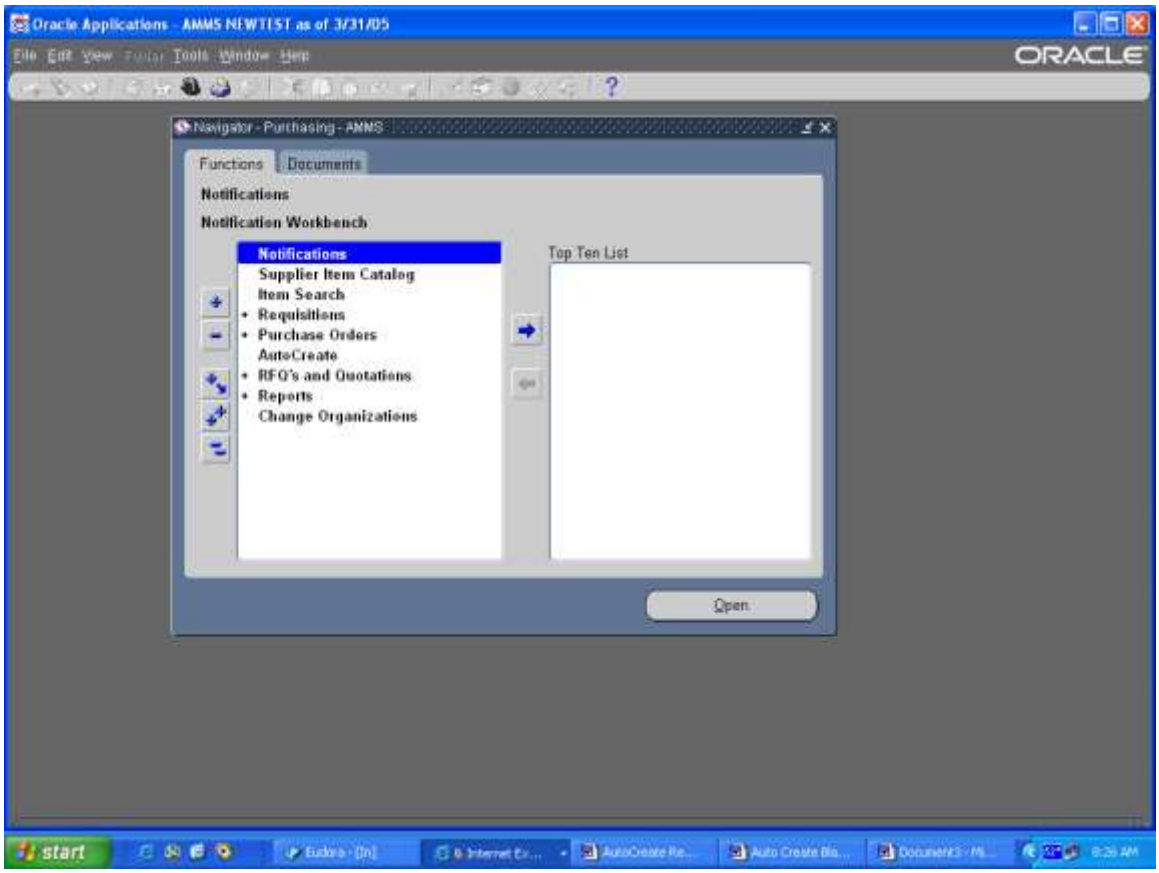
Audience

Buyers

Prepared By	Theresa Coulson
Creation Date:	04/26/2005
Document Name	Project Parts Adding Attachment to PO.doc
Version	4
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Purchasing.	

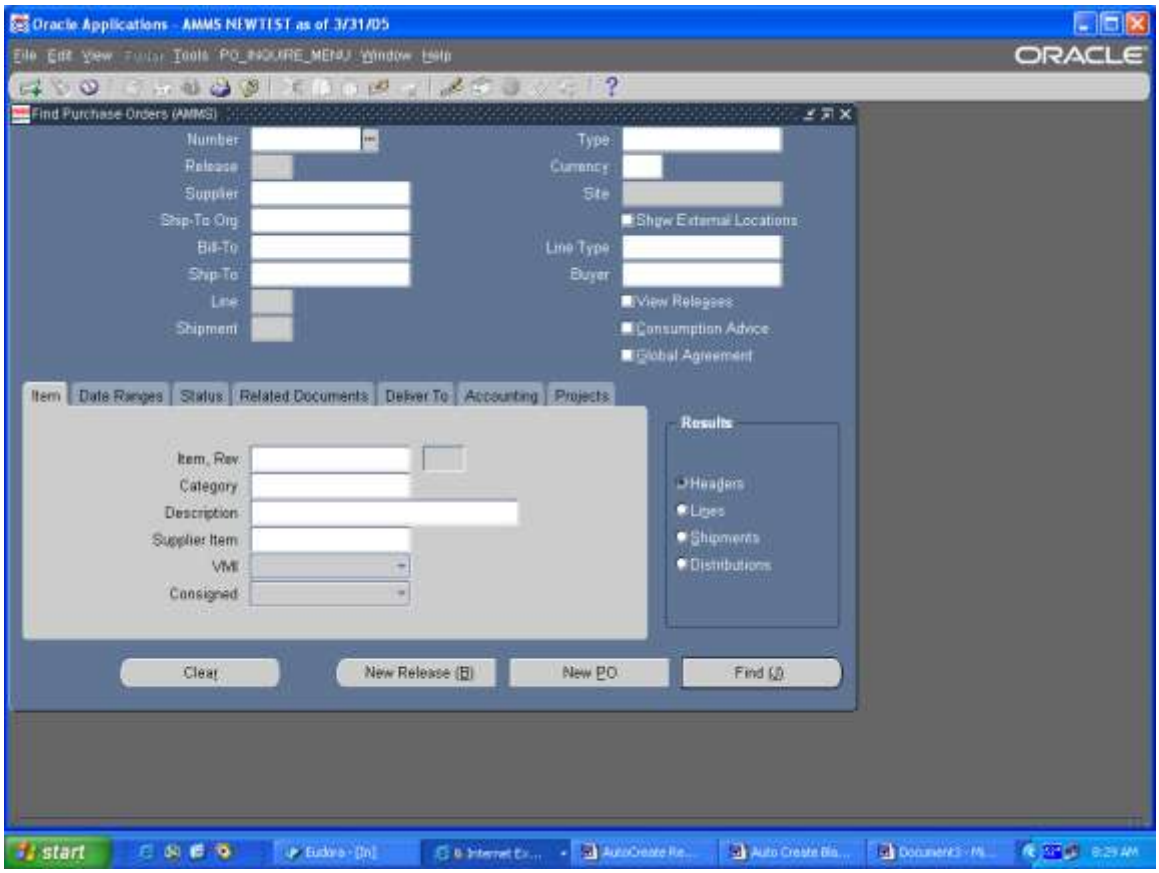
Step Description: Sign onto Oracle and select Purchasing AMMS responsibility

Expected Results: Purchasing AMMS main menu will appear



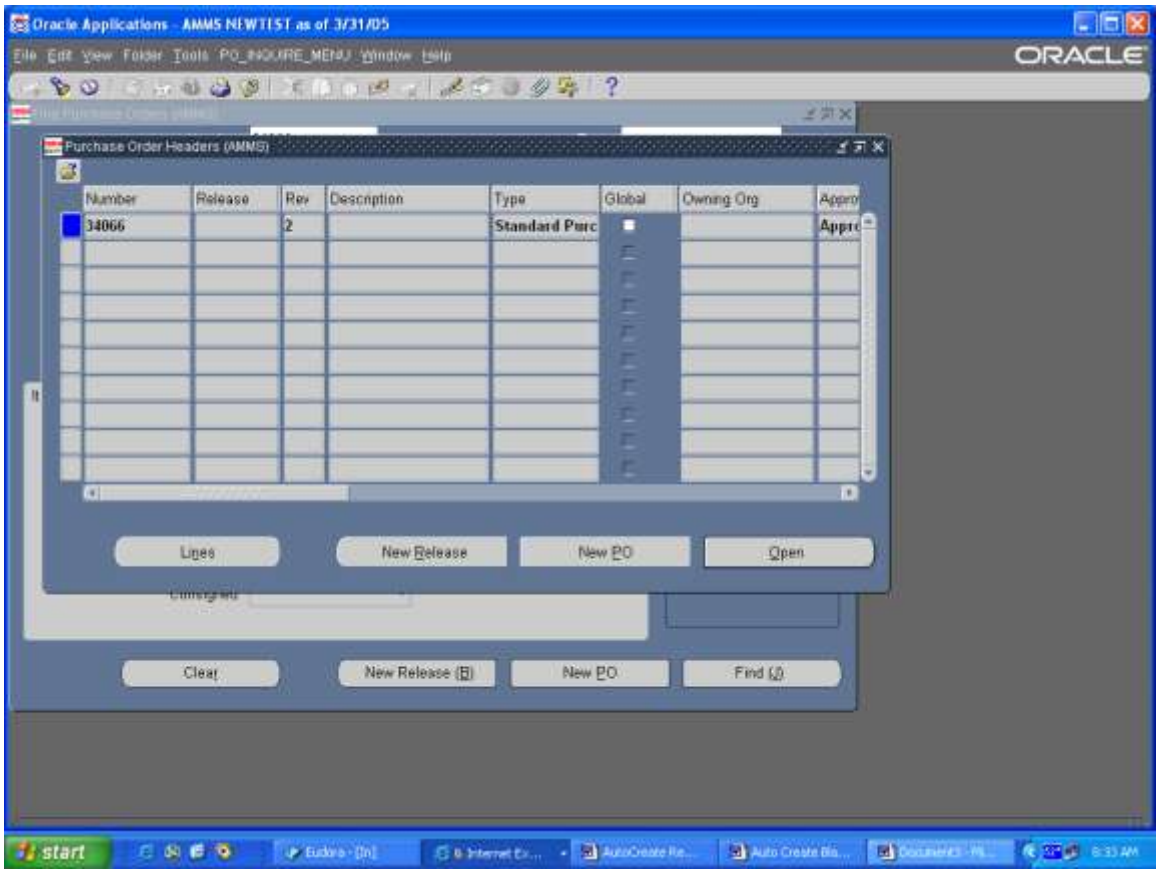
Step Description: From the Purchasing AMMS main menu select Purchase Order > Purchase Order Summary click Open

Expected Results: The Find Purchase Order window will appear



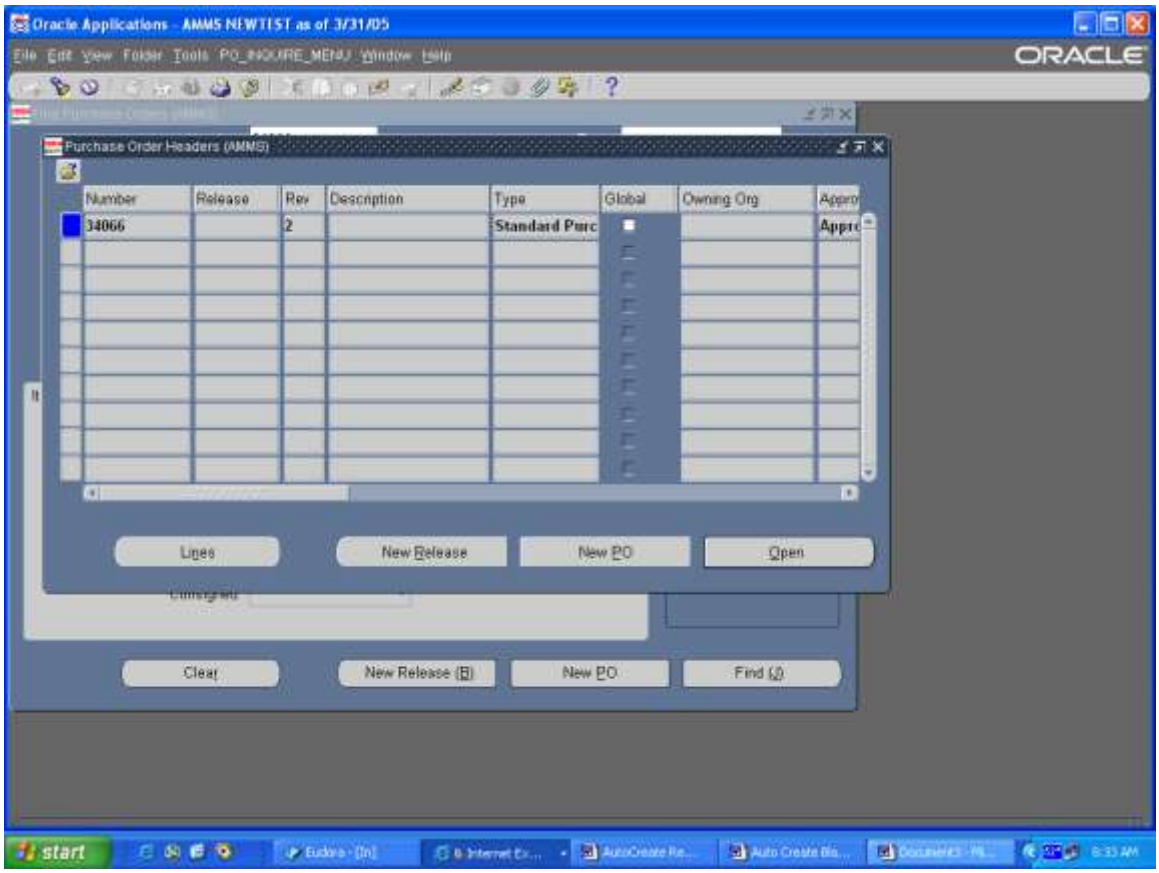
Step Description: Enter the PO number you want to create the attachment for, click on the Find button

Expected Results: Purchase Orders Header window will appear



Step Description: Click on the Open Button to Open the Purchase Order

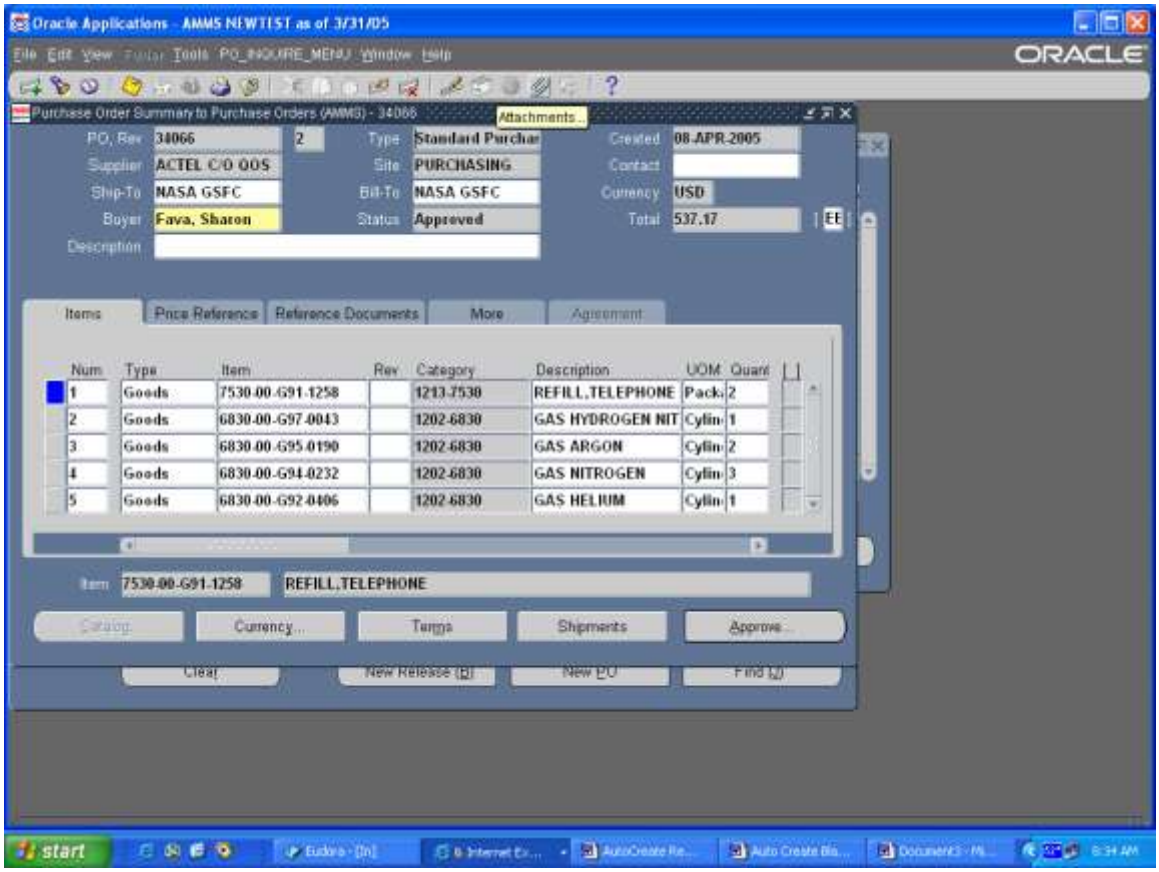
Expected Results: Purchase Order Summary to Purchase Order window will appear



NOTE: TO PUT ATTACHMENT AT THE HEADER LEVEL CLICK IN A FIELD AT THE TOP OF THE FORM. TO PUT AN ATTACHMENT AT THE LINE LEVEL CLICK ON A LINE ON THE PURCHASE ORDER.

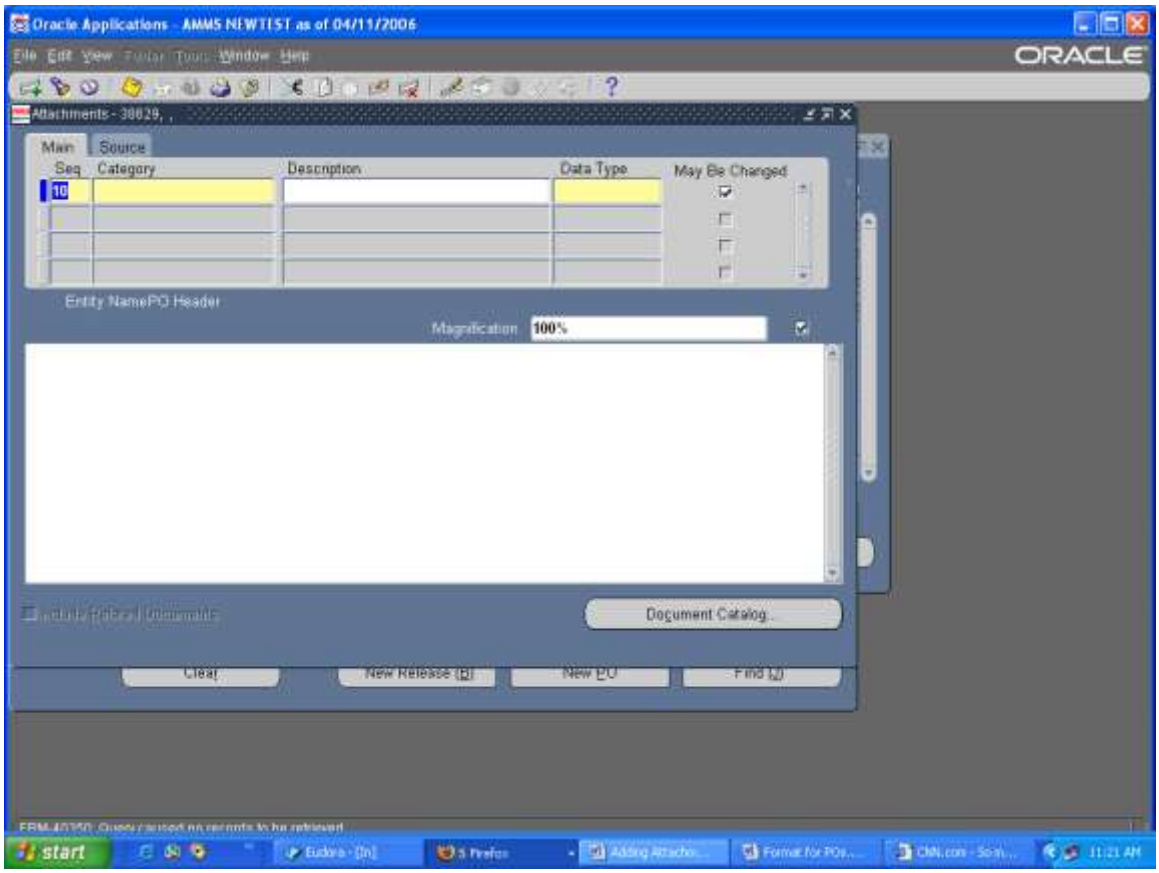
Step Description: From the Tool Bar select the icon that looks like a Paper clip

Expected Results: Attachments window will appear



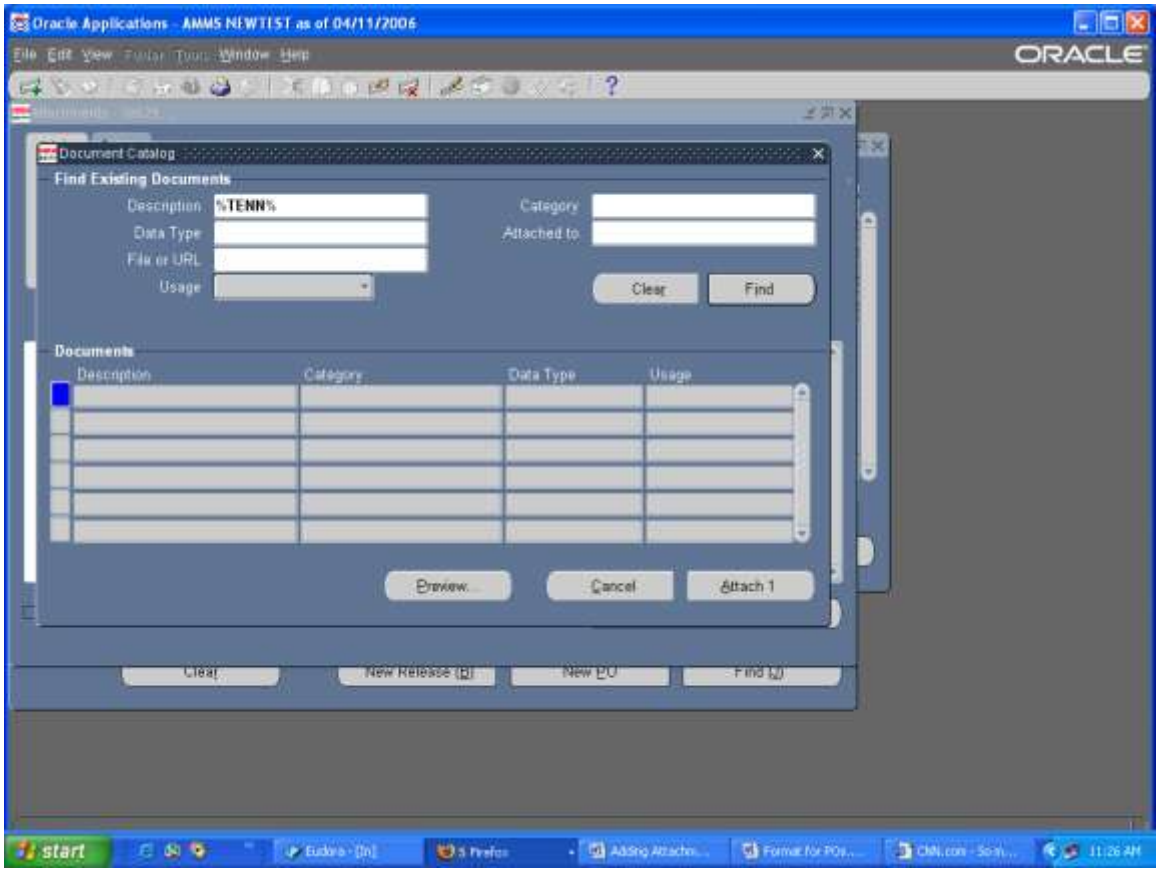
Step Description: If you are using an Attachment format click on the Document Catalog button at the bottom right of the window

Expected Results: Document Catalog window will appear



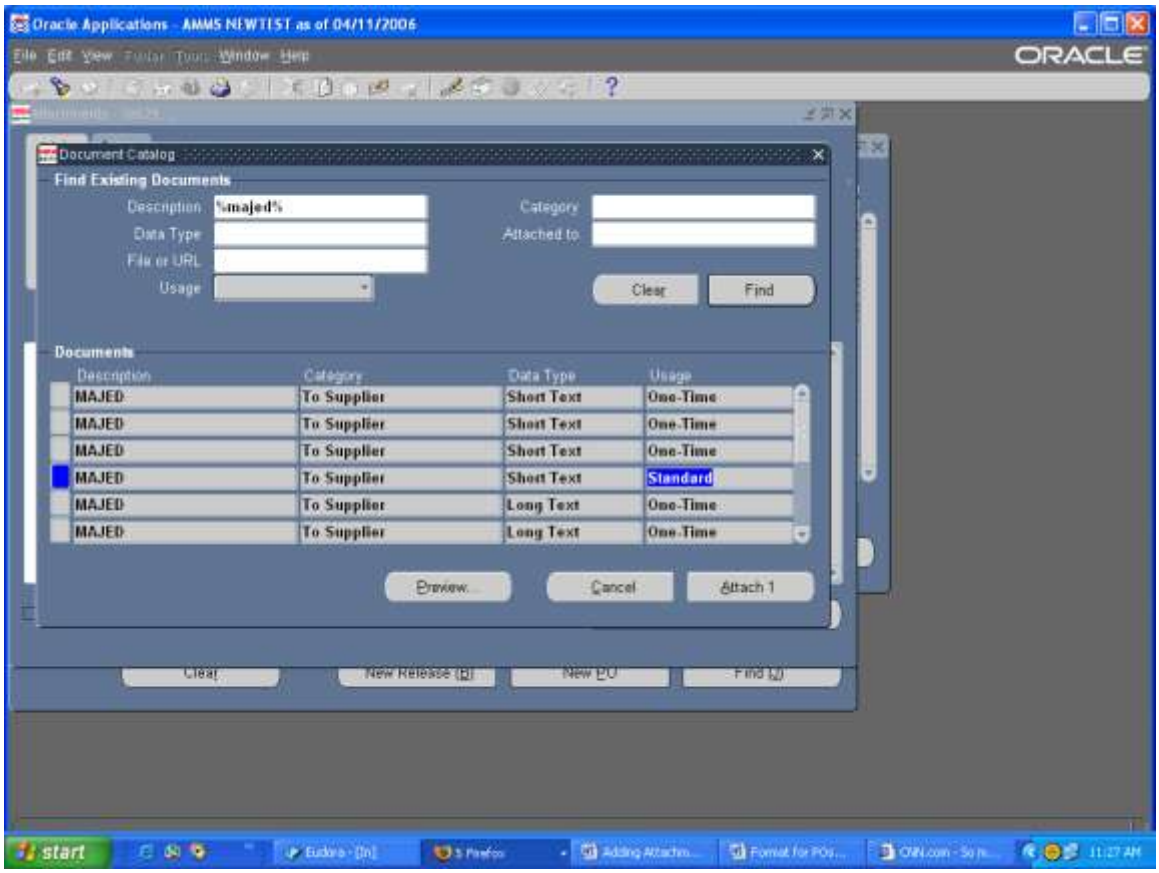
Step Description: At the Document Catalog window, in the Description field enter part of the attachment name, example %TENN%, click on the Find button

Expected Results: Attachment will appear at bottom of window



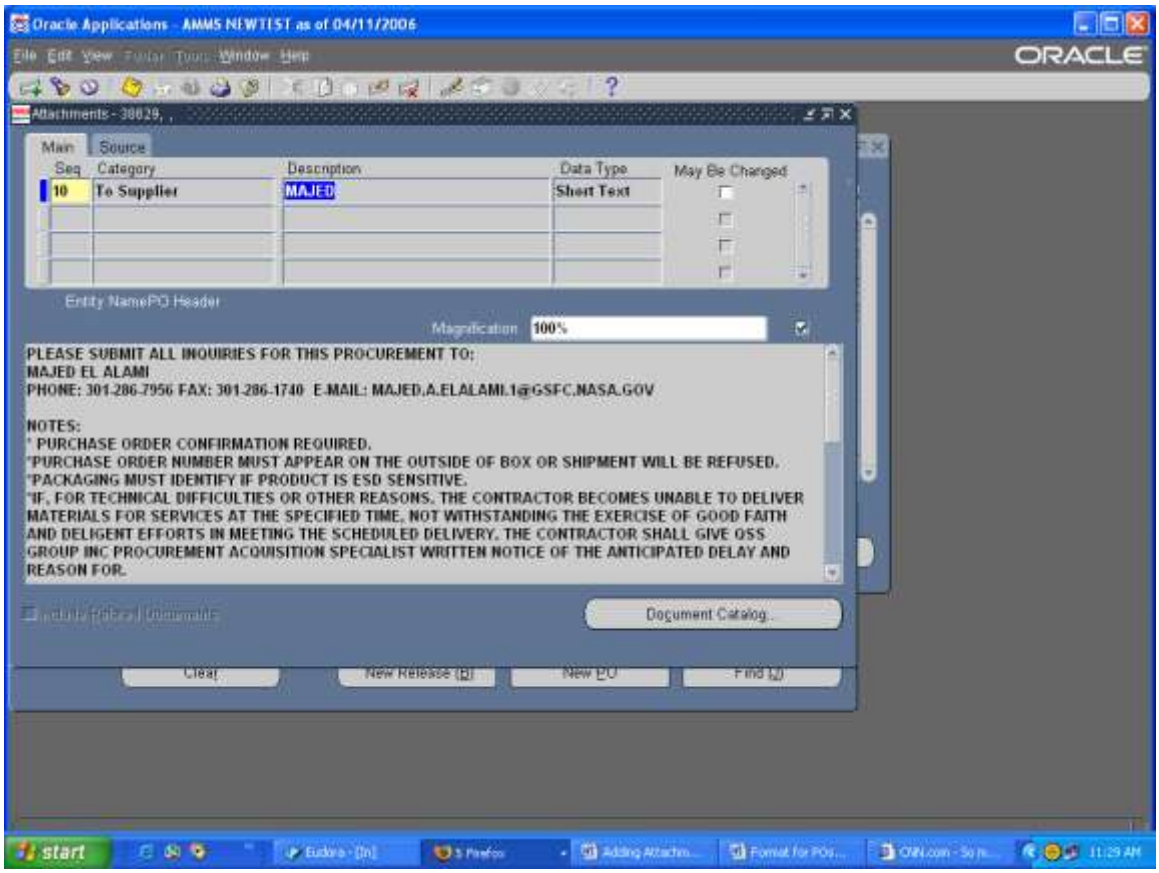
Step Description: Select the attachment, by clicking in the field, then click on the Attach 1 button

Expected Results: Attachment will be added to PO



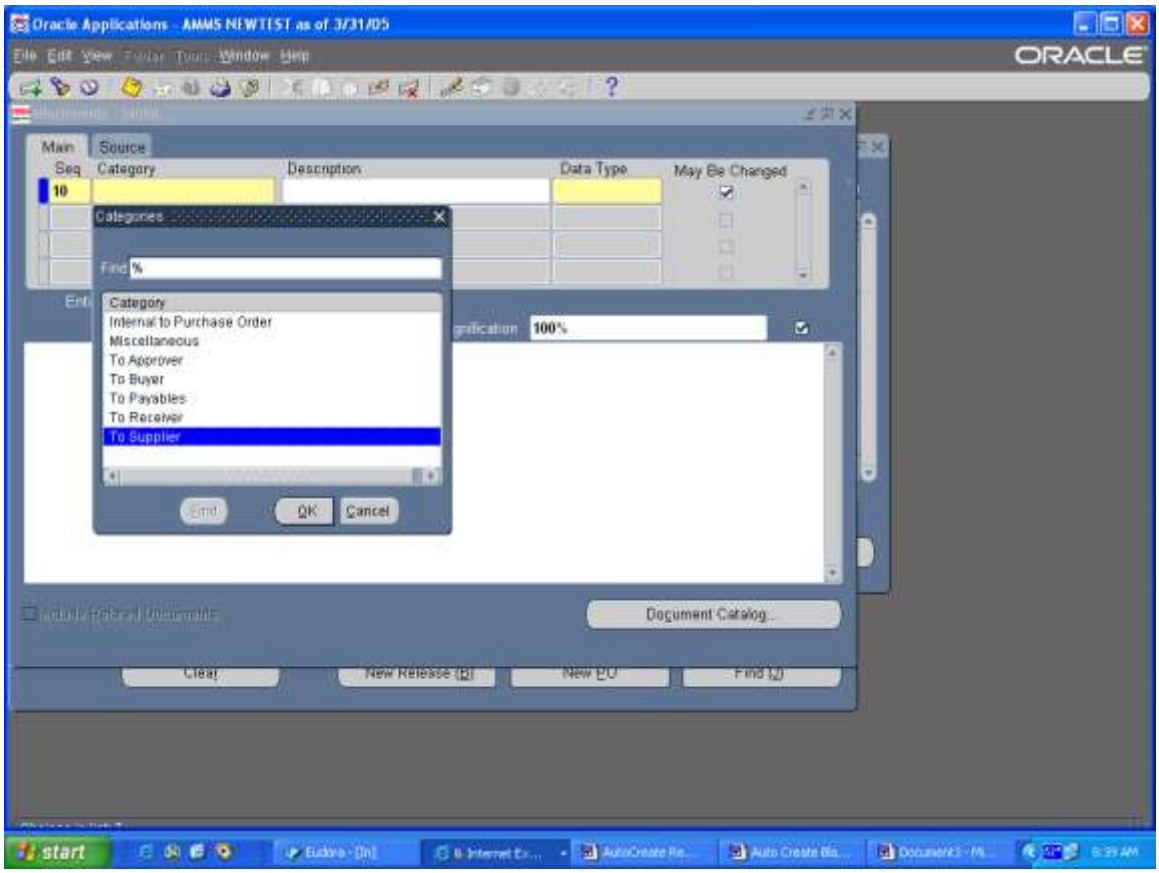
Step Description: To add multiple attachments to a PO click in the next line in the Attachment window

Expected Results: Field will be ready to populate



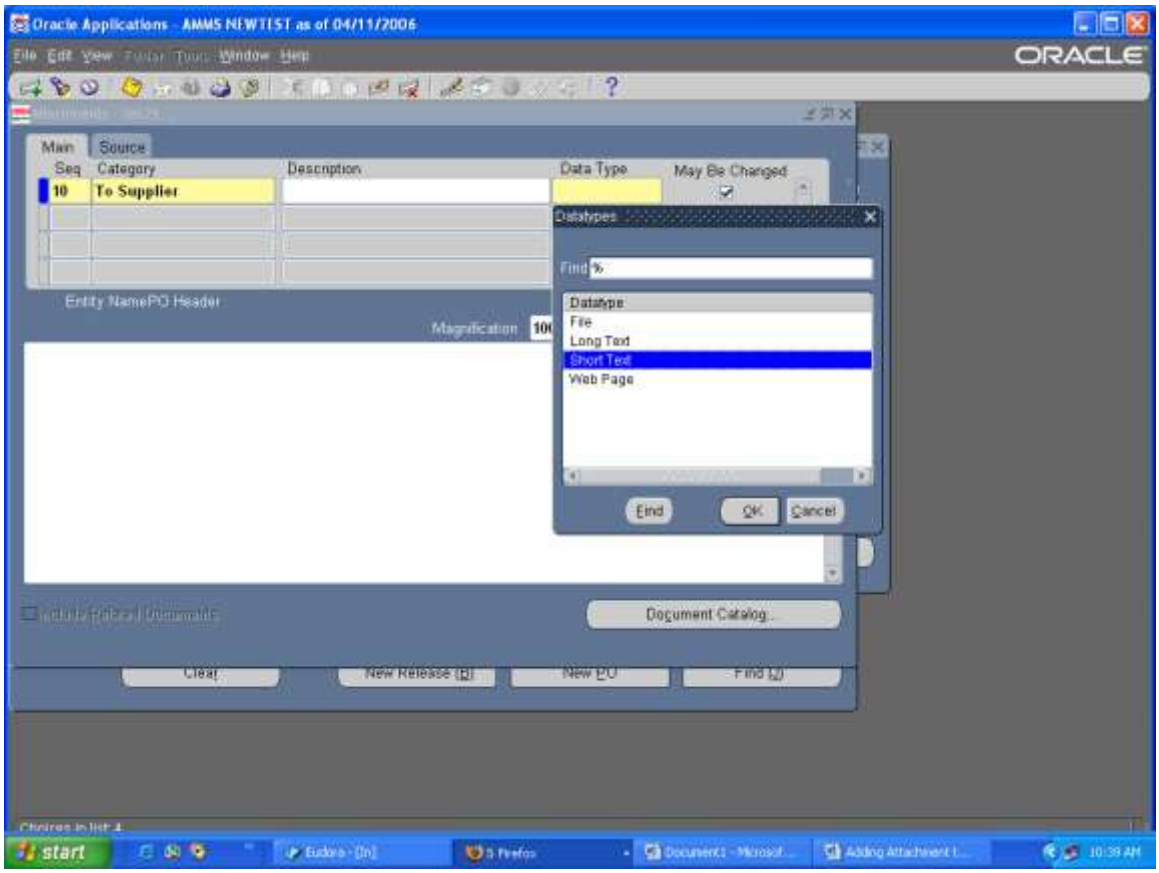
Step Description: If you are typing an attachment, click on the Category field click on the LOV and in the Find window enter a % sign and a list of choices will appear, select the appropriate category. To Supplier is the one to be used.

Expected Results: Field will be populated



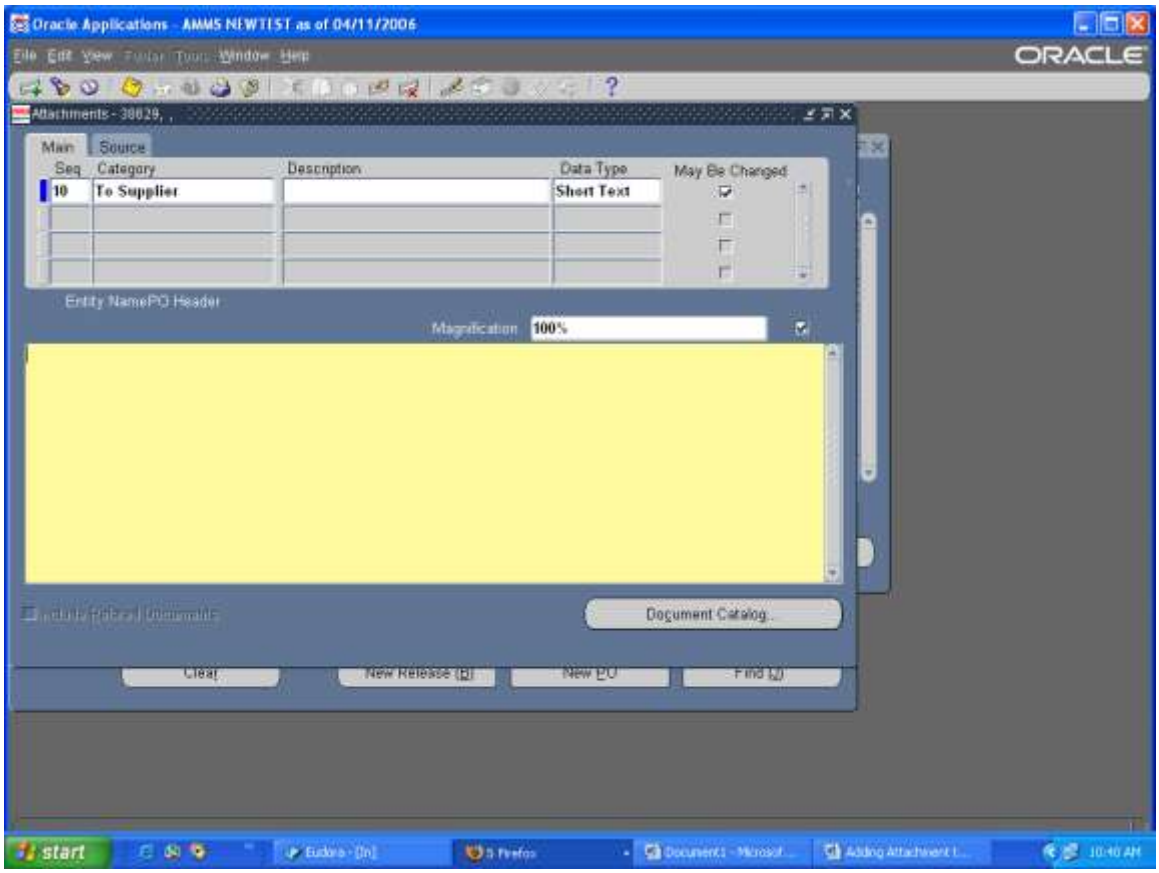
Step Description: In the Data Type field click on the LOV and select Short Text, this will allow you to type more information

Expected Results: Field will be populated



Step Description: Notice the bottom field is yellow start typing you required information

Expected Results: Field will be populated



Step Description: Follow this format for putting attachments on purchase orders. Please note: changes to purchase orders are not to be put in attachments, they are to be put in the Note to Supplier field:

1. Change information to supplier, if applicable – address in the **Notes to Supplier** use this field for changes to PO only.

   Change 2, April 10, 2006 (list the change number to the supplier along with the date, do not abbreviate)

   Added Line 12, PN 788978
   Deleted Line 3, PN 245895
   Added Line 16, Pre-cap Inspection, PN 78985
   Increased Quantity on Line 4, PN 898574, from 10 each to 15 each.
   Decreased Quantity on Line 6, PN4568, from 12 each to 9 each

2. **Buyer Contact Information**

3. **Notes**

4. **Verification of Services**

7. **Quote Reference Information**

8. **Quality Assurance and Shipping information (ie:see below)**

   Single Date Lot Code Required

   Manufacturer's C of C Required

   Special Packaging Requirements

   Chemical and Physical Analysis Required

   Multiple date codes acceptable (if non flight and customer has indicated such)

   Pre-cap Inspection information (ie: Pre-Cap Source Inspection appplicable to Line 3 also any Technical POC give, name, and

telephone number along with verification information, if applicable)

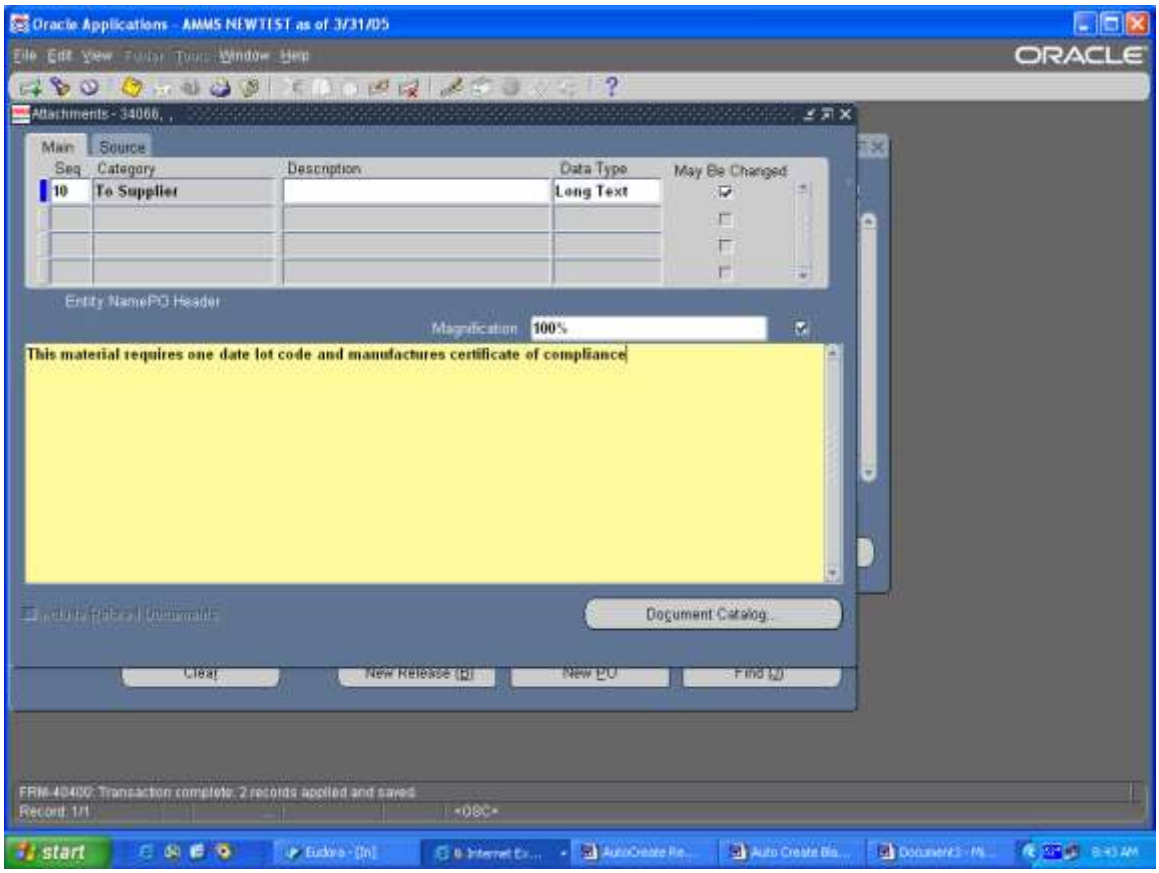
Other testing/data requirements information. (ie: Lot Charge and Screening and Group A Test Data applicable to Line 4)

7. **Physical, Chemical & Proof Test Required (IF Applicable).**

Attachments are to be put on the Purchase Orders in this order. Again any changes to purchase order there is NOT to be an Attachment, use the Note to Supplier field, see the Project Parts Change Established Purchase Order script.

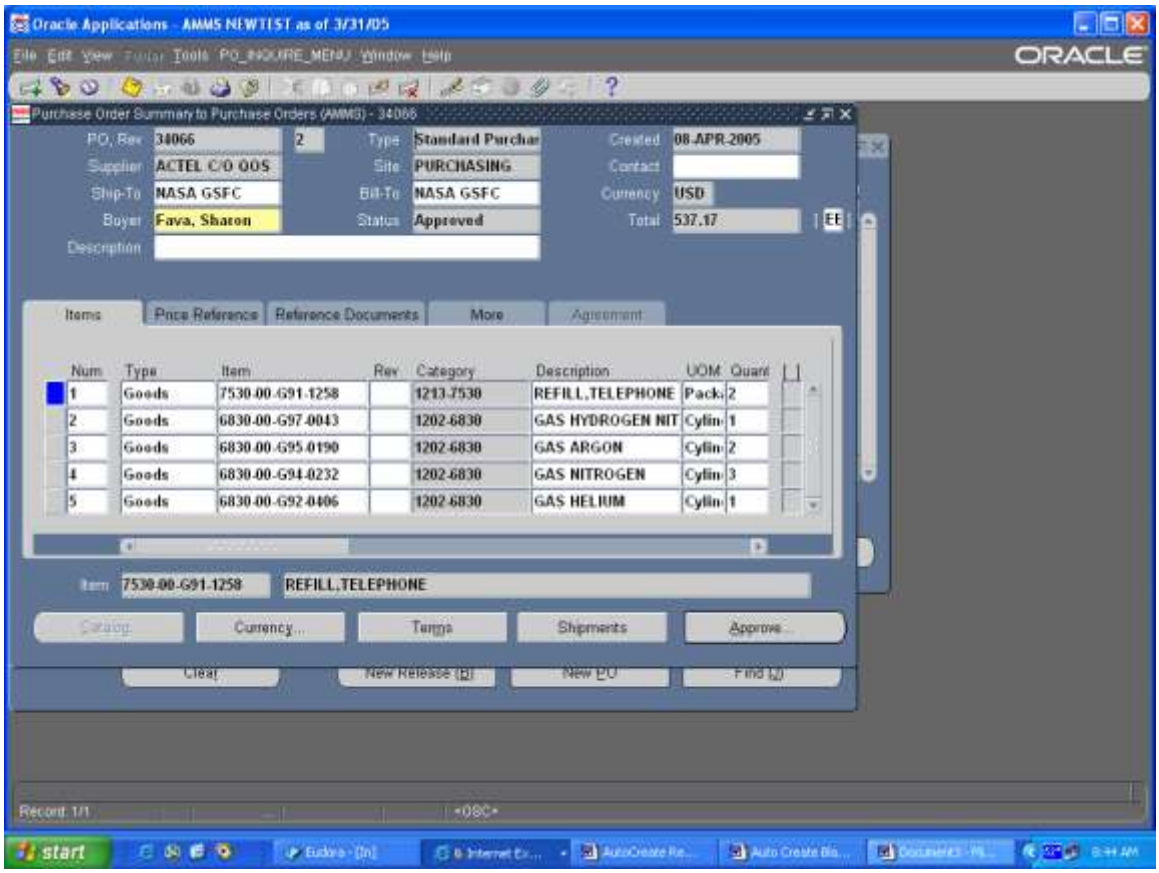
Step Description: Once you have entered all required information click on the Save button

Expected Results: Transaction Saved and Applied message



Step Description: Close the Attachment window.

Expected Results: Attached added to PO, will return to Purchase Order to Purchase Order Summary window.



Step Description: Close all forms Transaction Complete.

NOTE: If you want to put an Attached on the PO Header click in one of the fields at the top of the Purchase Order Summary to Purchase Order window. If you want to put an Attachment at the line level for a specific item, click on the specific item, and then create the attachment.

AMMS TRAINING SCRIPT

Project Parts Changes to Established Purchase Order

Purpose

The purpose of this training script is to show the buyers how to make changes to established purchase orders.

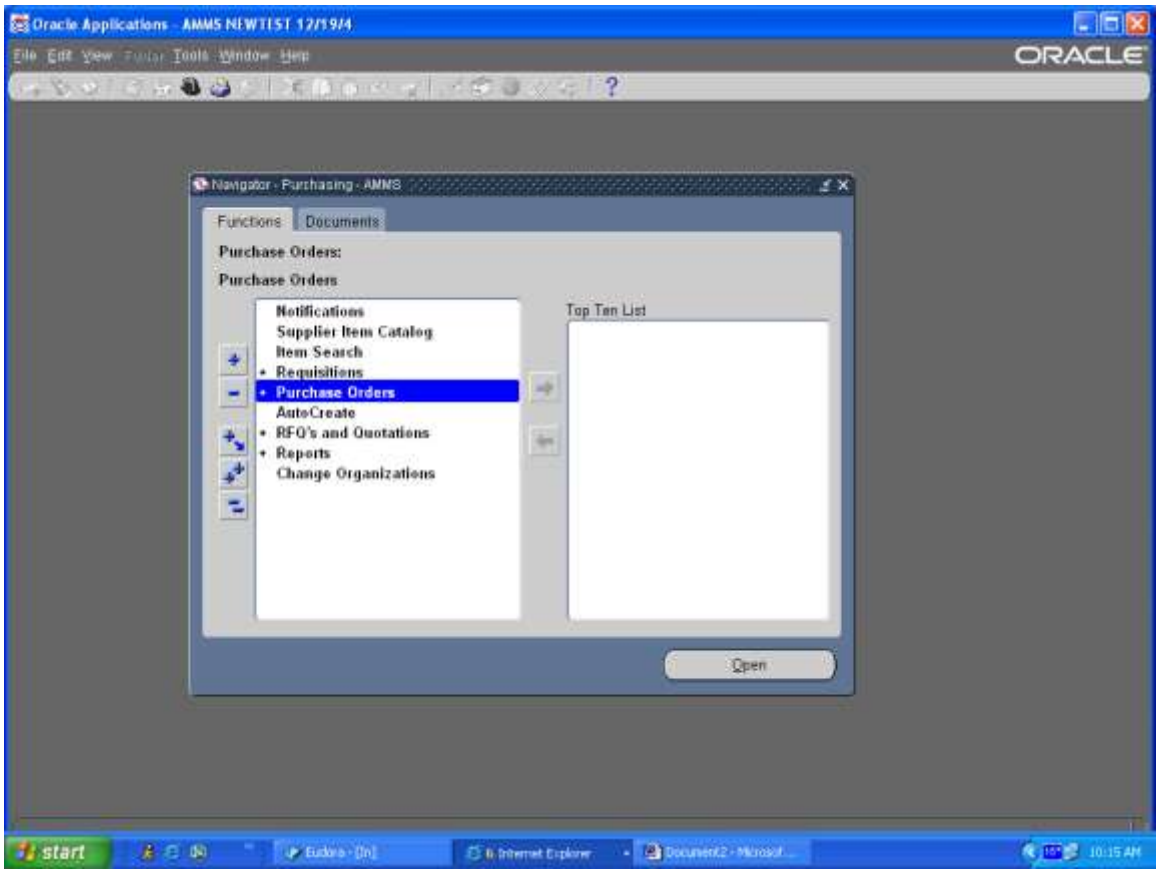
Audience

Buyers

Prepared By	Theresa Coulson
Creation Date:	05/12/2006
Document Name	Project Parts Changes to Established Purchase Orders.doc
Version	2
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Purchasing.	

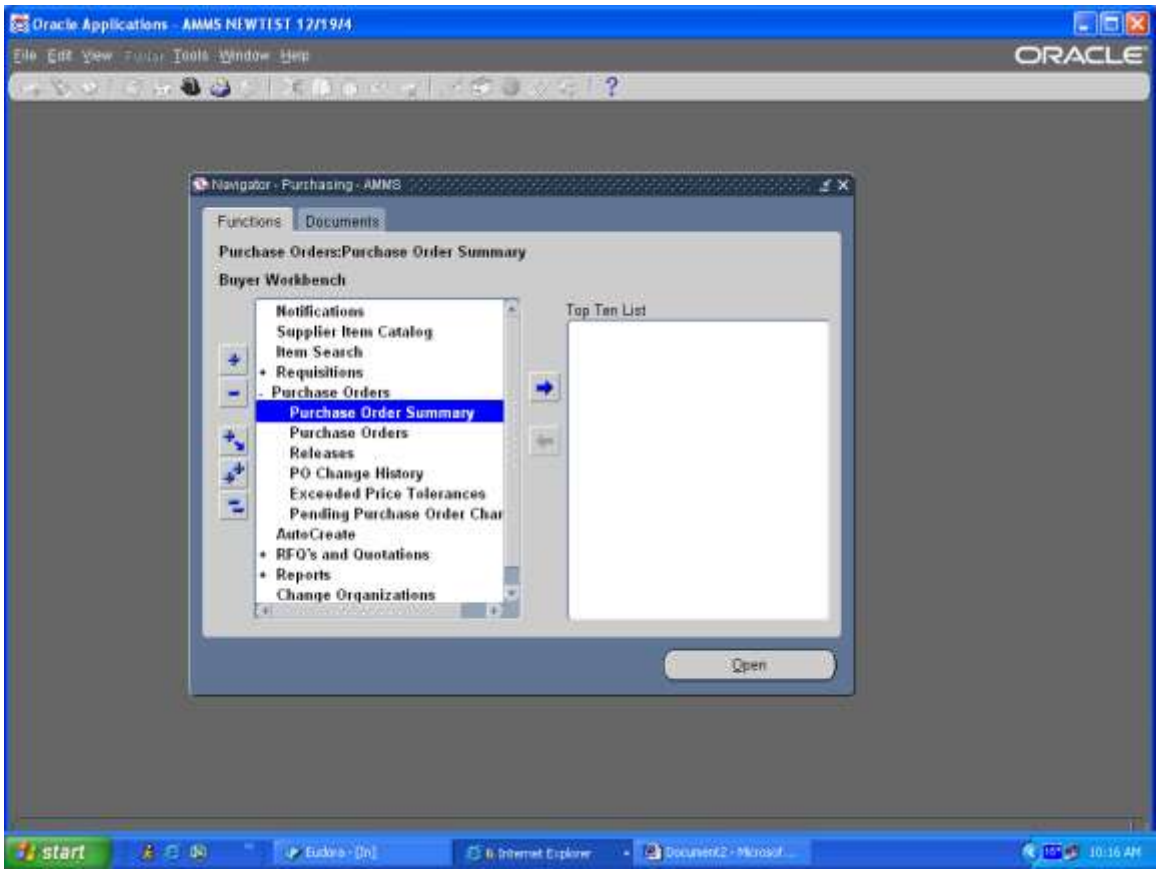
Step Description: Sign onto Oracle and select the Purchasing AMMS responsibility

Expected Results: The Purchasing AMMS main menu will appear



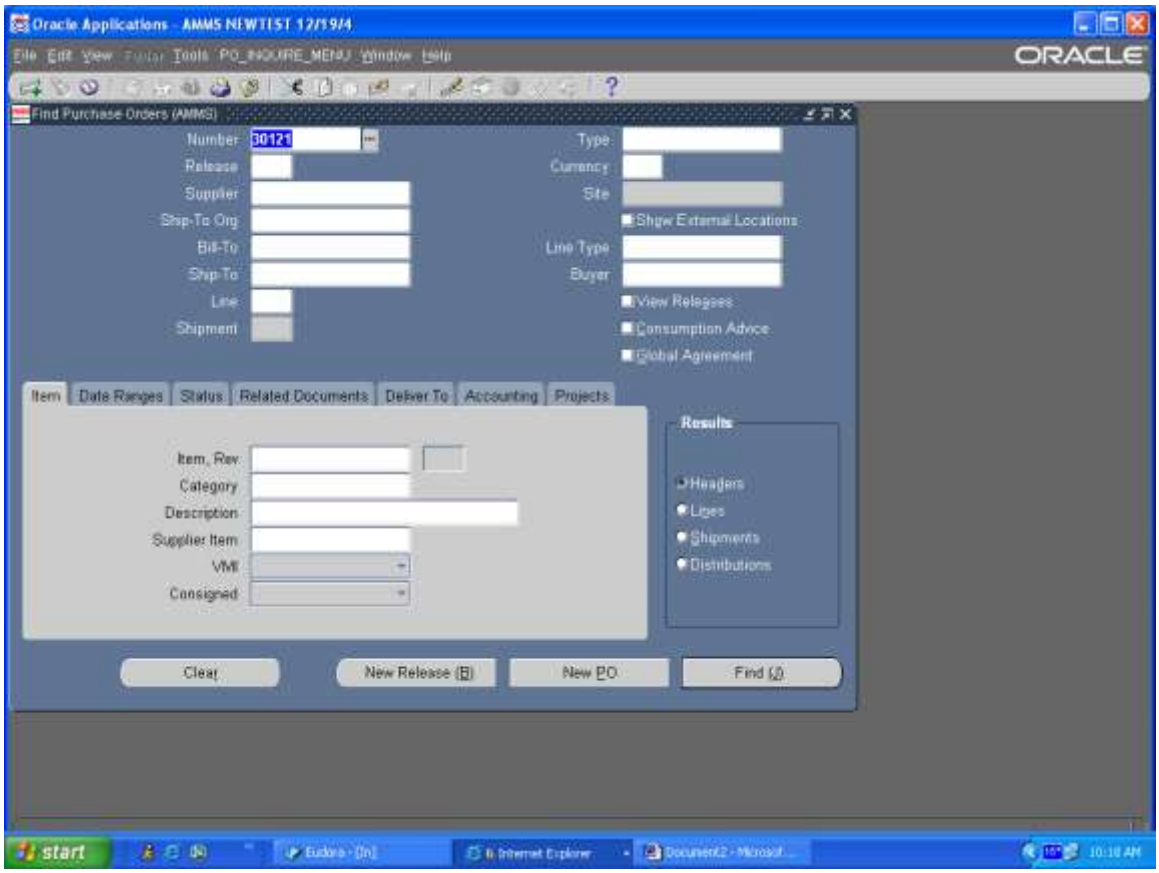
Step Description: From the Purchasing AMMS main menu select Purchase Orders > Purchase Order Summary, click on the Open button

Expected Results: The Find Purchase Order screen will appear



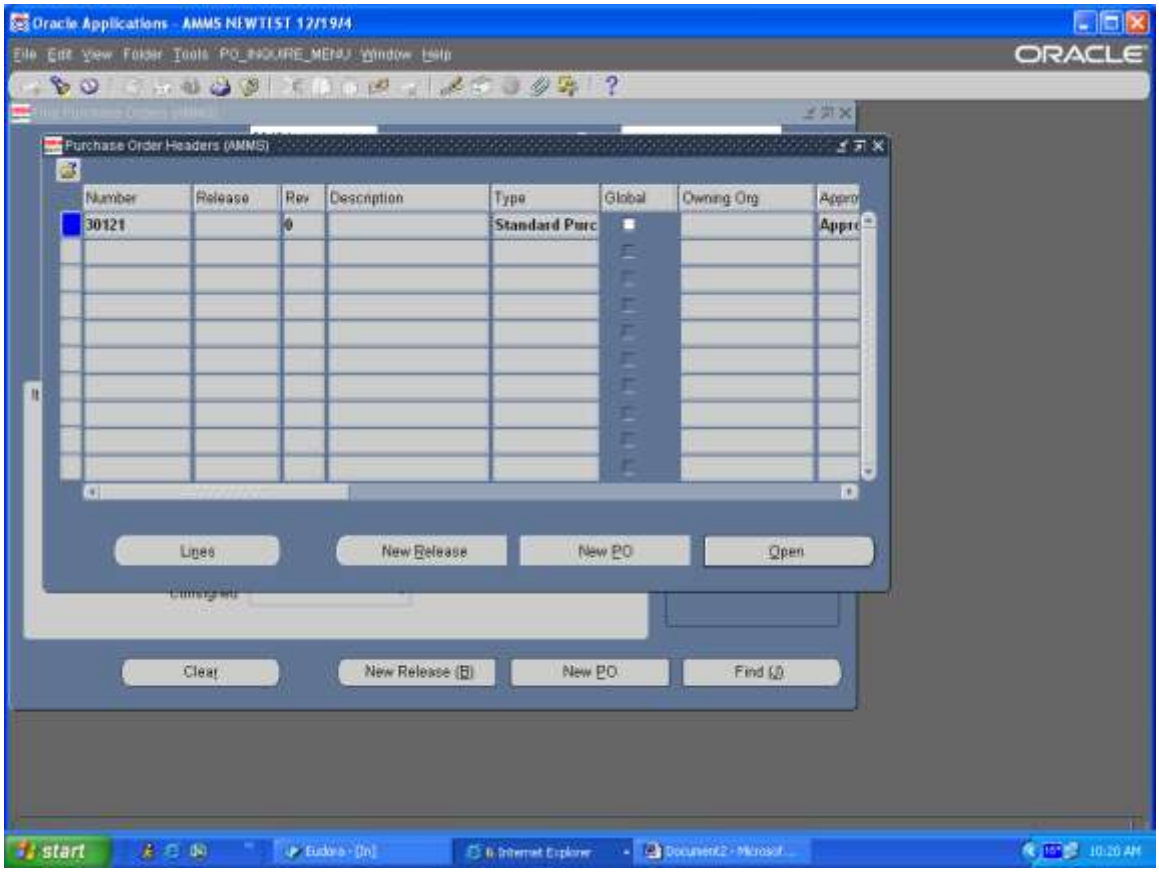
Step Description: In the Number field enter the purchase order number you want to view. Click on the Find button

Expected Results: The Purchase Order Header window will appear



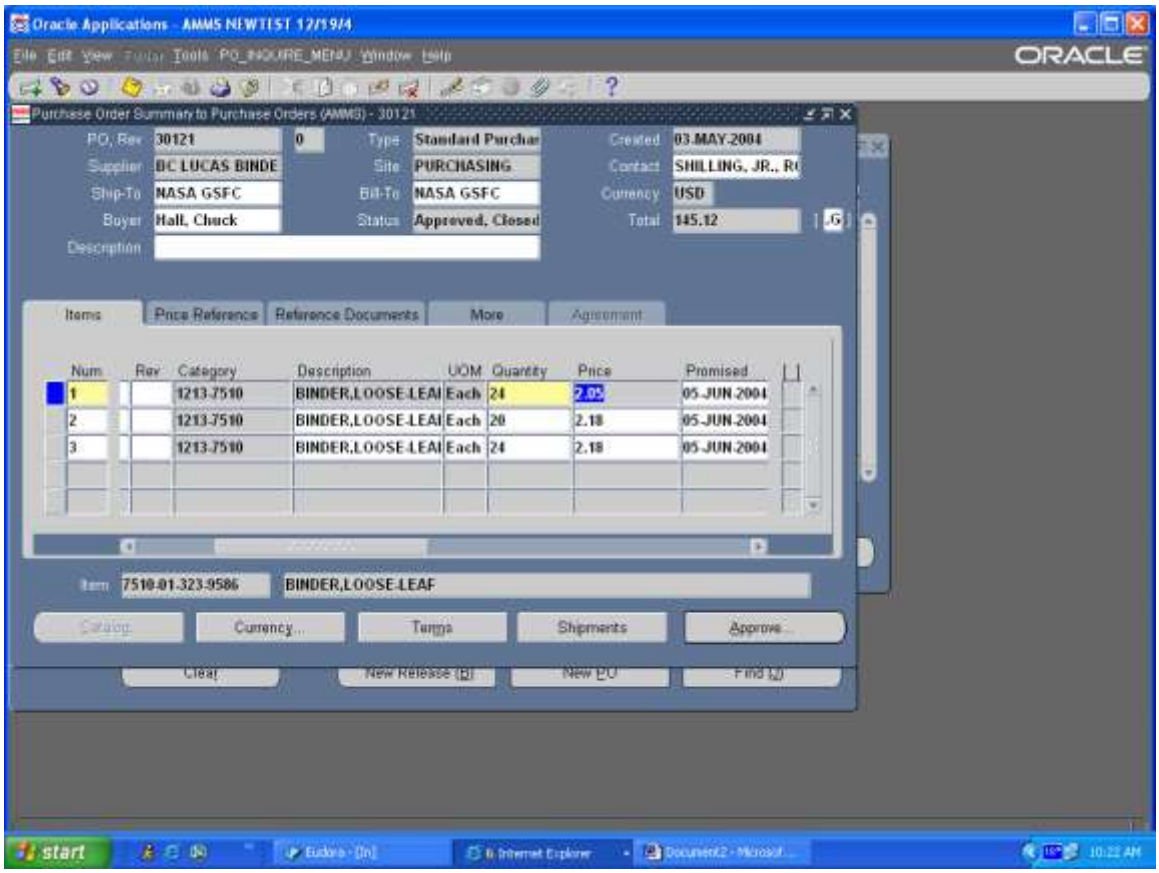
Step Description: To make changes to an item on the purchase order click on the Open button.

Expected Results: The Purchase Order Summary to Purchase Order screen will appear



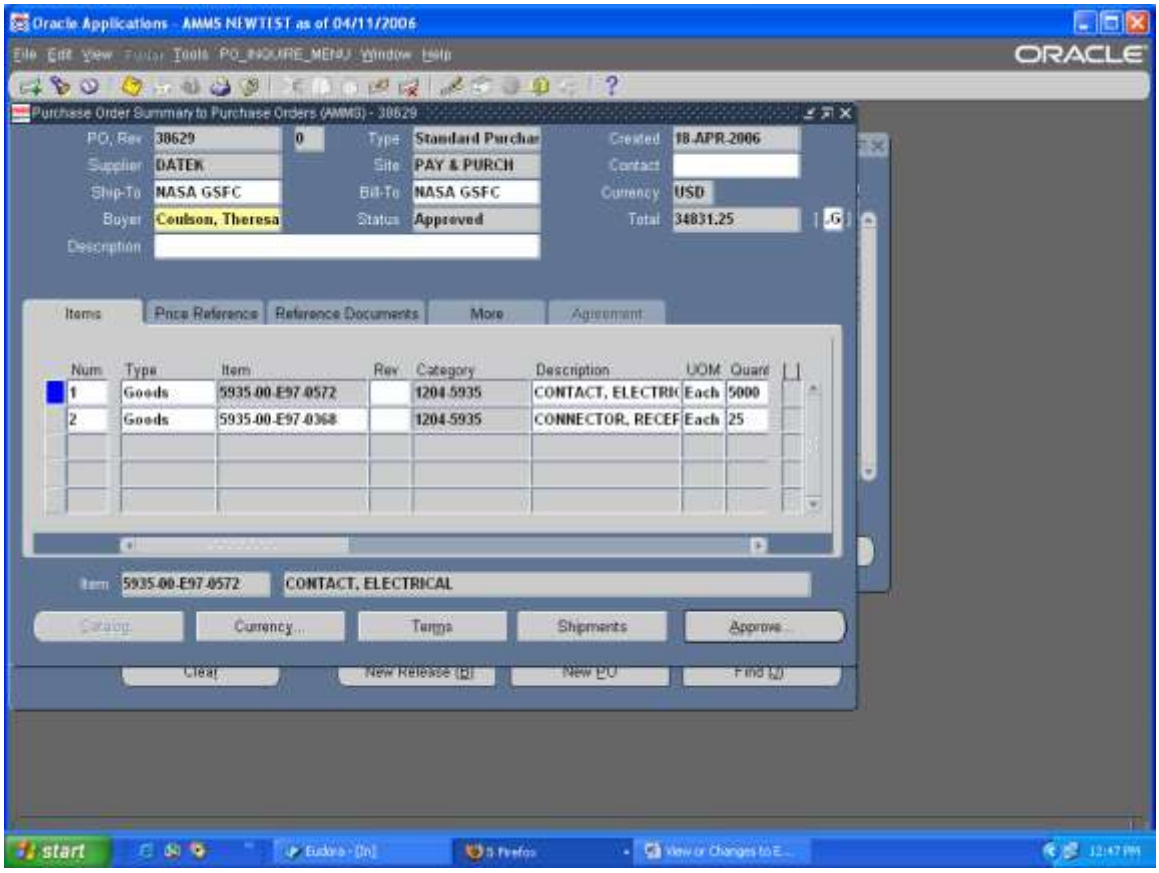
Step Description: Update the any necessary information if you need to change the cost, click on the price field and update the cost. If you need to change any other information select the field and make the appropriate changed.

Expected Results: Information will change



Step Description: After you have made the changes to the purchase order, you MUST put the changes in the Note to Supplier field. Click on the Terms button at the bottom of the screen.

Expected Results: Terms and Conditions window will appear



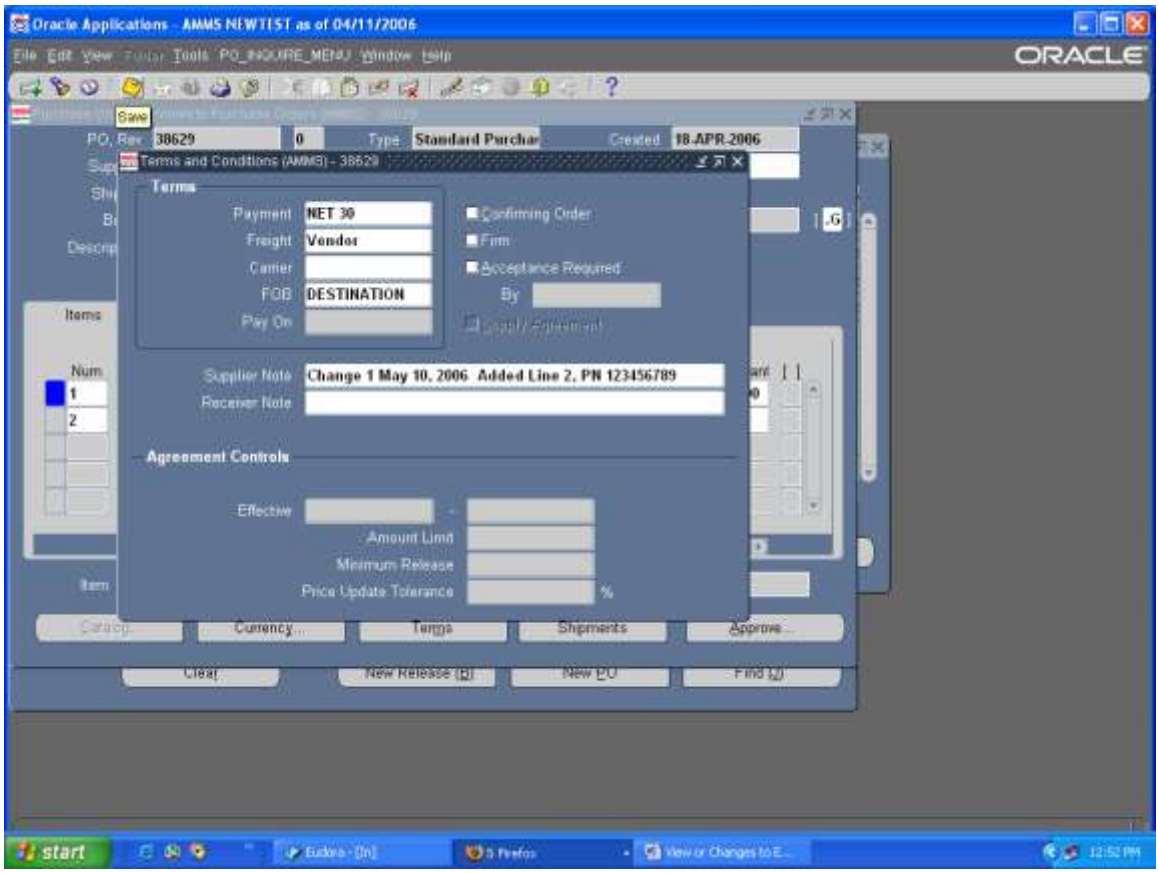
Step Description: In the Note to Supplier field enter what was changed in this format:

<u>Use the Note to Supplier field for changes to PO only</u>.

Example: Change 2, April 10, 2006 (list the change number to the supplier along with the date, do not abbreviate)

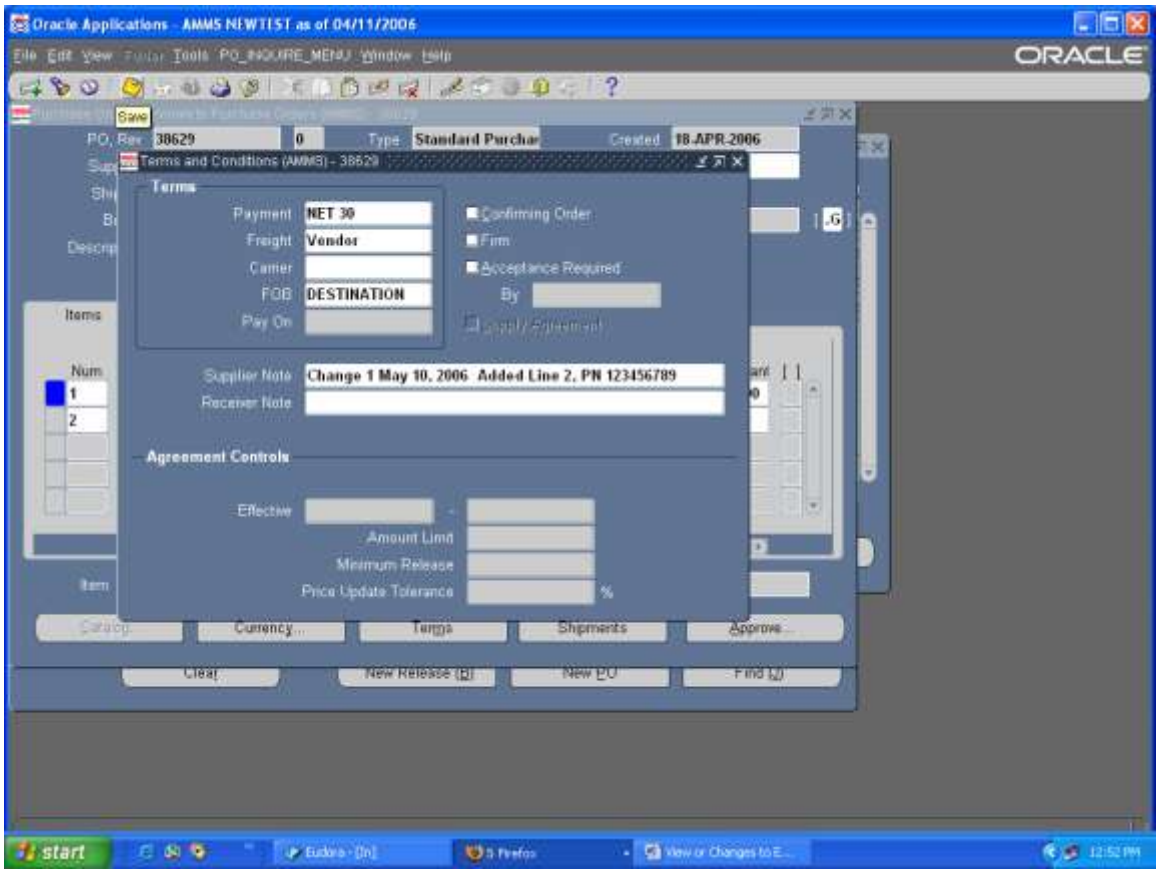
Added Line 12, PN 788978
Deleted Line 3, PN 245895
Added Line 16, Pre-cap Inspection, PN 78985
Increased Quantity on Line 4, PN 898574, from 10 each to 15 each.
Decreased Quantity on Line 6, PN4568, from 12 each to 9 each

Expected Results: Field will be populated



Step Description: Click on the Save button

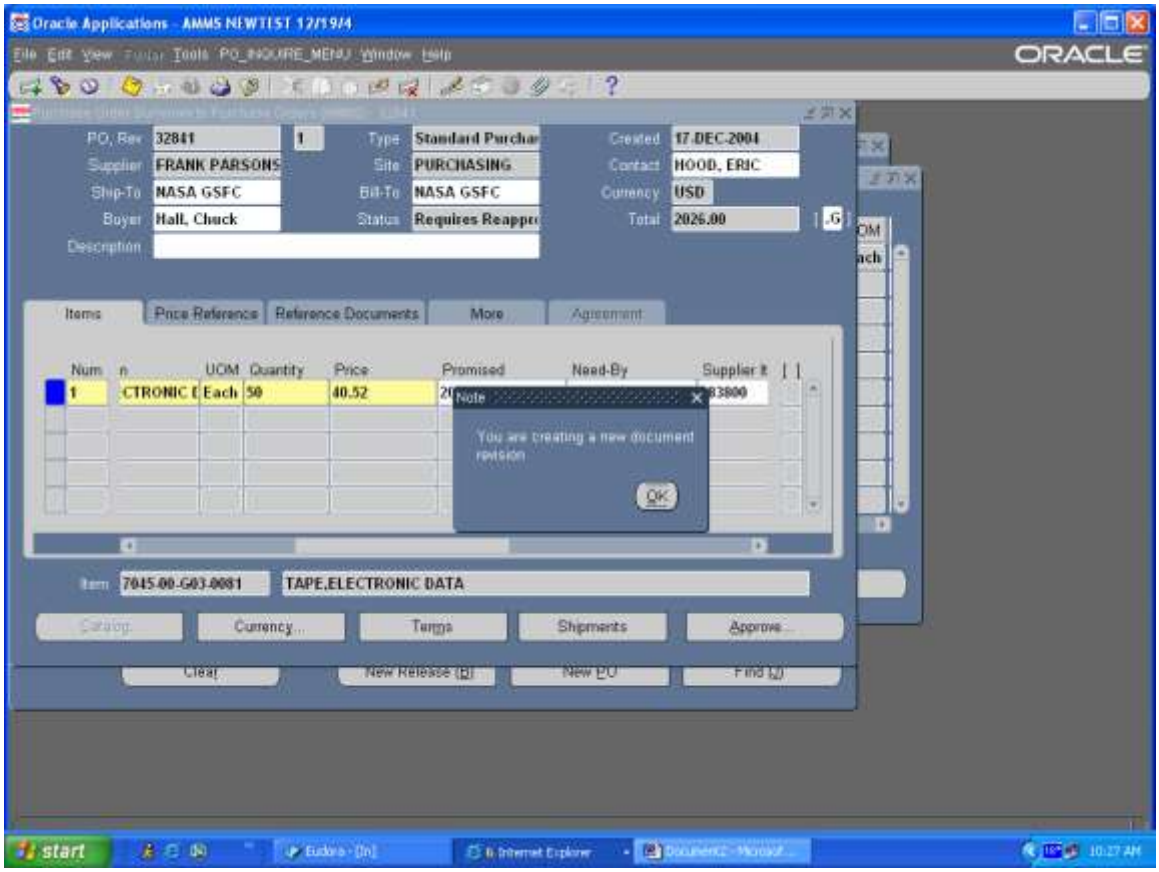
Expected Results: Note Creating new document revision



NOTE: YOU MUST PUT INFORMATION IN THE NOTE TO SUPPLIER FIELD FOR EVERY CHANGE THAT IS MADE TO A PO. IF INFORMATION ALREADY EXISTS IN THE FIELD, GO TO THE END OF THAT STATEMENT AND START A NEW STATEMENT.

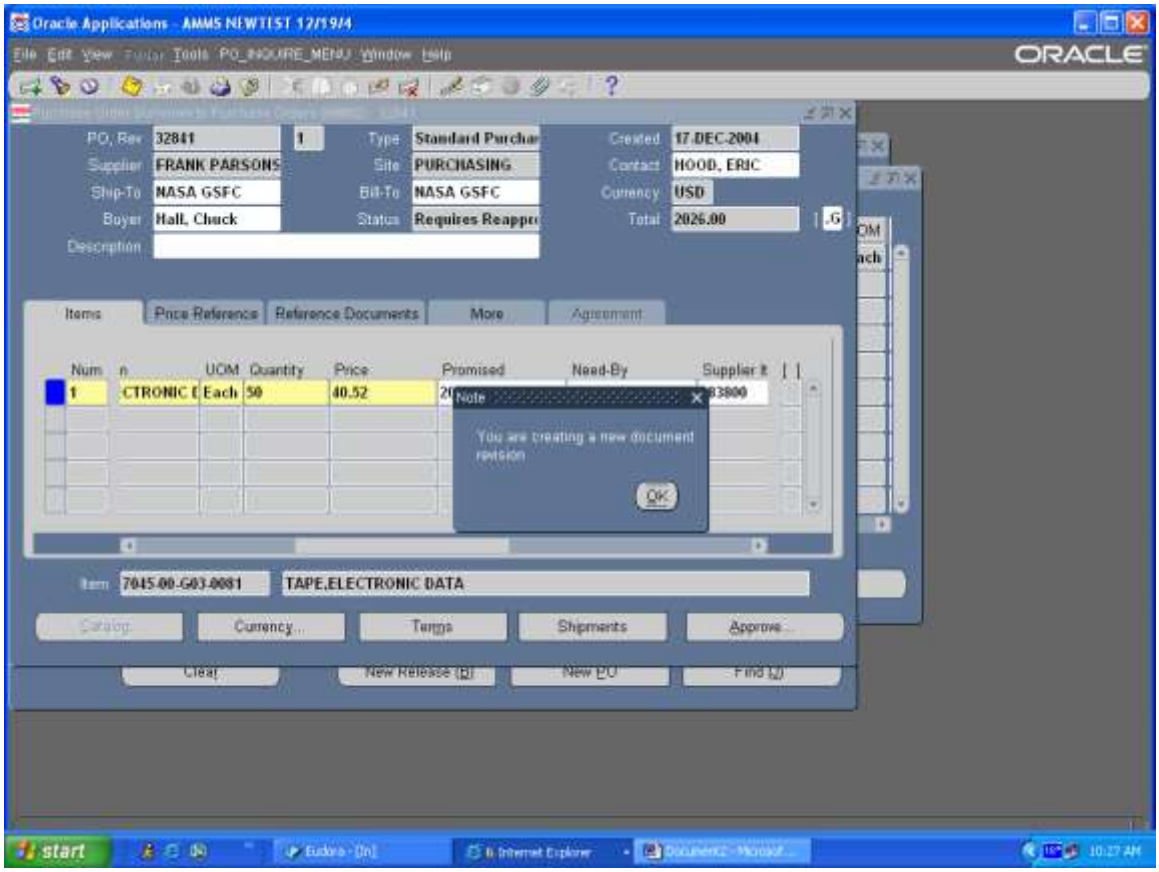
Step Description: Once you have made desired changes, Save your work.

Expected Results: A note window will appear



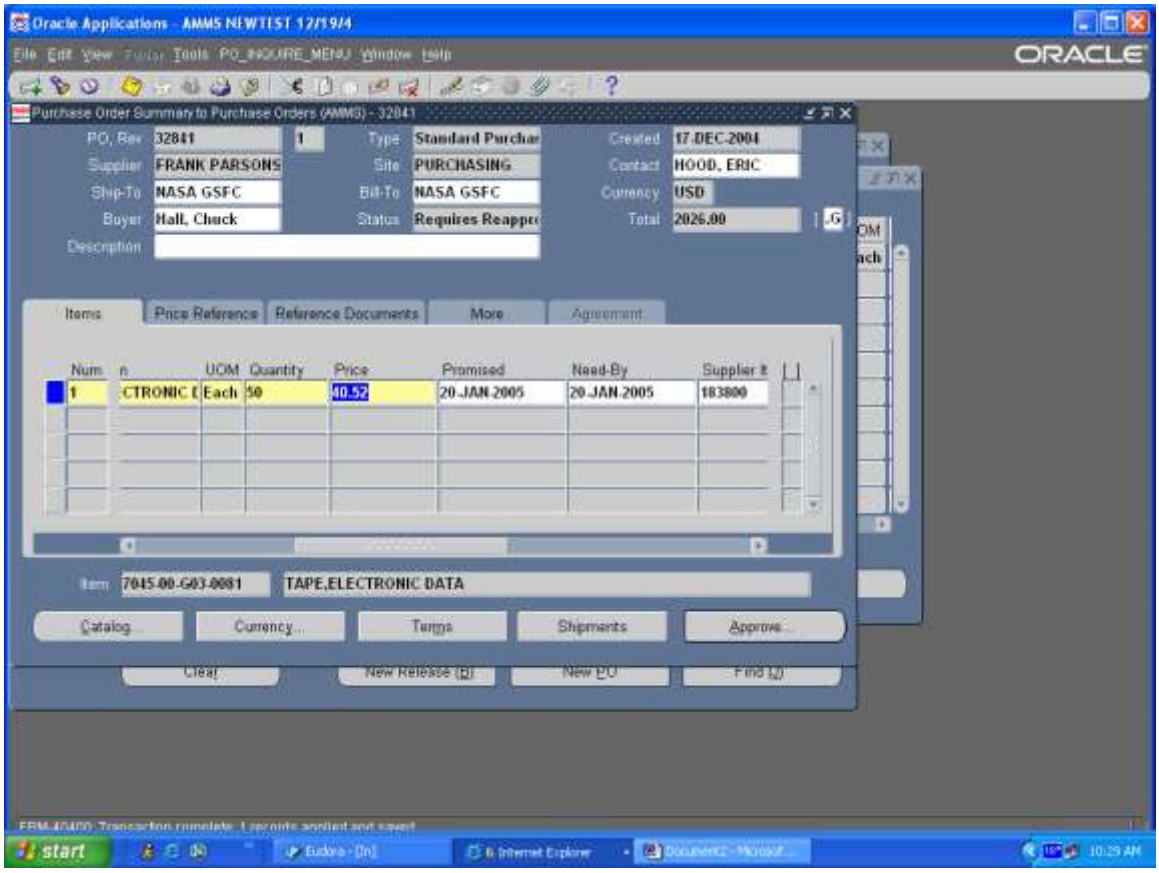
Step Description: Click Ok to the Note

Expected Results: Window will go away



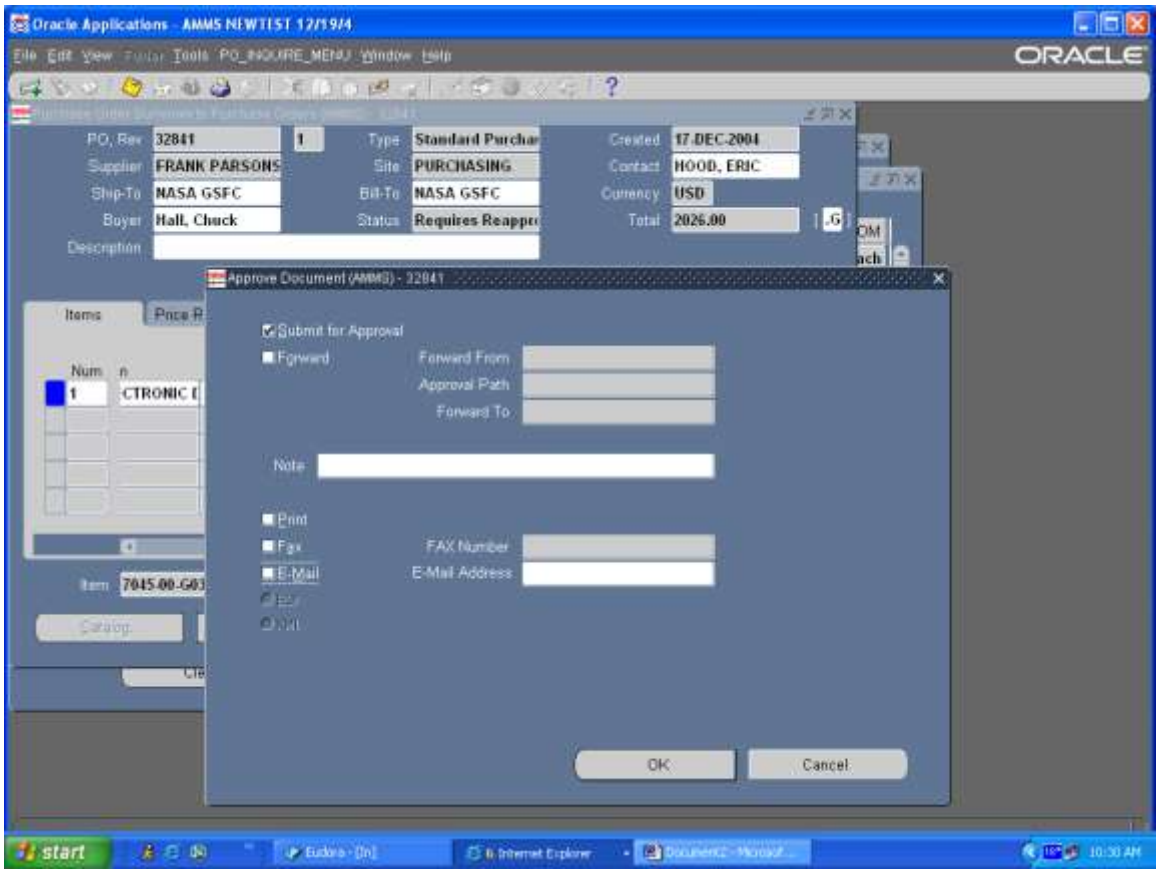
Step Description: Take note that Status on the PO is Requires Re-Approval, any changes made to a purchase order the purchase order will have to be re-approved. Click on the Approve button.

Expected Results: Approval Documents window will appear



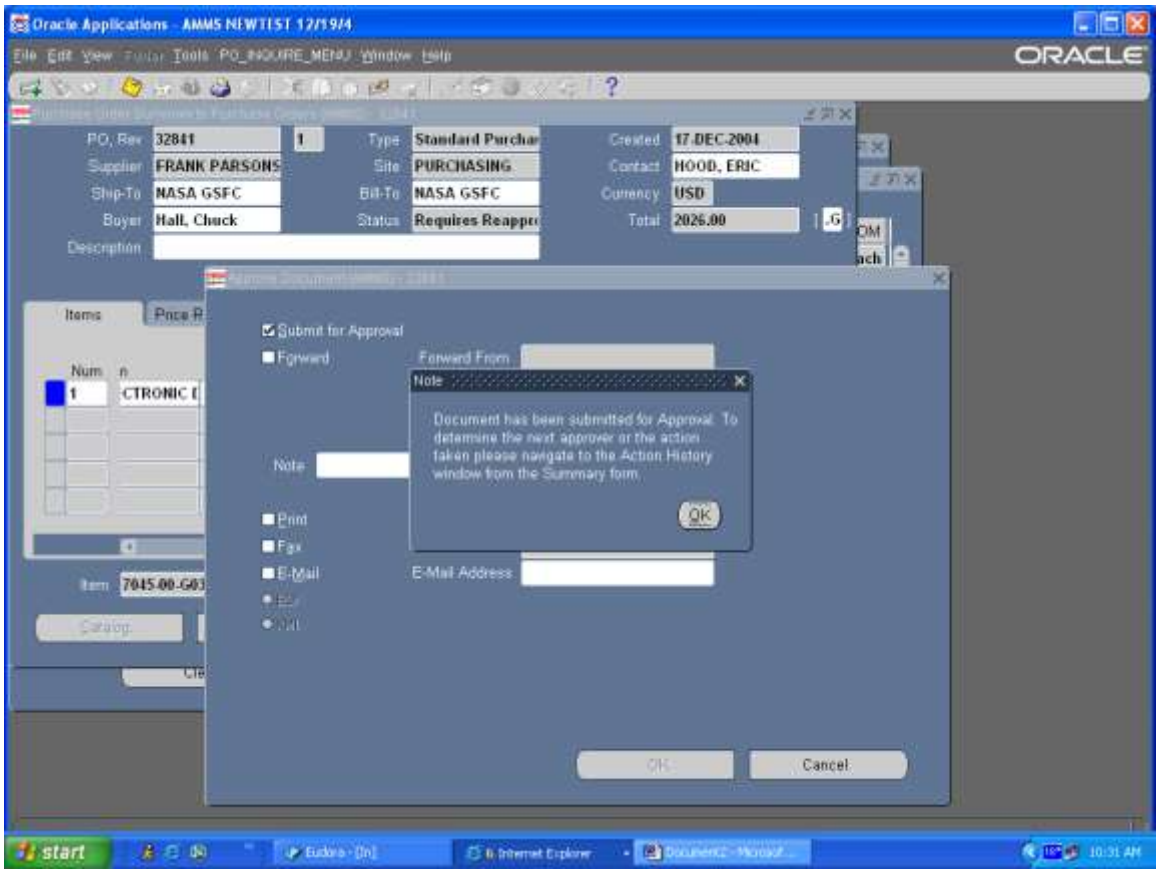
Step Description: Remove the check mark from the Email box and click on the OK button

Expected Results: A Note window will appear



Step Description: At the Note window, Document has been submitted for Approval, click OK

Expected Results: Return to the Purchase Order Summary Screen



Step Description: Take note that the Status on the Purchase order is now Approved.

<u>NOTE: Any changes made to a Purchase Order require a new printed copy of the Purchase Order.</u>

AMMS TRAINING SCRIPT
Using Purchase Order Summary

Purpose

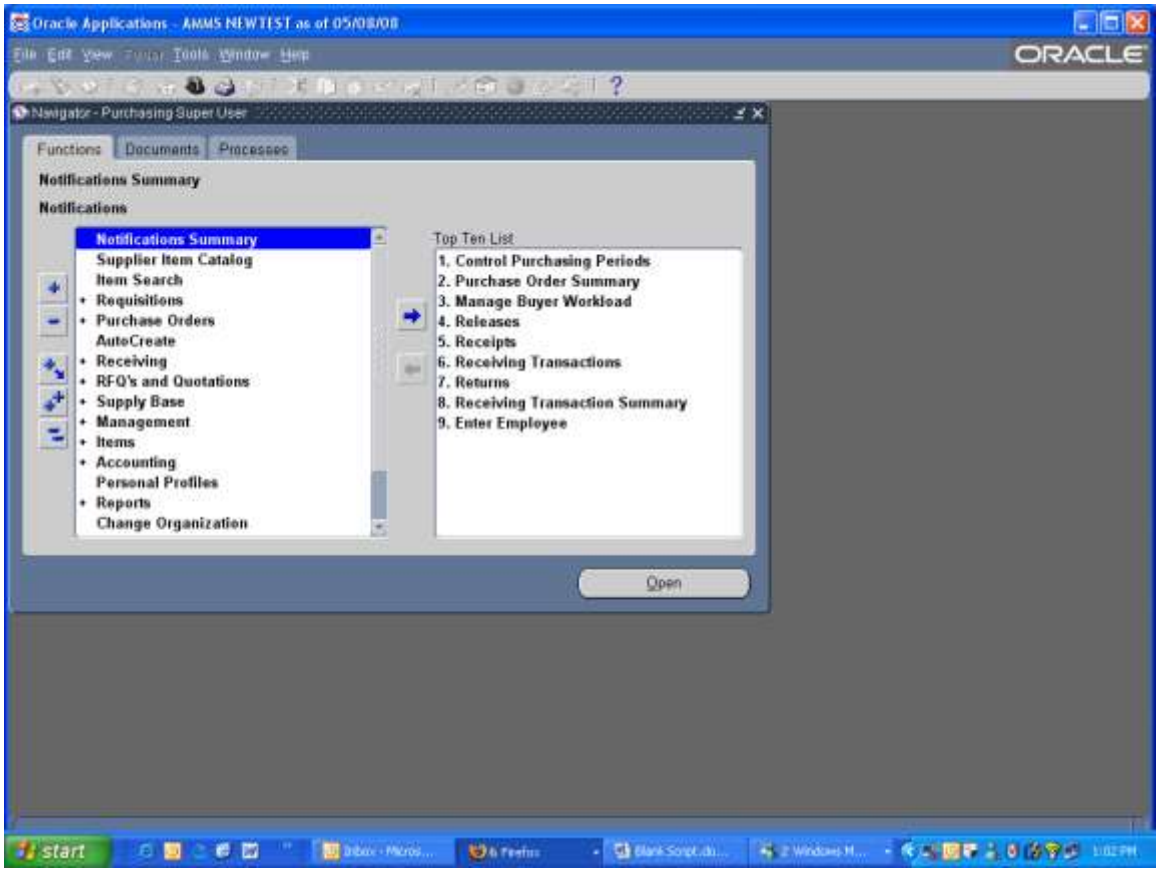
The purpose of this training script is to show how to get information on Purchase Orders from Purchase Order Summary

Audience

Prepared By	Theresa Coulson
Creation Date:	07/09/2008
Document Name	Purchase Order Summary.doc
Version	2
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Purchasing.	

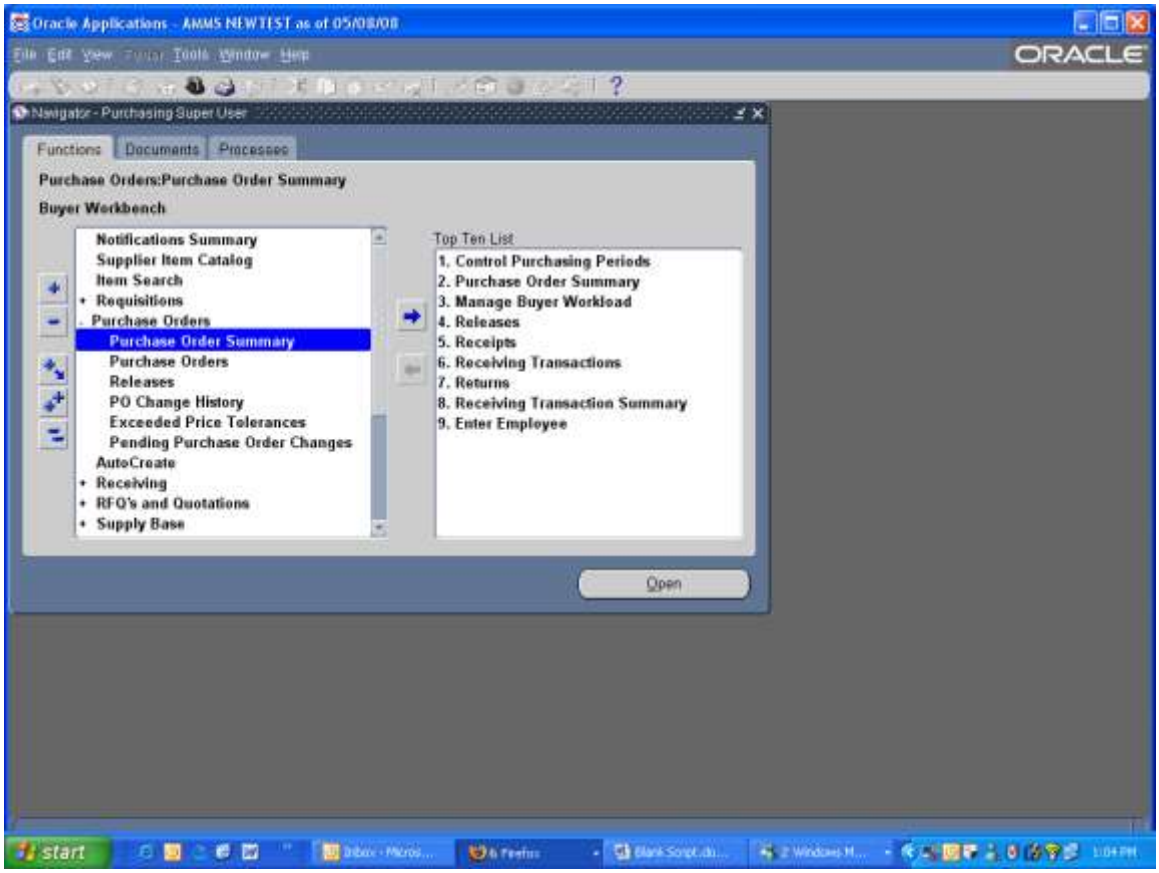
Step Description: Sign onto Oracle and select your Purchasing responsibility

Expected Results: Purchasing responsibility will appear



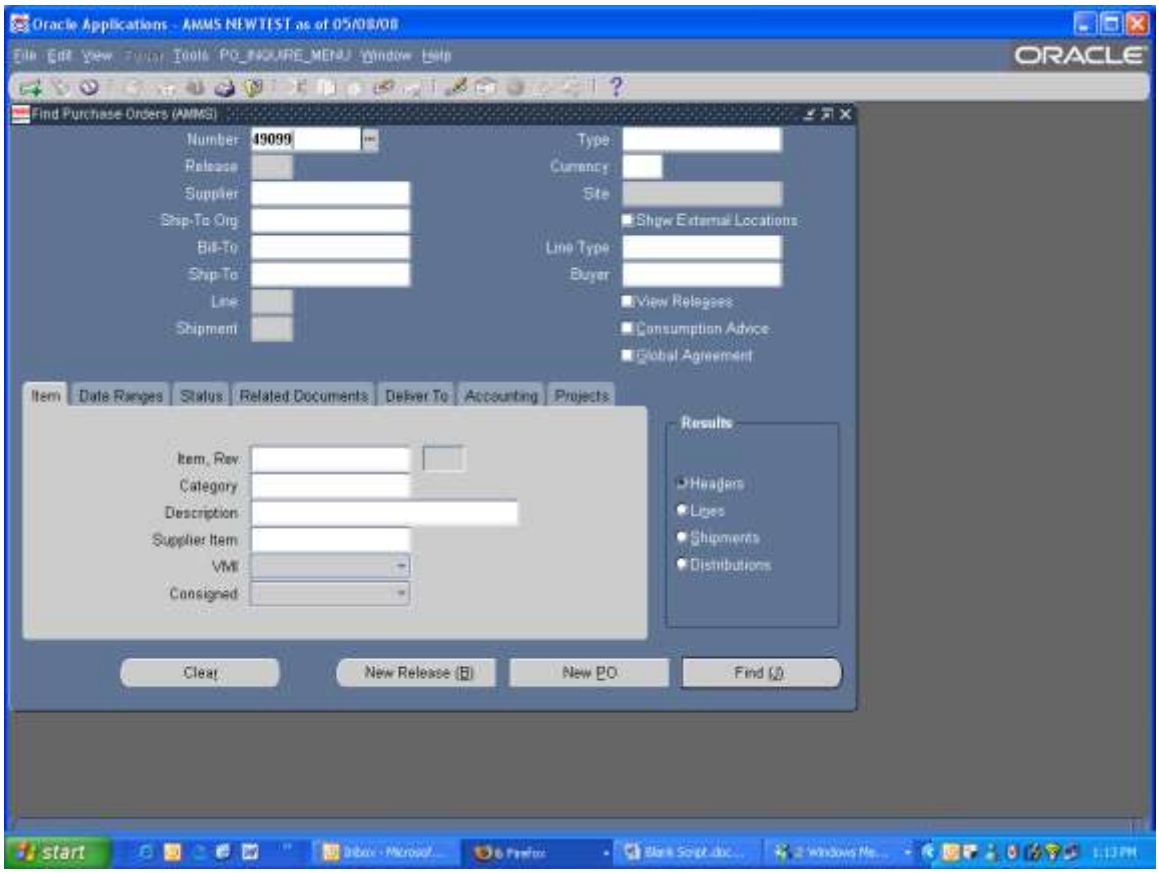
Step Description: From the Purchasing responsibility main menu select Purchase Orders > Purchase Order Summary click the open button

Expected Results: Find Purchase Order AMMS window will appear

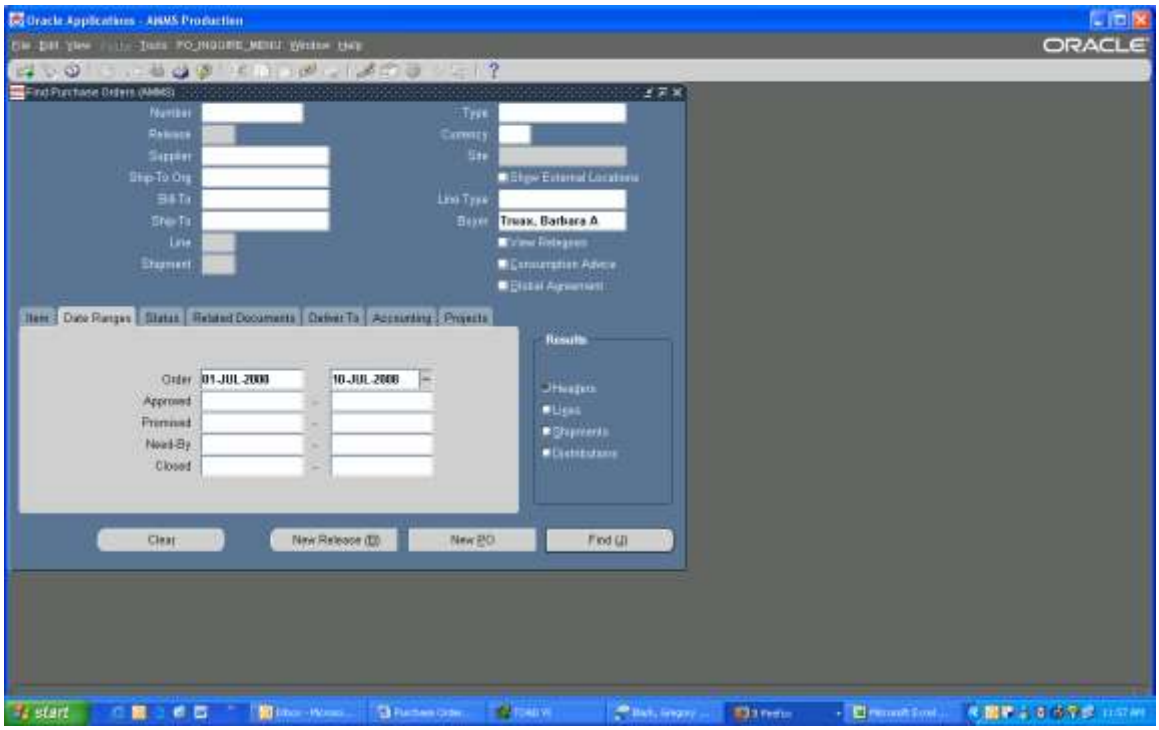


Step Description: From the Find Purchase Orders AMMS window you can search by many different criteria, here are some examples:

You can enter a specific Purchase Order number in the Number field, click on find to see different information about the purchase order, lines, shipments, status

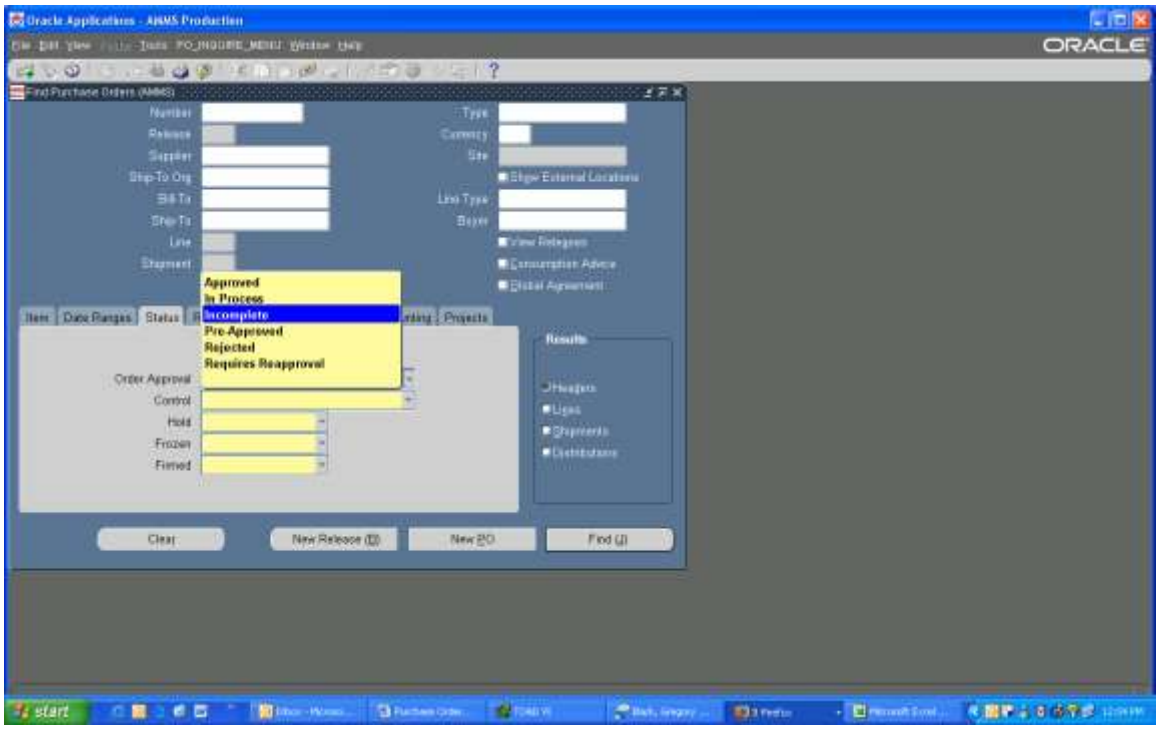


Step Description: You can also enter a Buyer name and look for specific purchase orders that a specific buyer has done, you can also set a date range

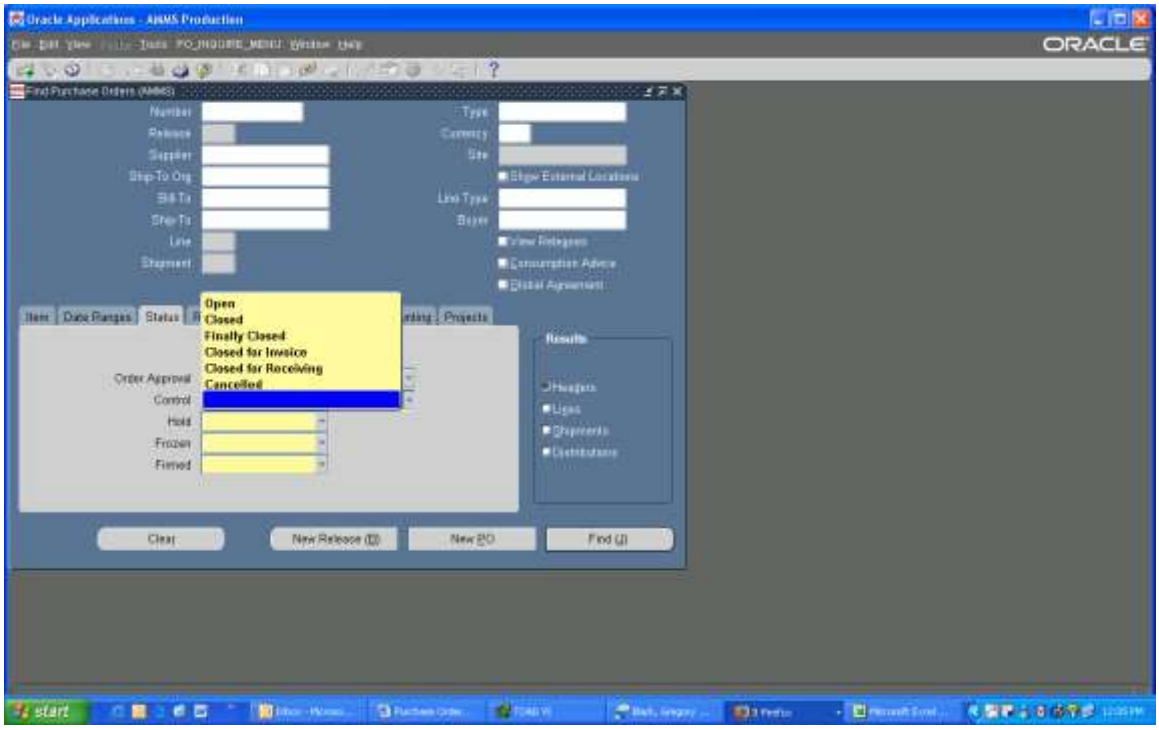


Step Description: You can also look for purchase orders by the status, there are two different statuses Order Approval Status and Control Status

These are the Order Approval Status



These are the Control Status



AMMS TRAINING SCRIPT

Project Parts Changes to Established Purchase Order

Purpose

The purpose of this training script is to show buyers how to make changes to established purchase orders

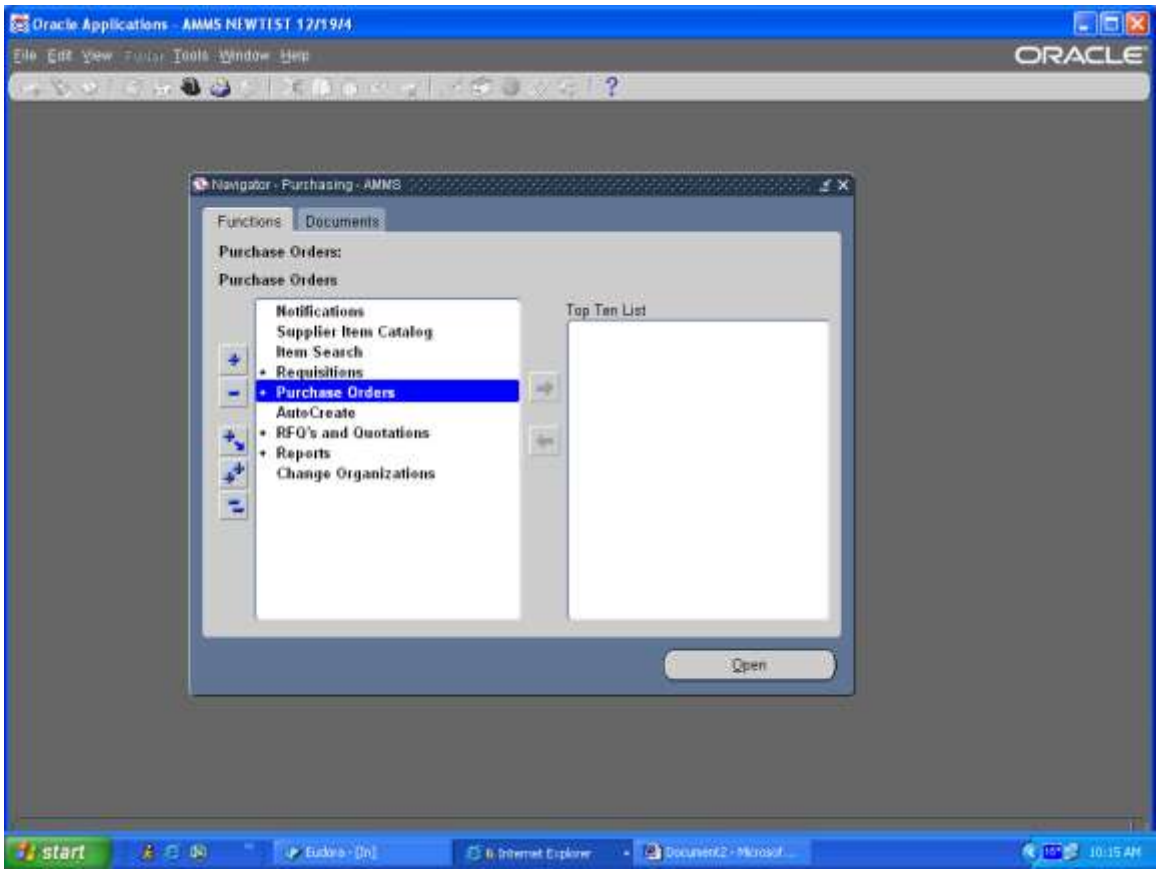
Audience

Buyers

Prepared By	Theresa Coulson
Creation Date:	05/10/2006
Document Name	View or Changes to Established Purchase Orders.doc
Version	2
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Purchasing.	

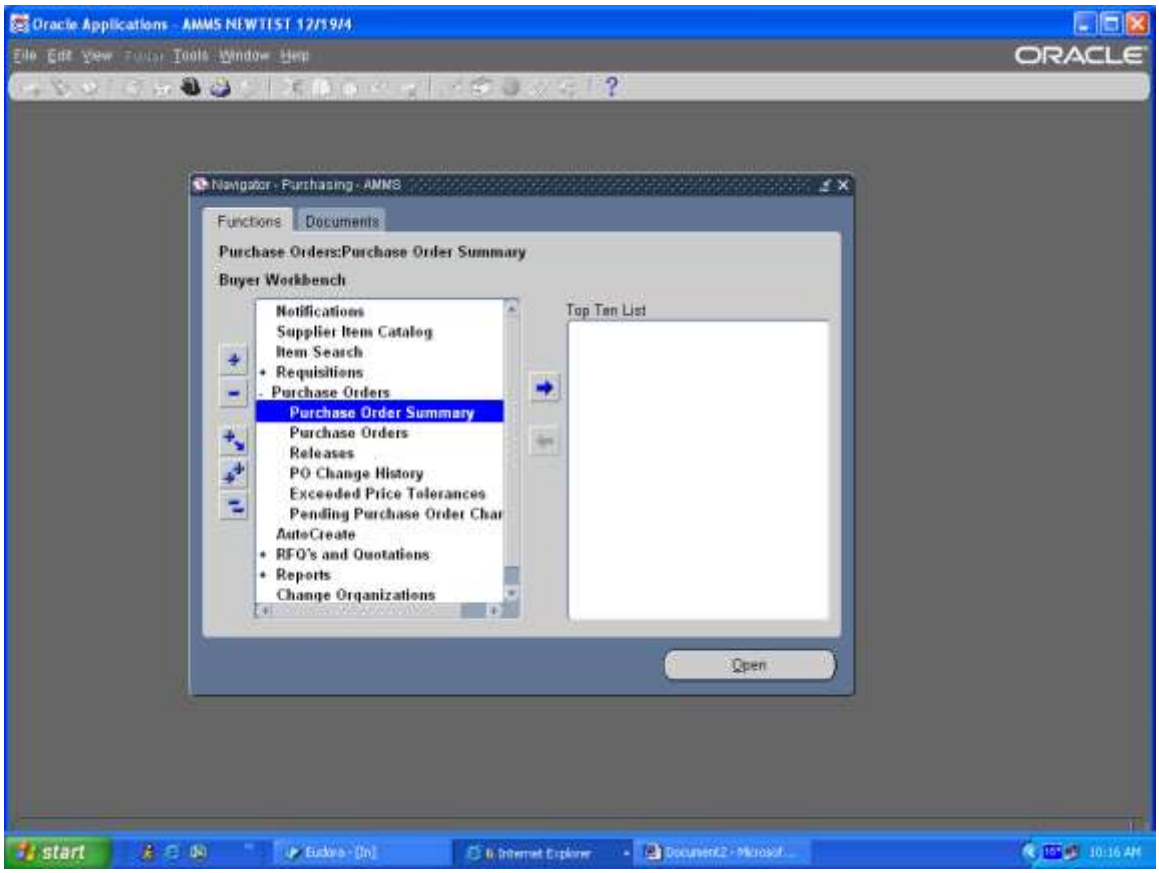
Step Description: Sign onto Oracle and select the Purchasing AMMS responsibility

Expected Results: The Purchasing AMMS main menu will appear



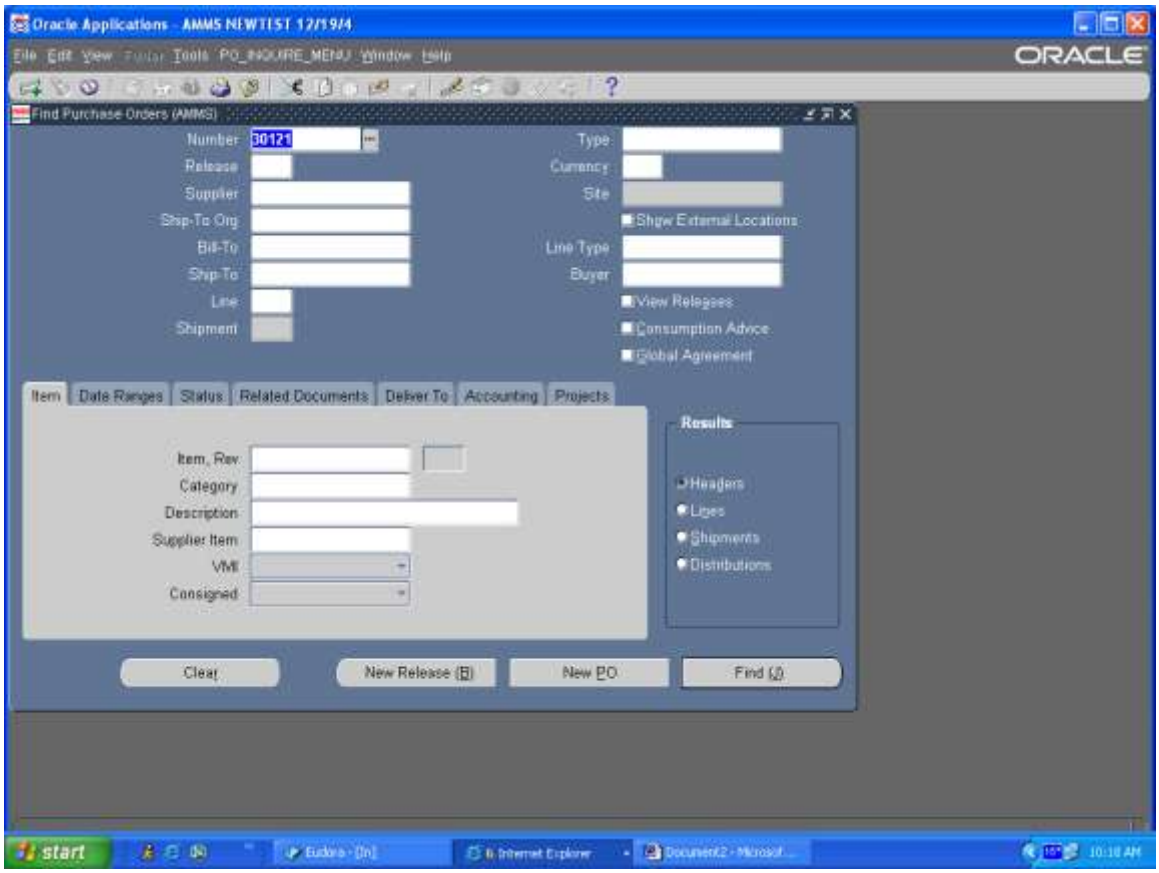
Step Description: From the Purchasing AMMS main menu select Purchase Orders > Purchase Order Summary, click on the Open button

Expected Results: The Find Purchase Order screen will appear



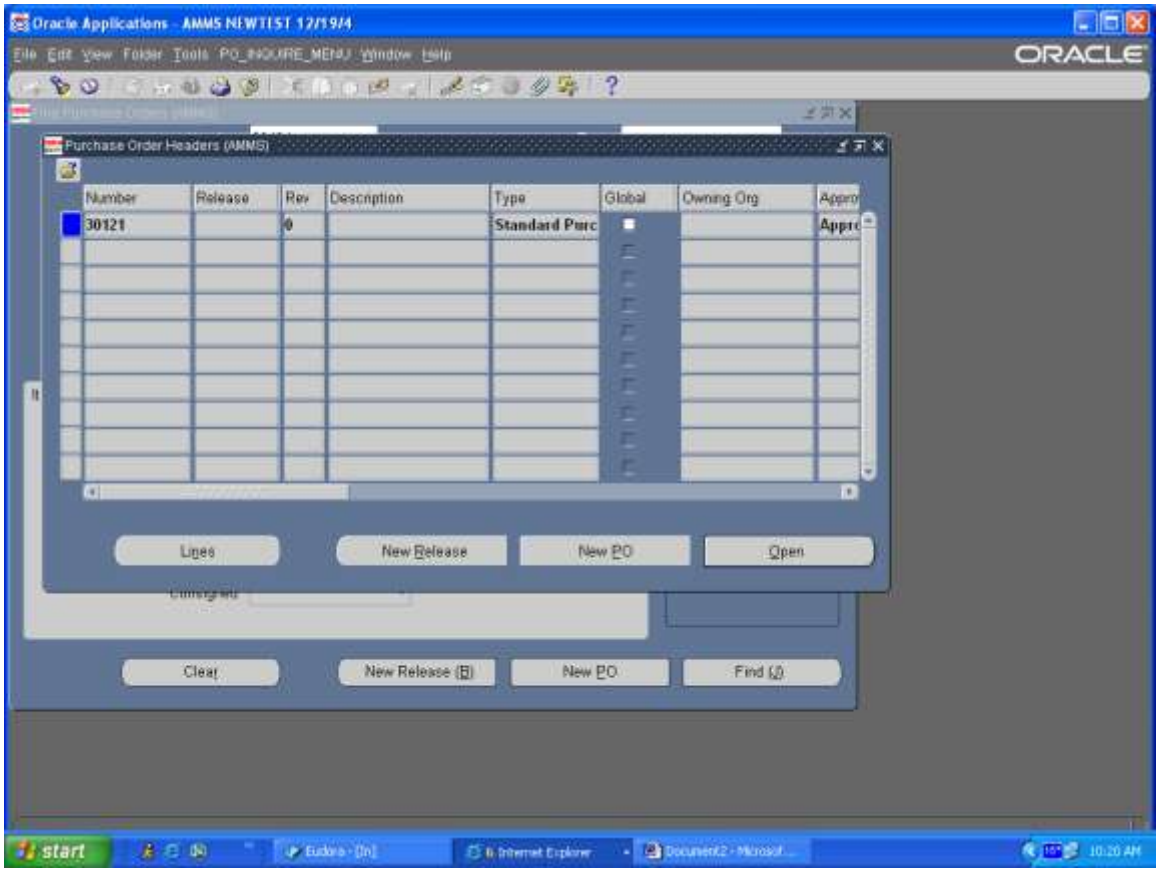
Step Description: In the Number field enter the purchase order number you want to view. Click on the Find button

Expected Results: The Purchase Order Header window will appear



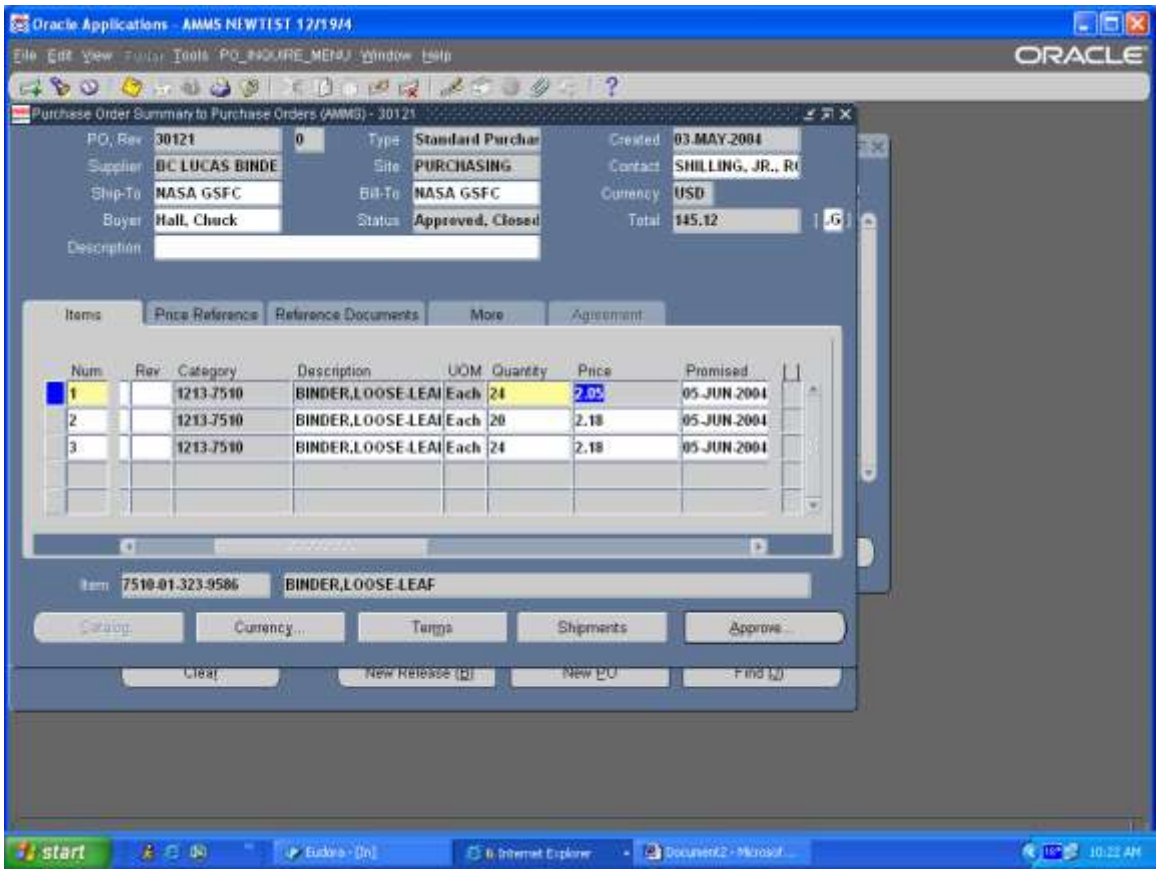
Step Description: To make changes to an item on the purchase order click on the Open button.

Expected Results: The Purchase Order Summary to Purchase Order screen will appear



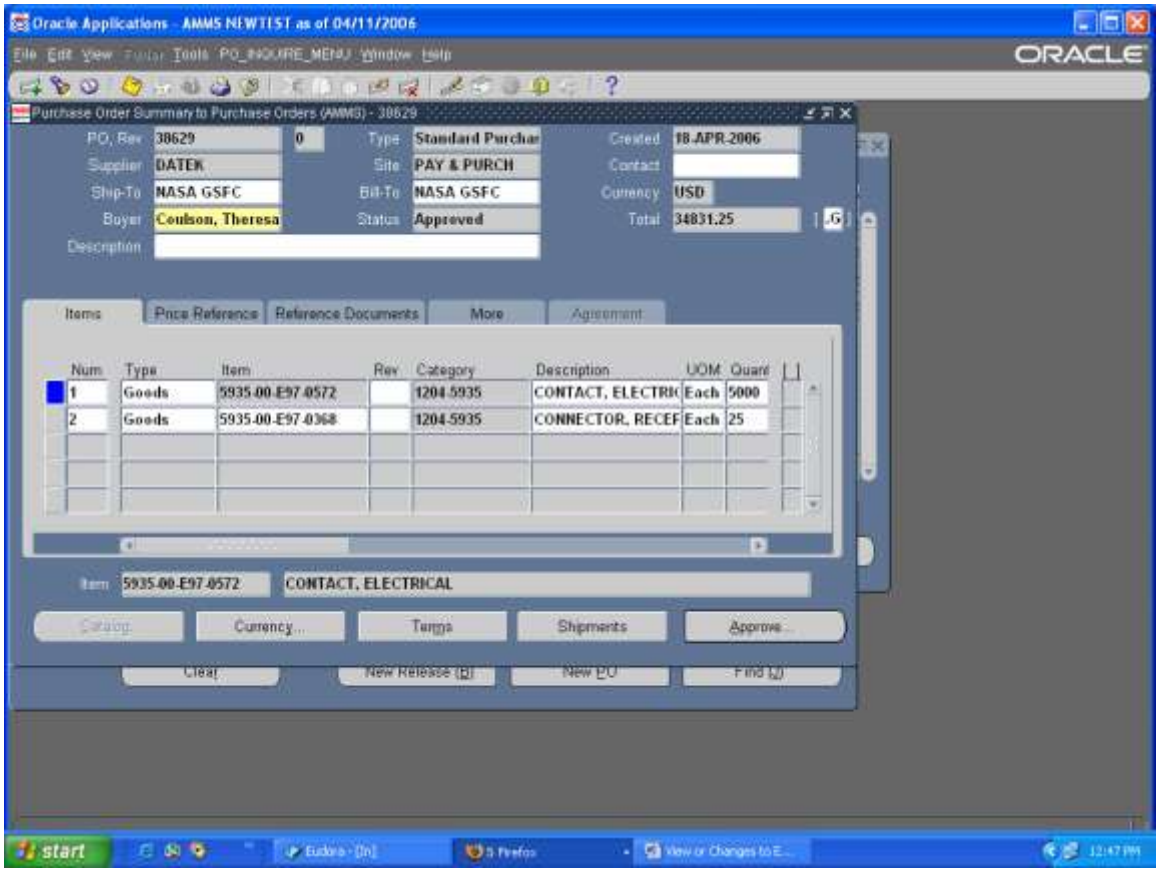
Step Description: Update the any necessary information if you need to change the cost, click on the price field and update the cost. If you need to change any other information select the field and make the appropriate changed.

Expected Results: Information will change



Step Description: After you have made the changes to the purchase order, you MUST put the changes in the Note to Supplier field. Click on the Terms button at the bottom of the screen.

Expected Results: Terms and Conditions window will appear



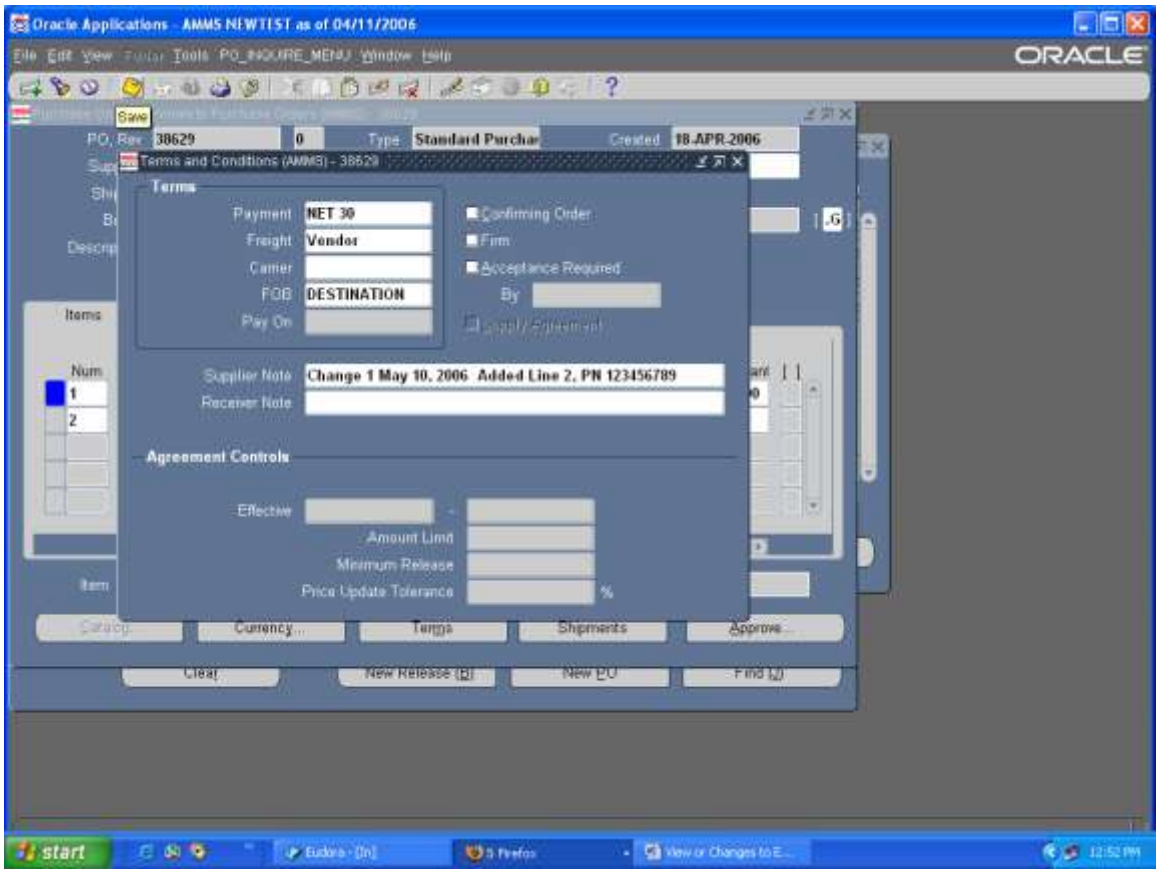
Step Description: In the Note to Supplier field enter what was changed in this format:

<u>Use the Note to Supplier field for changes to PO only</u>.

Example: Change 2, April 10, 2006 (list the change number to the supplier along with the date, do not abbreviate)

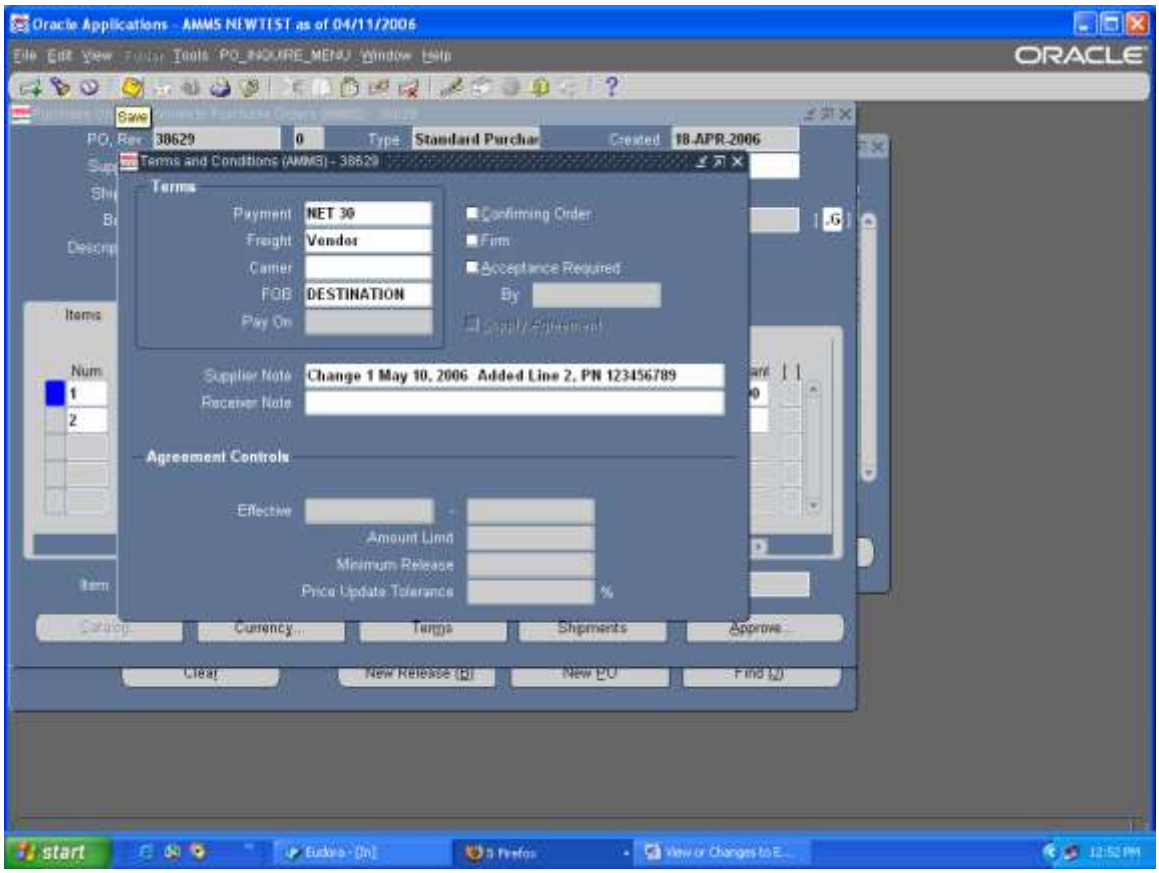
Added Line 12, PN 788978 **Deleted Line 3, PN 245895** **Added Line 16, Pre-cap Inspection, PN 78985** **Increased Quantity on Line 4, PN 898574, from 10 each to 15 each.** **Decreased Quantity on Line 6, PN4568, from 12 each to 9 each**

Expected Results: Field will be populated



Step Description: Click on the Save button

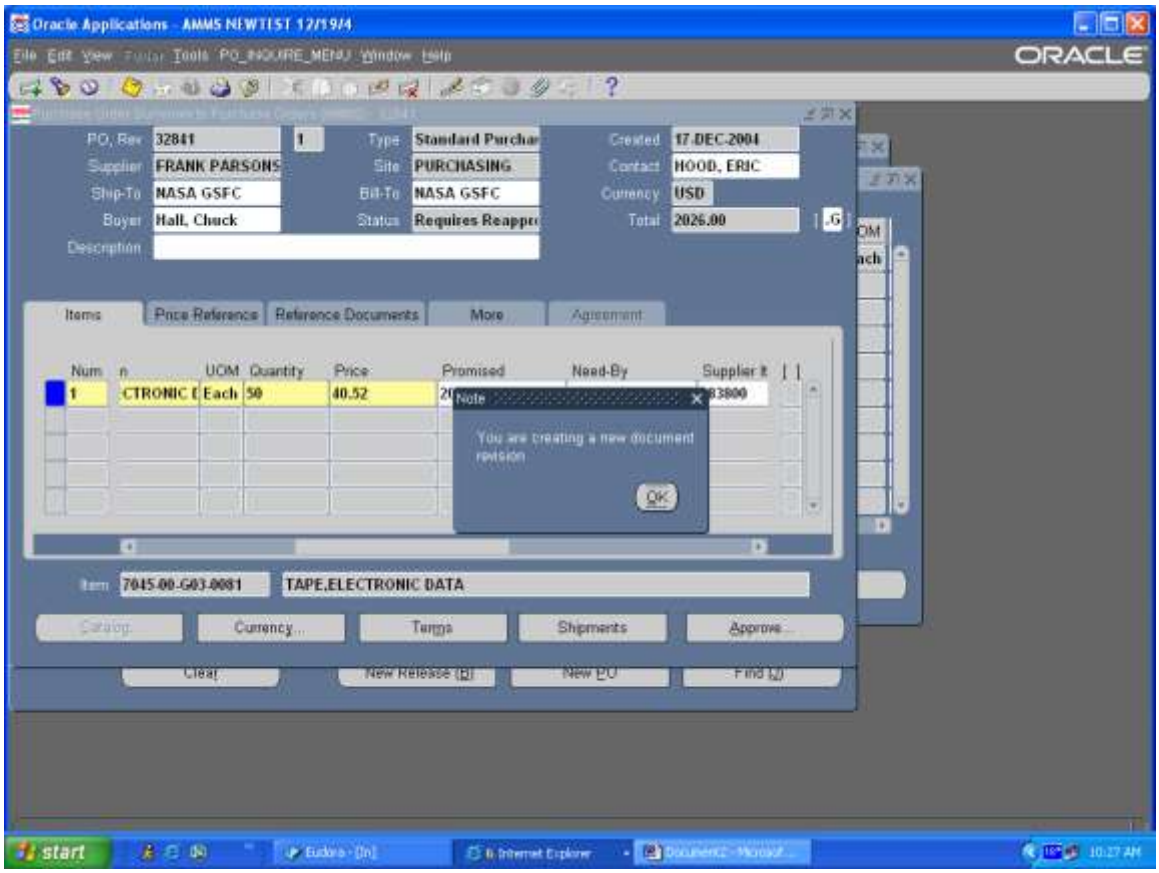
Expected Results: Note Creating new document revision



NOTE: YOU MUST PUT INFORMATION IN THE NOTE TO SUPPLIER FIELD FOR EVERY CHANGE THAT IS MADE TO A PO. IF INFORMATION ALREADY EXISTS IN THE FIELD, GO TO THE END OF THAT STATEMENT AND START A NEW STATEMENT.

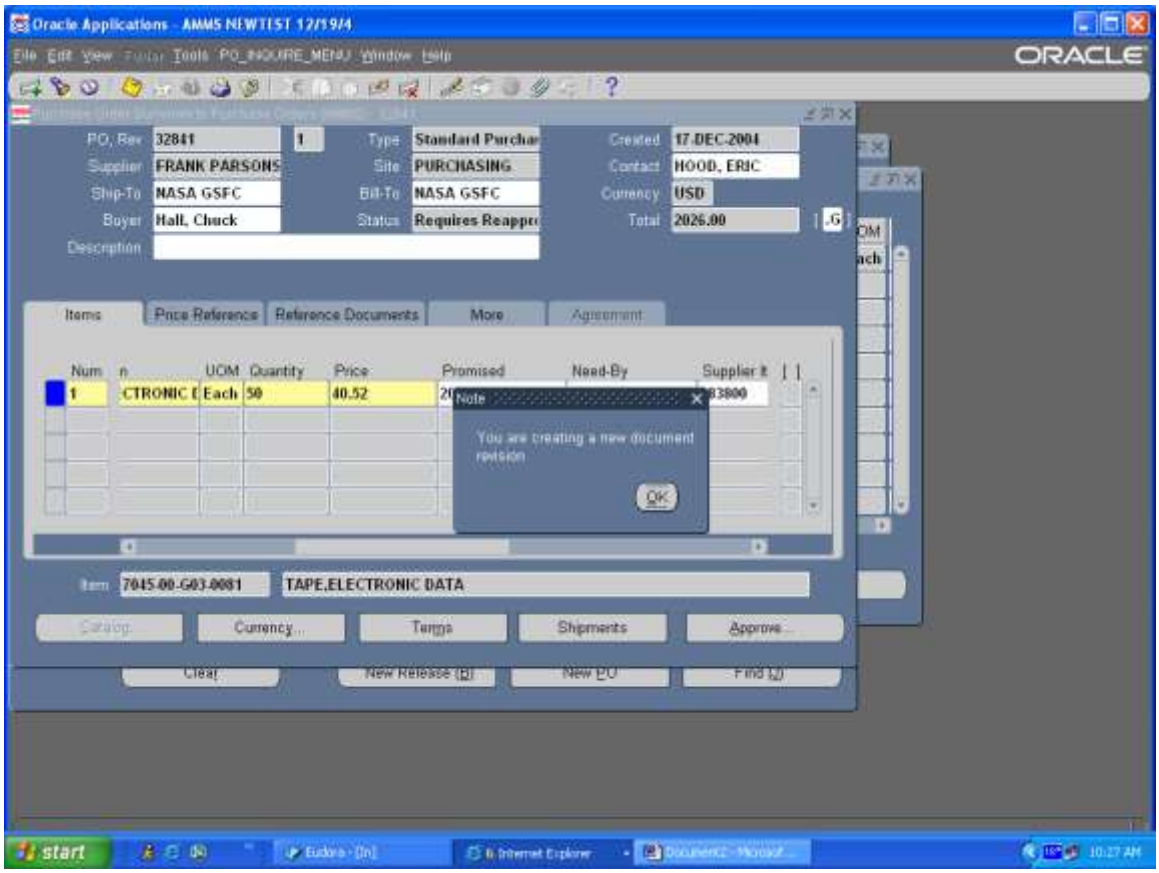
Step Description: Once you have made desired changes, Save your work.

Expected Results: A note window will appear



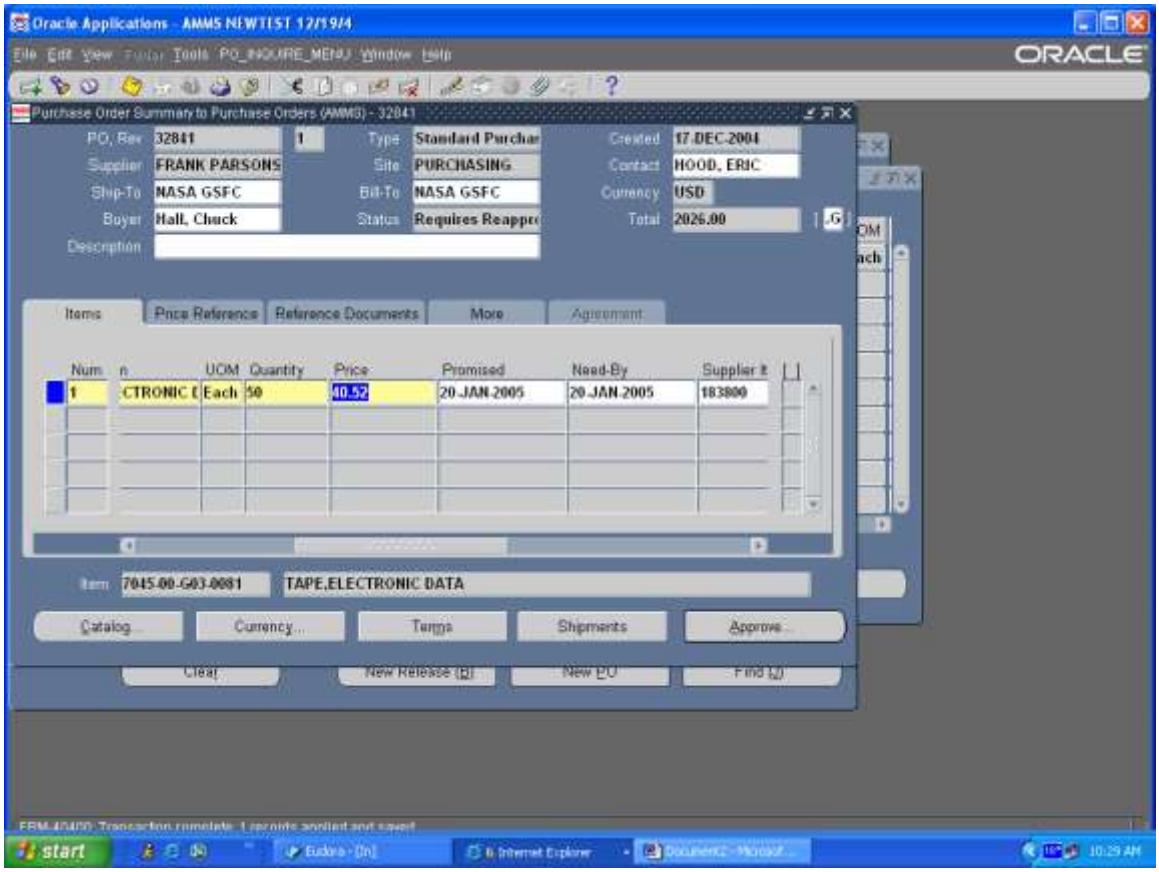
Step Description: Click Ok to the Note

Expected Results: Window will go away



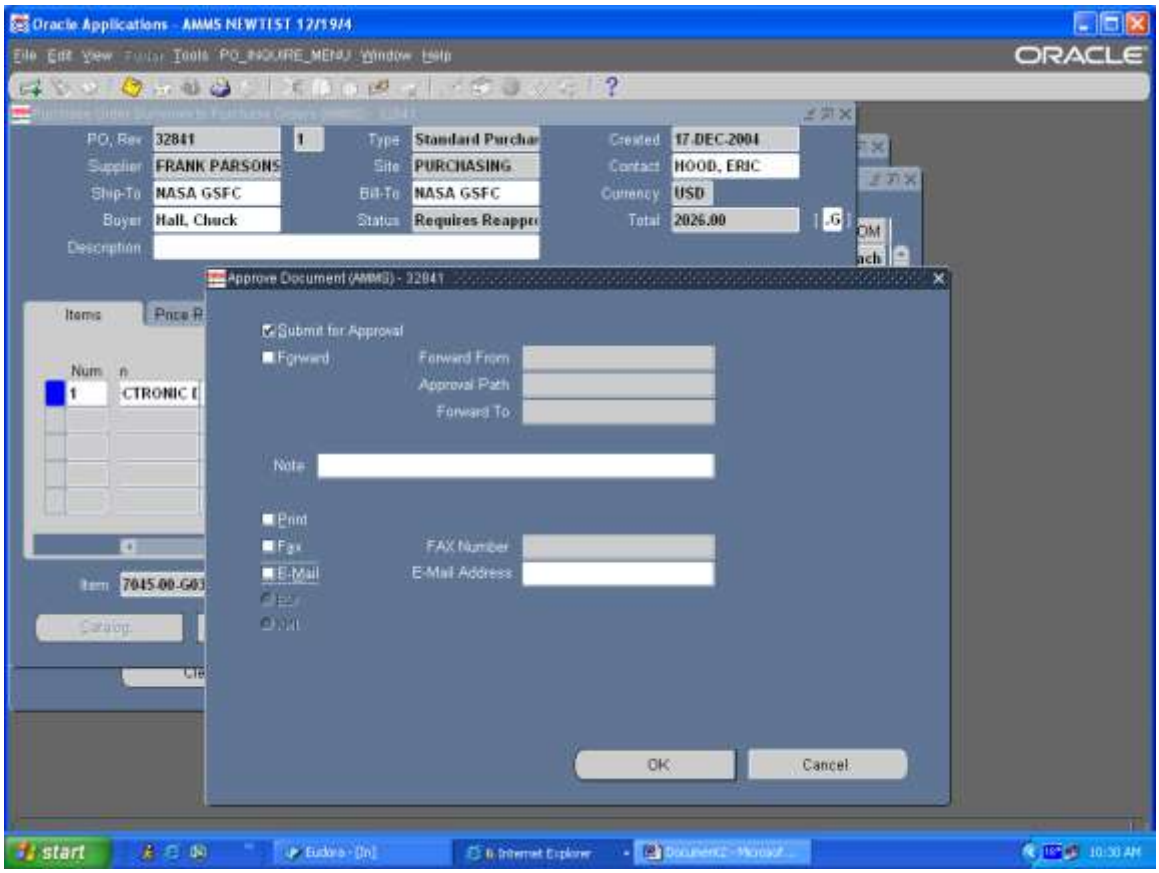
Step Description: Take note that Status on the PO is Requires Re-Approval, any changes made to a purchase order the purchase order will have to be re-approved. Click on the Approve button.

Expected Results: Approval Documents window will appear



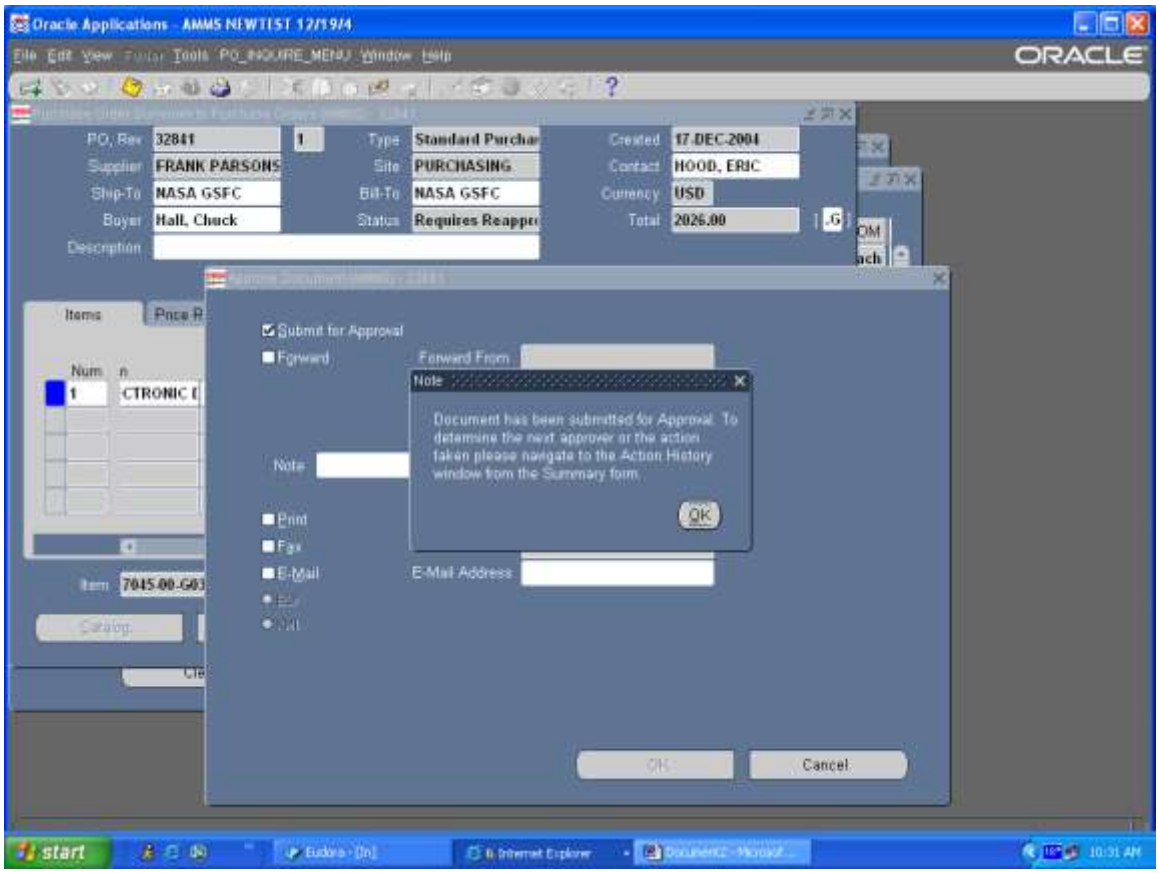
Step Description: Remove the check mark from the Email box and click on the OK button

Expected Results: A Note window will appear



Step Description: At the Note window, Document has been submitted for Approval, click OK

Expected Results: Return to the Purchase Order Summary Screen



Step Description: Take note that the Status on the Purchase order is now Approved.

NOTE: Any changes made to a Purchase Order require a new printed copy of the Purchase Order.

AMMS RECEIVING TRAINING SCRIPTS

AMMS TRAINING SCRIPT

Accept and Deliver a Standard Receipt

Purpose

The purpose of this training script is to provide detailed instructions on how to process a receipt for an item, receive, accept and deliver

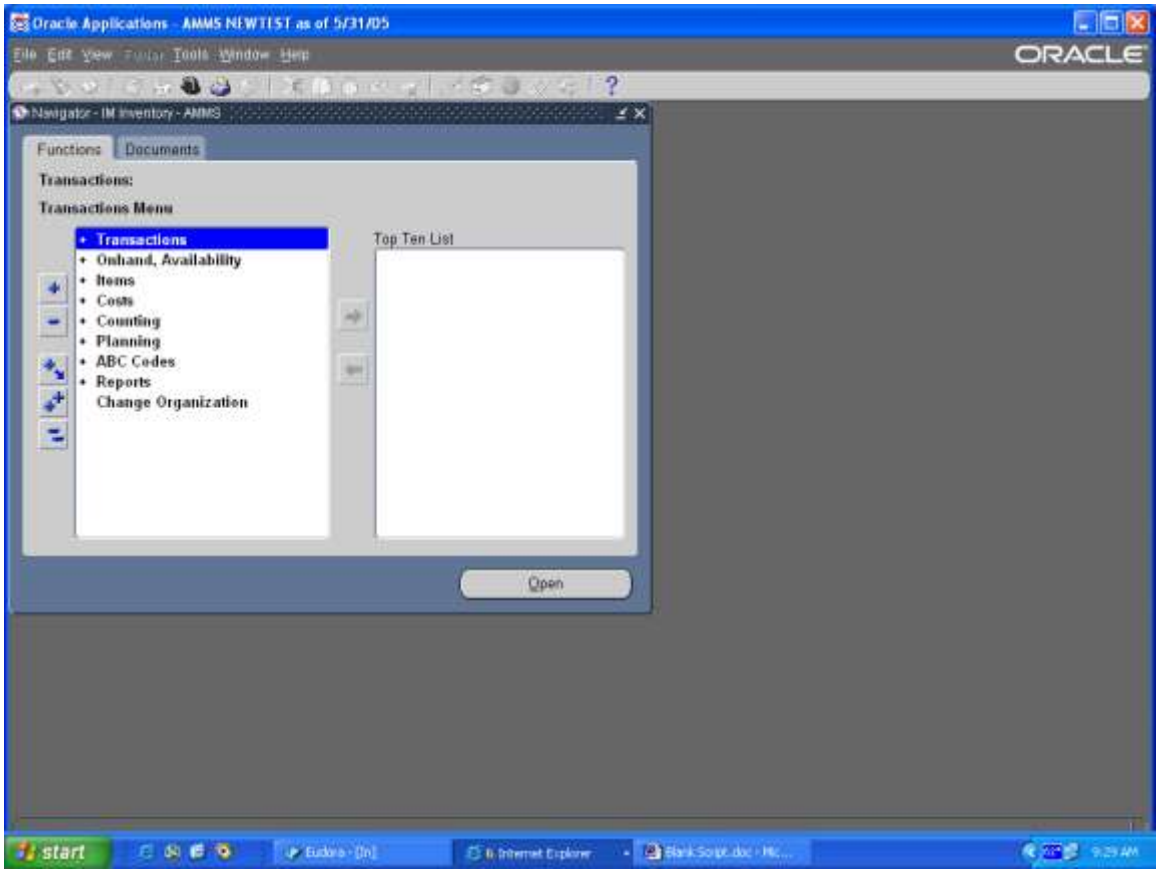
Audience

Material coordinators, Supply Technicians, and Inspectors

Prepared By	Theresa Coulson
Creation Date:	08/22/2005
Document Name	Accept and Deliver a Standard Receipt.doc
Version	4
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Receiving.	

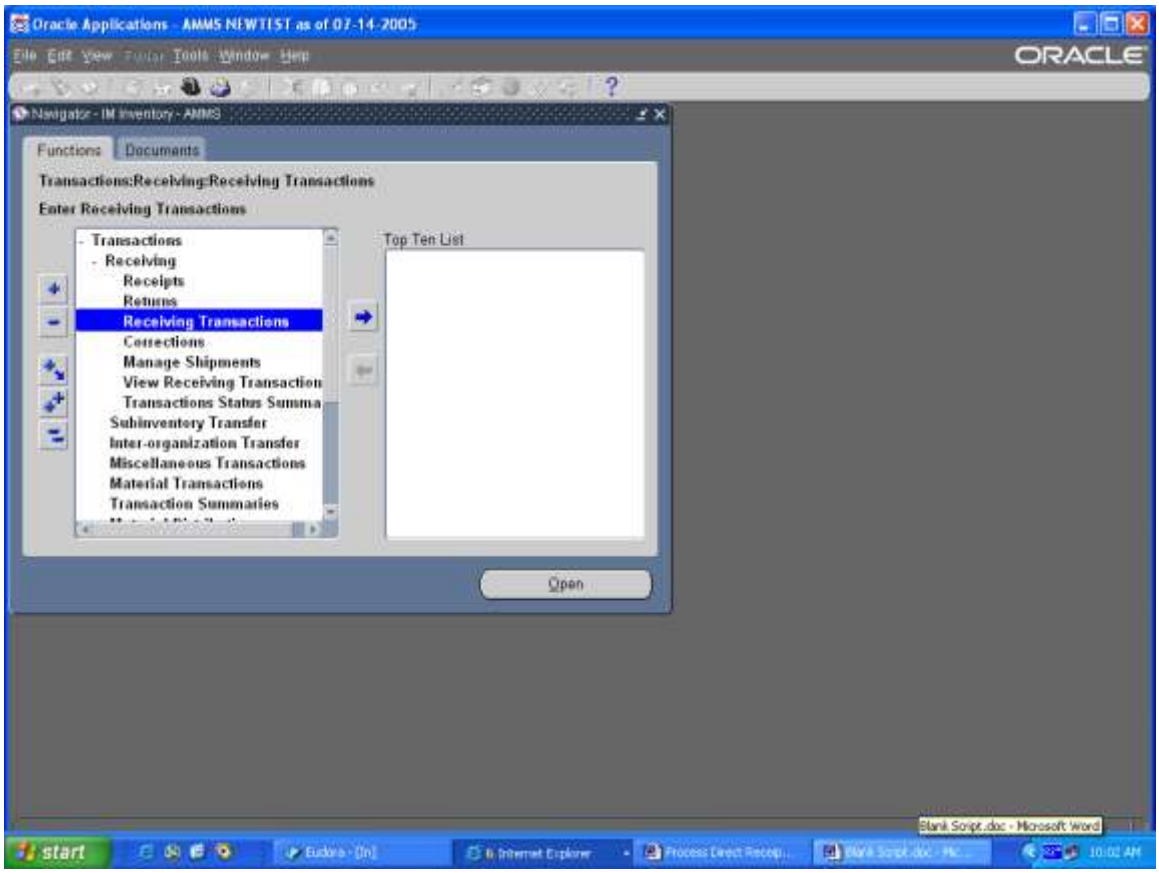
Step Description: Sign onto Oracle and select the Receiving Inventory AMMS responsibility

Expected Results: Receiving Inventory AMMS main menu will appear



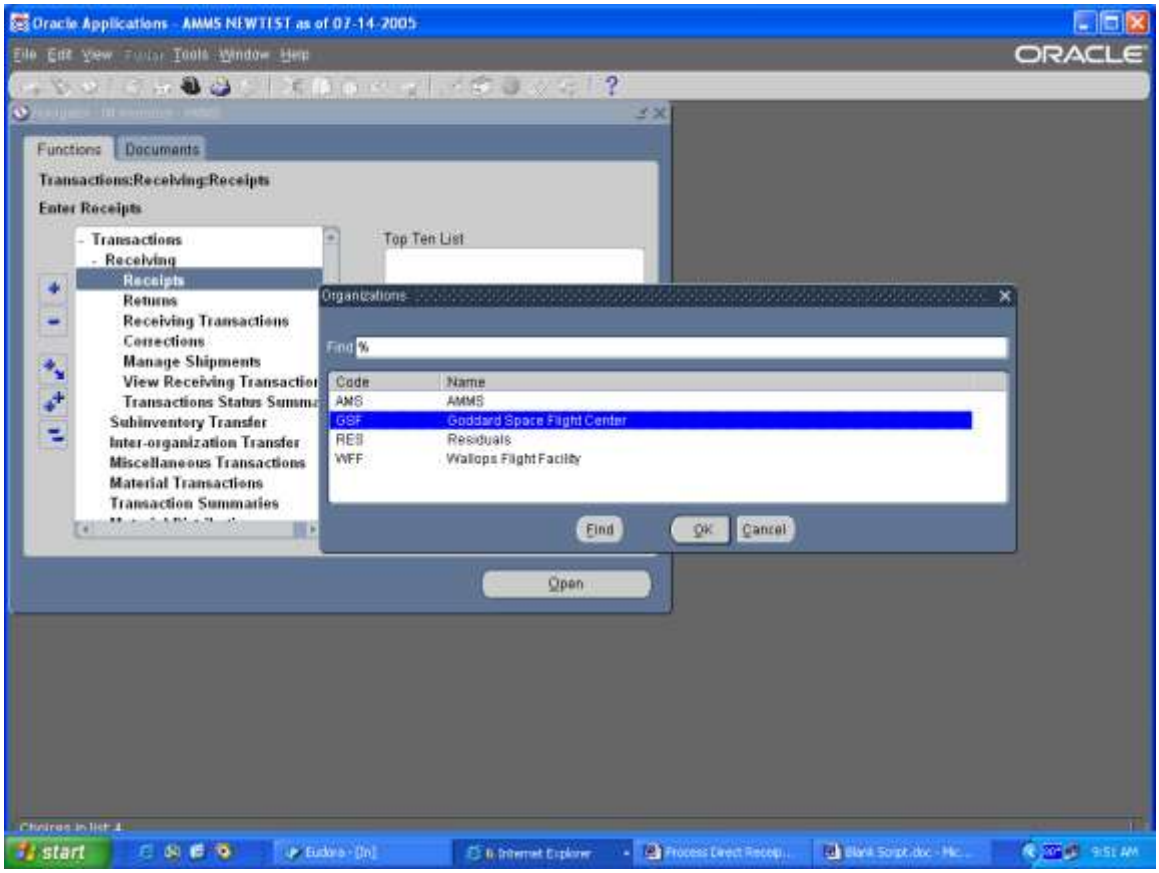
Step Description: From the Receiving Inventory AMMS main menu select Transactions> Receiving> Receiving Transactions, click on the Open button

Expected Results: Find Receiving Transactions window will appear



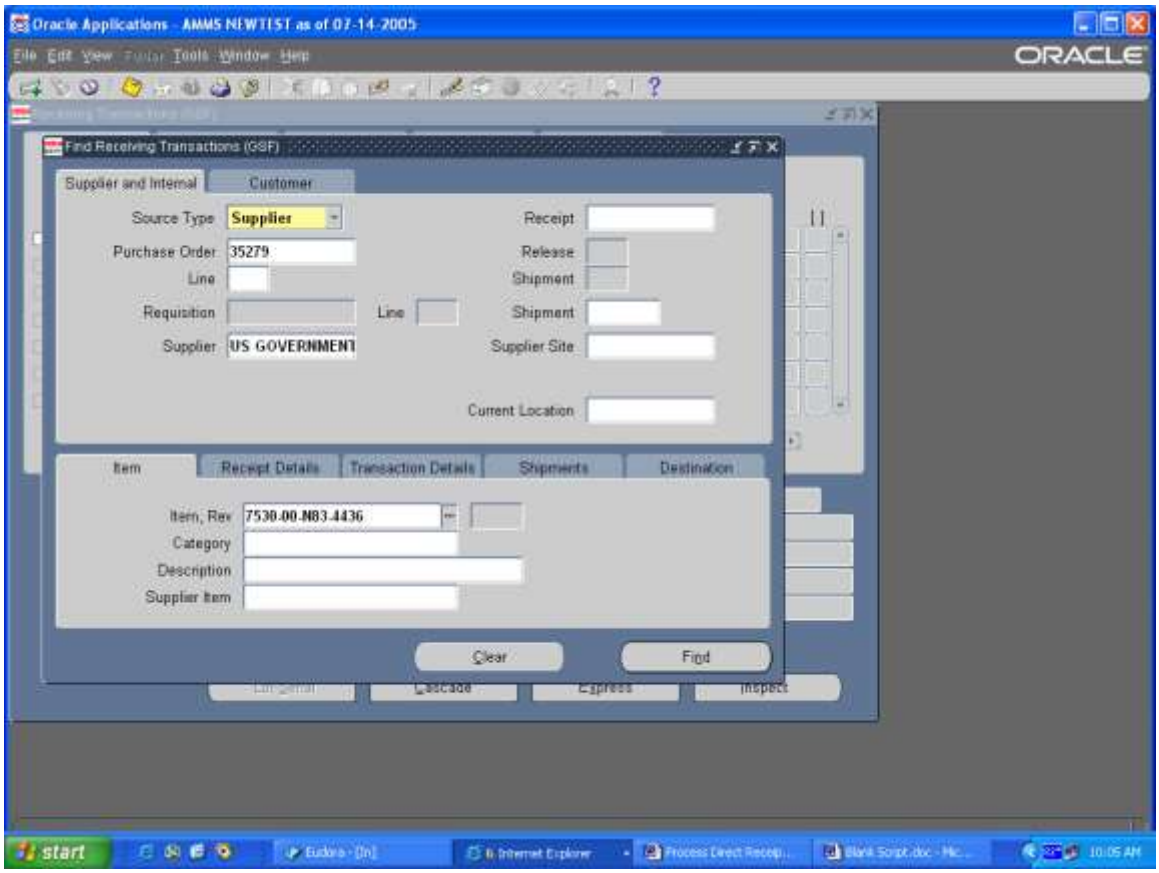
Step Description: From the Organization window select the appropriate organization. GSF for Goddard or WFF for Wallops, click the OK button

Expected Results: Find Expected Receipts window will appear



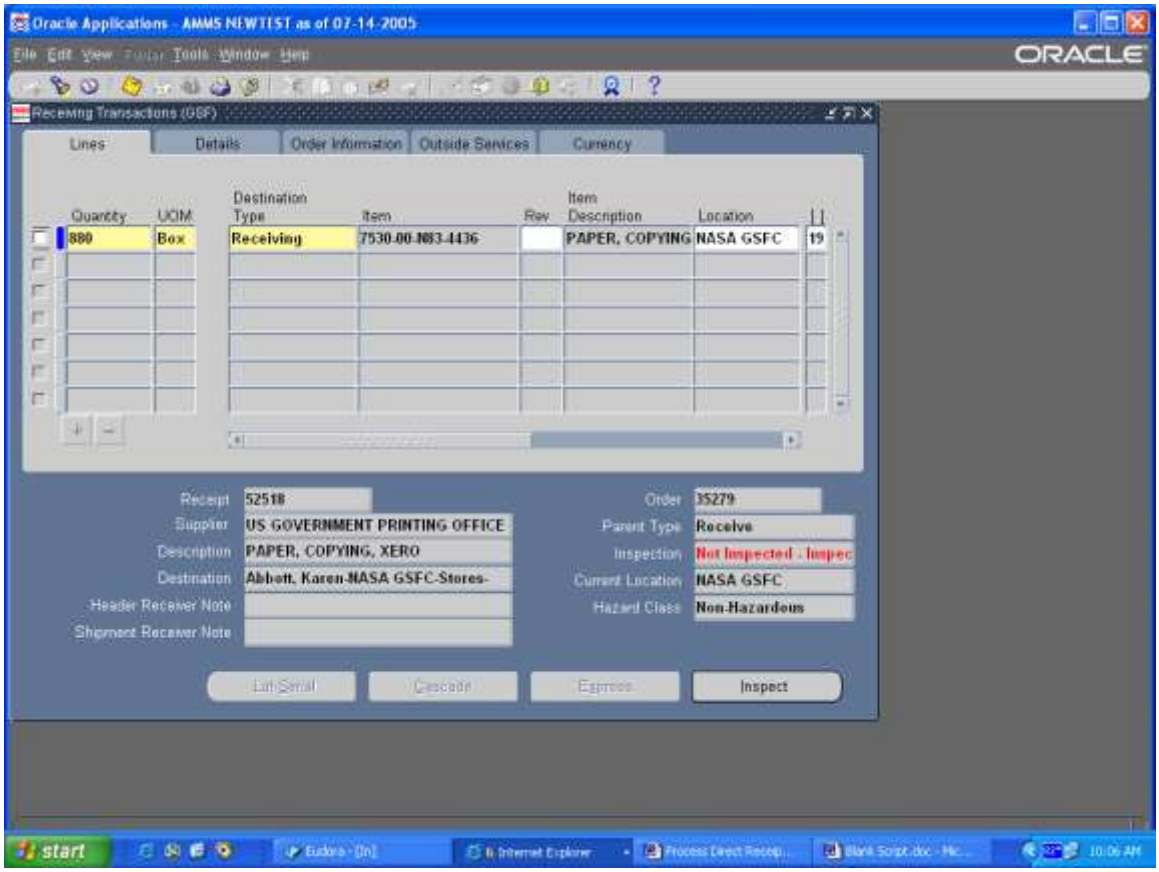
Step Description: At the Find Receiving Transactions window in the Purchase Order field enter the PO number for the material you are receiving, if known enter the stock number in the Item, Rev field click on the Find button

Expected Results: Receiving Transactions window will appear



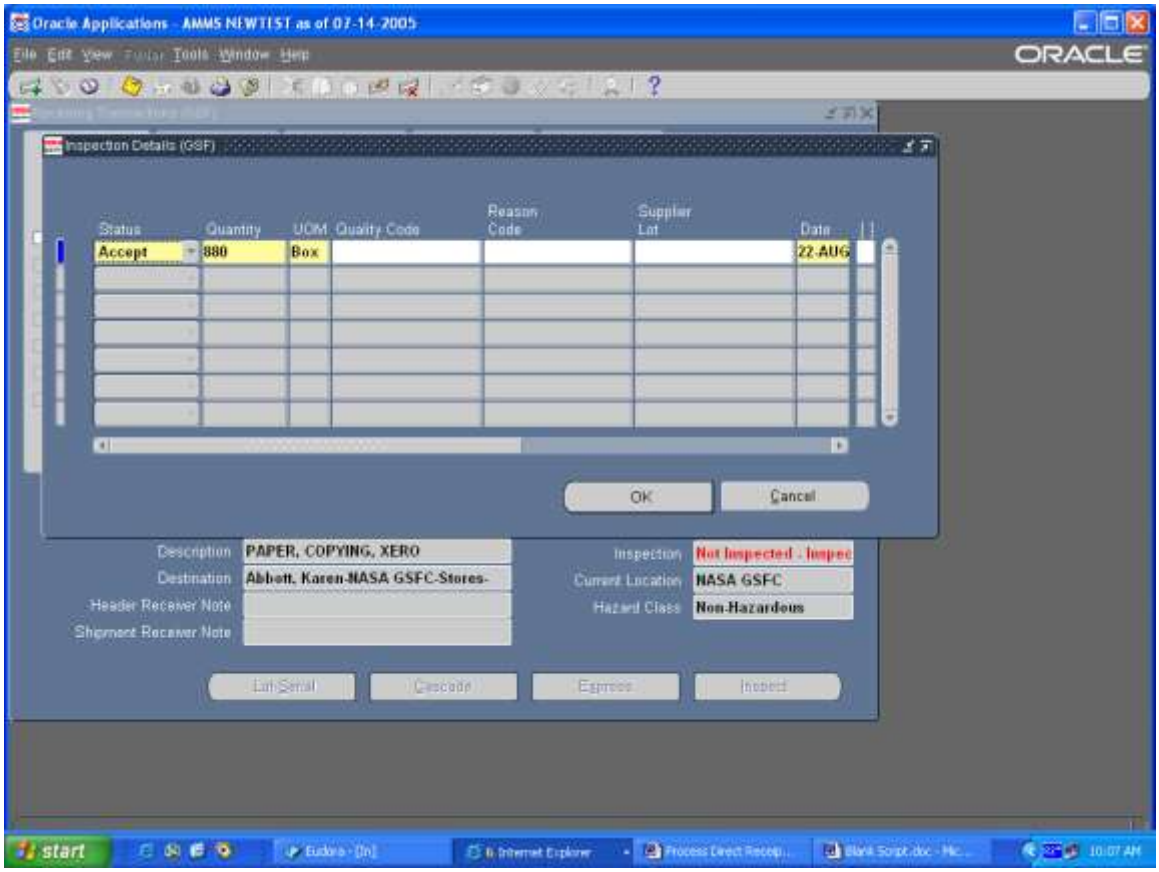
Step Description: In the bottom right hand corner, click on the Inspect button

Expected Results: Inspection Details window will appear



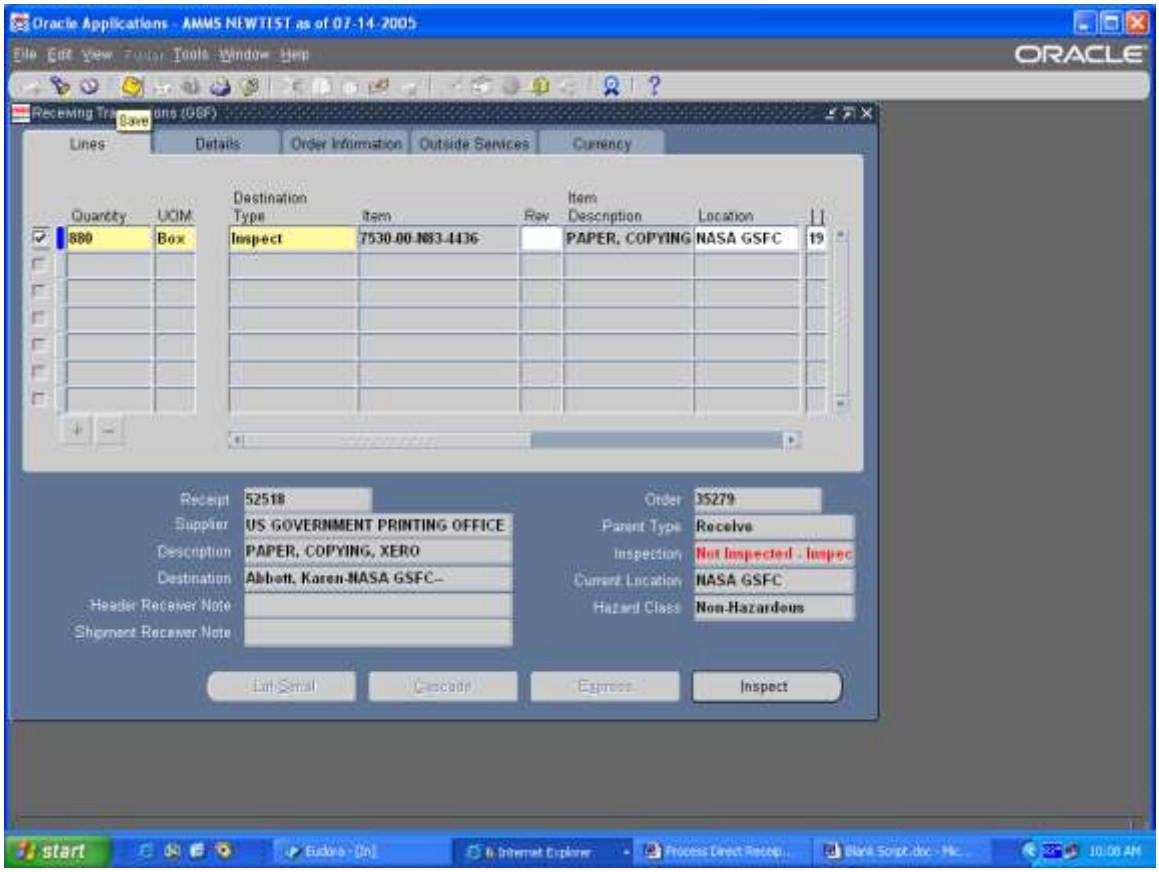
Step Description: At the Inspection Details window click on the OK button

Expected Results: Return to Receiving Transactions window



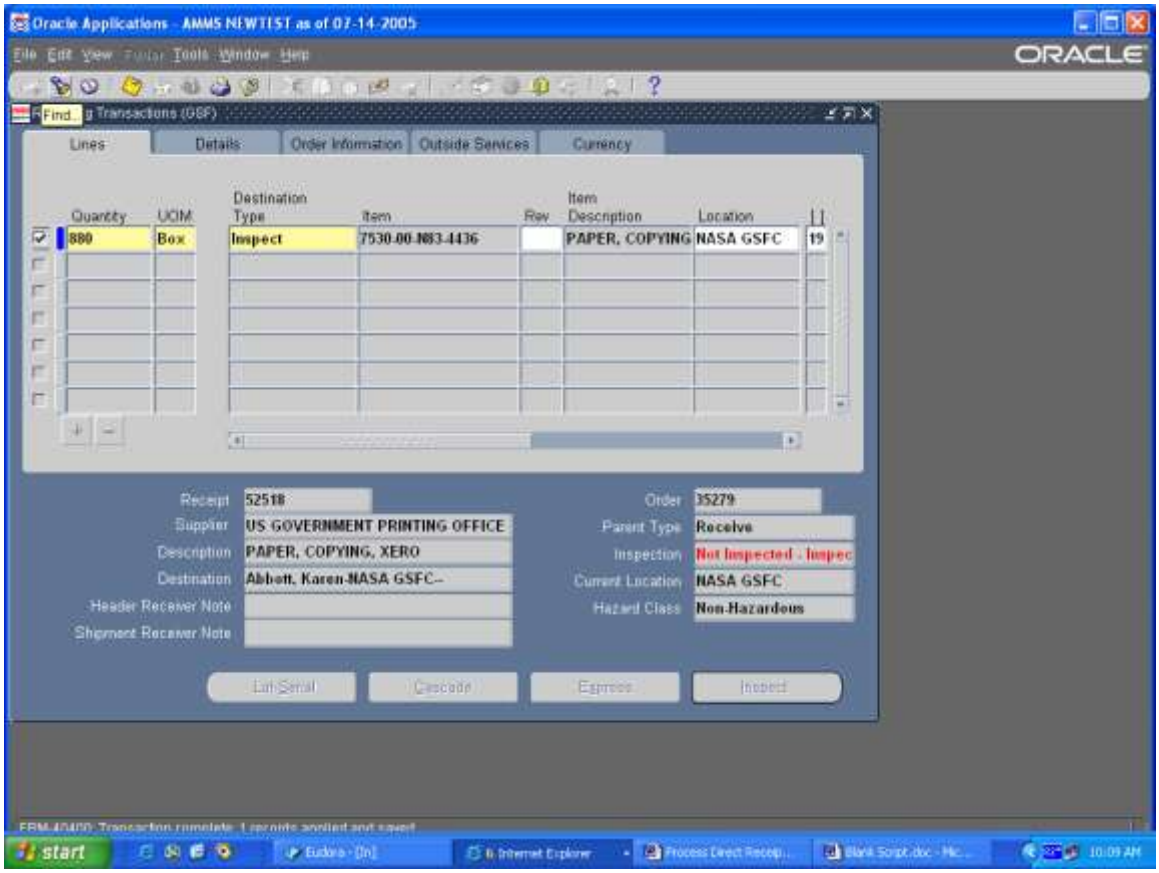
Step Description: Save your work

Expected Results: Transactions Complete and Applied Message



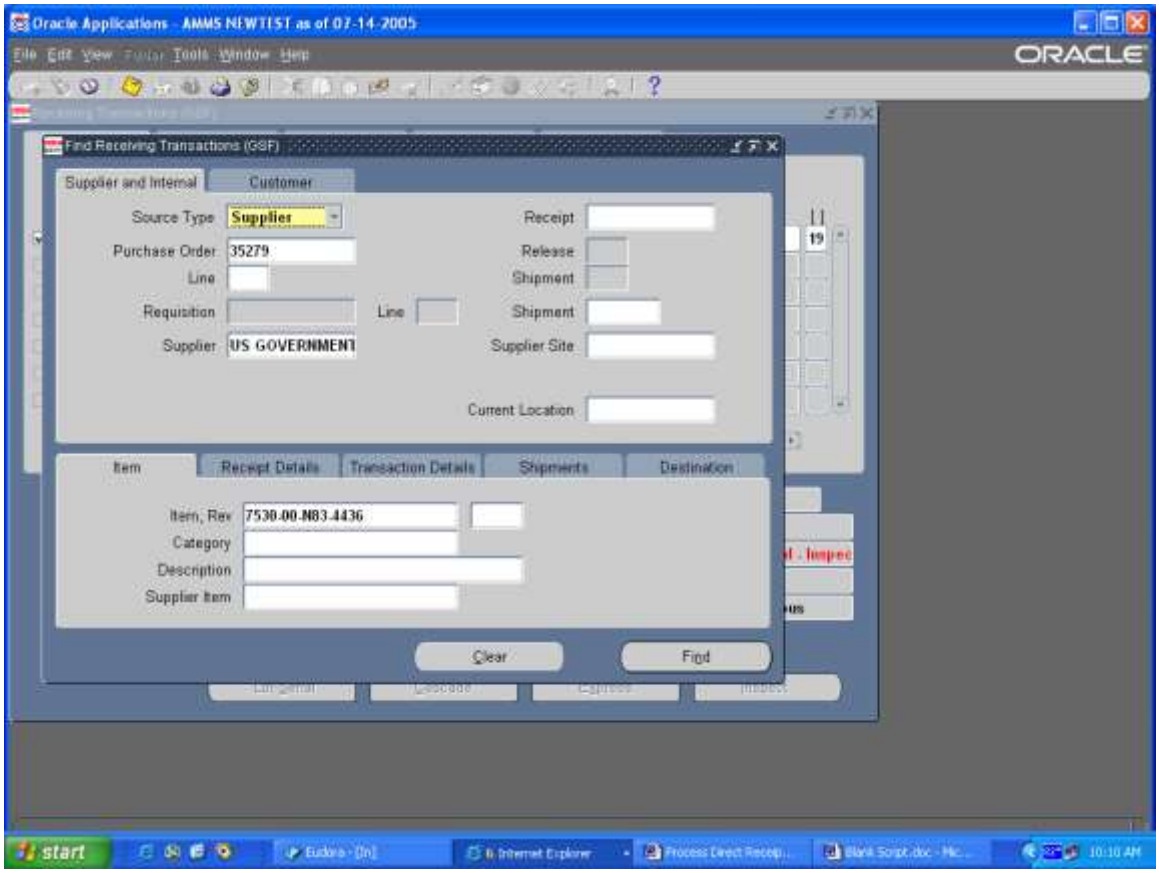
Step Description: From the toolbar select the flashlight to “refresh” your window

Expected Results: Return to the Find Receiving Transactions window



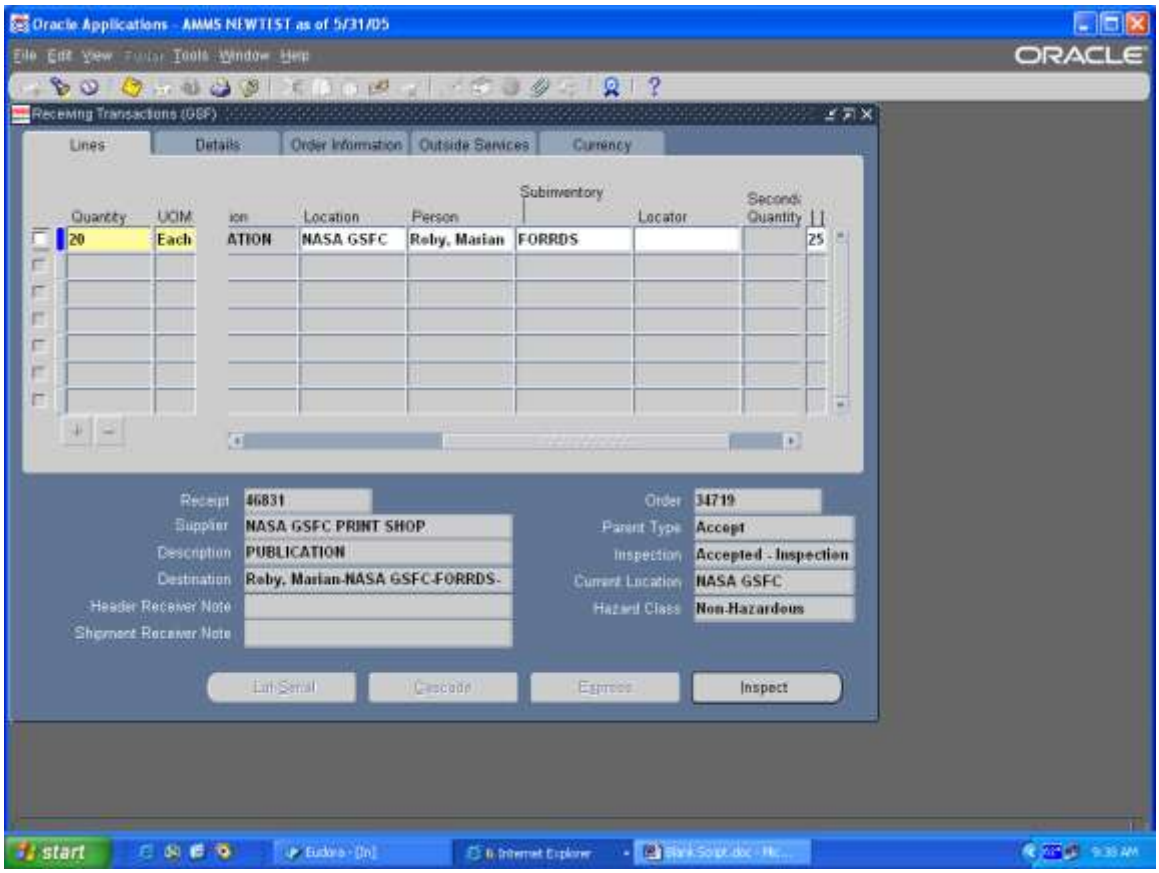
Step Description: The Purchase Order field should be populated with the PO number. Click on the Find button

Expected Results: Receiving Transactions window will appear



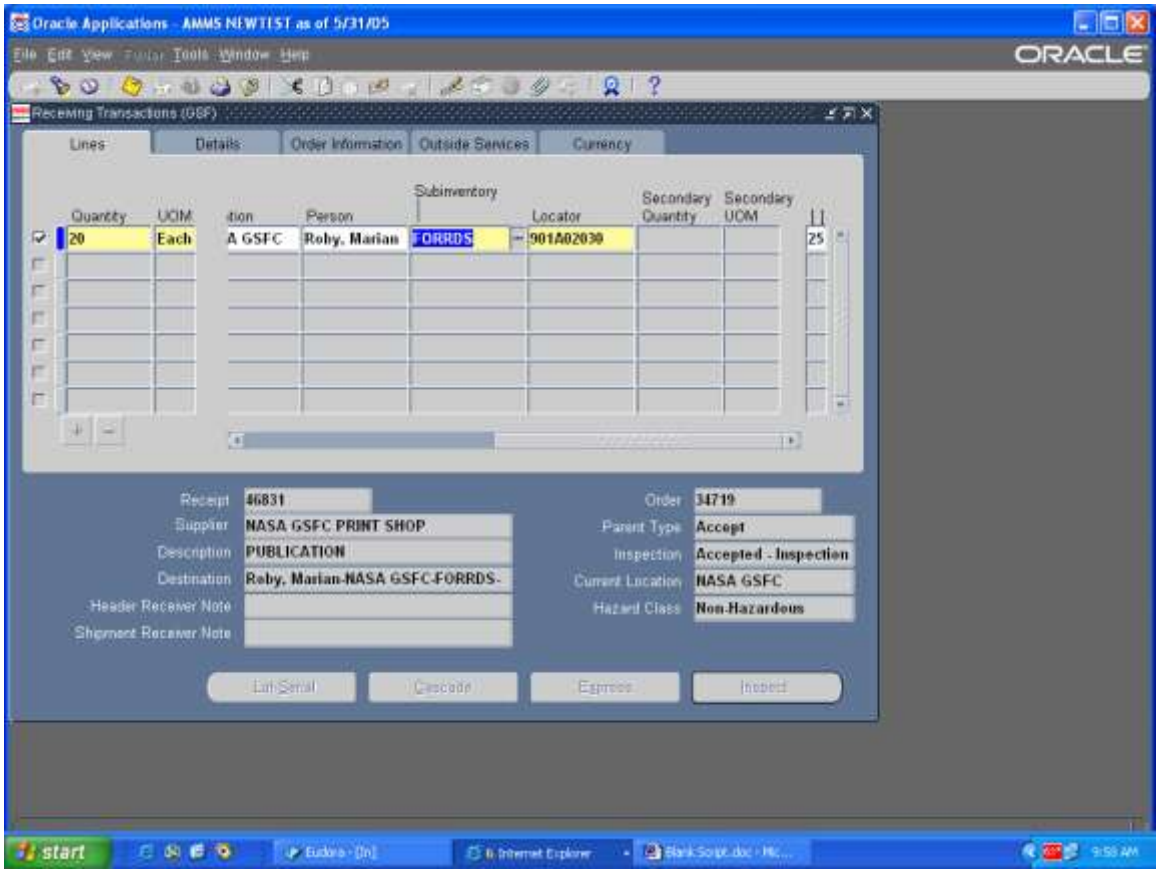
Step Description: Use the scroll bar move to the right until you see the Sub Inventory field, the Sub Inventory should already be populated, if not click on the List of Values (LOV) and select the appropriate Sub Inventory. NEVER DELIVER MATERIAL TO THE STAGING SUB INVENTORY.

Expected Results: Field will be populated



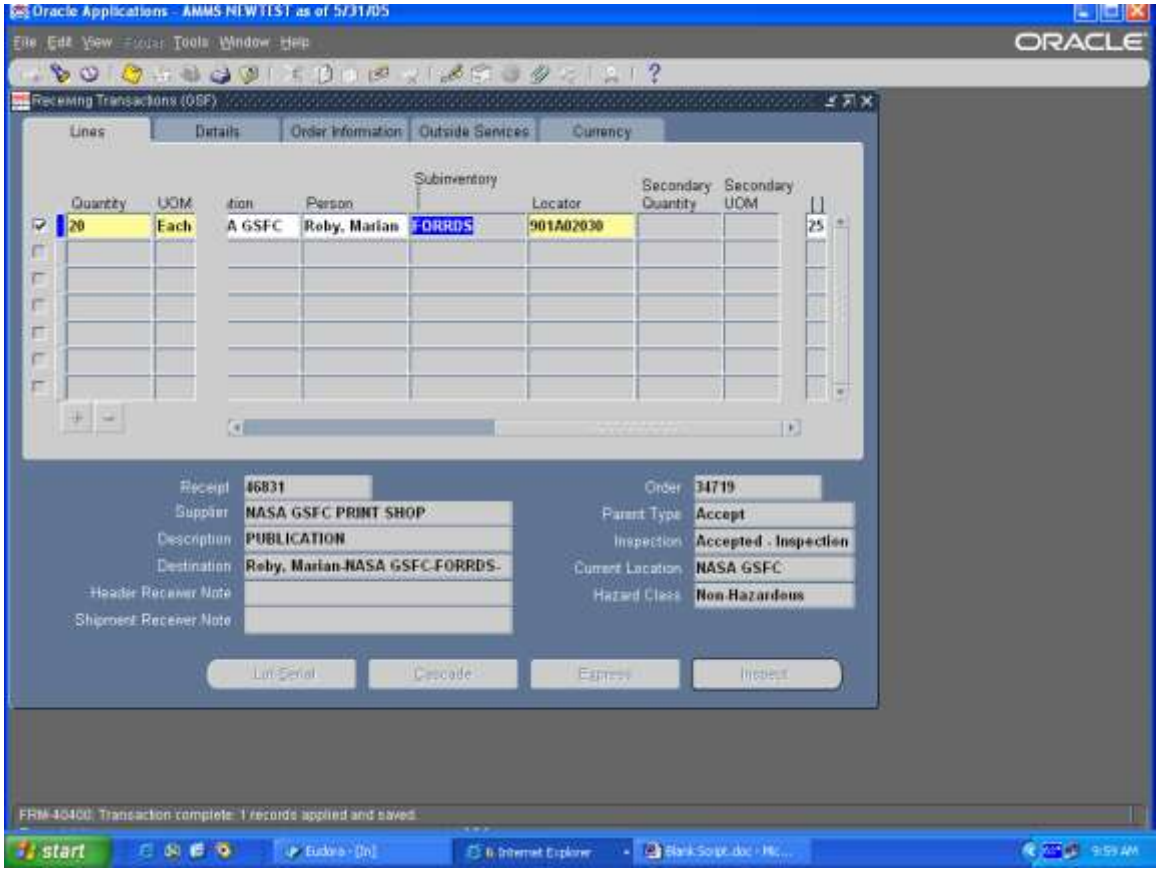
Step Description: Go to the Locator field, enter the locator that the material is physically located in.

Expected Results: Field will be populated



Step Description: Save your work

Expected Results: Transactions Saved and Applied message



Close all forms transactions complete

AMMS TRAINING SCRIPT

Deliver Material to Inventory

Purpose

The purpose of this training script is to explain how to deliver a purchase order to inventory, once the material has physically been put into location.

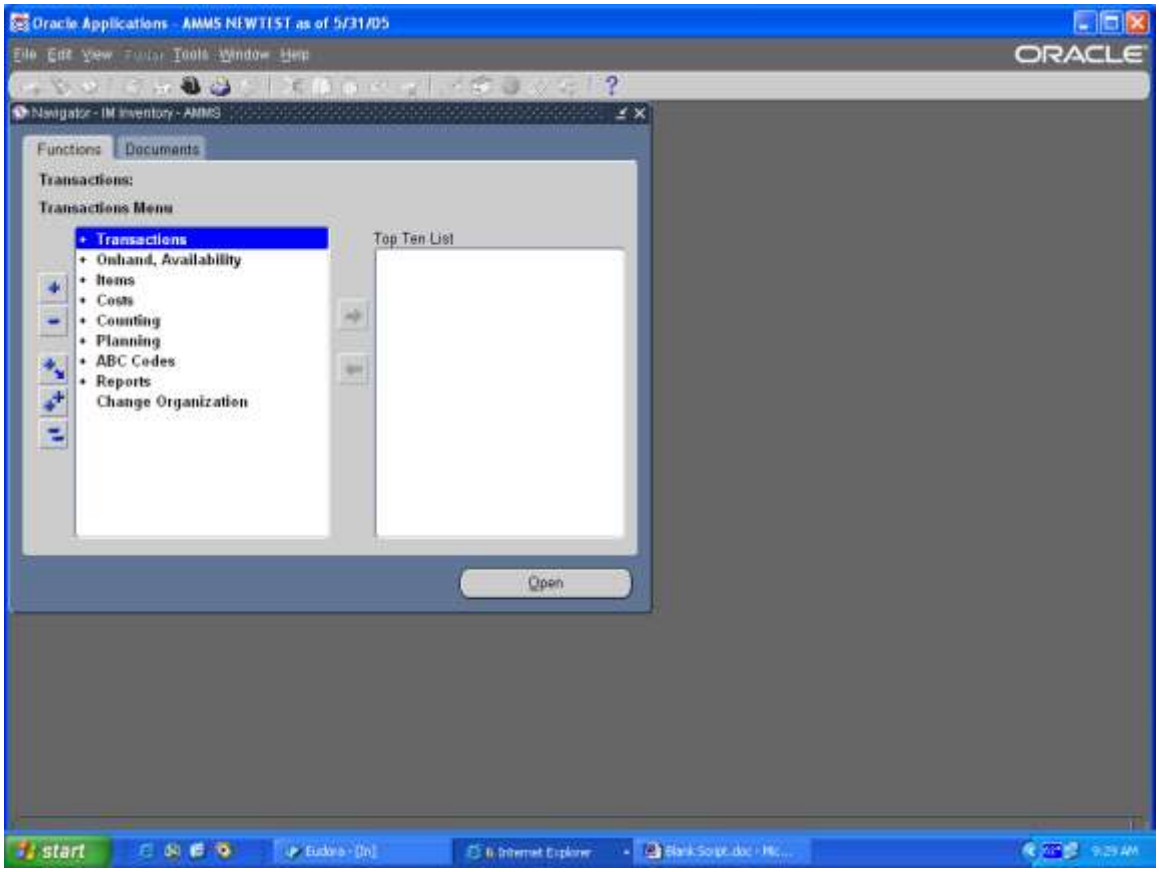
Audience

Warehousemen, Inspectors, Material Coordinators, and Supply Technician Team Leads

Prepared By	Theresa Coulson
Creation Date:	06/02/2005
Document Name	Deliver Material to Inventory.doc
Version	3
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Receiving.	

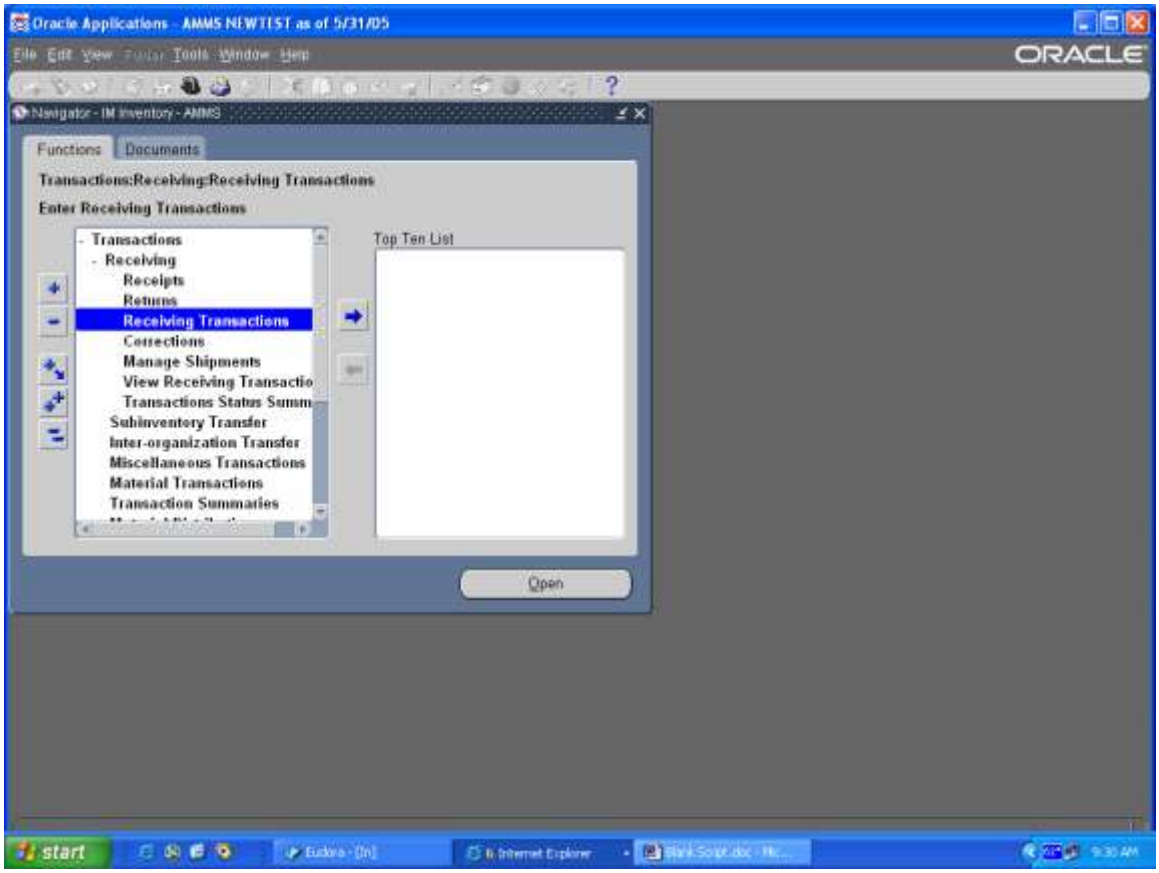
Step Description: Sign onto Oracle and select the IM Inventory AMMS responsibility

Expected Results: IM Inventory AMMS main menu will appear



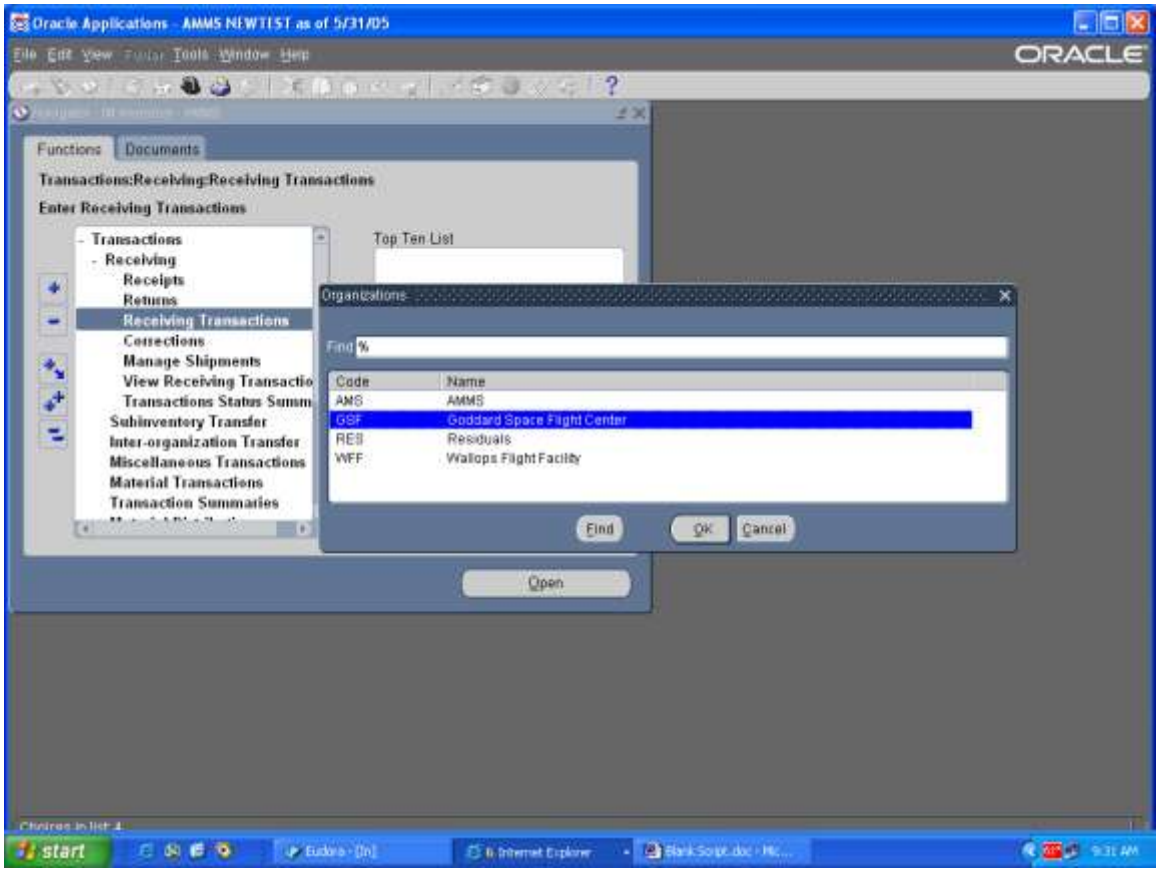
Step Description: From the IM Inventory AMMS main menu select Transactions> Receiving > Receiving Transactions, click on the Open button

Expected Results: Organization window will appear



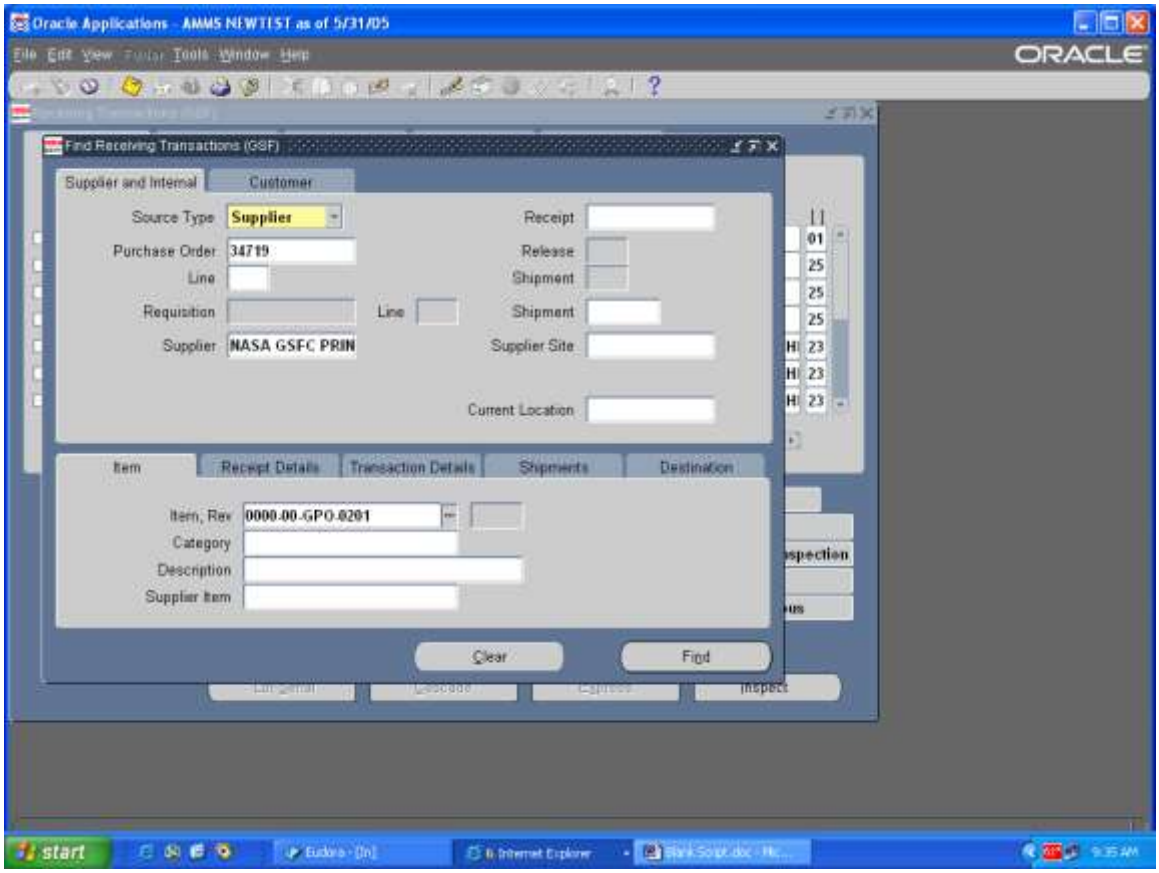
Step Description: From the Organization window select GSF click OK

Expected Results: Find Receiving Transactions window will appear



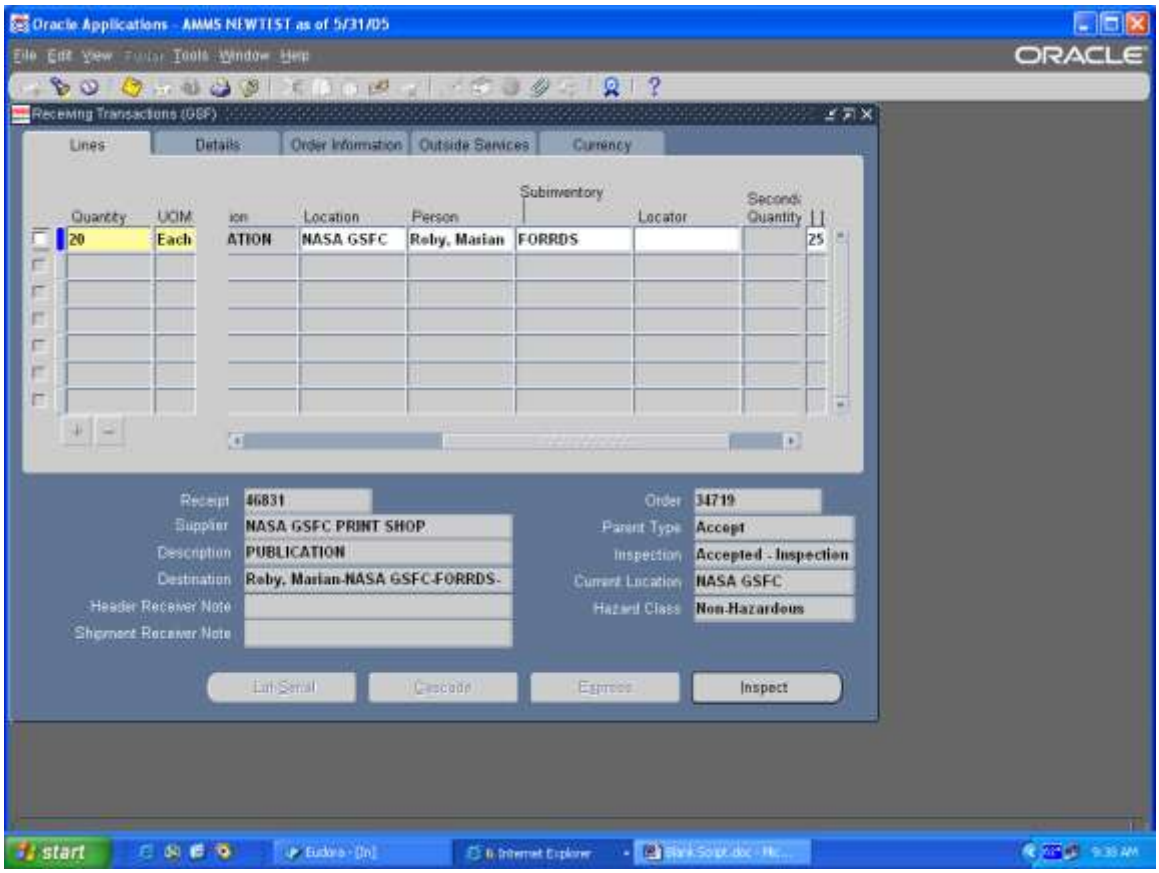
Step Description: In the Find Receiving Transactions window enter the Purchase Order number and the Item number, click on the Find button

Expected Results: Receiving Transactions window will appear



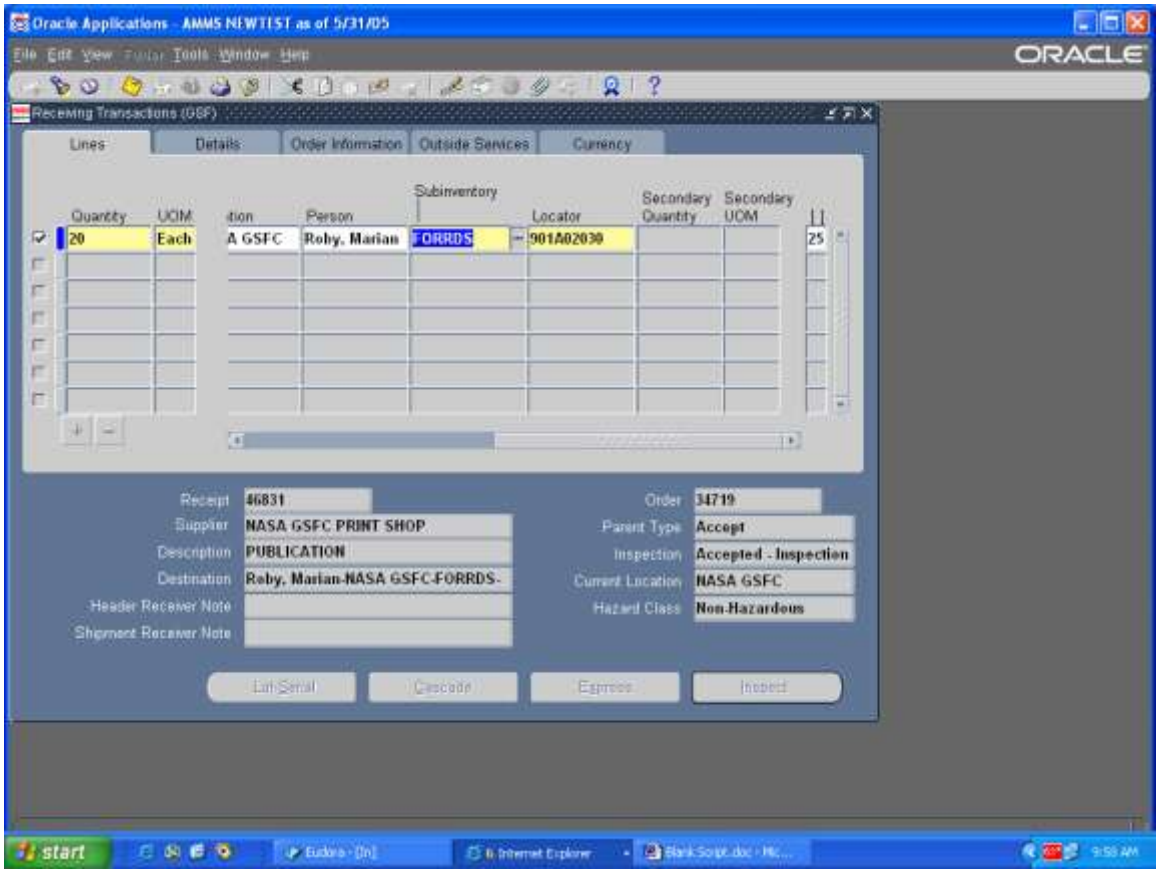
Step Description: Verify that this is the item that was put into location. **If all of the material went into one location** use the scroll bar move to the right until you see the Sub Inventory field, the Sub Inventory should already be populated, if not click on the List of Values (LOV) and select the appropriate Sub Inventory. NEVER DELIVER MATERIAL TO THE STAGING SUB INVENTORY.

Expected Results: Field will be populated



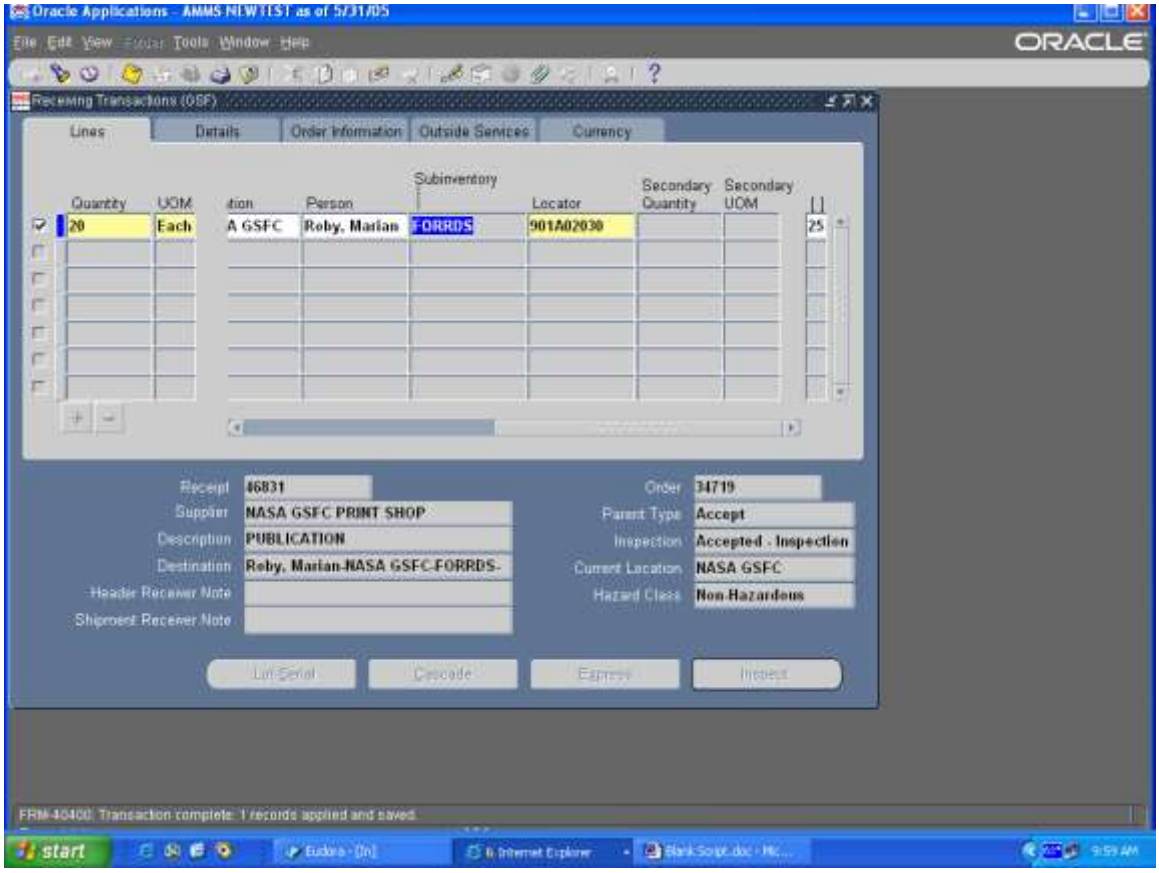
Step Description: Go to the Locator field enter the locator that the material is physically located in.

Expected Results: Field will be populated



Step Description: Save your work

Expected Results: Transactions Saved and Applied message



Close all forms transactions complete

AMMS TRAINING SCRIPT

Deliver Material to Inventory, Multiple Locators

Purpose

The purpose of this training script is to explain how to deliver a Bulk purchase order to inventory to multiple locators, once the material has physically been put into location.

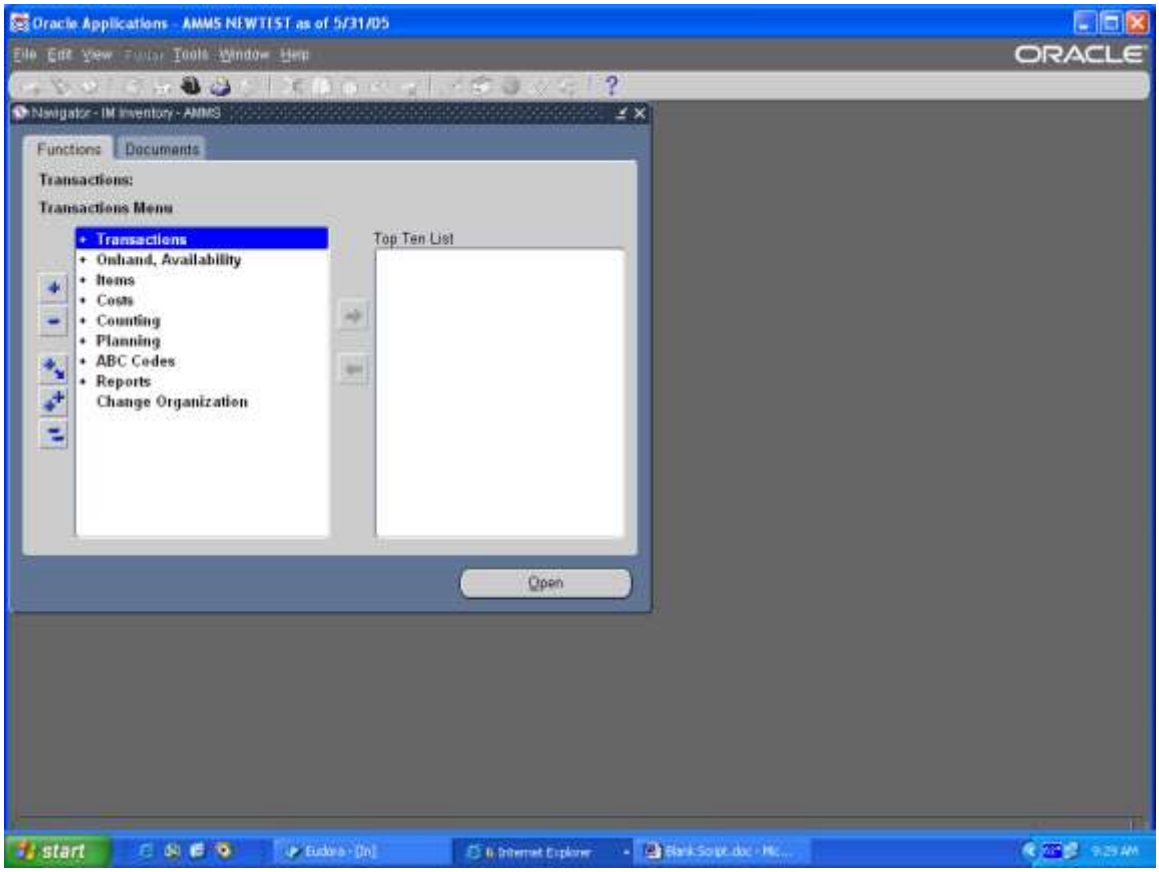
Audience

Warehousemen, Inspectors, Material Coordinators, and Supply Technician Team Leads

Prepared By	Theresa Coulson
Creation Date:	01/09/2006
Document Name	Deliver Material to Multiple Locators.doc
Version	2
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Receiving.	

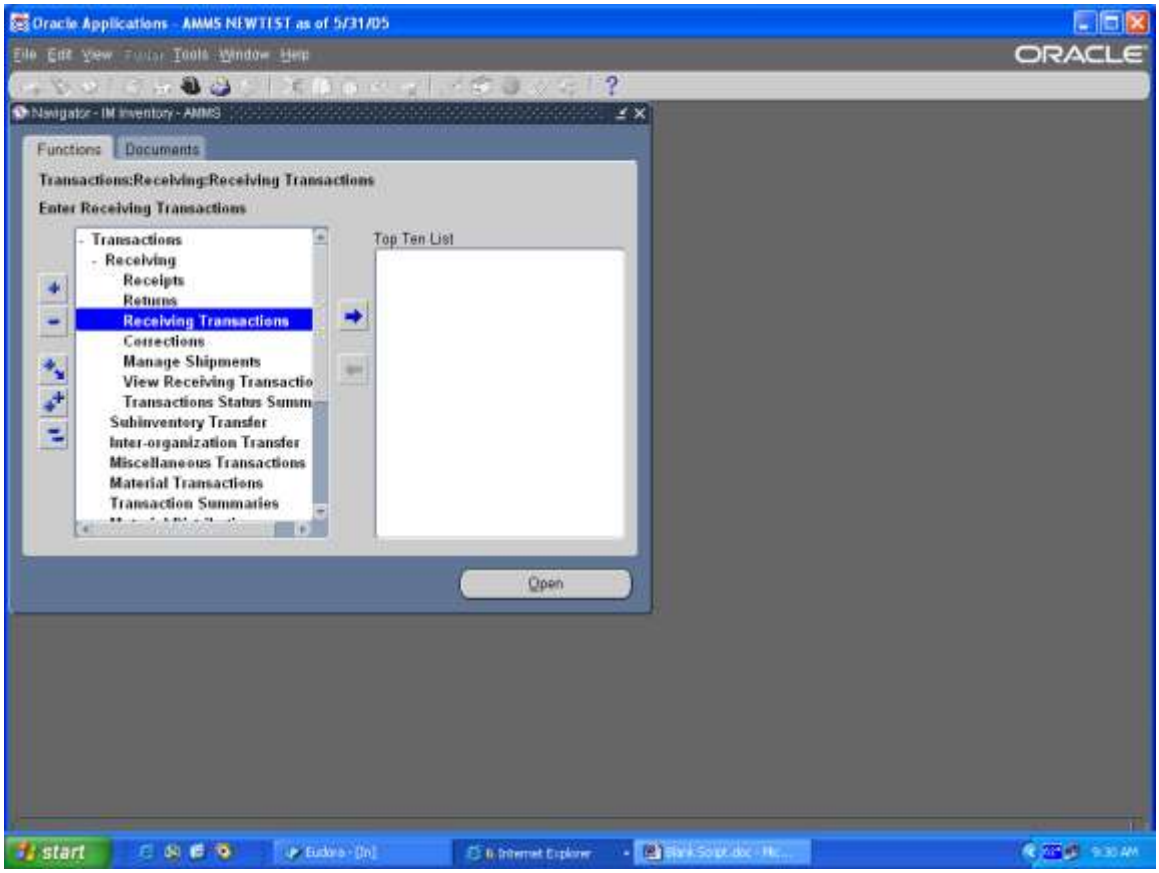
Step Description: Sign onto Oracle and select the IM Inventory AMMS responsibility

Expected Results: IM Inventory AMMS main menu will appear



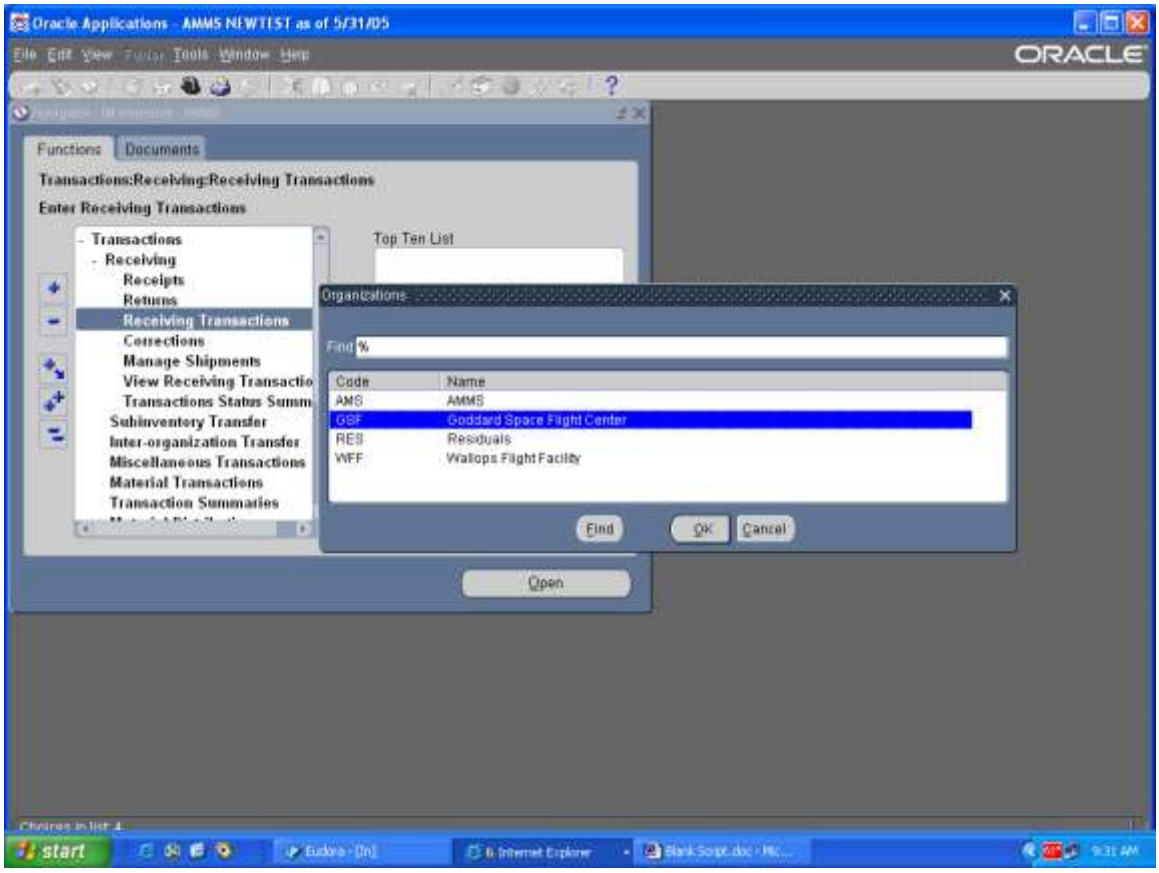
Step Description: From the IM Inventory AMMS main menu select Transactions> Receiving > Receiving Transactions, click on the Open button

Expected Results: Organization window will appear



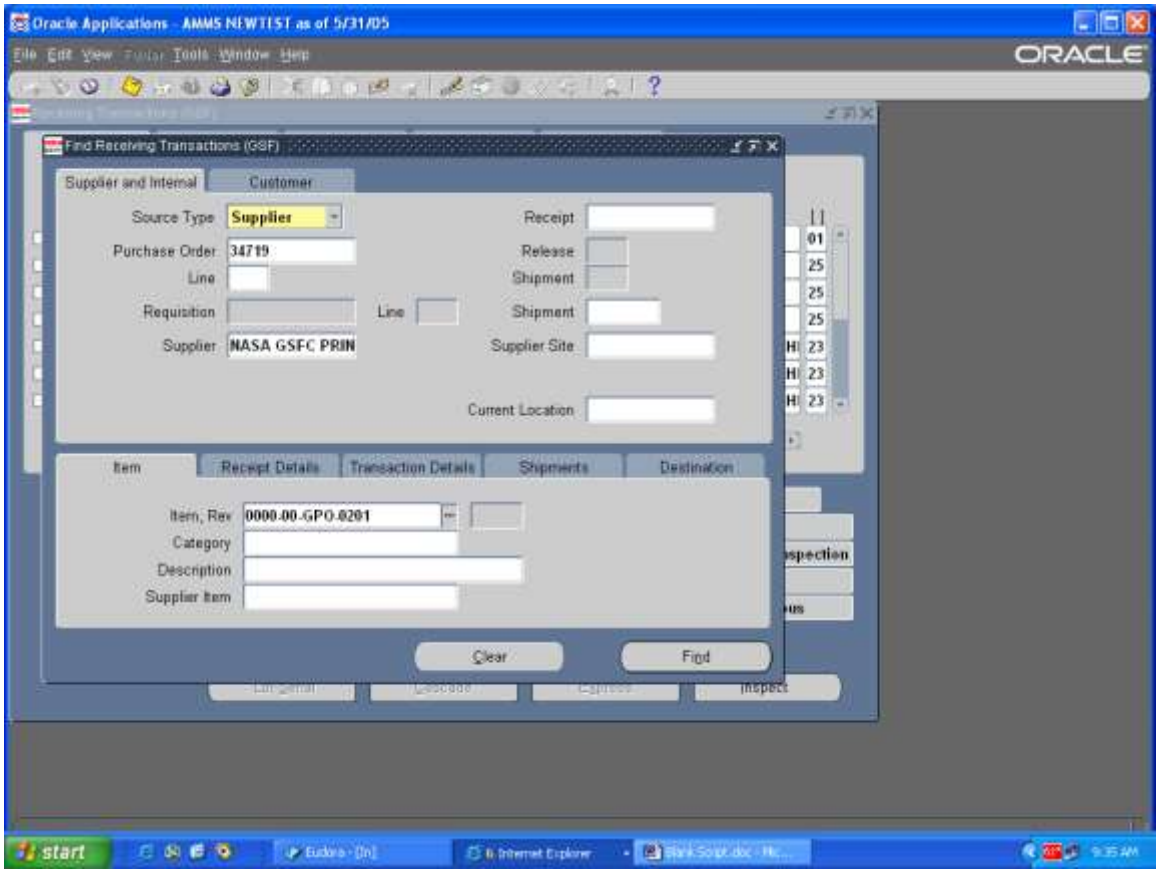
Step Description: From the Organization window select GSF click OK

Expected Results: Find Receiving Transactions window will appear



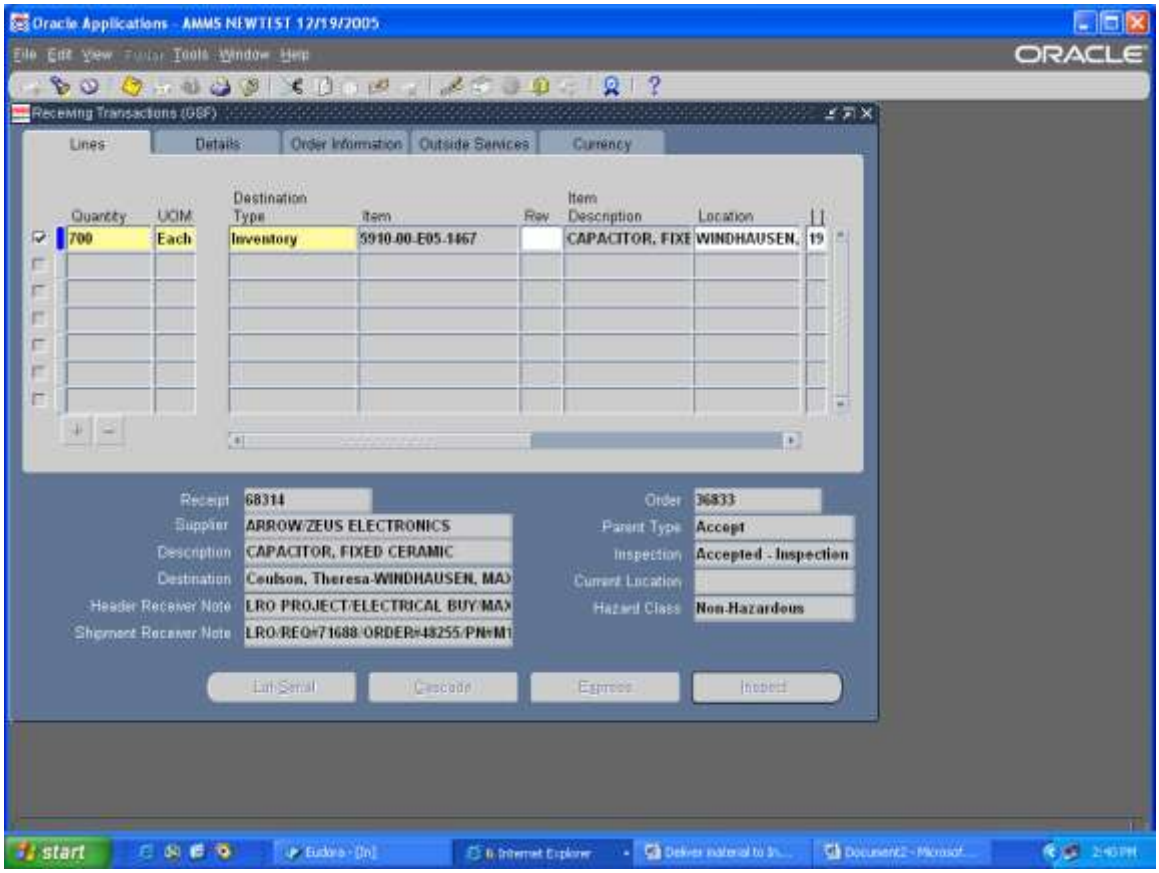
Step Description: In the Find Receiving Transactions window enter the Purchase Order number and the Item number, click on the Find button

Expected Results: Receiving Transactions window will appear



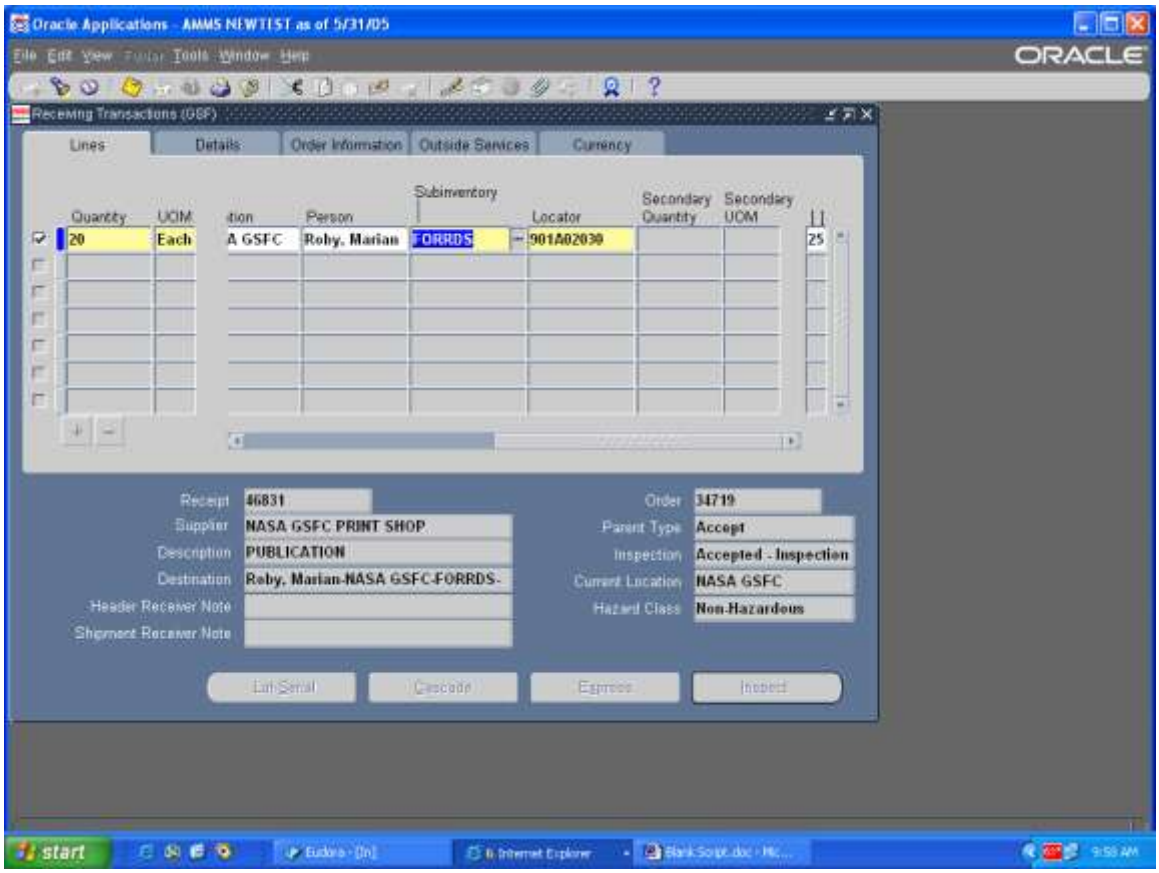
Step Description: Verify that this is the item that was put into location. If the material was put in to multiple locations, click in the Quantity field and change the qty that is being delivered, use the scroll bar move to the right until you see the Sub Inventory field, the Sub Inventory should already be populated, if not click on the List of Values (LOV) and select the appropriate Sub Inventory. NEVER DELIVER MATERIAL TO THE STAGING SUB INVENTORY.

Expected Results: Qty field will change and field will be populated



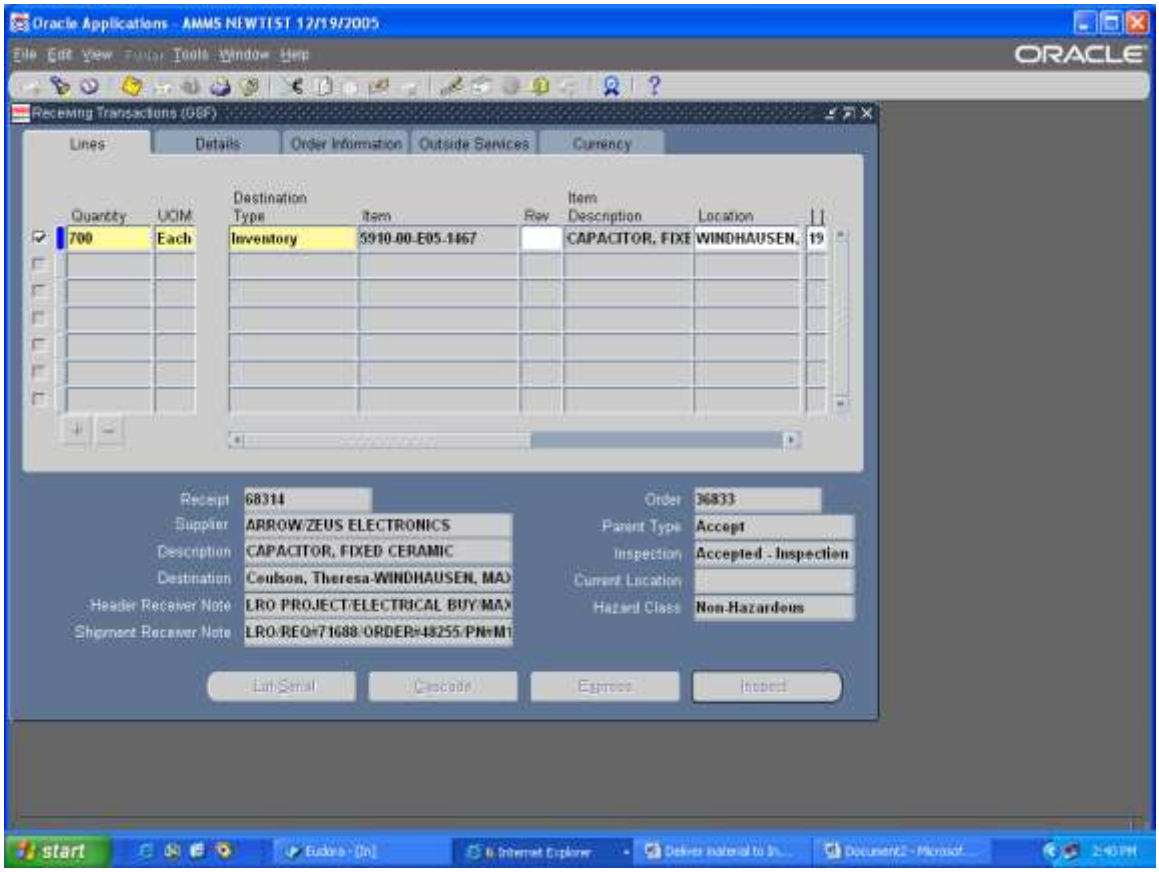
Step Description: Go to the Locator field enter the locator that the material is physically located in.

Expected Results: Field will be populated



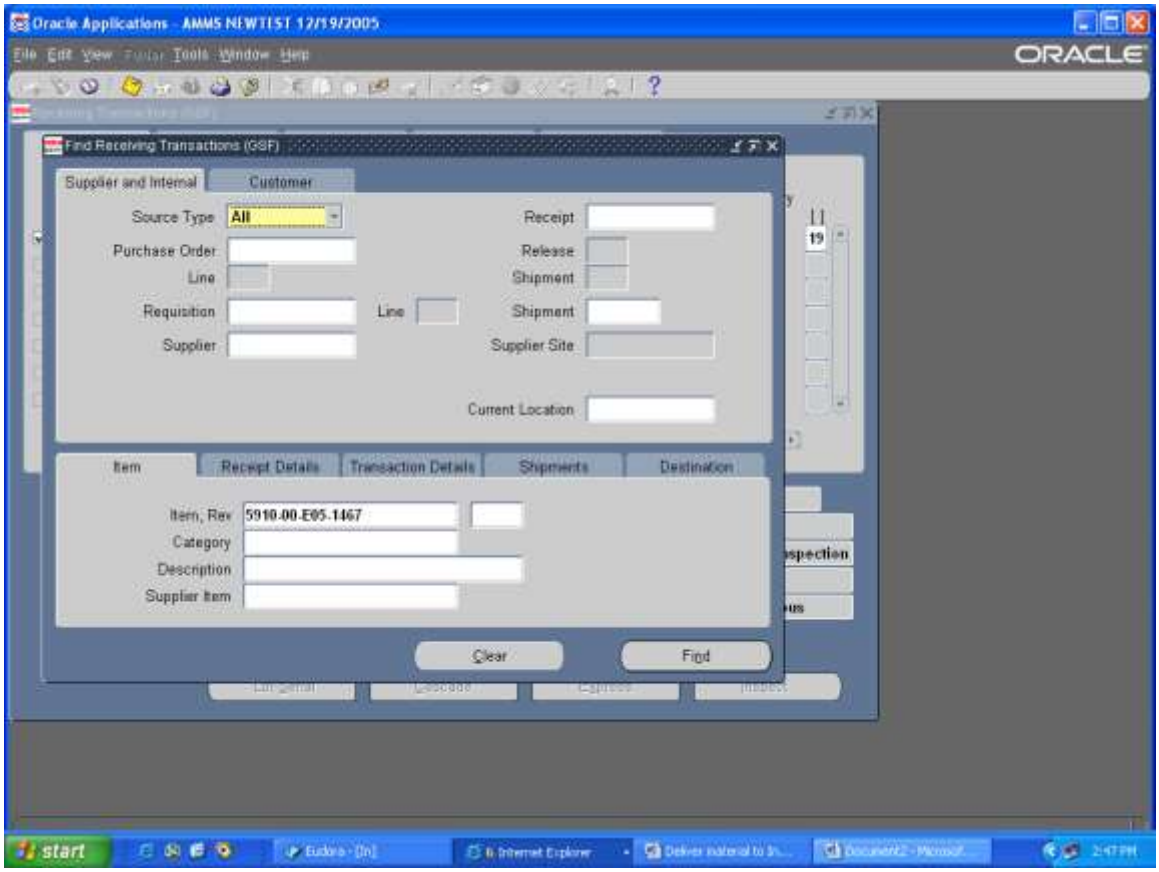
Step Description: From the Tool Bar select your flashlight to re-fresh your screen

Expected Results: Return to the Find Receiving Transactions window



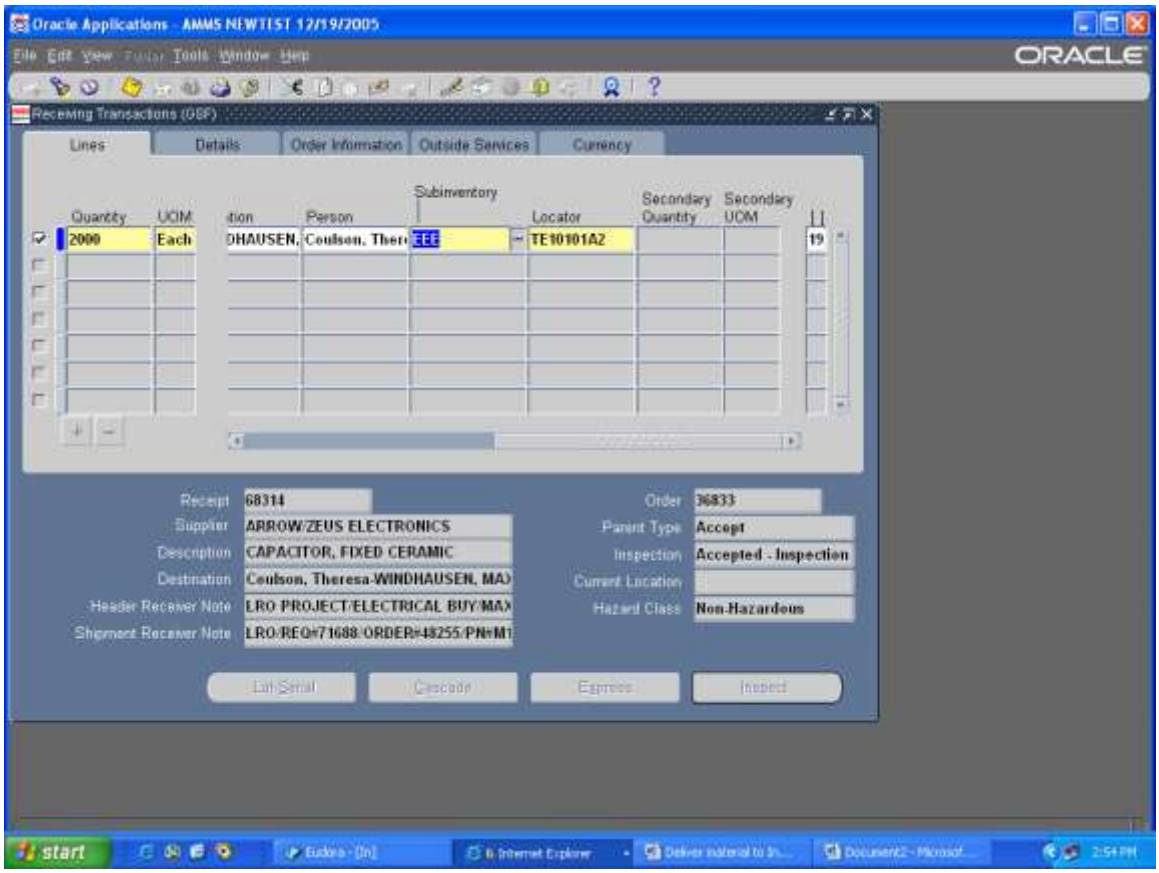
Step Description: Click on the Find button

Expected Results: Return to Receiving Transactions window



Step Description: Repeat steps, check quantity if needed, scroll over to Sub Inventory, enter if necessary, move to Locator field, enter locator. Repeat all steps the full quantity has been delivered to inventory.

Expected Results: Transactions Saved and applied



AMMS TRAINING SCRIPT

Deliver Shelf Life Material To Inventory

Purpose

The purpose of this training script is to demonstrate how to deliver material to inventory that is shelf life (lot controlled).

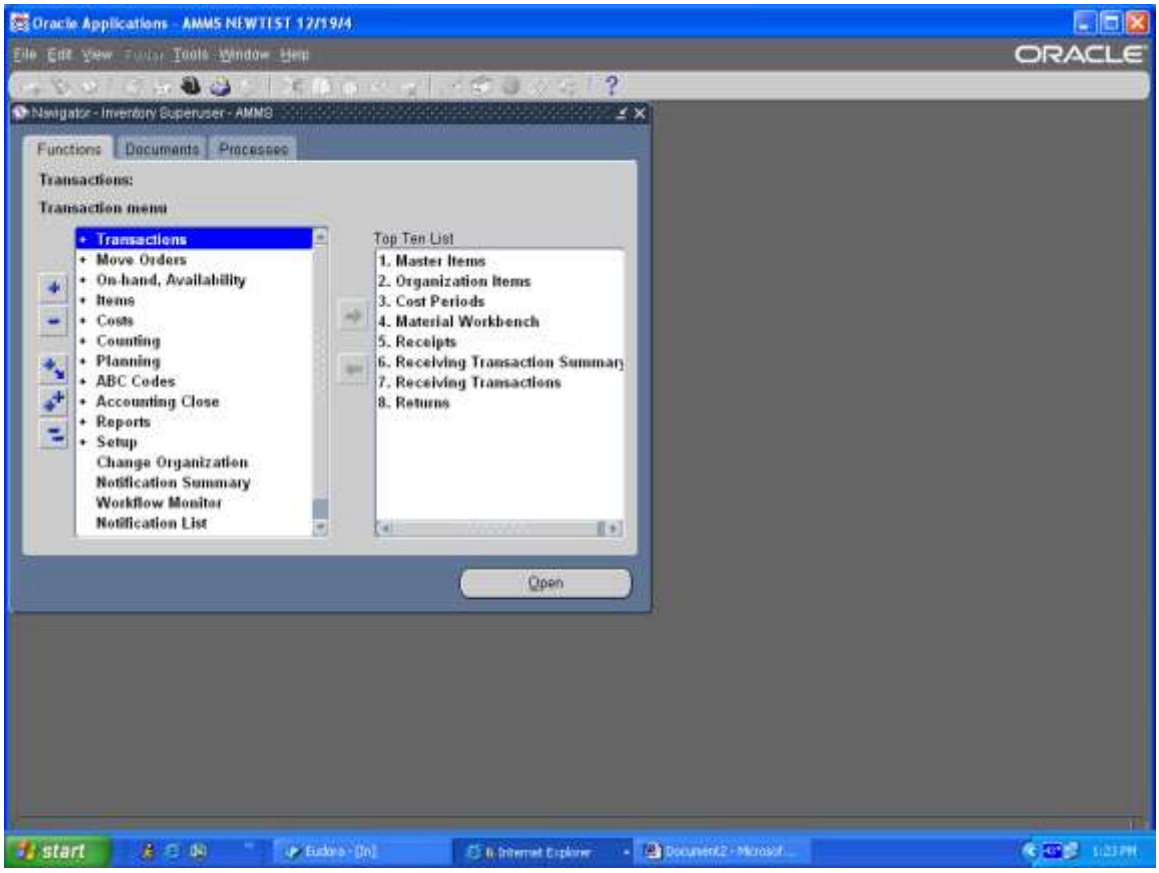
Audience

Warehousemen, Inspectors, Material Coordinators, and Team Leads

Prepared By	Theresa Coulson
Creation Date:	02/10/2005
Document Name	Deliver Shelf Life Material to Inventory.doc
Version	3
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Receiving.	

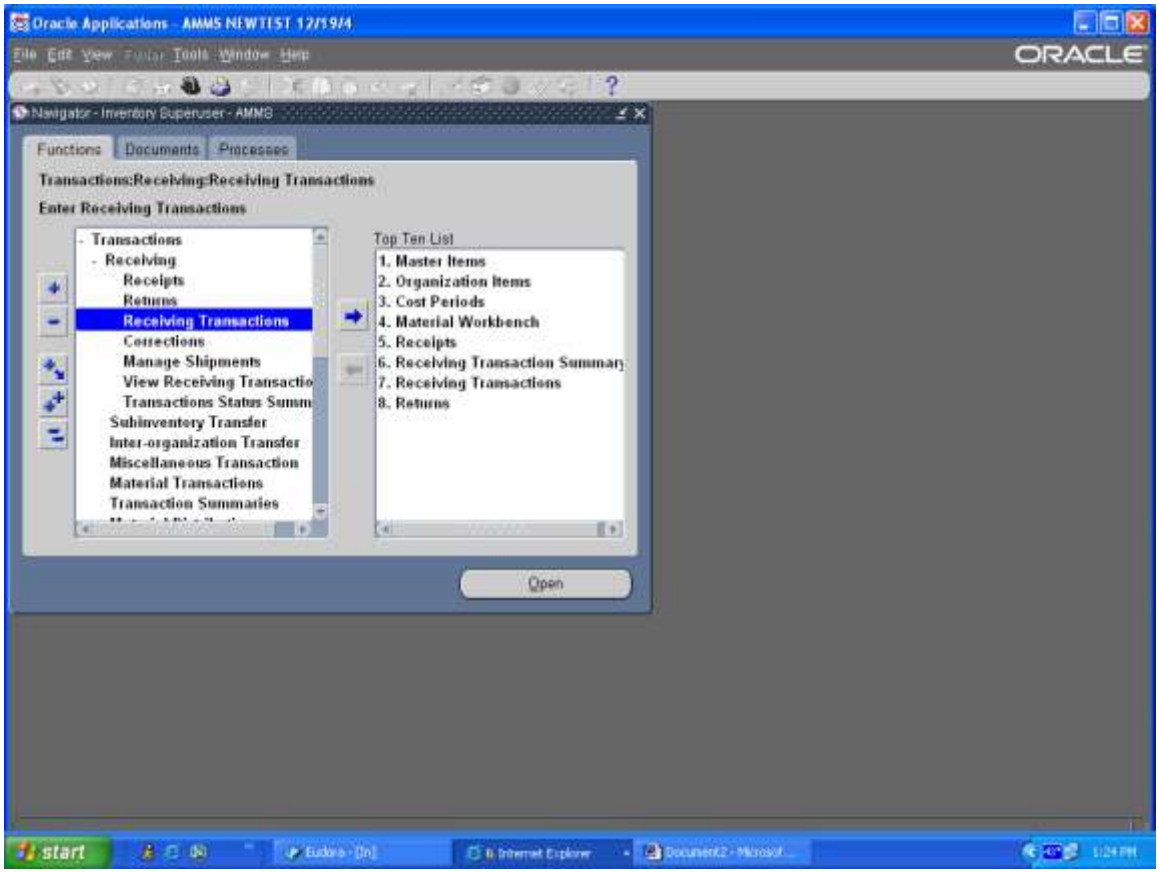
Step Description: Sign onto Oracle and select your Inventory responsibility.

Expected Results: Inventory Main Menu will appear



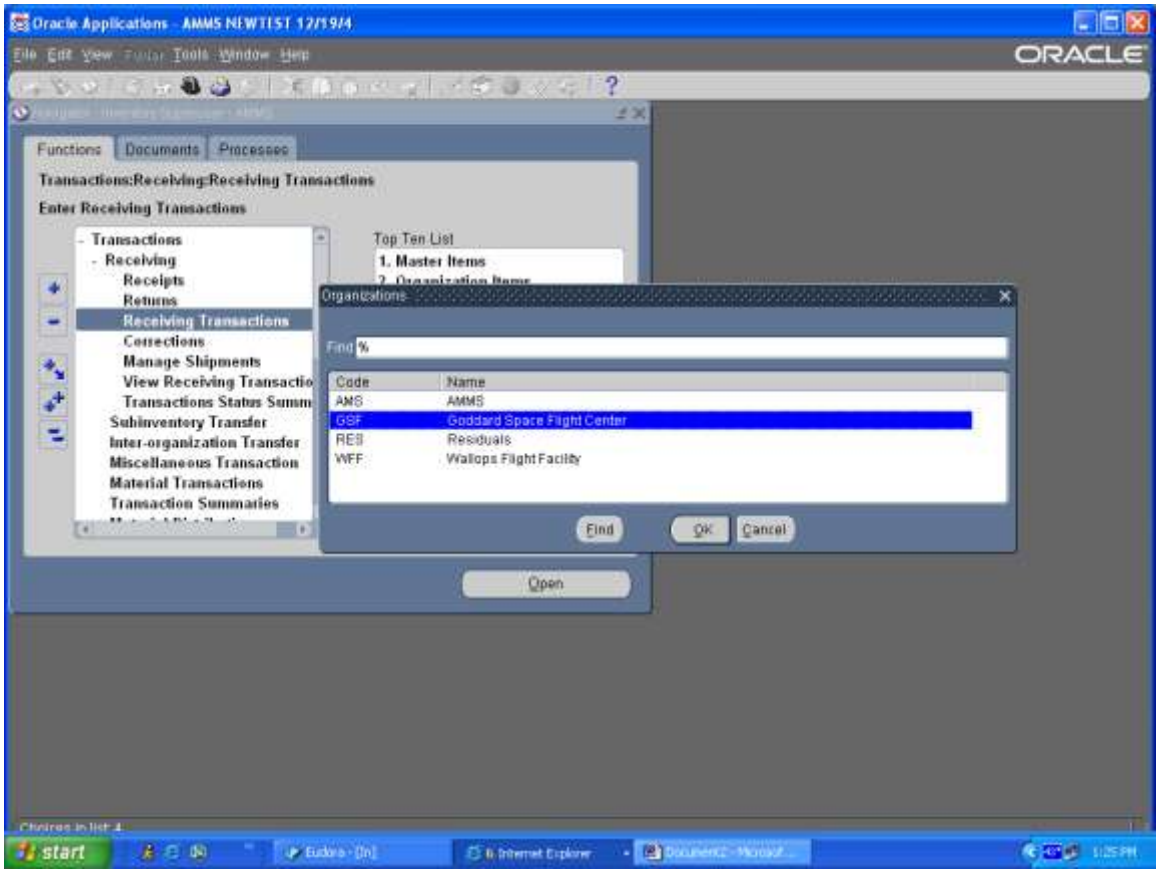
Step Description: From the Inventory main menu select Transactions>Receiving > Receiving Transactions

Expected Results: Organization window will appear



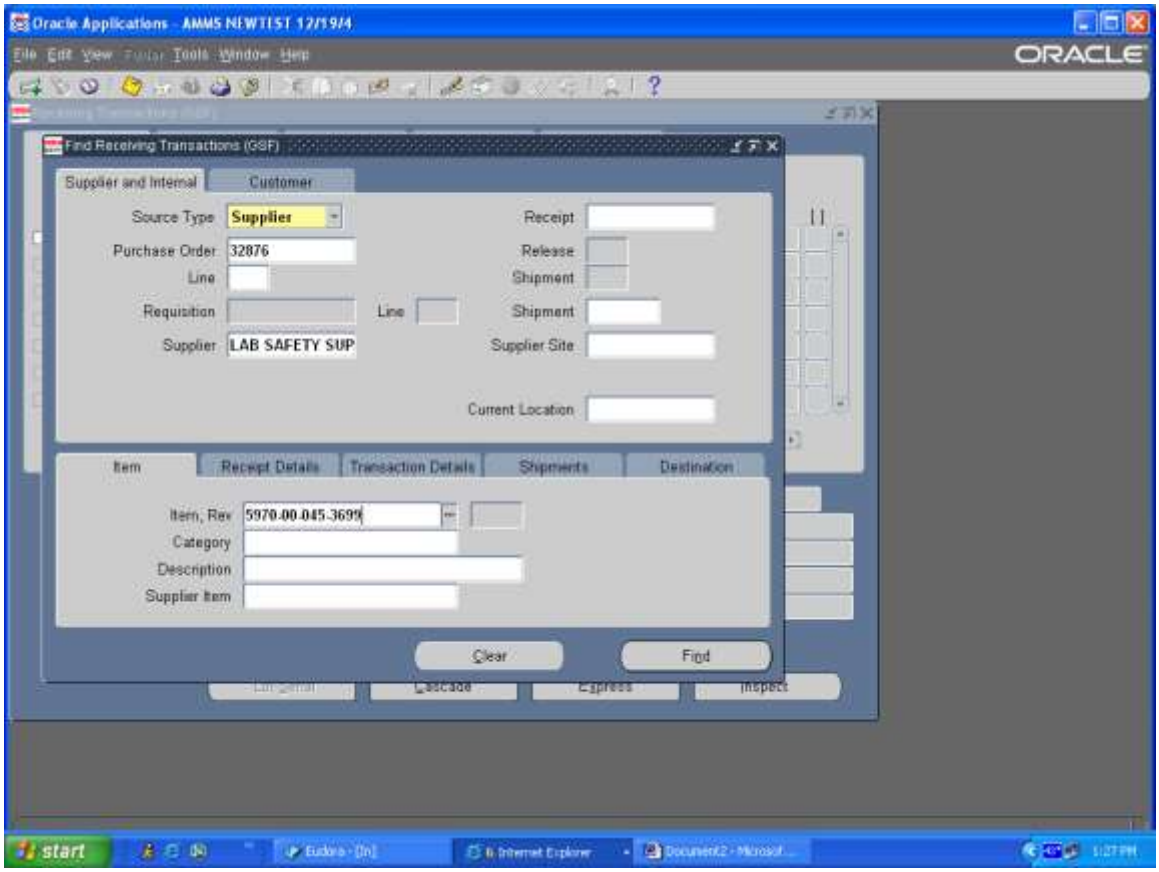
Step Description: Select the appropriate organization, GSF for Goddard or WFF for Wallops.

Expected Results: Find Receiving Transactions window will appear



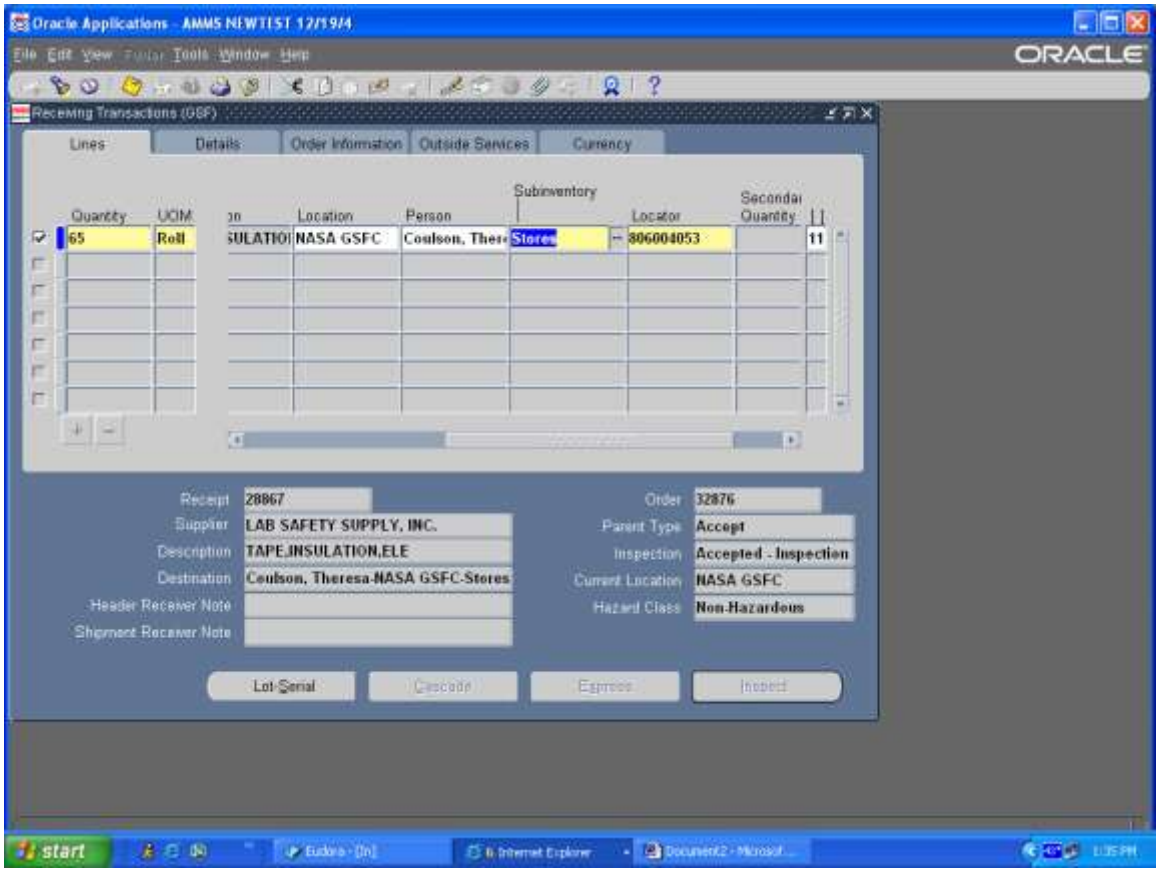
Step Description: In the Purchase Order field enter the PO that is being delivered to inventory. You can also enter the item number in the Item,Rev field at the bottom of the screen. Click on the Find button

Expected Results: Fields will be populated and you will the Receiving Transactions will appear.



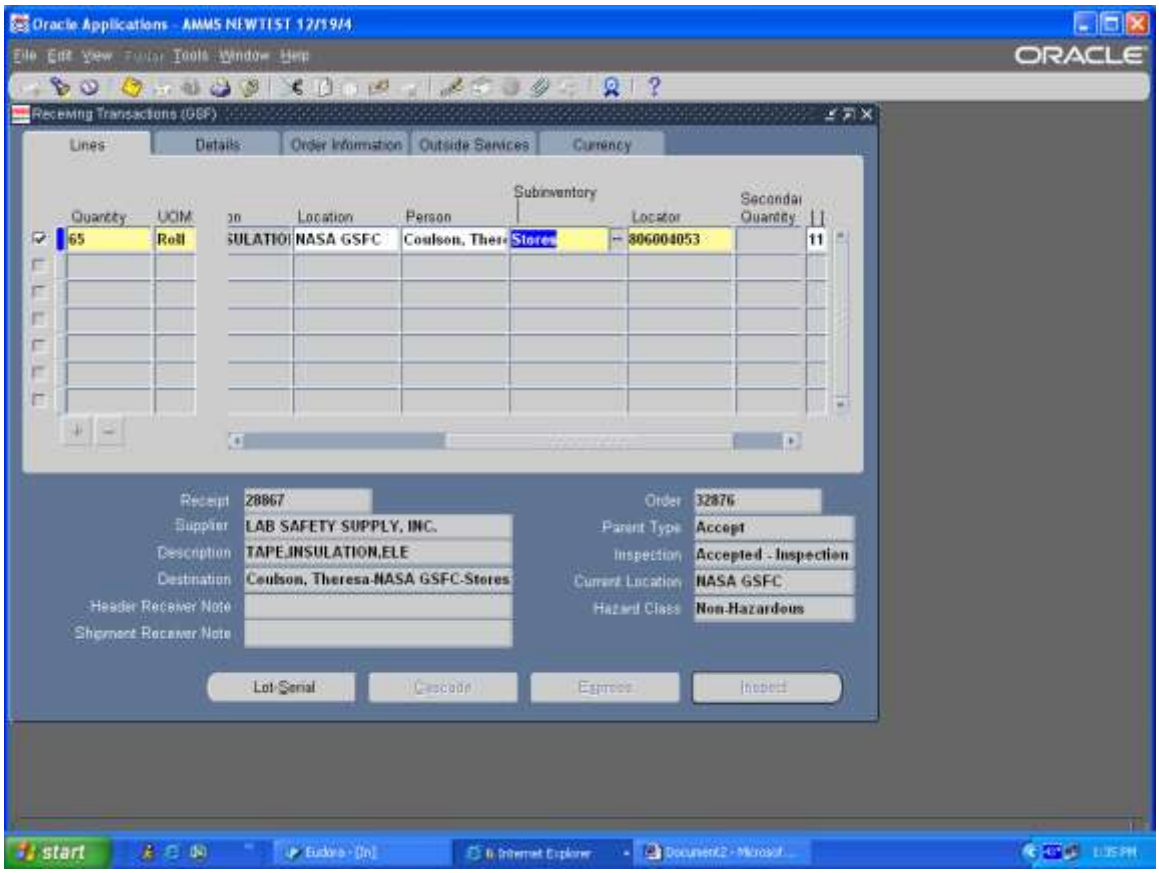
Step Description: Click in the box to select the line, a check mark will appear. Tab to the Subinventory field, if the field is not populated click on the List of Values and select the appropriate Subinventory. Tab to the Locator field and enter the location the material will be in the warehouse.

Expected Results: Field will be populated.



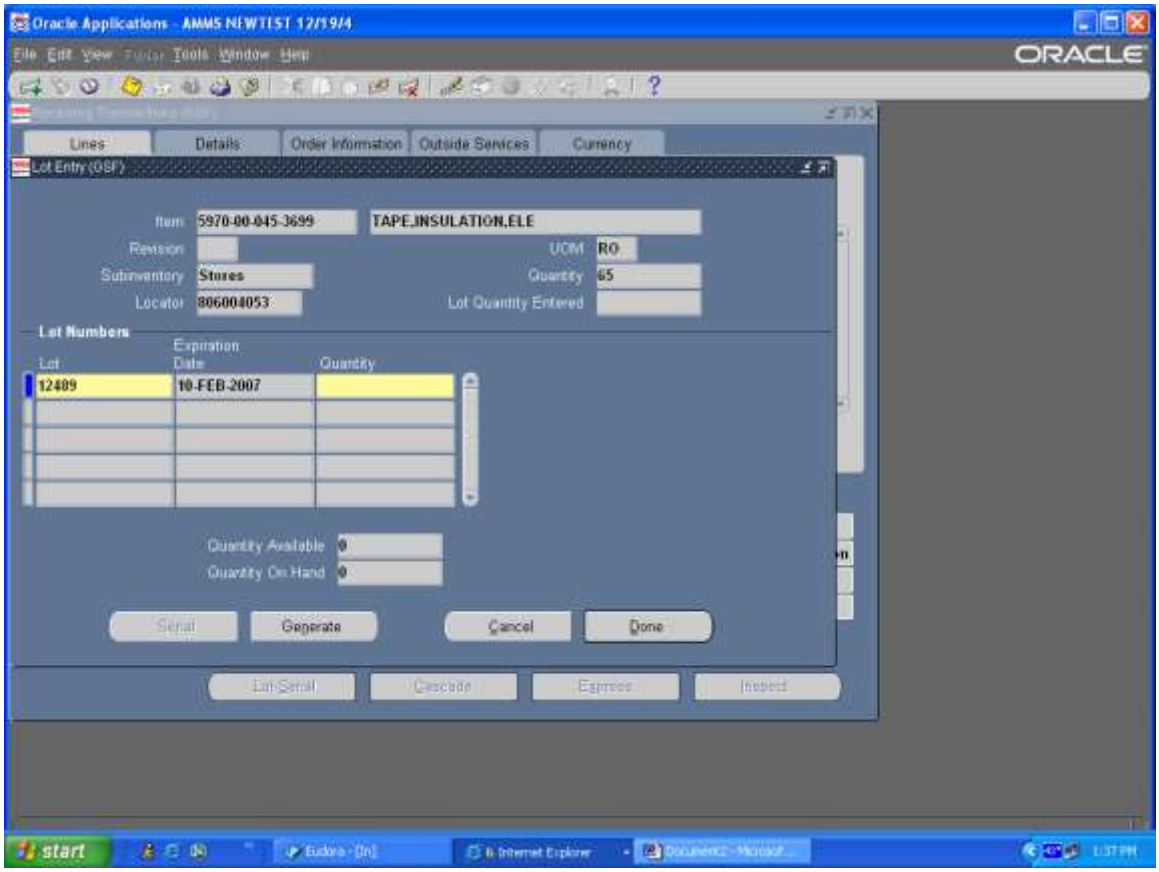
Step Description: Click on the Lot-Seriel button at the bottom of the screen.

Expected Results: Lot Entry window will appear.



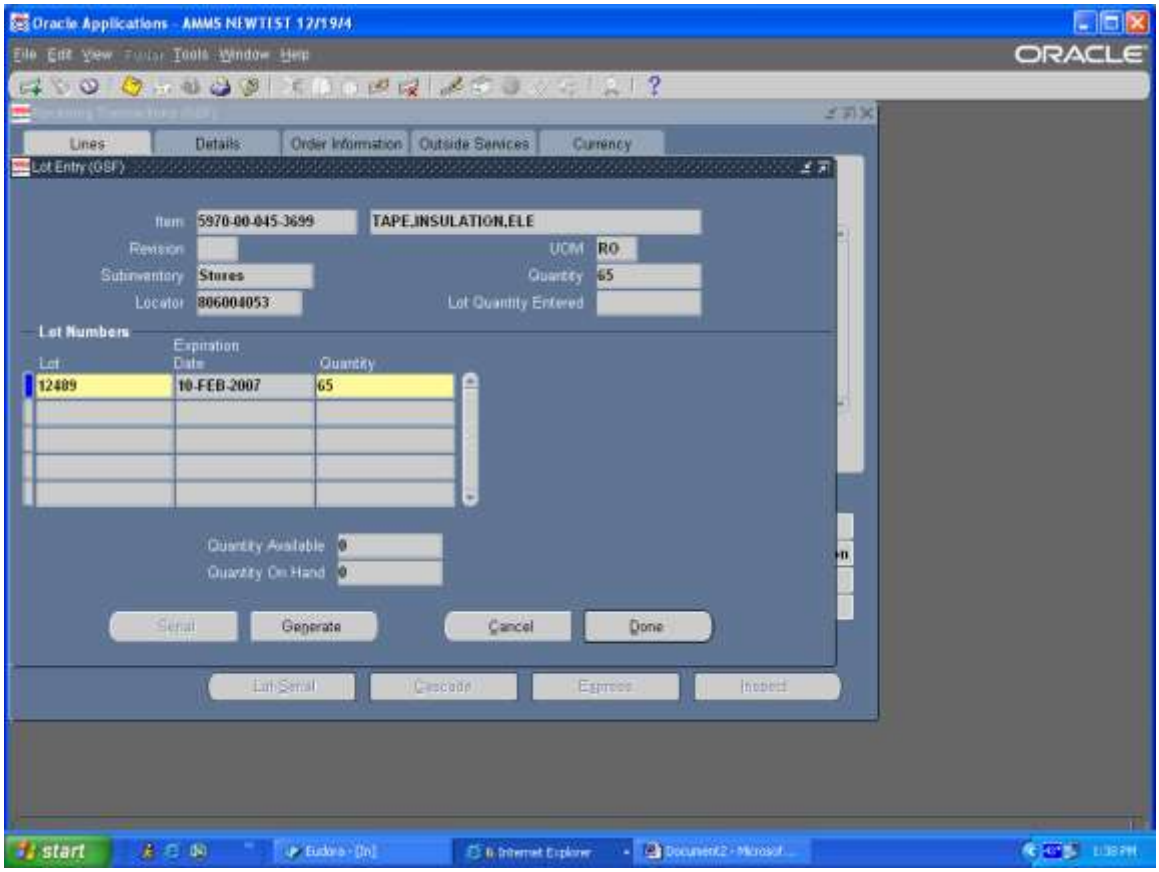
Step Description: Place the curser in the Lot field and click on the Generate button, this will assign an Oracle Lot number to this item.

Expected Results: Lot number and expiration date will appear.



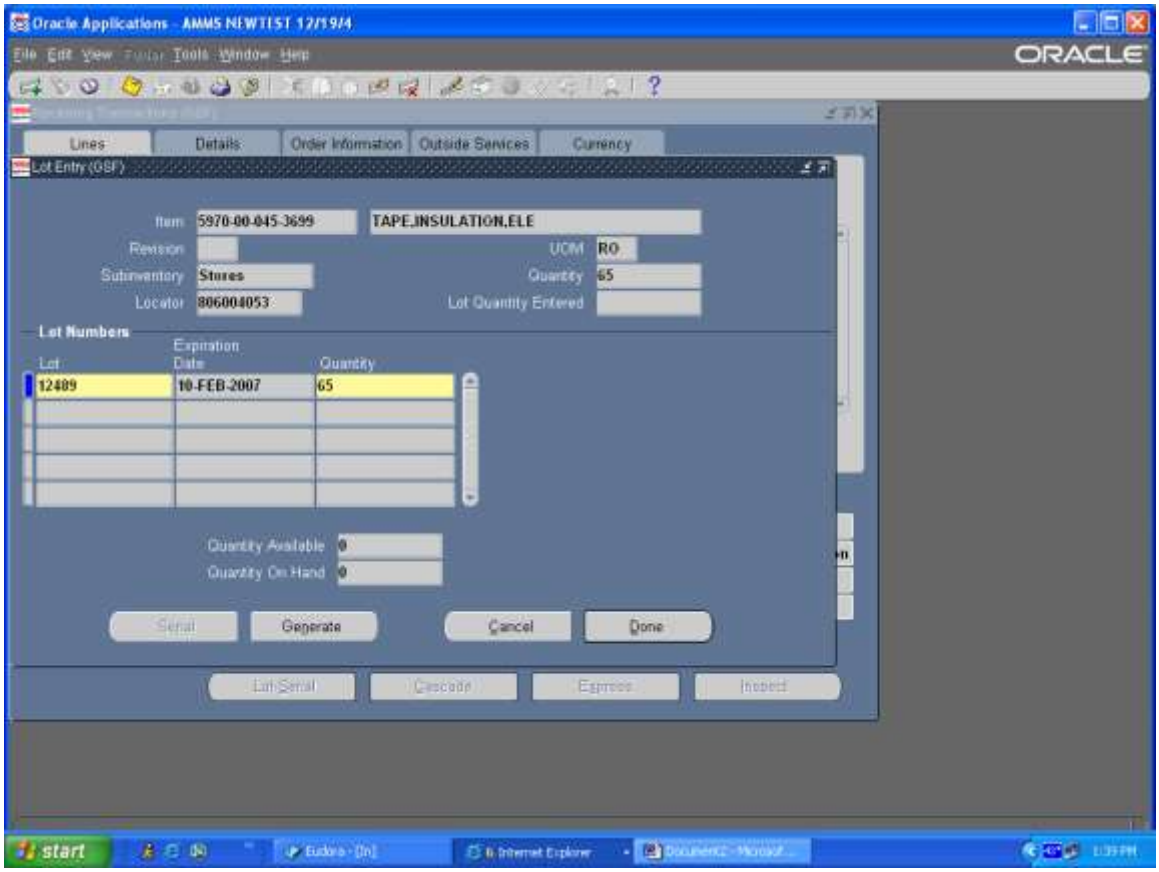
Step Description: Place the curser in the Quantity field, enter the quantity that is being delivered.

Expected Results: Fields will be populated.



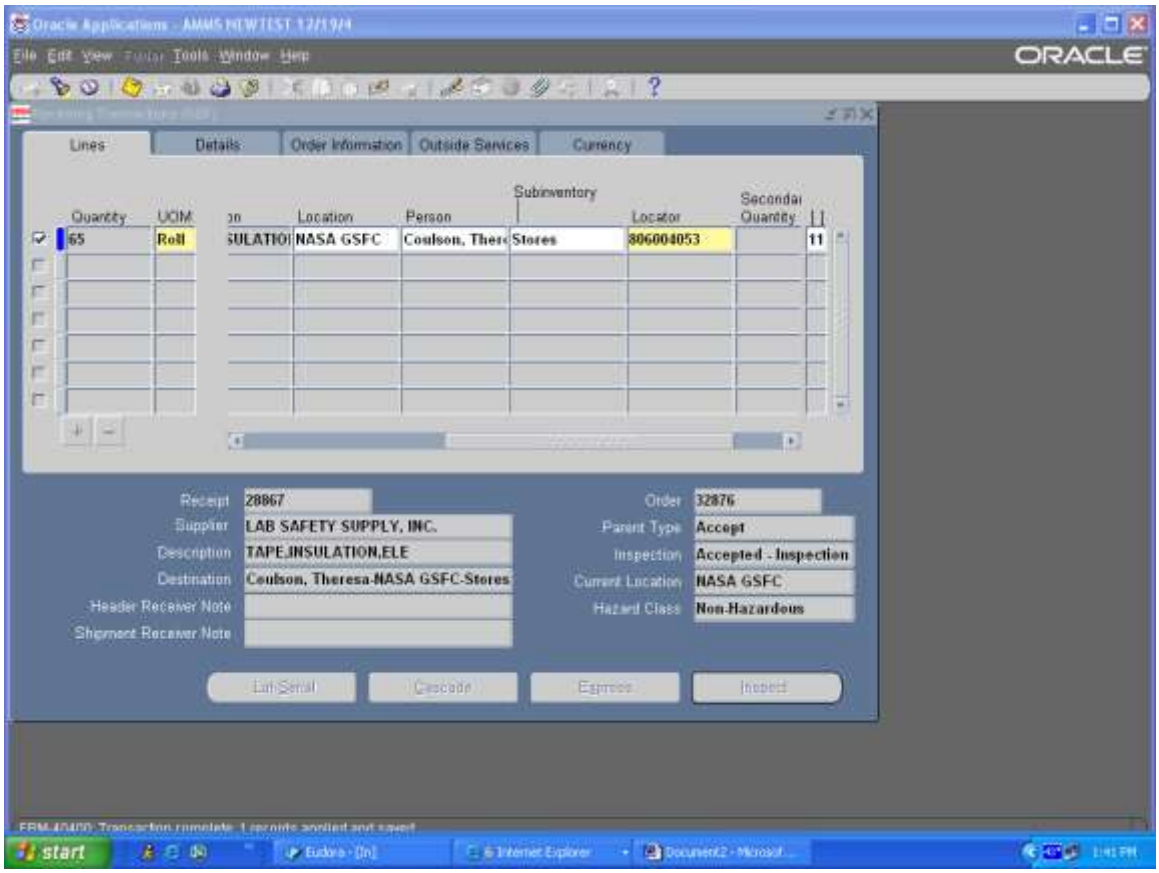
Step Description: After you have generated the Lot and entered the Qty, write the lot number on your paperwork and click on the Done button

Expected Results: You will return to the Receiving Transactions window.



Step Description: Save your work.

Expected Results: Transactions Saved and Applied message.



Note: You have just completed delivering a Shelf Life item to inventory. Please make sure to take note of the lot number that Oracle generated and place it on the material.

AMMS TRAINING SCRIPT
Process Direct Receipt

Purpose

The purpose of this training script is to provide detailed instructions on how to process a Direct Receipt.

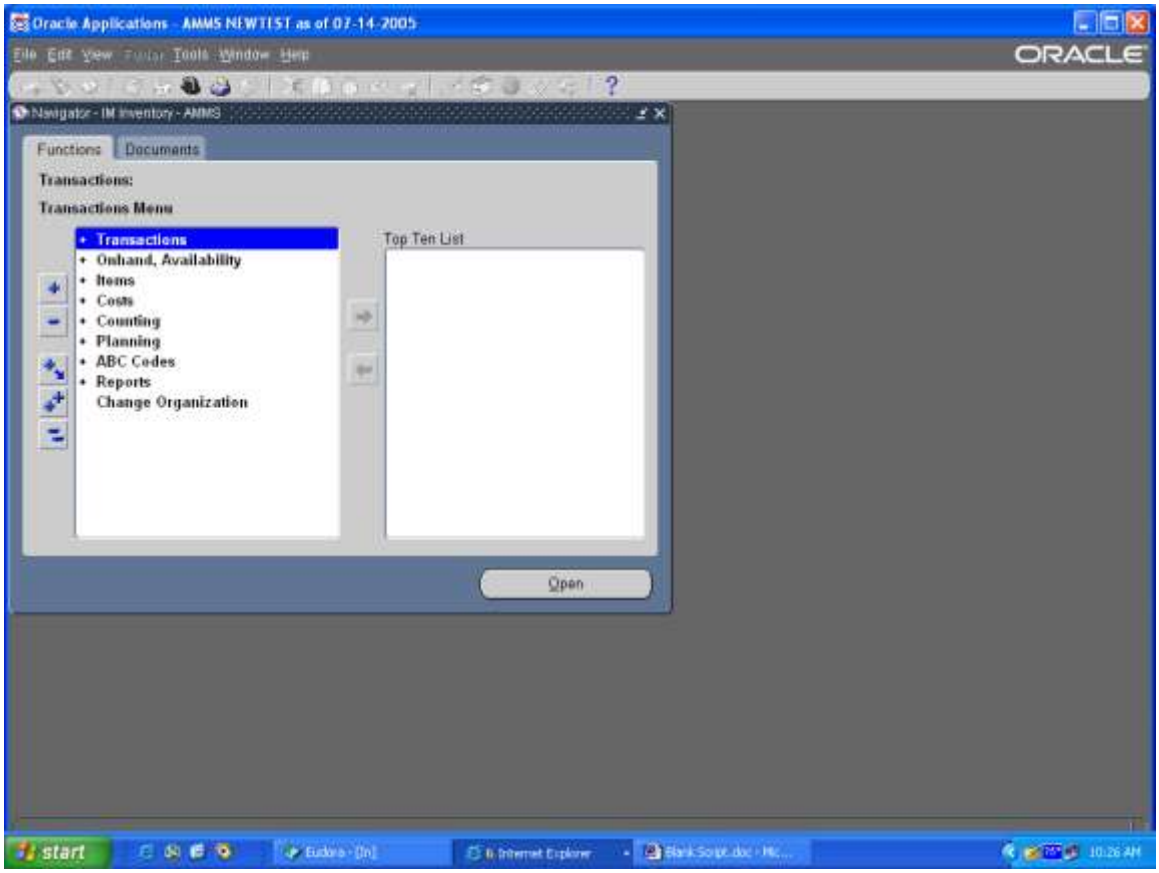
Audience

Inspectors, Material Coordinators, and Supply Technicians

Prepared By	Theresa Coulson
Creation Date:	08/19/2005
Document Name	Process Direct Receipt.doc
Version	3
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Receiving.	

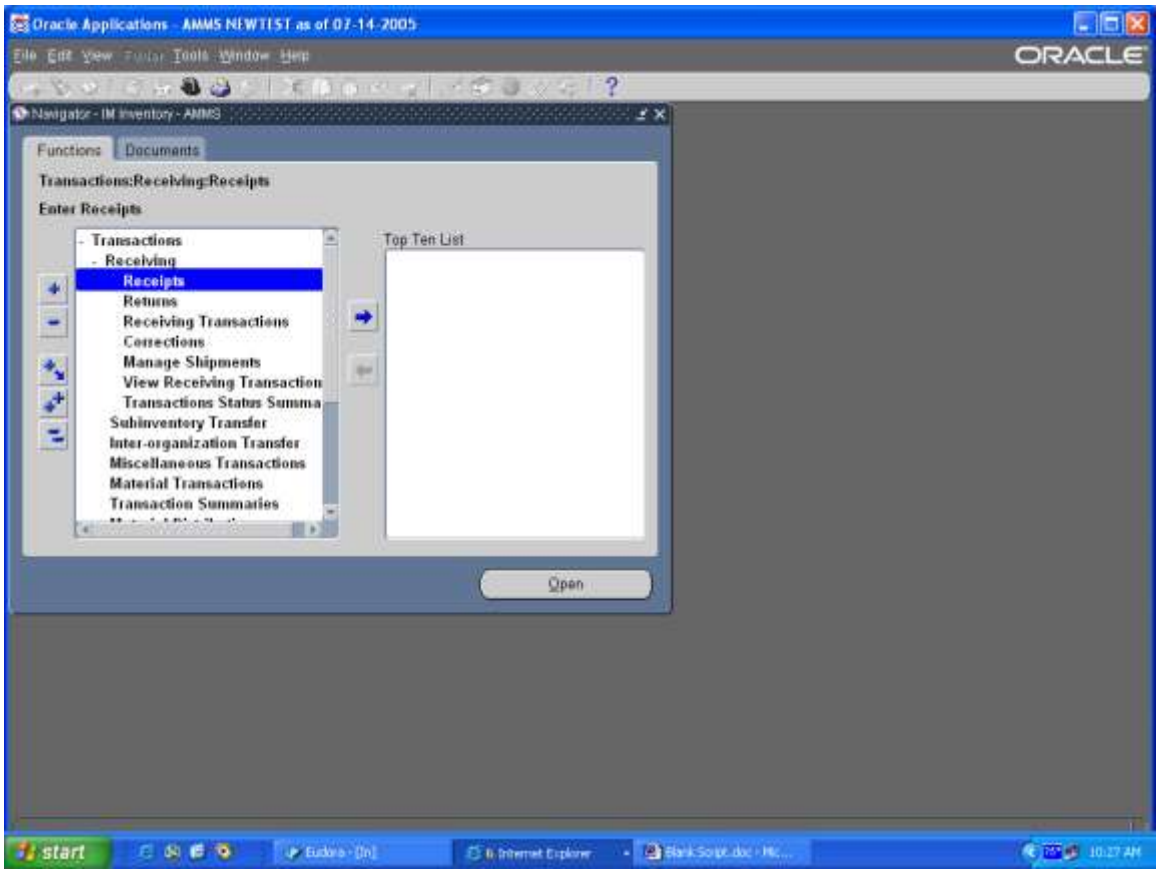
Step Description: Sign onto Oracle and select your Receiving Inventory AMMS responsibility

Expected Results: Receiving Inventory main menu will appear



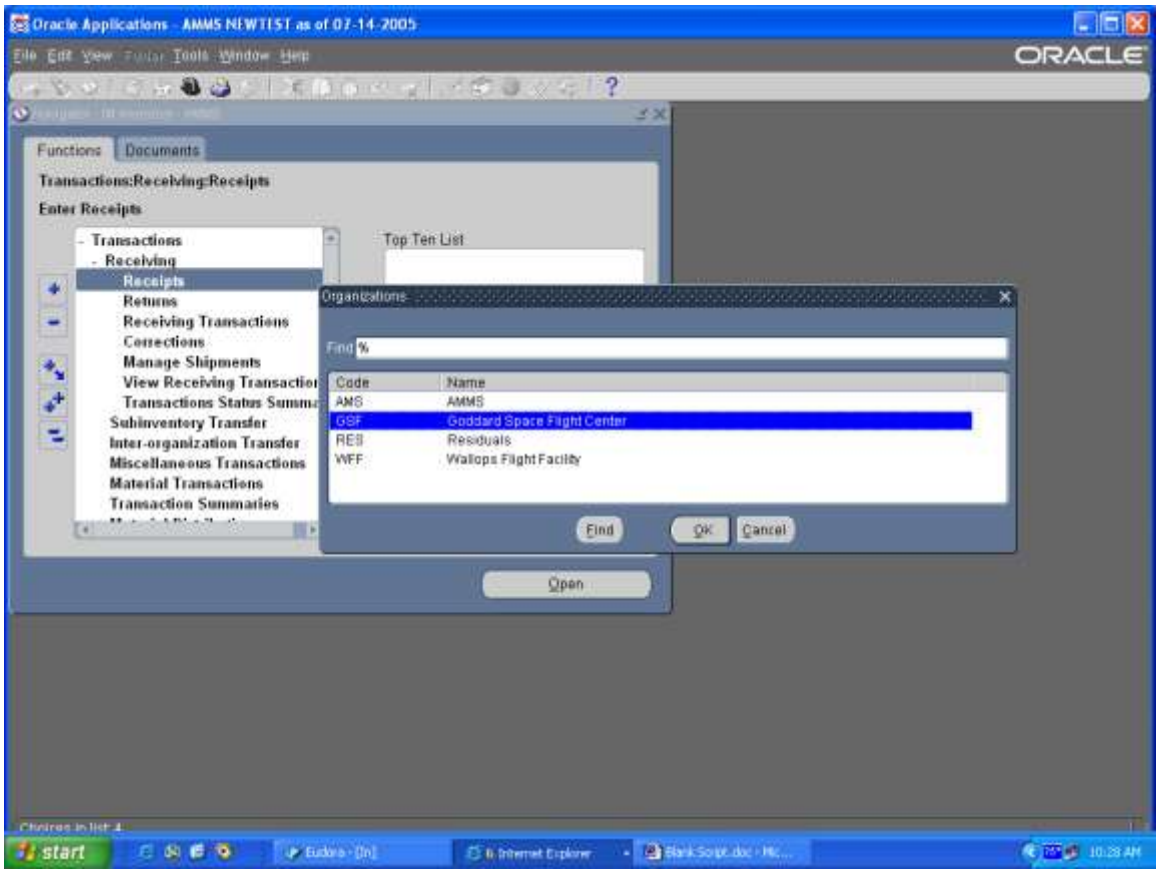
Step Description: From the Receiving Inventory AMMS main menu select Transactions > Receiving > Receipts, click on the open button

Expected Results: Organization window will appear



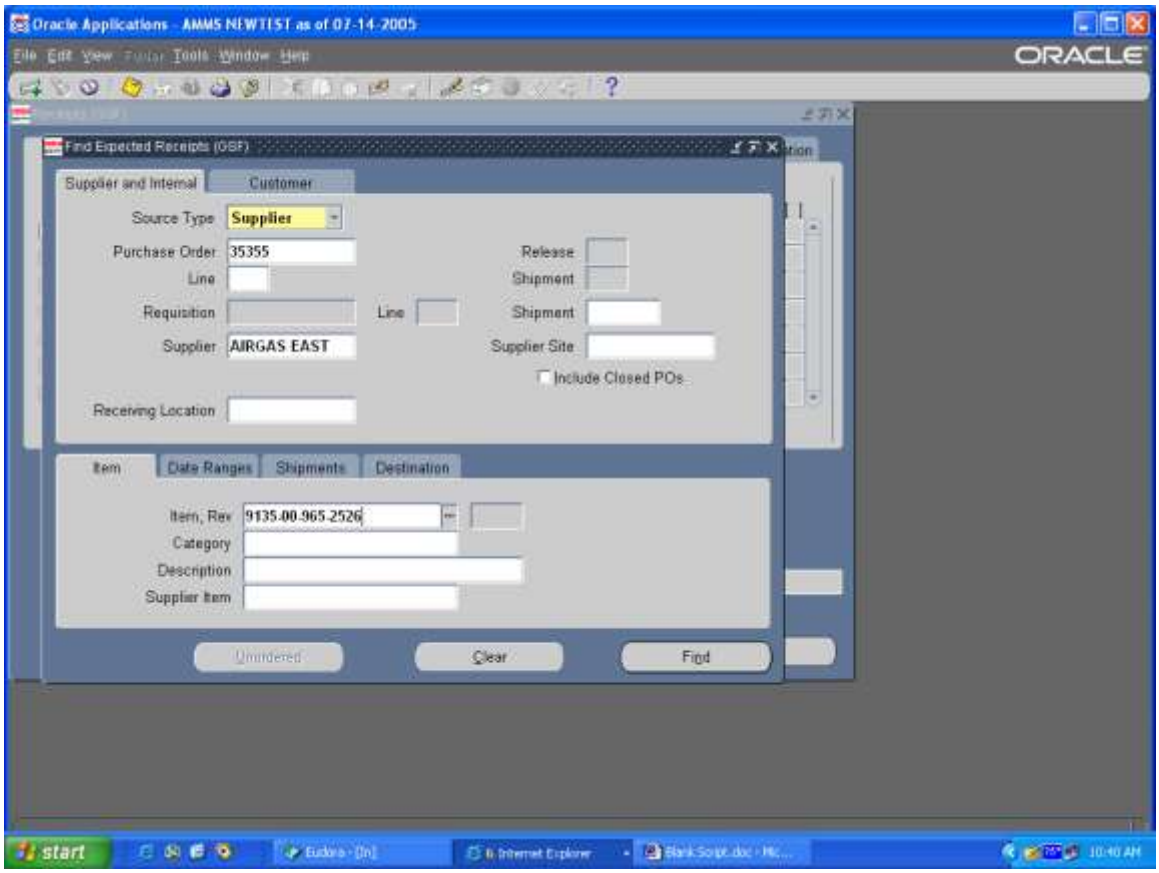
Step Description: From the Organization window select the appropriate organization, GSF for Goddard, WFF for Wallops, click OK

Expected Results: Find Expected Receipts window will appear



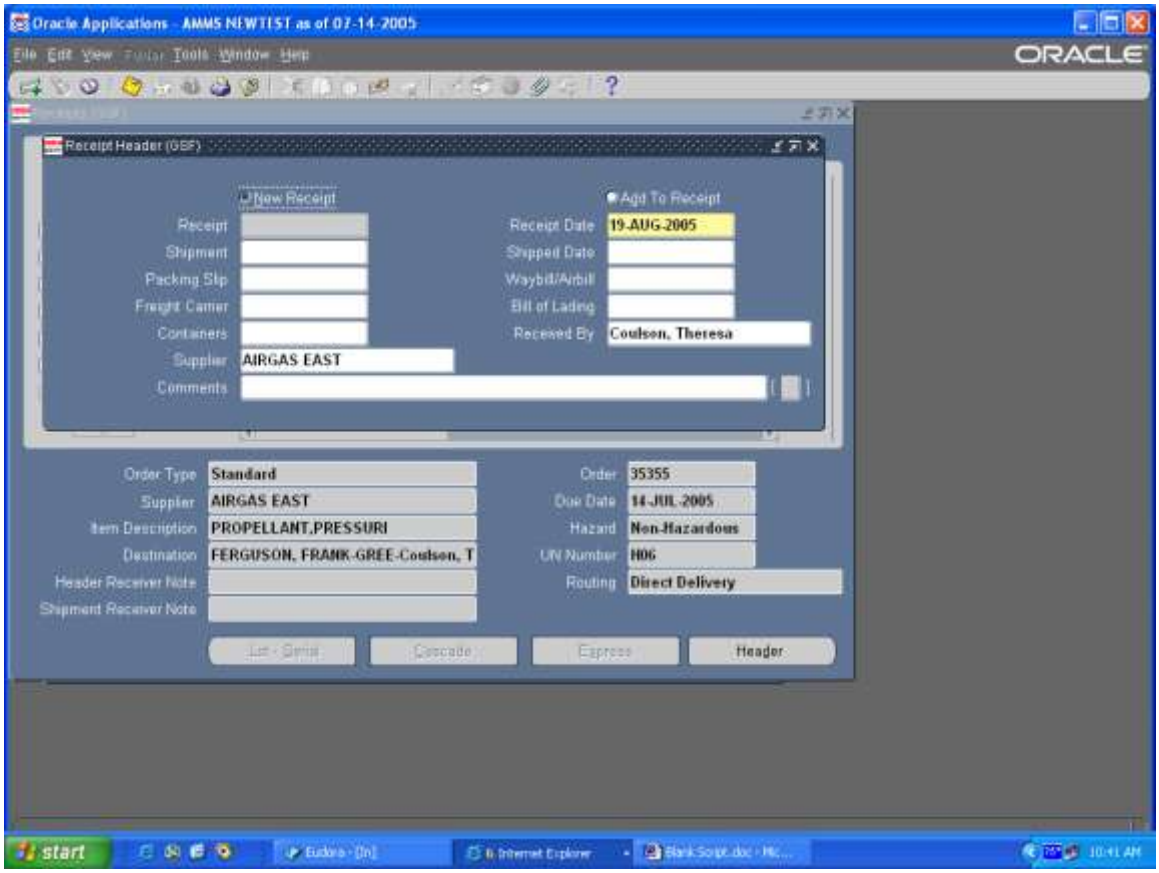
Step Description: At the Find Expected Receipts window enter the Purchase Order number, and if possible the Item number, click on the Find button

Expected Results: Receipt Header window will appear



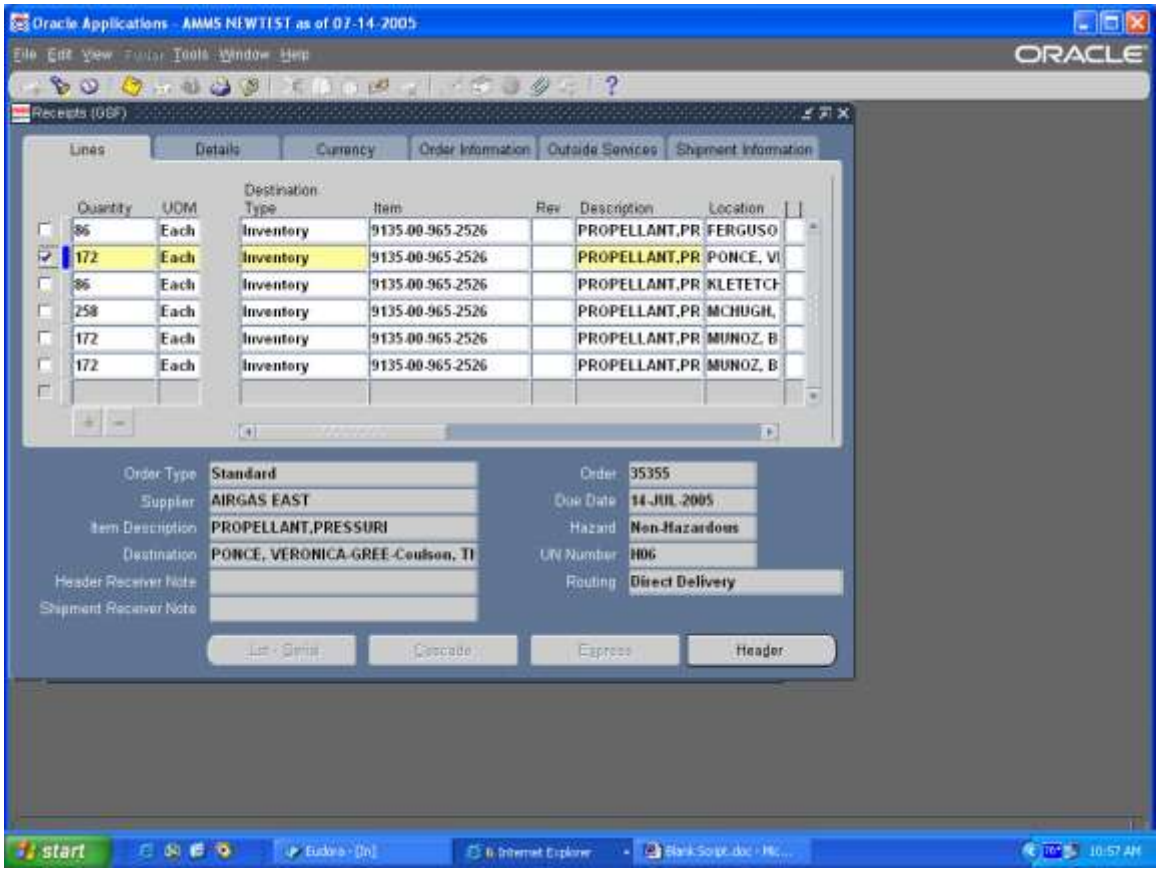
Step Description: Close the Receipt Header window

Expected Results: Receipts window will appear



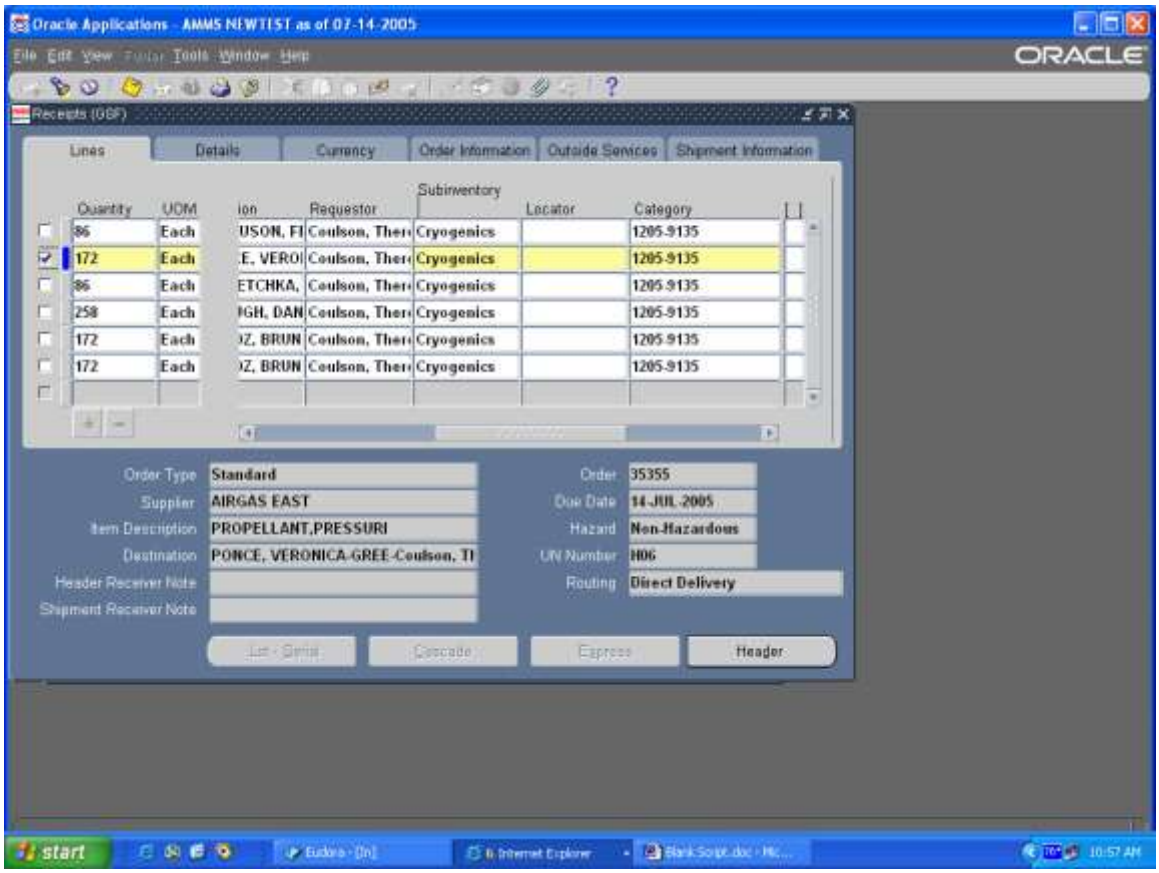
Step Description: Select the line that you want to receive, place a check mark in the box at the beginning of the line.

Expected Results: Line will be selected



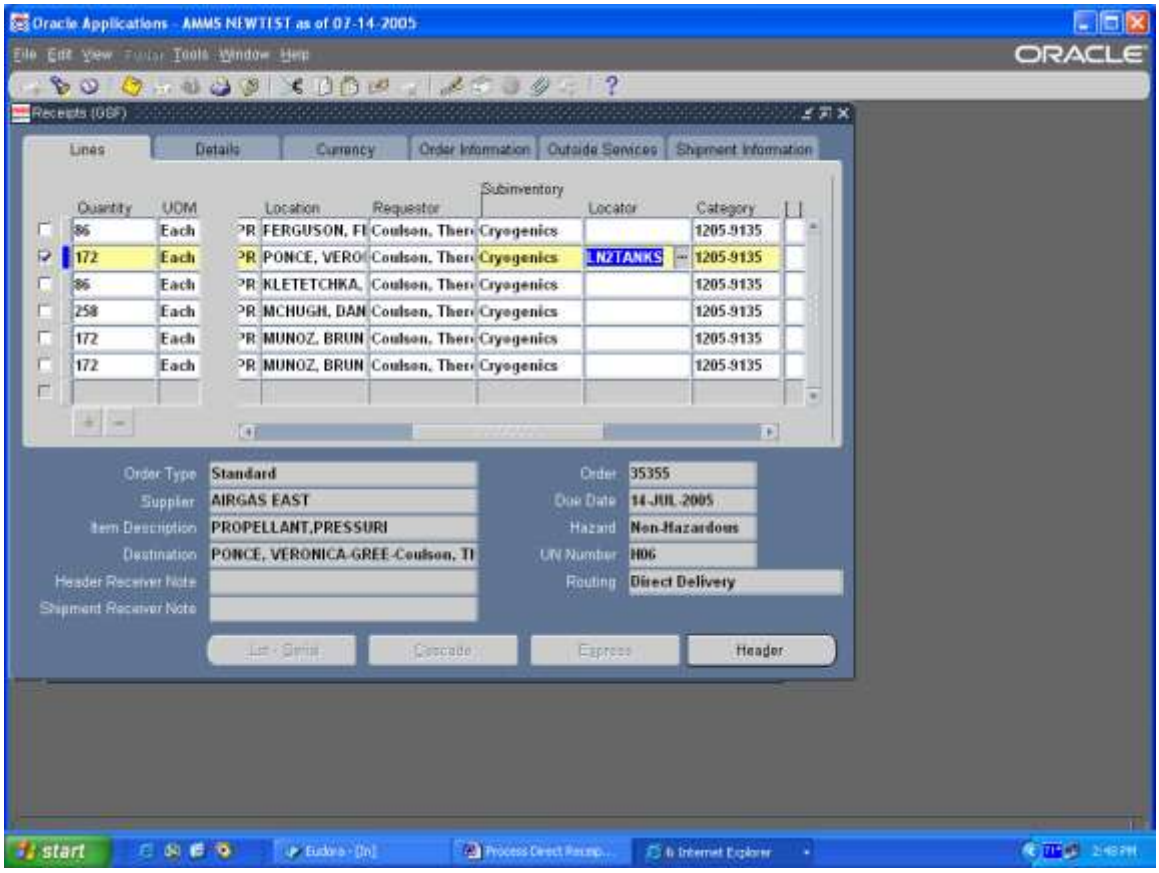
Step Description: Use the scroll bar and move to the right until you see the Sub Inventory and Locator fields

Expected Results: Window view will change



Step Description: The Sub Inventory field should already be populated, if not click on the LOV and select the appropriate sub inventory, click in the locator field and enter the locator that the material is being delivered to.

Expected Results: Fields will be populated

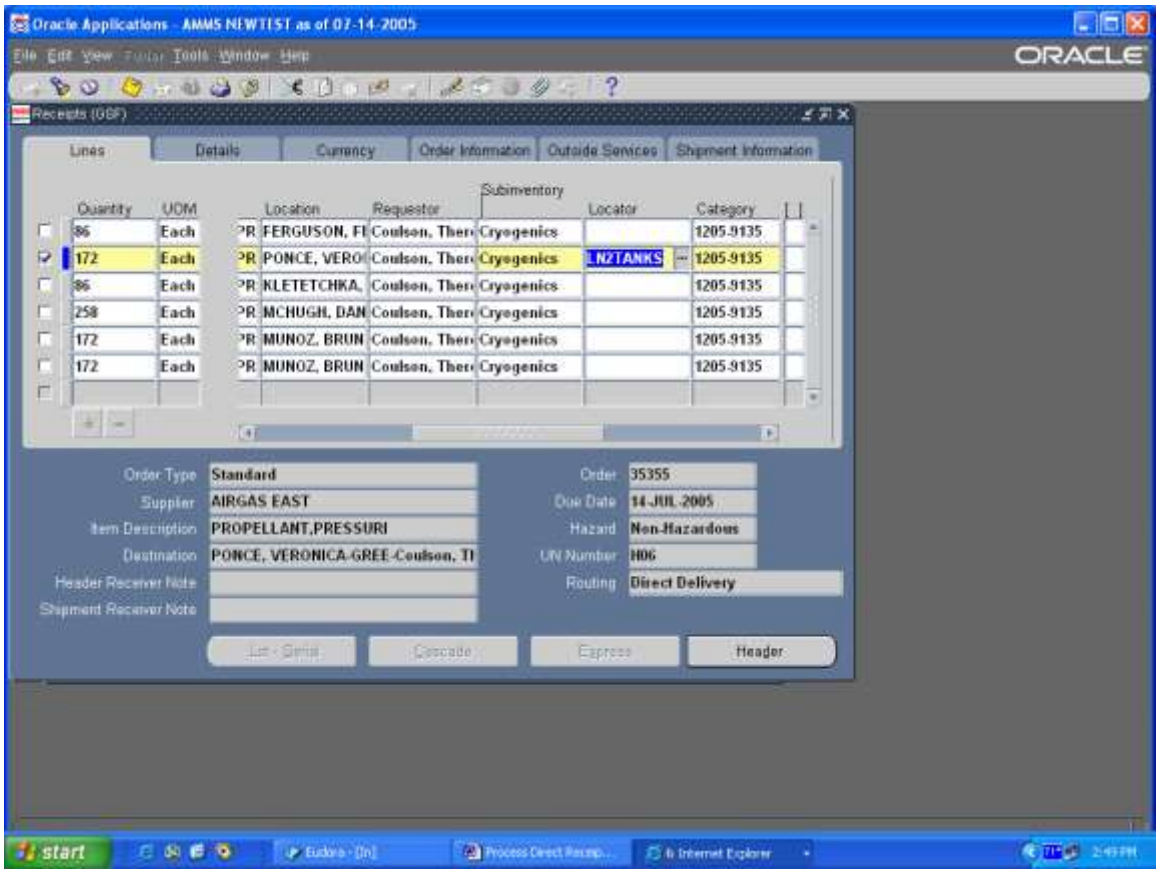


Note : NEVER choose the Staging sub inventory, if there are no other sub inventories, contact the appropriate Material Coordinator.

****Short Cut: At the locator field enter a % sign hit tab, this will bring up the locators assigned to this item**

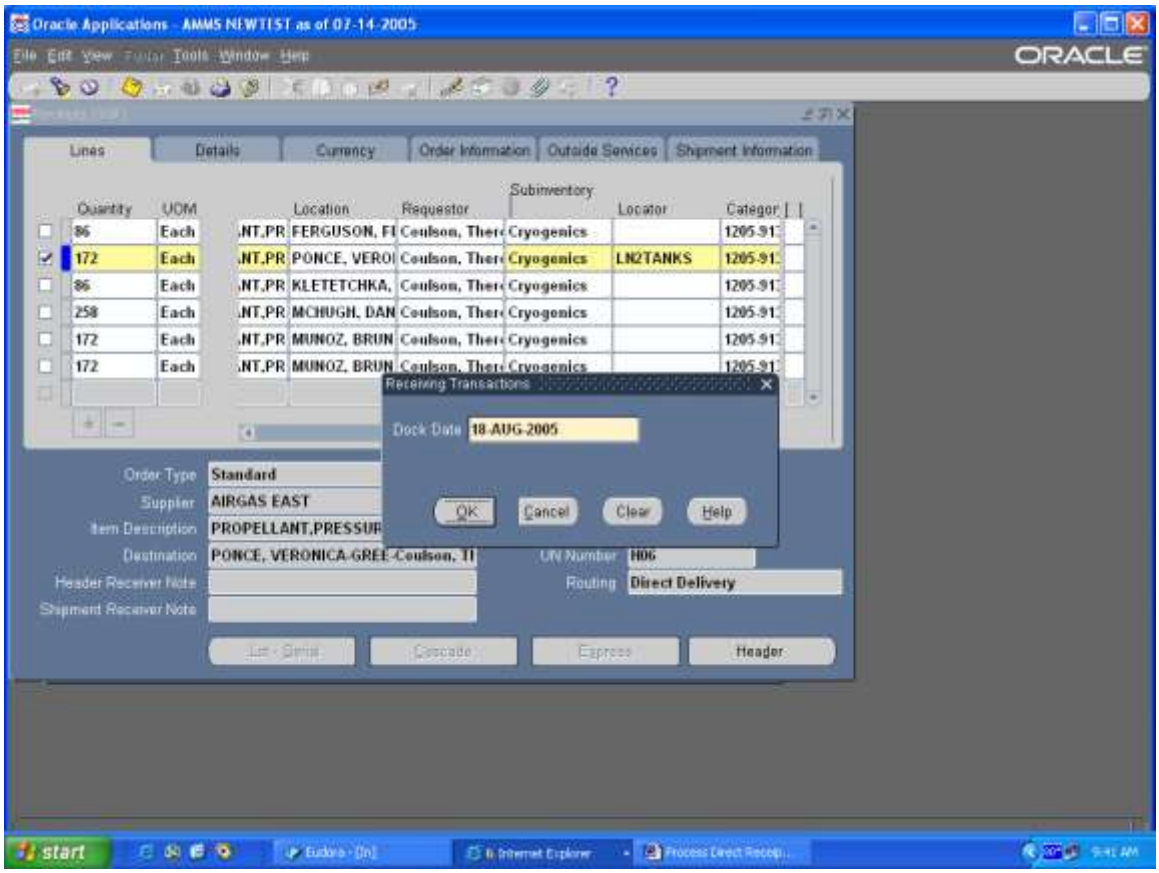
Step Description: Go to the field at the end of the line with the [ ] and click in this field. This is a Descriptive Flex Field

Expected Results: Receiving Transactions window will appear



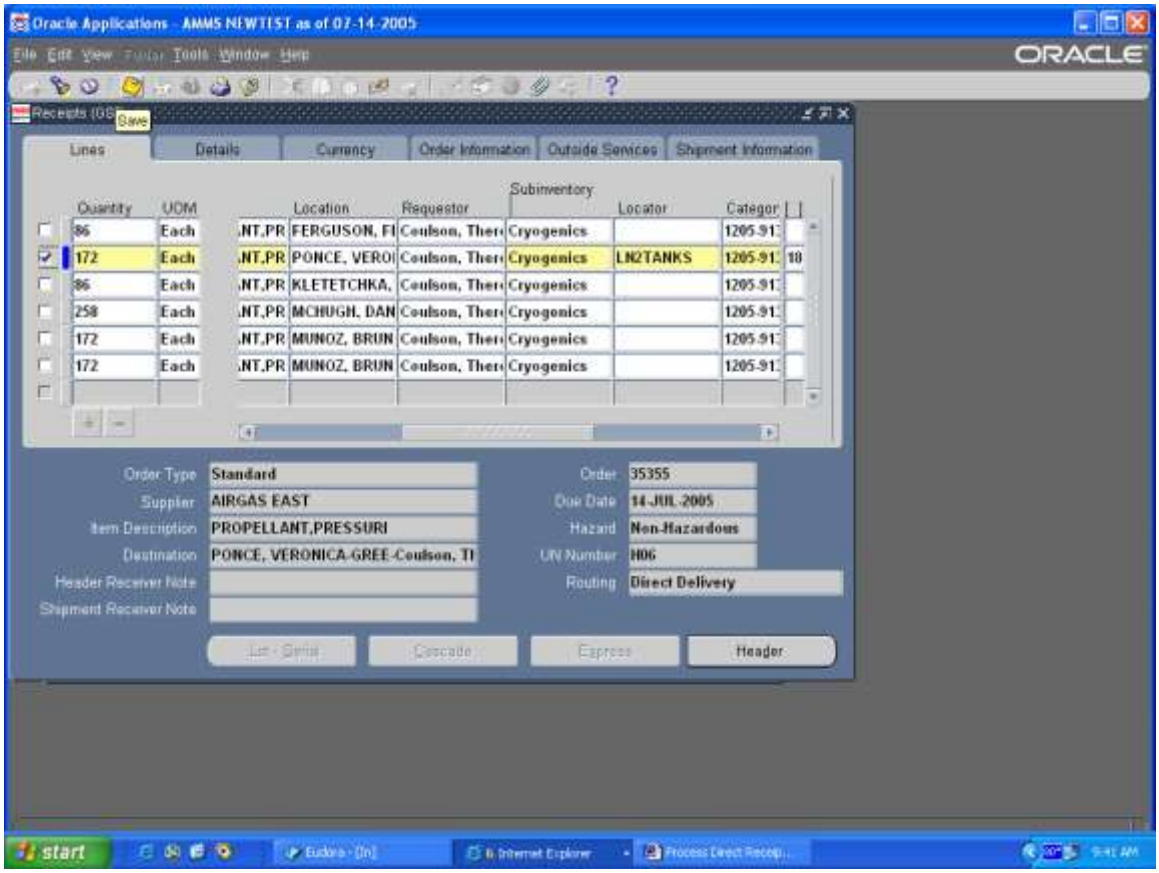
Step Description: In the Dock Date field enter the date the material was physically delivered, example 18-AUG-2005, click OK

Expected Results: Return to the Receipts window



Step Description: Save your work

Expected Results: Transactions Completed, Applied and Saved



AMMS TRAINING SCRIPT

Process JIT Receipt

Purpose

The purpose of this training script is to provide instructions on how to process a JIT Receipt.

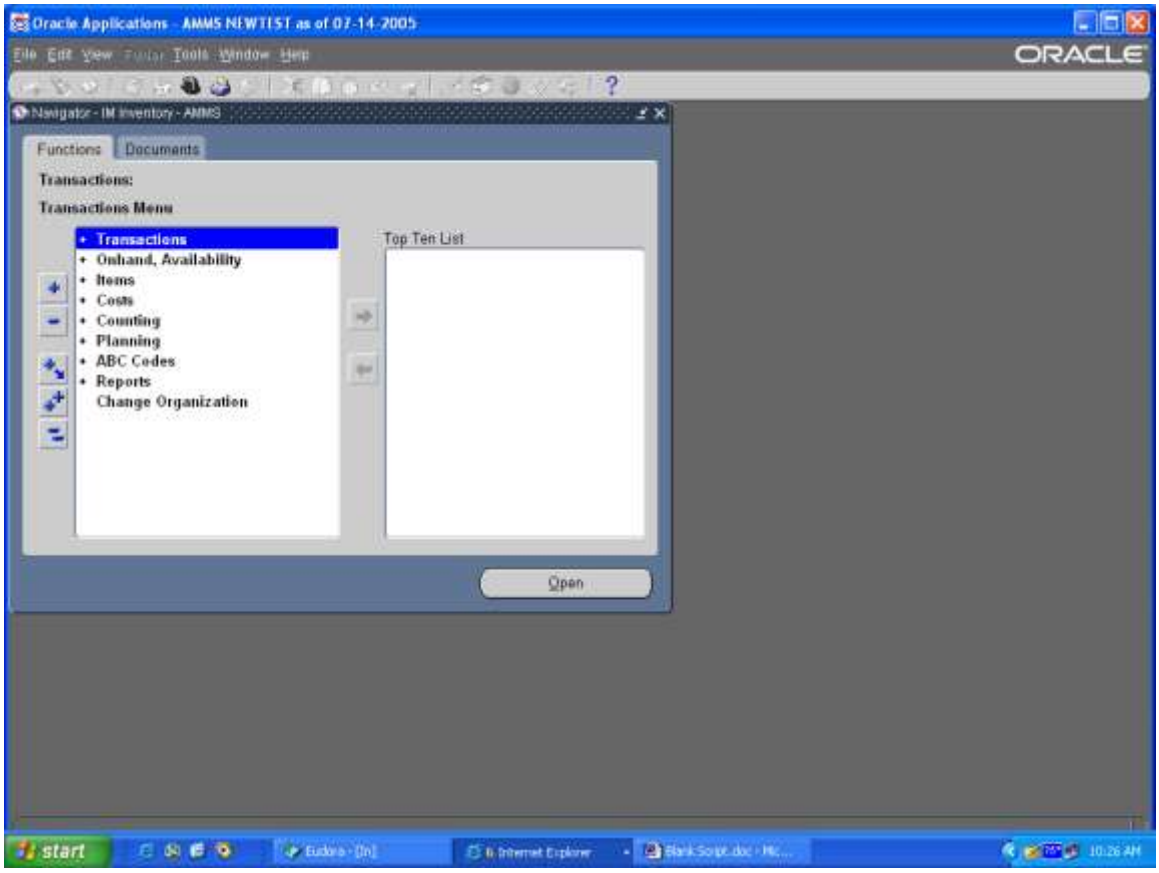
Audience

Inspectors, Material Coordinators, and Supply Technicians

Prepared By	Theresa Coulson
Creation Date:	08/19/2006
Document Name	Process JIT Receipt.doc
Version	3
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Receiving.	

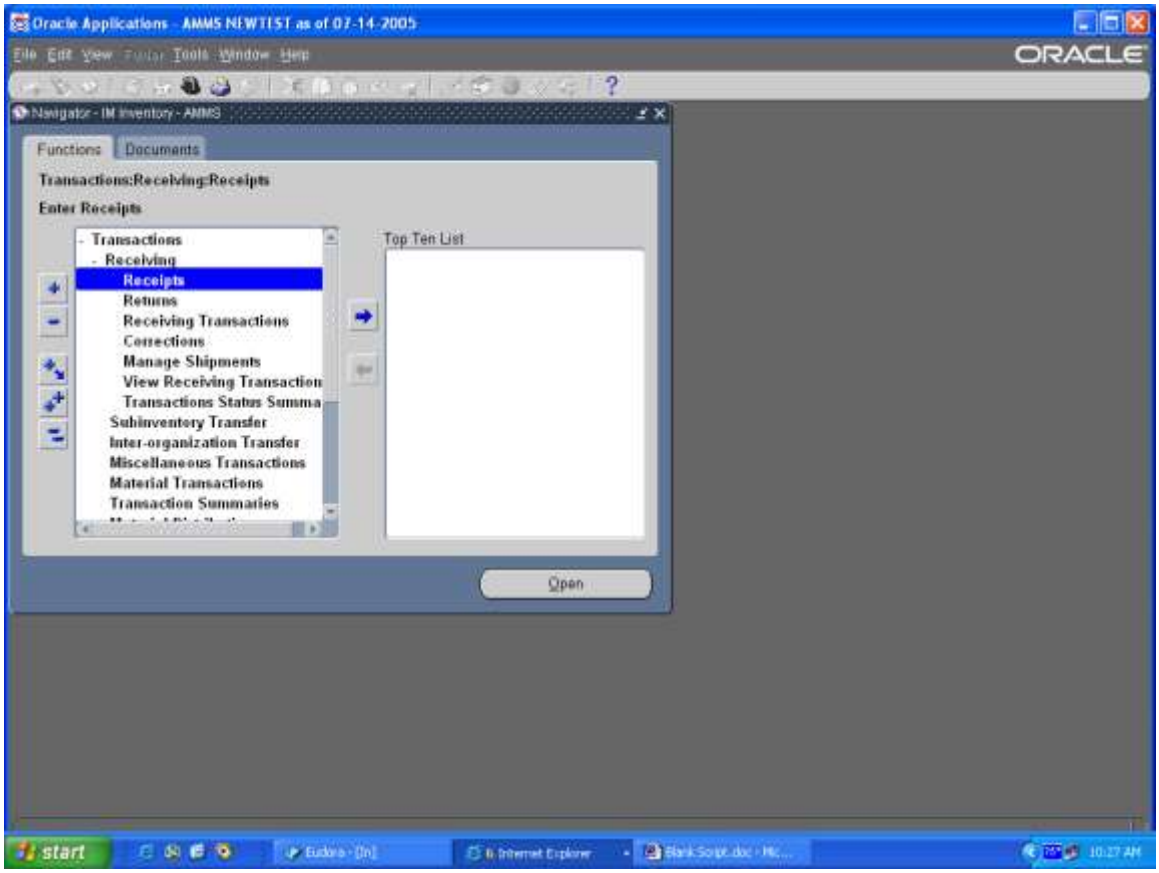
Step Description: Sign onto Oracle and select your IM Inventory AMMS responsibility

Expected Results: IM Inventory main menu will appear



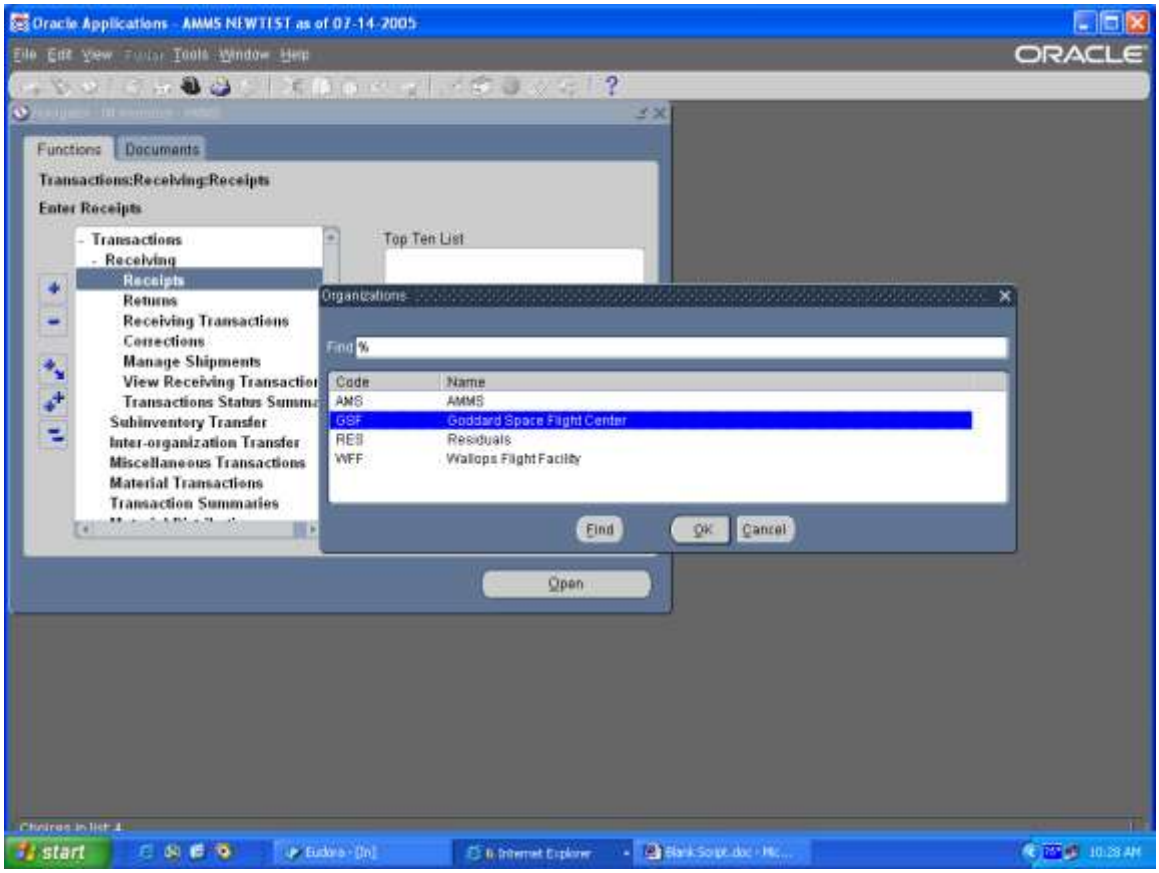
Step Description: From the IM Inventory AMMS main menu select Transactions > Receiving > Receipts, click on the open button

Expected Results: Organization window will appear



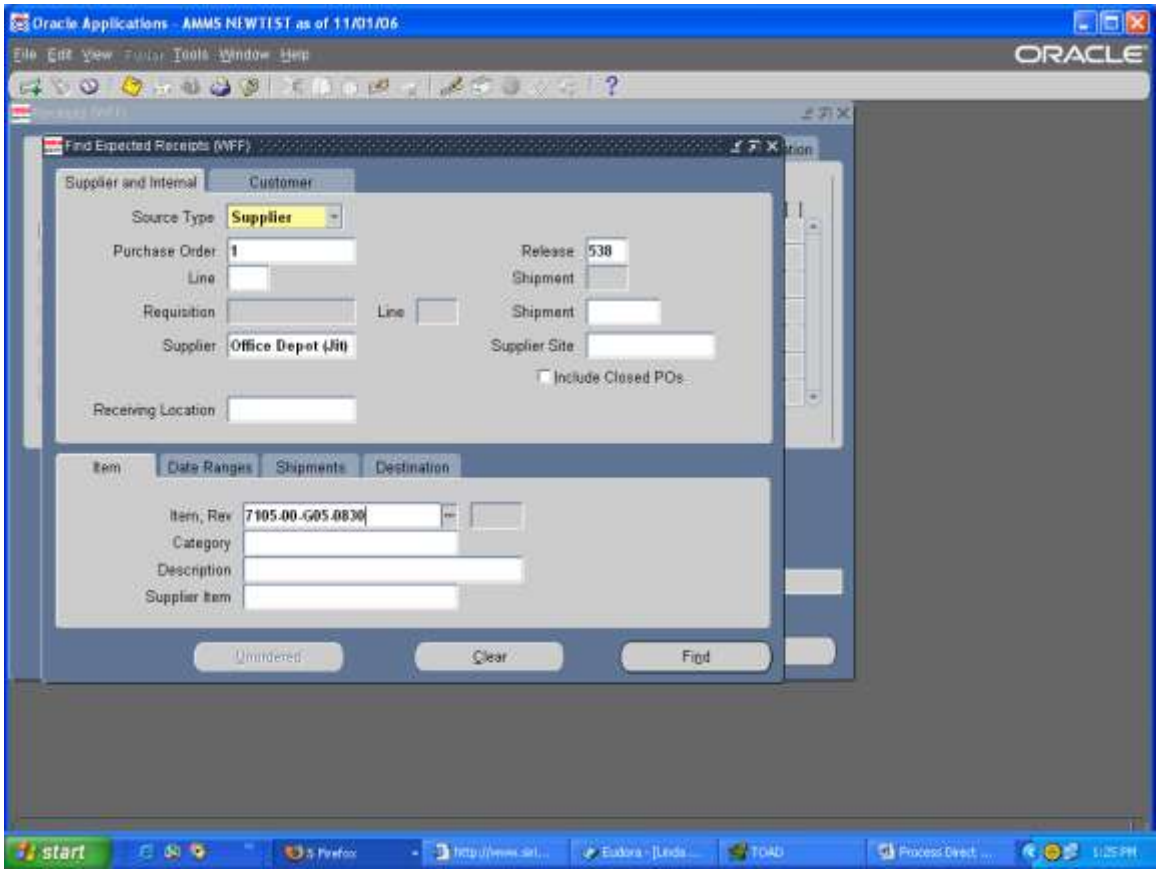
Step Description: From the Organization window select the appropriate organization, GSF for Goddard, WFF for Wallops, click OK

Expected Results: Find Expected Receipts window will appear



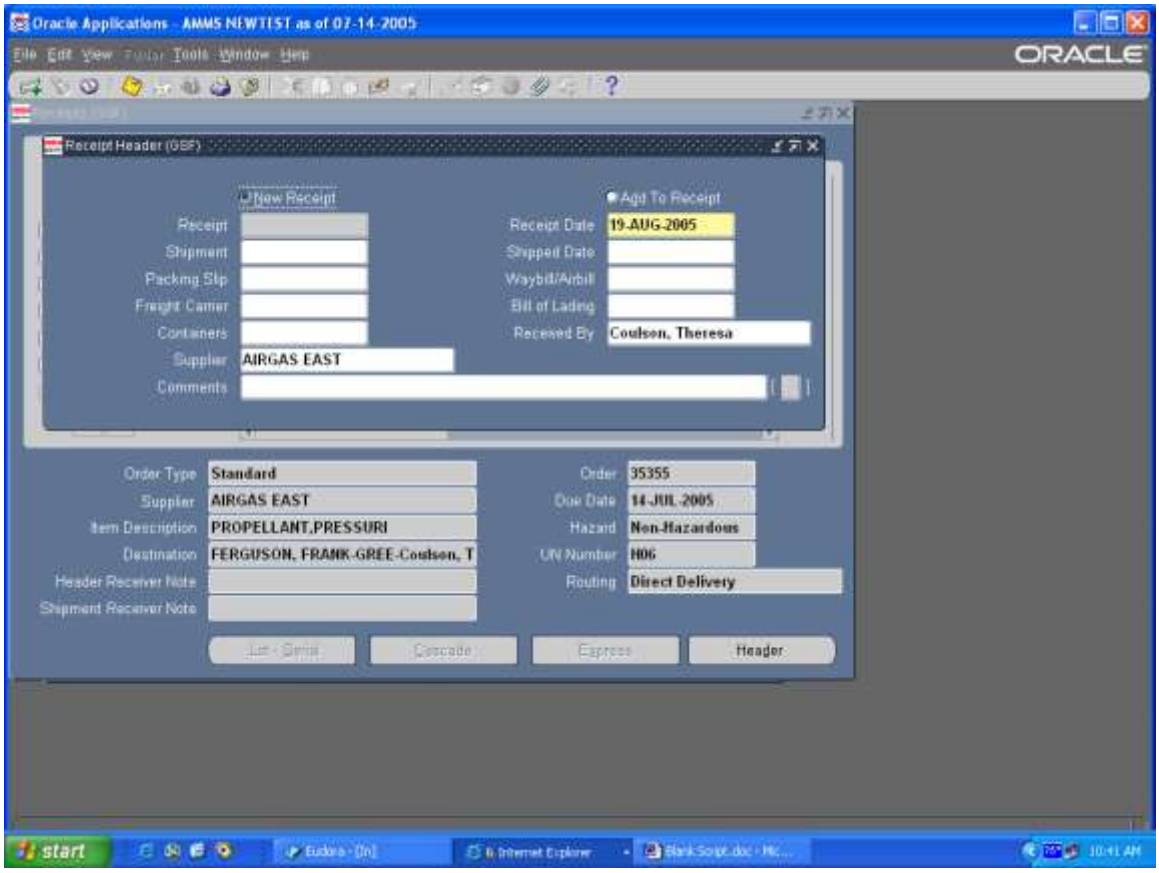
Step Description: At the Find Expected Receipts window enter the Purchase Order number, release number and Item number, click on the Find button

Expected Results: Receipt Header window will appear



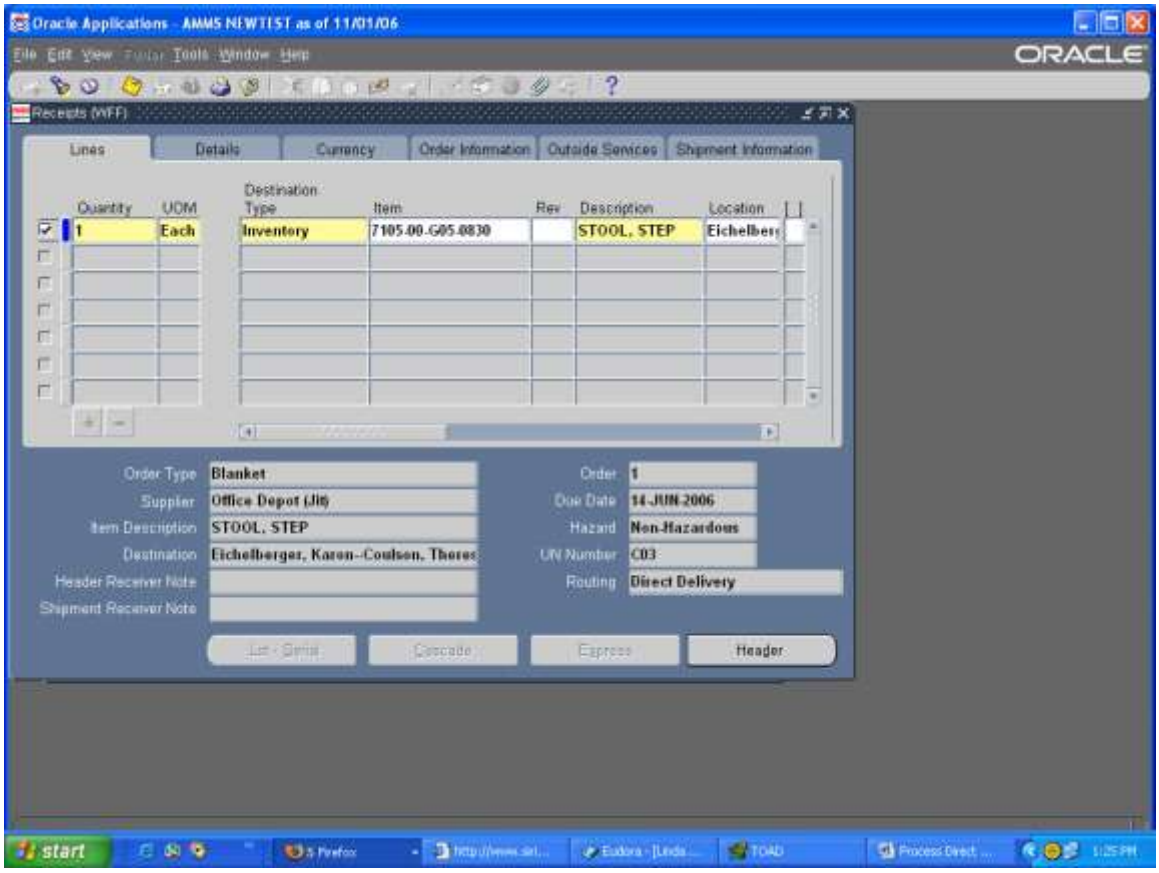
Step Description: Close the Receipt Header window

Expected Results: Receipts window will appear



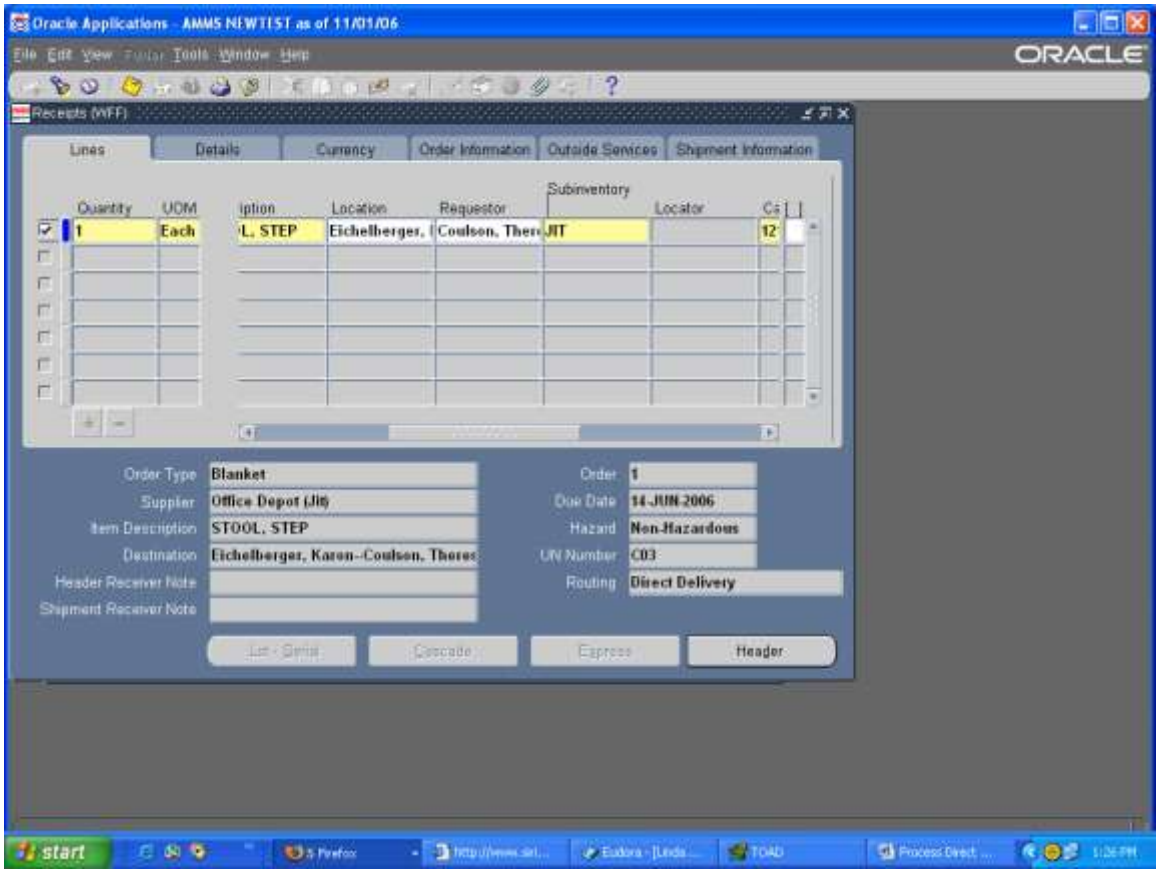
Step Description: Verify that this is the correct order, check the Location field , if the customer name matches the JIT receipt this is the correct line. Select the line that you want to receive, place a check mark in the box at the beginning of the line.

Expected Results: Line will be selected



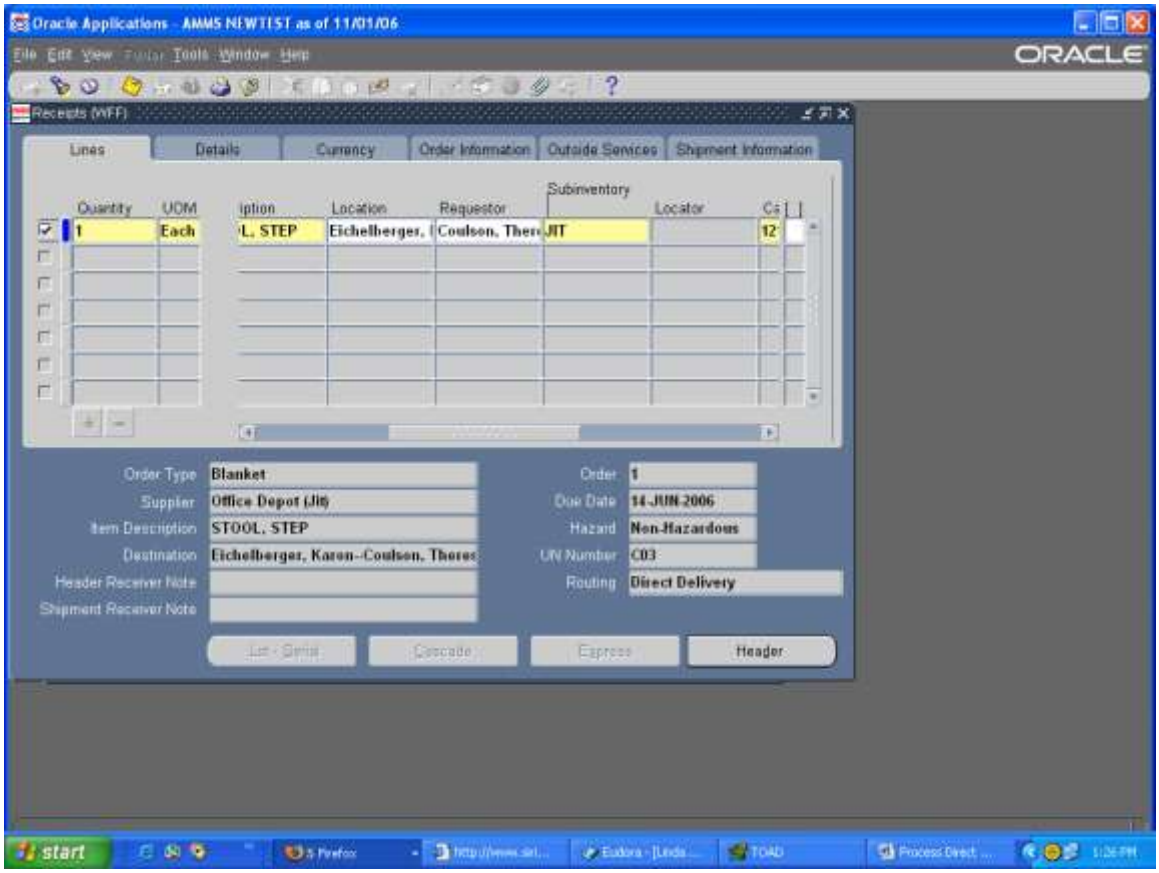
Step Description: Use the scroll bar and move to the right until you see the Sub Inventory and Locator fields

Expected Results: Window view will change



Step Description: The Sub Inventory field should already be populated, if not click on the LOV and select the appropriate sub inventory.

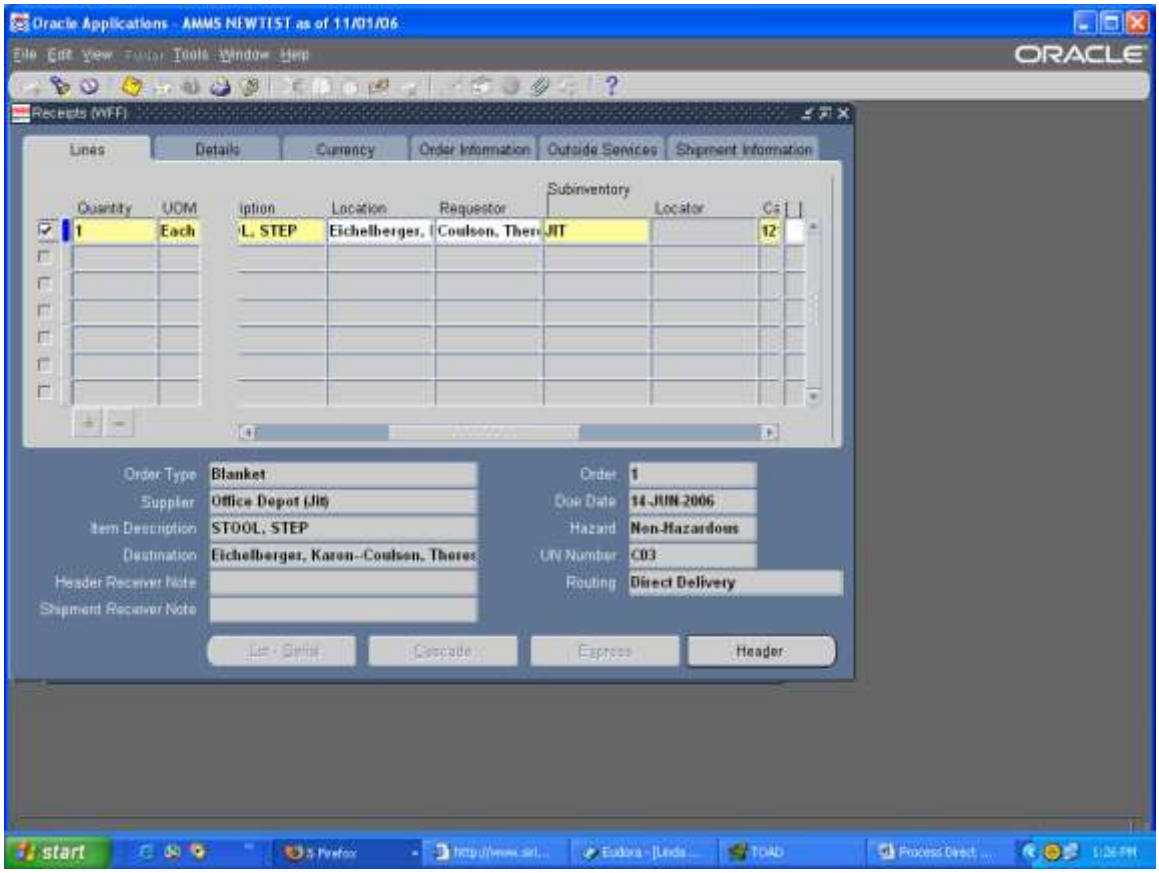
Expected Results: Fields will be populated



Note : NEVER choose the Staging sub inventory, if there are no other sub inventories, contact the appropriate Material Coordinator.

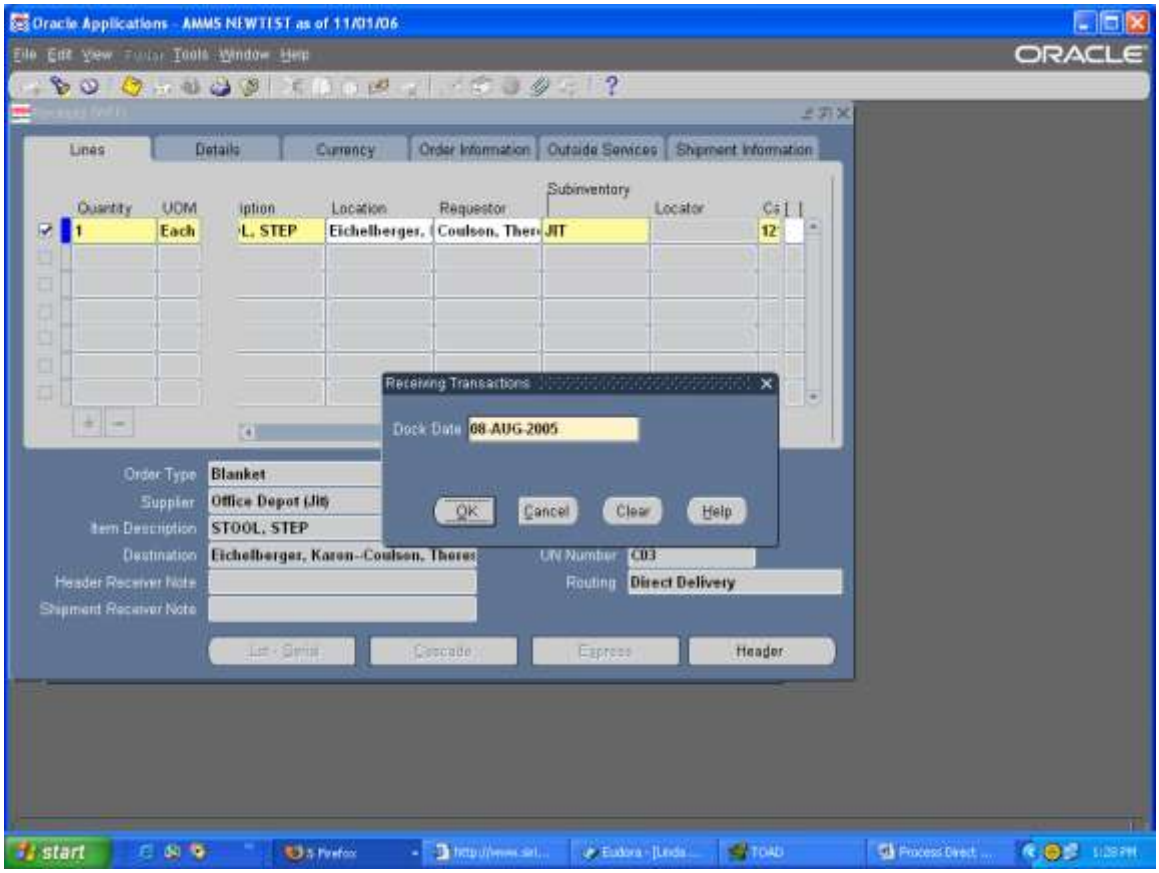
Step Description: Go to the field at the end of the line with the [ ] and click in this field. This is a Descriptive Flex Field

Expected Results: Receiving Transactions window will appear



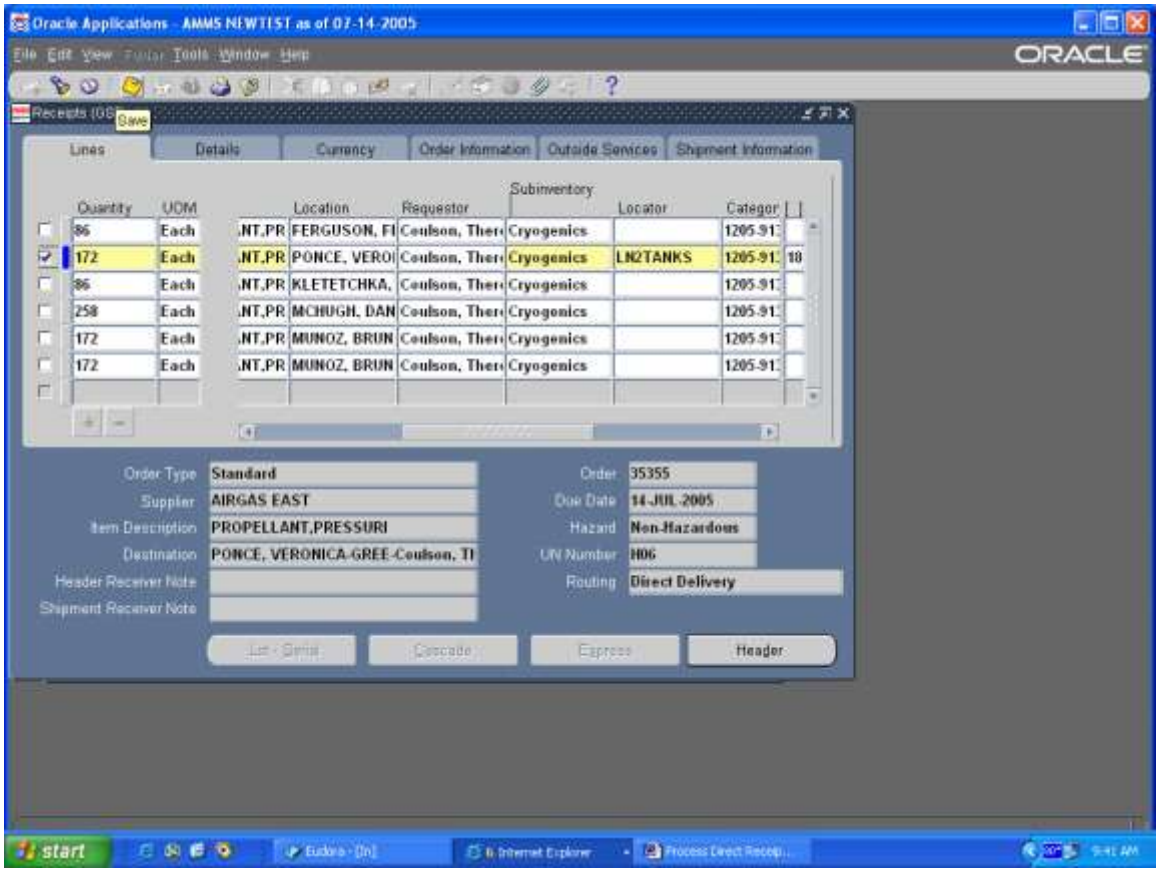
Step Description: In the Dock Date field enter the date the material was physically delivered, example 18-AUG-2005, click OK

Expected Results: Return to the Receipts window



Step Description: Save your work

Expected Results: Transactions Completed, Applied and Saved



AMMS TRAINING SCRIPT
Process Standard Receipt

Purpose

The purpose of this training script is to provide detailed instructions on how to process a receipt for an item, receive, accept and deliver

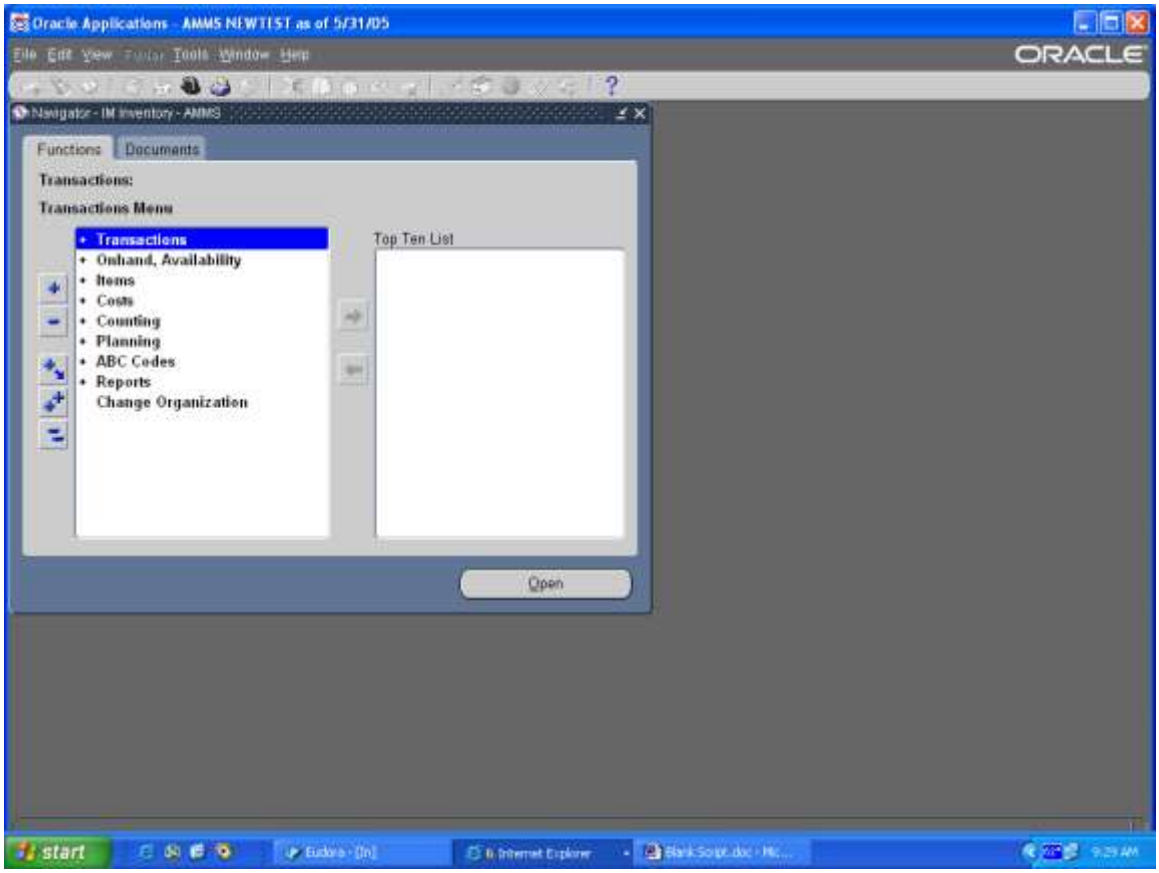
Audience

Material Coordinators, Supply Technicians, and Inspectors

Prepared By	Theresa Coulson
Creation Date:	08/22/2005
Document Name	Process Standard Receipt.doc
Version	2
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Receiving.	

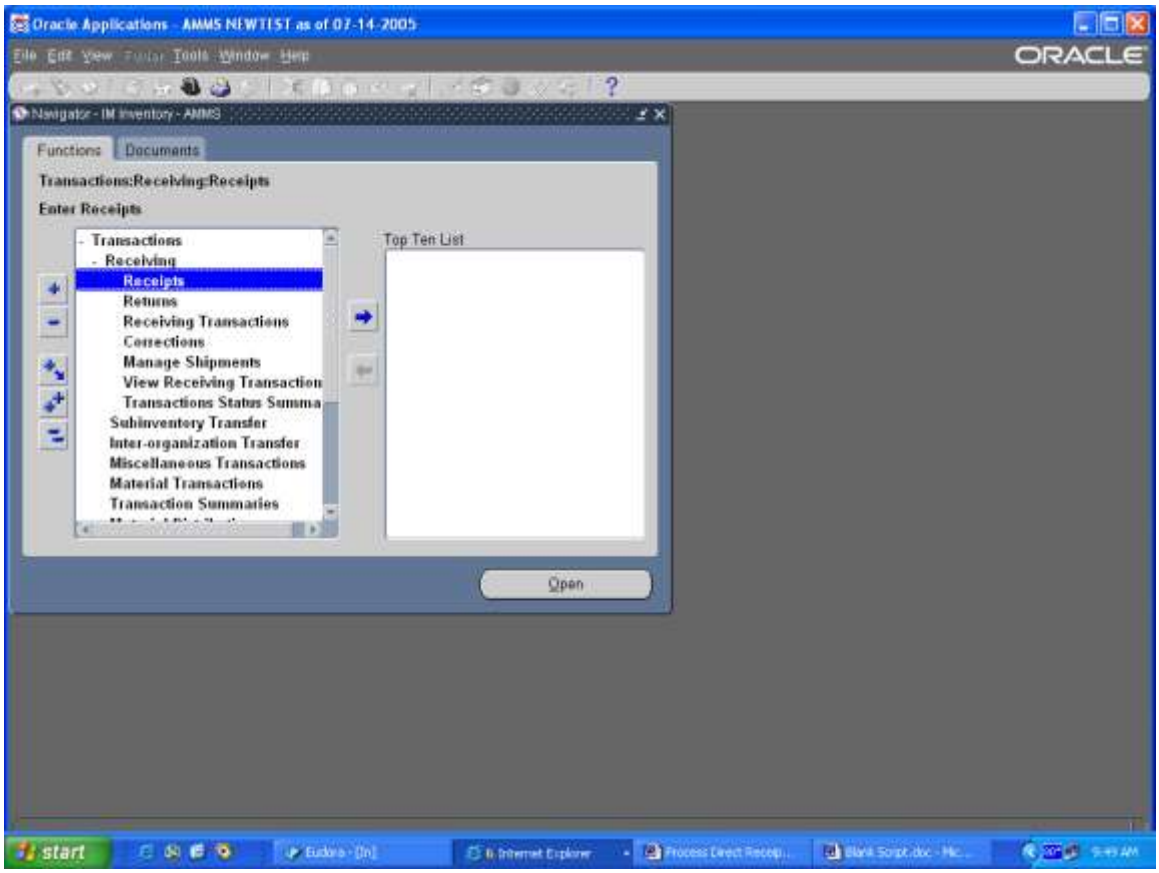
Step Description: Sign onto Oracle and select the Receiving Inventory AMMS responsibility

Expected Results: Receiving Inventory AMMS main menu will appear



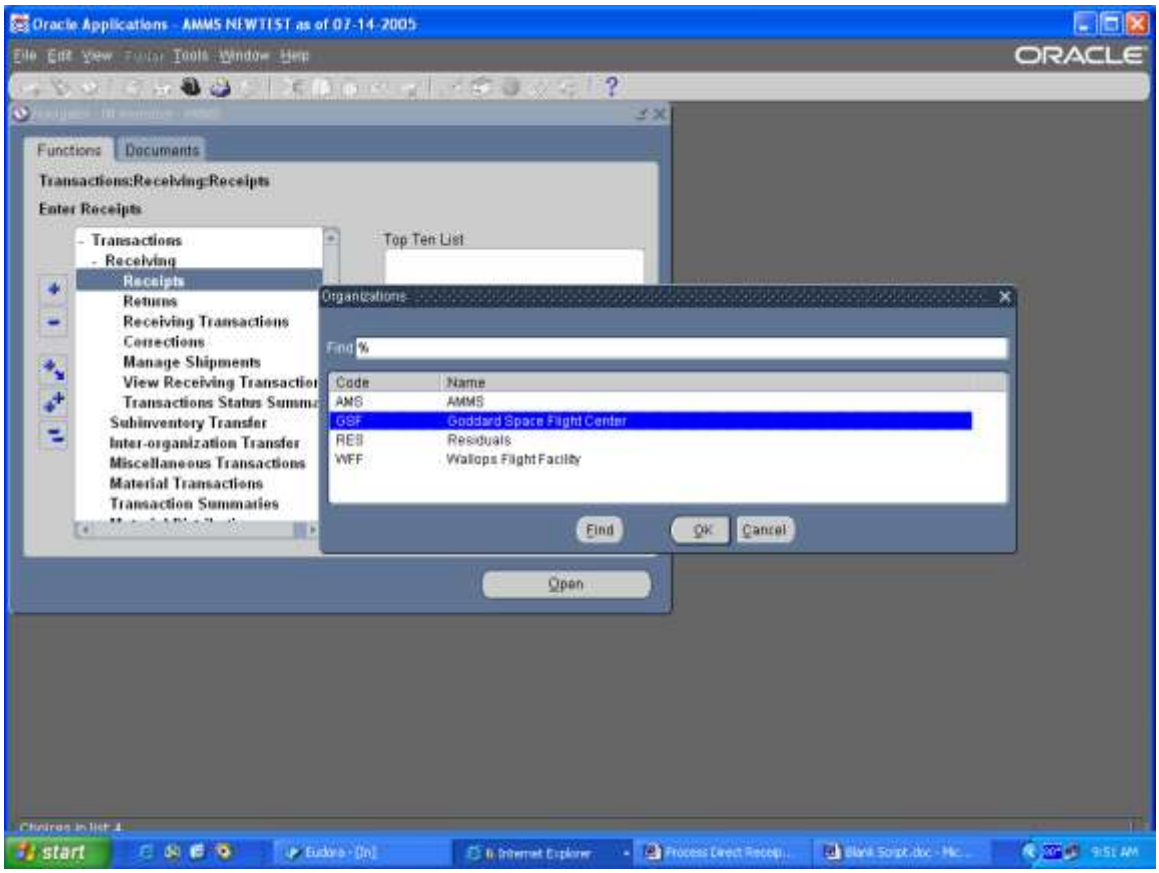
Step Description: From the Receiving Inventory AMMS main menu select Transactions > Receiving > Receipts, click on the Open button

Expected Results: Organization window will open



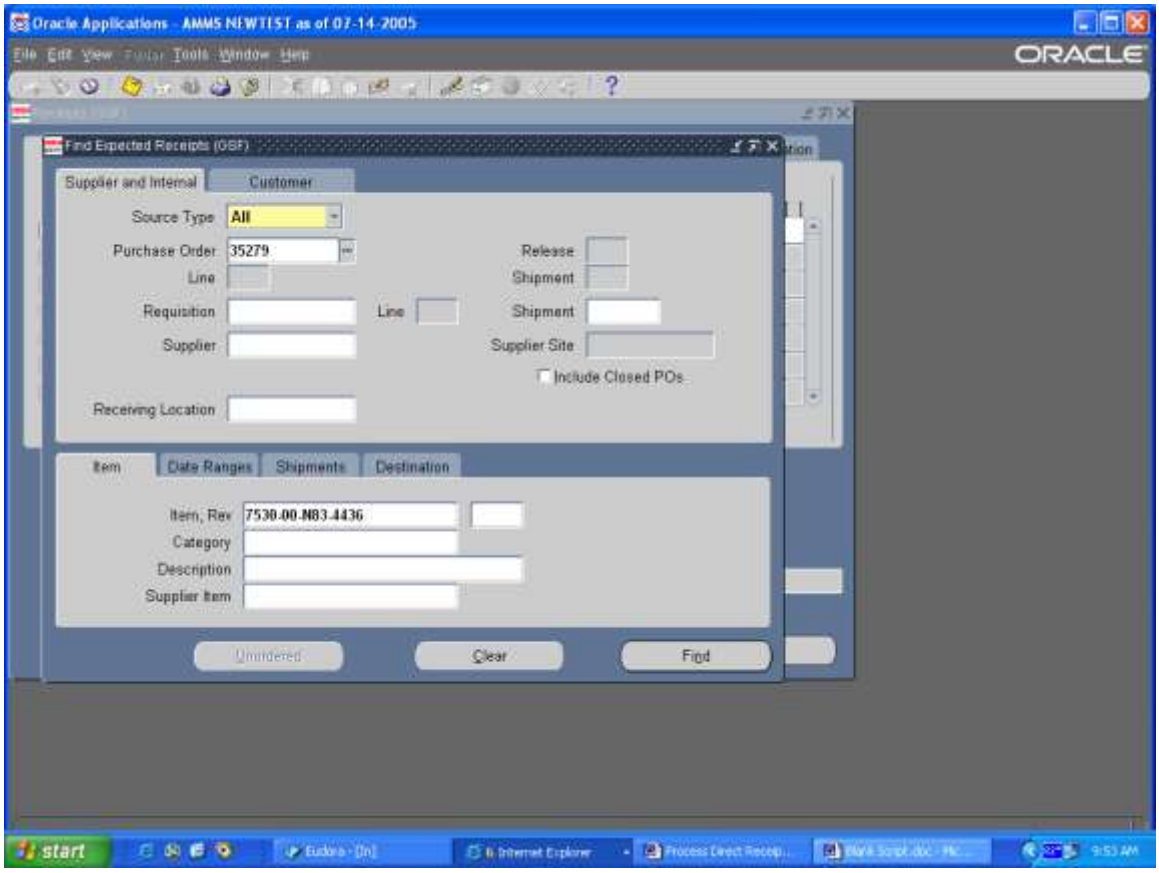
Step Description: From the Organization window select the appropriate organization. GSF for Goddard or WFF for Wallops, click the OK button

Expected Results: Find Expected Receipts window will appear



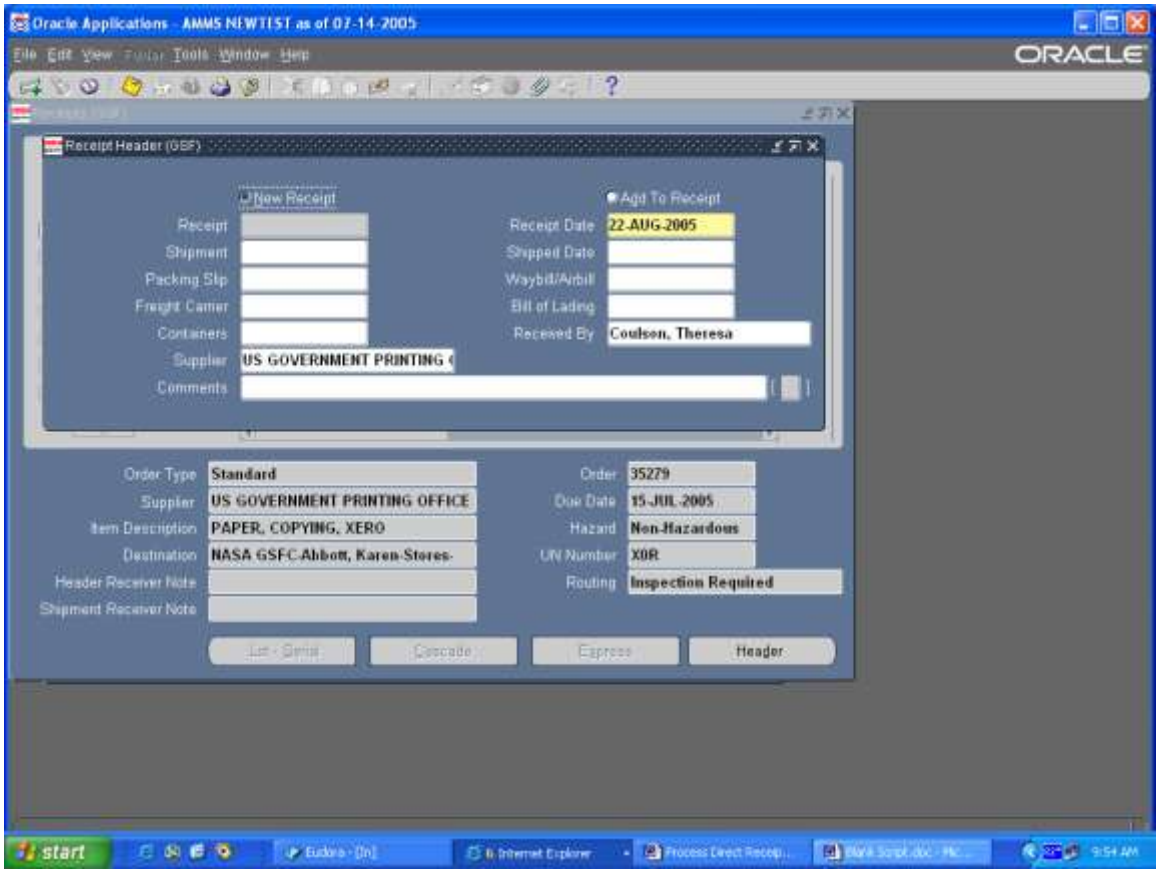
Step Description: In the Purchase Order field enter the PO number for the material that you are receiving, in the Item, Rev field enter the stock number for the item if known, click on the Find button

Expected Results: Receipt Header window will appear



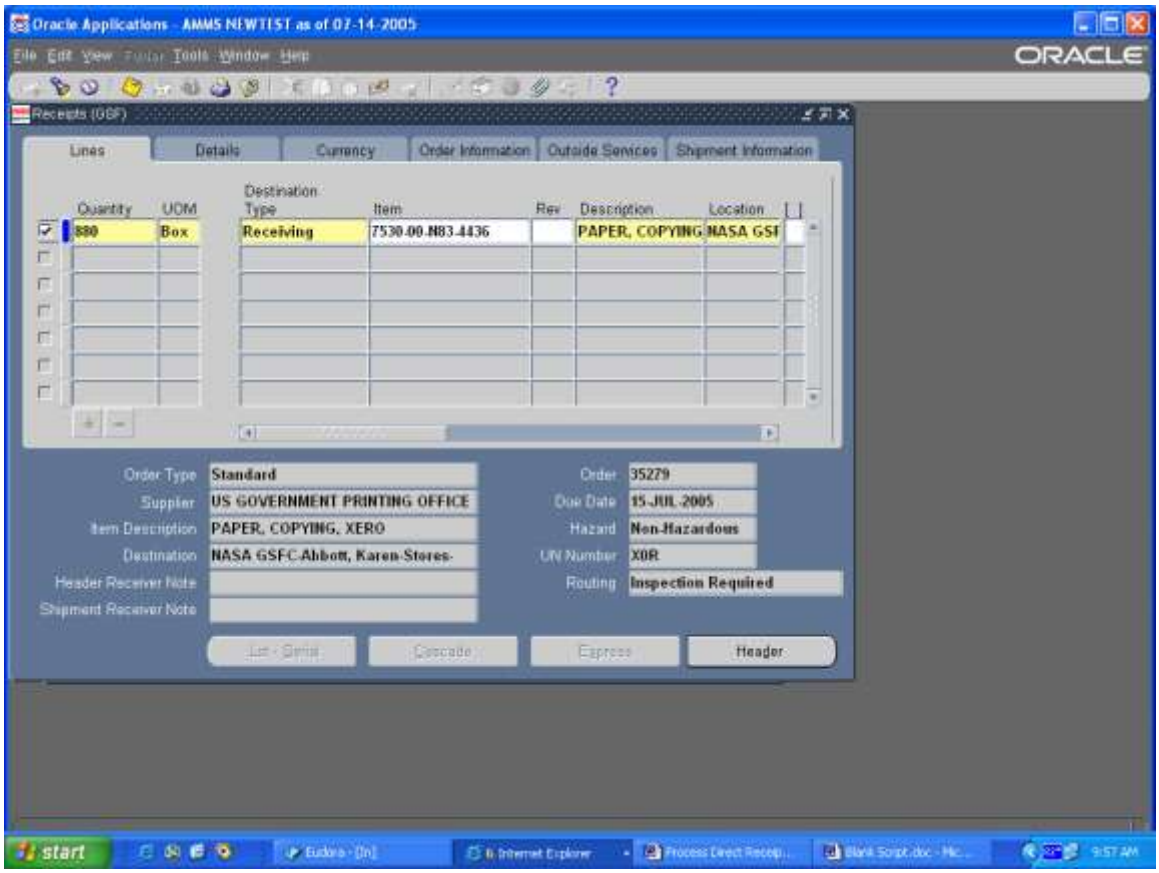
Step Description: Close the Receipt Header window

Expected Results: Receipts window will appear



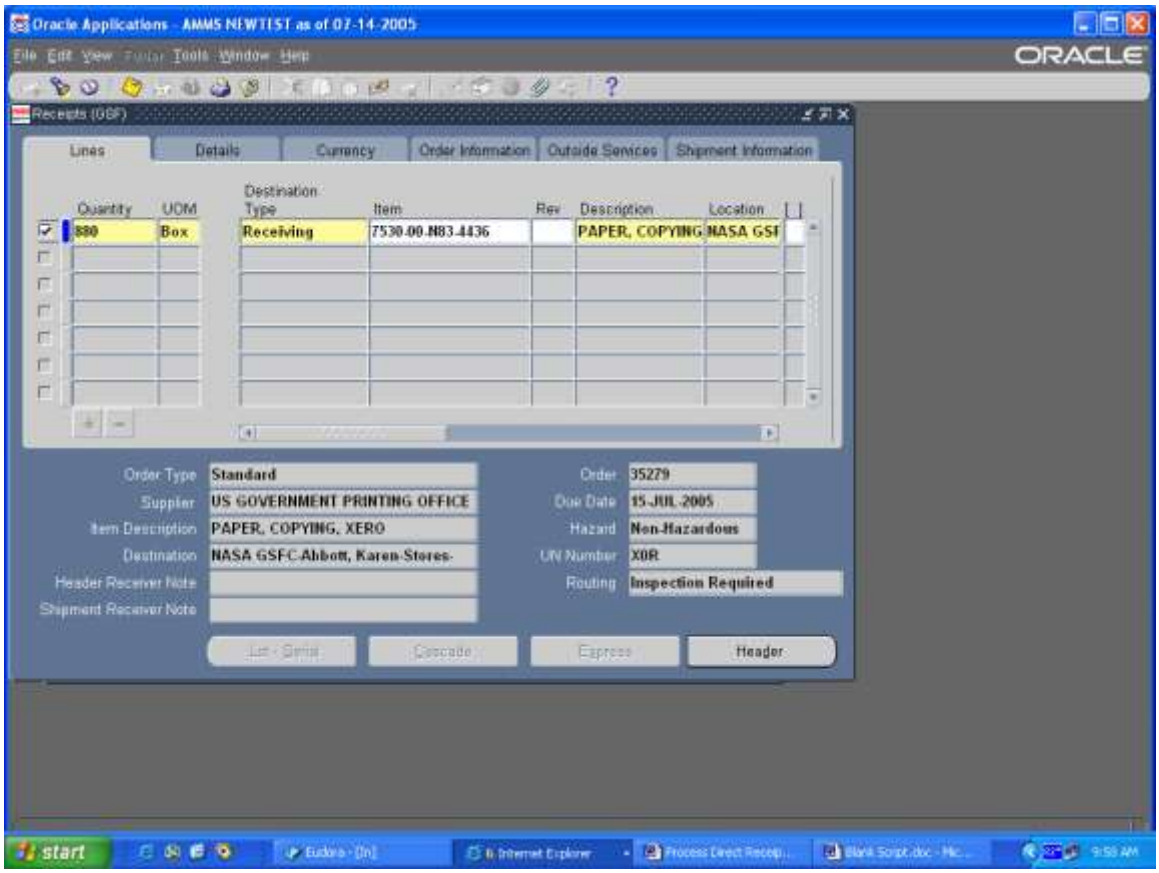
Step Description: At the Receipts window, place a check mark in the box at the beginning of the line, this will select the line that you want to receive.

Expected Results: Line will be selected



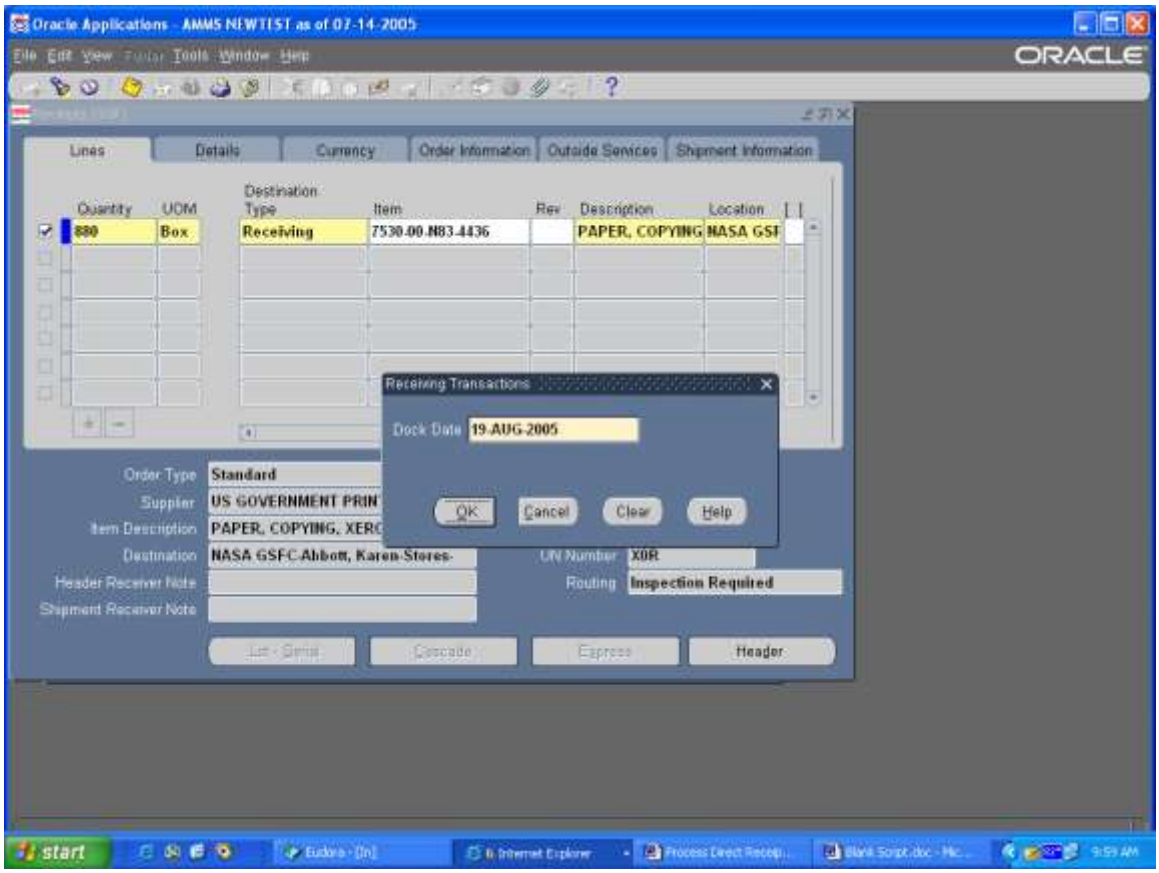
Step Description: Go to the field at the very end of the line with [ ], this is the Descriptive Flex Field, click in this field

Expected Results: Receiving Transactions window will appear



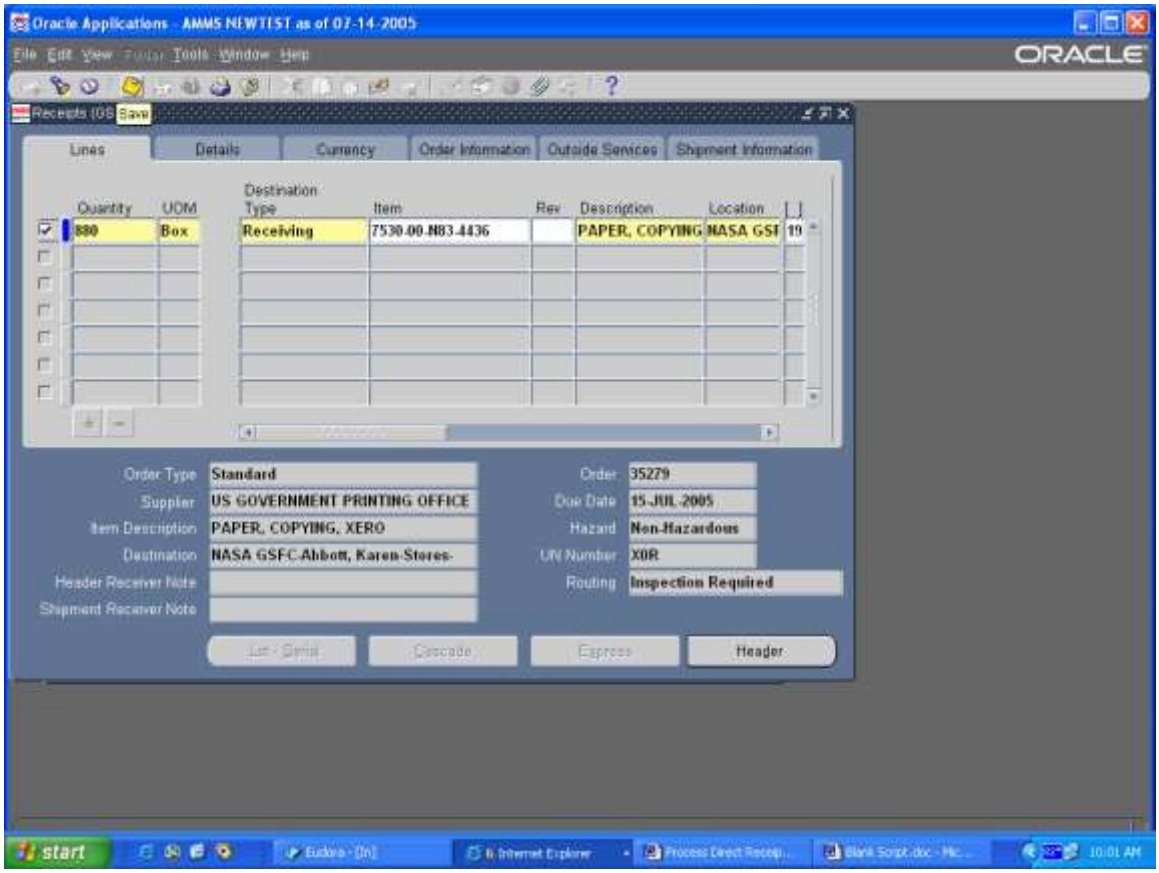
Step Description: In the Dock Date field enter the date the material was physically delivered, example 19-AUG-2005, click the OK button

Expected Results: Field will be populated and return to Receipts window



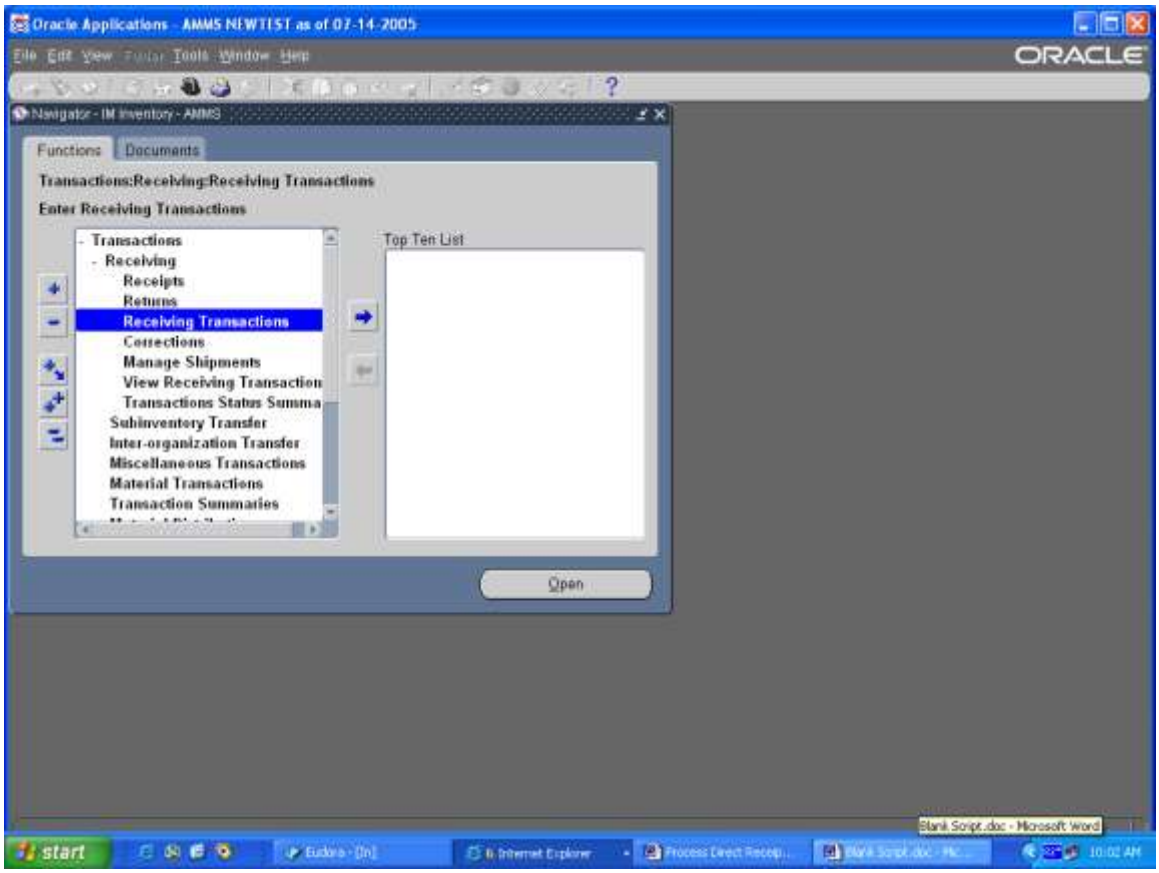
Step Description: Save your work

Expected Results: Transaction Completed message



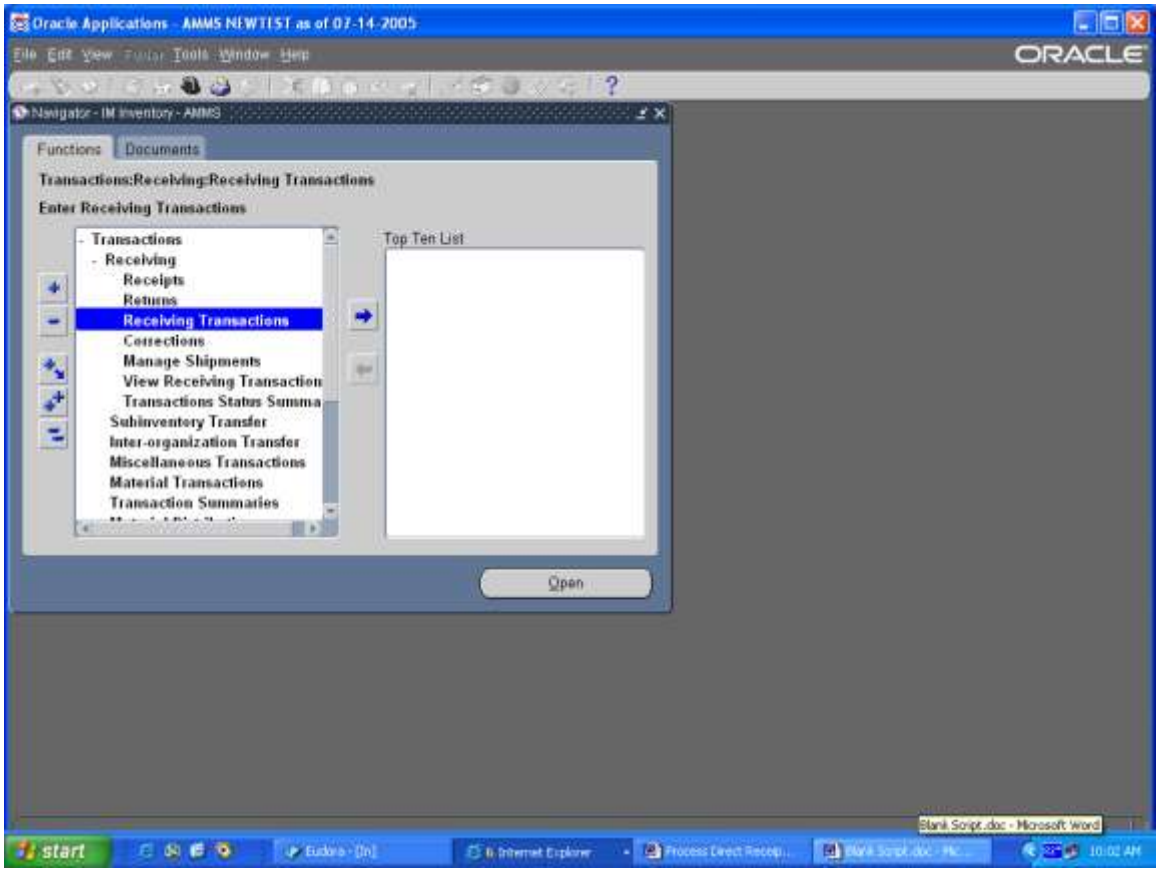
Step Description: Close all forms and return to the Receiving Inventory AMMS main menu

Expected Results: Receiving Inventory Main menu appears



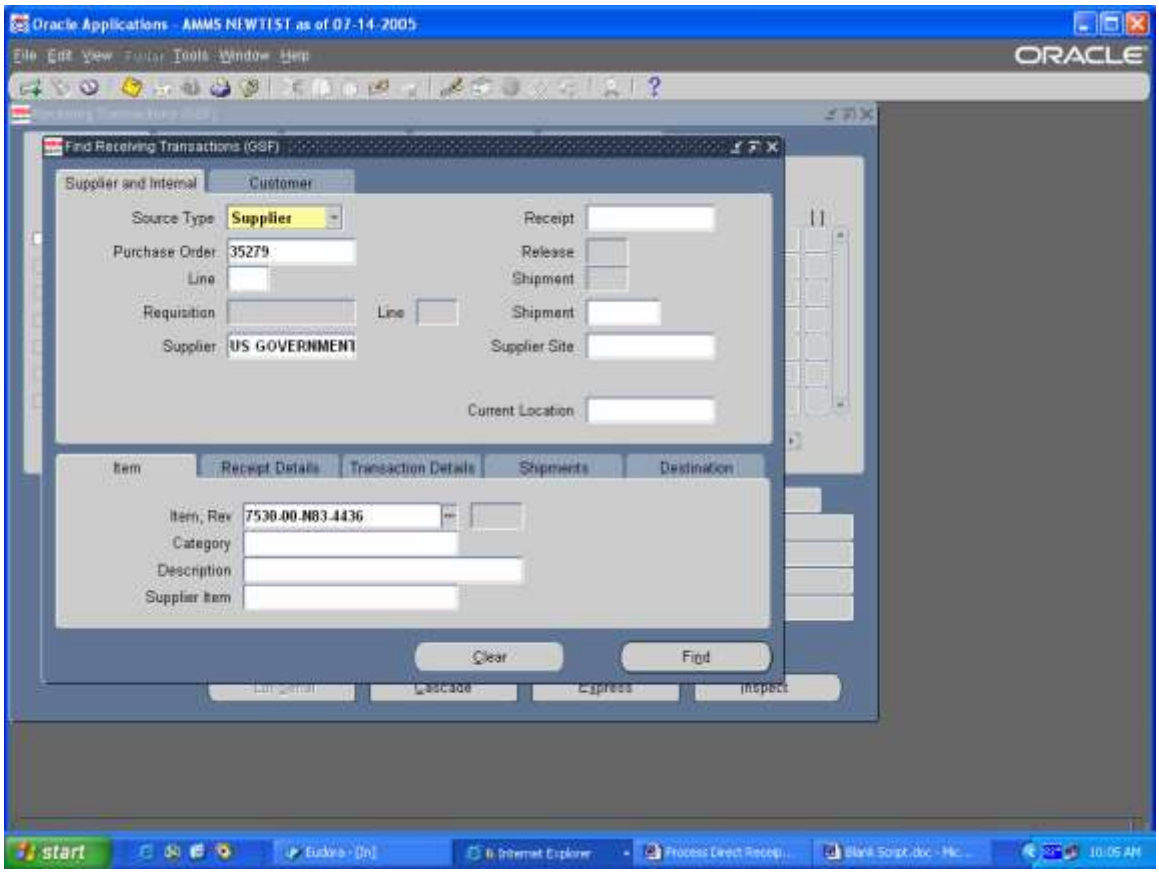
Step Description: From the Receiving Inventory AMMS main menu select Receiving Transactions, click on the Open button

Expected Results: Find Receiving Transactions window will appear



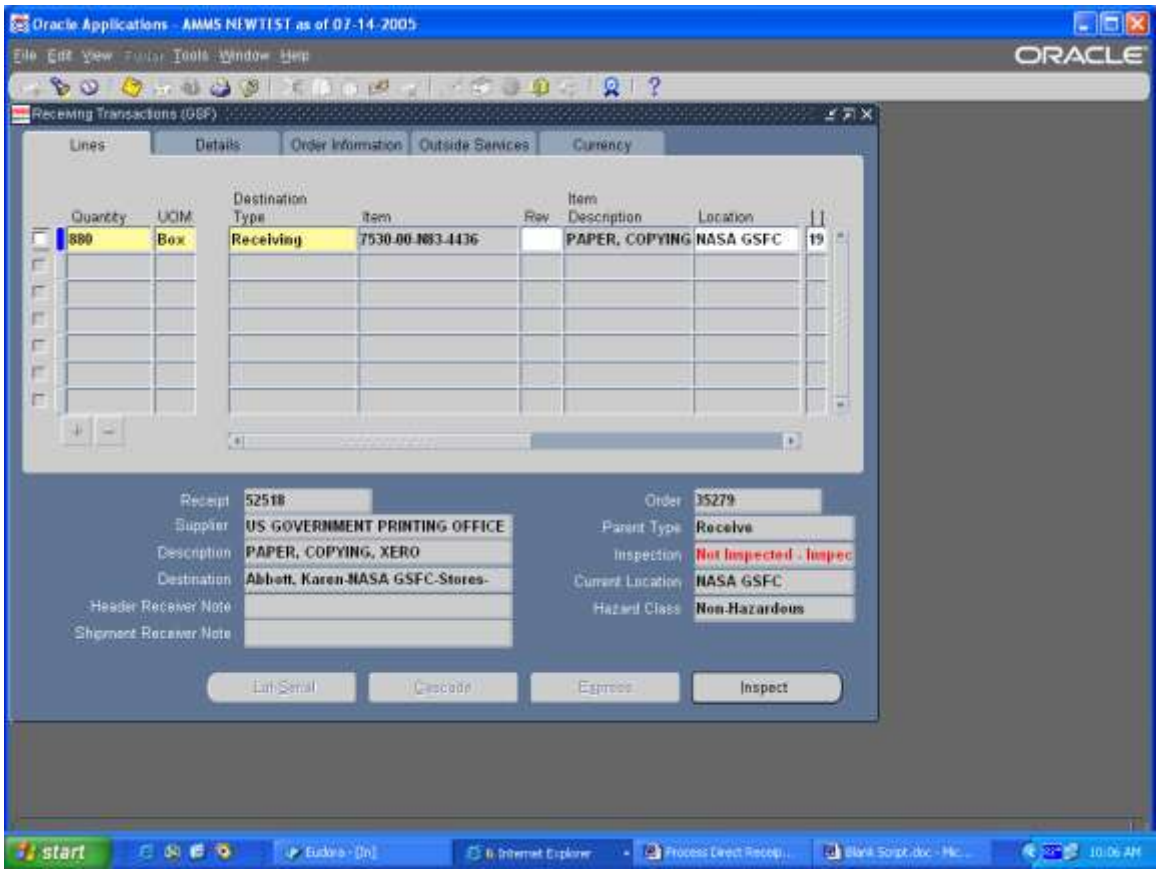
Step Description: At the Find Receiving Transactions window in the Purchase Order field enter the PO number for the material you are receiving, if known enter the stock number in the Item, Rev field click on the Find button

Expected Results: Receiving Transactions window will appear



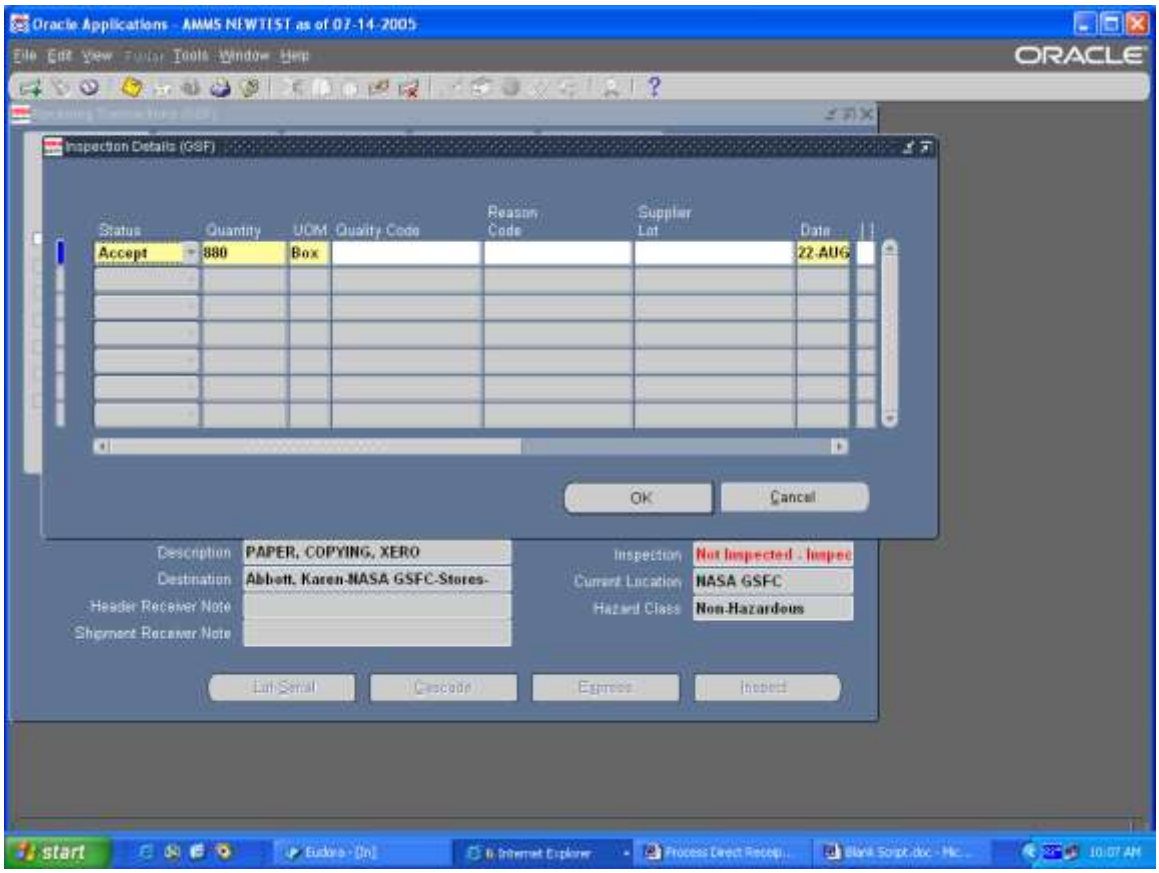
Step Description: In the bottom right hand corner, click on the Inspect button

Expected Results: Inspection Details window will appear



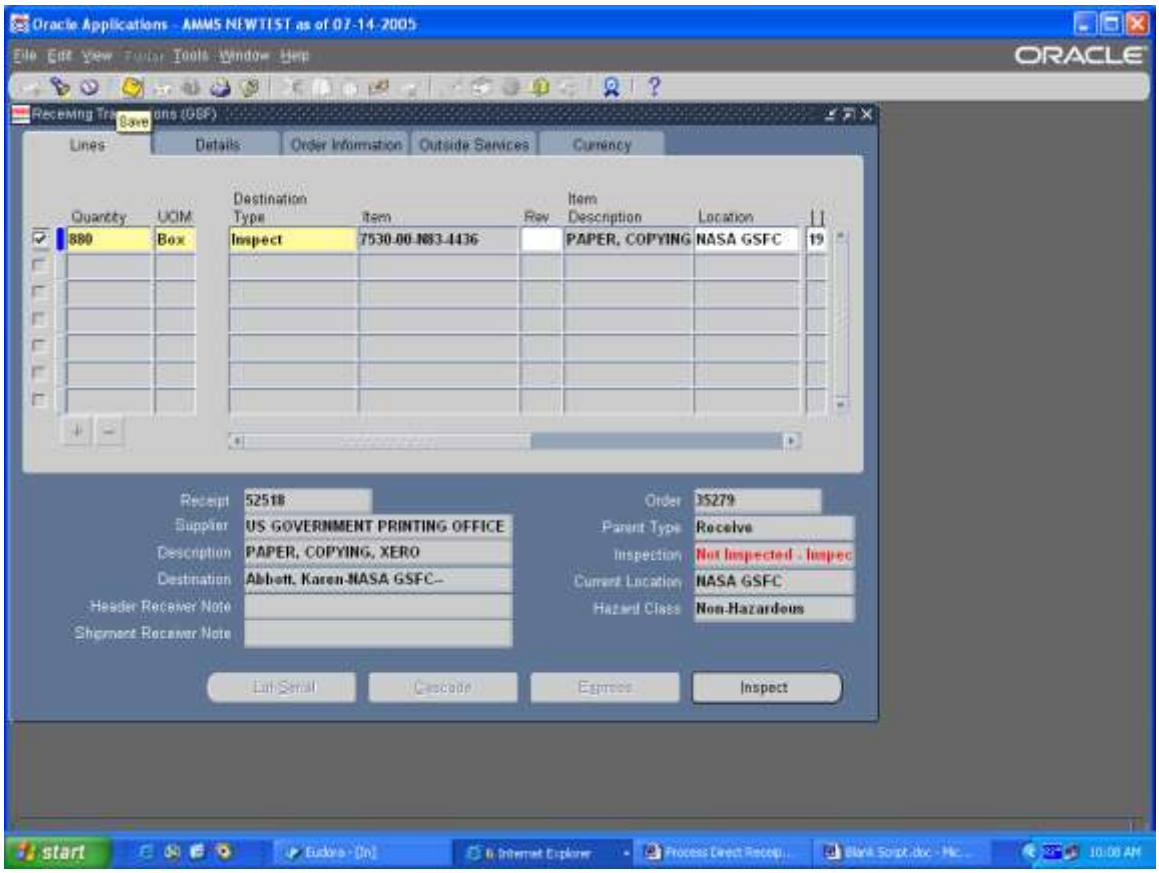
Step Description: At the Inspection Details window click on the OK button

Expected Results: Return to Receiving Transactions window



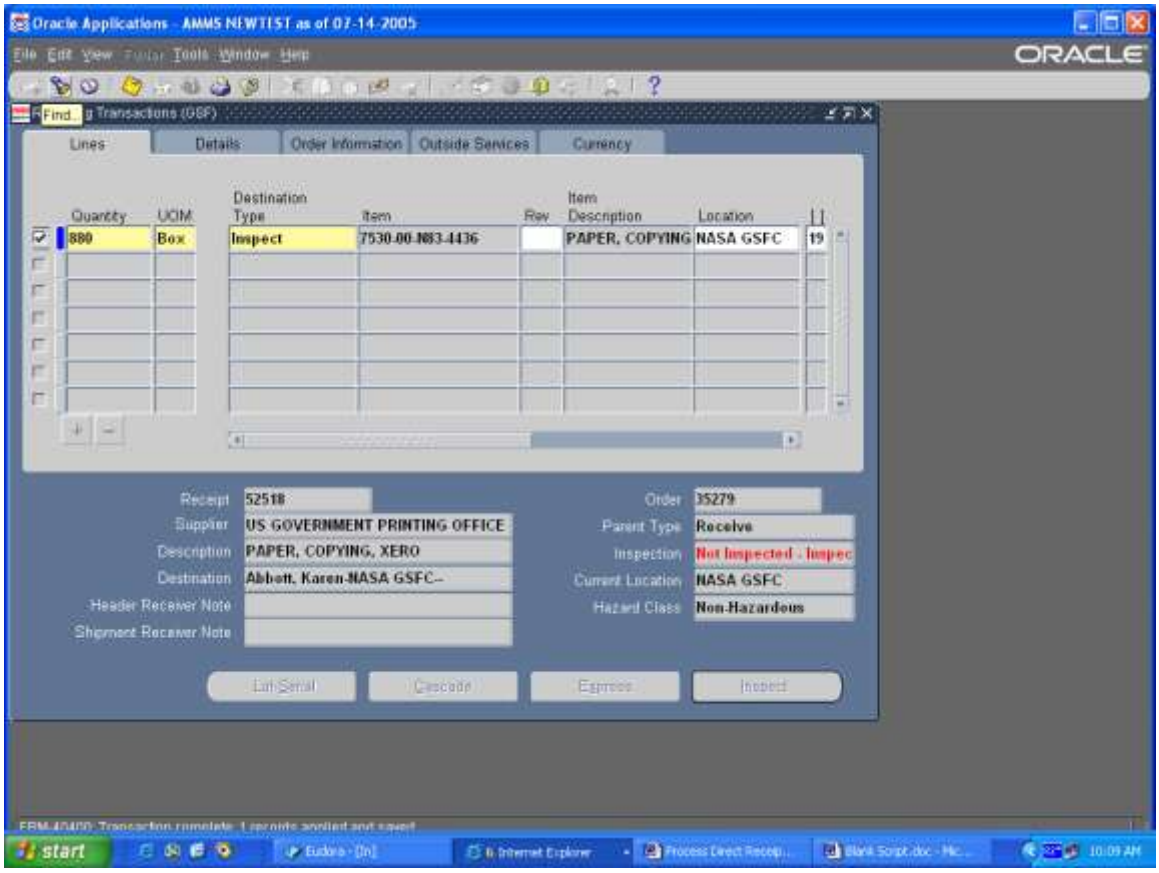
Step Description: Save your work

Expected Results: Transactions Complete and Applied Message



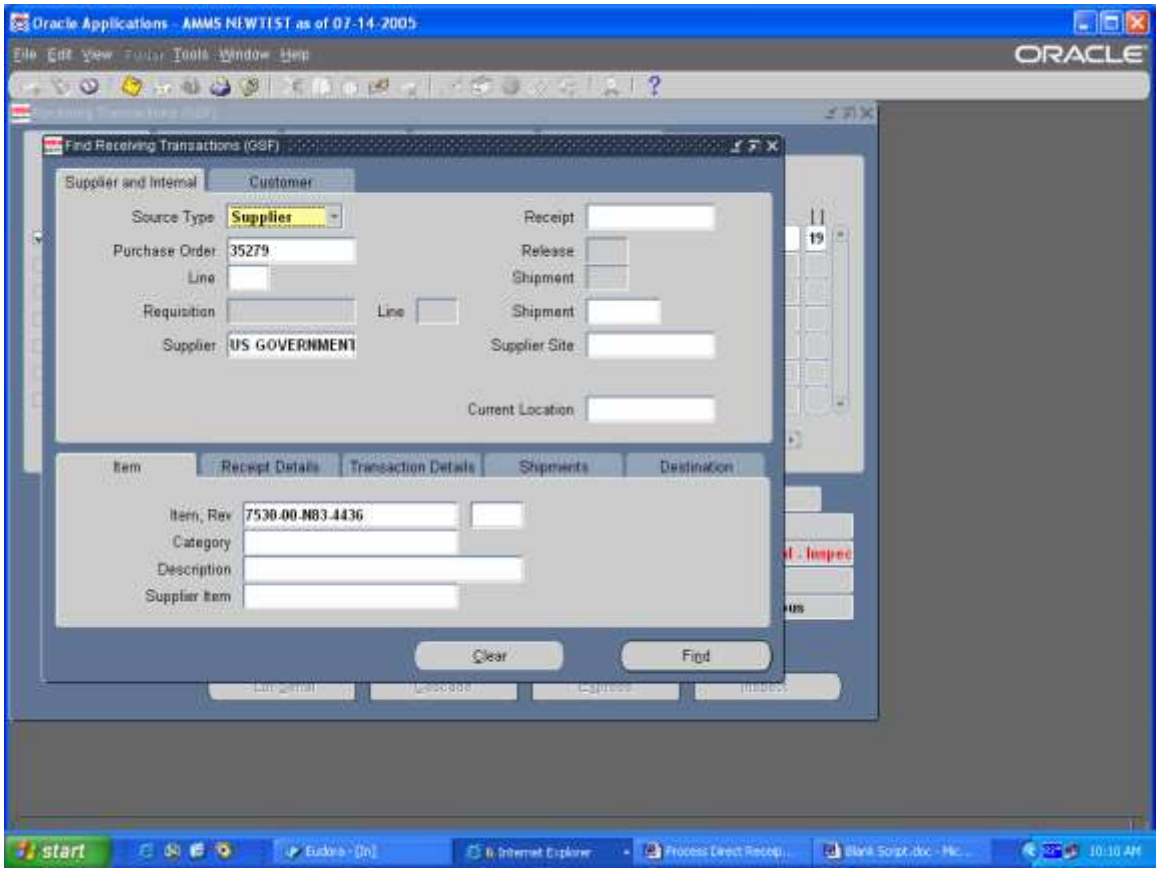
Step Description: From the toolbar select the flashlight to “refresh” your window

Expected Results: Return to the Find Receiving Transactions window



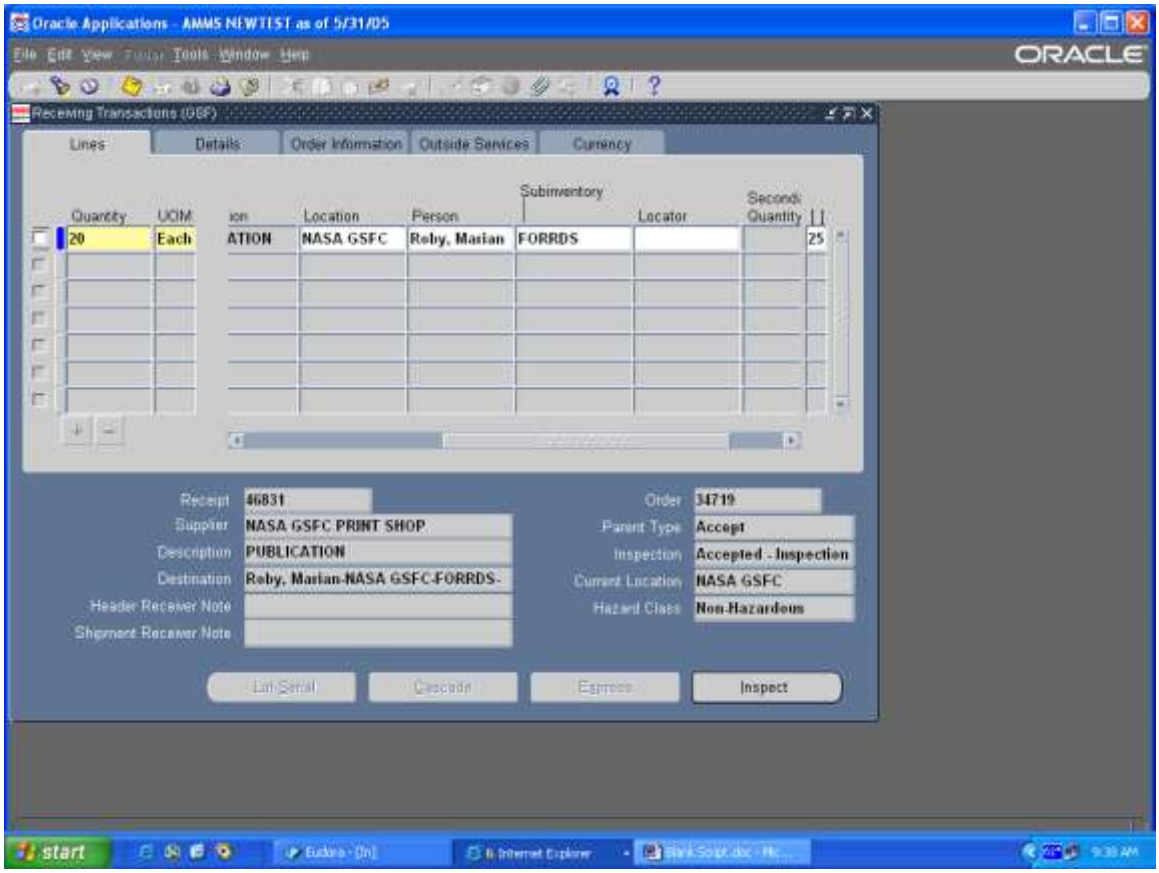
Step Description: The Purchase Order field should be populated with the PO number. Click on the Find button

Expected Results: Receiving Transactions window will appear



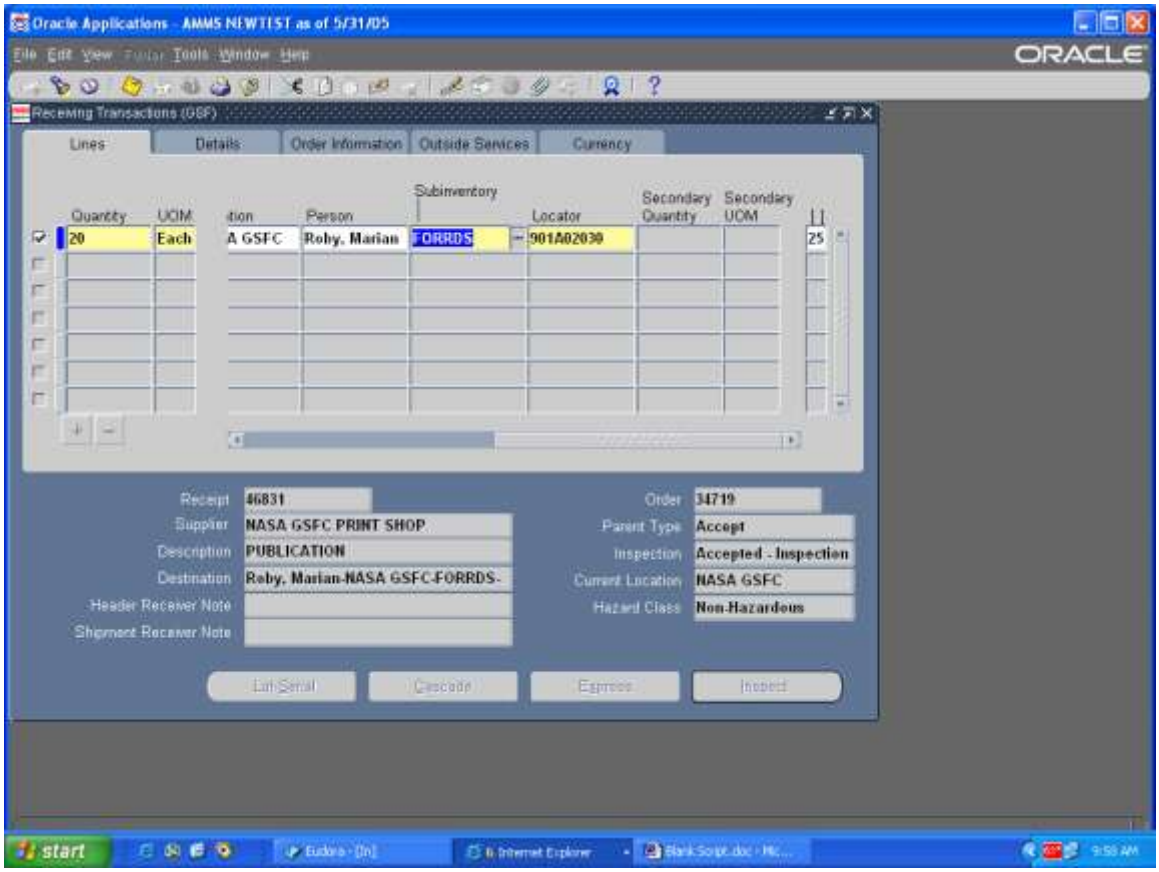
Step Description: Use the scroll bar move to the right until you see the Sub Inventory field, the Sub Inventory should already be populated, if not click on the List of Values (LOV) and select the appropriate Sub Inventory. NEVER DELIVER MATERIAL TO THE STAGING SUB INVENTORY.

Expected Results: Field will be populated



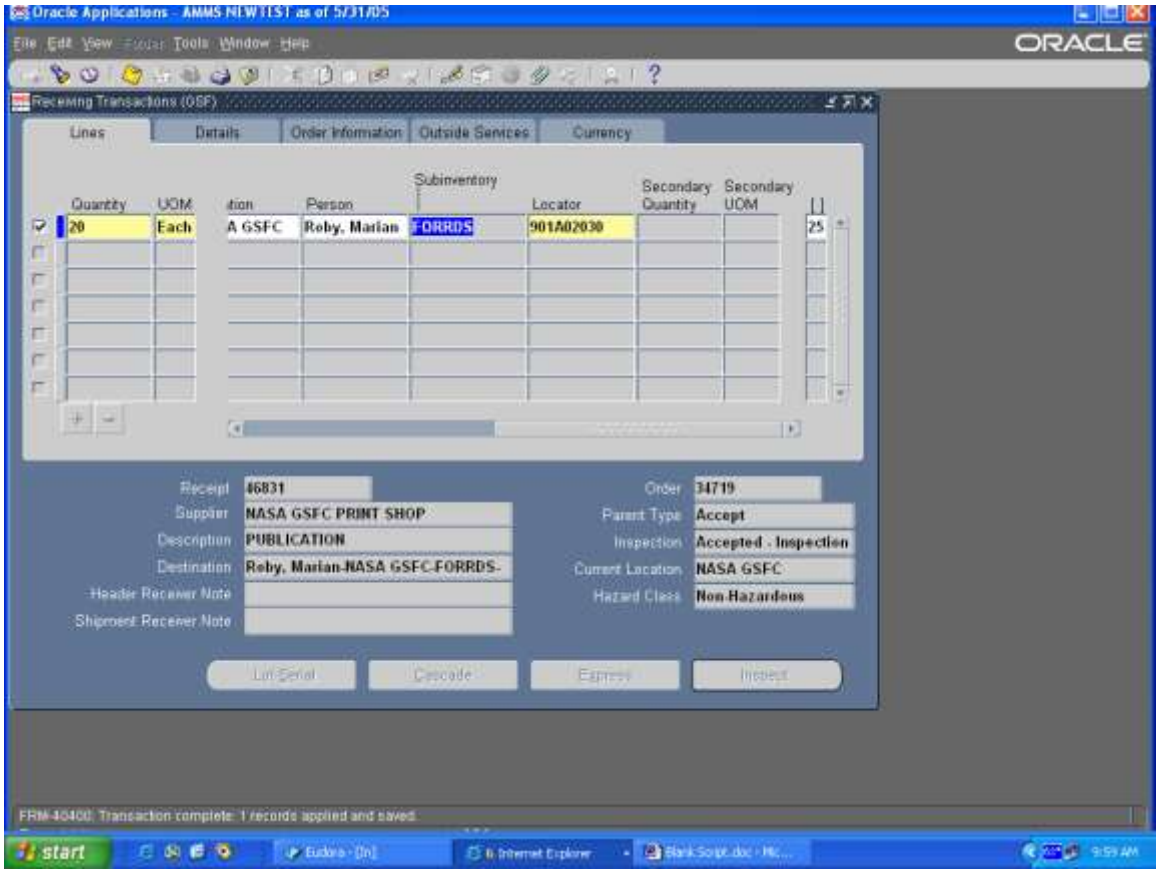
Step Description: Go to the Locator field, enter the locator that the material is physically located in.

Expected Results: Field will be populated



Step Description: Save your work

Expected Results: Transactions Saved and Applied message



Close all forms transactions complete

AMMS TRAINING SCRIPT
Rejecting Material

Purpose

The purpose of this training script is to show how aq Purchase order is rejected in AMMS

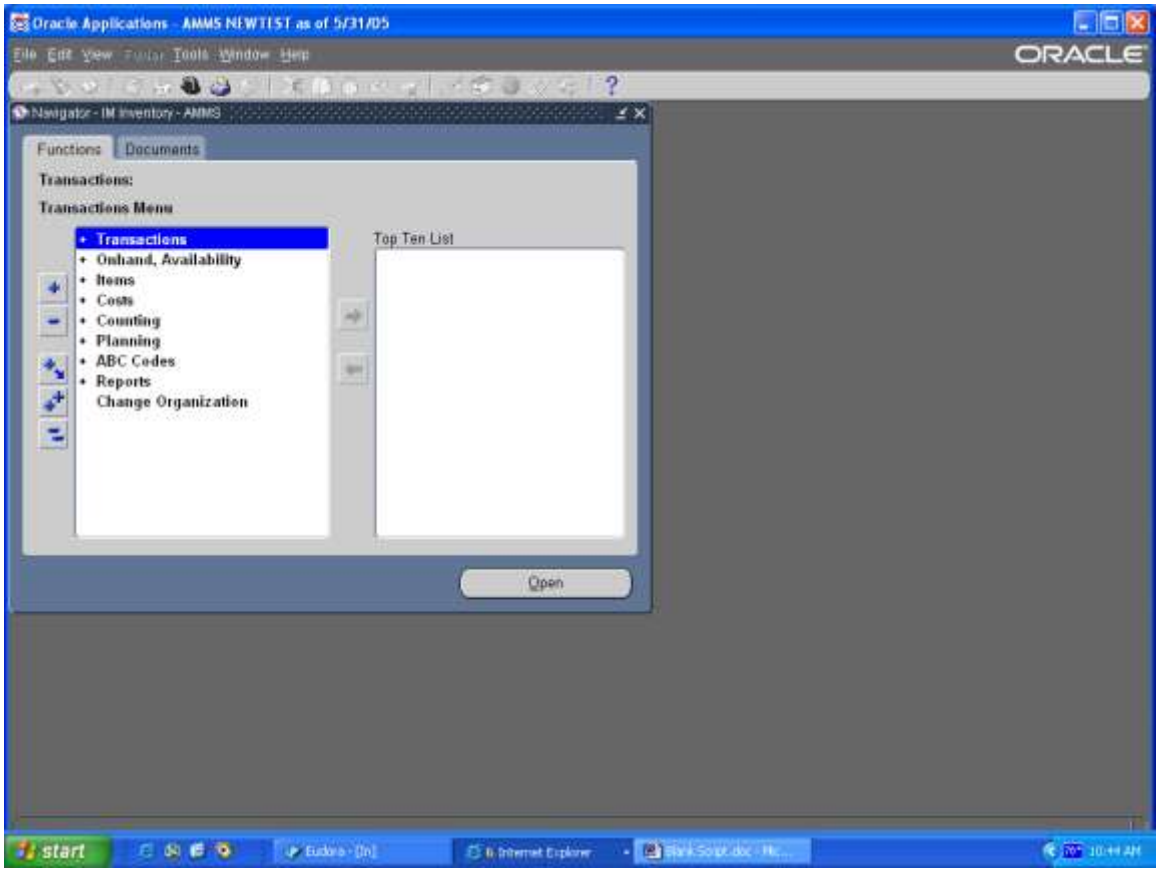
Audience

Inspectors, Material Coordinators, and Supply Technician Team Leads

Prepared By	Theresa Coulson
Creation Date:	06/21/2005
Document Name	Rejecting Material.doc
Version	2
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Receiving.	

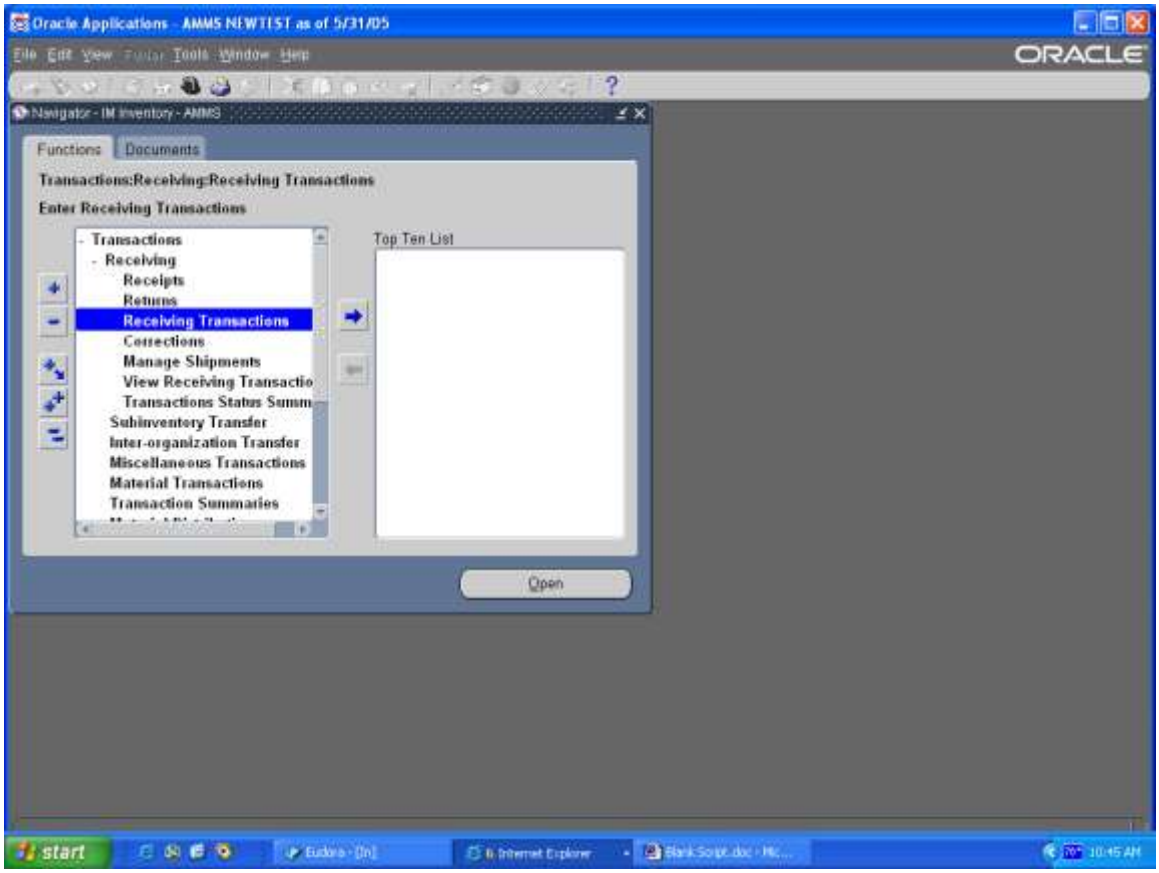
Step Description: Sign onto Oracle and select the IM Inventory AMMS responsibility

Expected Results: IM Inventory AMMS main menu will appear



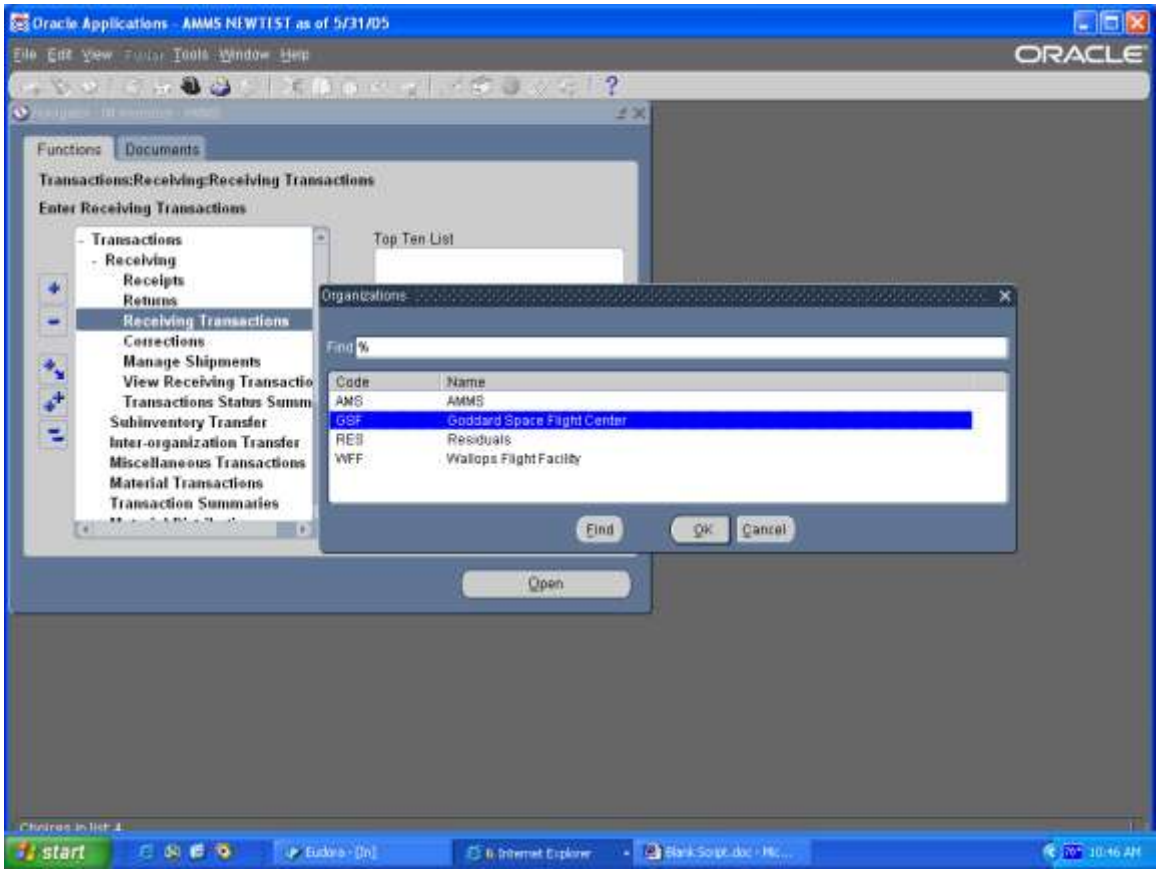
Step Description: From the IM Inventory AMMS main menu select Transactions > Receiving > Receiving Transactions click on the open button

Expected Results: Organization window will appear



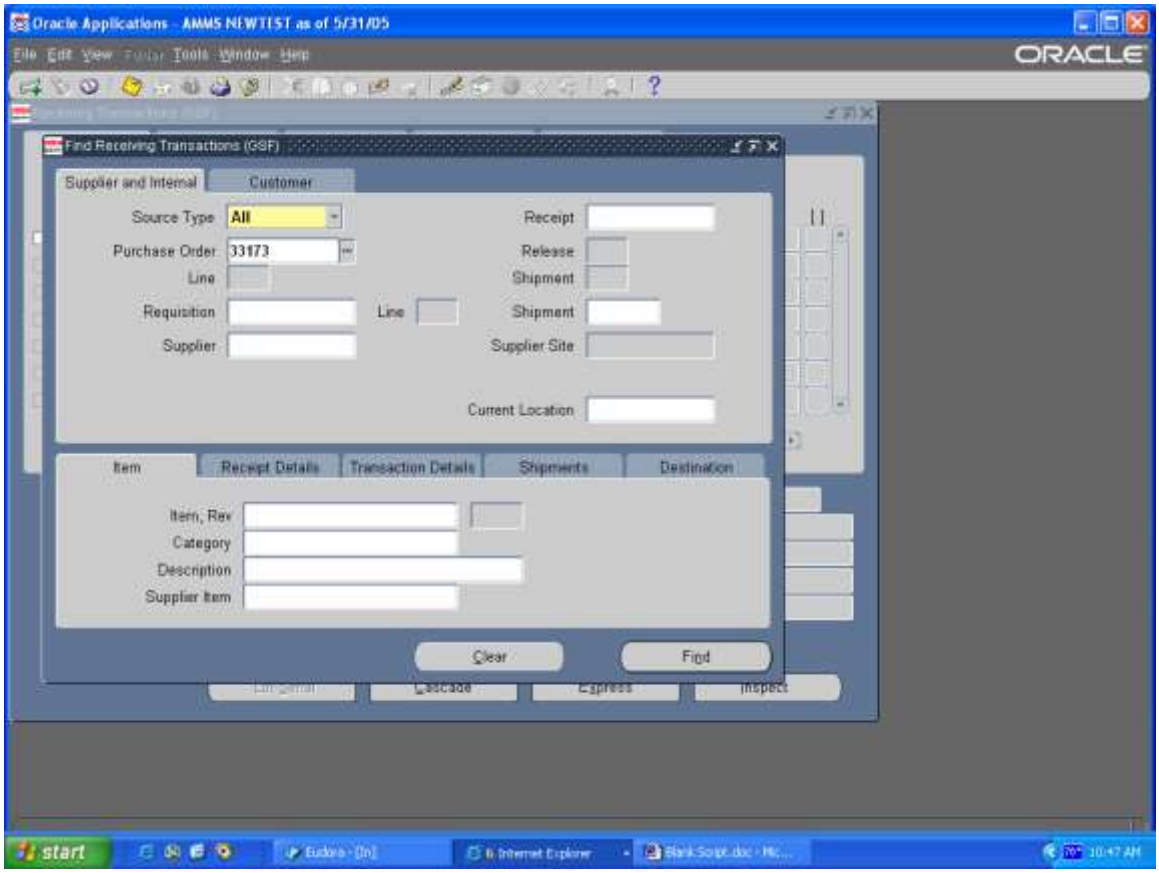
Step Description: Choose the appropriate organization GSF for Goddard or WFF for Wallops click the OK button

Expected Results: Find Receiving Transactions window will appear



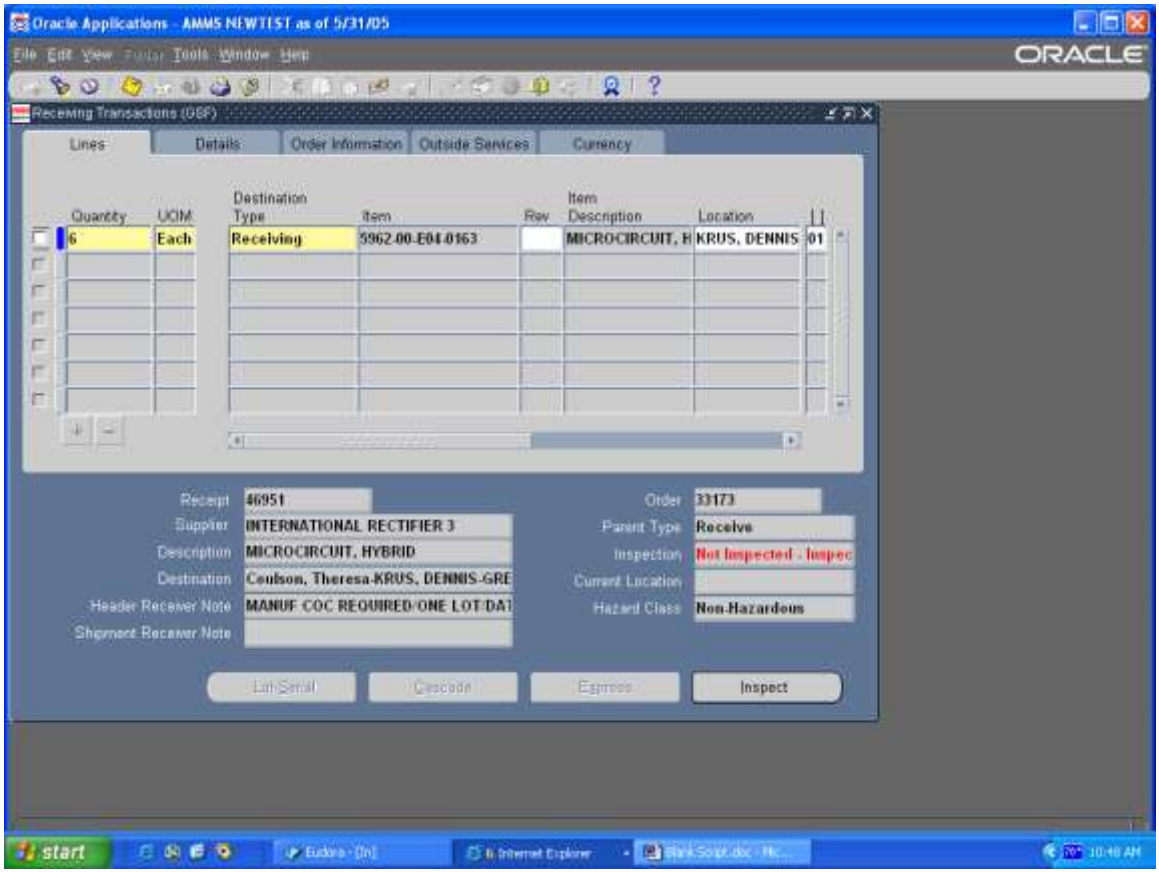
Step Description: In the Purchase Order field enter the purchase order that you want to reject, click on the Find button

Expected Results: Receiving Transactions window will appear



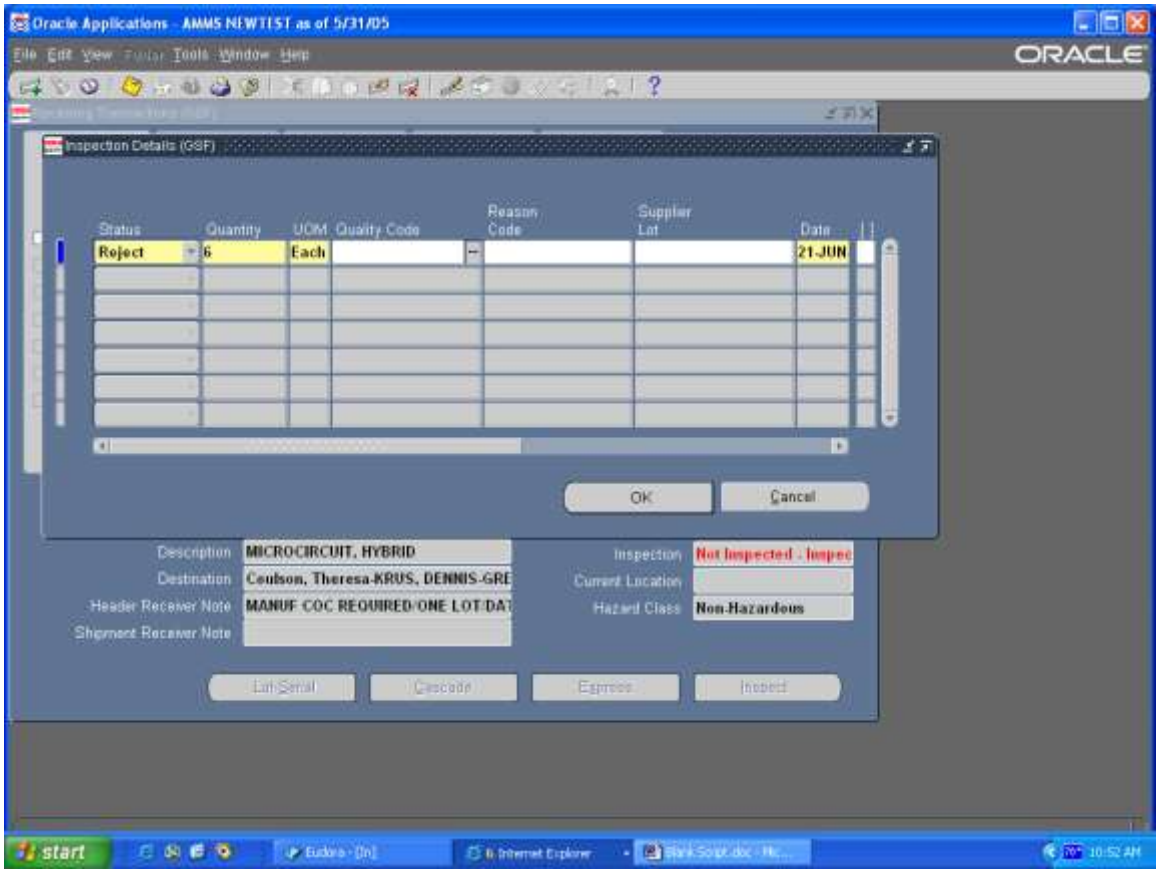
Step Description: Verify that all of the data is correct, PO number, item number. Click on the Inspect button at the bottom right of the screen

Expected Results: Inspection Details window will appear



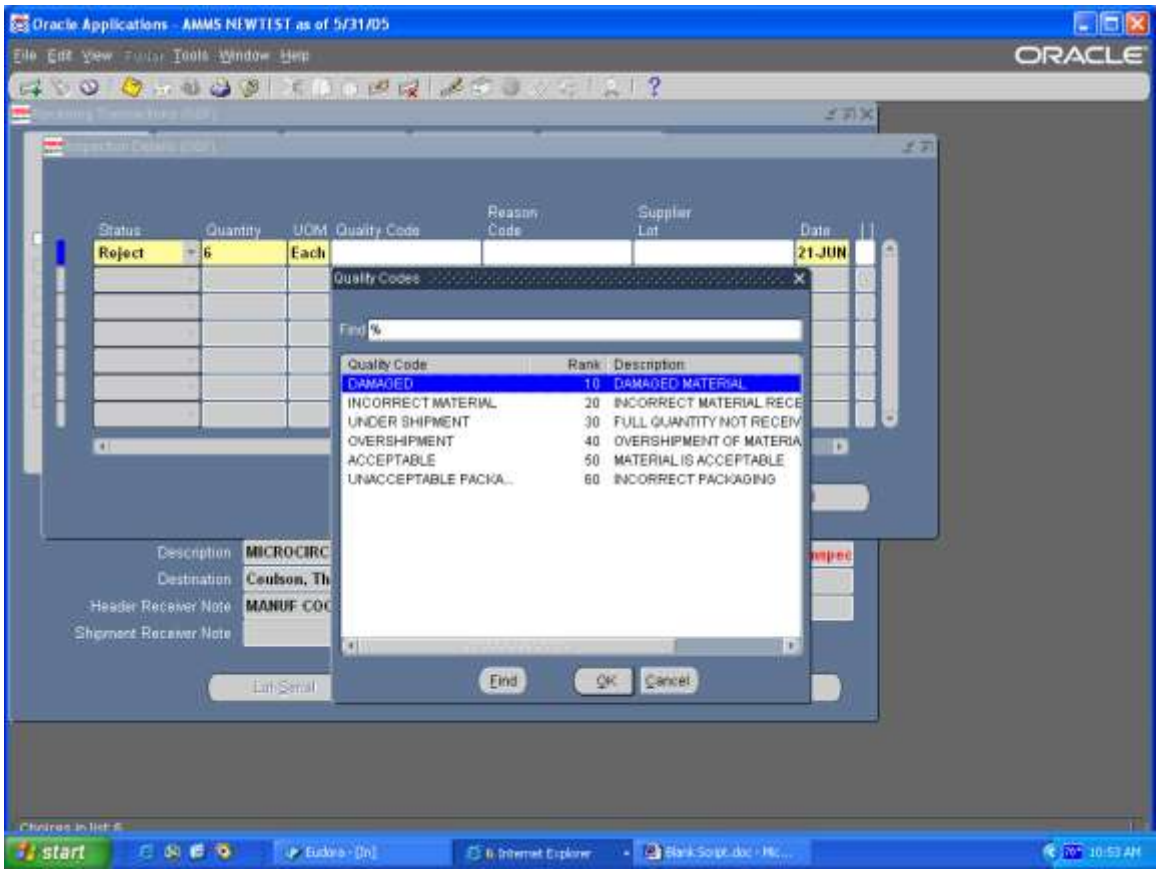
Step Description: At the Inspection Details window in the Status field click on the arrow, then select Reject from the options

Expected Results: Status field will have Reject



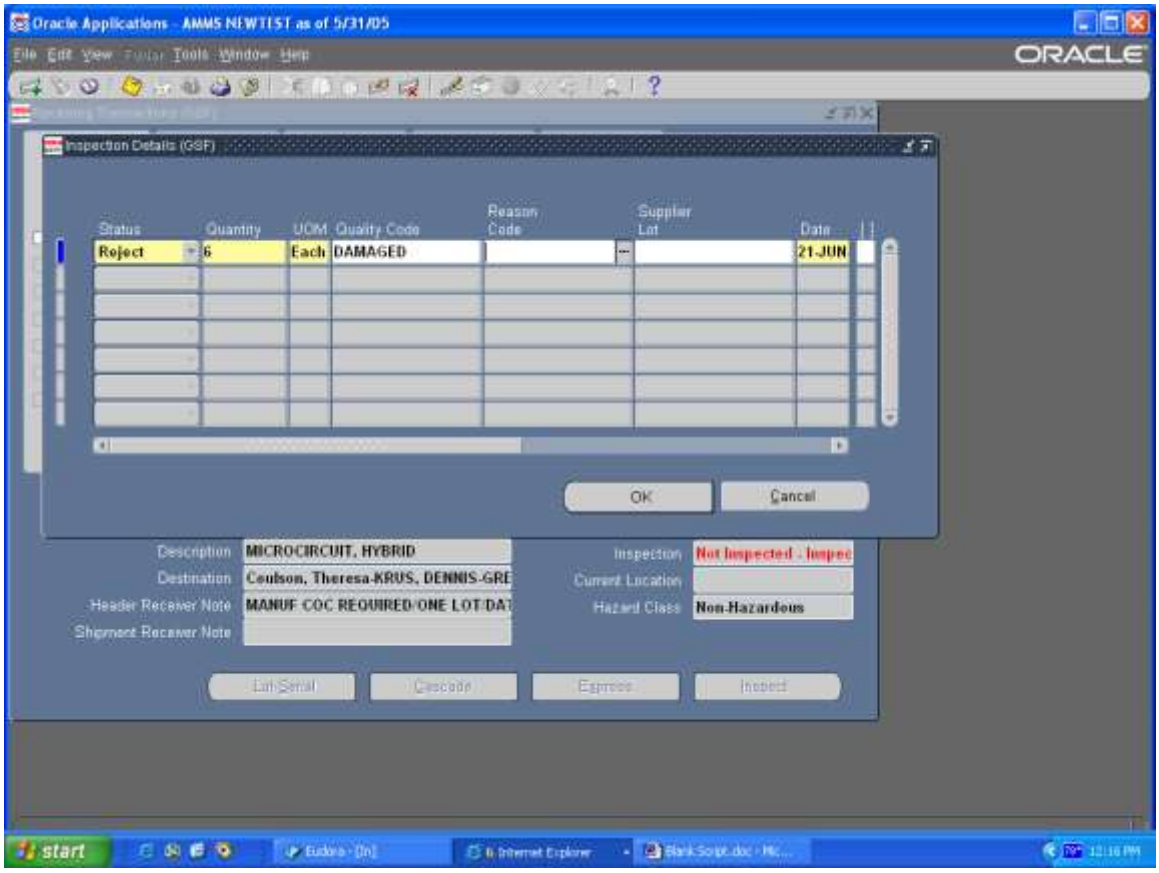
Step Description: Still in the Inspection Details window go to the Quality Code field and click on the List of Values, select the best reason that applies to why you are rejecting this material, click Ok

Expected Results: Field will be populated



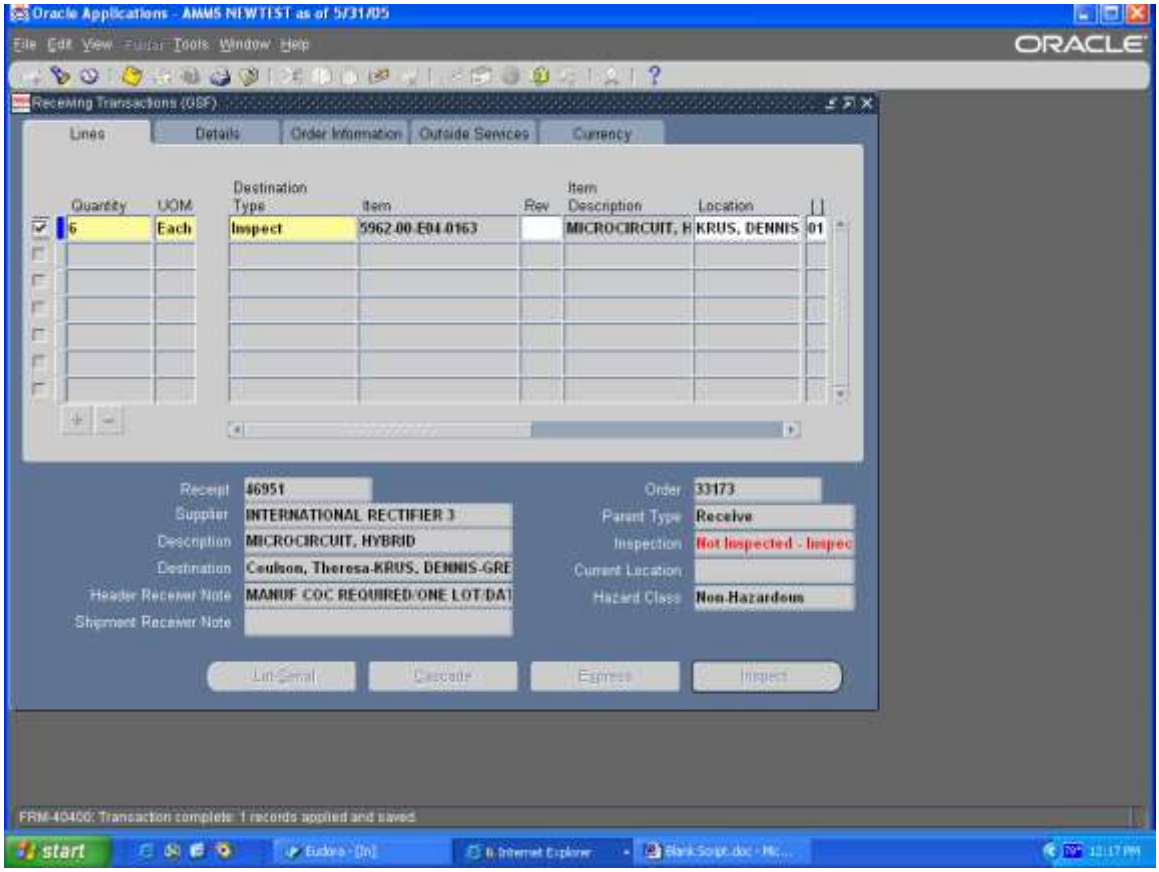
Step Description: Click on the OK button at the Inspection Details window

Expected Results: Return to Receiving Transaction window



Step Description: Save your work

Expected Results: Transaction Saved and Applied message



Close all forms.

NOTE: You are still required to write up a Receiving Discrepancy form and forward to the appropriate Material Manager for corrective action.

AMMS TRAINING SCRIPT
View Receiving Transactions

Purpose

The purpose of this training script is to walk you though looking at a Purchase Order that has been received

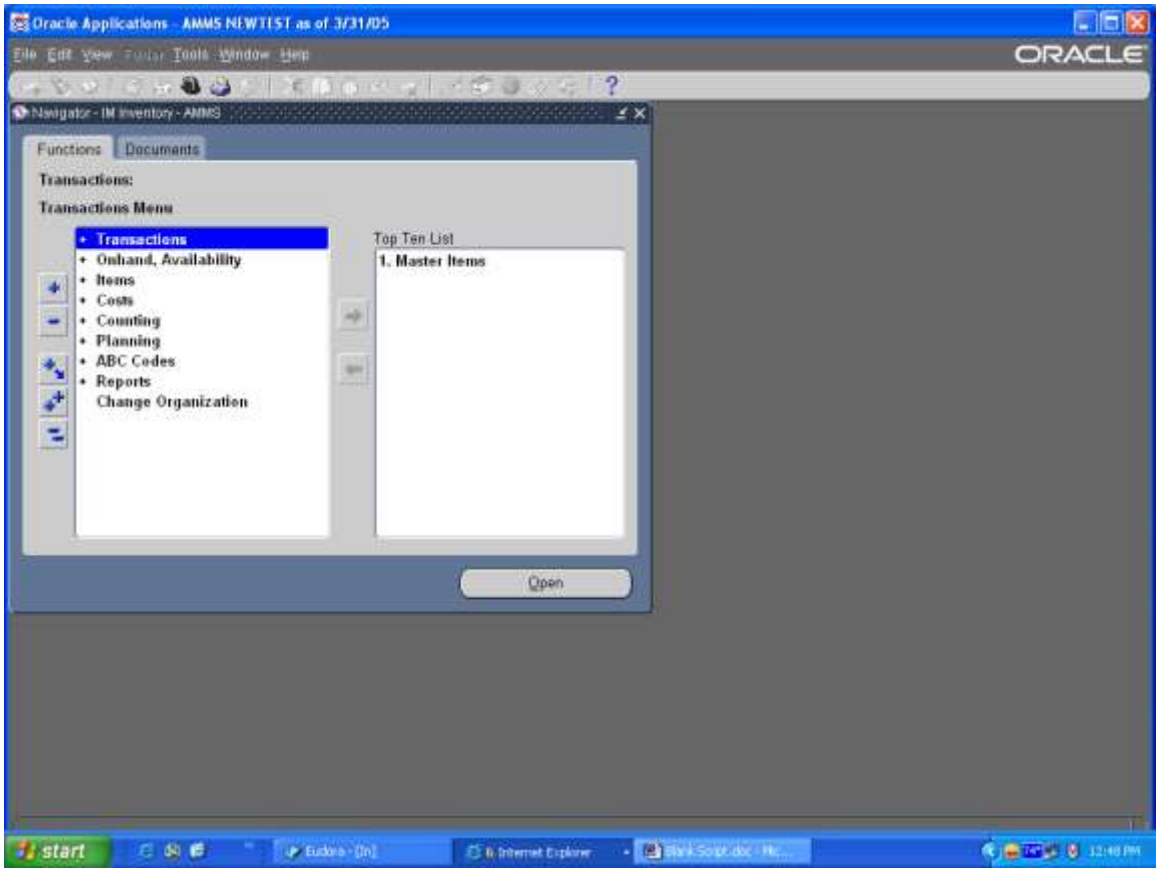
Audience

Supply Technicians, Supply Team Leads, and Material Coordinators

Prepared By	Theresa Coulson
Creation Date:	04/07/2005
Document Name	View Receiving Transactions.doc
Version	2
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Receiving.	

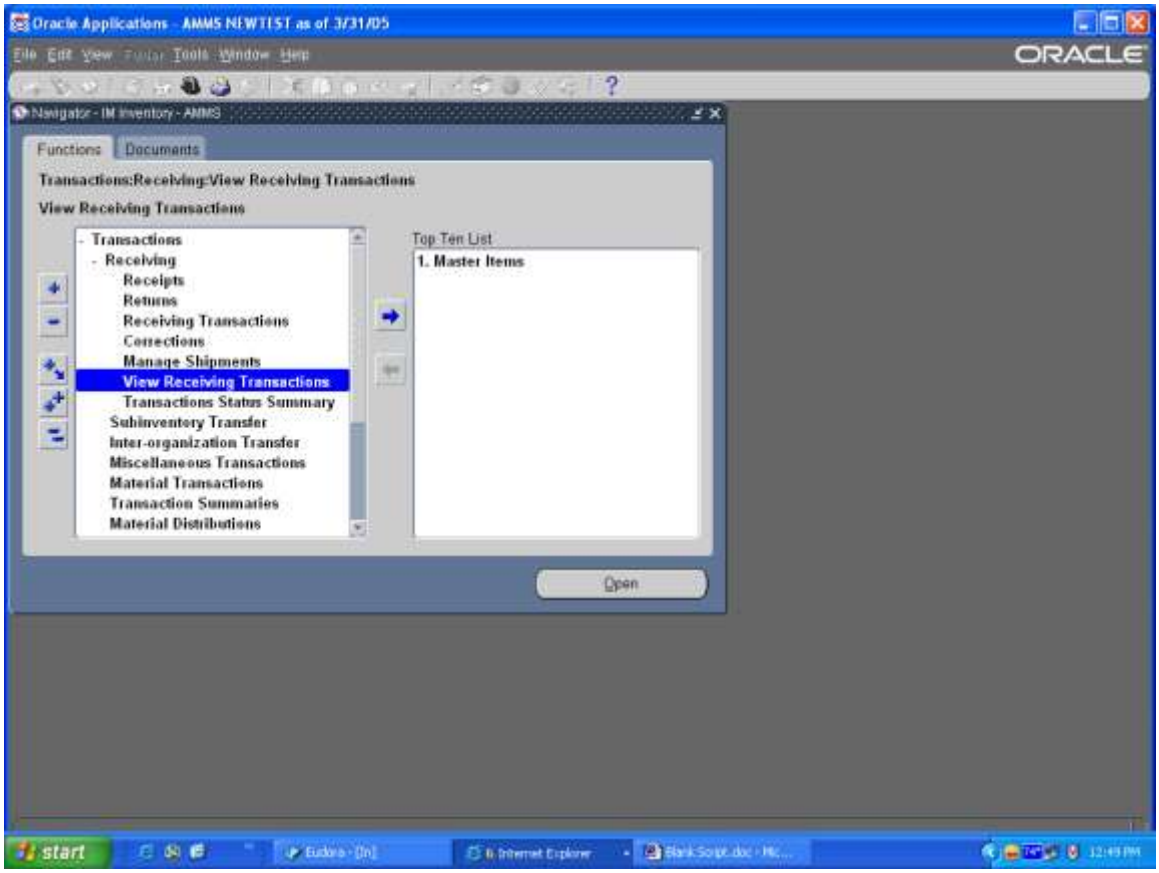
Step Description: Sign onto Oracle and select the IM Inventory AMMS responsibility

Expected Results: IM Inventory main menu will appear



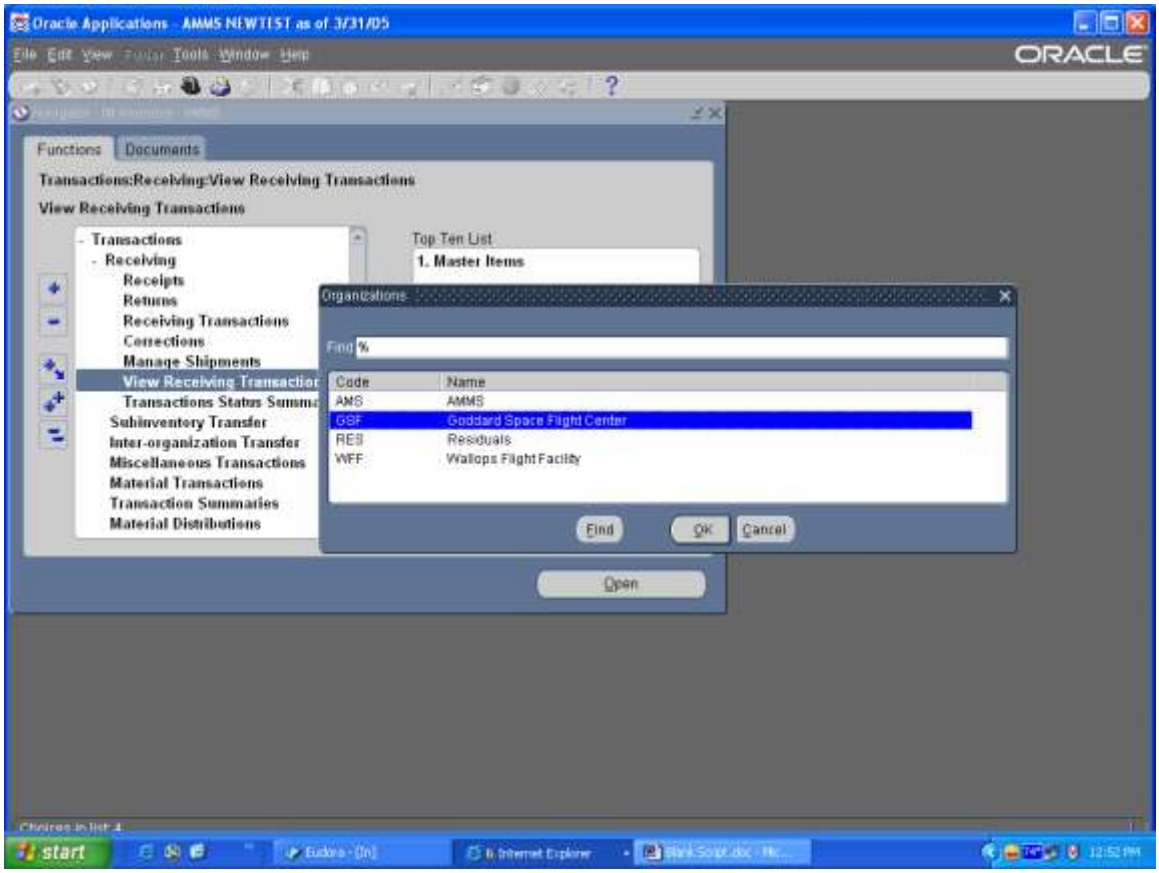
Step Description: From the IM Inventory AMMS main menu select Transactions > Receiving > View Receiving Transactions, click on the open button

Expected Results: The organization window will appear



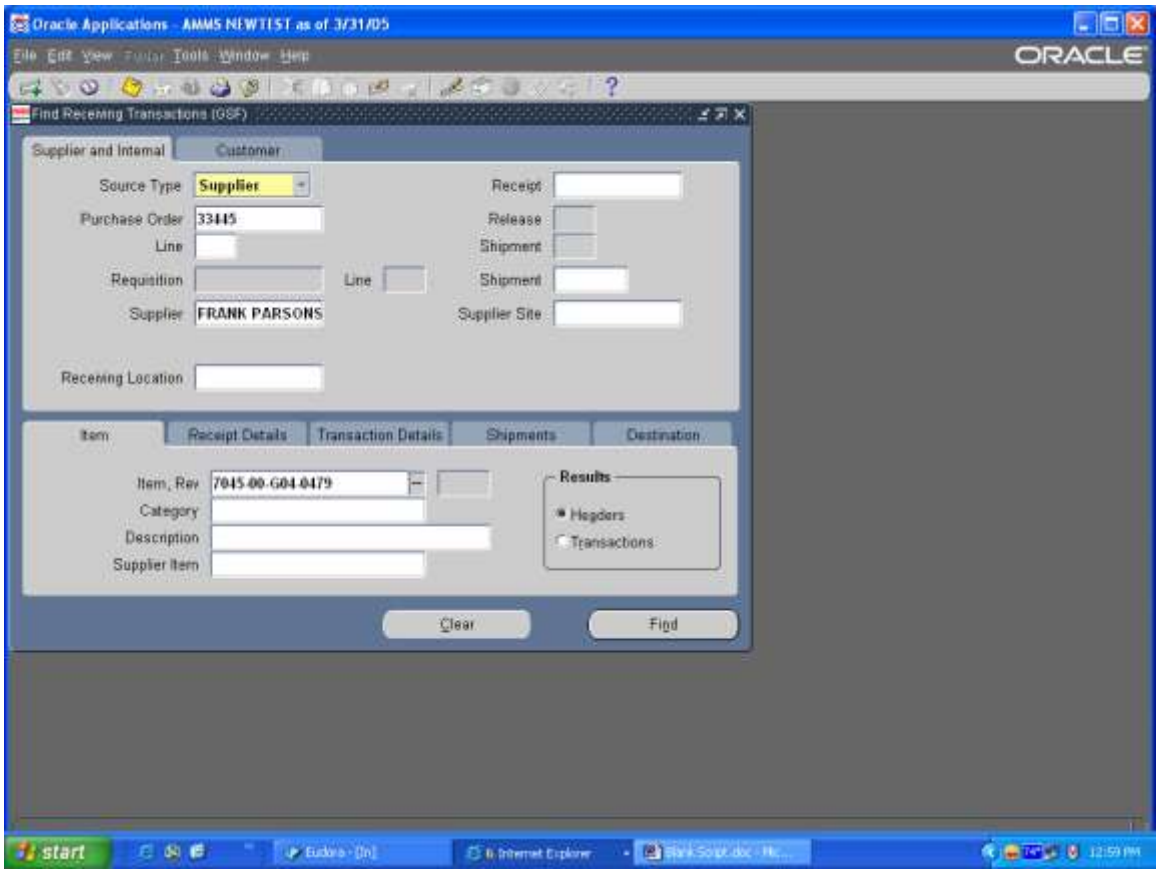
Step Description: Select the appropriate organization, GSF for Goddard or WFF for Wallops, click OK

Expected Results: Find Receiving Transactions window will open



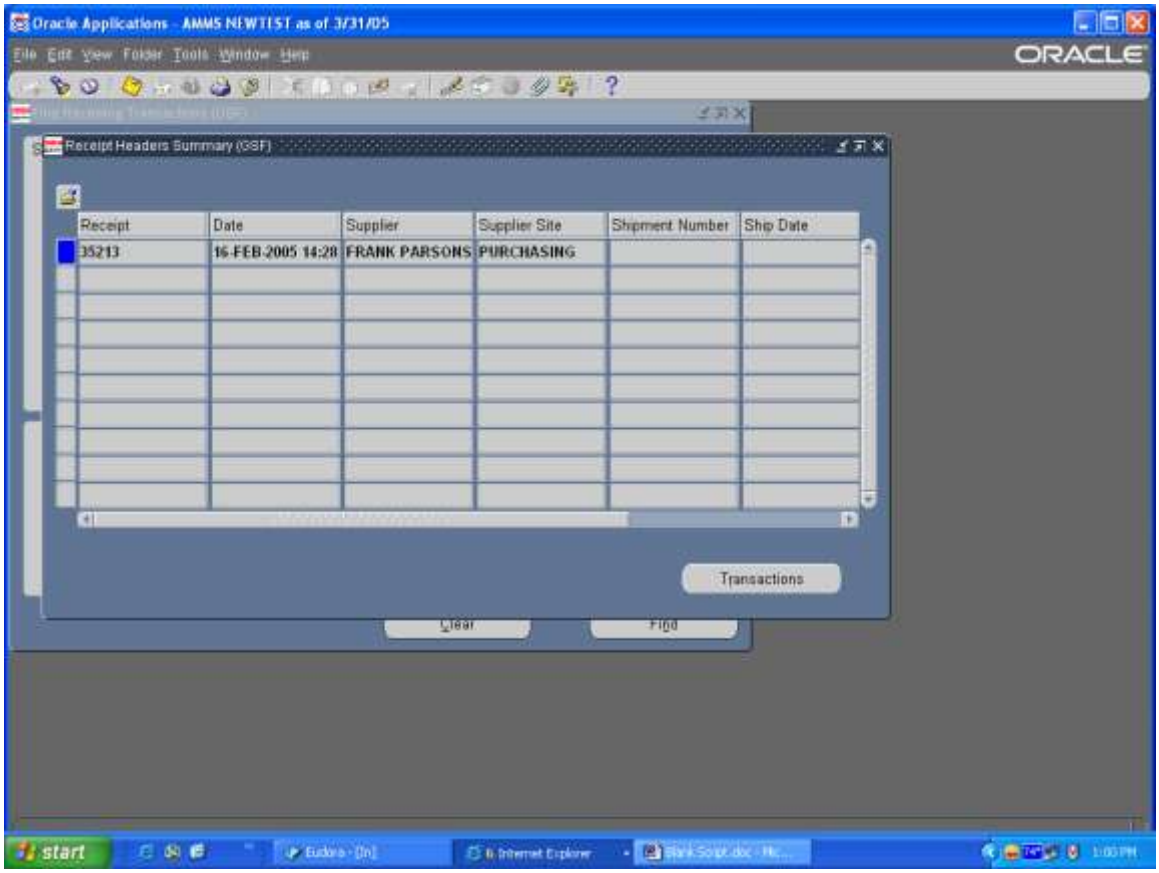
Step Description: In the Purchase Order field enter the Purchase Order number for the material, then at the bottom of the form, in the Item, Rev field enter the Item Number (Stock Number), click on the Find button

Expected Results: Receiving Headers Summary window will open



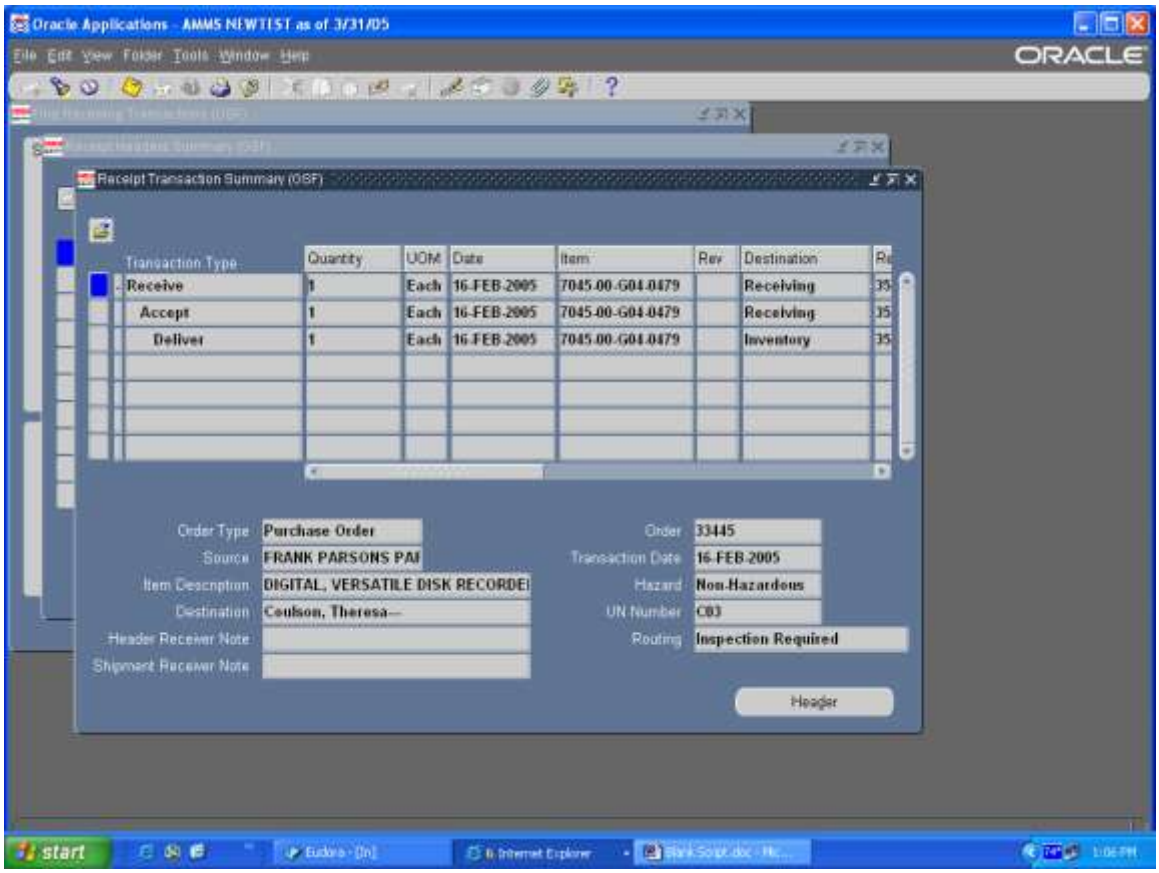
Step Description: Click on the Transactions button at the bottom right of the Receiving Headers Summary window

Expected Results: Receiving Transactions Summary window will open



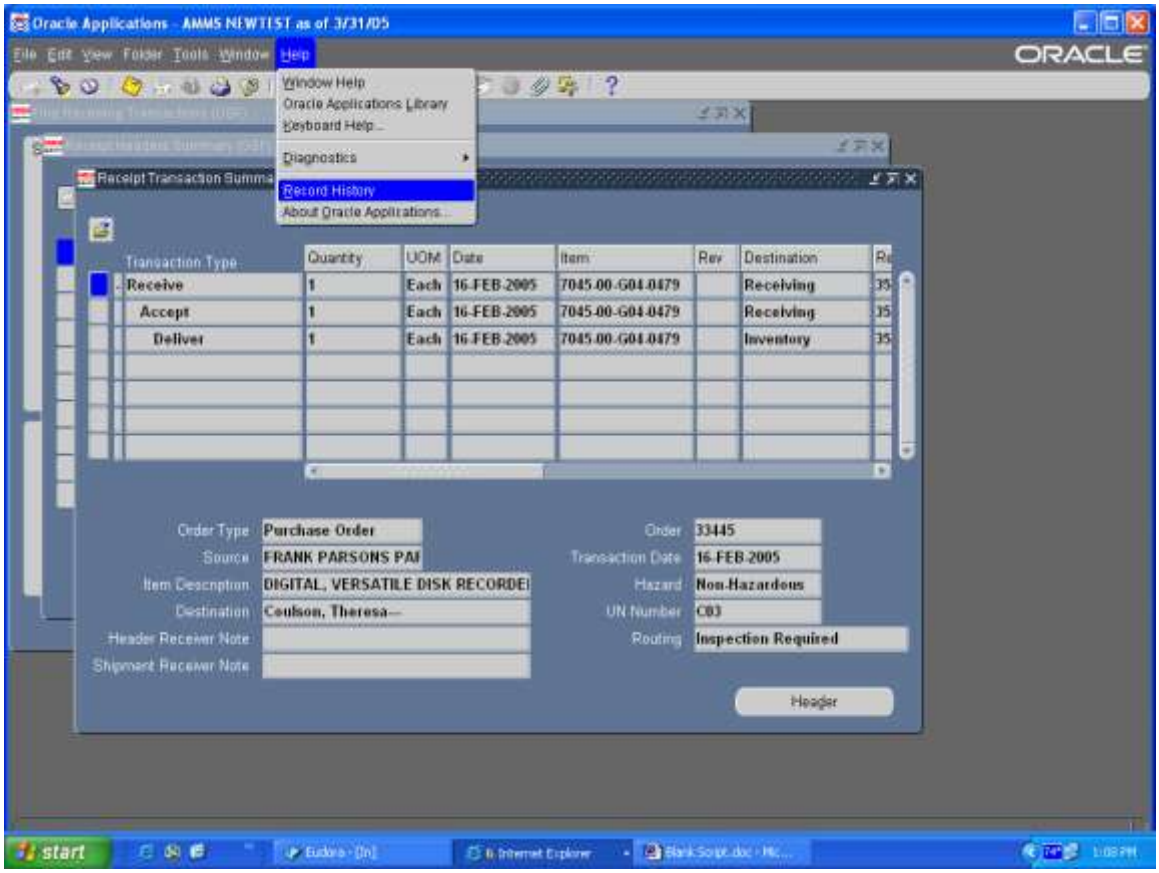
Step Description: The Receiving Transactions Summary window will give you details about the receipt that was processed. It will tell you if all three transactions have been processed, the dates the material was received, and the quantity received.

Expected Results: Window will have data



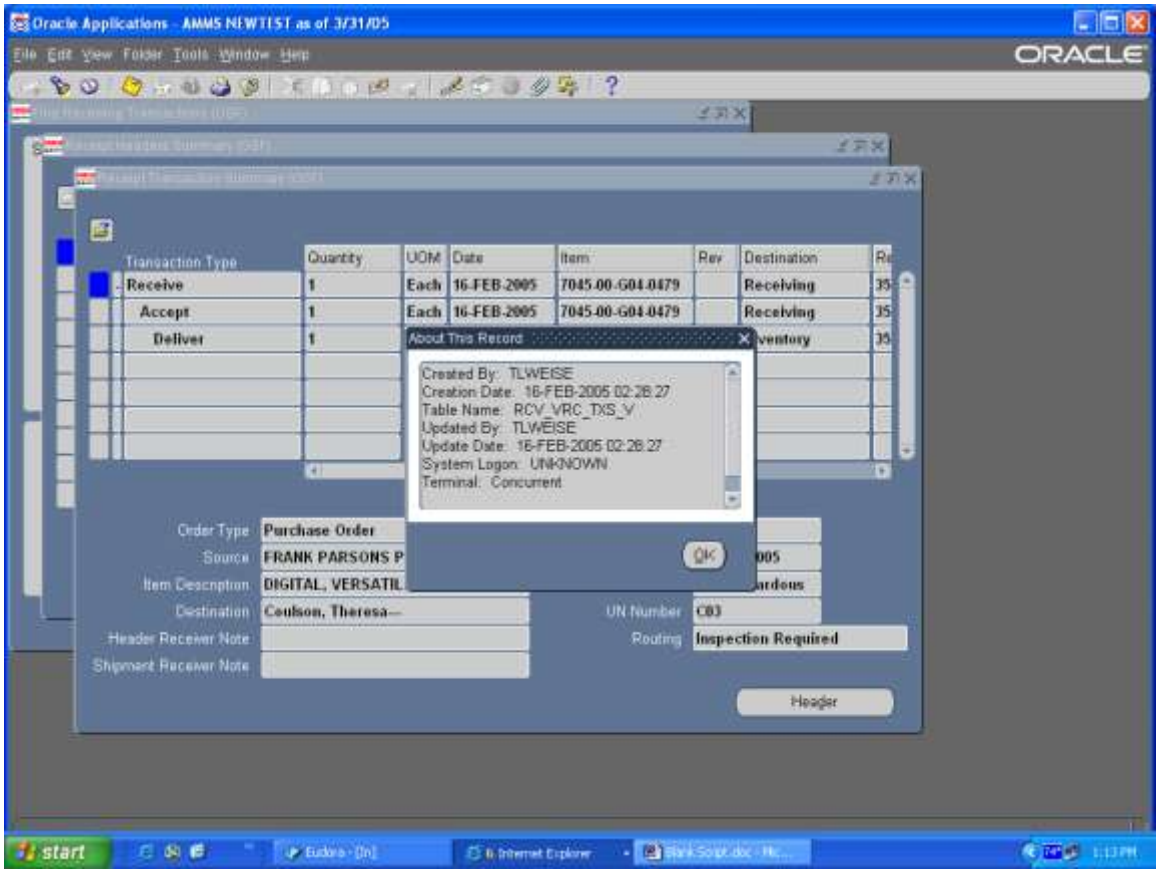
Step Description: To see who specifically processed the transaction, from the Toolbar select Help > Record History

Expected Results: About this Record window will open



Step Description: The About this Record window will tell you who processed the receipt and what time: to close this window click OK

Expected Results: About this Record window will close:



Note: To view another receipt summary use the Flashlight from the Toolbar and the Find Receiving Transactions window will appear

AMMS WAREHOUSE TRAINING SCRIPTS

AMMS TRAINING SCRIPT

Auto Create and Backorder Item on Pick Slip

Purpose

The purpose of this training script is to explain how to Auto Create a delivery number, and backorder lines on a pick slip.

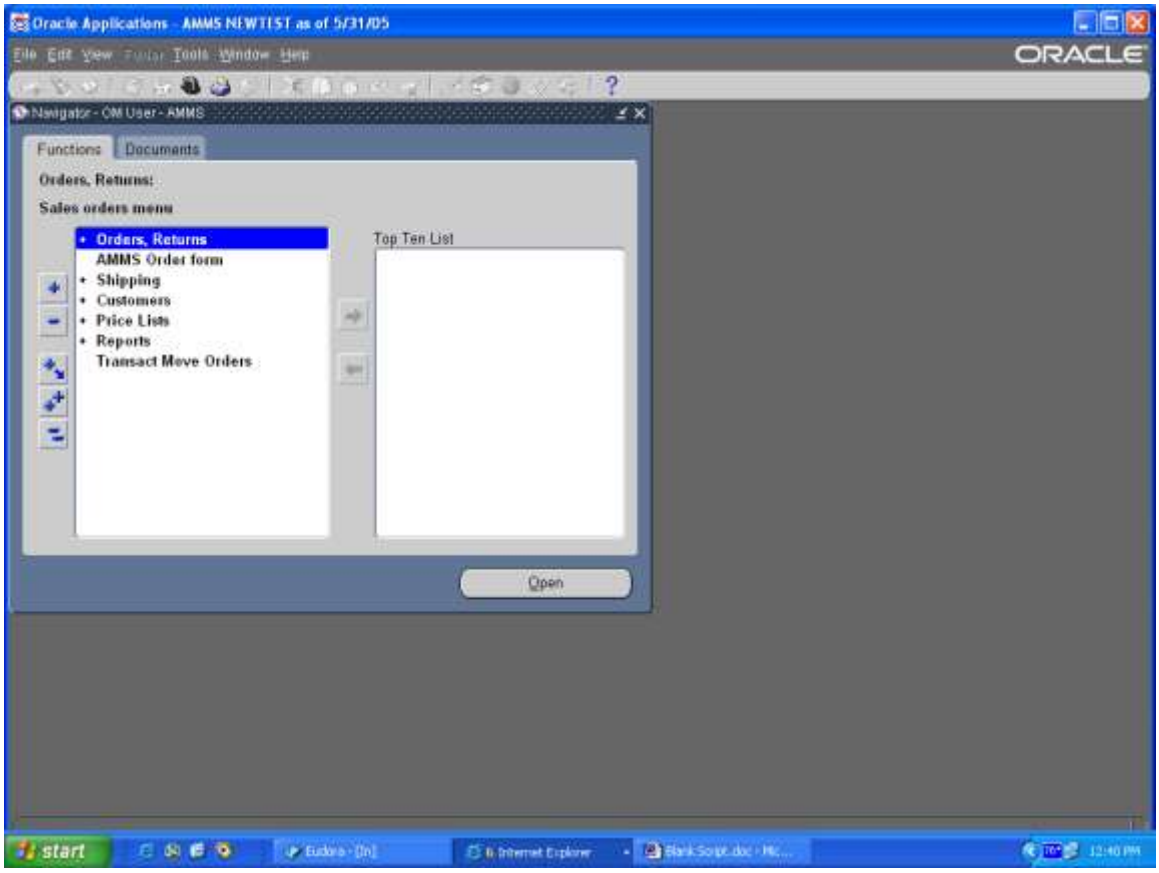
Audience

Warehousemen, Material Coordinators, and Supply Technicians

Prepared By	Theresa Coulson
Creation Date:	06/01/2005
Document Name	Auto Create delivery and Backorder item on Pick Slip.doc
Version	2
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Warehouse\.	

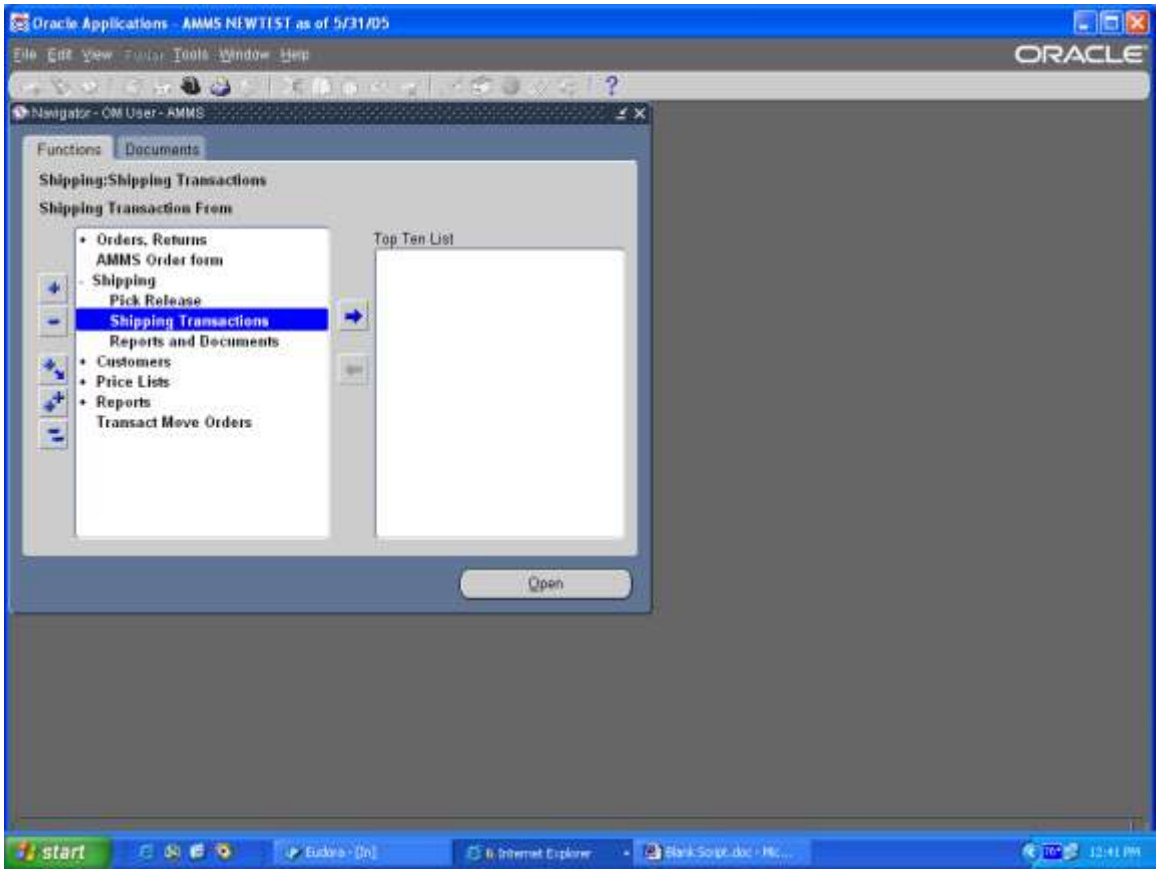
Step Description: Sign onto Oracle and select OM User AMMS responsibility

Expected Results: OM User AMMS main menu will appear



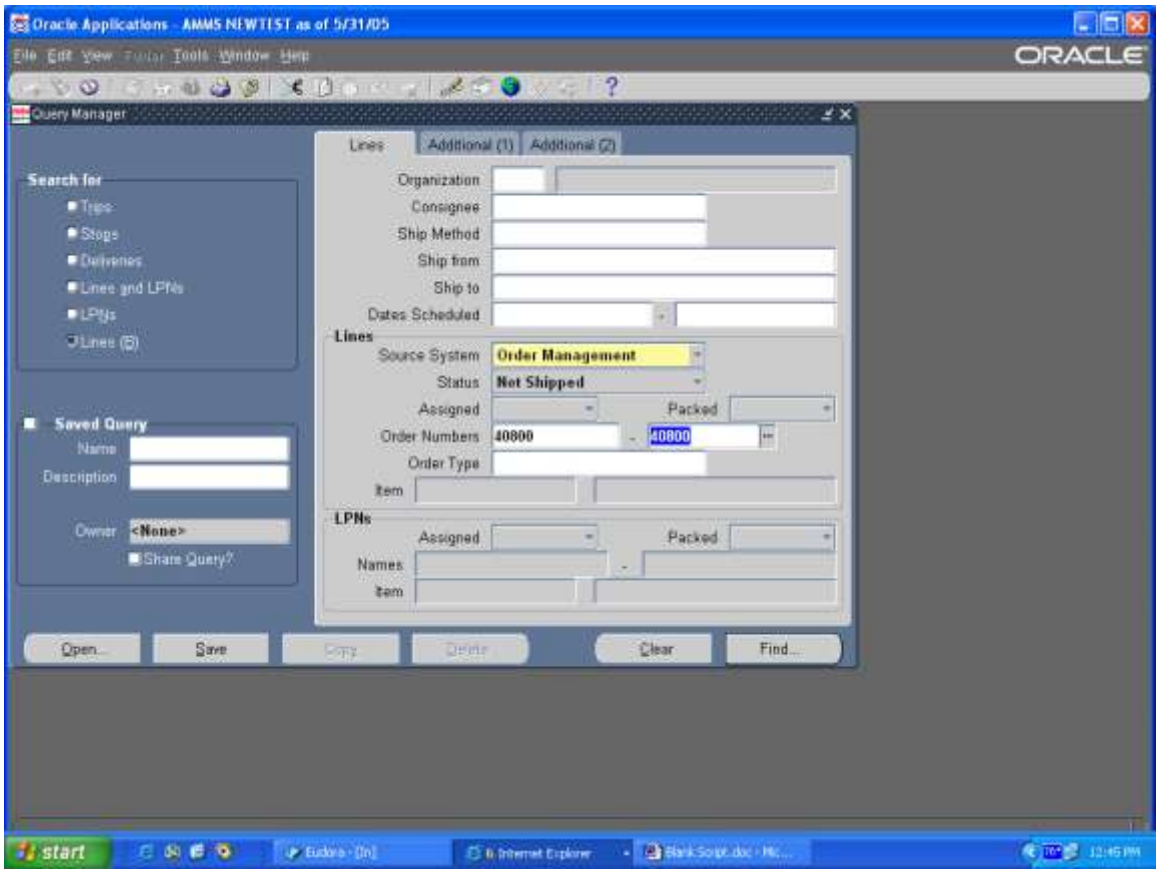
Step Description: From the OM User AMMS main menu select Shipping> Shipping Transactions, click on the Open button

Expected Results: Query Manager window will appear



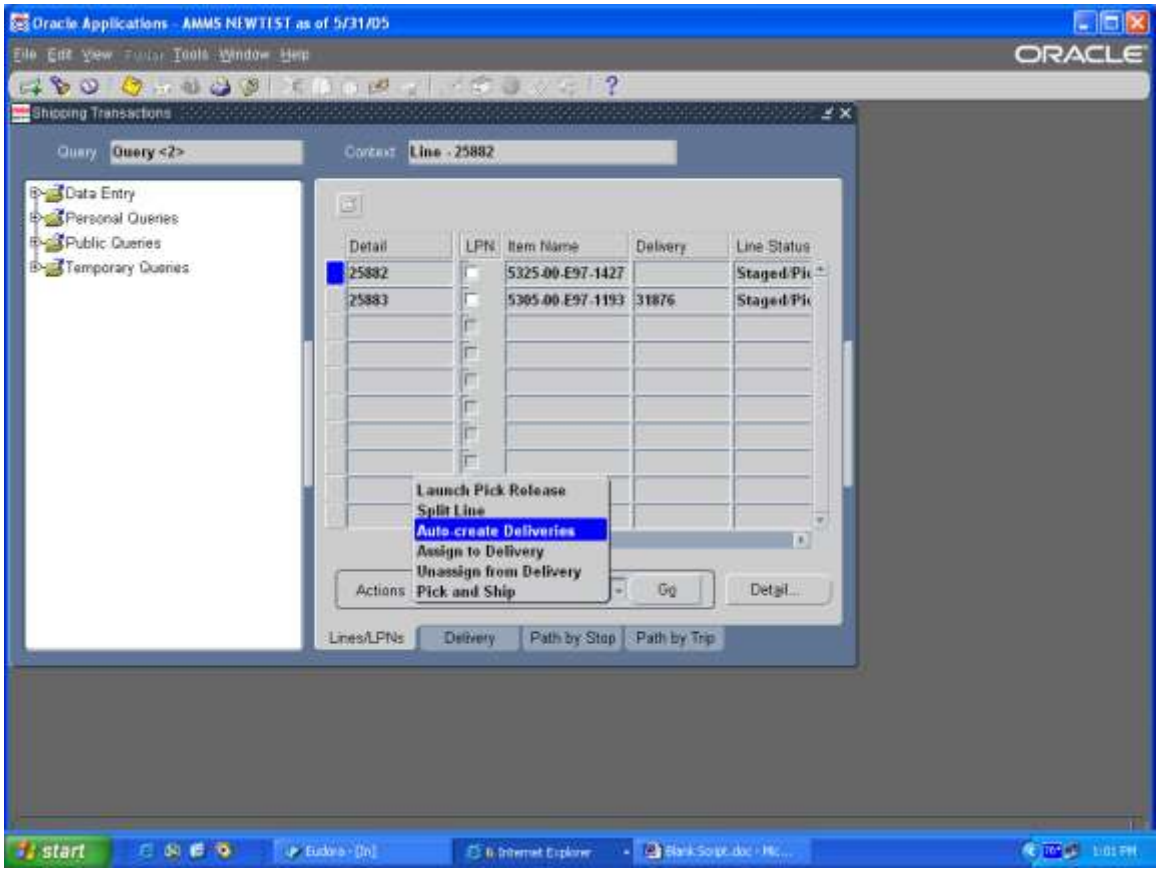
Step Description: In the Order number field enter the sales order number for the pick slip you are working with, enter the sales order number in both field, then click on the Find button

Expected Results: Shipping Transactions window will appear



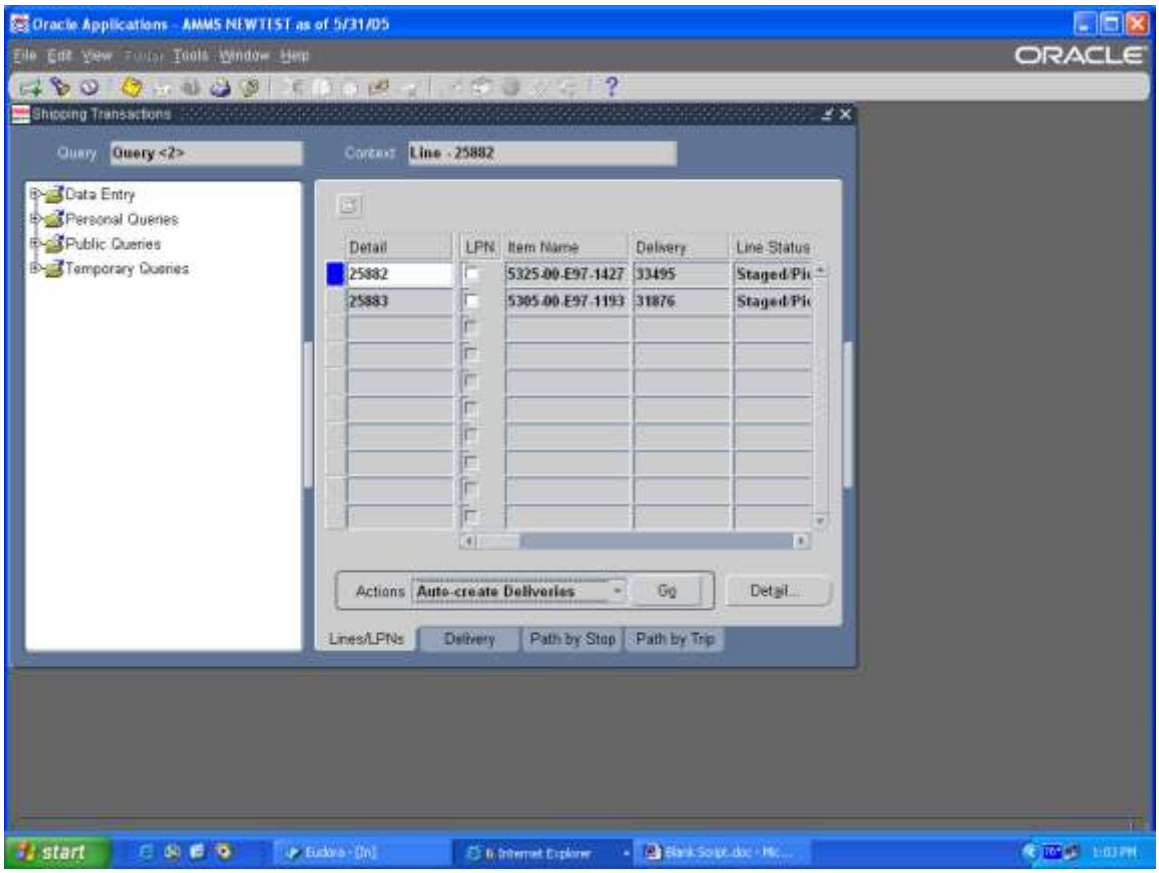
Step Description: You want to transact against the line that does not have a delivery number, and the line status is Staged/Pick Confirm, make sure that the blue line indicator is next to the appropriate line. In the Actions field at the bottom of the screen select Auto-Create Deliveries, then click the Go button.

Expected Results: Delivery field will be populated with a number



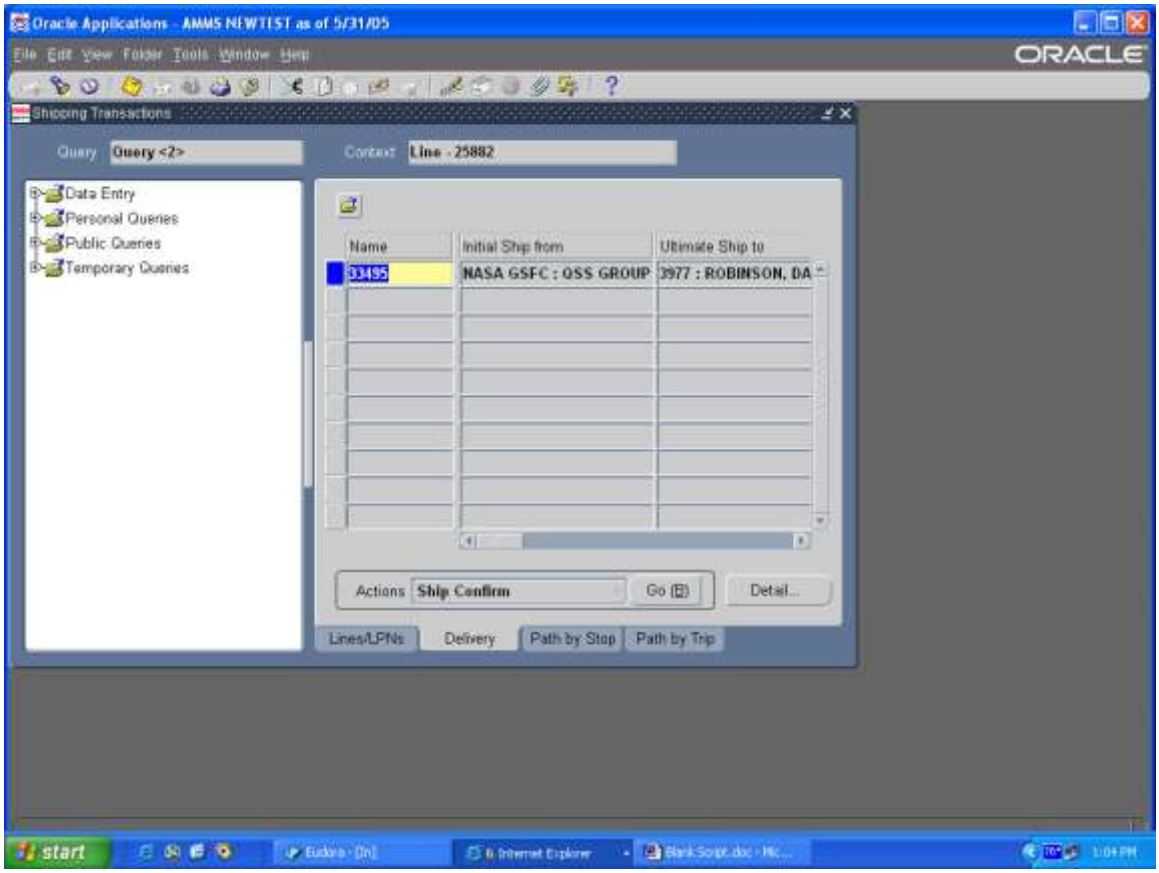
Step Description: For the line that you want to backorder, make sure the blue line indicator is next to the appropriate line, then click on the Delivery tab at the bottom of the screen

Expected Results: Window view will change



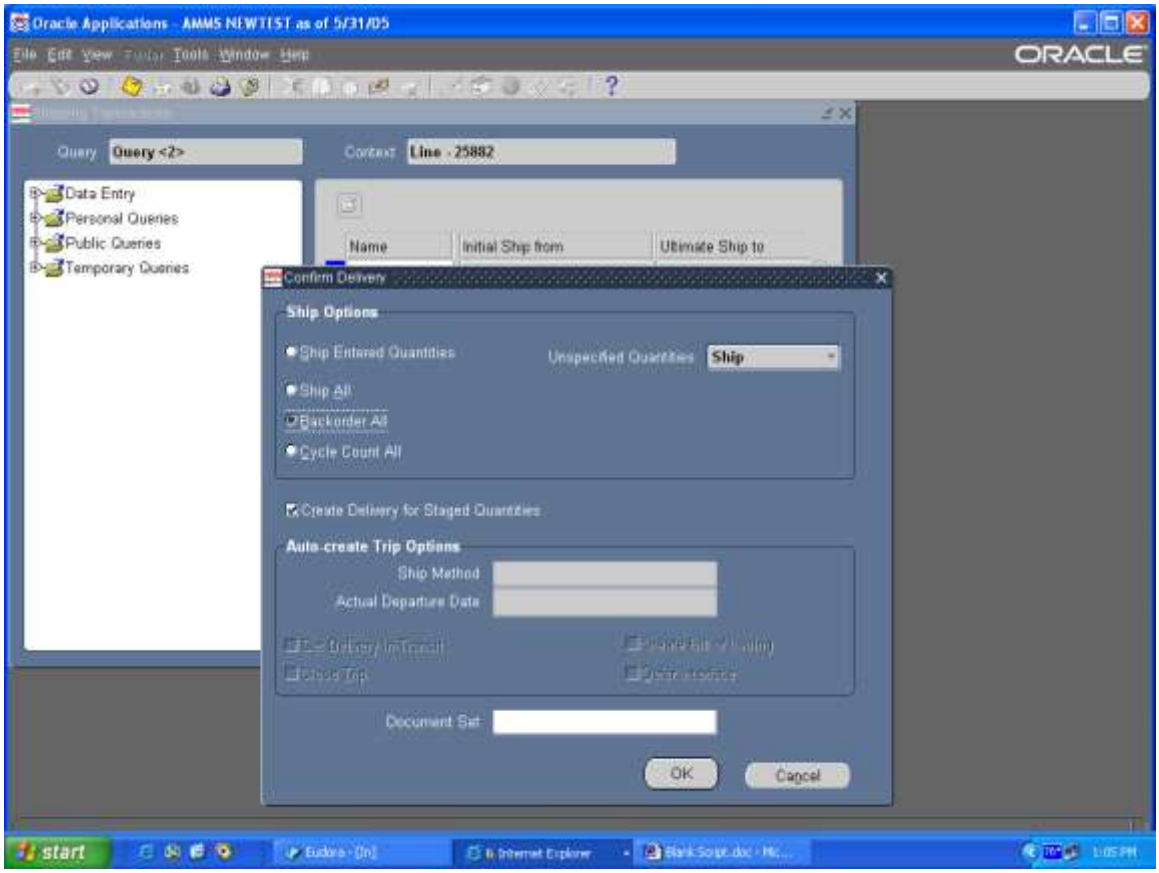
Step Description: At the Delivery Tab, in the Action field at the bottom of the screen select Ship Confirm, click on the Go button

Expected Results: Confirm Delivery window will appear



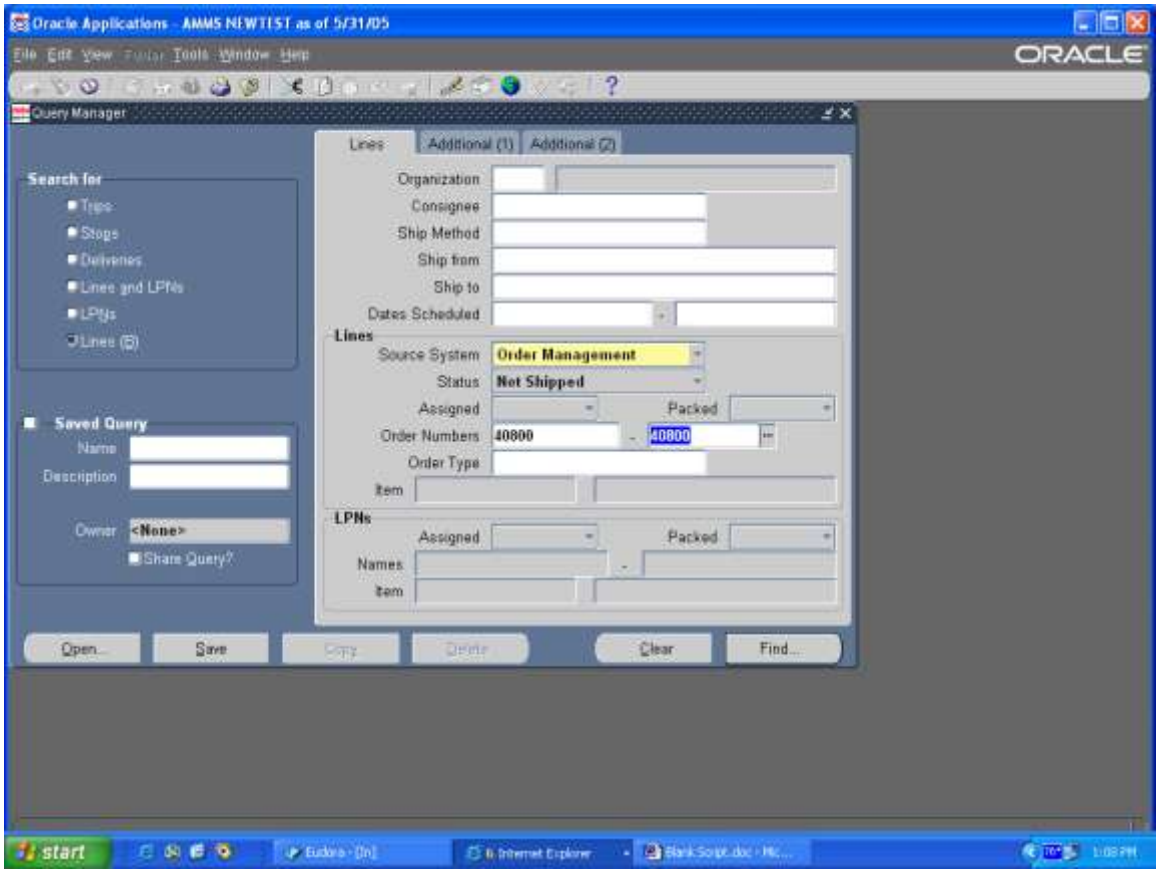
Step Description: In the Ship Options section, select the Backorder All option, then click the OK button

Expected Results: Return to the Shipping Transaction window



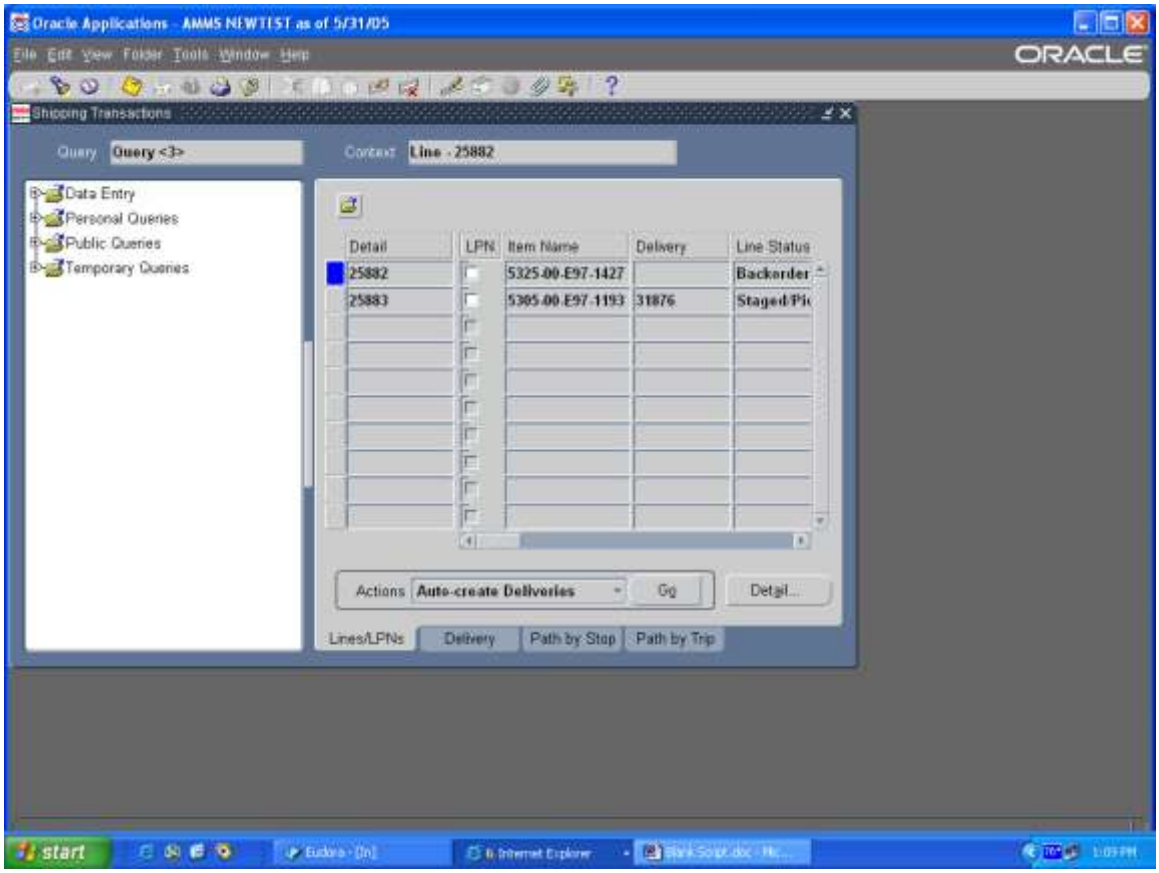
Step Description: To verify that the transaction is complete, from the toolbar select the Flashlight to re-query the record. Click on the Find button

Expected Results: Query Manager window will appear



Step Description: Line status is not backordered. Transaction successful. Close all forms, transactions complete.

Expected Results: Return to OM User AMMS main menu



AMMS TRAINING SCRIPT

View On Hand Qty

Purpose

The purpose of this training script is to explain how to ship confirm customer pick slips in Oracle, this script is only to be used when shipping a complete order with no quantity variances.

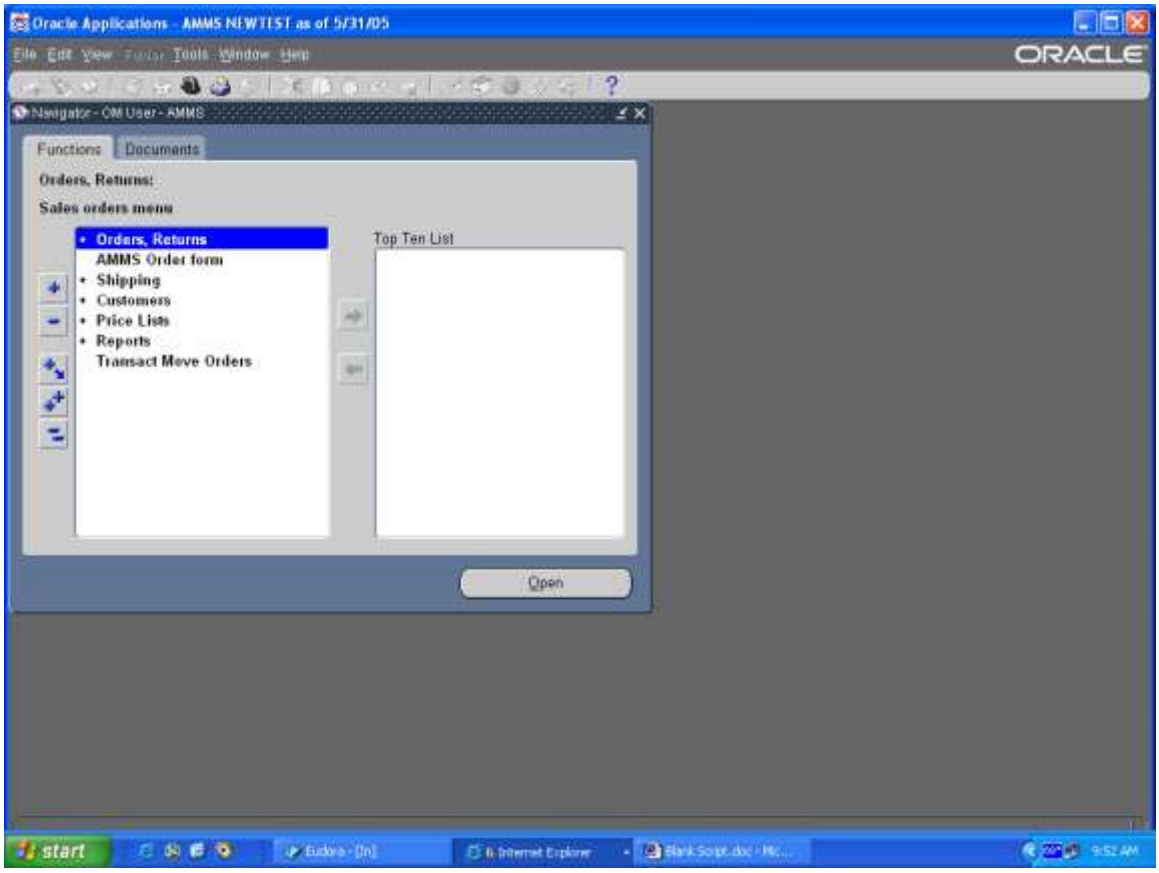
Audience

Warehousemen

Prepared By	Theresa Coulson
Creation Date:	06/01/2005
Document Name	Ship Confirm Complete Pick Slip.doc
Version	2x
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Warehouse\.	

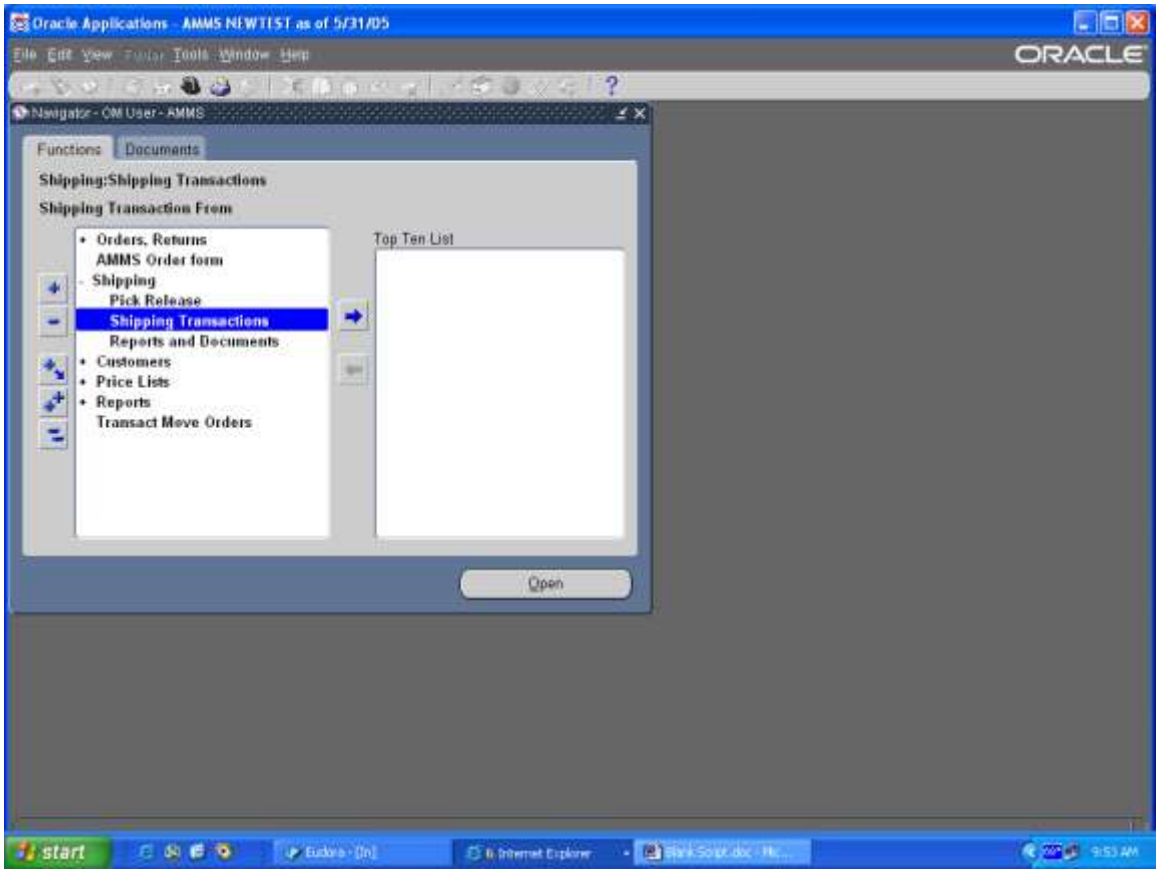
Step Description: Sign onto Oracle and select the OM User responsibility

Expected Results: OM User AMMS main menu will appear



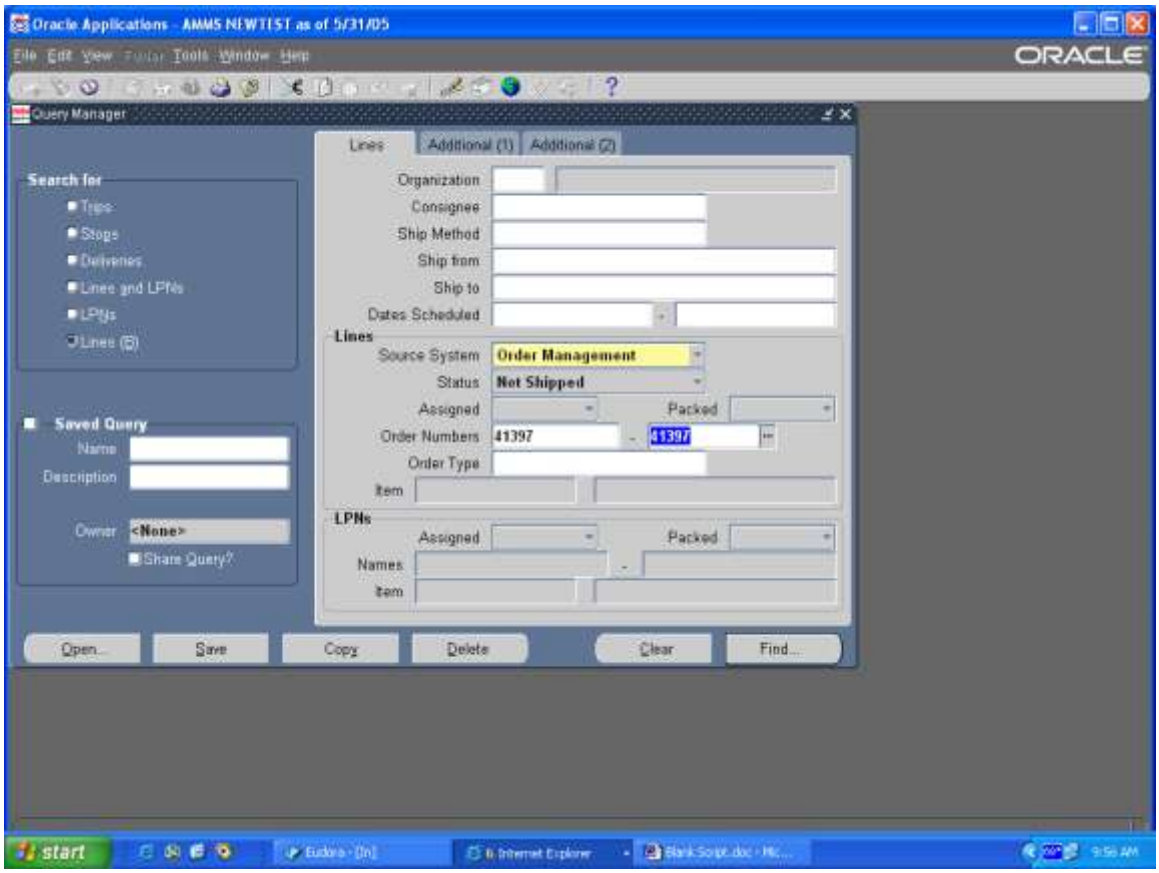
Step Description: From the OM User AMMS main menu select Shipping > Shipping Transactions, click on the Open button

Expected Results: Query Manager window will appear



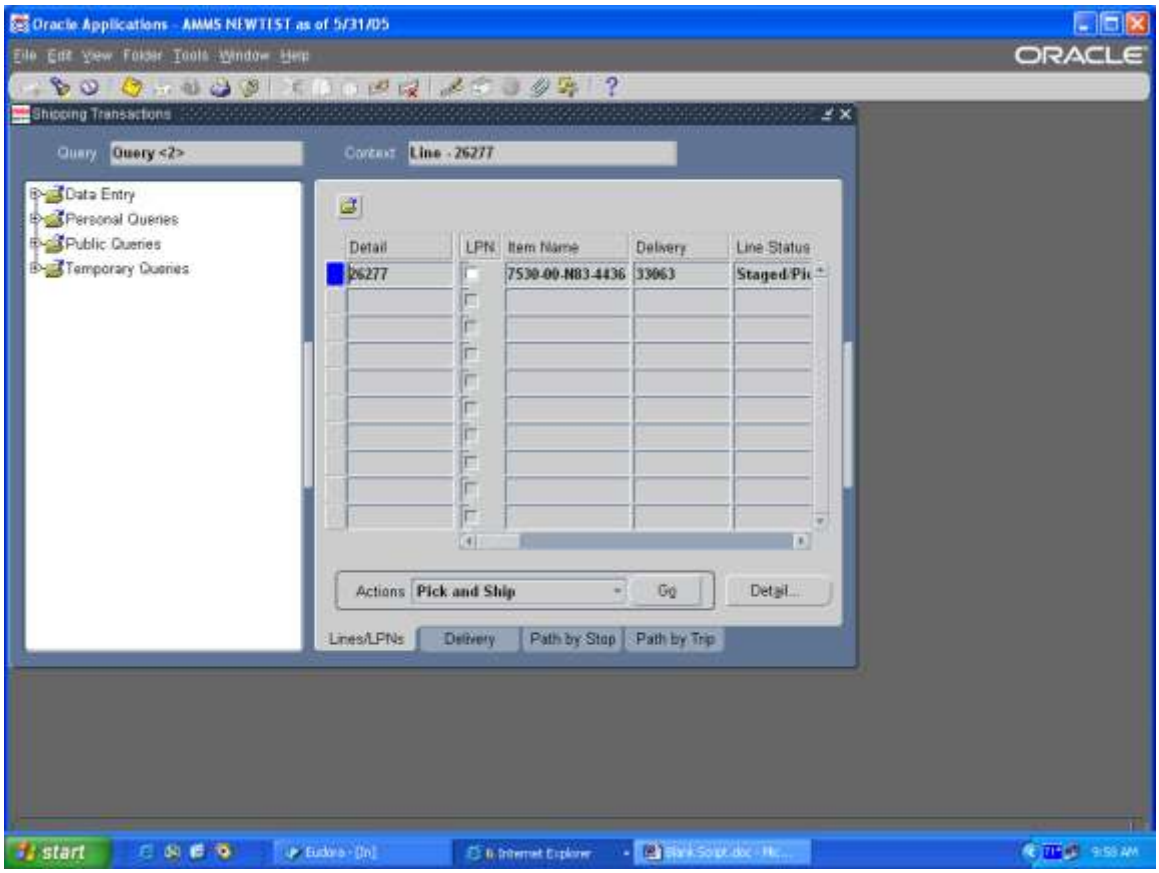
Step Description: In the Order Number field enter the sales order number for the pick slip that you want to close you need to enter this number in both fields. Click on the Find button

Expected Results: Shipping Transaction window will appear



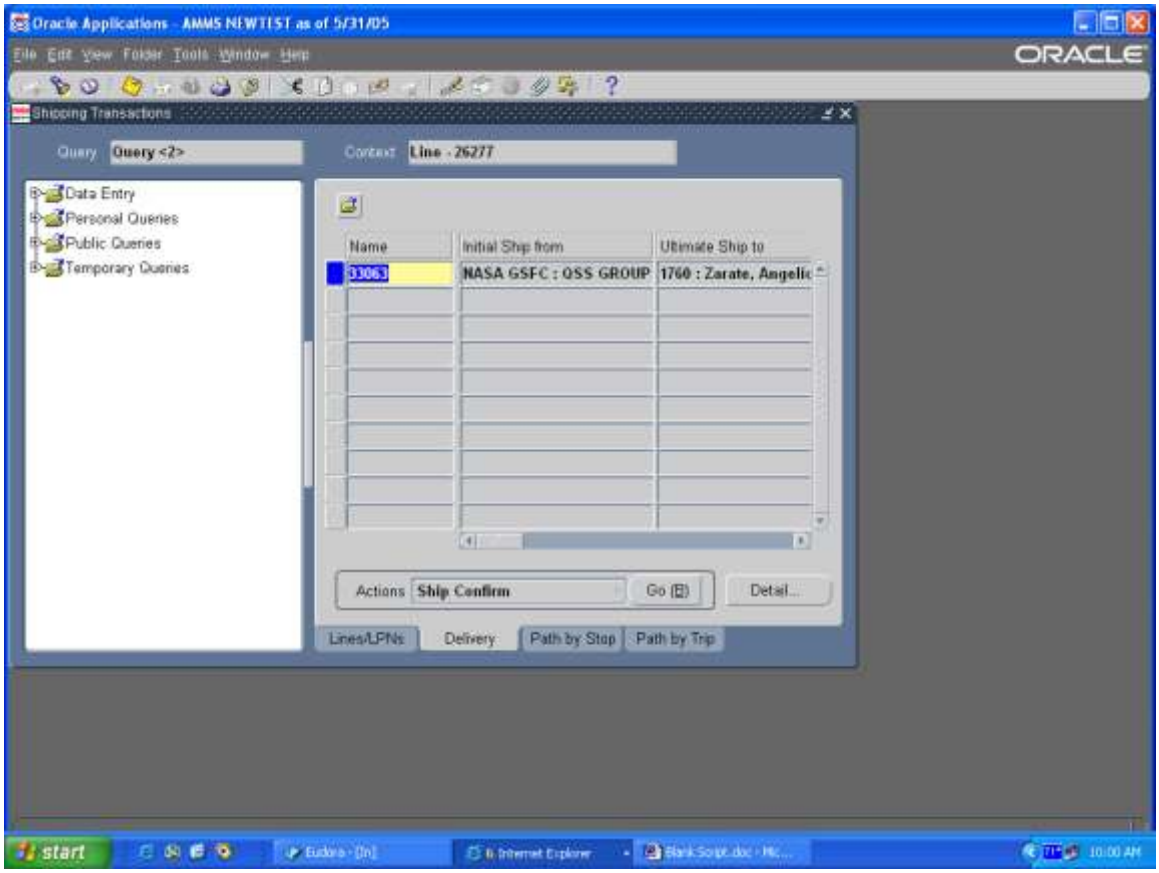
Step Description: Verify that this is the order that you want closed, use the scroll bar verify the item number and the requested qty. Once you have done this click on the Delivery tab at the bottom of the screen.

Expected Results: Screen view will change



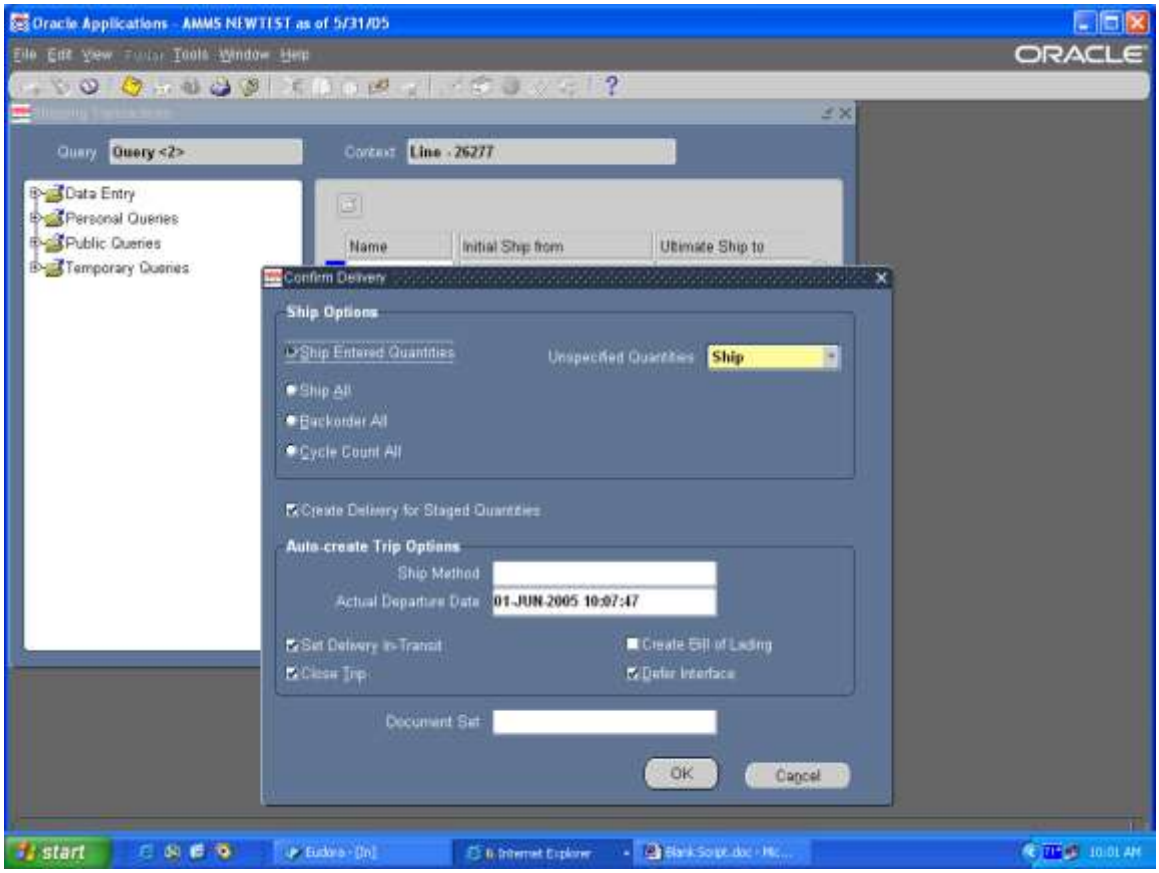
Step Description: Once you have verified that this is the correct order, in the Actions field, select Ship Confirm, click on the Go button

Expected Results: Confirm Delivery window will appear



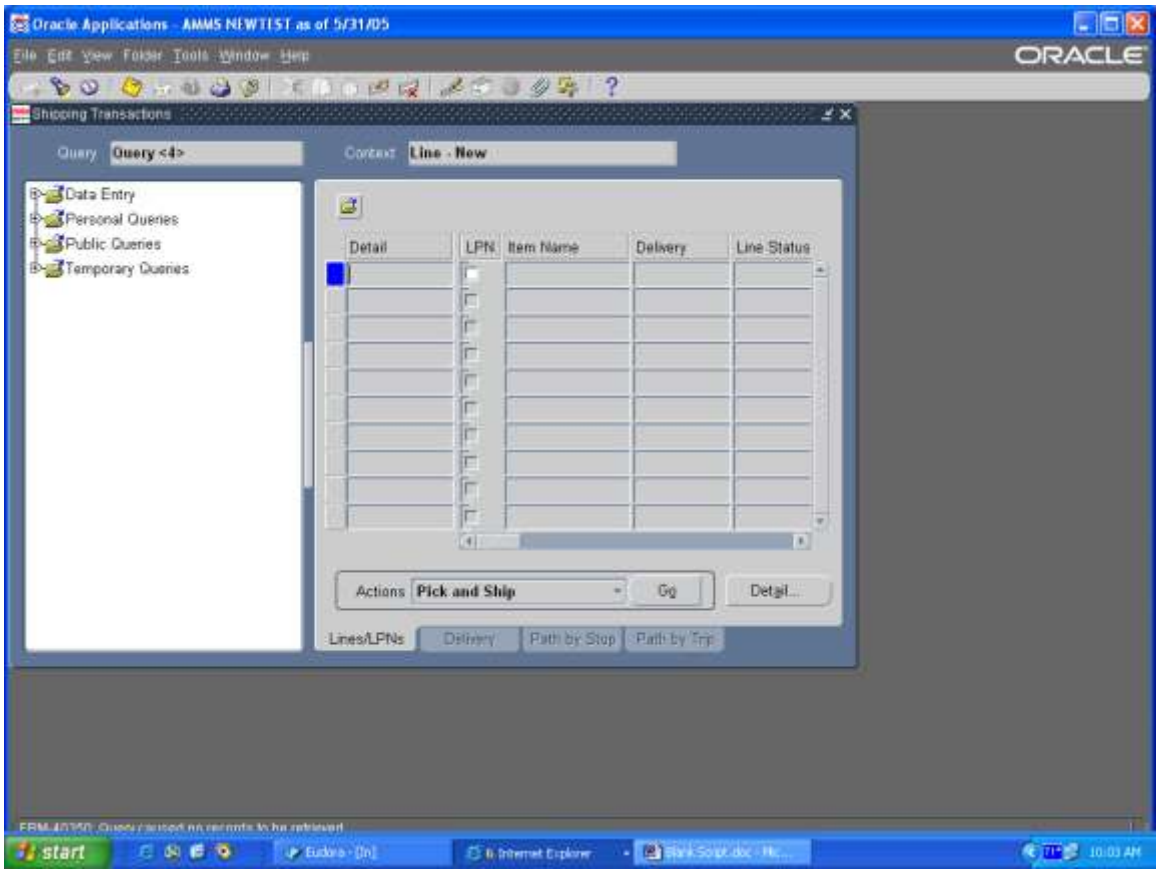
Step Description: Make sure that the Ship Entered Quantities button is selected, Click Ok

Expected Results: Return to the Shipping Transactions window



Step Description: To verify that the order is closed, re-query the record. Select from the toolbar the Flashlight, the Query Manger window will appear, click on the Find button, the screen should be blank

Expected Results: Screen will be blank



AMMS TRAINING SCRIPT

Split Line on a Pick Slip When Ship Confirming

Purpose

The purpose of this training script is to explain how to ship partial quantity when ship confirming a pick slip.

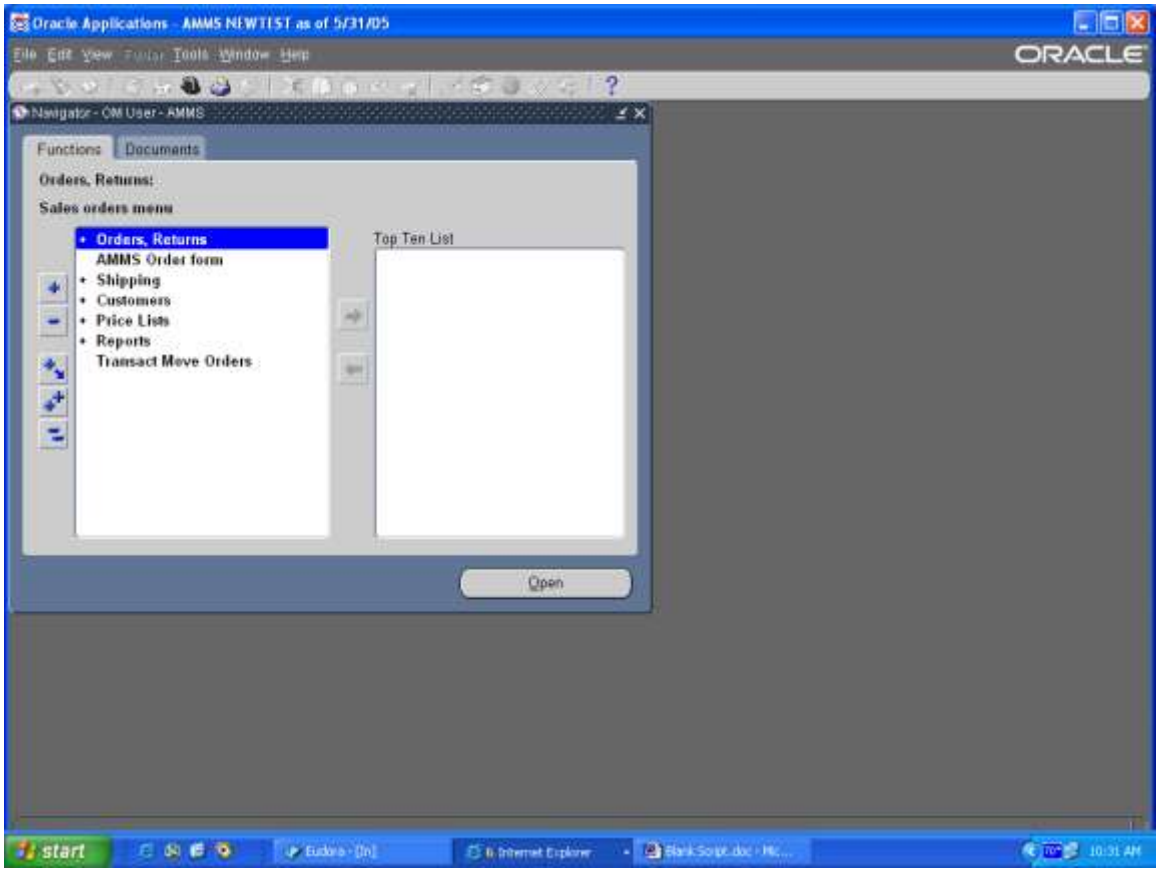
Audience

Warehousemen, Inspectors, and Material Coordinators

Prepared By	Theresa Coulson
Creation Date:	01/09/2006
Document Name	Split Line on Pick Slip.doc
Version	2
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Warehouse\.	

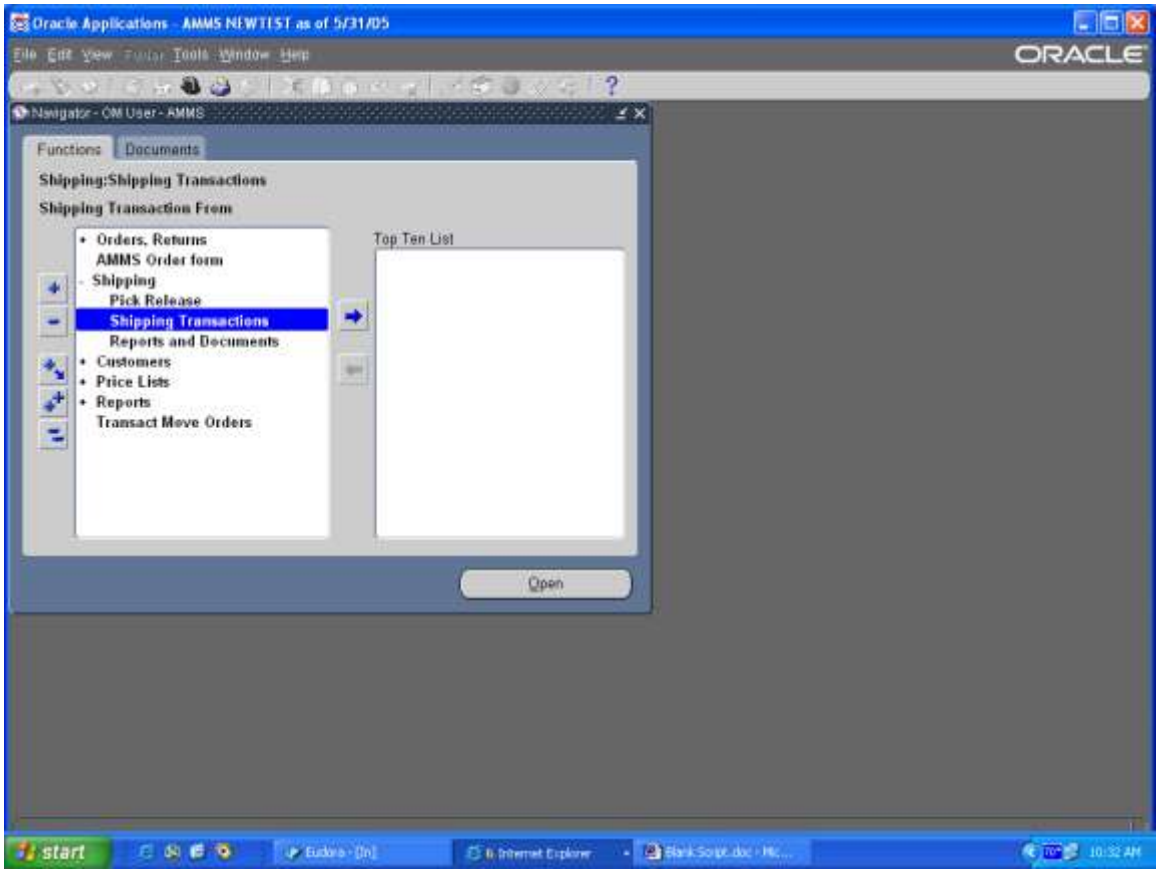
Step Description: Sign onto Oracle and select the OM User AMMS responsibility

Expected Results: OM User AMMS main menu will appear



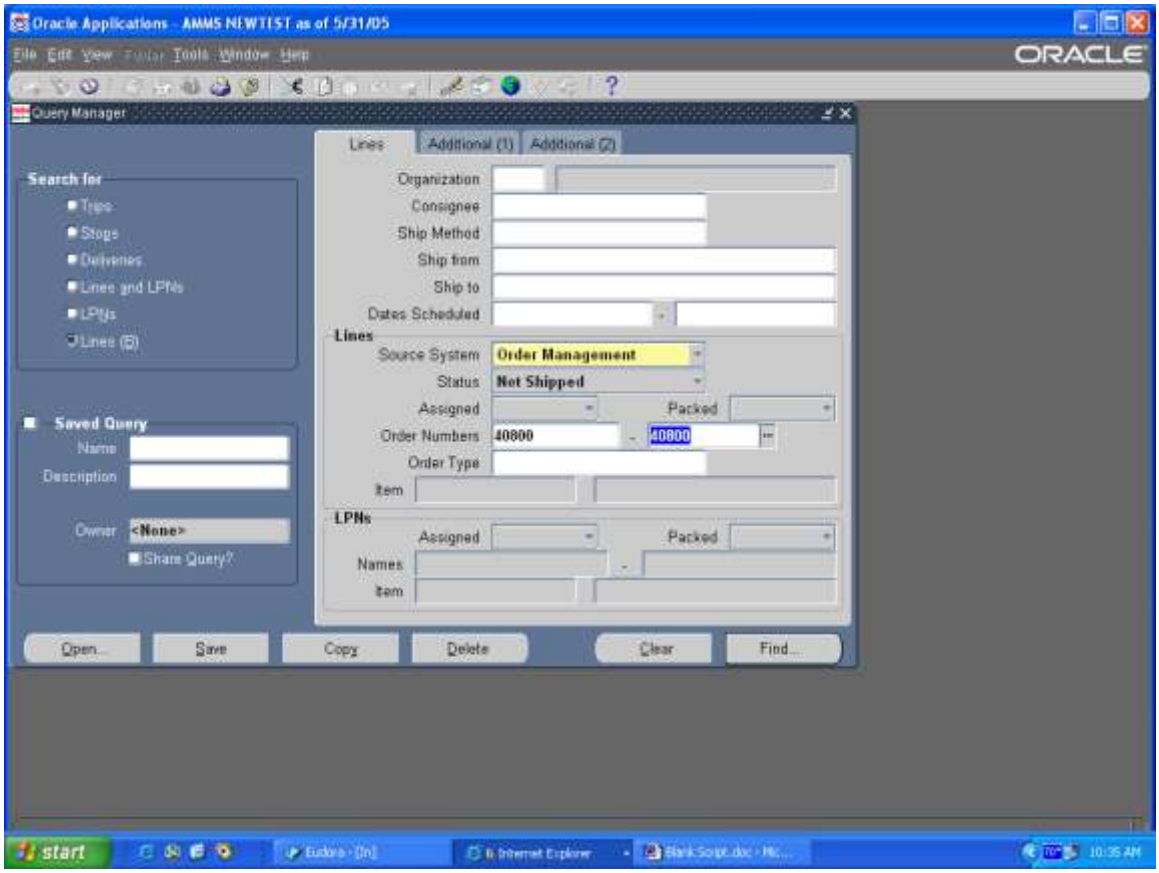
Step Description: From the OM User main menu select Shipping > Shipping Transactions, click on the Open button

Expected Results: Query Manager window will appear



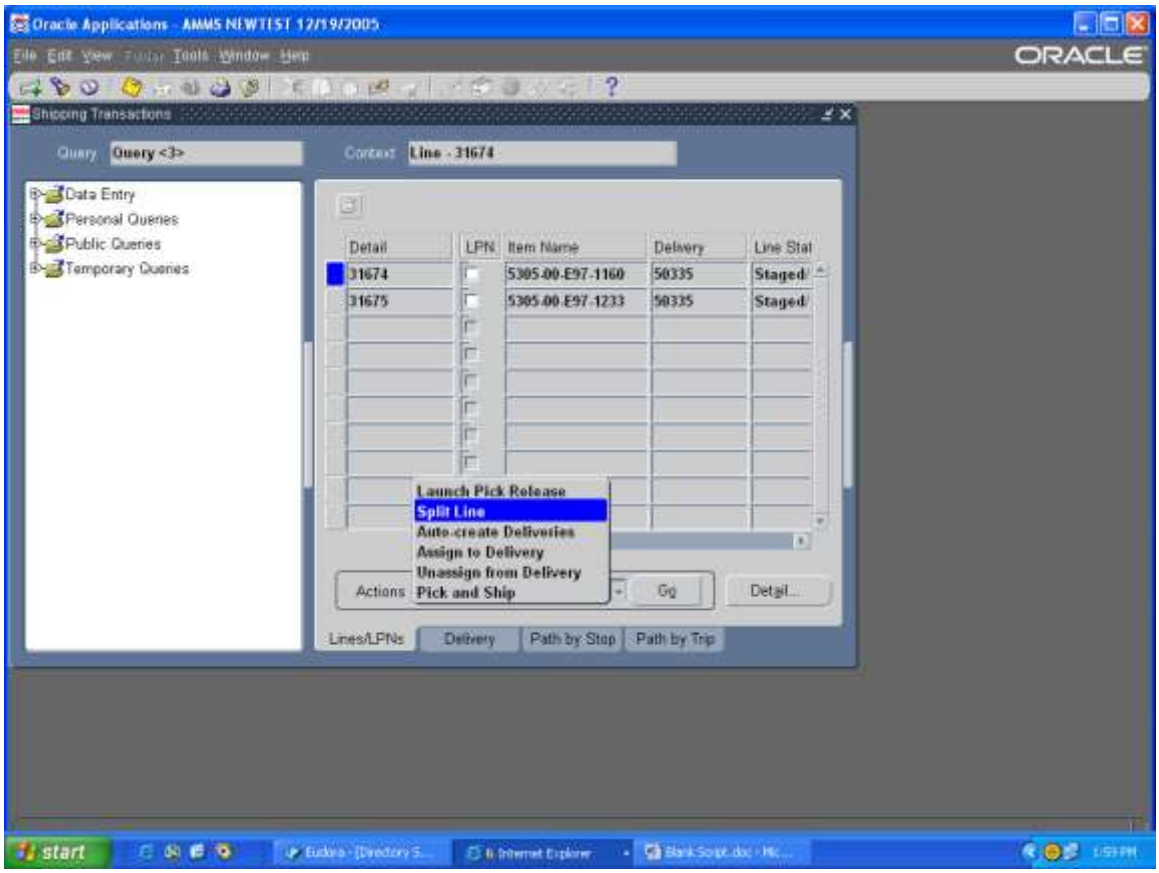
Step Description: In the Order Number field enter the sales order that you want to transact against, enter the number in both fields, click on the Find button

Expected Results: Shipping Transaction window will appear



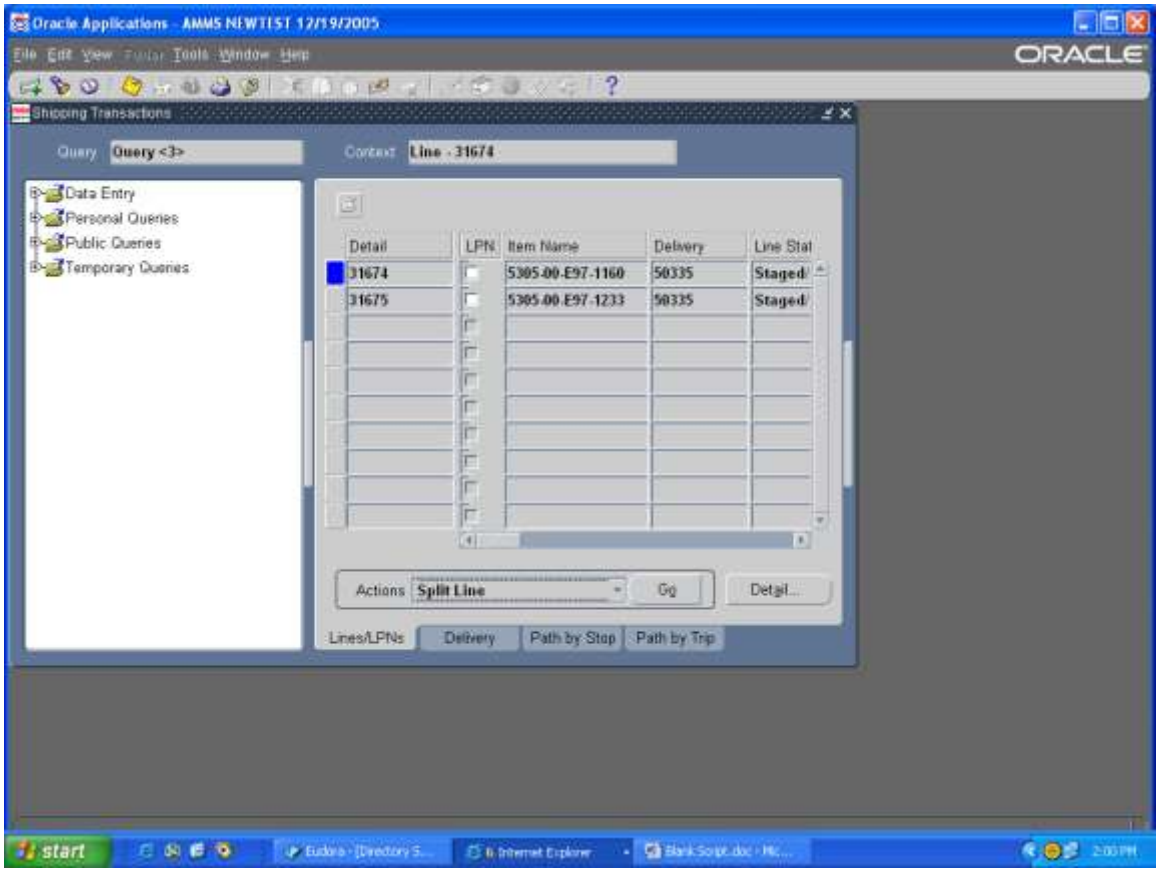
Step Description: If you are only able to full partial quantity for one of the lines you need to split the line. Make sure that the blue cursor is next to the line you are shipping for the partial qty. From the Actions at the bottom of the screen select Split Line

Expected Results: Action menu will change



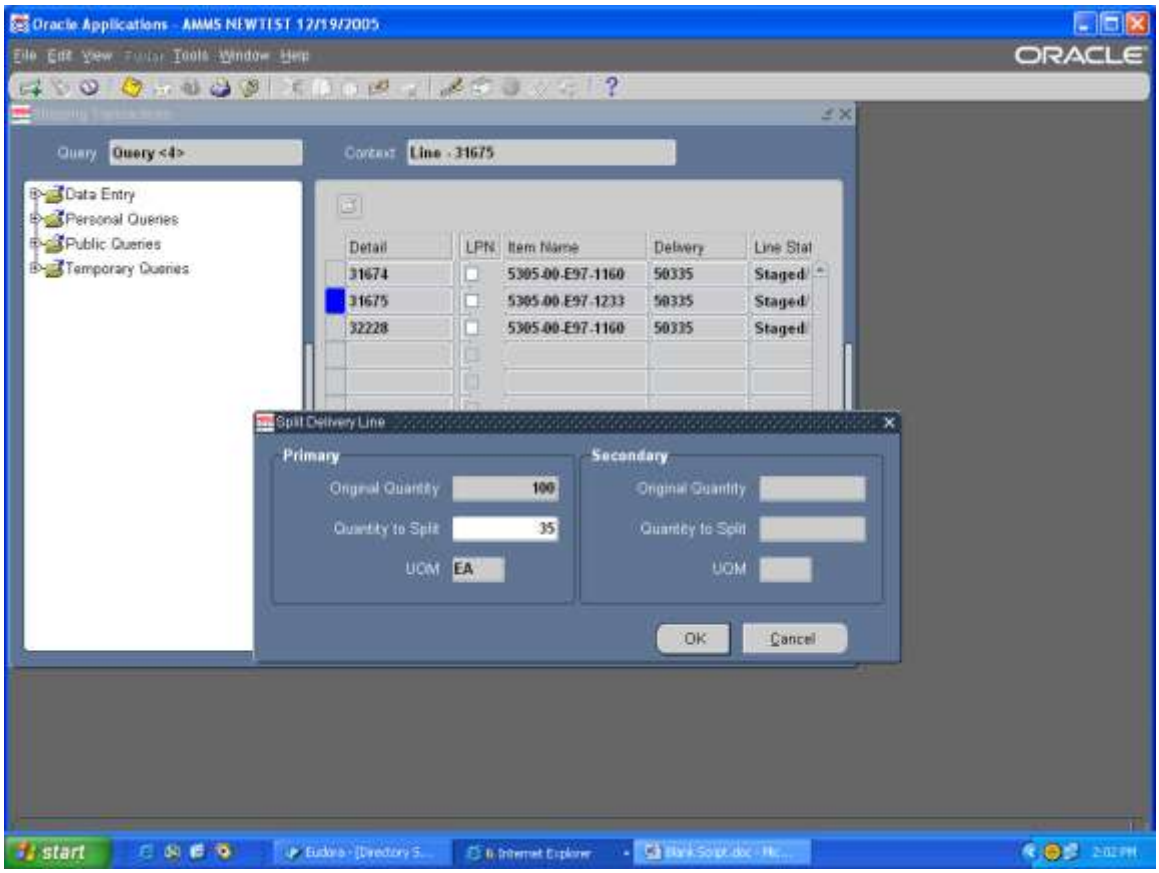
Step Description: Click on Go

Expected Results: Split Delivery Line window will appear



Step Description: In the Quantity to Split field enter the quantity that is NOT being shipped, click OK

Expected Results: Line will split, you will have different detail number, but the same item and delivery number



Step Description: If you scroll to the right you will seen the quantities for each line. **If you only want to ship one line to MUST Un-Assign the other line from delivery.**

Expected Results: Line Qty will be different

AMMS TRAINING SCRIPT

Un-Assign Item from Delivery on Pick Slip

Purpose

The purpose of this training script is to explain how to unassign items from a pick delivery

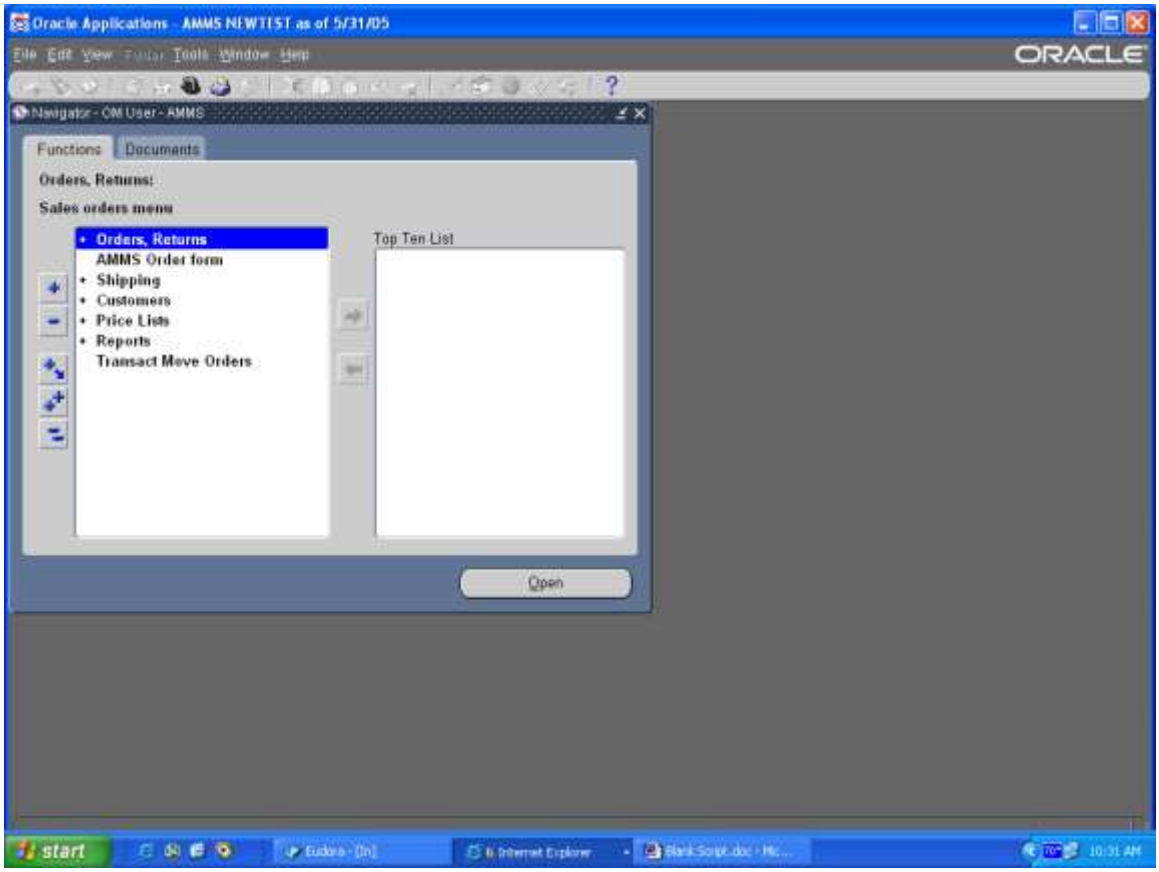
Audience

Warehousemen

Prepared By	Theresa Coulson
Creation Date:	06/01/2005
Document Name	Un-Assign Item from Delivery on a Pick Slip.doc
Version	2
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Warehouse\.	

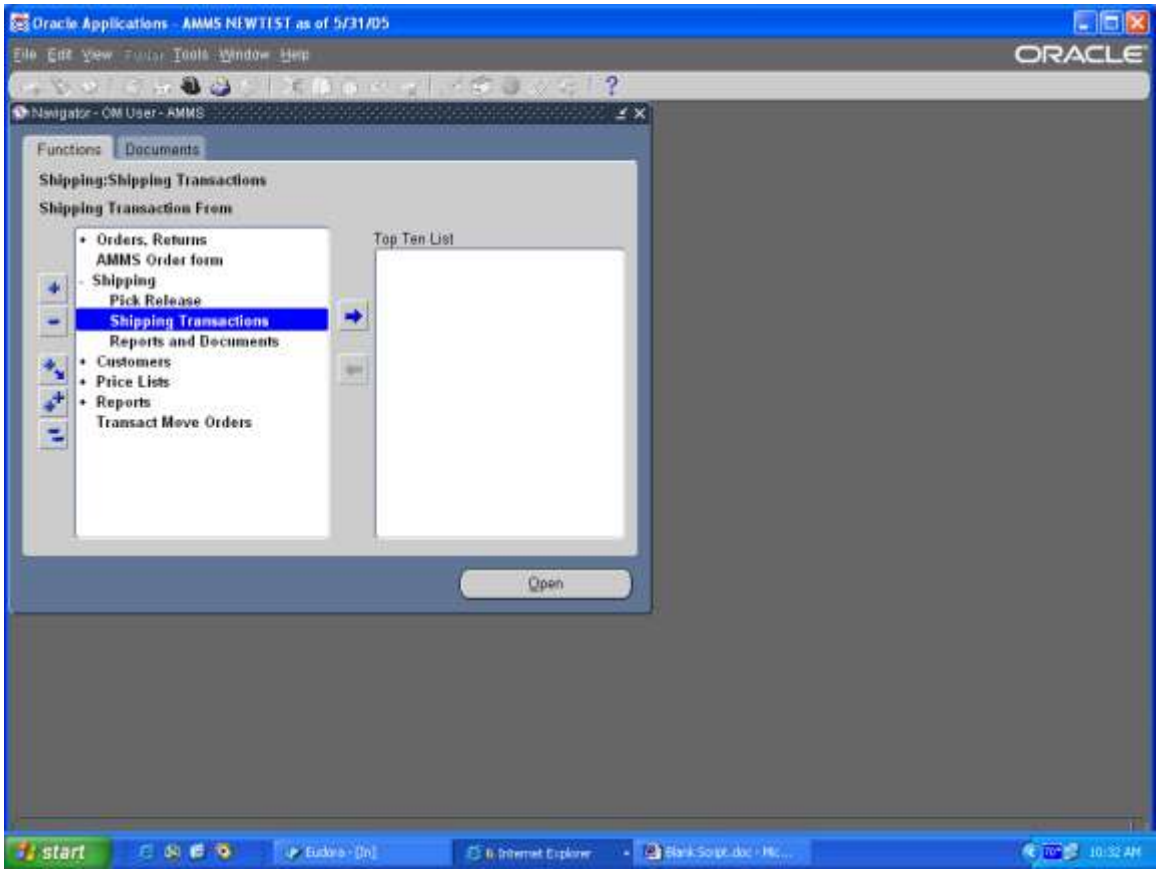
Step Description: Sign onto Oracle and select the OM User AMMS responsibility

Expected Results: OM User AMMS main menu will appear



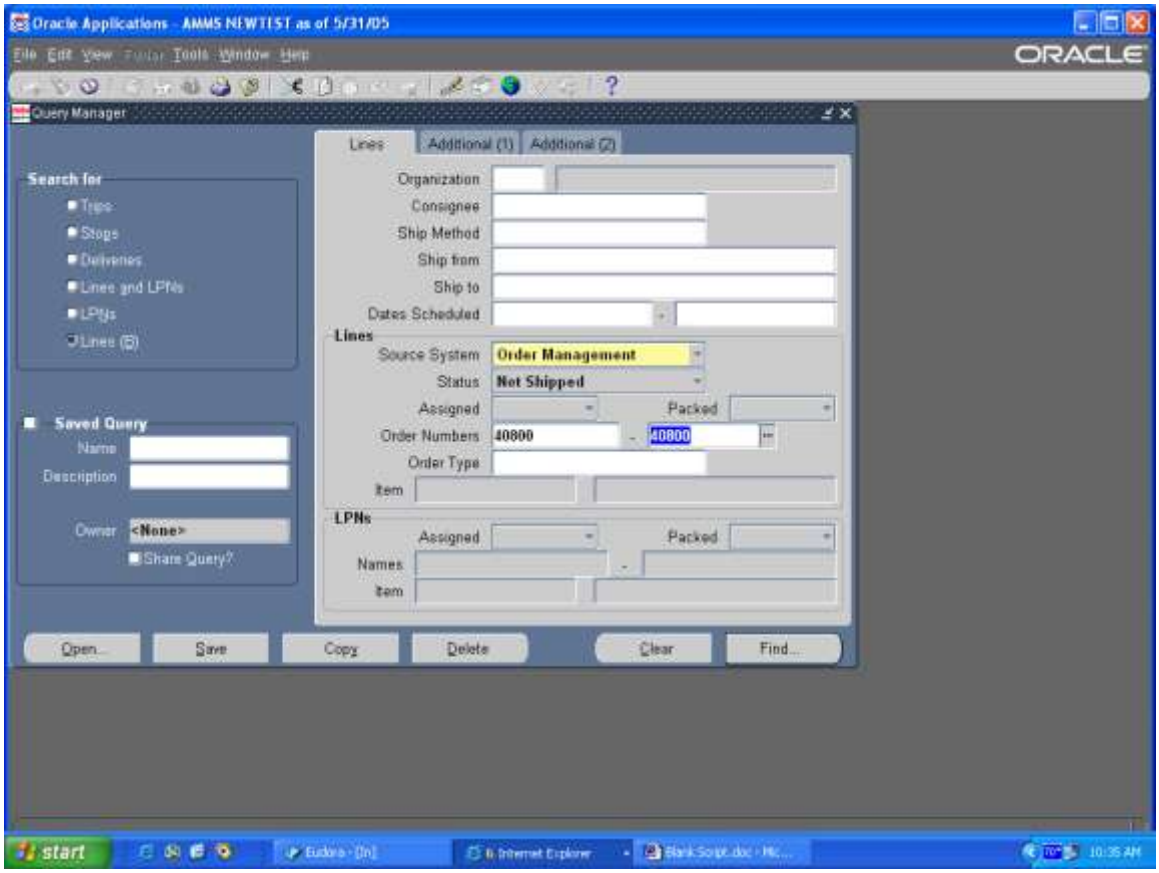
Step Description: From the OM User main menu select Shipping > Shipping Transactions, click on the Open button

Expected Results: Query Manager window will appear



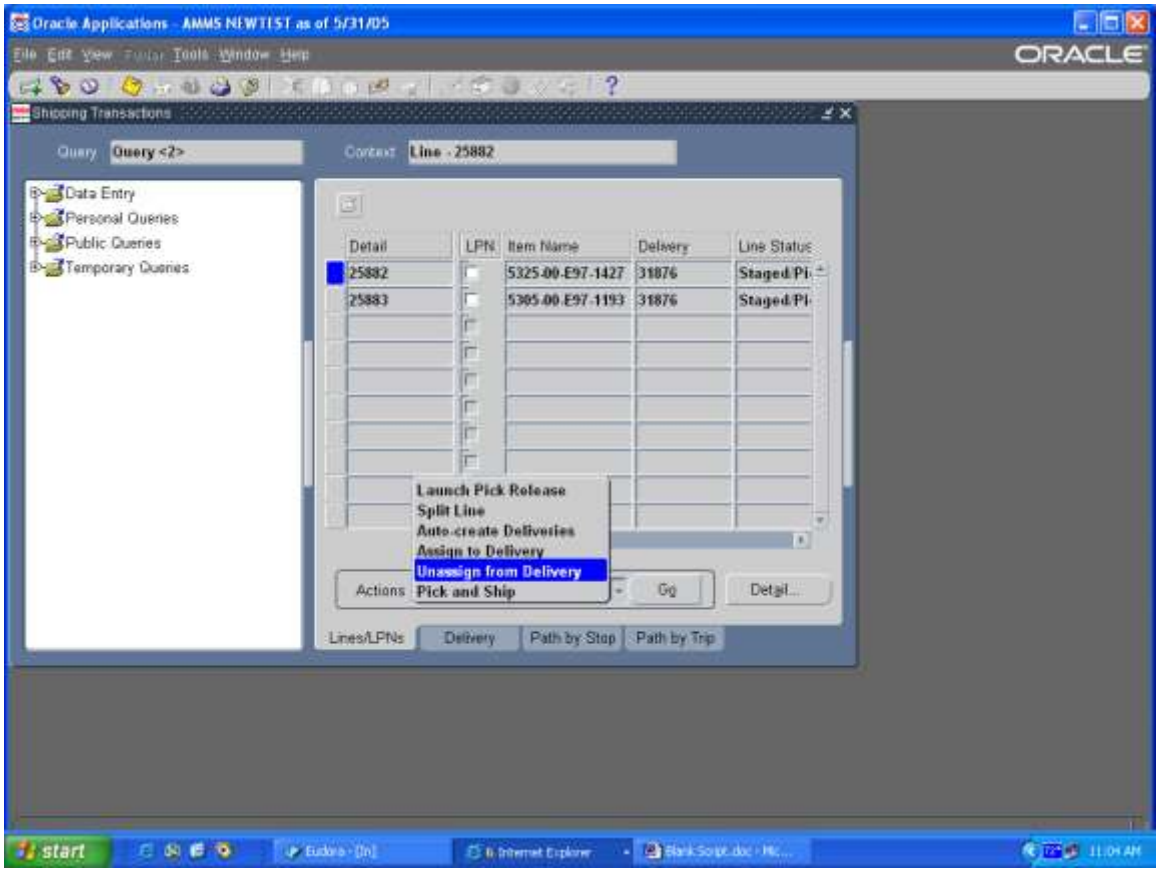
Step Description: In the Order Number field enter the sales order that you want to transact against, enter the number in both fields, click on the Find button

Expected Results: Shipping Transaction window will appear



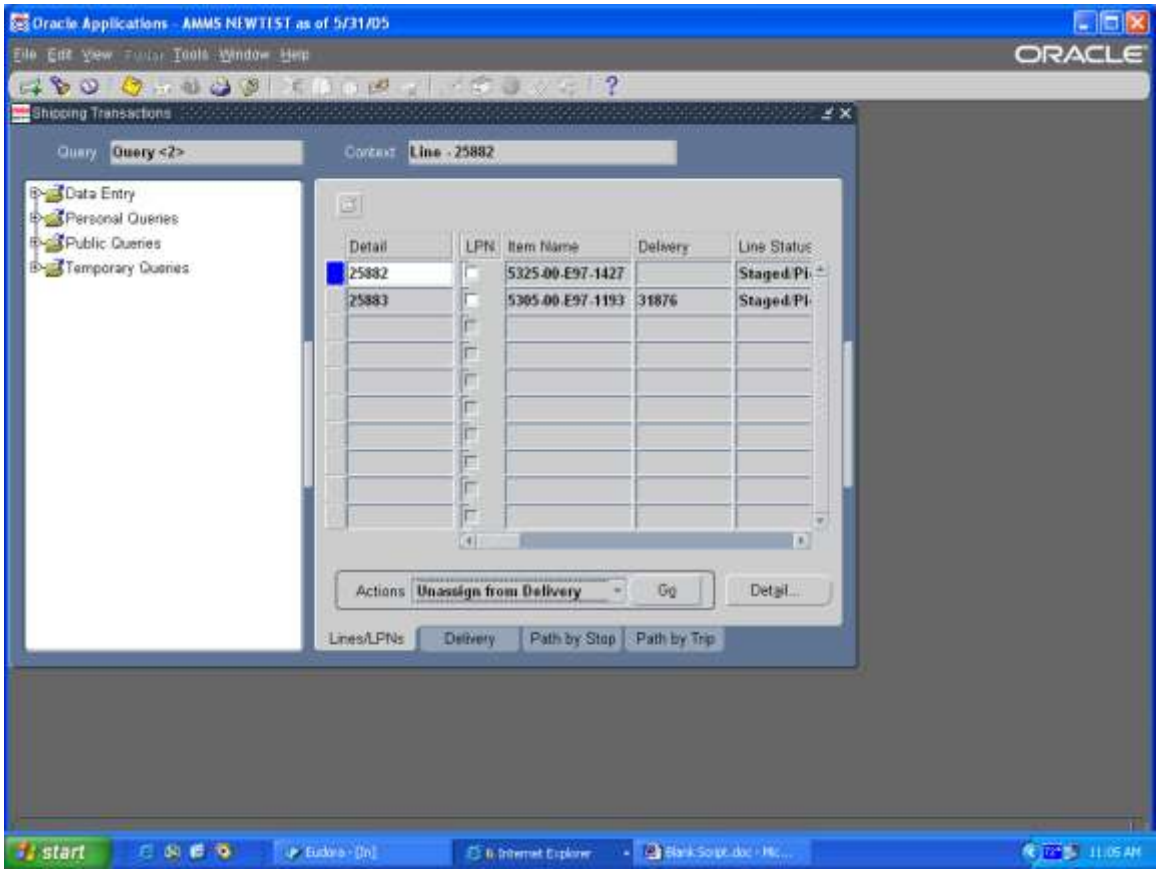
Step Description: If you were unable to fill one of the items on the order you need to Un-assign the item from the delivery. Make sure the blue indicator is next to the item you want to us-assign. In the Actions field at the bottom of the screen select un-assign from delivery and then click the Go button.

Expected Results: This will remove the delivery number from this line on the order



Step Description: This line has been unassigned from this delivery, the remaining items on the order can be ship confirmed.

Expected Results: One line still open



AMMS INVENTORY TRAINING SCRIPTS

AMMS TRAINING SCRIPT

Assign Locator to Item at Organization Level

Purpose

The purpose of this training script is to walk you through how to assign a locator to an item at the organization level

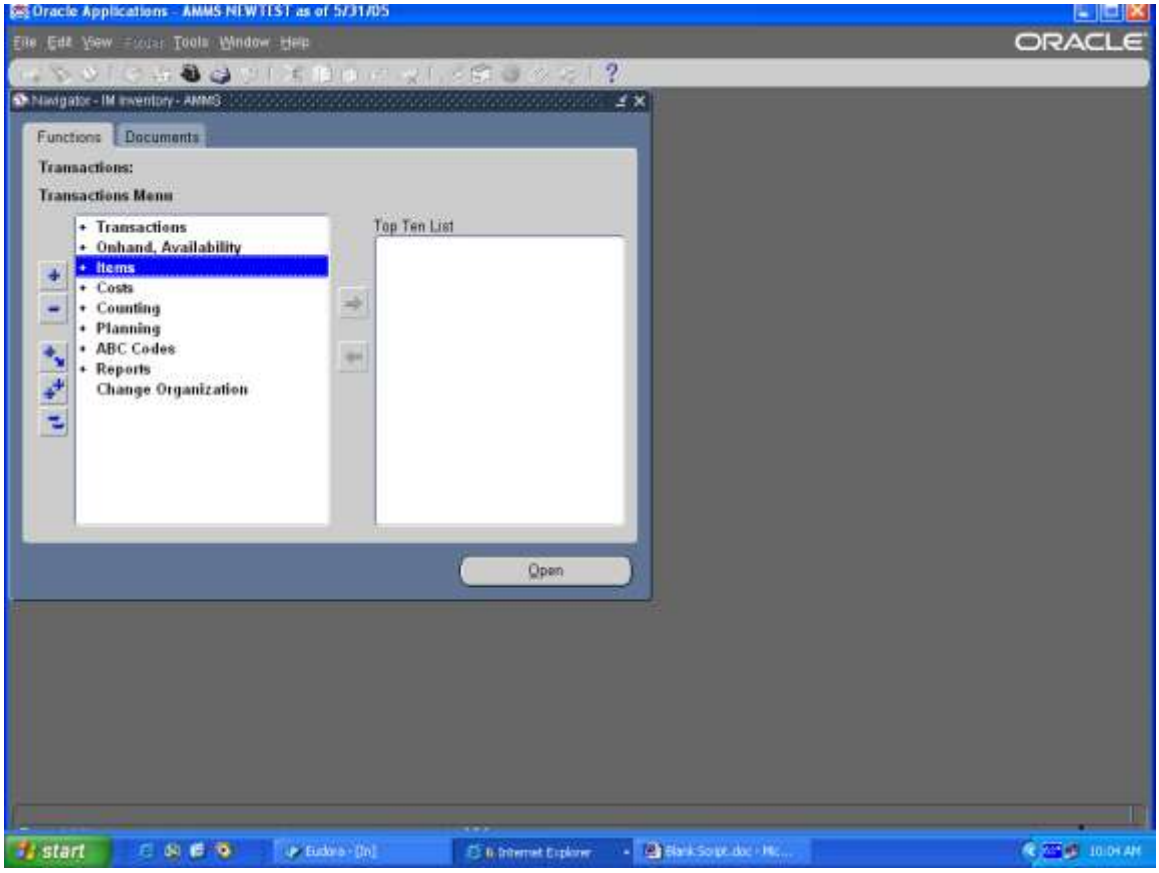
Audience

Warehousemen, Material Coordinator, Inspectors, and Supply Technician Team Leads

Prepared By	Theresa Coulson
Creation Date:	06/02/2005
Document Name	Add locator at Organization Level.doc
Version	2
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Inventory.	

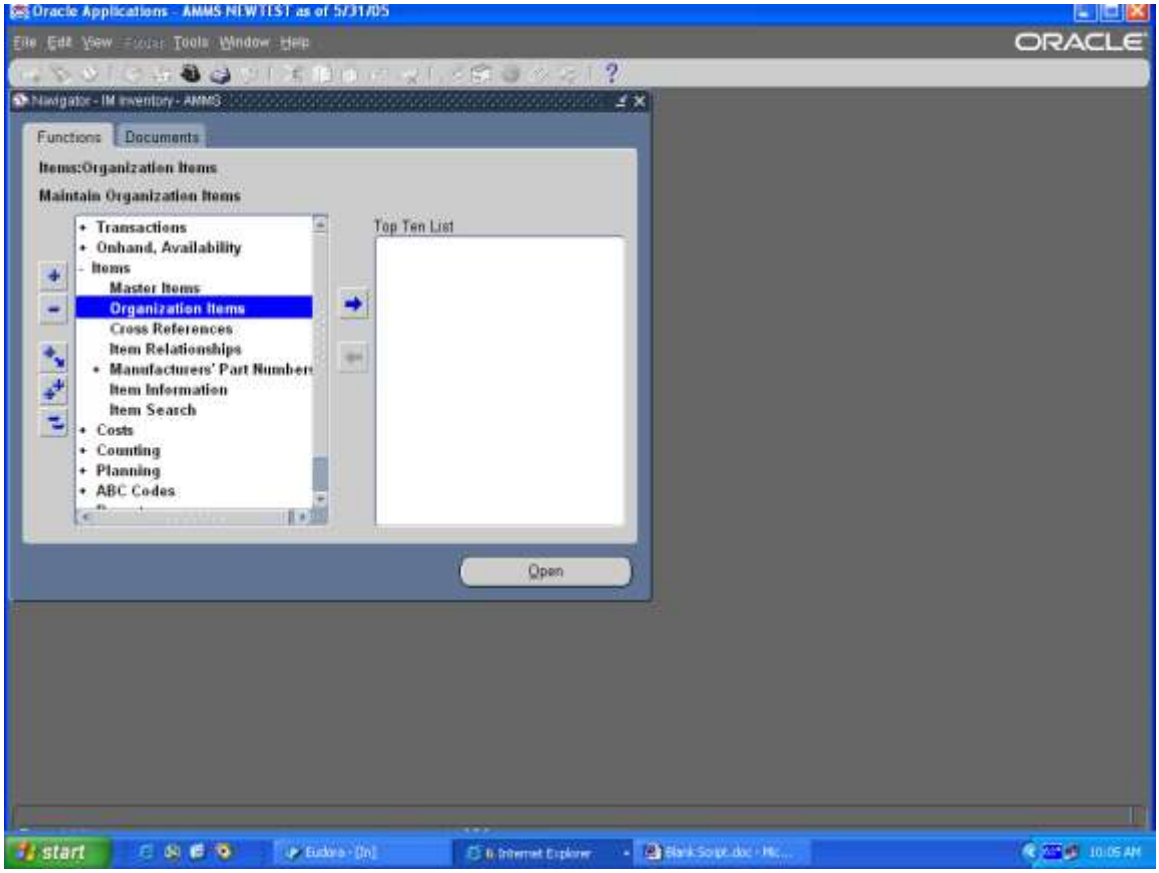
Step Description: Sign onto Oracle and select the IM Inventory AMMS responsibility

Expected Results: The IM Inventory AMMS main menu will appear



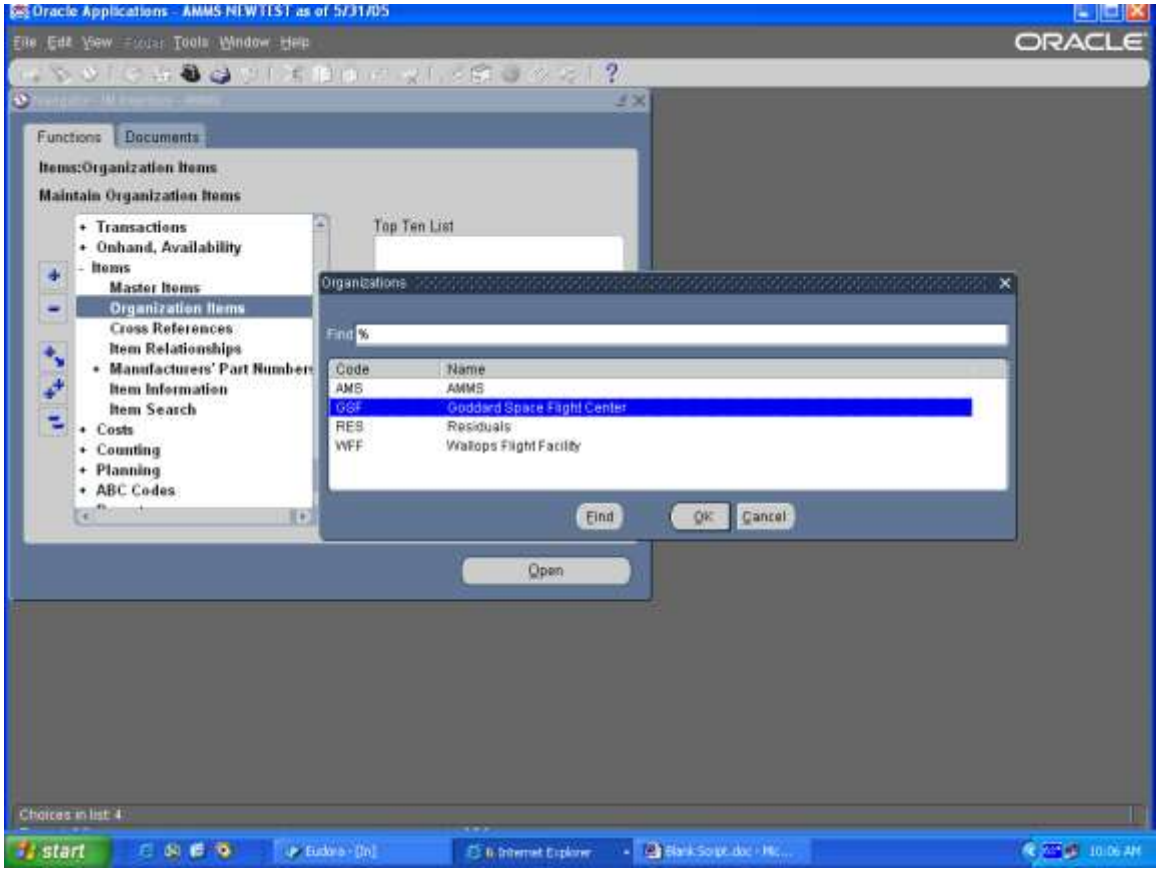
Step Description: From the IM Inventory AMMS main menu select, Items > Organization Items, click on the Open button

Expected Results: Organization window will appear



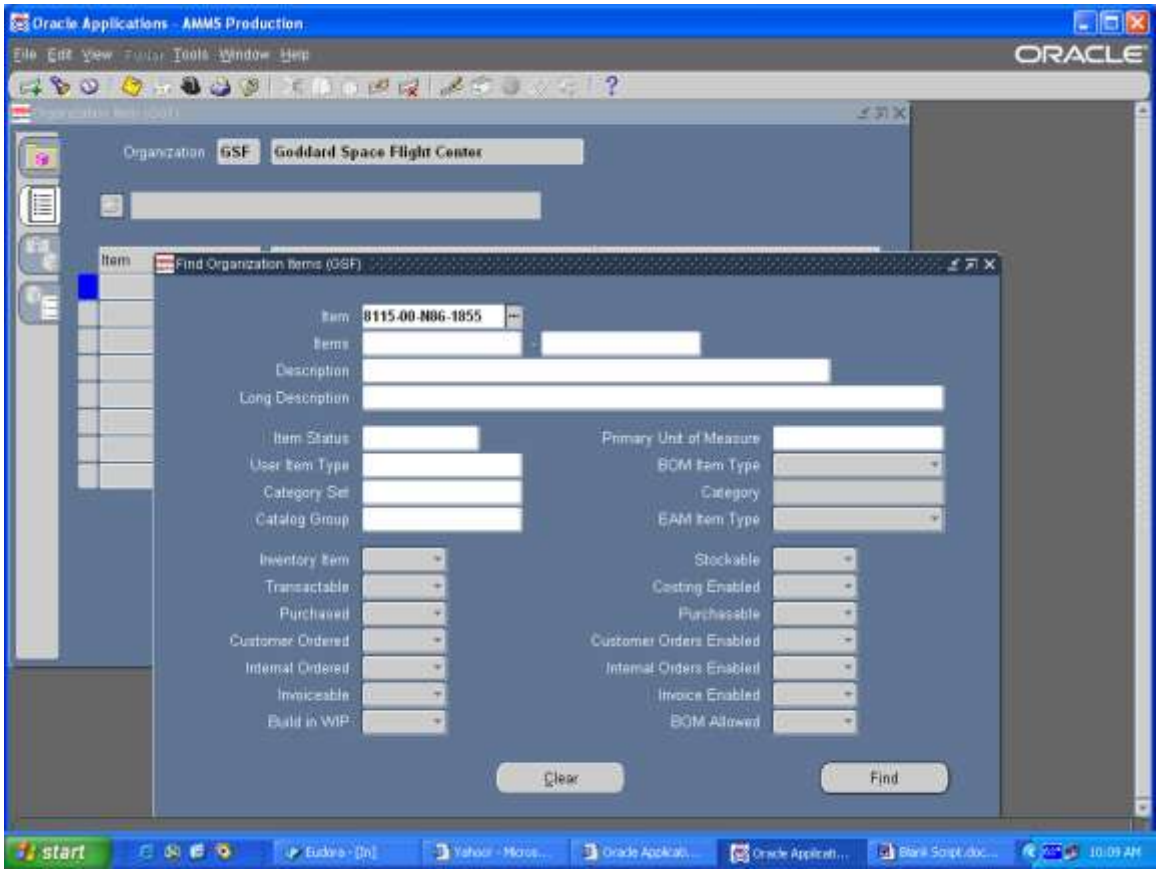
Step Description: From the Organization window select GSF, click OK

Expected Results: Find Organization Items window will appear



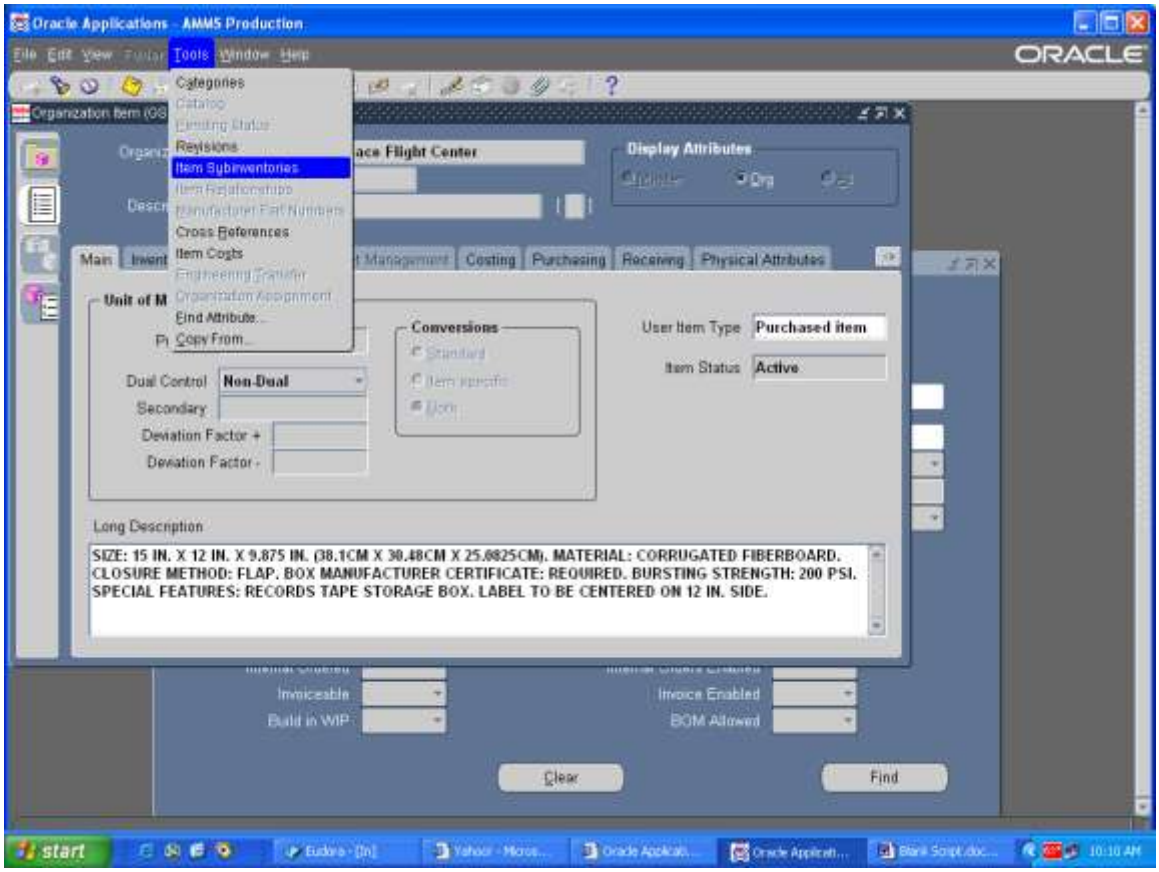
Step Description: At the Find Organizations Items window in the Item field enter the item number you want to assign the locator to, the click on the Find button

Expected Results: Field will be populated and Organization Item window will appear



Step Description: From the toolbar select Tools > Item Sub Inventories

Expected Results: Item Sub Inventory window will appear

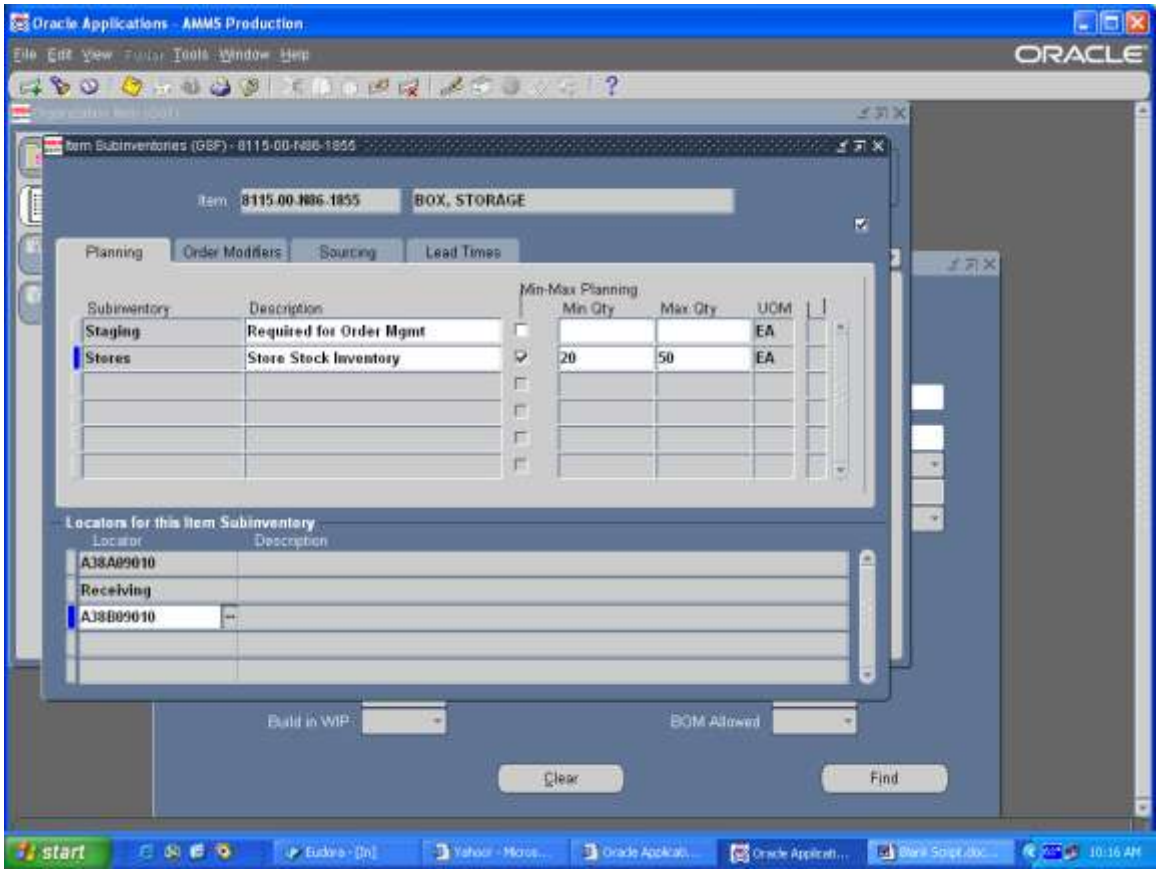


Step Description: At the Item Sub Inventory window select the appropriate sub inventory, NEVER ASSIGN LOCATORS TO STAGING SUB INVENTORY, you will see locators at the bottom of the screen.

Expected Results: Field will be populated

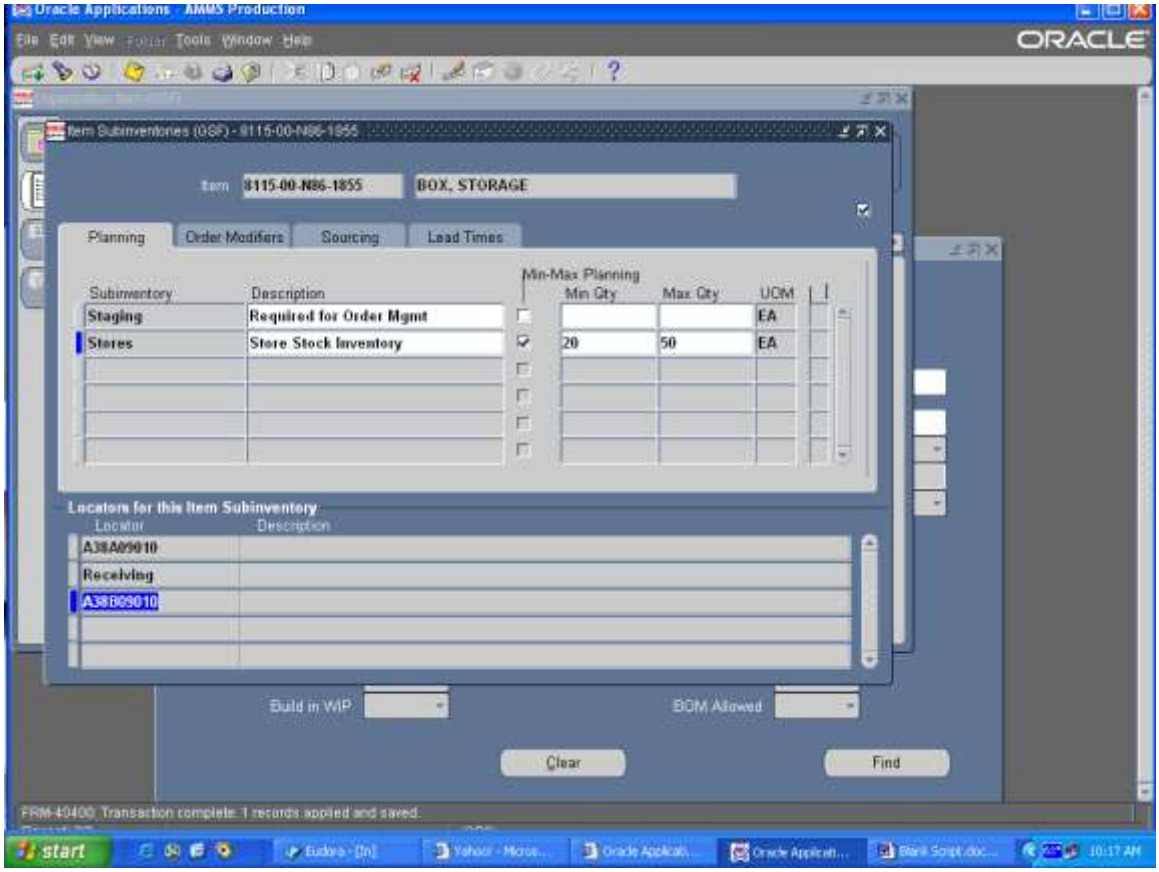
Step Description: At the bottom of the screen in the next available line enter the locator you want to assign to this item

Expected Results: Field will turn white and will be populated



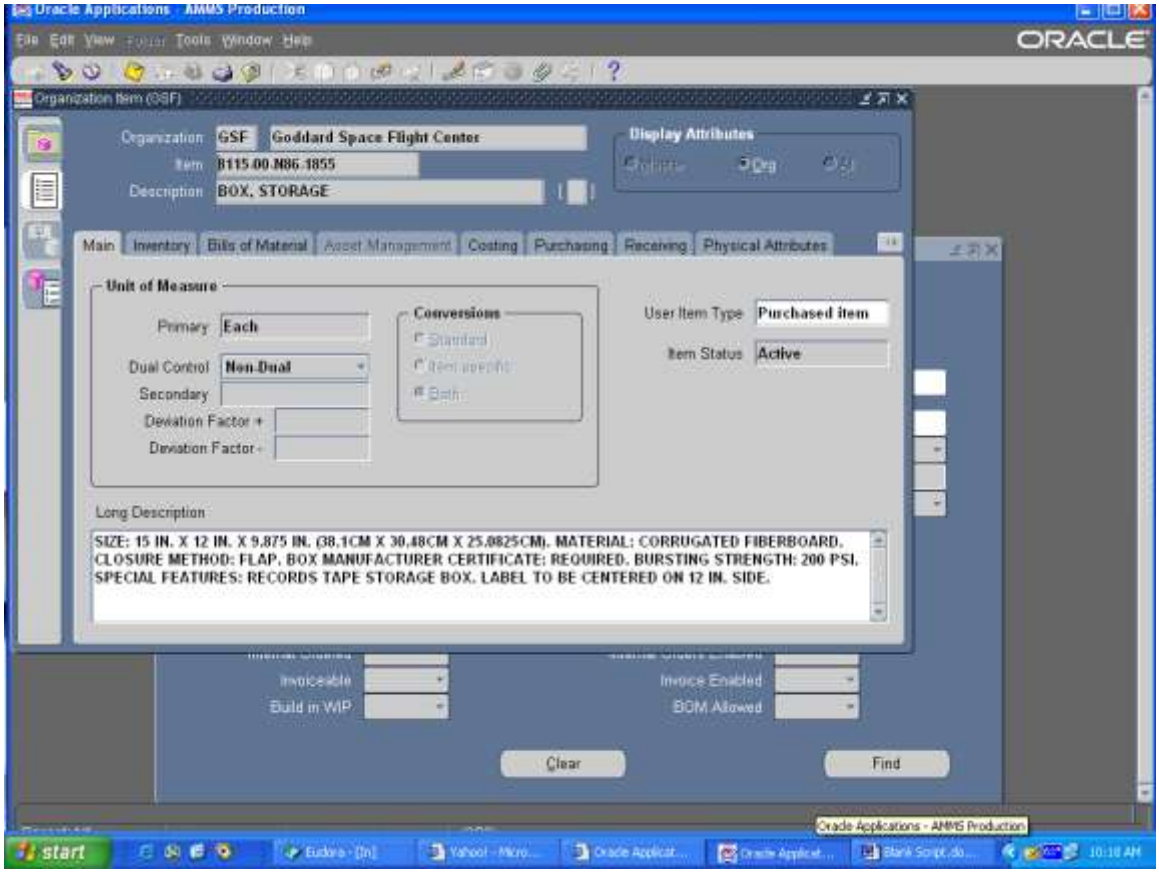
Step Description: Save your work

Expected Results: Transaction Saved and Applied message



Step Description: Close Item Sub Inventory window

Expected Results: Return to Organization Items window



NOTE: To add locators to multiple items, once you are at the Organization Item window from the keyboard hit the F11 button, screen will go blank and fields will turn blue, enter new item number, hold down Ctrl button and hit F11 again, new item number information will appear.

AMMS TRAINING SCRIPT
Adding New Manufacturer

Purpose

The purpose of this training script is to give direction on how to enter a new manufacturer and cage code

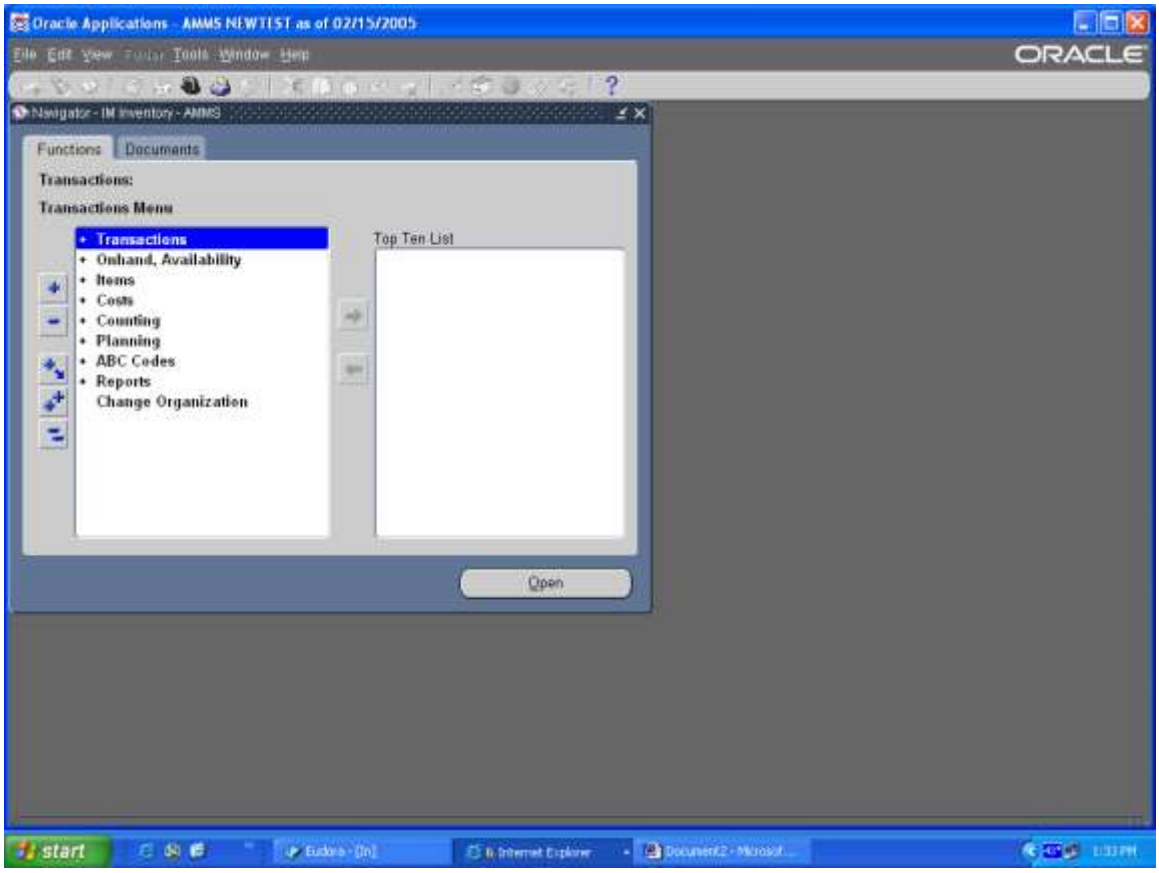
Audience

Material Coordinator and Supply Team Leads

Prepared By	Theresa Coulson
Creation Date:	03/15/2005
Document Name	Add New Manufacturer.doc
Version	2
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Inventory.	

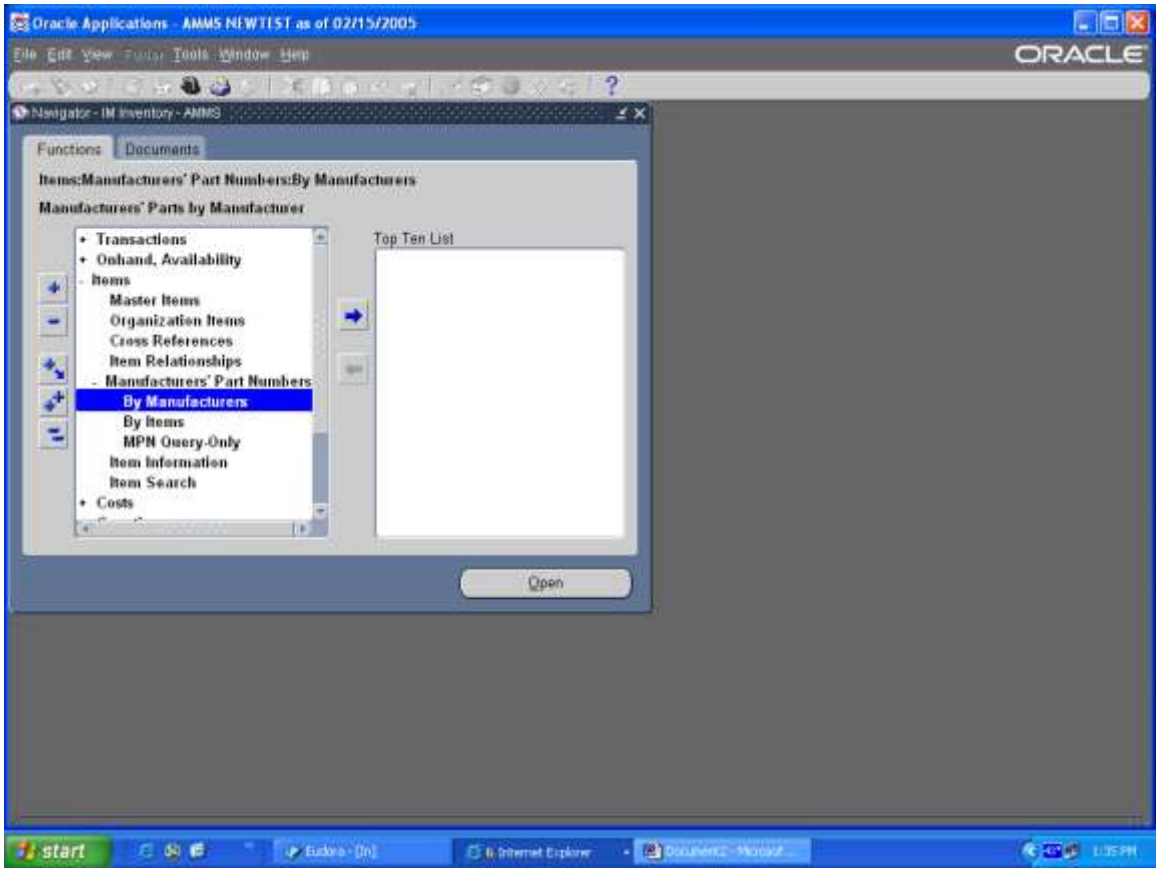
Step Description: Sign onto Oracle and select the Inventory responsibility.

Expected Results: Inventory main menu will appear



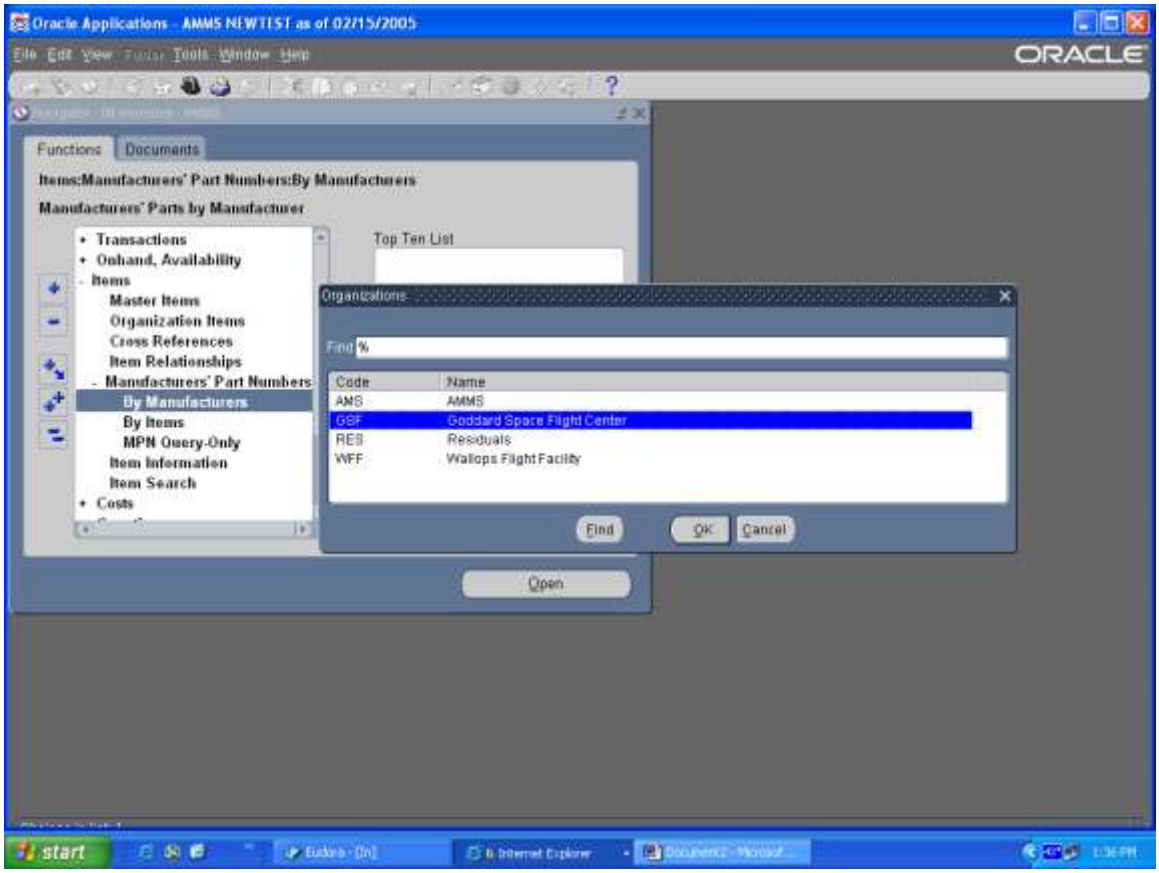
Step Description: Select Items > Manufacturers' Part Numbers > By Manufacturer

Expected Results: Organizations window will appear



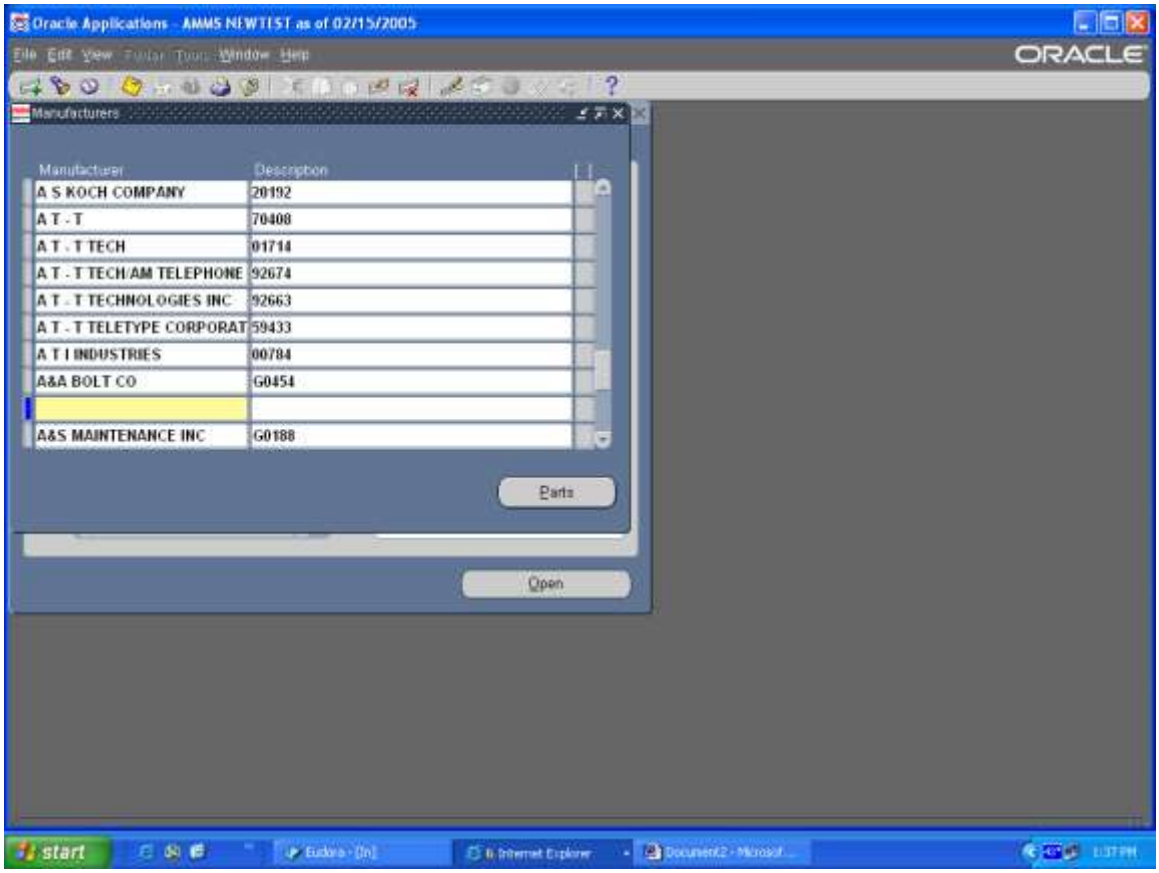
Step Description: Select the appropriate organization. GSF for Goddard, WFF for Wallops.

Expected Results: Manufacturers window will open with existing list of manufacturers.



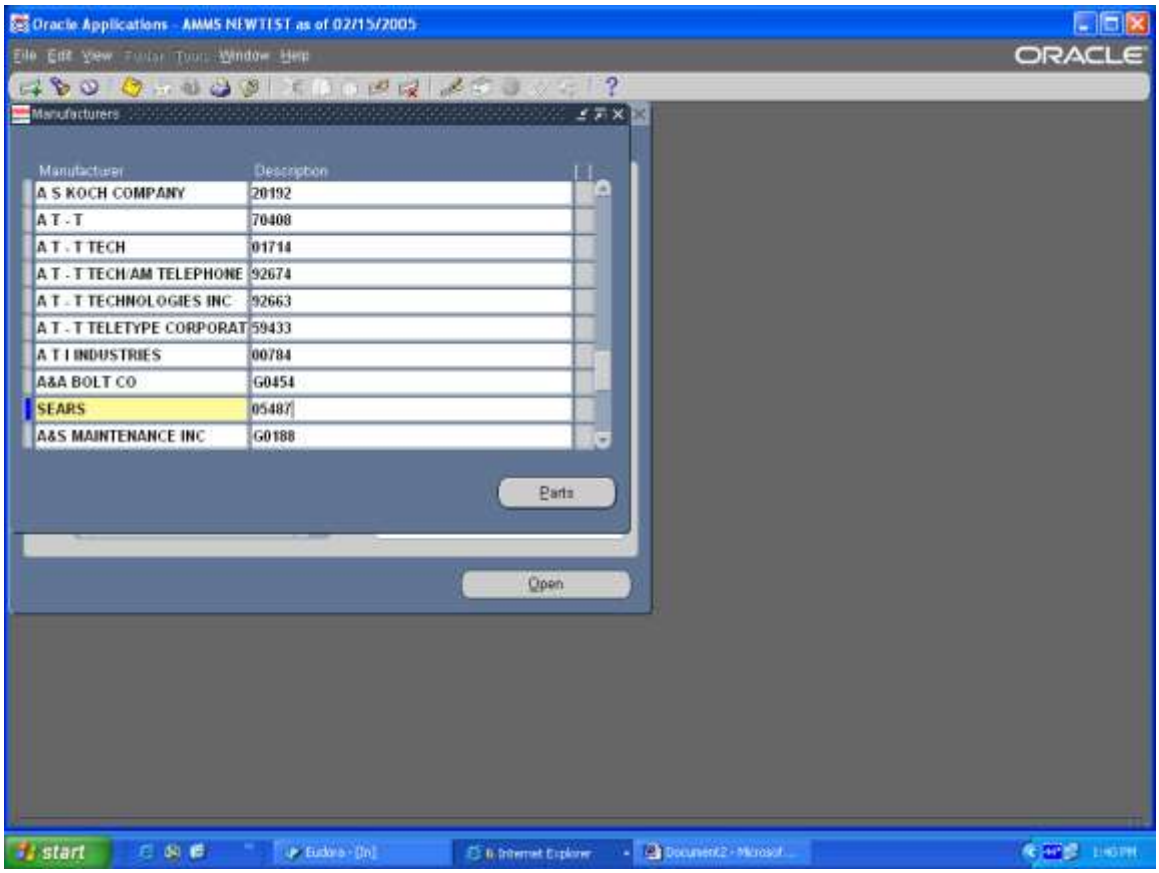
Step Description: To add a new manufacturer and cage code place the cursor in a line with data, then from the tool bar select the icon with the green + sign.

Expected results: This will provide a blank line



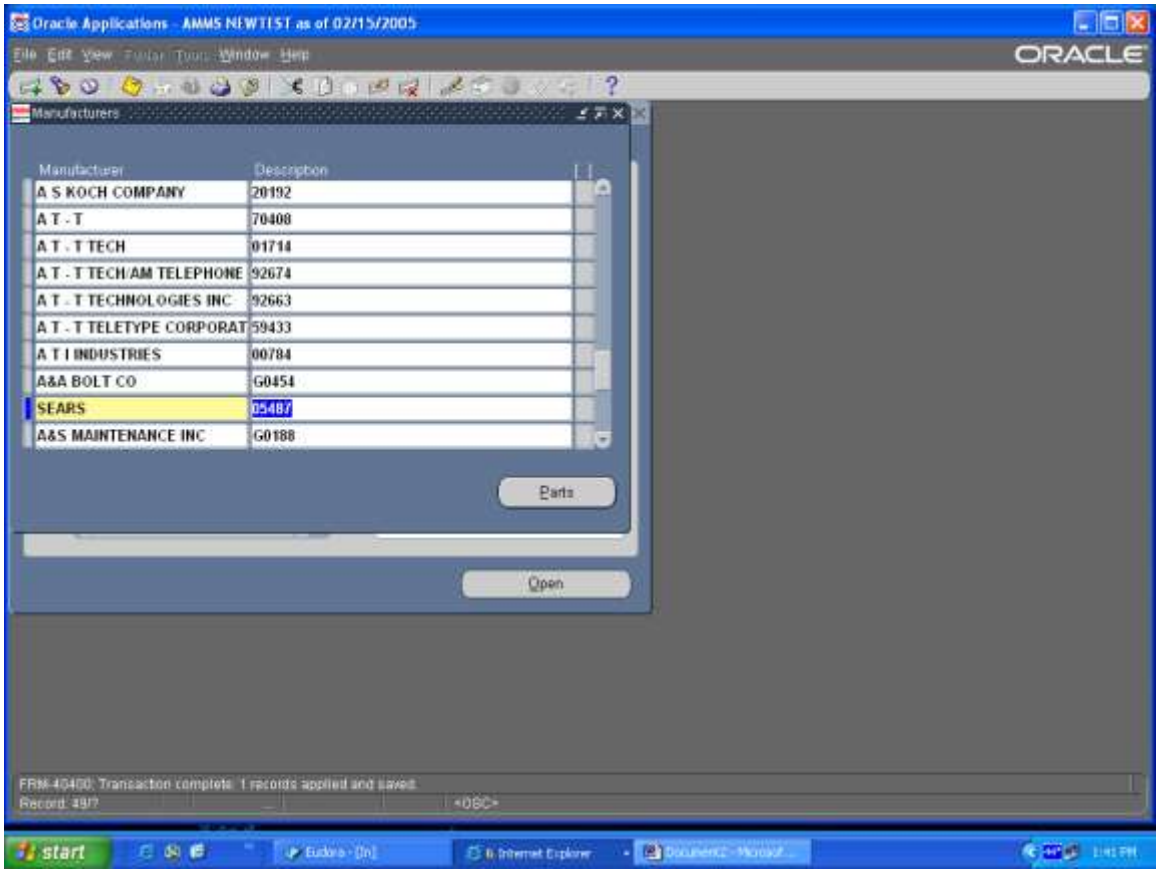
Step Description: In the blank line in the manufacturer column enter the new manufacturers' name, then tab to the description field and enter the cage code for the manufacturer.

Expected Results: Fields will be populated.



Step Description: Save your work.

Expected Results: Transaction complete, record saved and applied message at bottom of screen.



Transaction complete.

AMMS TRAINING SCRIPT
ADDING A NEW ITEM TO ORACLE

Purpose

The purpose of this training script is to demonstrate how a Material Coordinators and Supply Technician Lead add a new stock number to the Oracle data base. After the item has been added to the system you also have to add it to BOTH Master Price Lists (GSF and WFF).

Audience

Material Coordinator and Supply Technician Leads

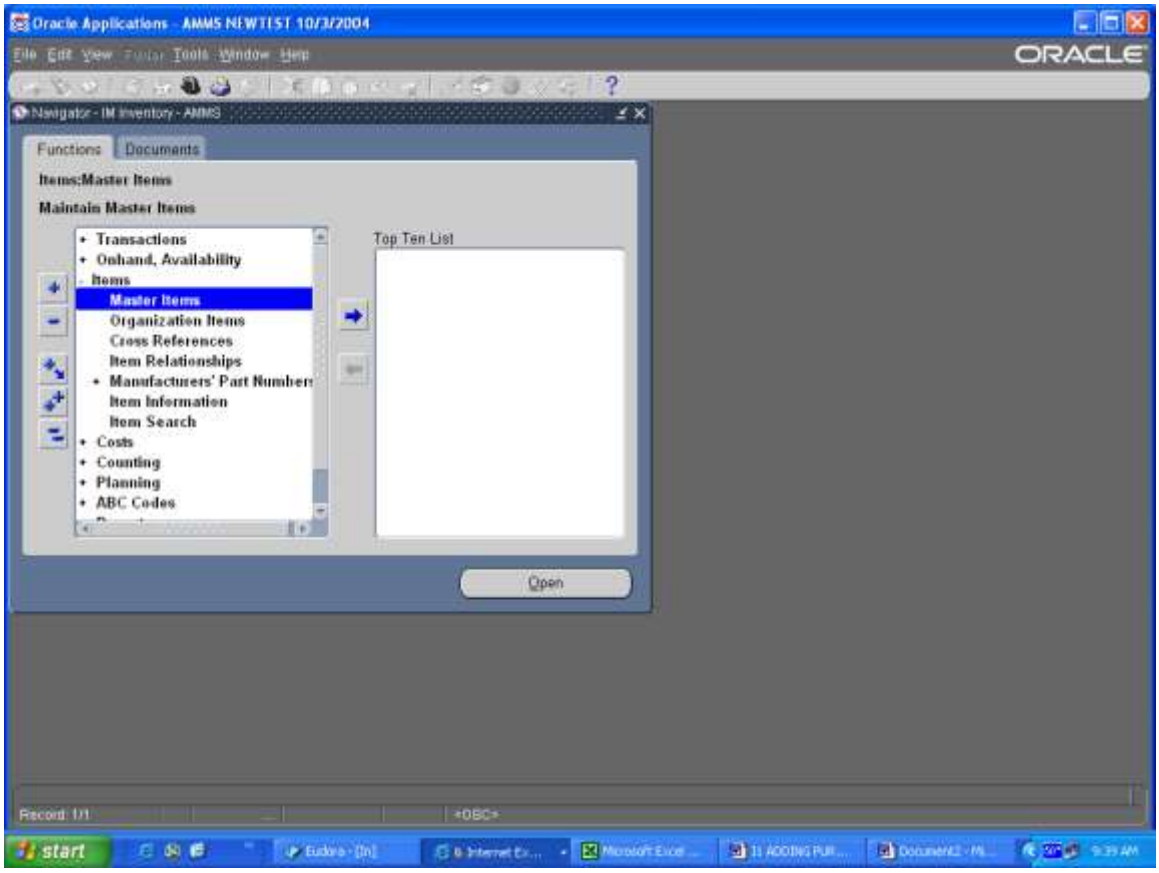
Prepared By	Theresa Coulson
Creation Date:	11/05/2004
Document Name	AMMS Create New Item Number.doc
Version	3
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Inventory.	

Step Description: Sign on to Oracle Applications and Select User Responsibility “IM Inventory AMMS”

Expected Results/Actions: Oracle Displays the Inventory main Menu

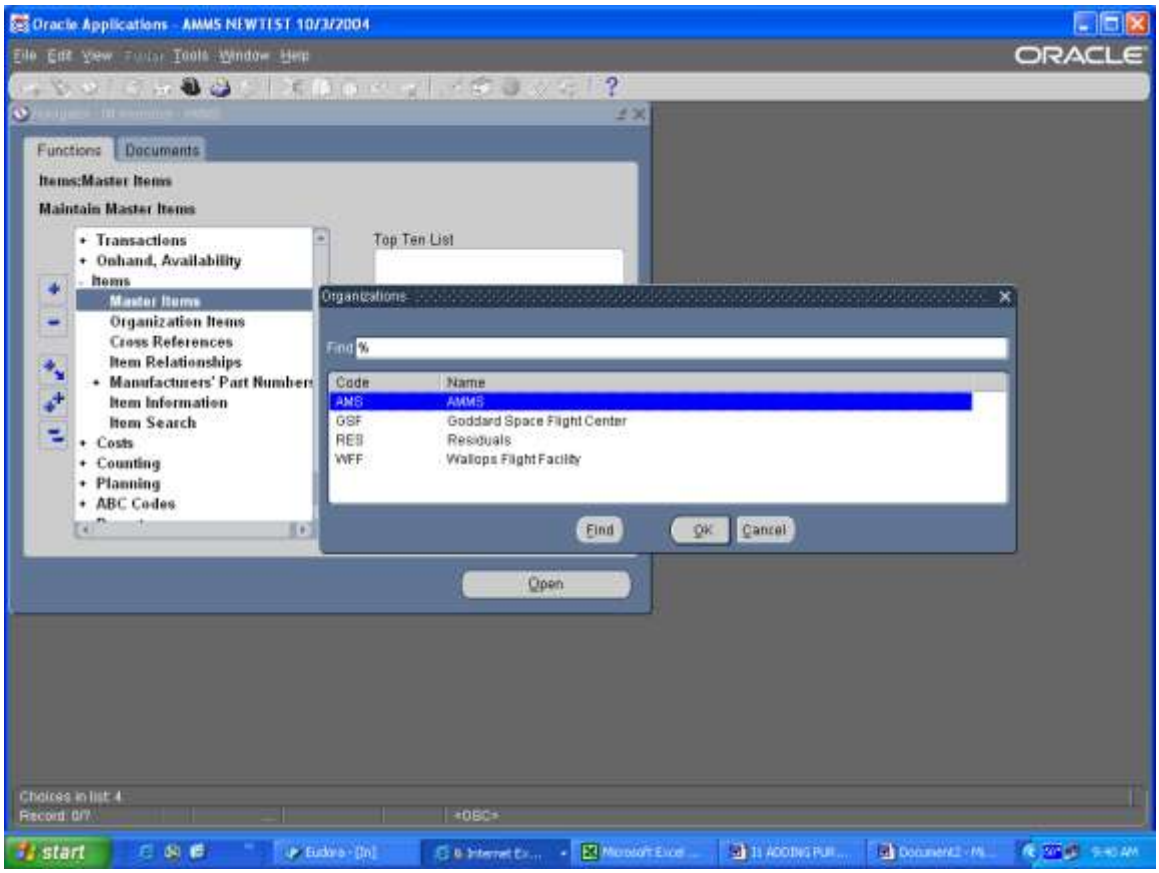
Step Description: Select “Items” then “Master Items”

Expected Results/Actions: Organization form opens.



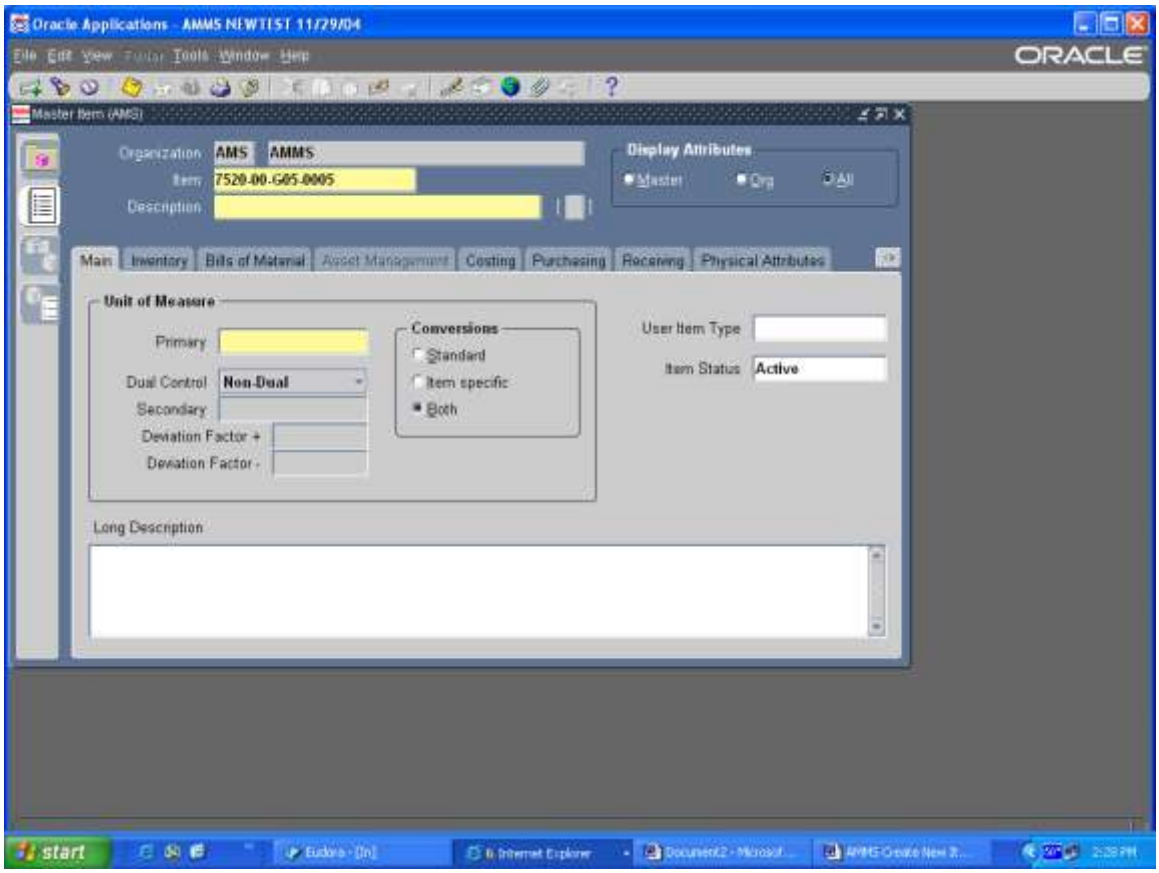
Step Description: Select “AMS” as the Organization and Click OK

Expected Results/Actions: Blank Master form opens.



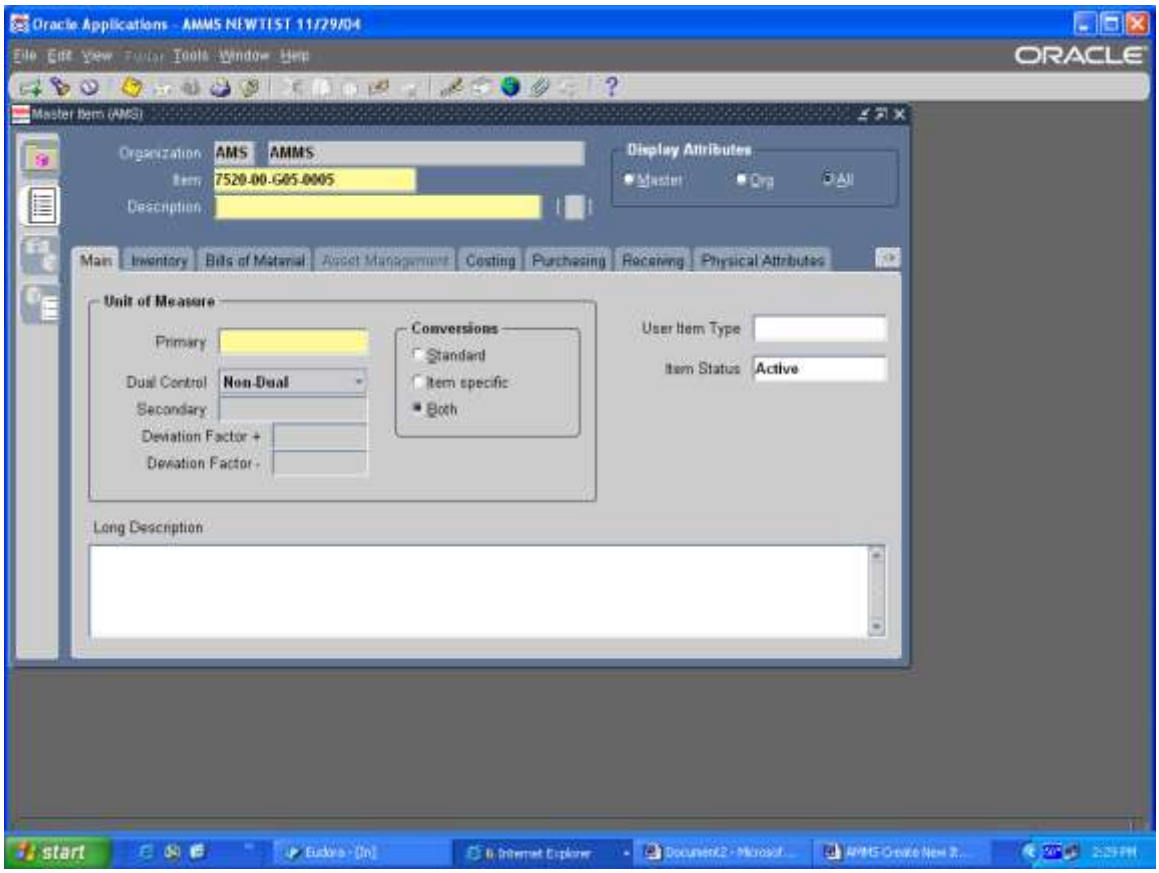
Step Description: Enter the New Item Number

Expected Results/Actions: Field is Populated.



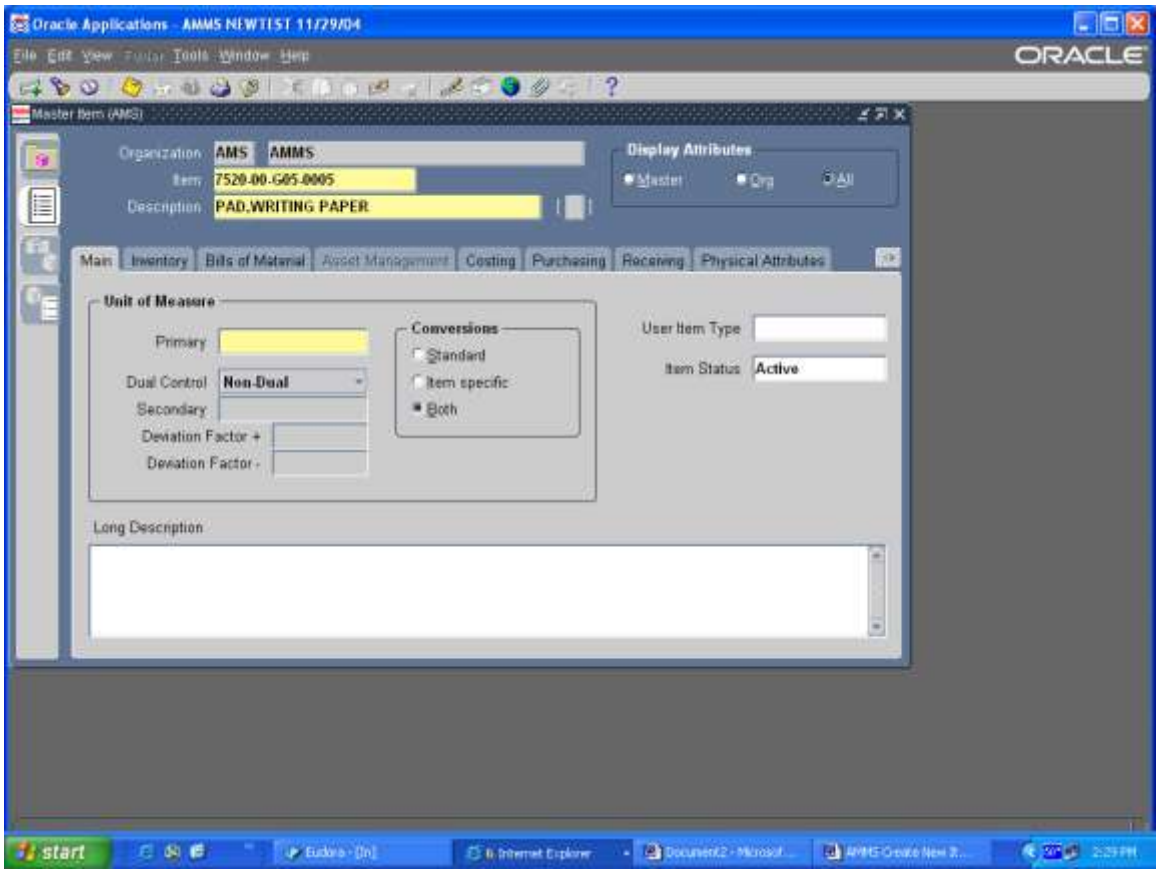
Step Description: Click on the Description Field

Expected Results/Actions: Cursor moves.



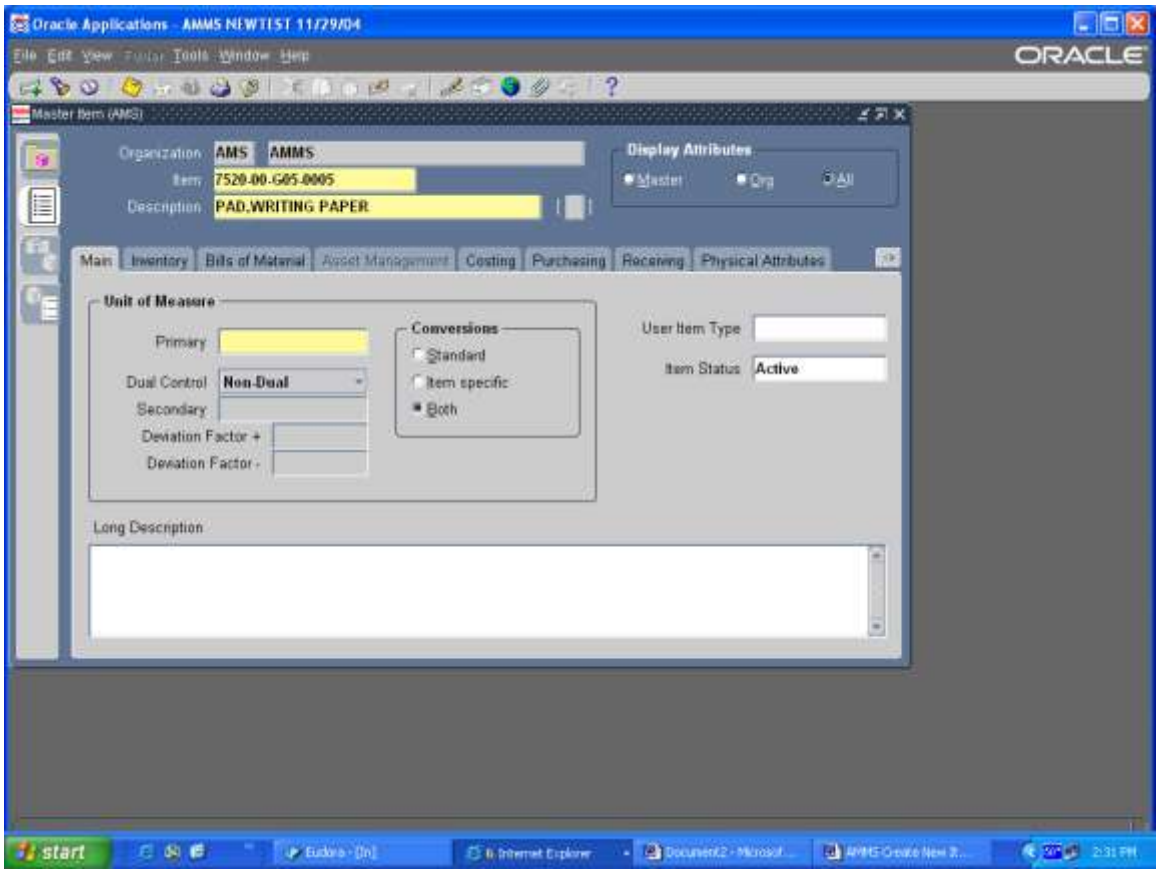
Step Description: Enter an Abbreviated Description (noun) for the item

Expected Results/Actions: Field is Populated.



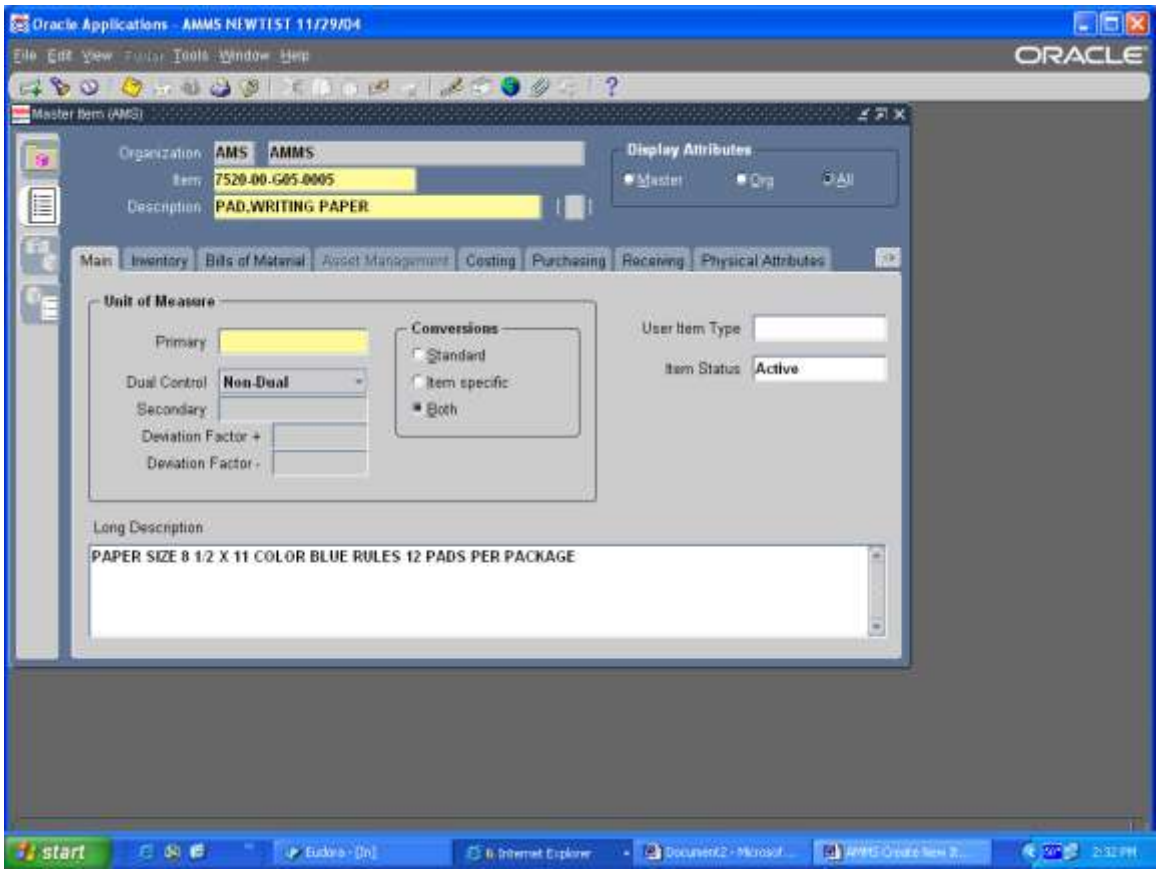
Step Description: Click on the Long Description field at the bottom of the screen

Expected Results/Actions: Cursor moves



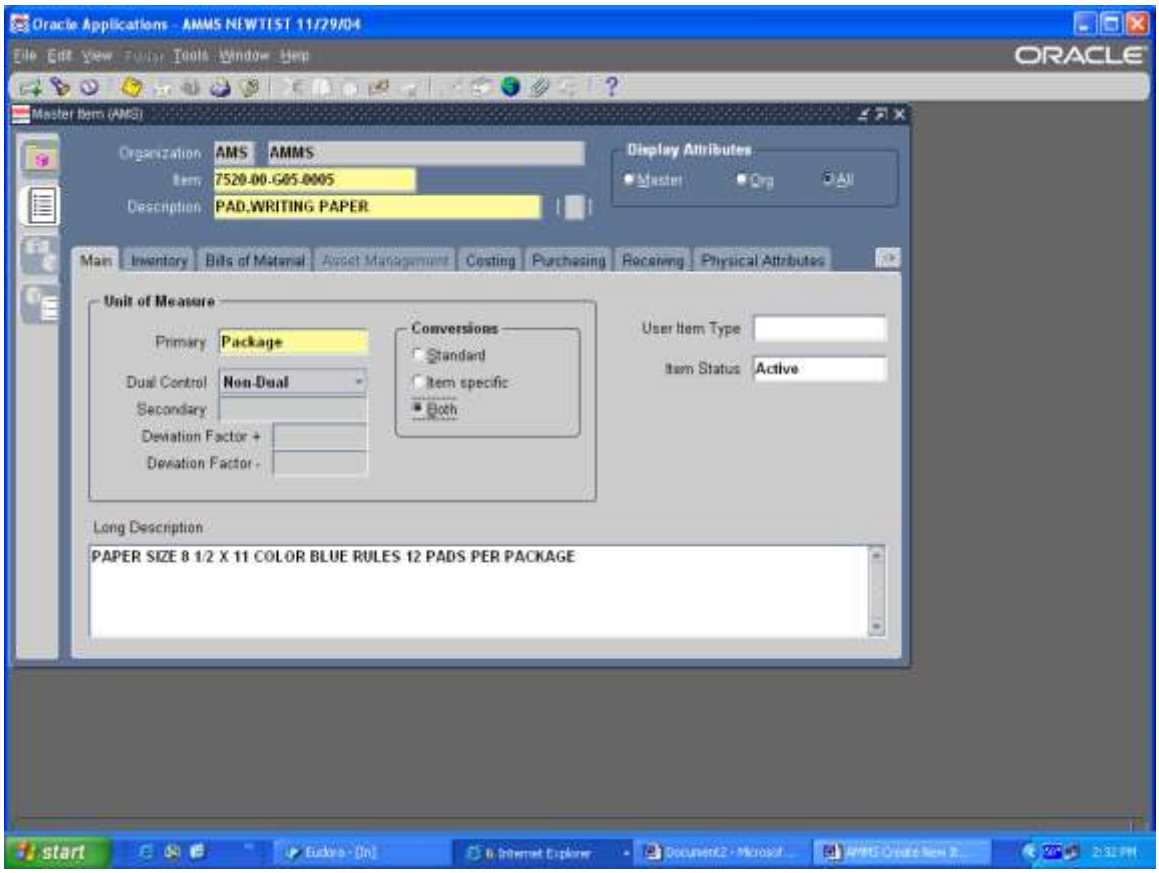
Step Description: Enter the Entire Item Description.

Expected Results/Actions: Field is Populated.



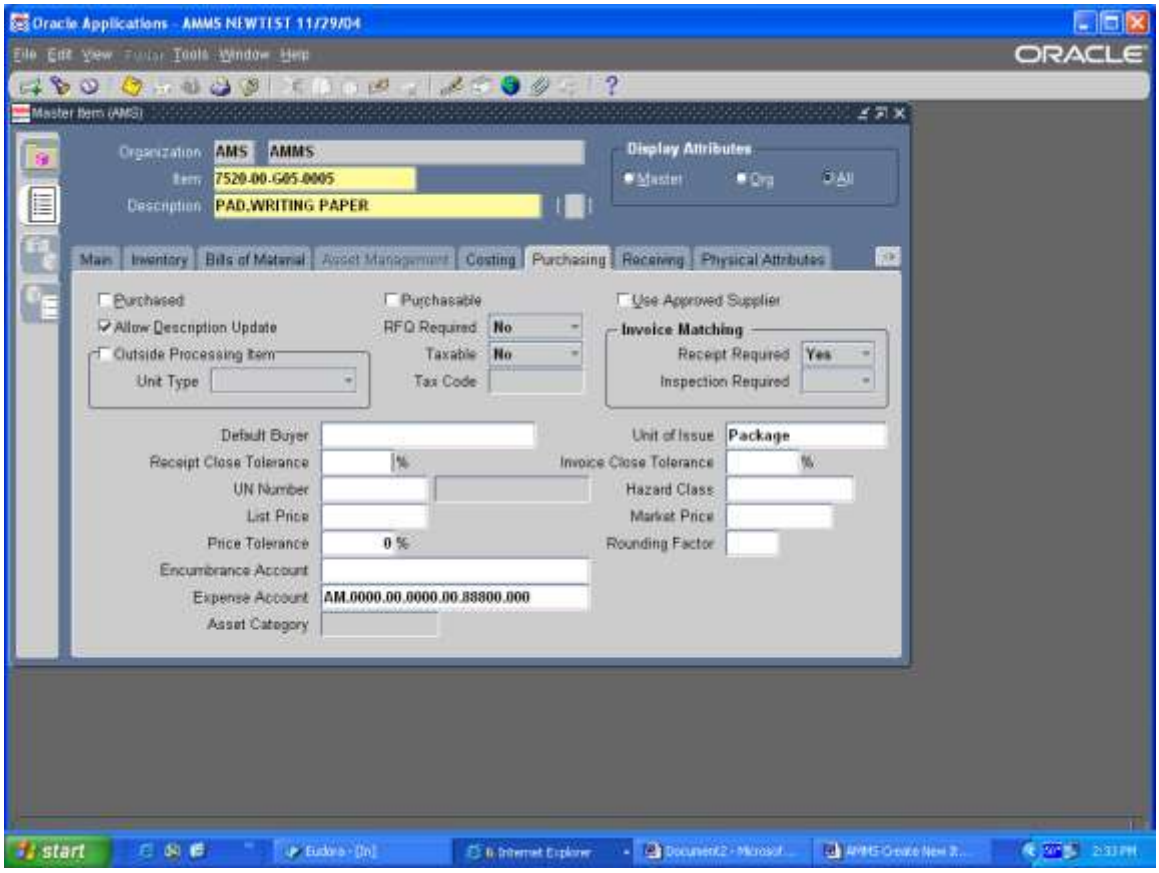
Step Description: Click on the Primary Unit of Measure field and change if necessary from List of Values (LOV) then Click OK **Please remember to select the correct Primary UOM as to this field can never be changed.**

Expected Results/Actions: U/I is updated



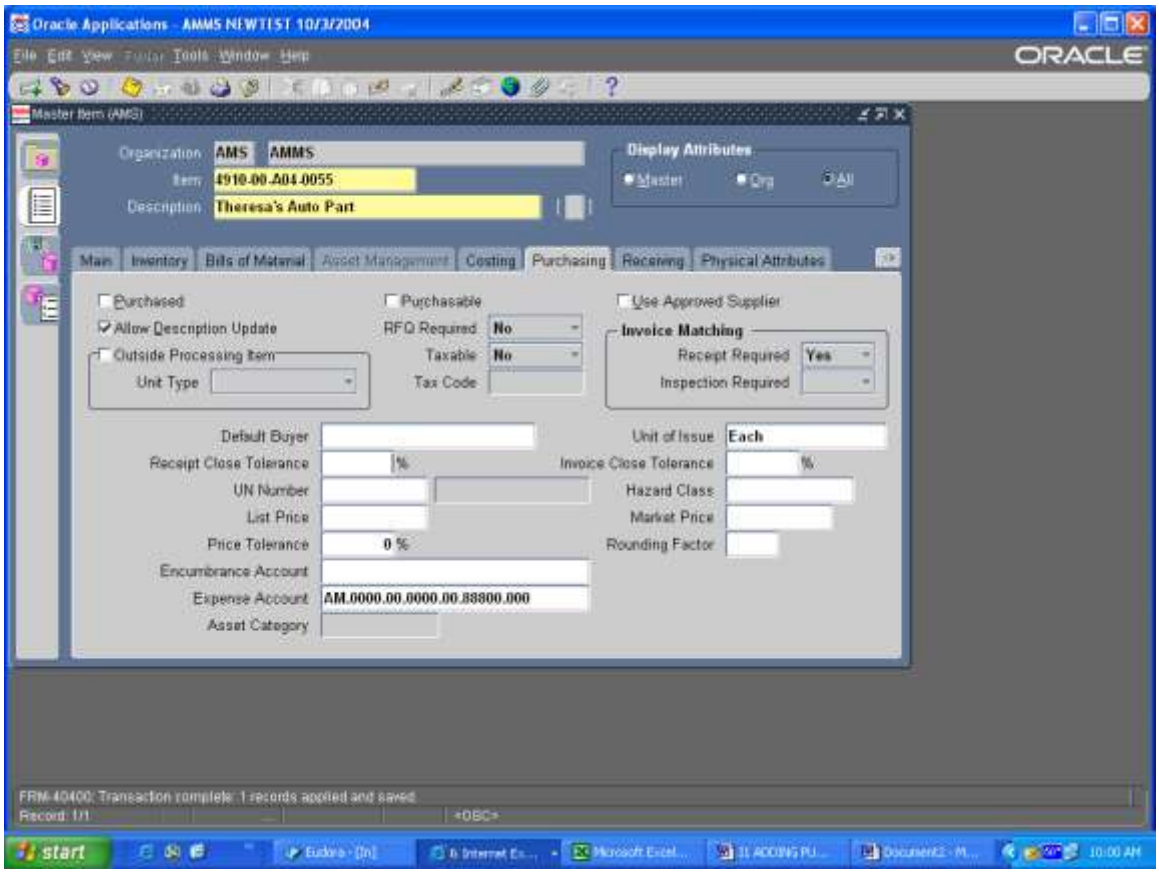
Step Description: Navigate to the Purchasing Tab, go to the Unit of Issue field and select the Unit of Issue from the LOV, this should match the Primary UOM.

Expected Results/Actions: Purchasing Unit of Issue is changed



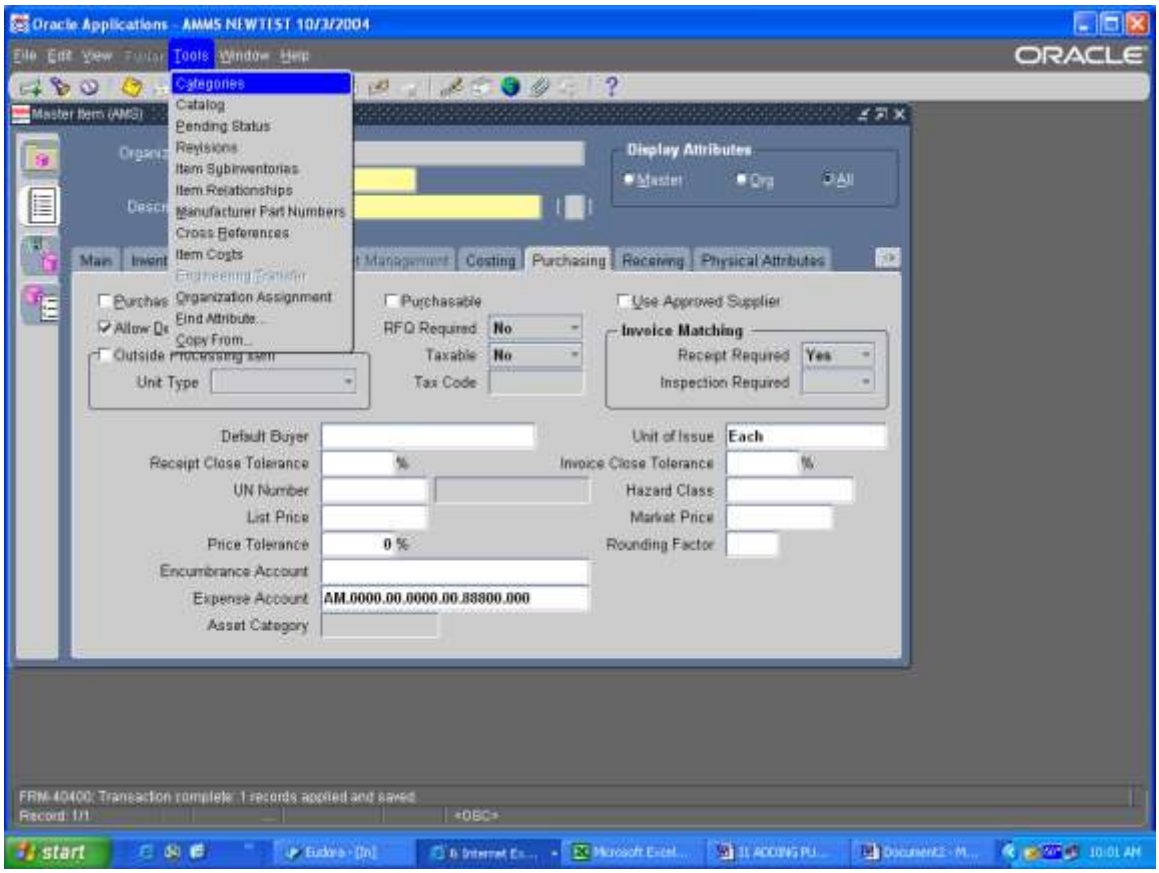
Step Description: Save Information Entered

Expected Results/Actions: Transaction Complete Message at the bottom of the form.



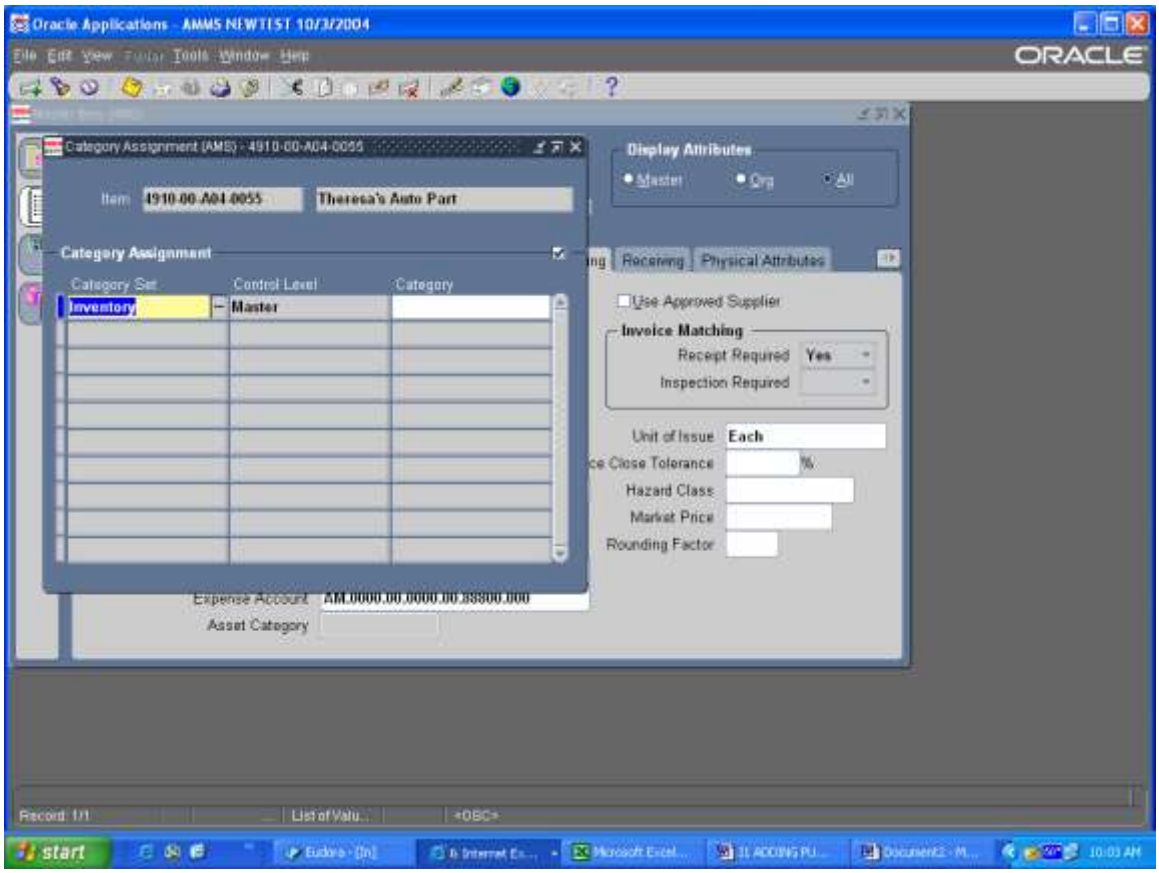
Step Description: Navigate to “Tools” and choose “Categories

Expected Results: Category form opens.



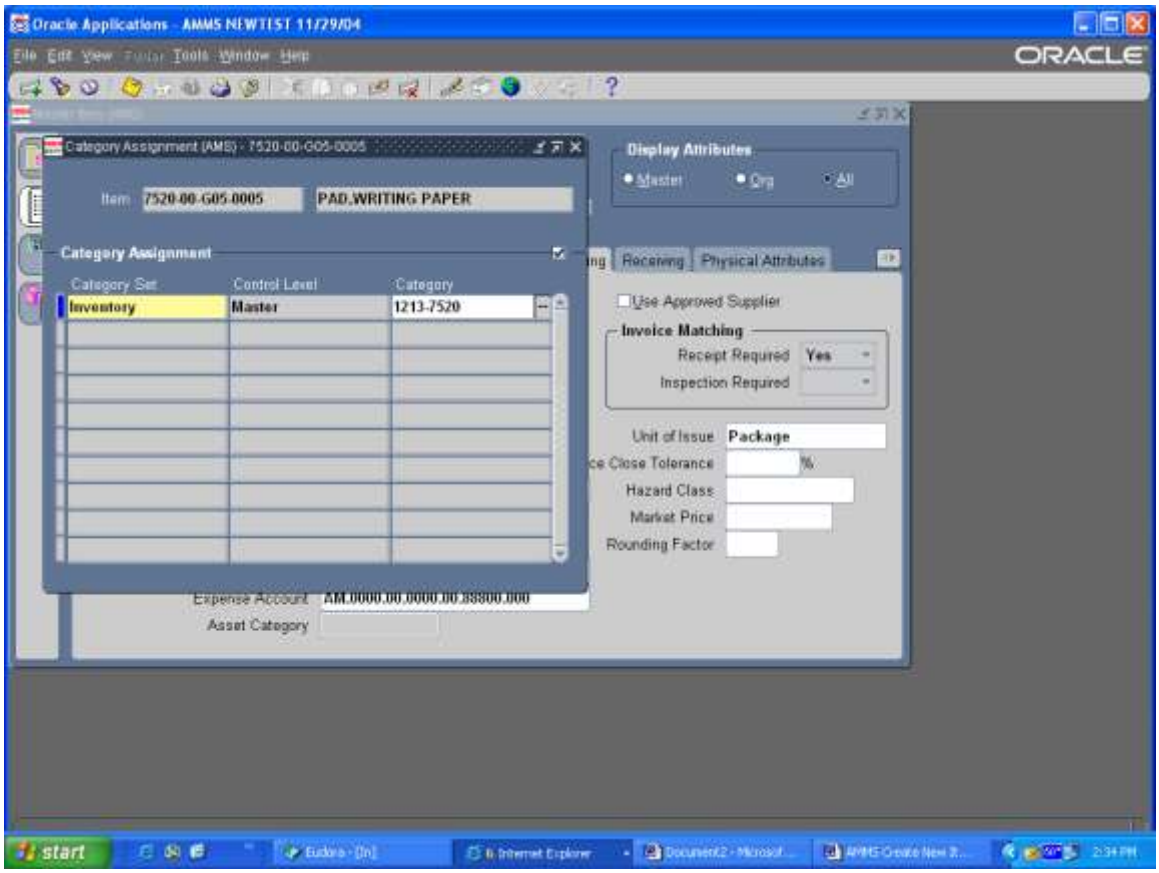
Step Description: At the Category Set field click on the LOV and choose “Inventory”

Expected Results/Actions: Field is Populated.



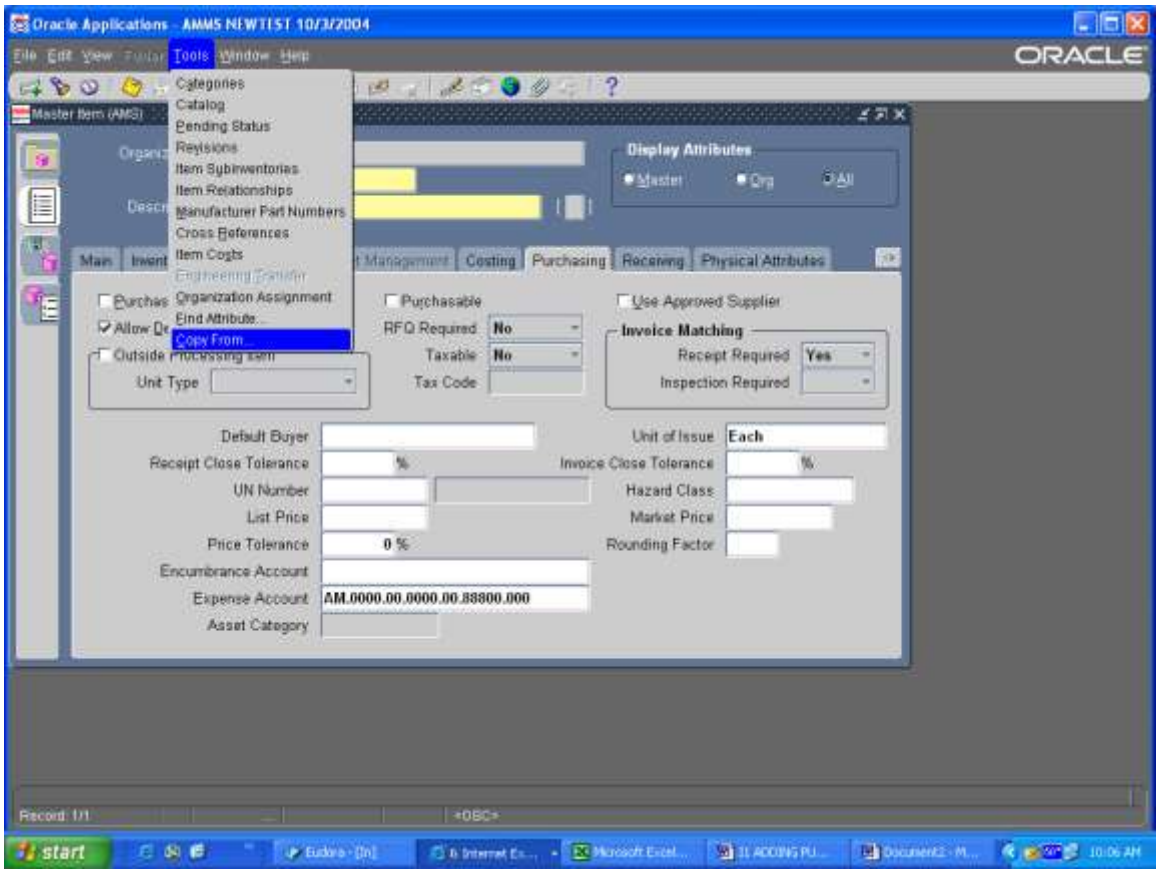
Step Description: Tab to Category and Enter the Correct Category, NASA INVENTORY ACCOUNT CODE (NIAC) for that new item number, SAVE and CLOSE form. A list of NIAC is included.

Expected Results/Actions: Transaction Complete Message at the bottom of the form.



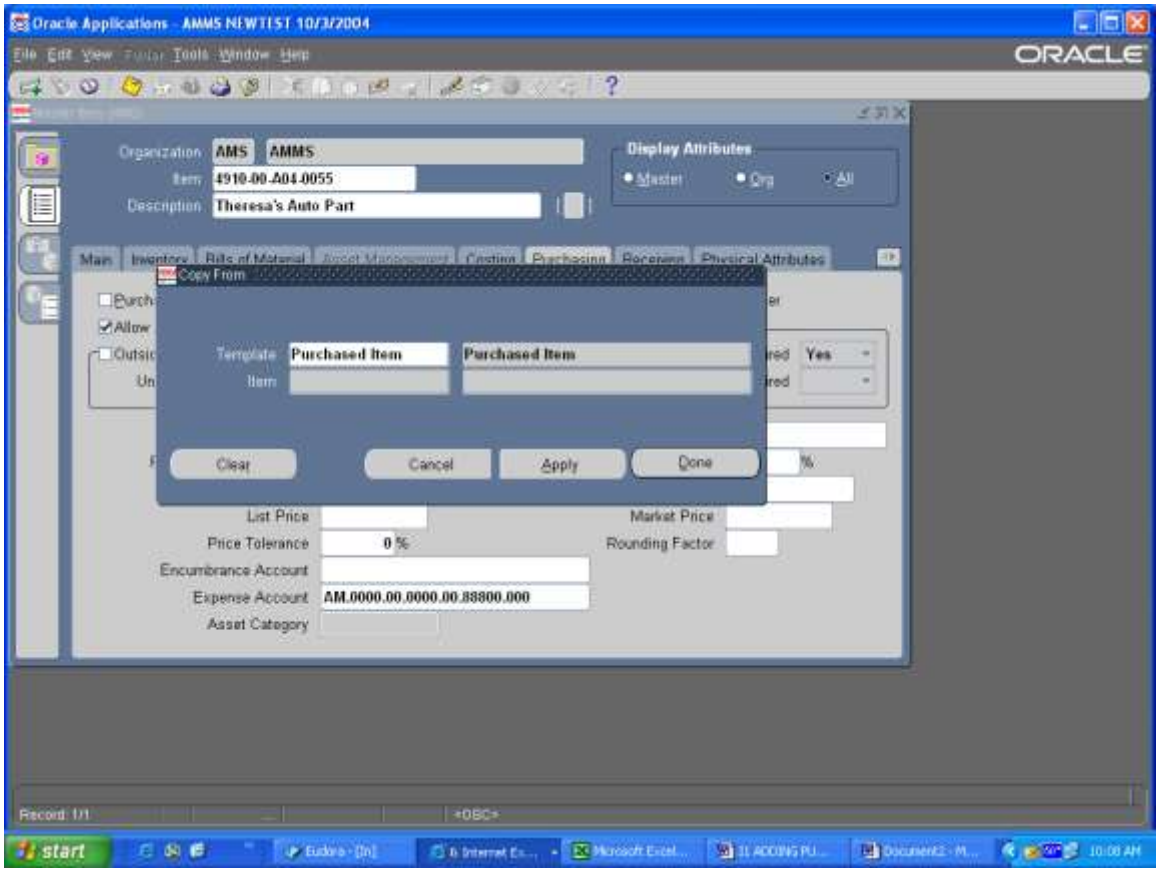
Step Description: Navigate to “Tools” and choose “Copy From”

Expected Results/Actions: Copy From form opens



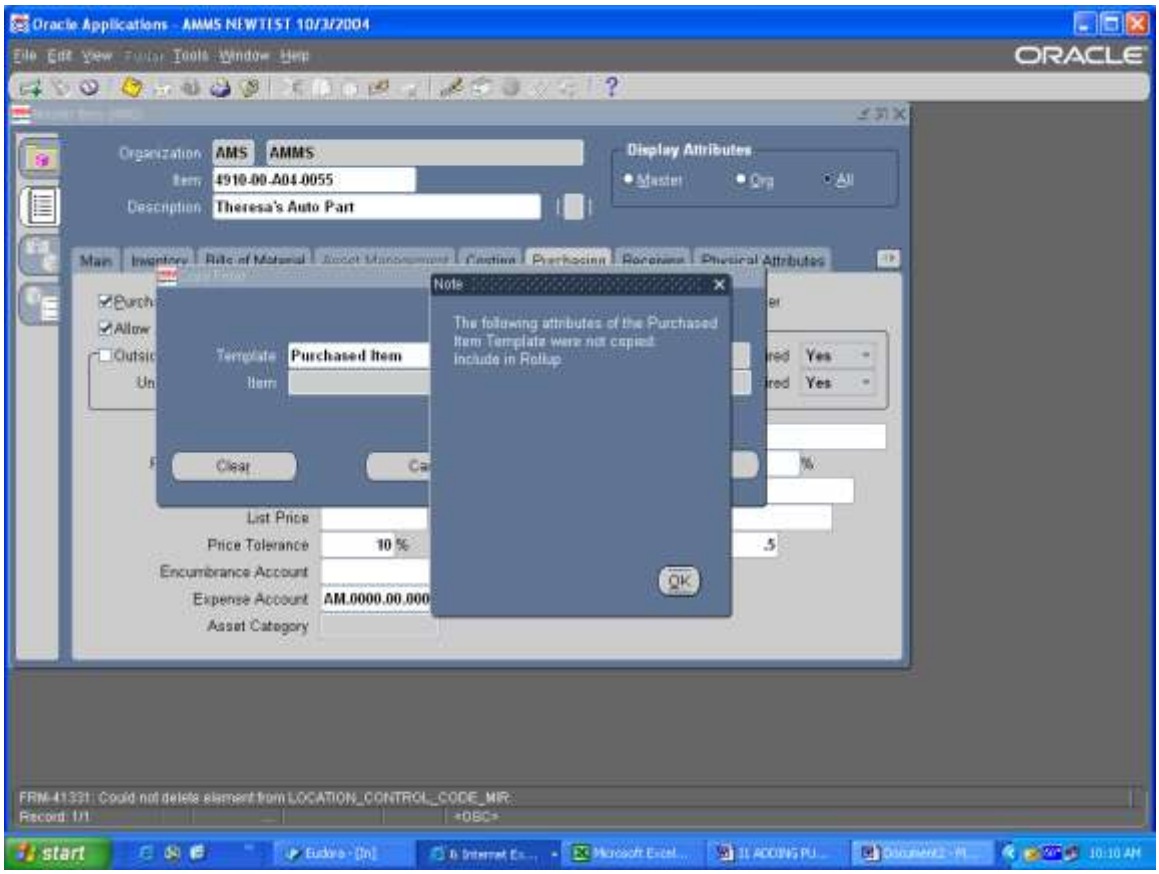
Step Description: Click on the LOV and select item type that you are loading. To copy an Item Template. Click “Apply” then click “Done”

Expected Results/Actions: Note Message will appear



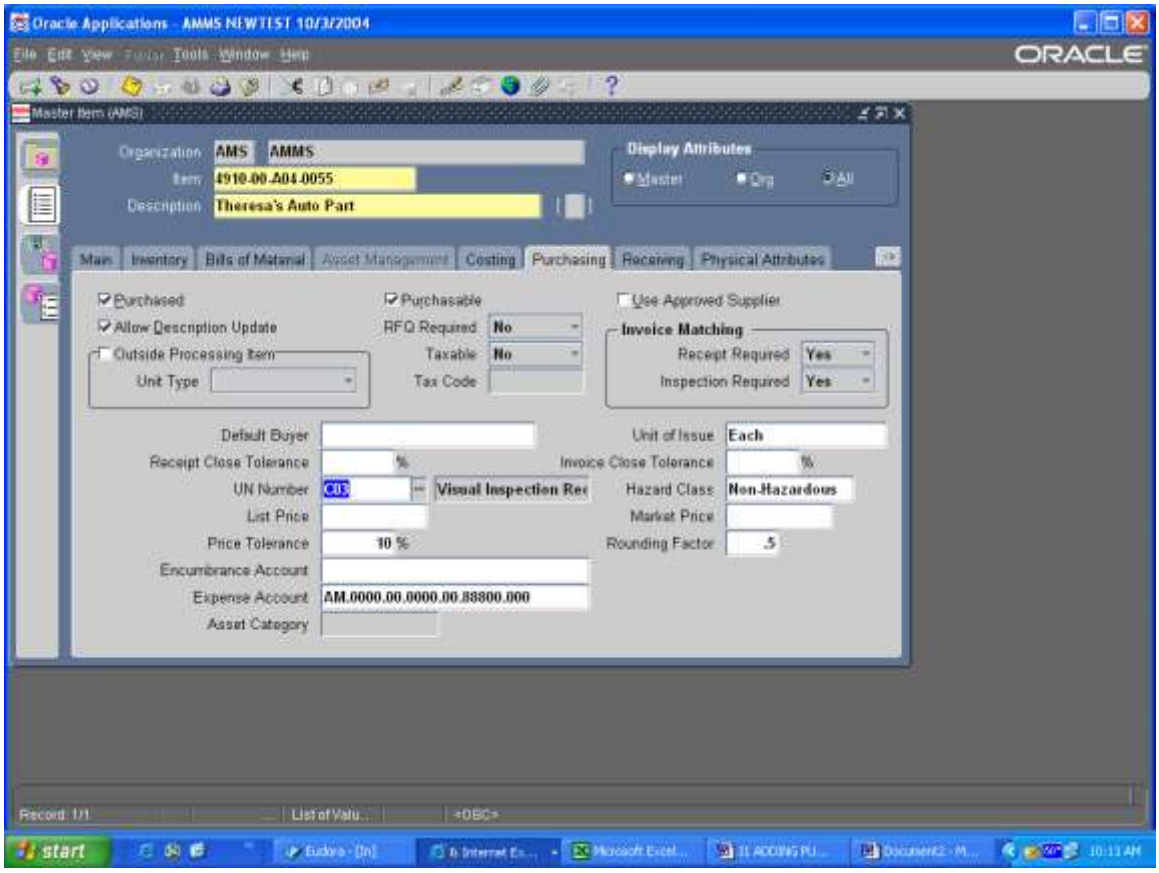
Step Description: Note Window will appear with message “The following attributes of the Purchased Item Template were not copied: Include in Roll UP. Click OK to this Note.

Expected Results/Actions: Window will close, Returns to the Master Items form with “Template Implemented” message at the bottom of the form.



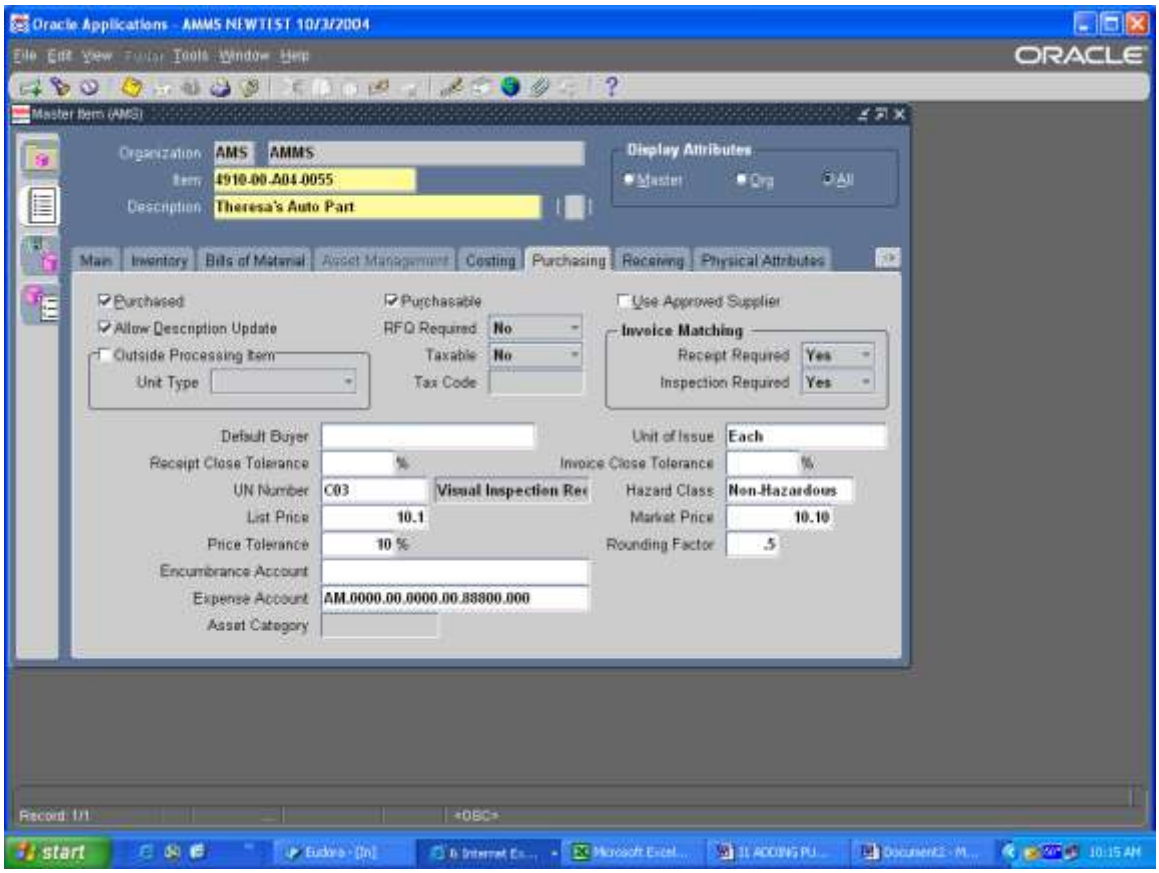
Step Description: Navigate to the “Purchasing” Tab and verify the UN code it will default to CO3 if different change UN code.

Expected Results/Actions: Field is Populated.



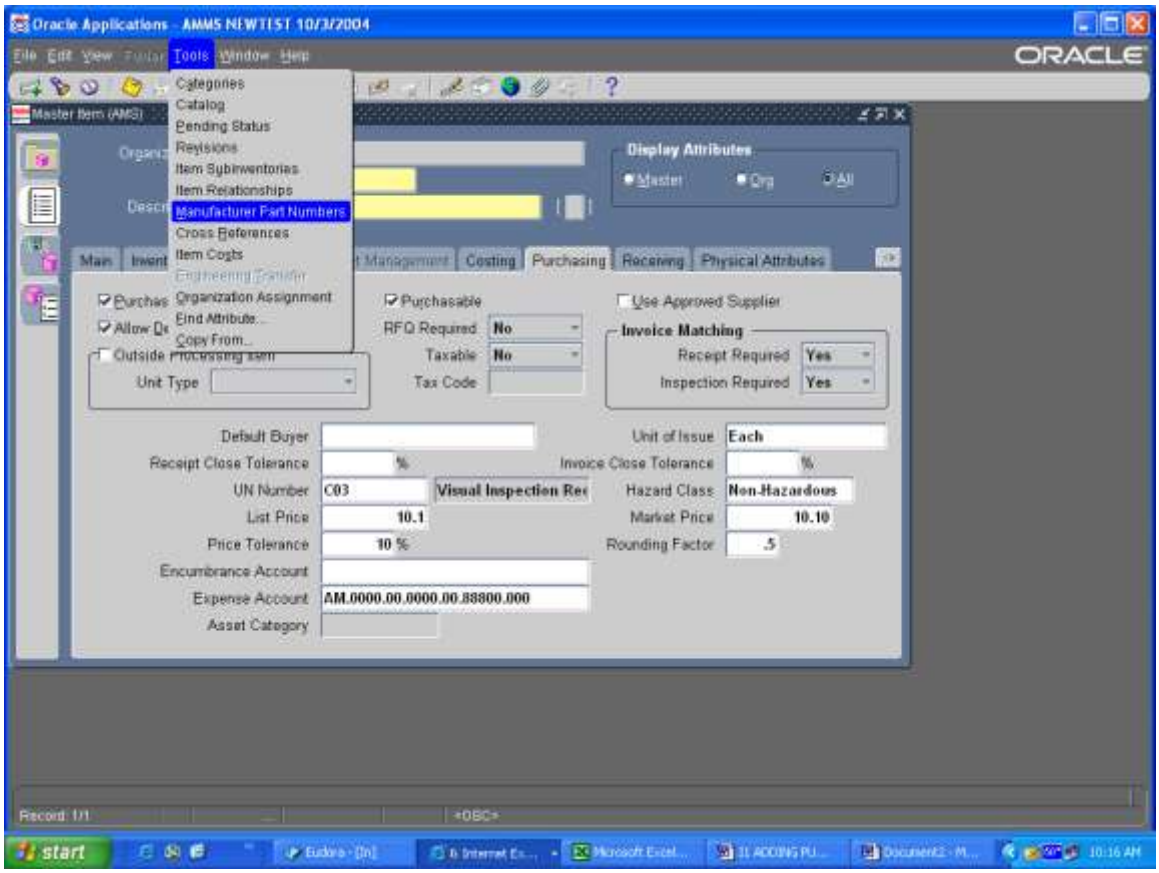
Step Description: At the “Purchasing” Tab enter the “List and Market Price” of the item

Expected Results/Actions: Fields are Populated



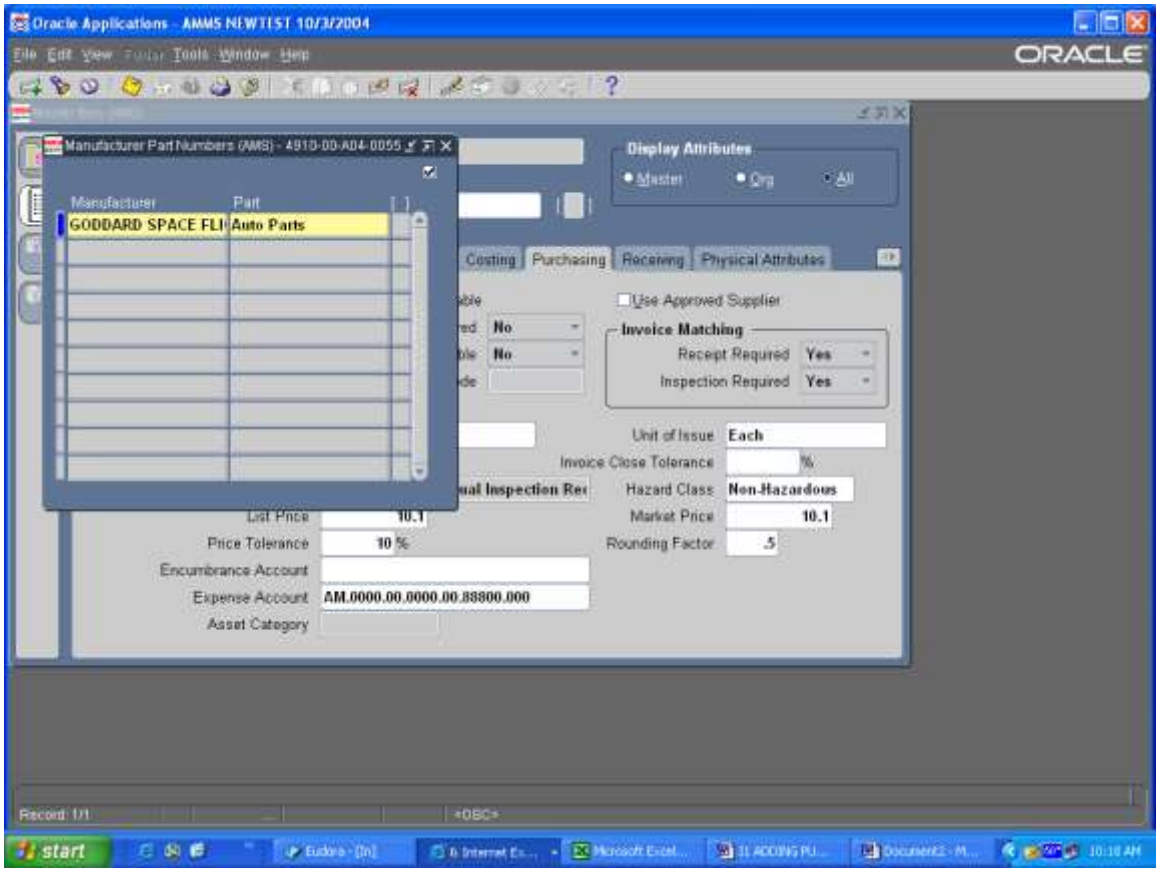
Step Description: Navigate to “Tools” and choose “Manufacturer Part Number”

Expected Results/Actions: Manufacturer Form is opened



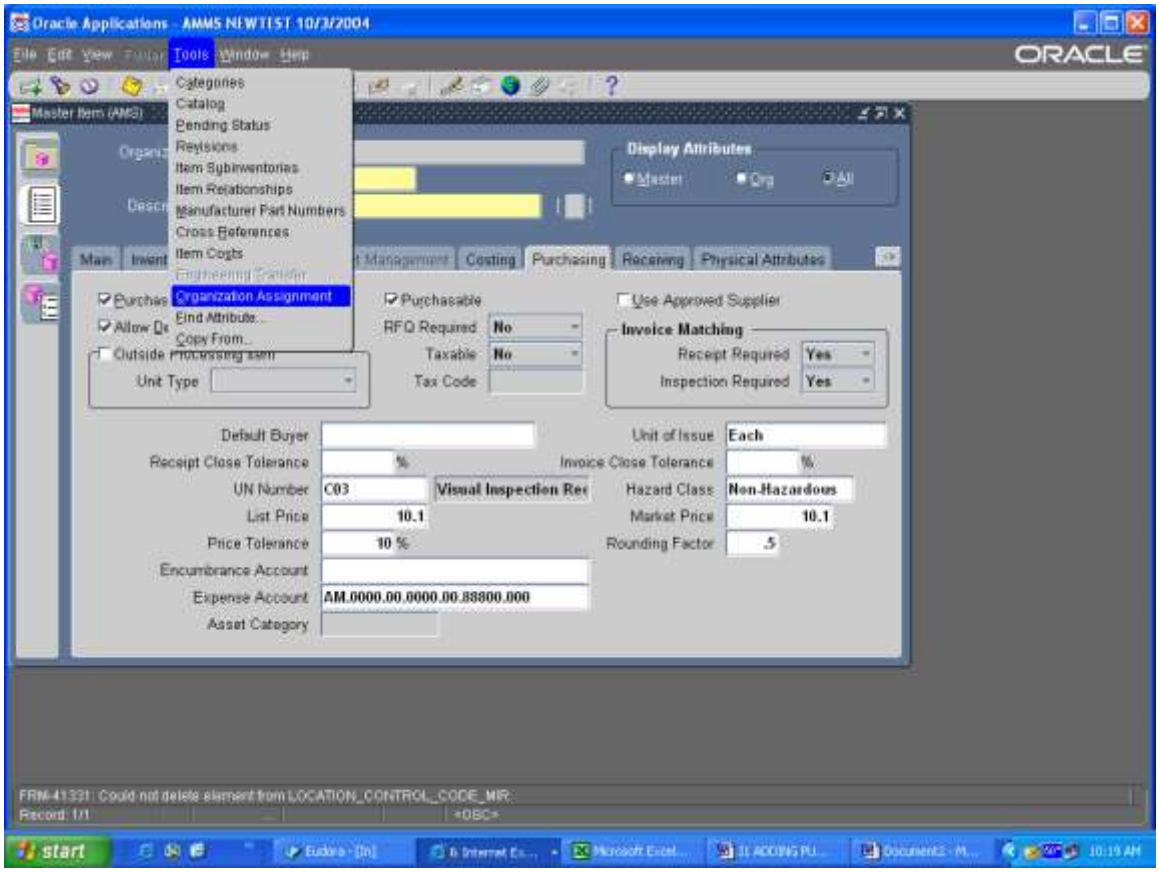
Step Description: Choose the Manufacture from the LOV and enter the part number. Click on “Save” then close the form.

Expected Results/Actions: Manufacture information is populated



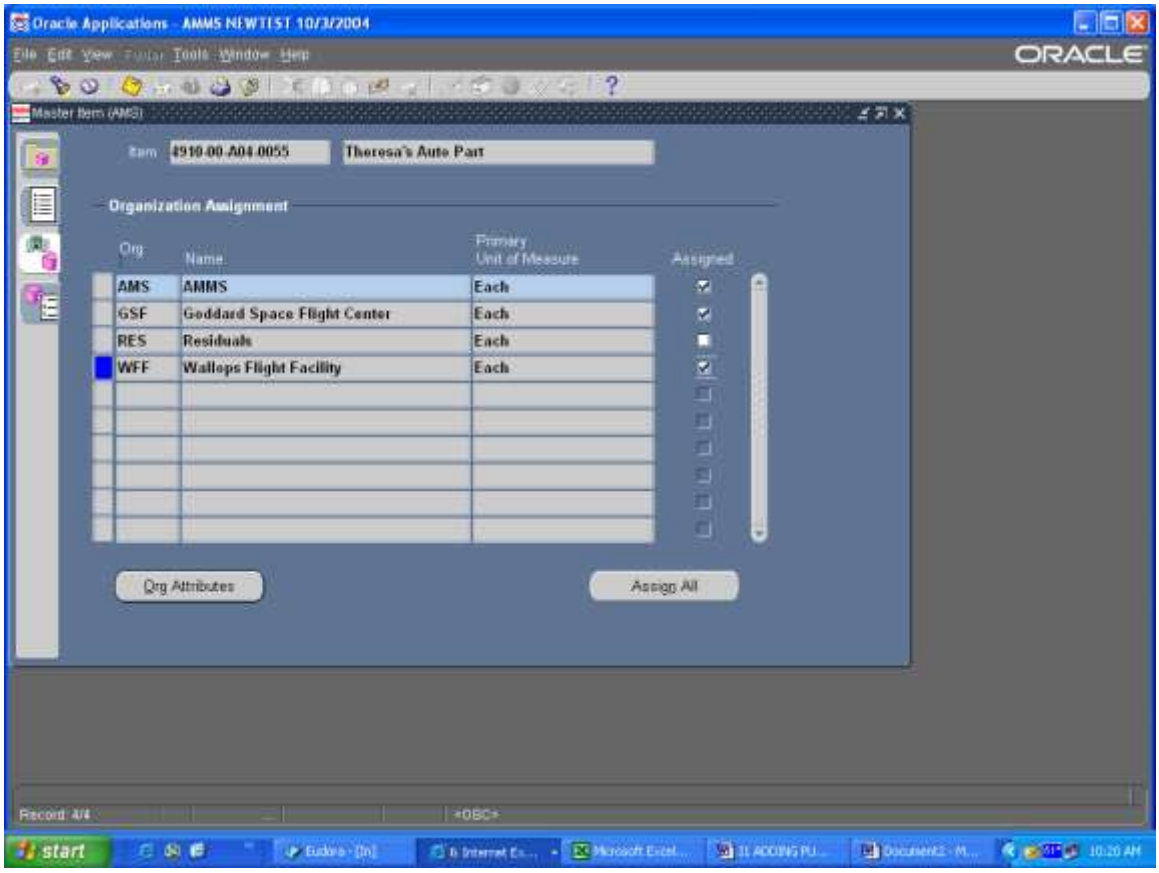
Step Description: Navigate to “Tools” and choose “Organization Assignment”

Expected Results/Actions: Organization Assignment form is opened.



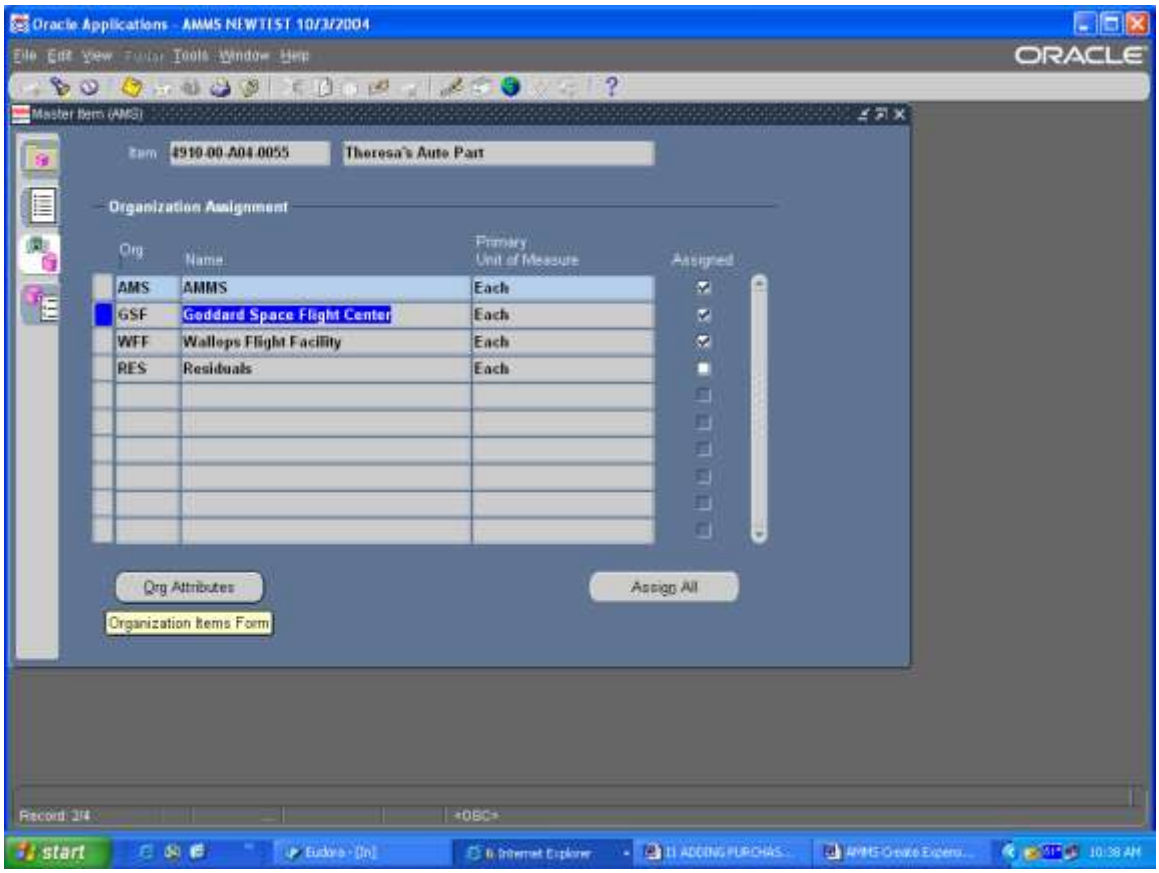
Step Description : Click on the white box next to GSF and WFF, click Save.

Expected Results/Actions: AMS, GSF and WFF have check marks next to them.



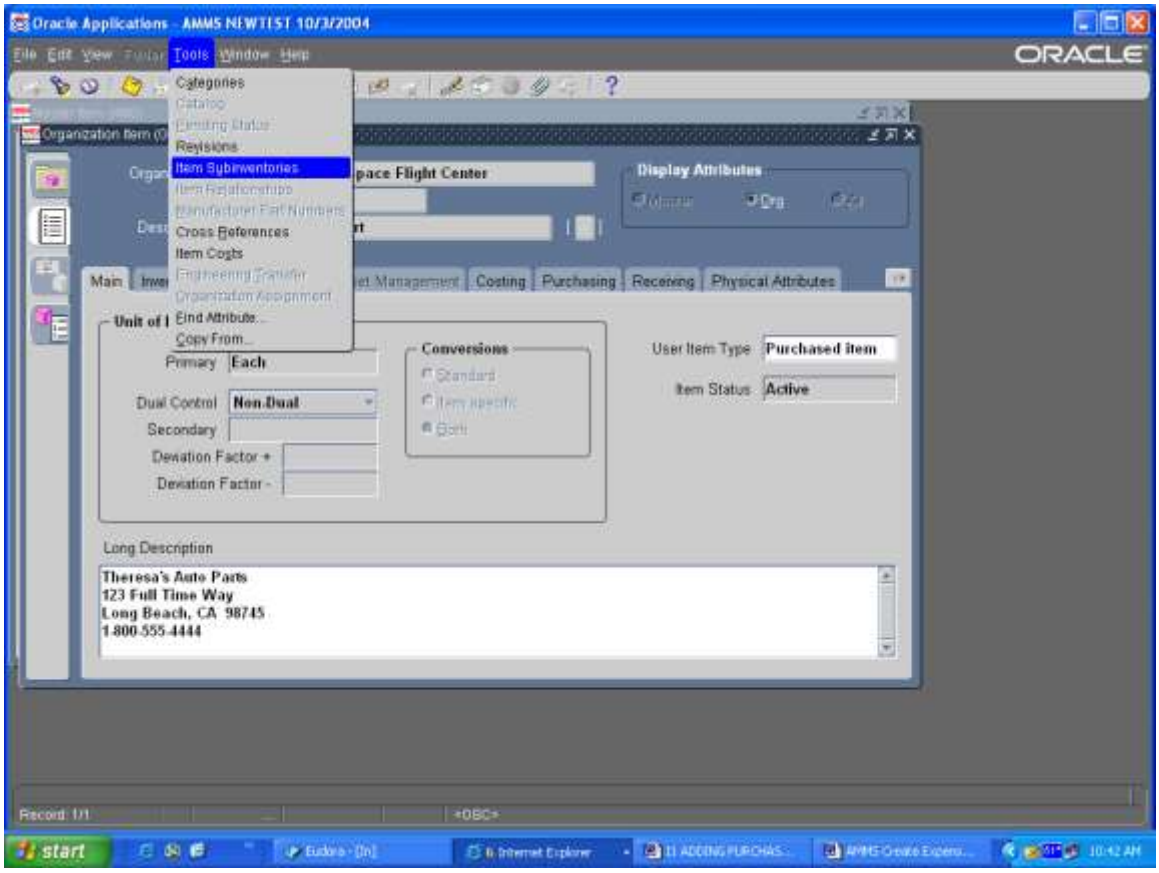
Step Description: From the Organization Assignments screen click on the GSF and then click on the Org Attributes button at the bottom of the screen

Expected Results/Actions: Organization Item window appears



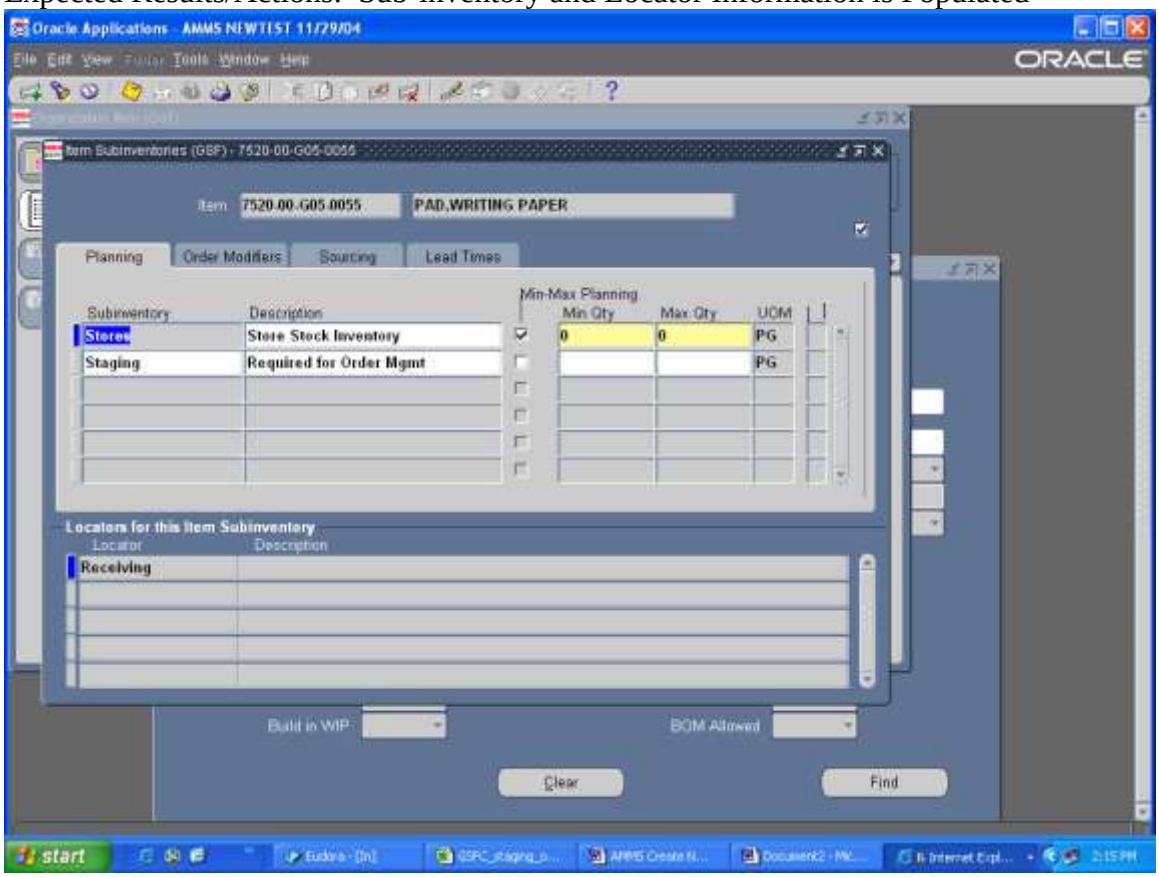
Step Description: Verify that all of the information at the Organization Level is the same as the information you entered at the Master Level. Navigate to “Tools” and choose “Item Sub inventory”

Expected Results/Actions: Item Sub inventory Form opens



Step Description: Choose the correct primary sub-inventory from the LOV then click "OK". While on the primary sub-inventory, check the box for Min Max Planning. Click on the Locator field at the bottom of the screen and enter Receiving as the Locator. All items MUST also be assigned to the Staging sub-inventory.

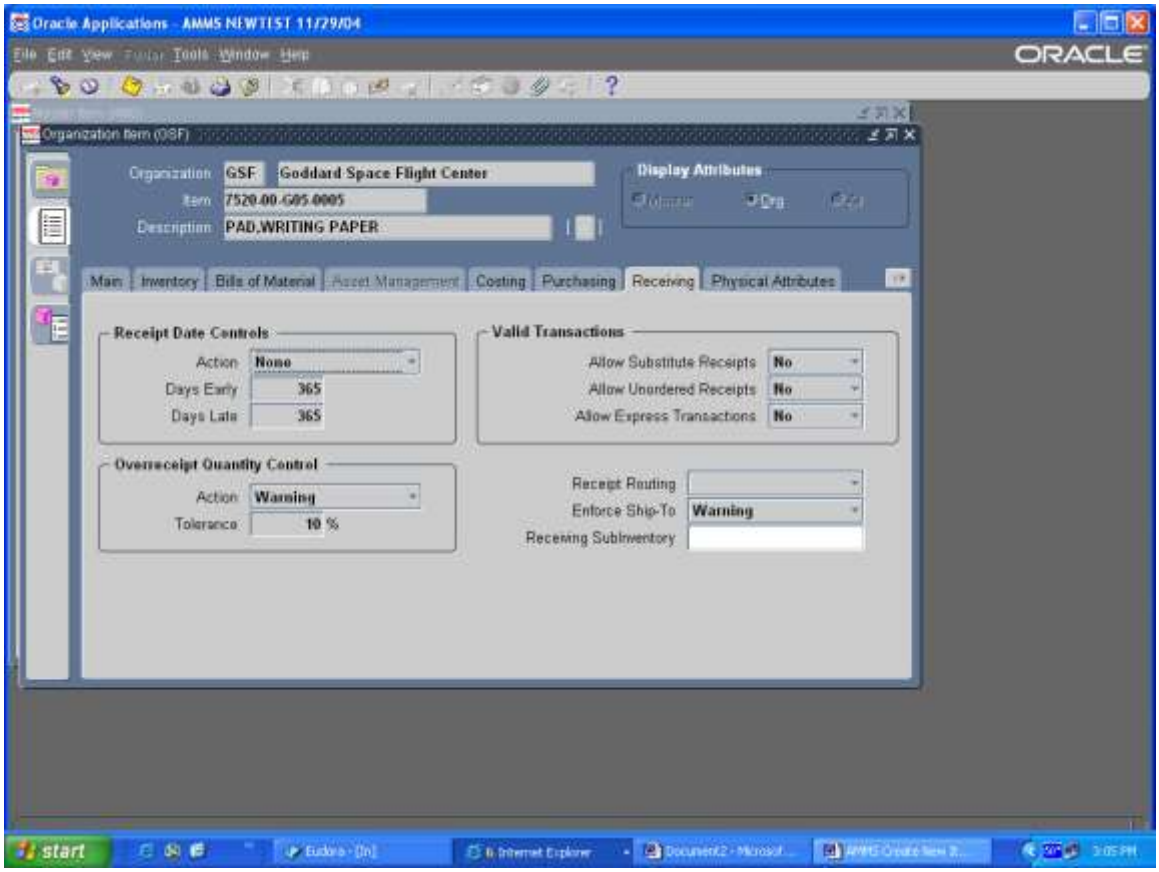
Expected Results/Actions: Sub-inventory and Locator Information is Populated



Close the Item Sub Inventory window.

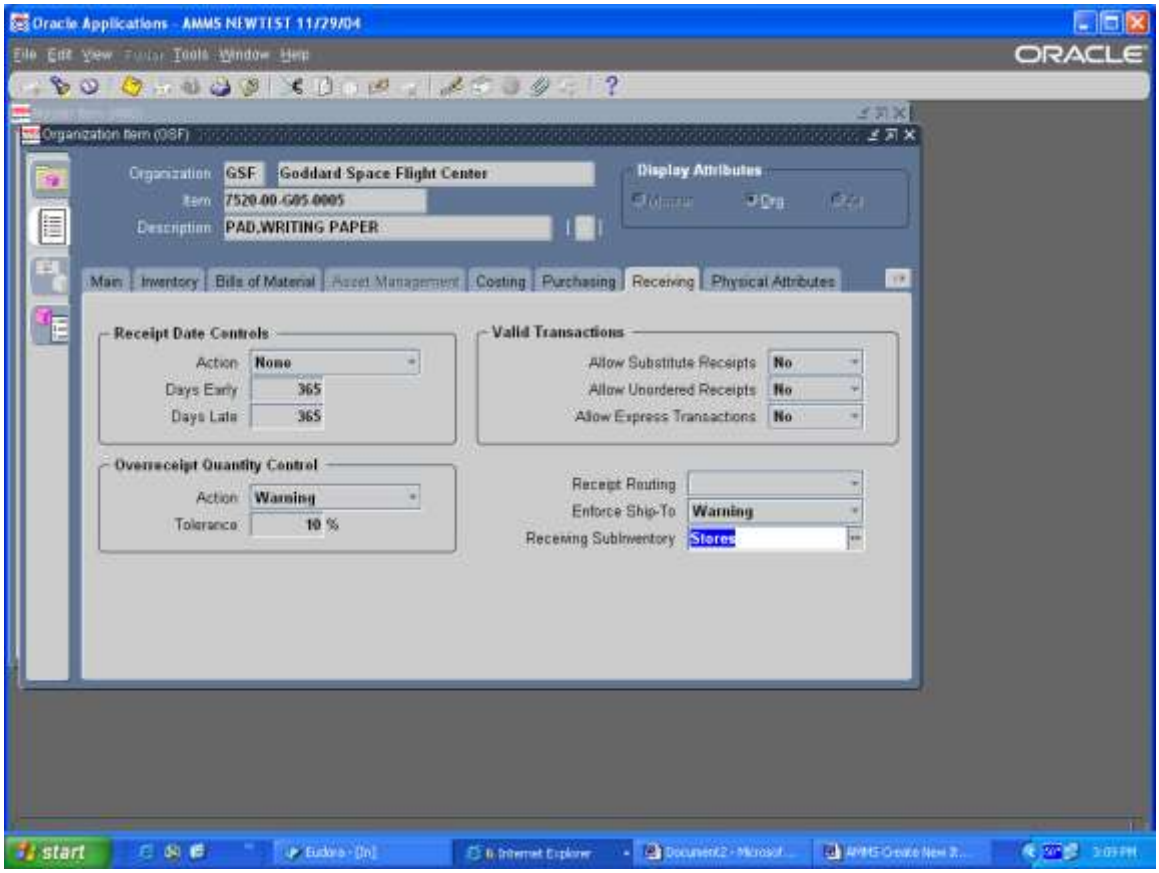
Step Description: At the Organization Items (GSF) window, select the “Receiving” Tab

Expected Results/Actions: You will be at the Receiving Tab



Step Description: In the Receiving Sub Inventory field click on the LOV and enter the same primary sub inventory as you did for the sub-inventory screen.

Expected Results/Actions: Field will be populated



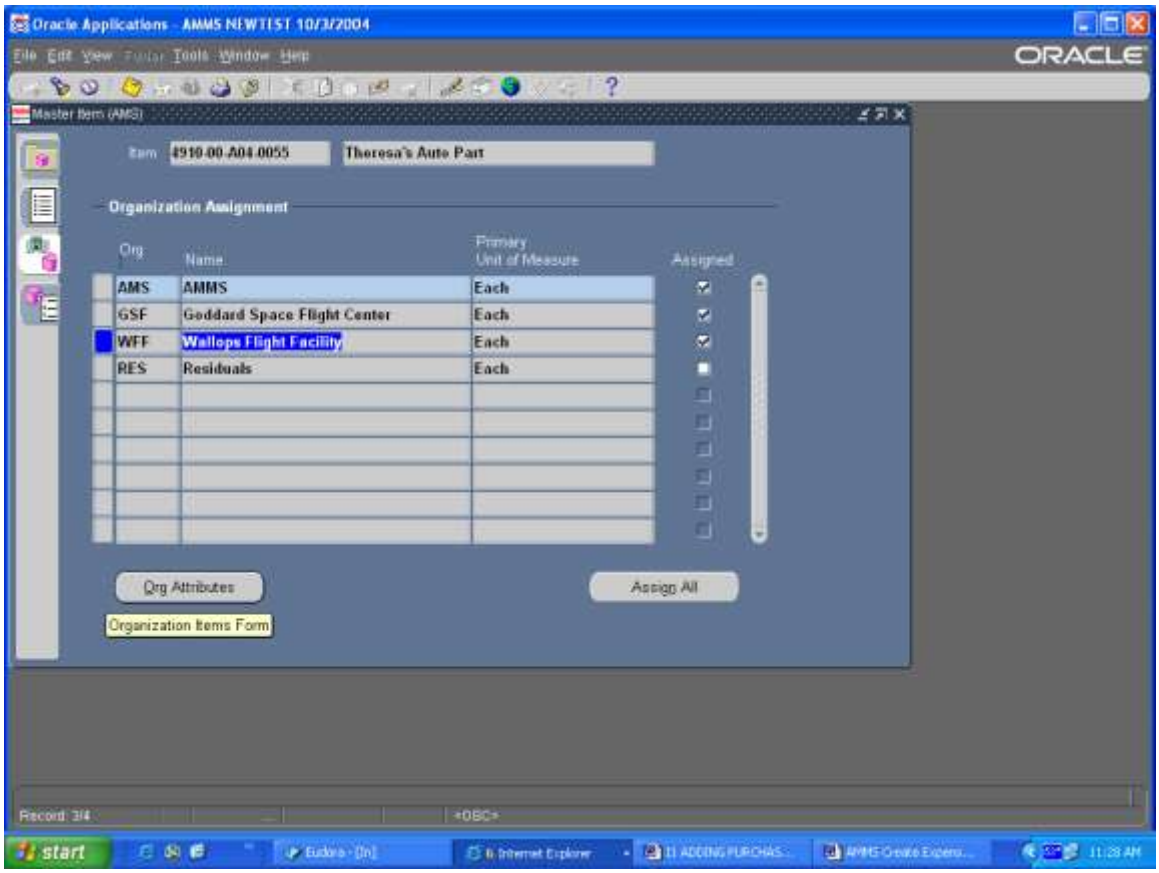
Step Description: Click on “Save” and close form

Expected Results/Actions: Transaction Complete Message.

Note: Store Stock item will need to add sub-inventories to both Organizations GSF and WFF.

Step Description: Close the GSF Organization Item screen and select the WFF Wallops Organization assignment click on the Organization Attributes button at the bottom of the screen

Expected Results: The Wallops Organization Item window will appear.



Step Description: Verify all data is the same as the Master Item Record and add the appropriate sub inventories following the same steps for the GSF Organization.

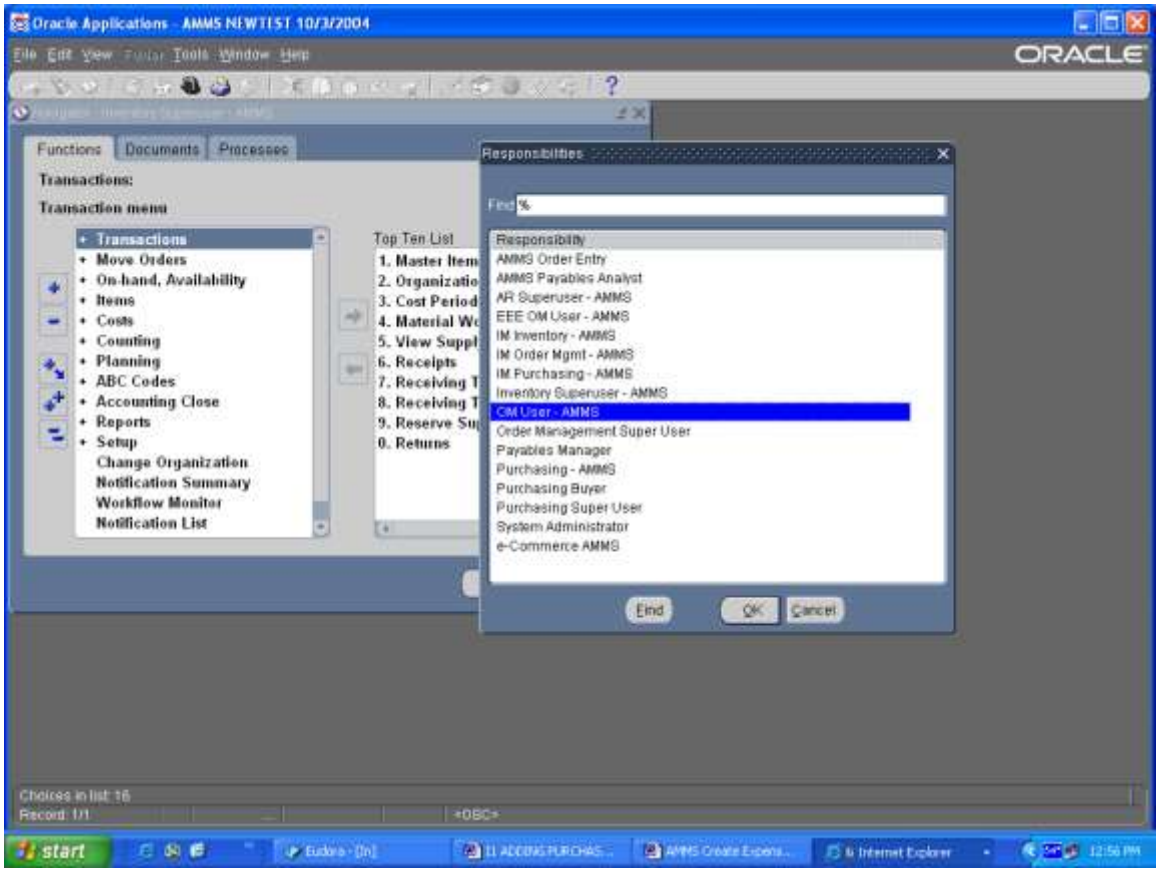
Expected Results/Actions: Sub inventories will be assigned.

Step Description: Save your work and close all forms.

Expected Results/Actions: Will be back at the IM Inventory AMMS Menu

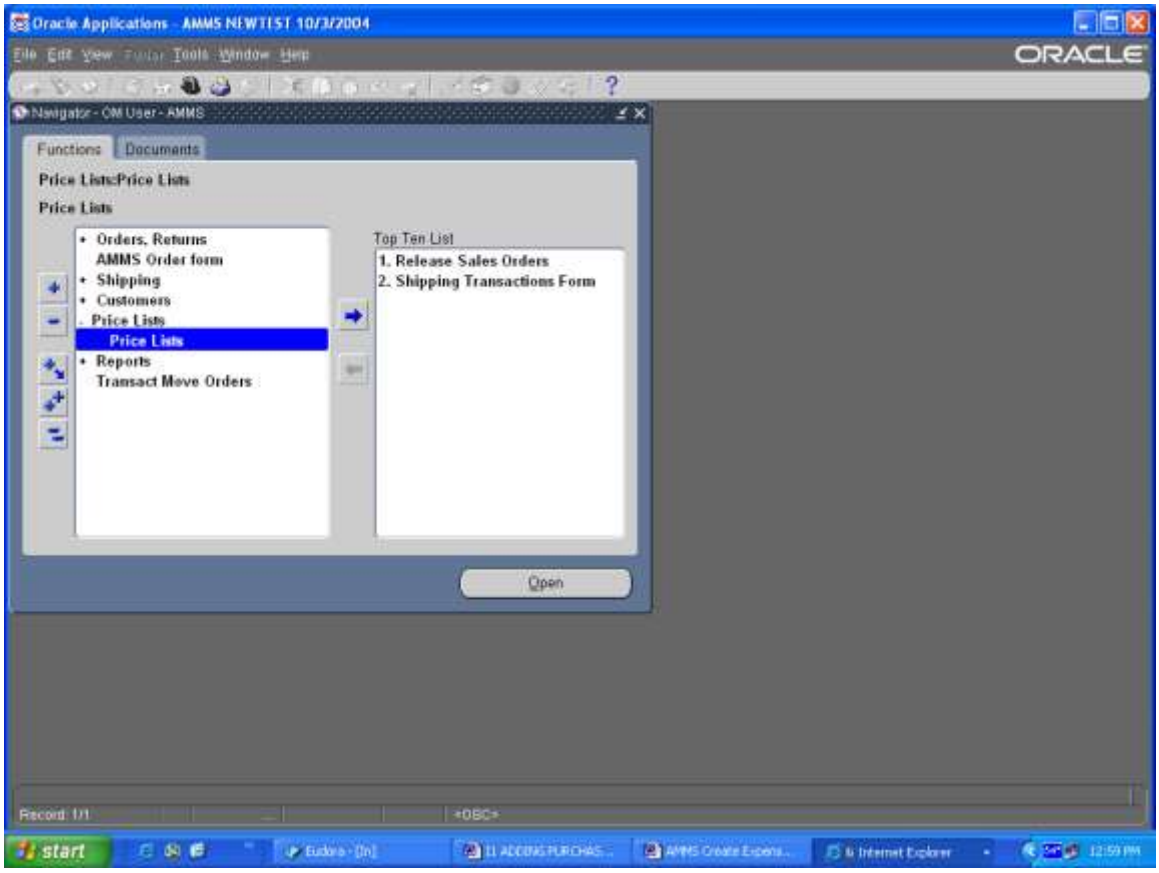
Step Description: Change responsibilities to the OM USER Responsibility

Expected Results/Actions: The OM USER main menu will appear



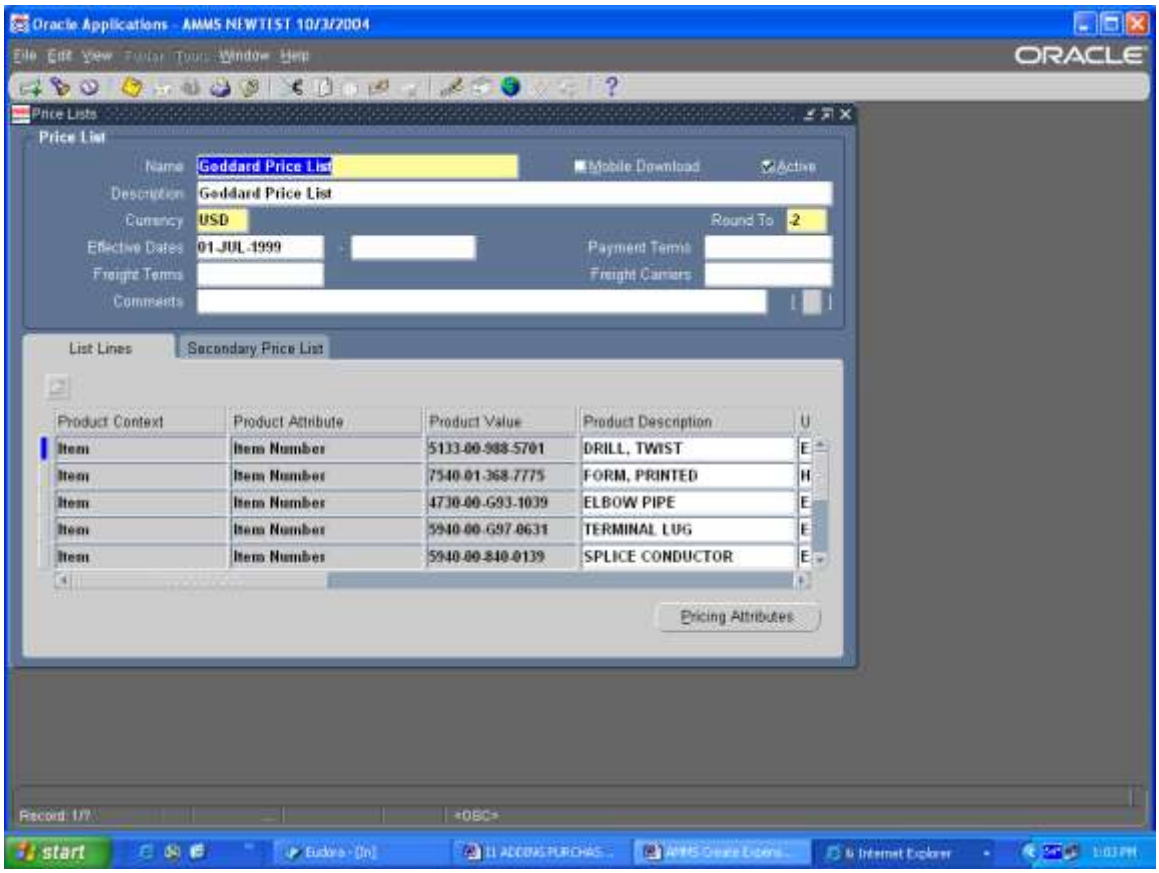
Step Description: Select Price Lists> Price List from the menu and click on open

Expected Results/Actions: A blank Price List screen will appear



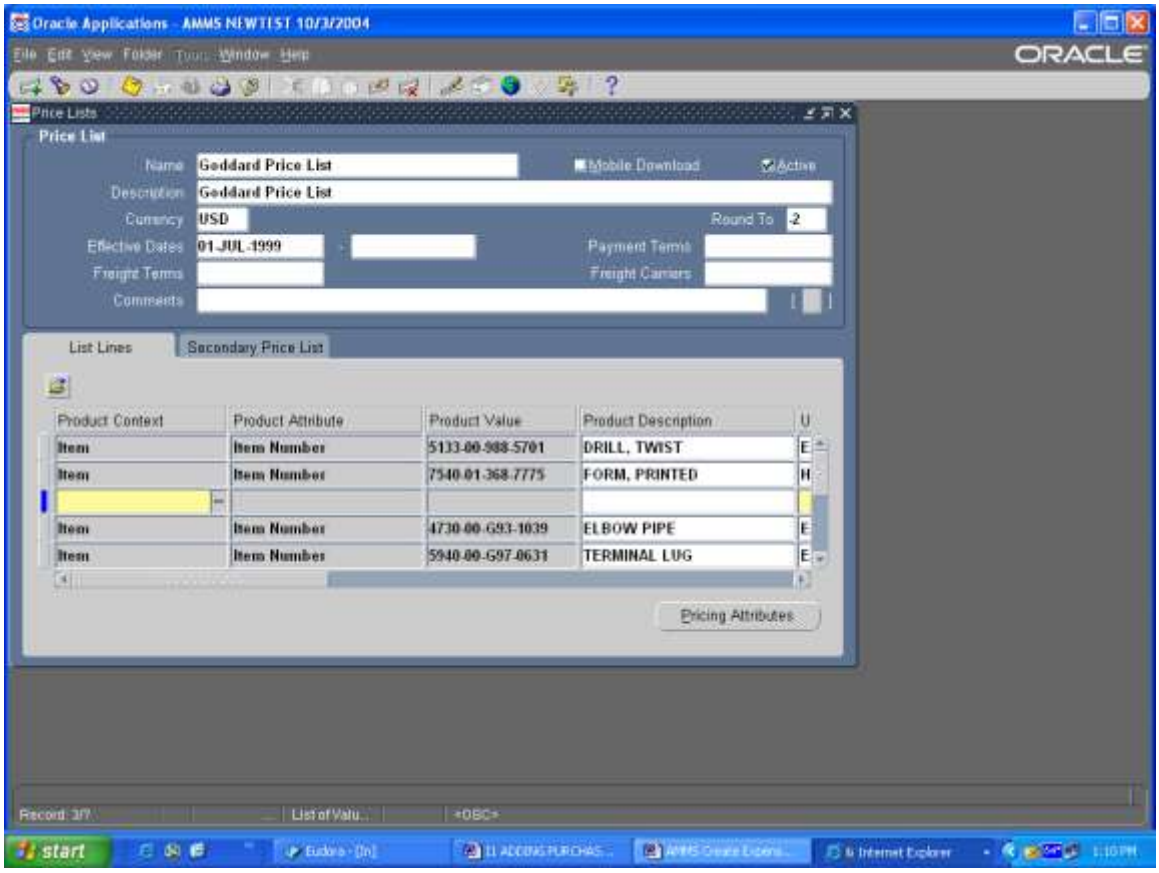
Step Description: On your keyboard hit the F11 button to send Oracle into query mode, then hold down the Ctrl button and hit F11 again to end the query.

Expected Results/Actions: The Goddard Price List will appear



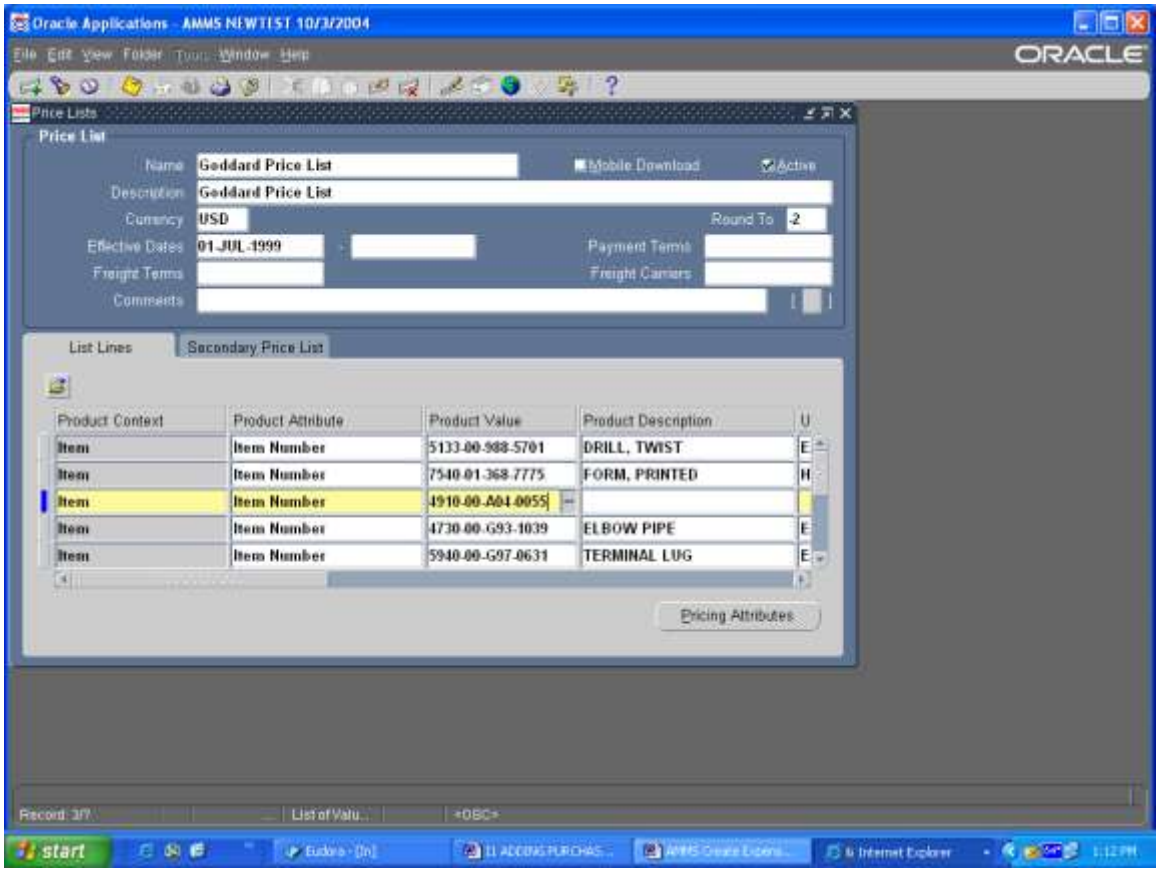
Step Description: At the bottom of the Goddard Price List window, in the List Line section, click on an occupied line then click on the green plus sign (+) on the tool bar to add a new line, make sure you are at the bottom of the screen.

Expected Results/Actions: A blank line will appear and the Item field will be yellow



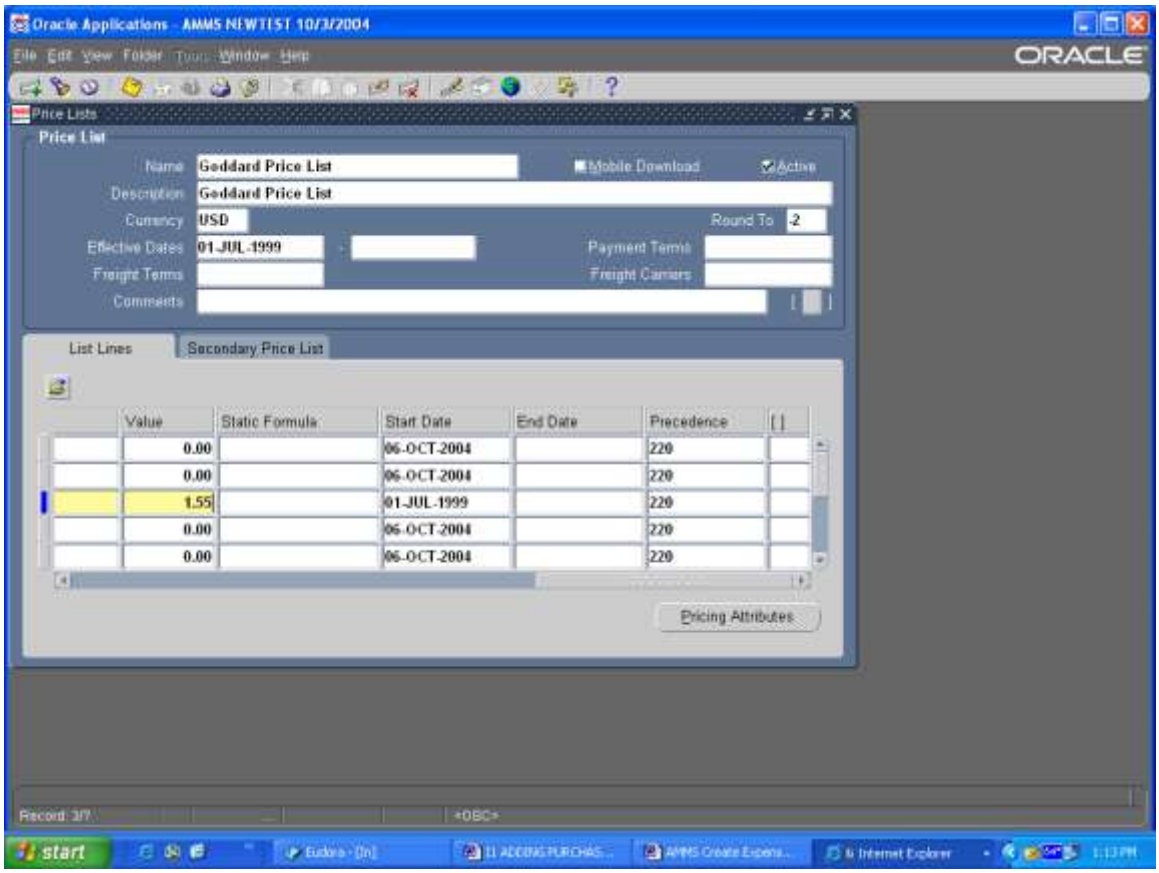
Step Description: In the Item field click on the LOV and select Item from the list, tab to the Product Attribute field and click on the LOV and select Item Number from the list. In the Product Value field enter the Item number you just loaded.

Expected Results/ Actions: All fields will be populated



Step Description: Tab over to the value field and enter the cost for the item. Example: 1.55

Expected Results/ Actions: Field will be populated with cost.



Step Description: Save your work and close all forms, Repeat the same process for the Wallops Price List.

Expected Results/Actions: Transactions Complete and Applies message at the bottom of screen, and will return to OM USER main menu.

This stock number is now loaded and on the Price List.

AMMS TRAINING SCRIPT

Approve Cycle Counts

Purpose

The purpose of this training script is to give instructions on how to approve items that have been cycle counted and required an adjustment

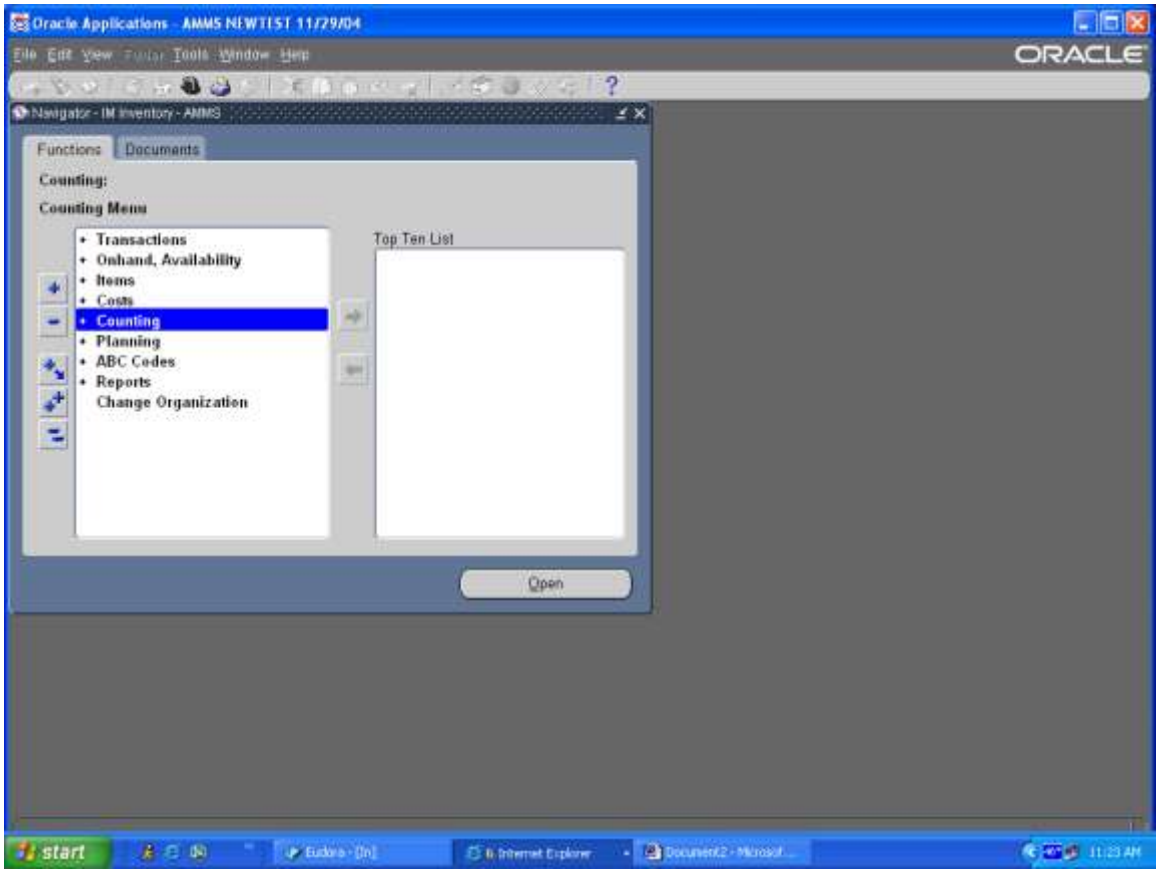
Audience

Material Coordinators and Supply Technician Leads

Prepared By	Theresa Coulson
Creation Date:	12/13/2004
Document Name	Approve Cycle Counts.doc
Version	2
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Inventory.	

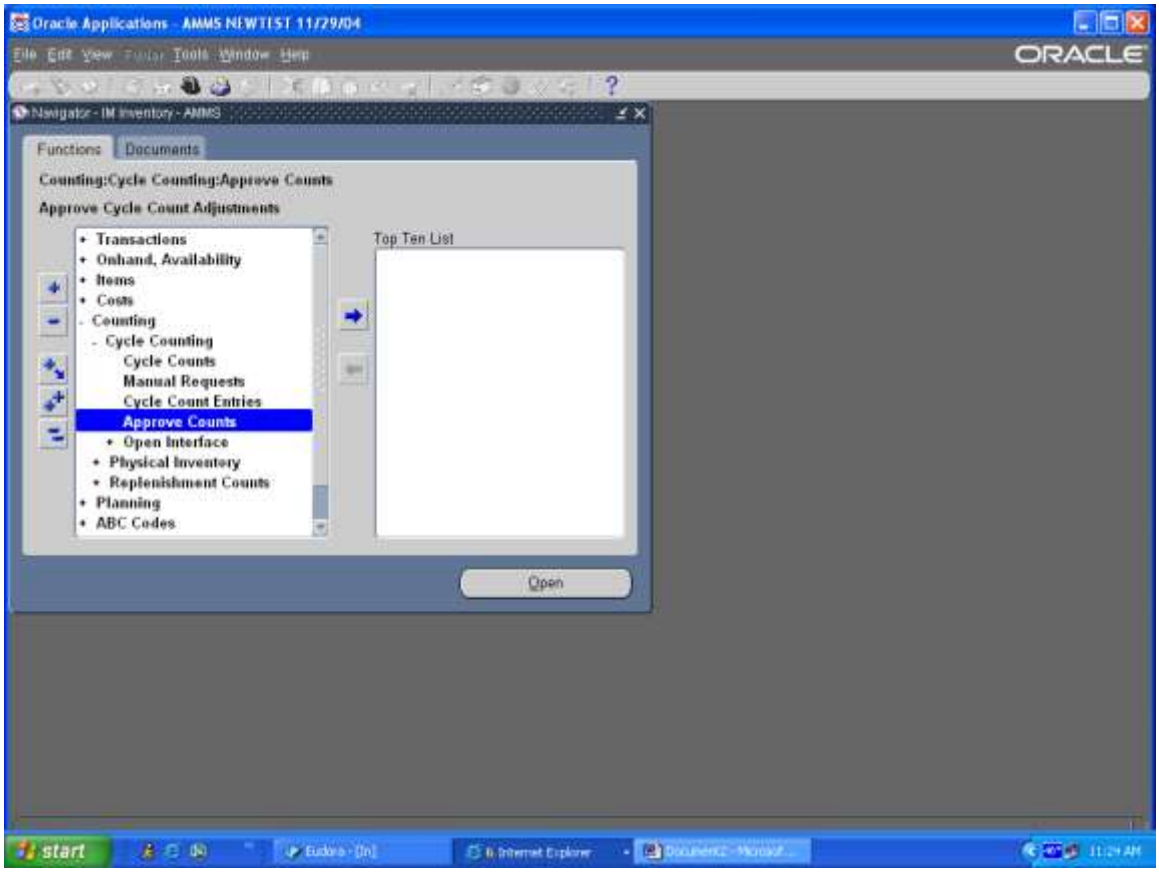
Step Description: Sign onto Oracle and select the IM Inventory AMMS responsibility:

Expected Results: You will be at the IM Inventory Main Menu:



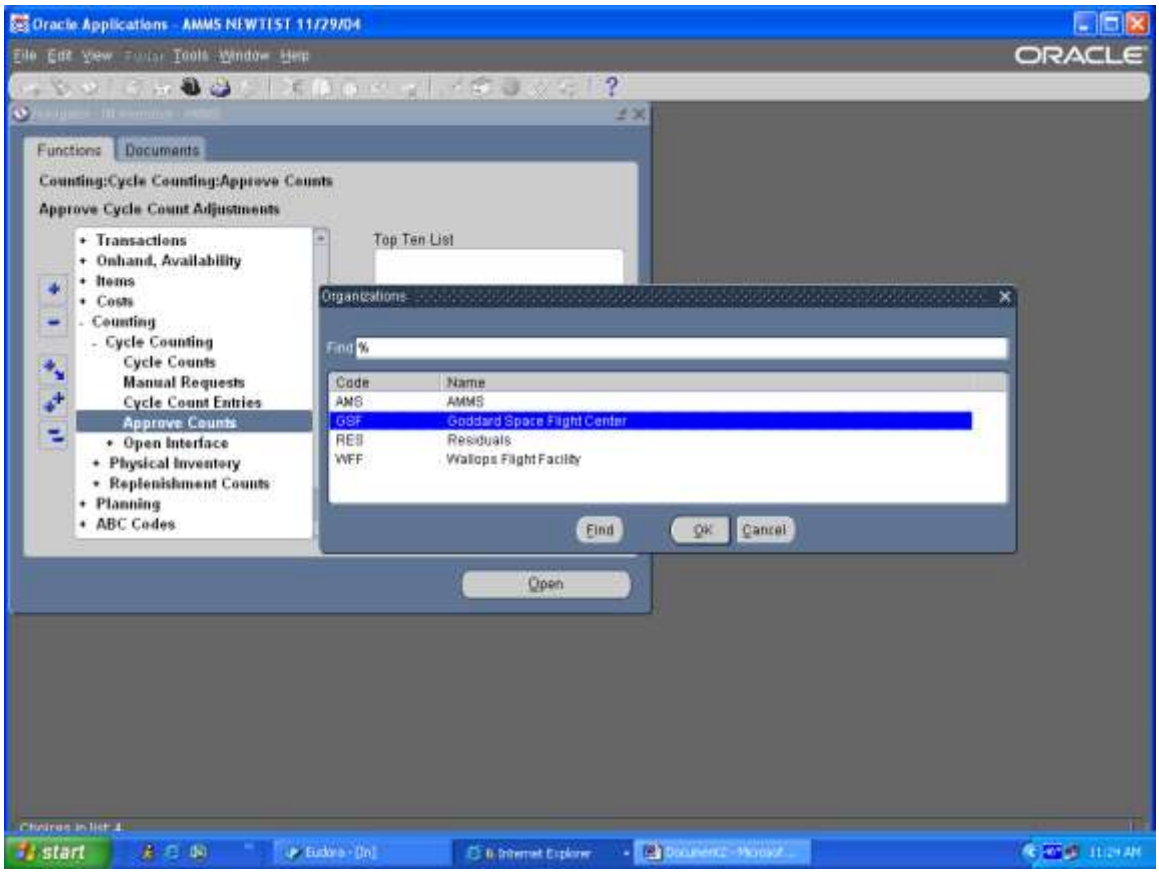
Step Description: From the IM Inventory AMMS main menu select Counting > Cycle Counting > Approve Counts

Expected Results: The Organizations window will appear



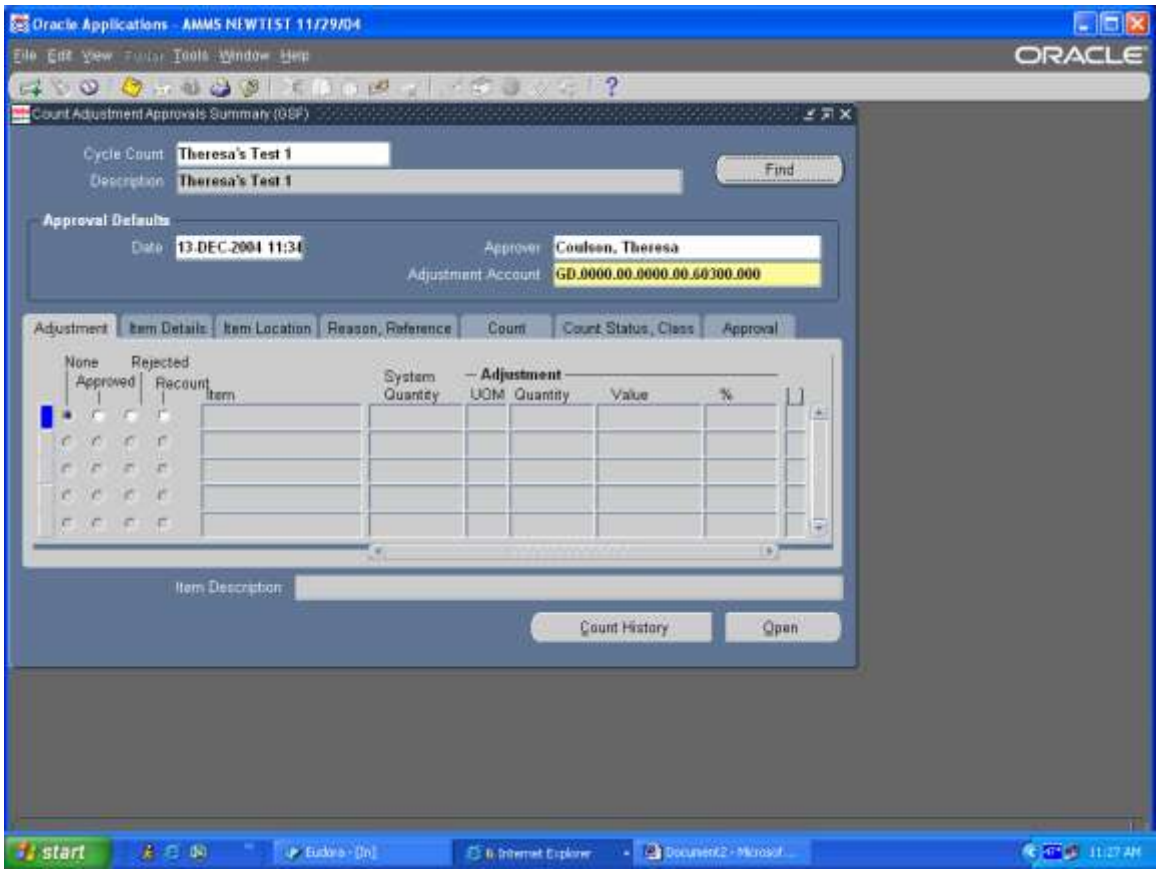
Step Description: Choose the appropriate organization GSF for Goddard or WFF for Wallops click OK

Expected Results: The Count Adjustments Approvals Summary window will open



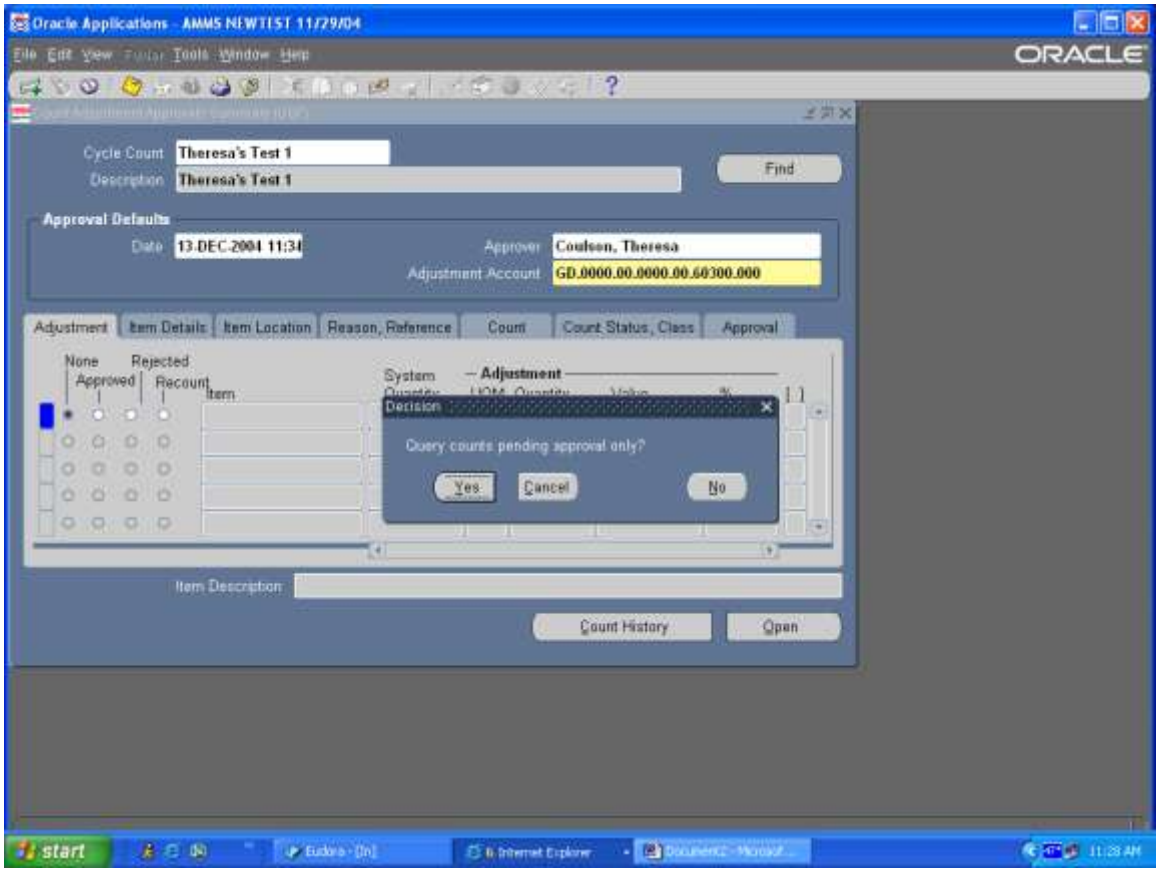
Step Description: In the Cycle Count field click on the LOV and select the name of the cycle count you are conducting. Click on the Find button.

Expected Results: Field will be populated with cycle count name and a Decision window will appear



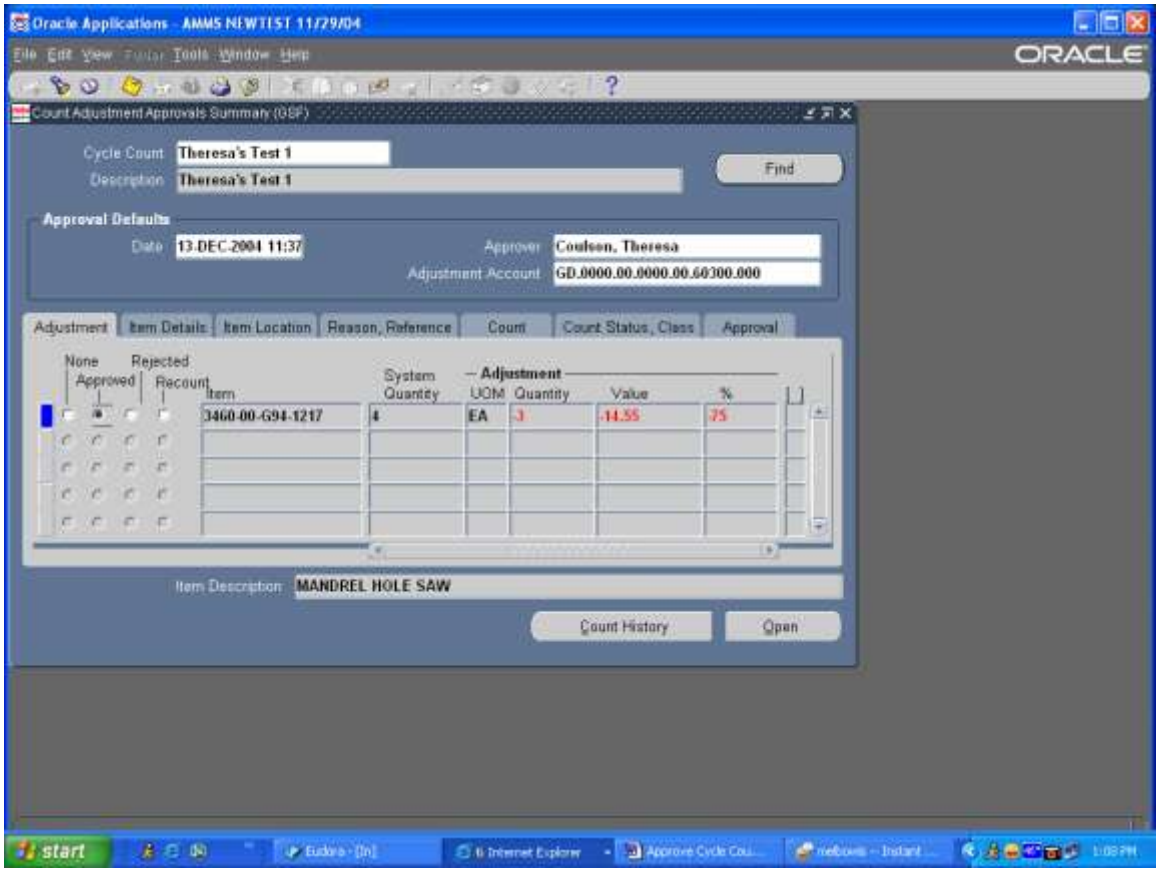
Step Description: At the Decision window answer the questions “Query counts pending approval only?” click on Yes.

Expected Results: Information will be populated at the bottom of the screen



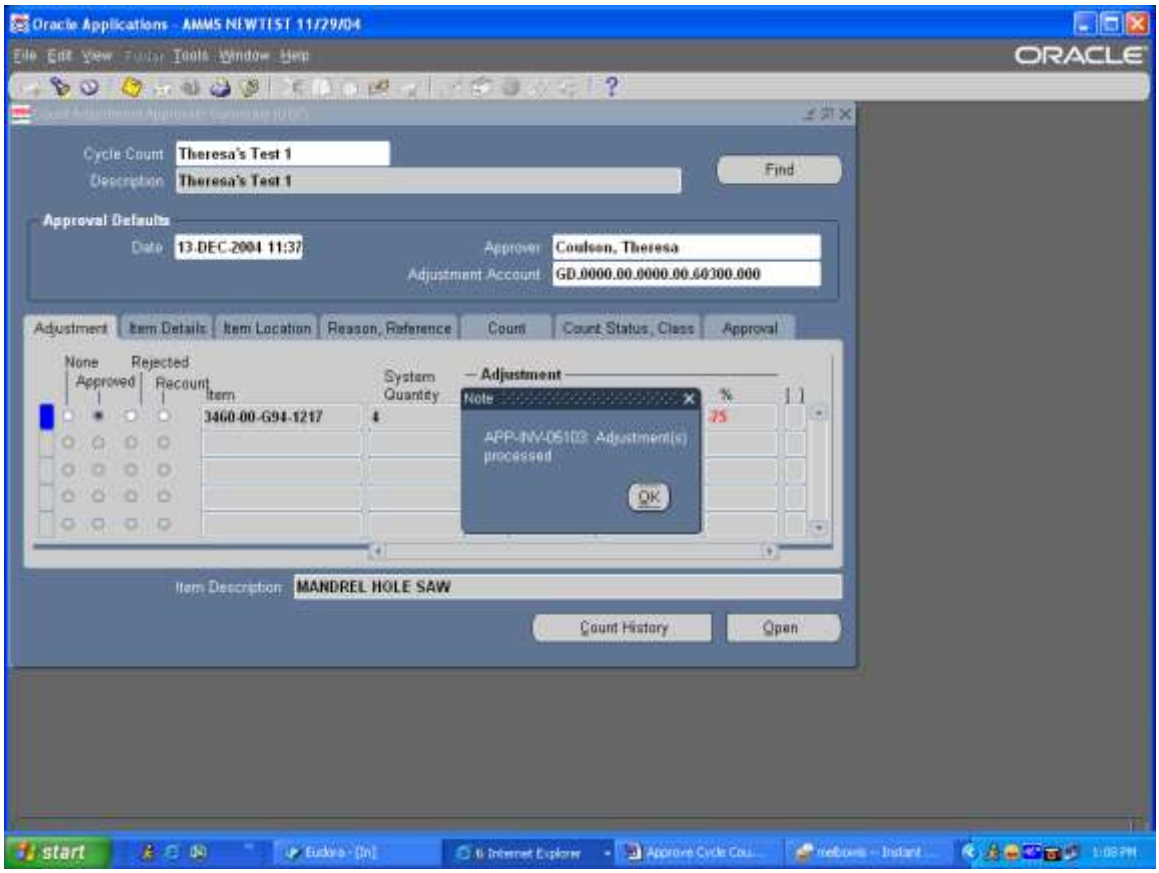
Step Description: Once you have completed your research and are ready to adjust the balance, click on the “approve” button and then save your work.

Expected Results: The “approve” button will be selected



Step Description: Save your work.

Expected Results: Note window will appear



Step Description: Click on Ok to the APP-INV note telling you the Adjustments have been processed.

Expected Results: Transaction Complete message at bottom of screen

Notes: This step must be done before the final inventory reports are ran, balances will not adjust until the counts entered are approved.

AMMS TRAINING SCRIPT

ADDING EXPENSE ITEM TO ORACLE

Purpose

The purpose of this training script is to demonstrate how a Material Coordinators and Supply Technician Lead will add a new Expense stock number to the Oracle data base. After the item has been added to the system you also have to add it to BOTH Mater Price Lists (GSF and WFF).

Audience

Material Coordinators and Supply Technician Leads

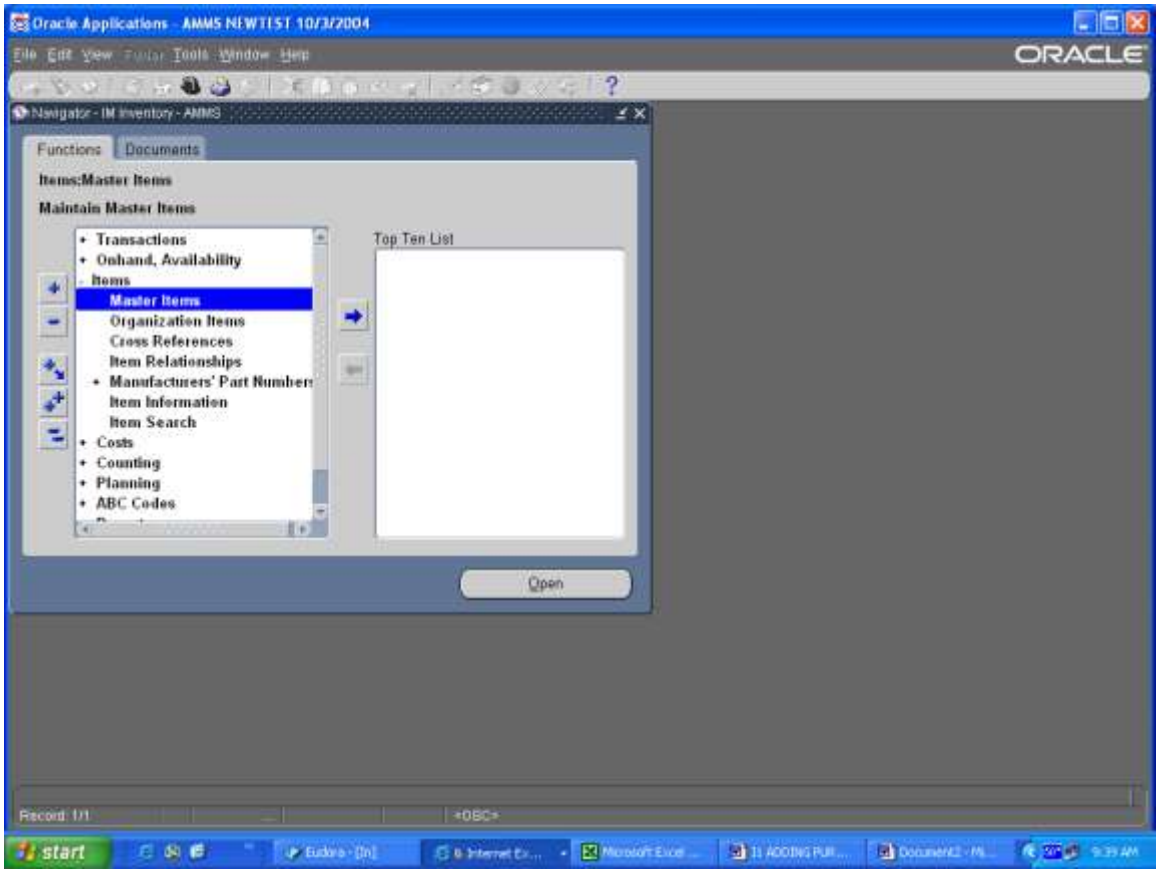
Prepared By	Theresa Coulson
Creation Date:	11/05/2004
Document Name	Create Expense Item Number.doc
Version	x
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Inventory.	

Step Description: Sign on to Oracle Applications and Select User Responsibility “IM Inventory AMMS”

Expected Results/Actions: Oracle Displays the Inventory main Menu

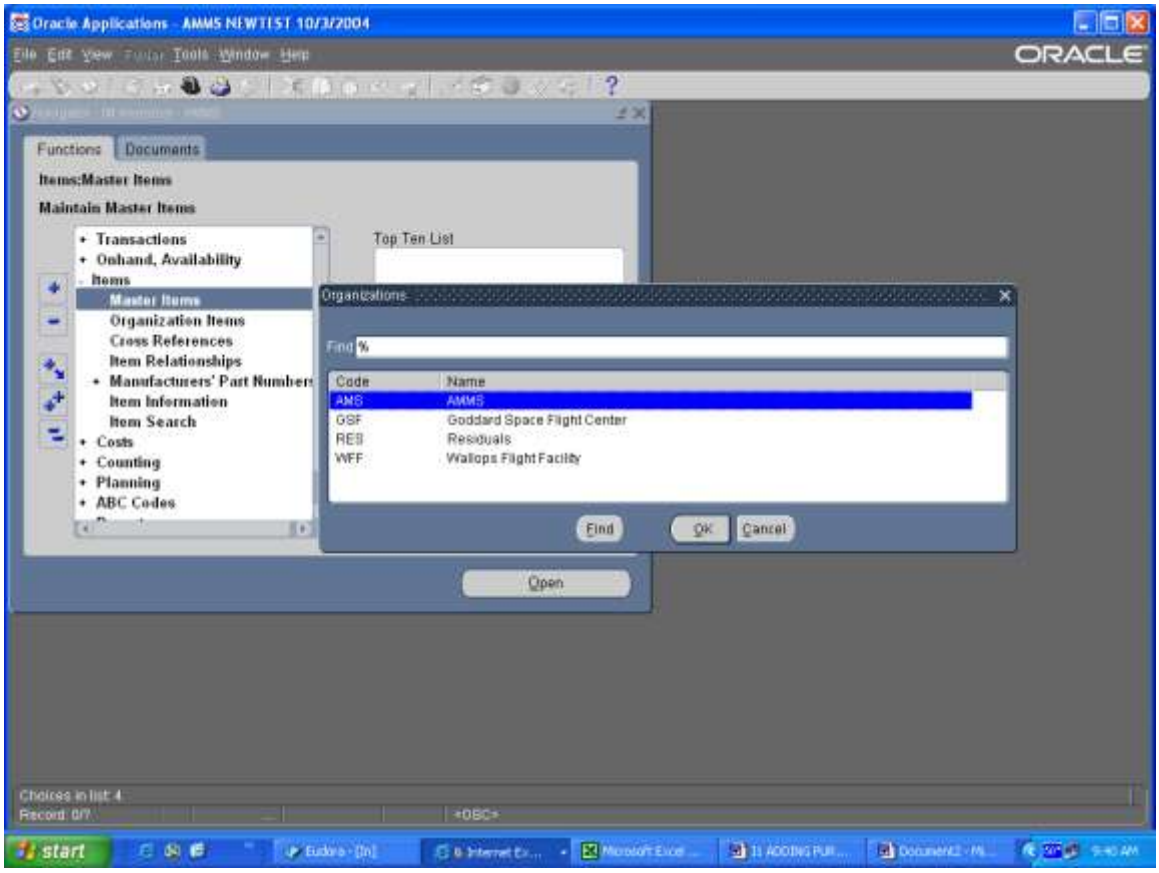
Step Description: Select “Items” then “Master Items”

Expected Results/Actions: Organization form opens.



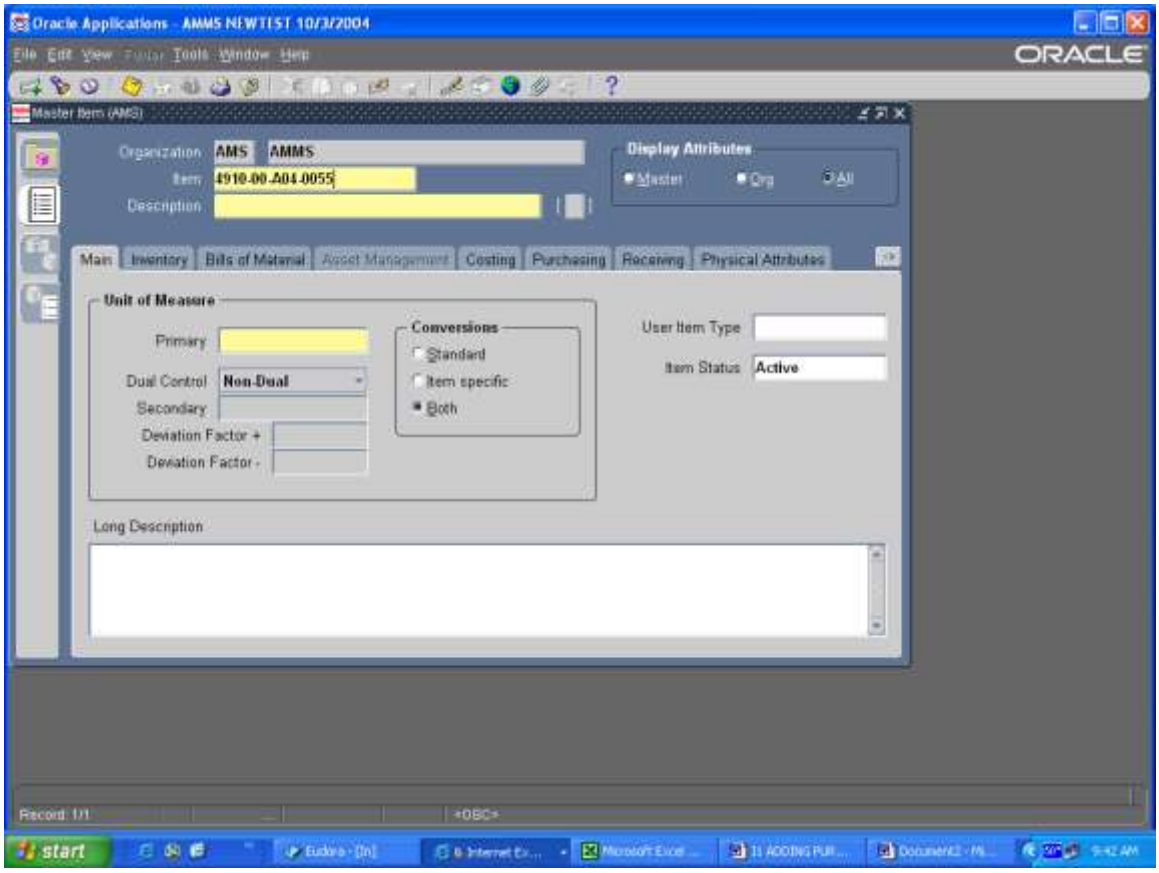
Step Description: Select “AMS” as the Organization and Click OK

Expected Results/Actions: Blank Master form opens.



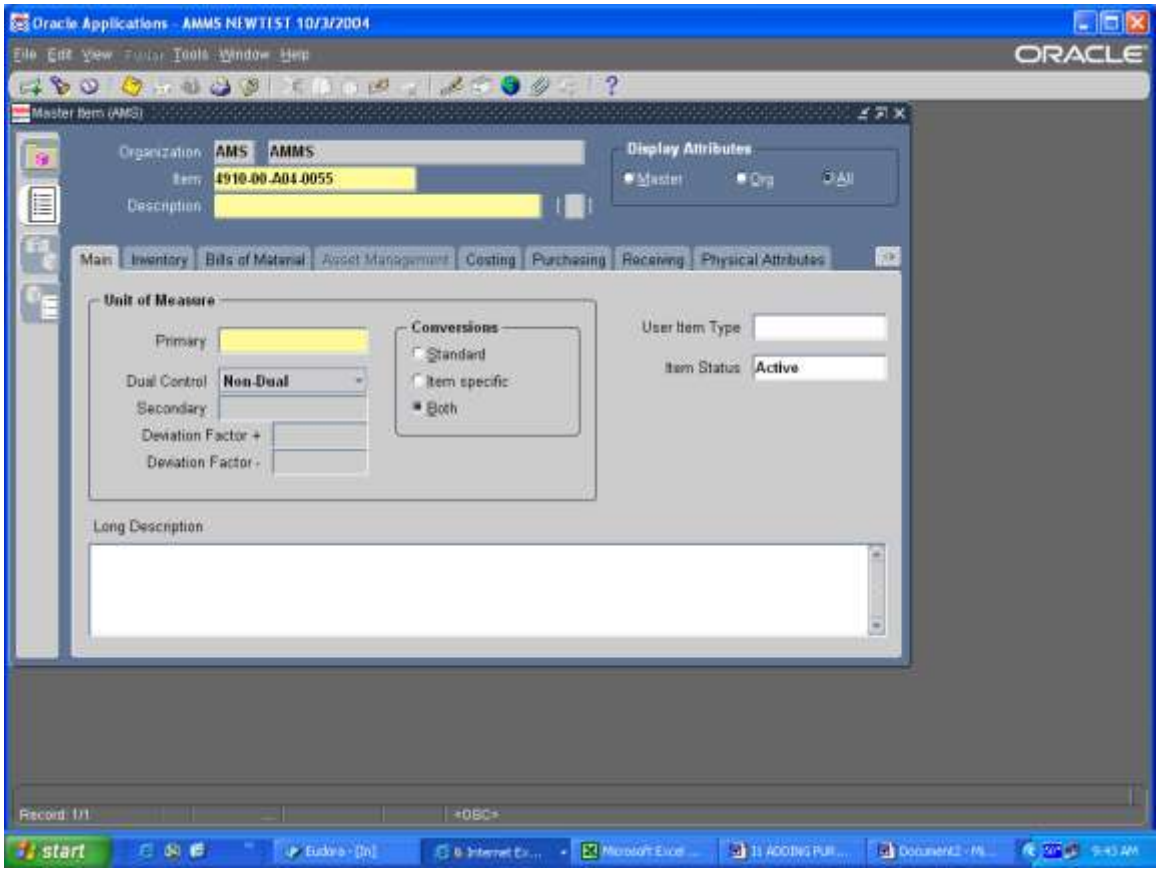
Step Description: Enter the New Item Number

Expected Results/Actions: Field is populated.



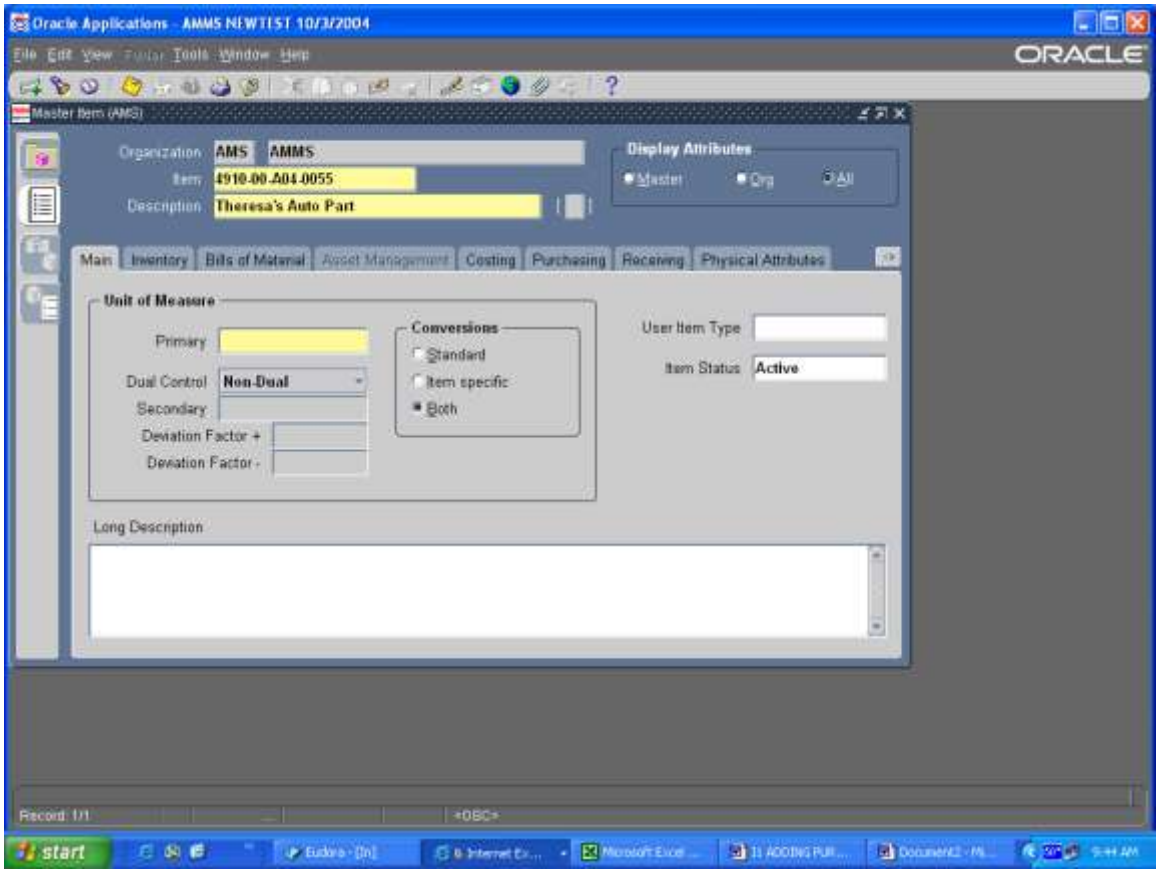
Step Description: Click on the Description Field

Expected Results/Actions: Cursor moves.



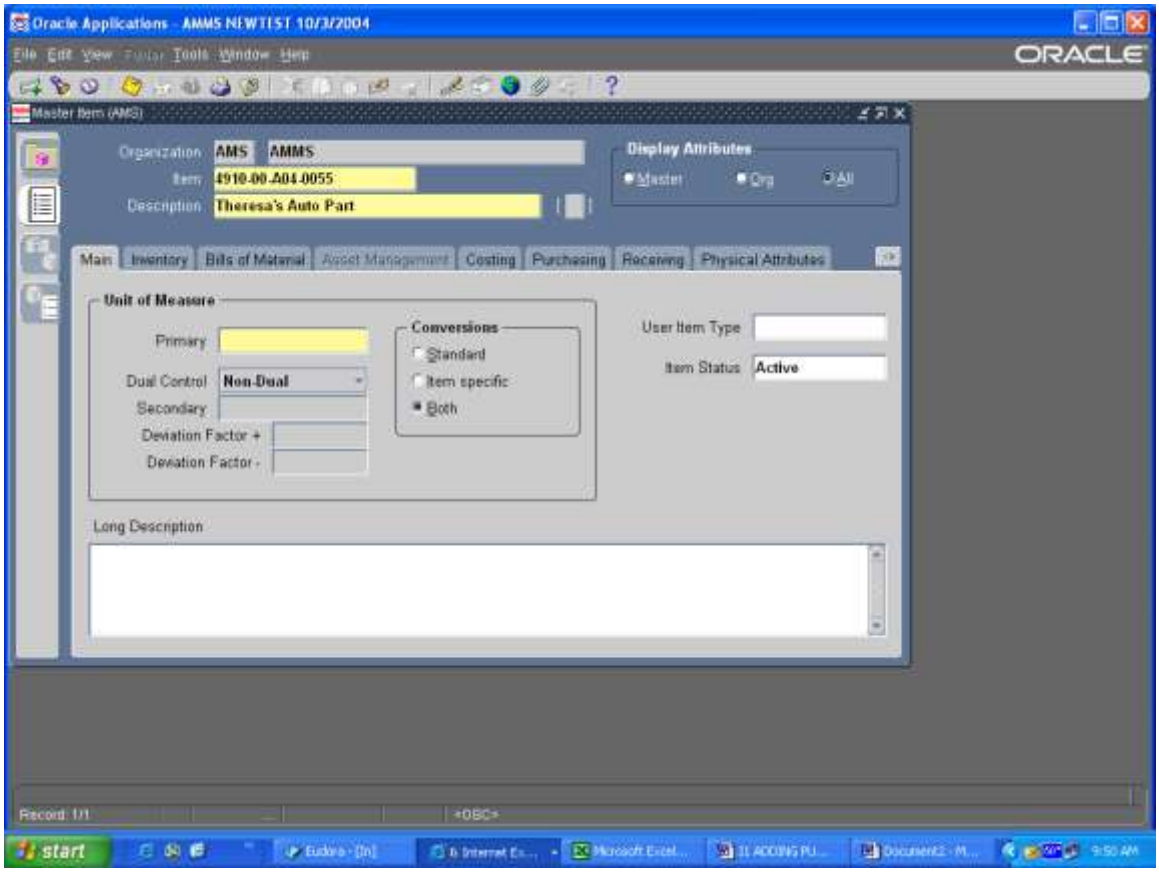
Step Description: Enter an Abbreviated Description (noun) for Expense items the Noun could possibly be the Vendor Name

Expected Results/Actions: Field is populated.



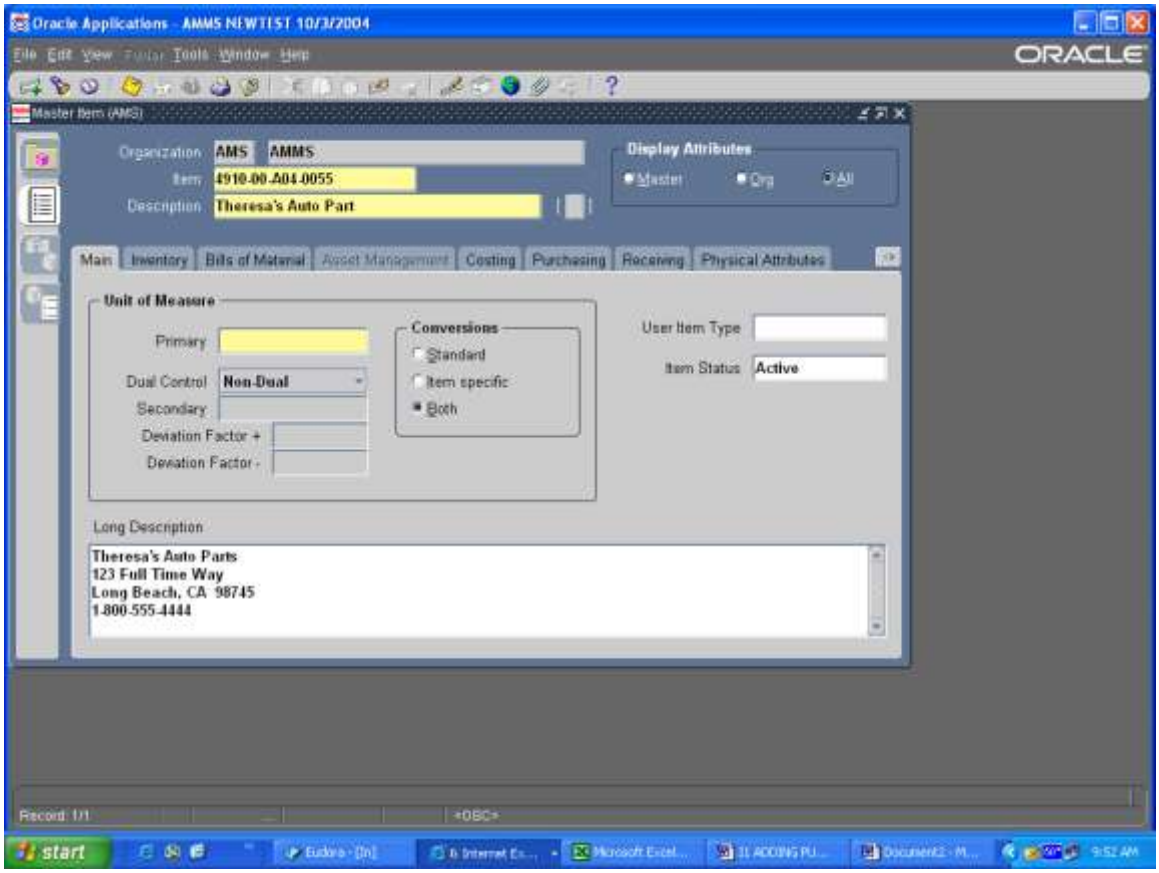
Step Description: Click on the Long Description field at the bottom of the screen

Expected Results/Actions: Cursor moves



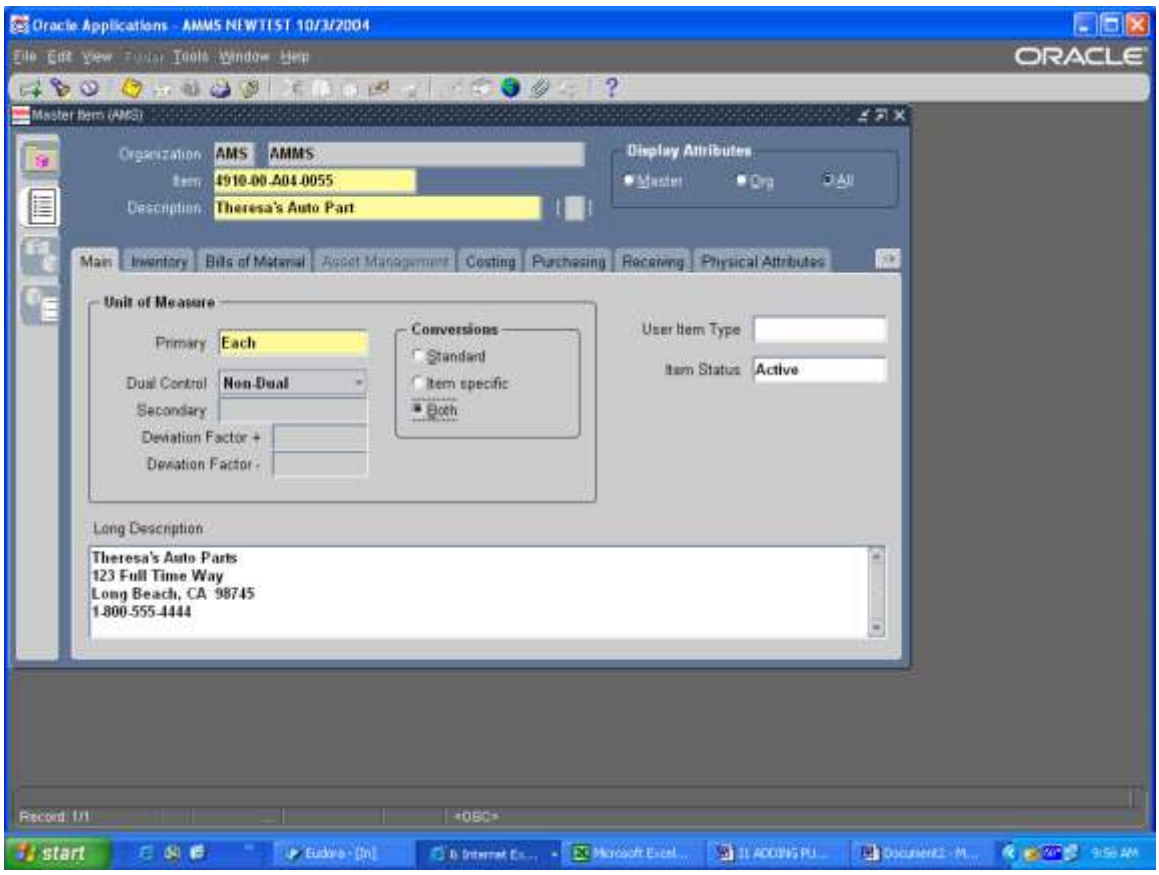
Step Description: Enter the Entire Item Description then, if the Noun is the Vendor name enter the Vendor information in the Description field

Expected Results/Actions: Field is populated.



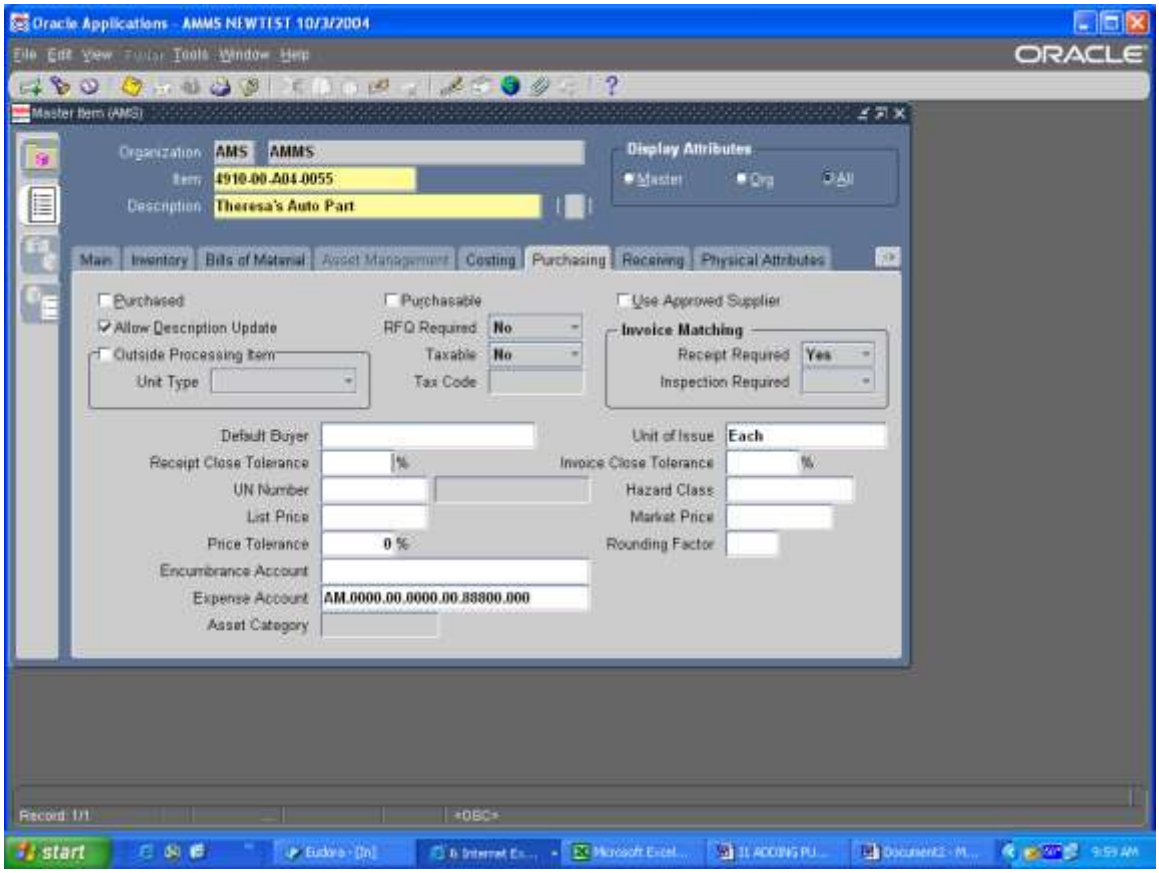
Step Description: Click on the Primary Unit of Measure field and change if necessary from List of Values (LOV) then Click OK **Please remember to select the correct Primary UOM as to this field can never be changed.**

Expected Results/Actions: U/I is updated



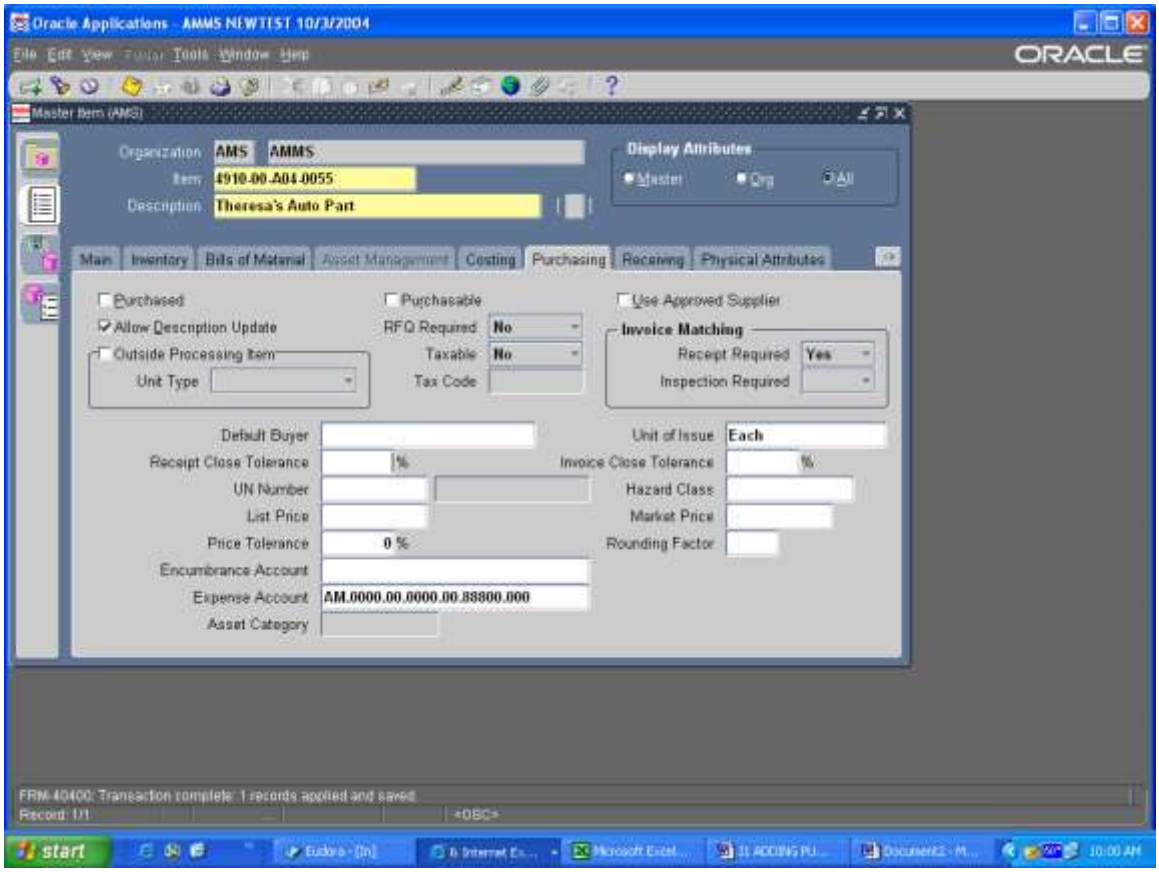
Step Description: Navigate to the Purchasing Tab and select the Unit of Issue from the LOV; this should match the Primary UOM.

Expected Results/Actions: Purchasing Unit of Measure is changed



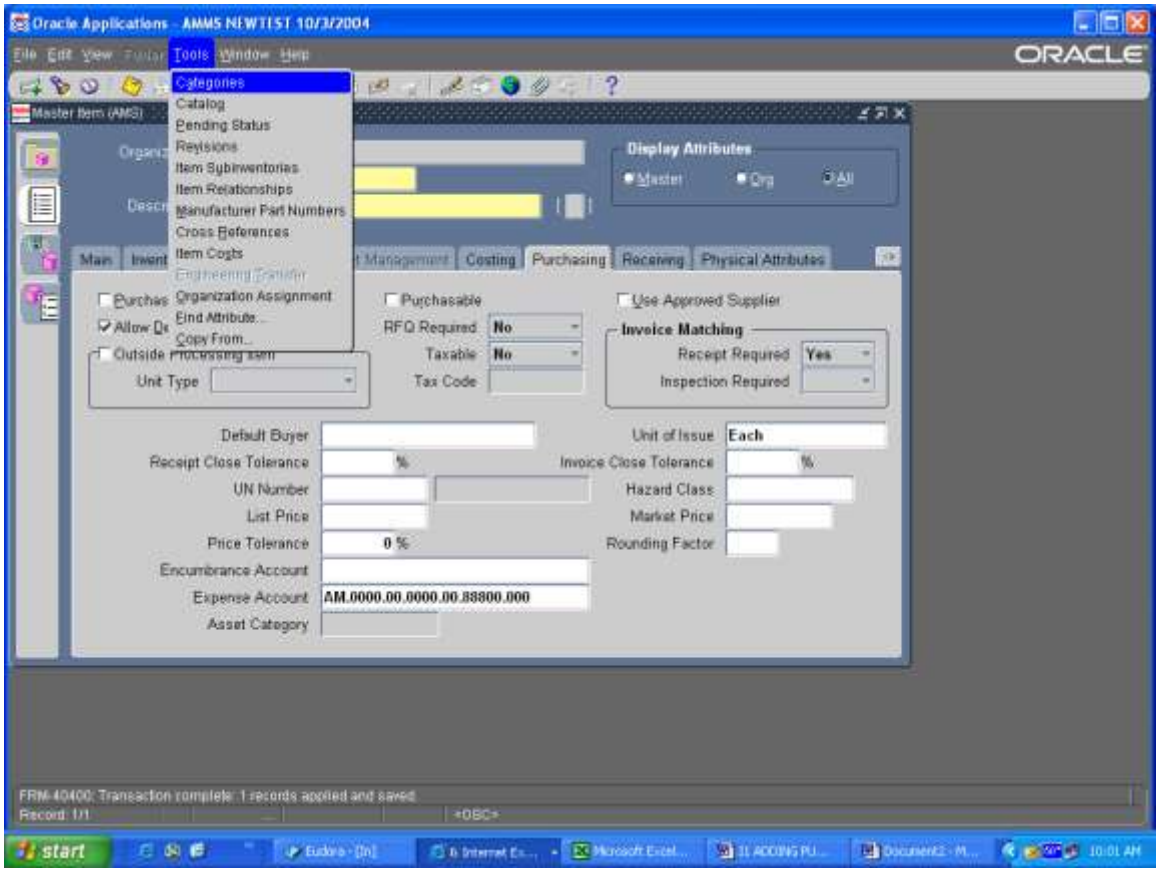
Step Description: Save Information Entered

Expected Results/Actions: Transaction Complete Message at the bottom of the form.



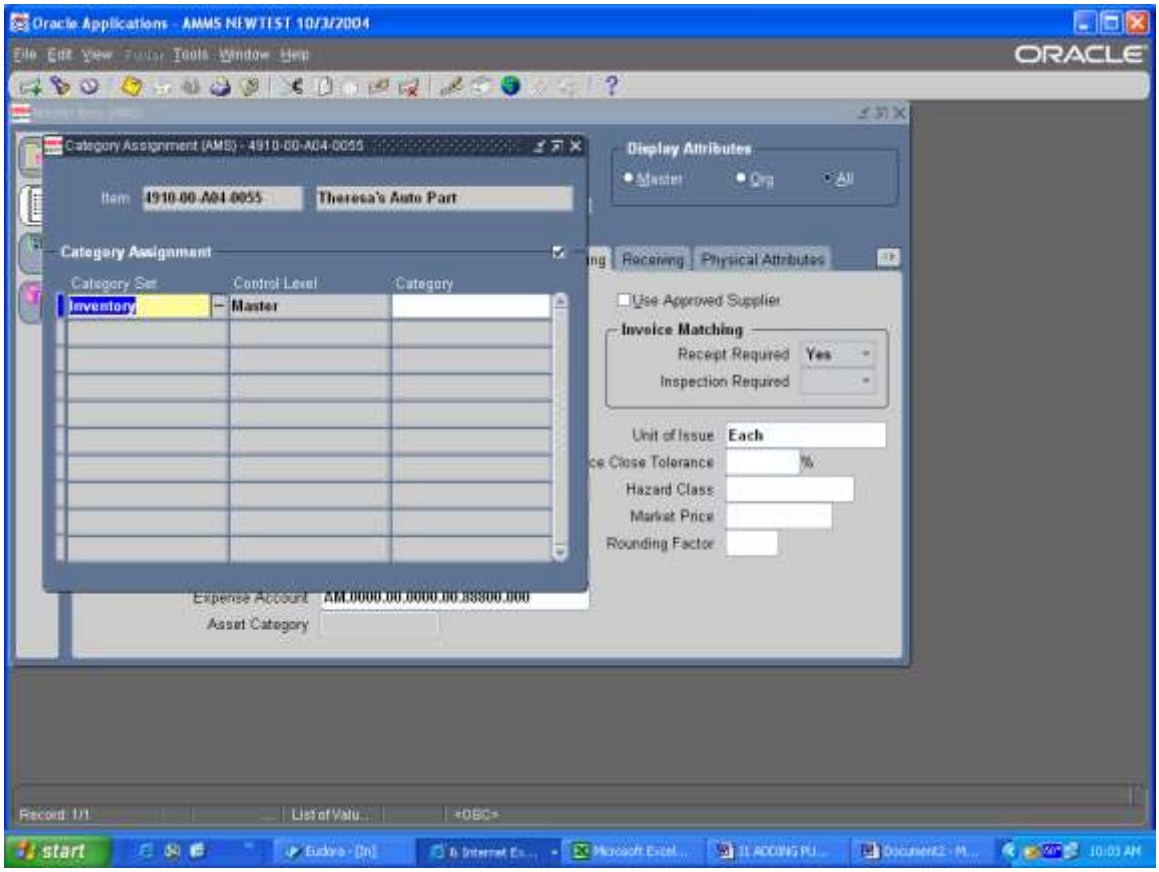
Step Description: Navigate to “Tools” and choose “Categories

Expected Results: Category form opens.



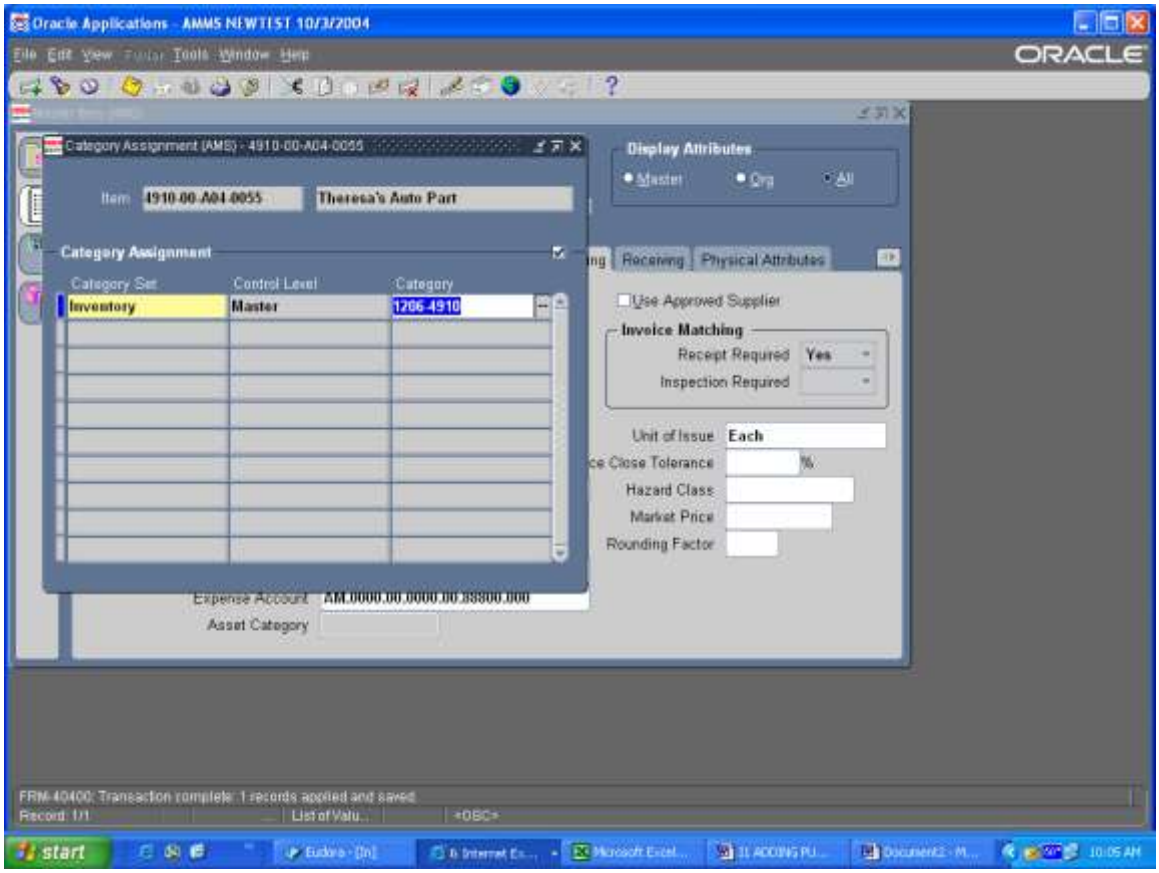
Step Description: At the Category Set field click on the LOV and choose “Inventory”

Expected Results/Actions: Field is populated.



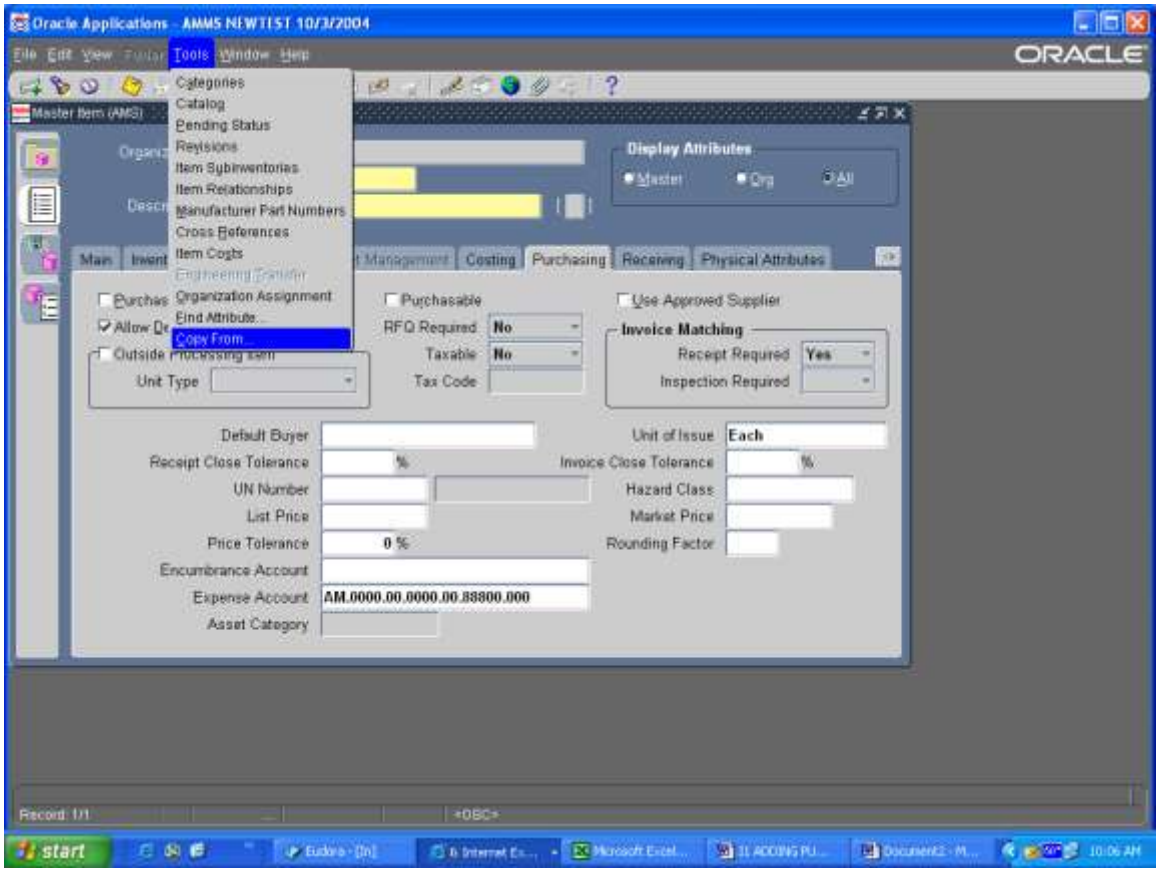
Step Description: Tab to Category and Enter the Correct Category (NIAC) for that new item number, SAVE and CLOSE form.

Expected Results/Actions: Transaction Complete Message at the bottom of the form.



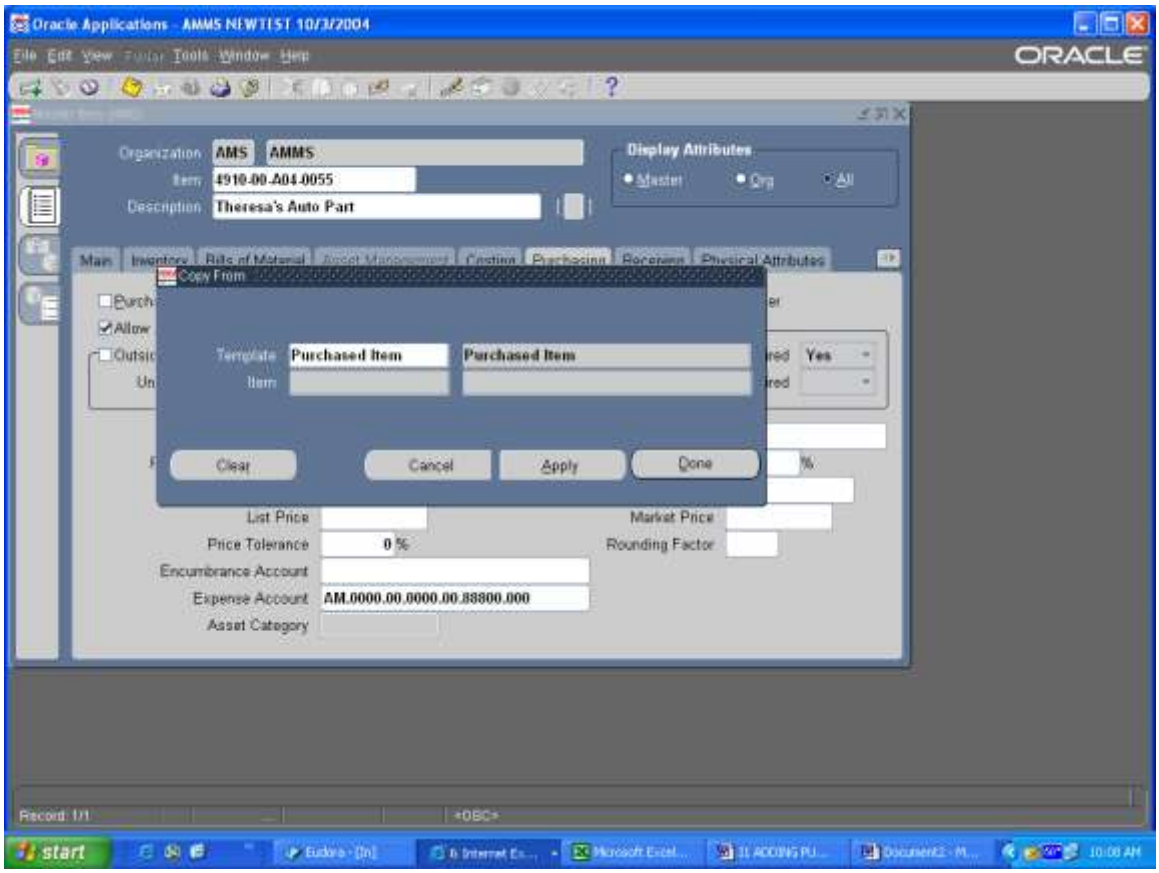
Step Description: Navigate to “Tools” and choose “Copy From”

Expected Results/Actions: Copy From form opens



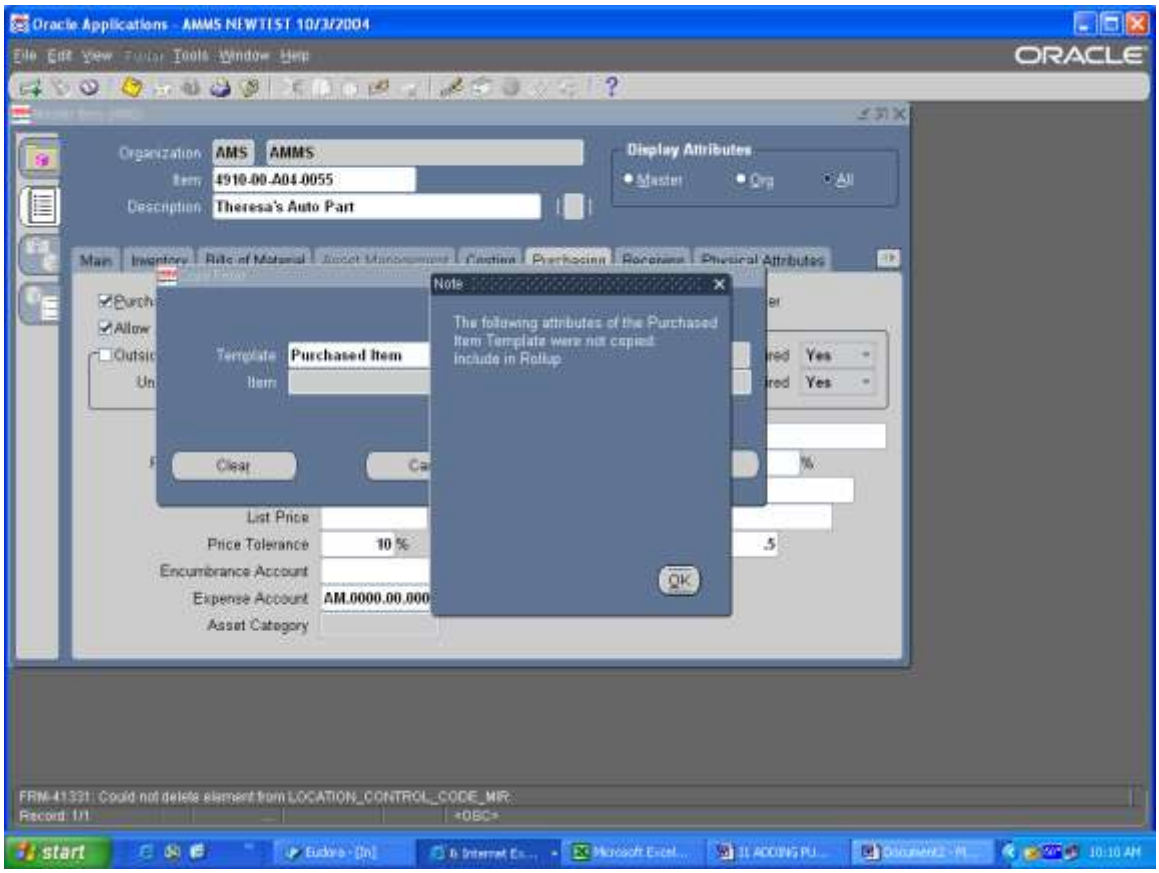
Step Description: Click on the LOV and select “EXPENSE” to copy an Item Template. Click “Apply” then click “Done”

Expected Results/Actions: Note Message will appear



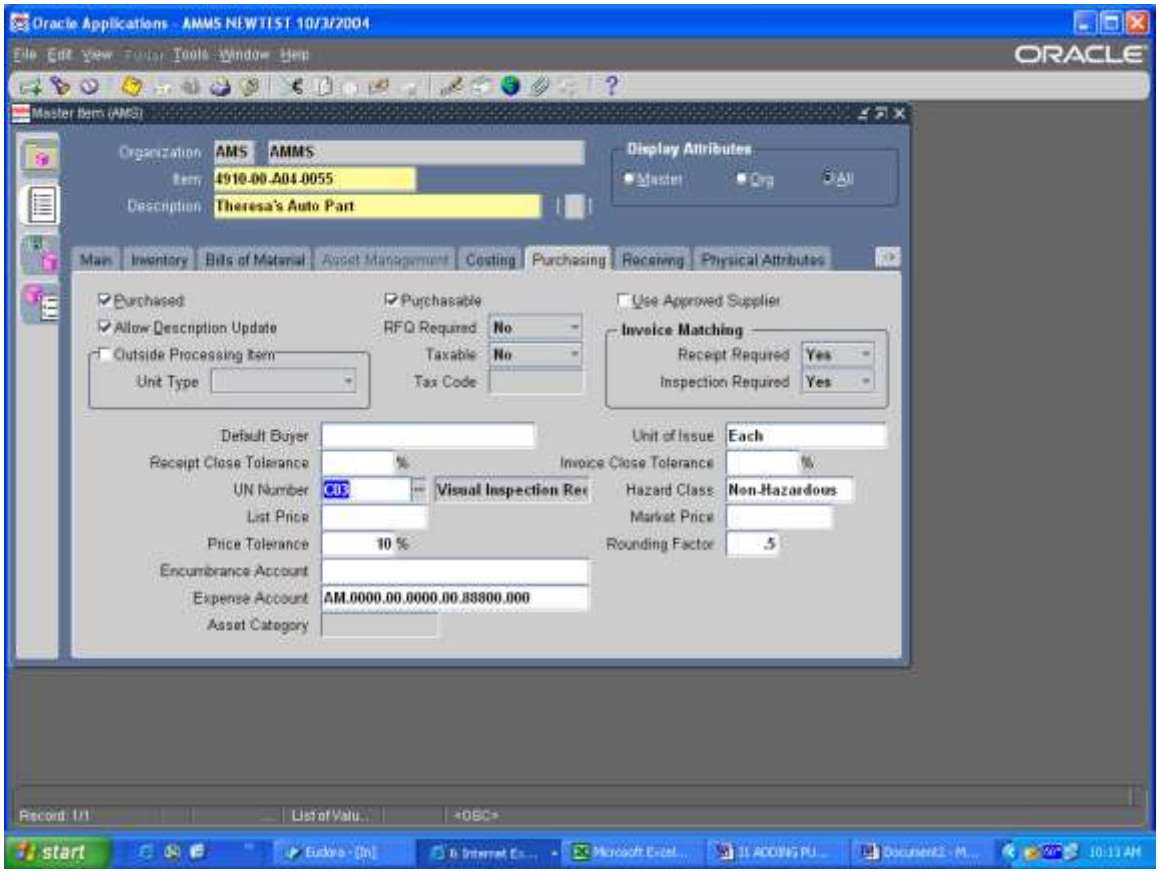
Step Description: Note Window will appear with message “The following attributes of the Purchased Item Template were not copied: Include in Roll UP. Click OK to this Note.

Expected Results/Actions: Window will close, Returns to the Master Items form with “Template Implemented” message at the bottom of the form.



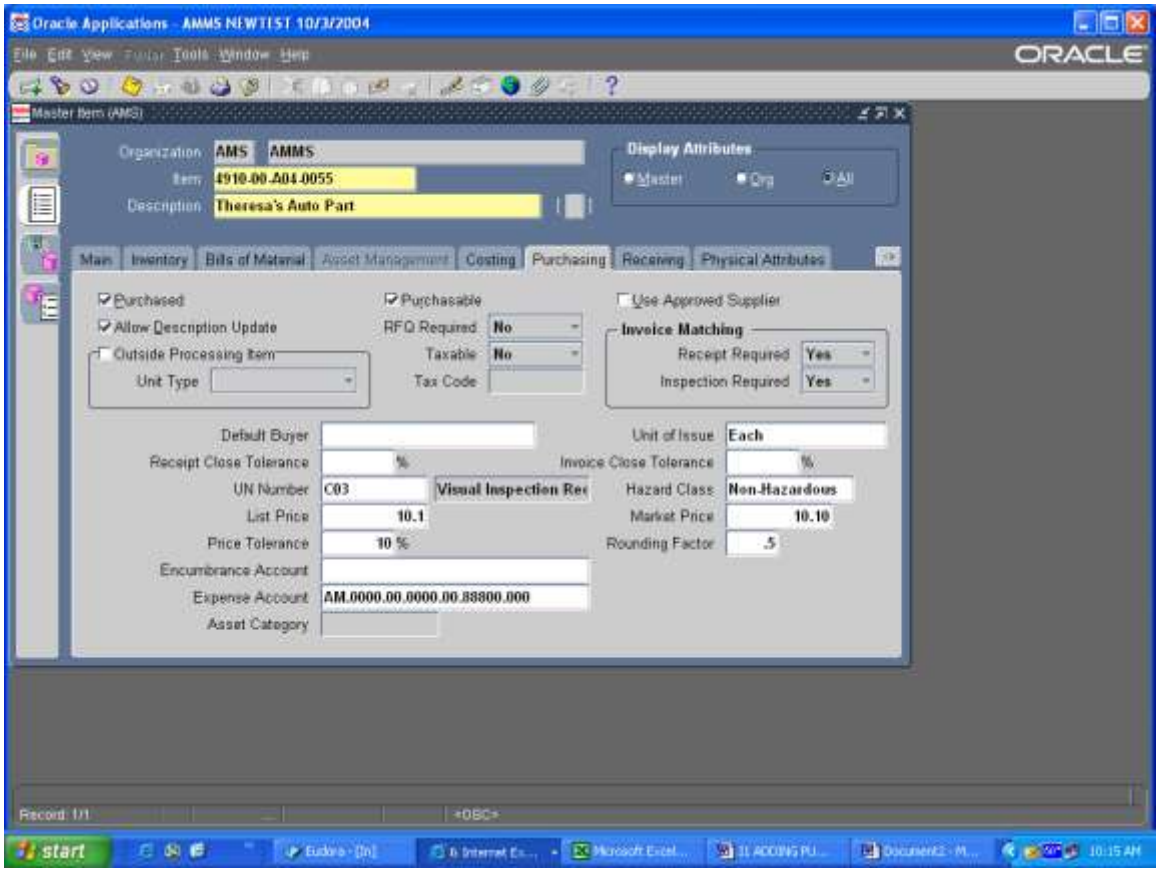
Step Description: Navigate to the “Purchasing” Tab and verify the UN code it will default to CO3 if different change UN code.

Expected Results/Actions: Field is populated.



Step Description: “Purchasing” Tab enter the “List and Market Price” of the item

Expected Results/Actions: Field is populated



Step Description: At the Purchasing Tab in the Expense Account Field, change the GL number to:

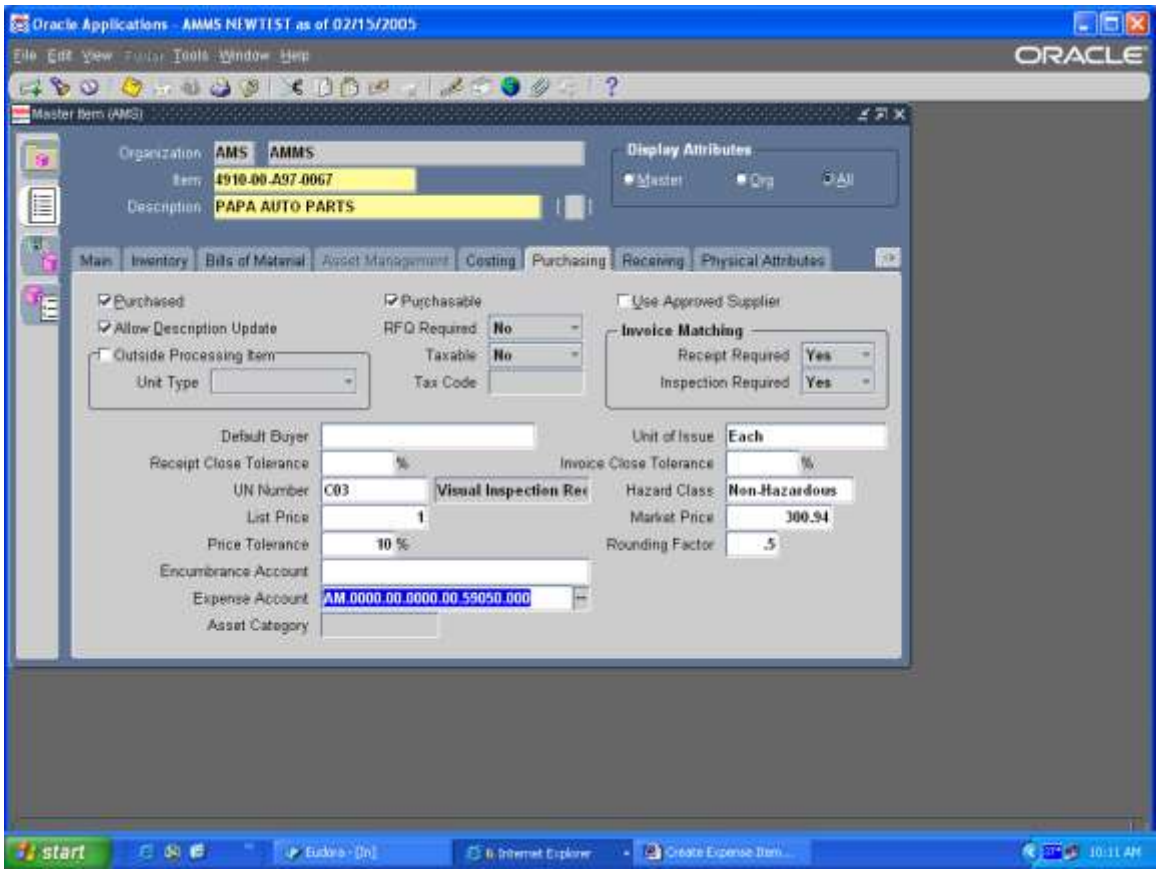
AM.0000.00.0000.00.59050.000 – for Auto Part Expense Items

AM.0000.00.0000.00.59060.000- for EEE Expense Items

AM.0000.00.0000.00.59070.000 – for Furniture Expense Items

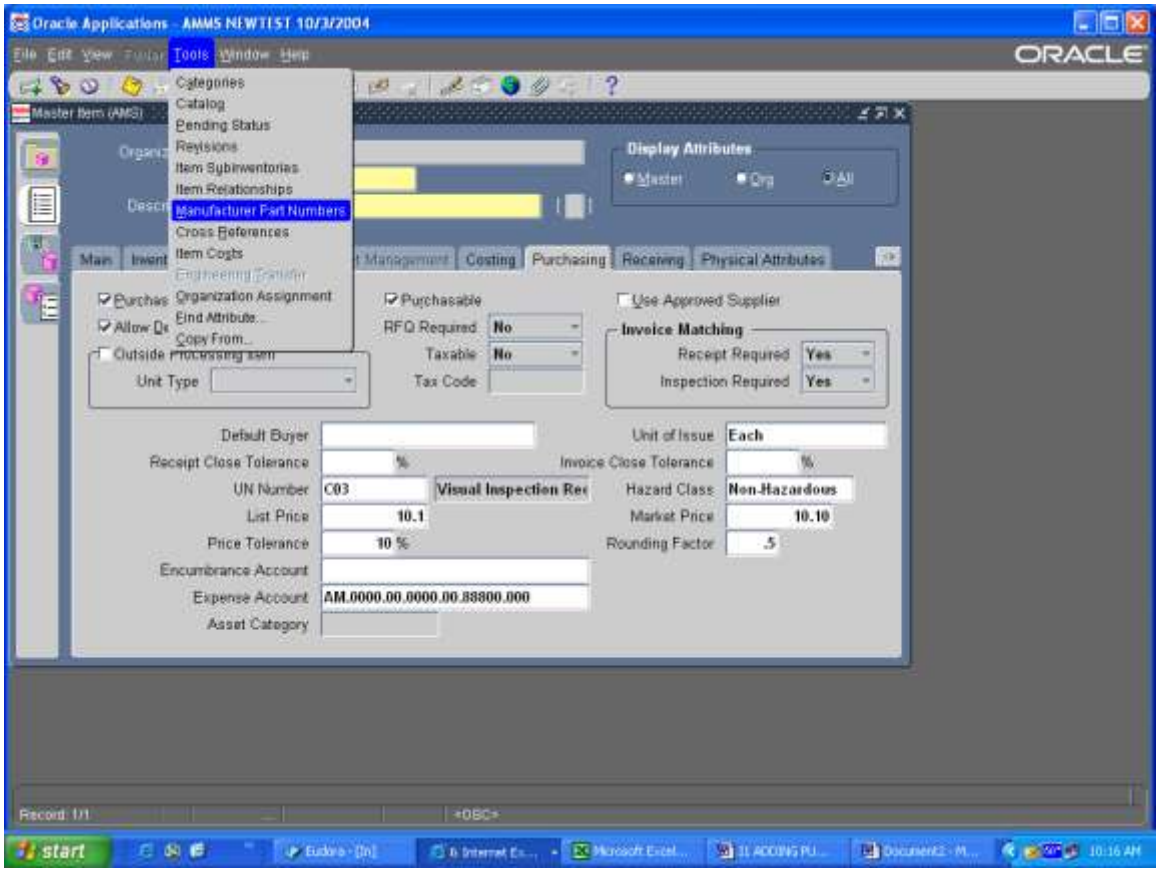
AM 0000.00.0000.00.59061.000 – for Special EEE Expense Items

Expected Results: Account Number will change



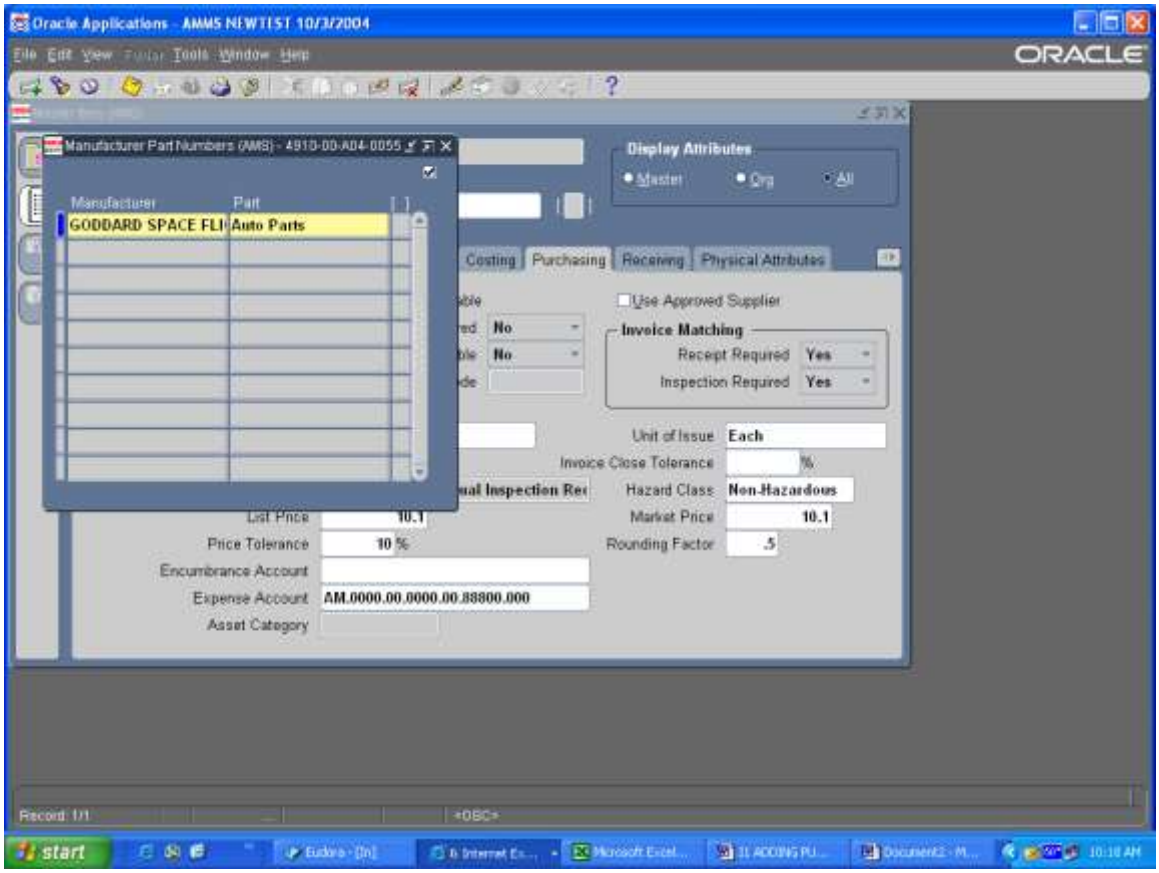
Step Description: Navigate to “Tools” and choose “Manufacturer Part Number”

Expected Results/Actions: Manufacturer Form is opened



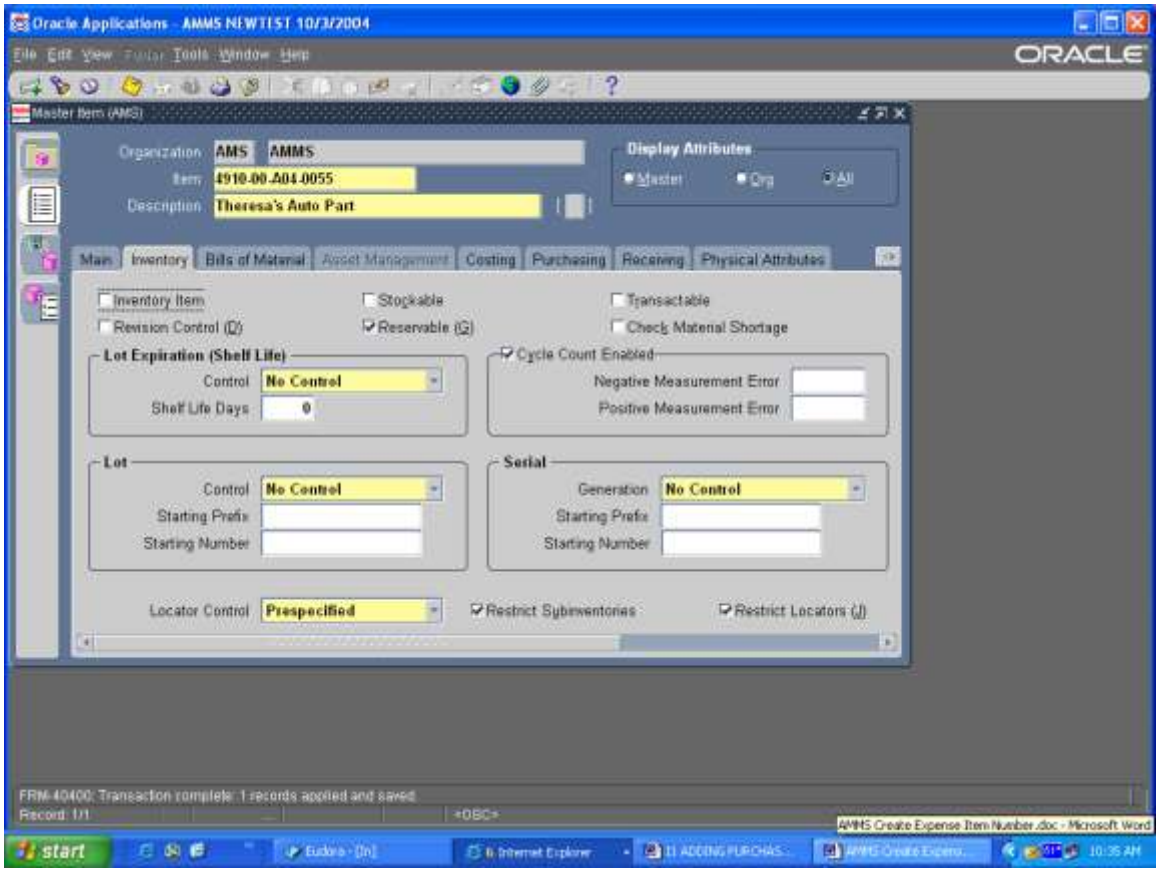
Step Description: Choose the Manufacture from the LOV and enter the part number. Click on “Save” then close the form.

Expected Results/Actions: Manufacture information is populated



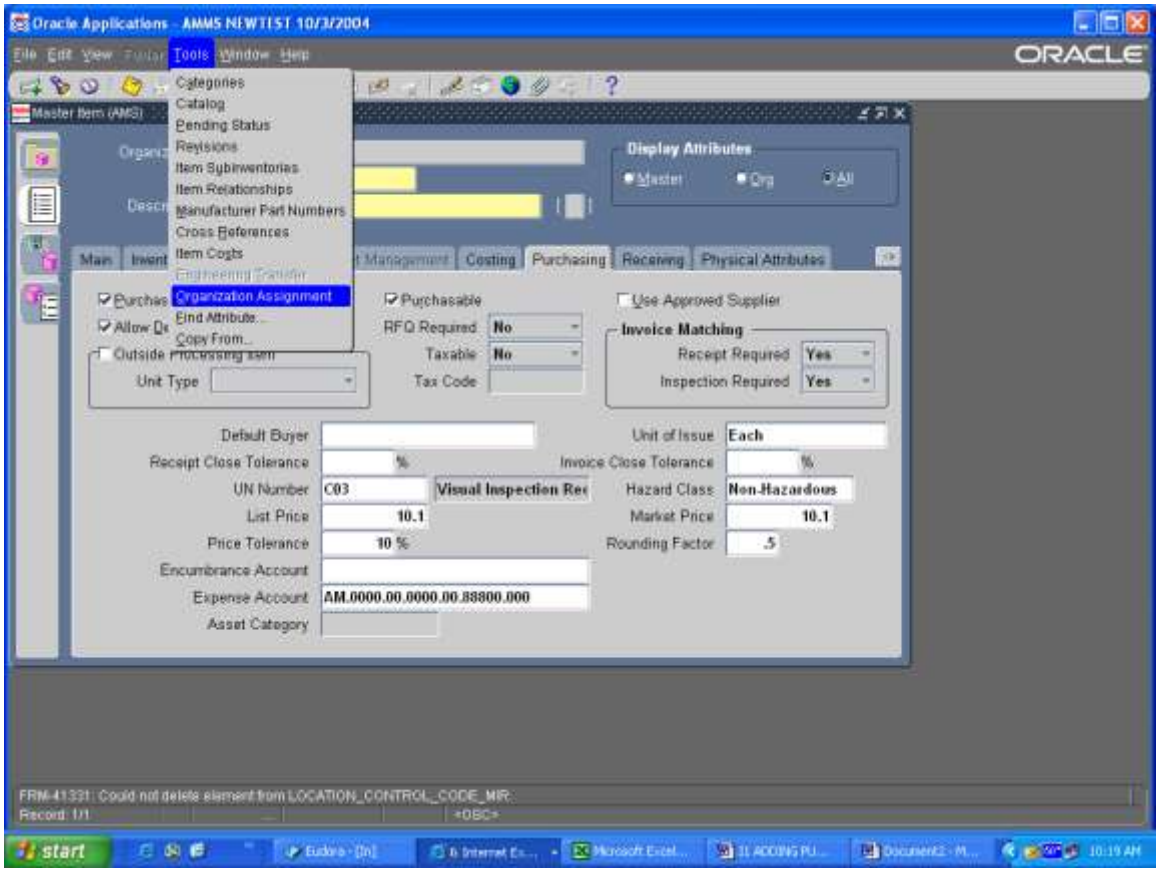
Step Description: Navigate to the “Inventory” Tab if the Inventory box is already unchecked, ok but if not un-check the Inventory box, this will also uncheck the Stockable and Transactable boxes, Save your work

Expected Results/Actions: Check boxes un-checked and Transactions Saved and Applies



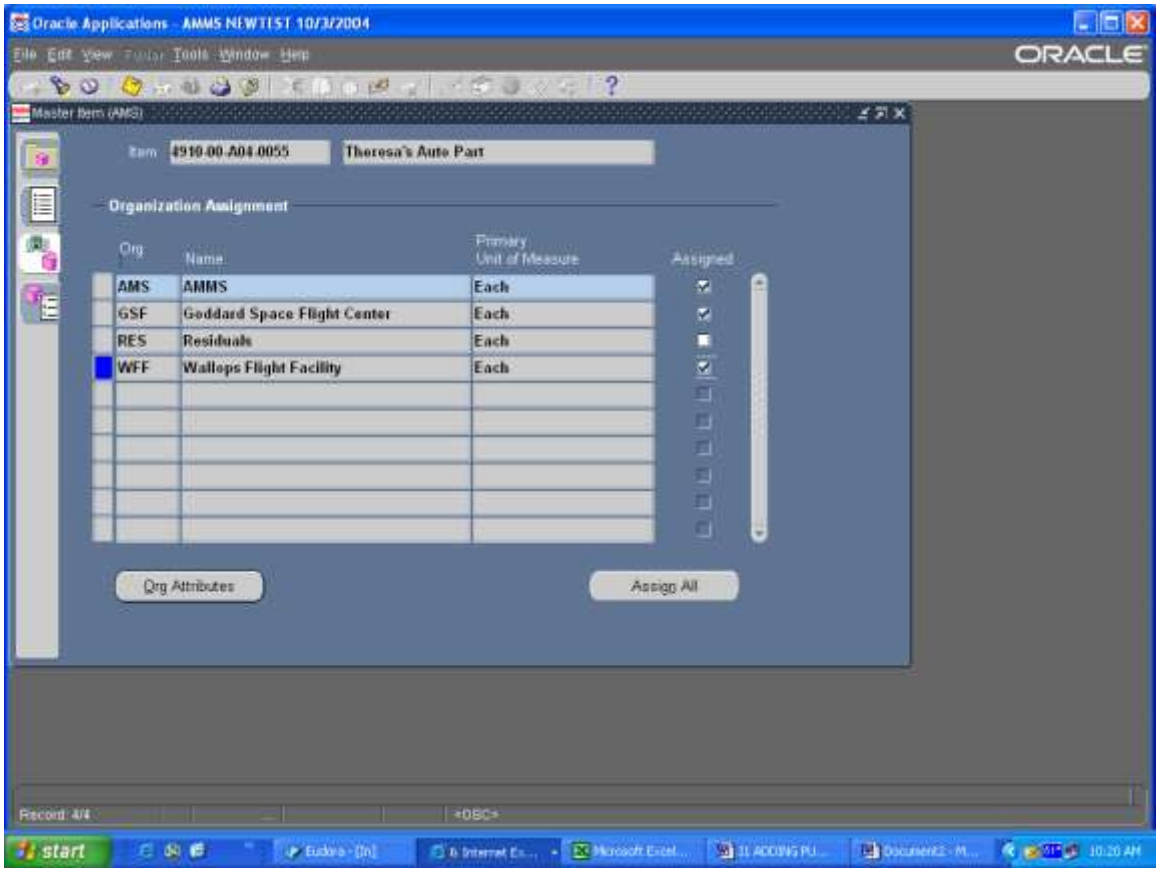
Step Description: Navigate to “Tools” and choose “Organization Assignment”

Expected Results/Actions: Organization Assignment form is opened.



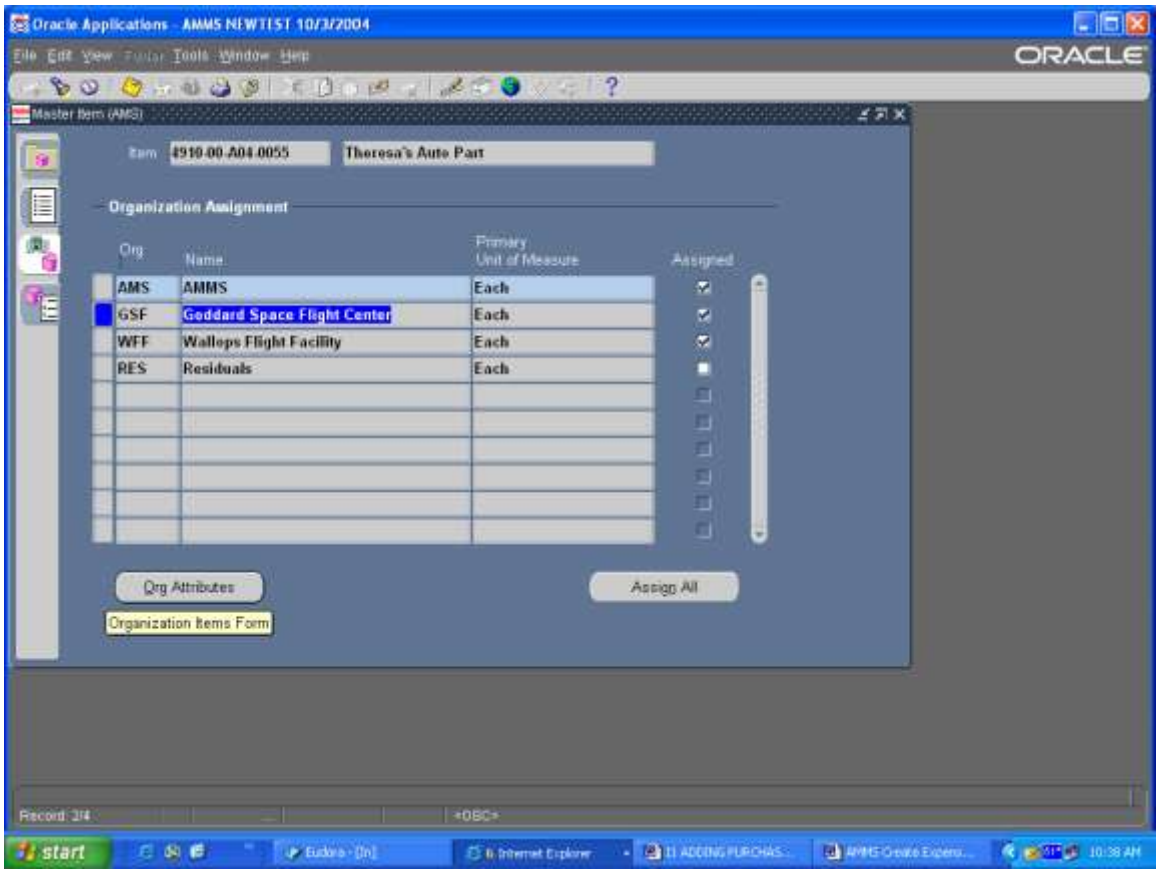
Step Description : Click on the white box next to GSF and WFF

Expected Results/Actions: All GSF and WFF have check marks next to them.



Step Description: From the Organization Assignments screen click on the GSF and then click on the Org Attributes button at the bottom of the screen

Expected Results/Actions: Organization Item window appears



Step Description: At the Organization level navigate to the Purchasing Tab and update the Expense Account number with the appropriate GL #:

GD.0000.00.0000.00.59050.000 – for Auto Parts Expense Items

GD.0000.00.0000.00.59060.000 – for EEE Expense Items

GD.0000.00.0000.00.59070.000 – for Furniture Expense Items

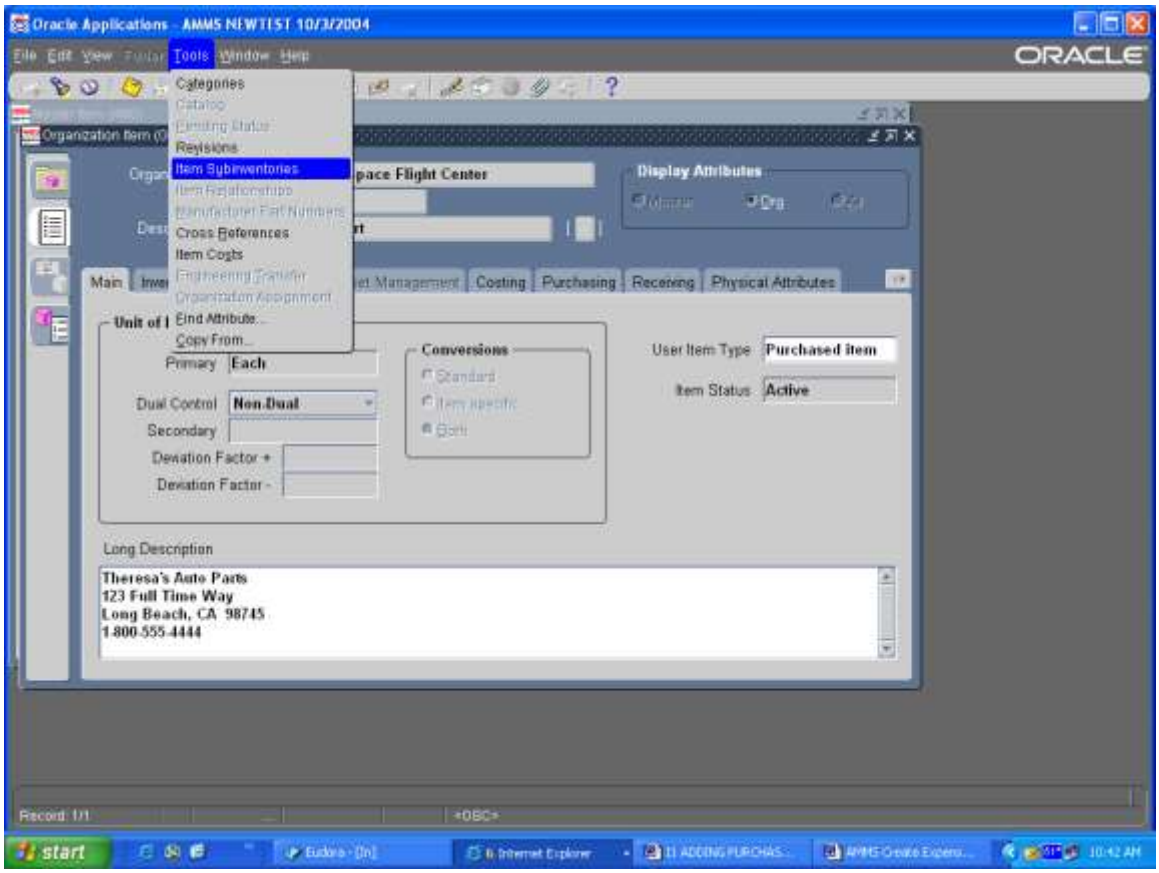
GD 0000.00.0000.00.59061.000 – for Special EEE Expense Items

Expected Results: Account Number will change

NOTE:
The Expense Account Number will need to be changed at both the GSF and the WFF Organizations.

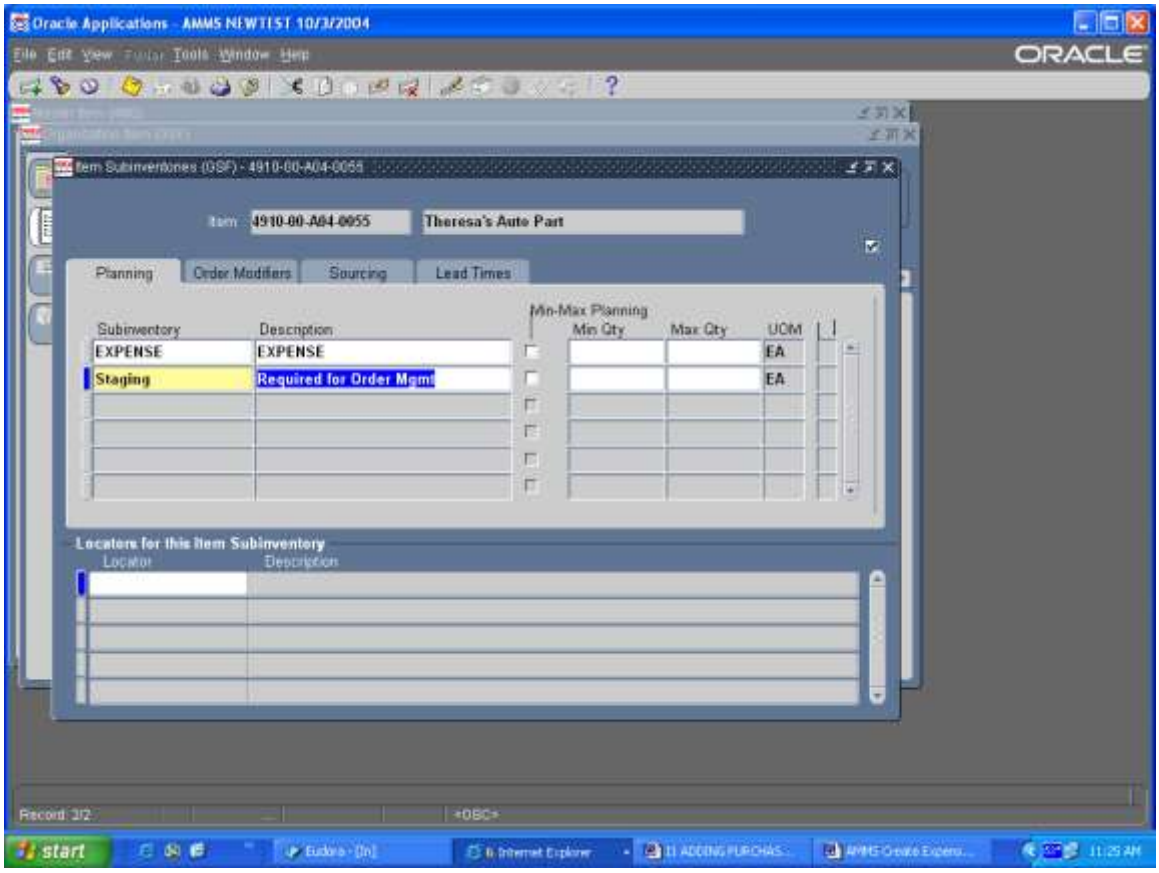
Step Description: Verify that all of the other information at the Organization Level is the same as the information you entered at the Master Level. Navigate to “Tools” and choose “Item Sub inventory”

Expected Results/Actions: Item Sub inventory Form opens



Step Description: Choose the correct sub inventory from the LOV then click “OK” For Expense items to select the Appropriate Expense sub inventory, all items MUST be assigned to the Staging sub inventory. There are no Locators required for Expense items.

Expected Results/Actions: Sub inventory Information is Populated



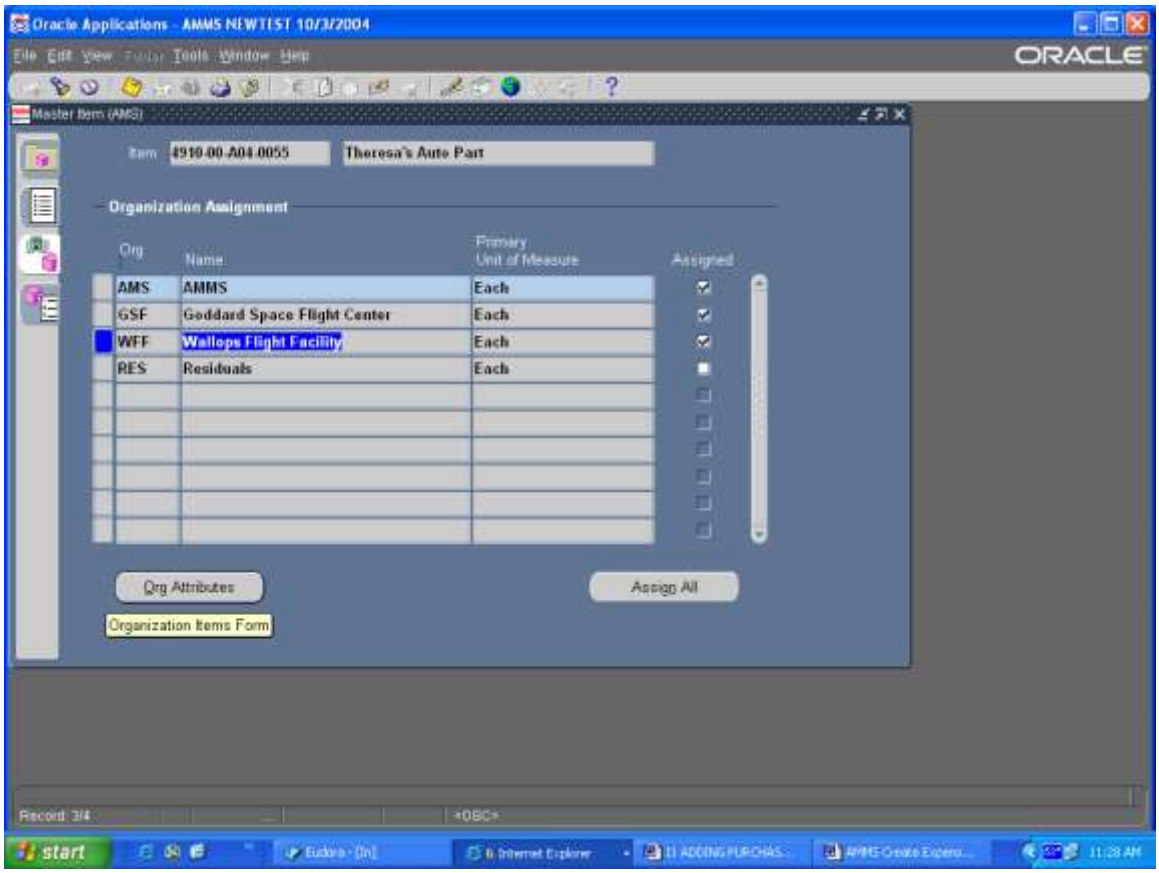
Step Description: Click on “Save” and close form

Expected Results/Actions: Transaction Complete Message.

Note: You need to add sub inventories to both Organizations GSF and WFF.

Step Description: Click the GSF Organization Item screen and select the WFF Wallops Organization assignment click on the Organization Attributes button at the bottom of the screen

Expected Results: The Wallops Organization Item window will appear.



Step Description: Verify all data is the same as the Master Item Record and add the appropriate sub inventories following the same steps for the GSF Organization.

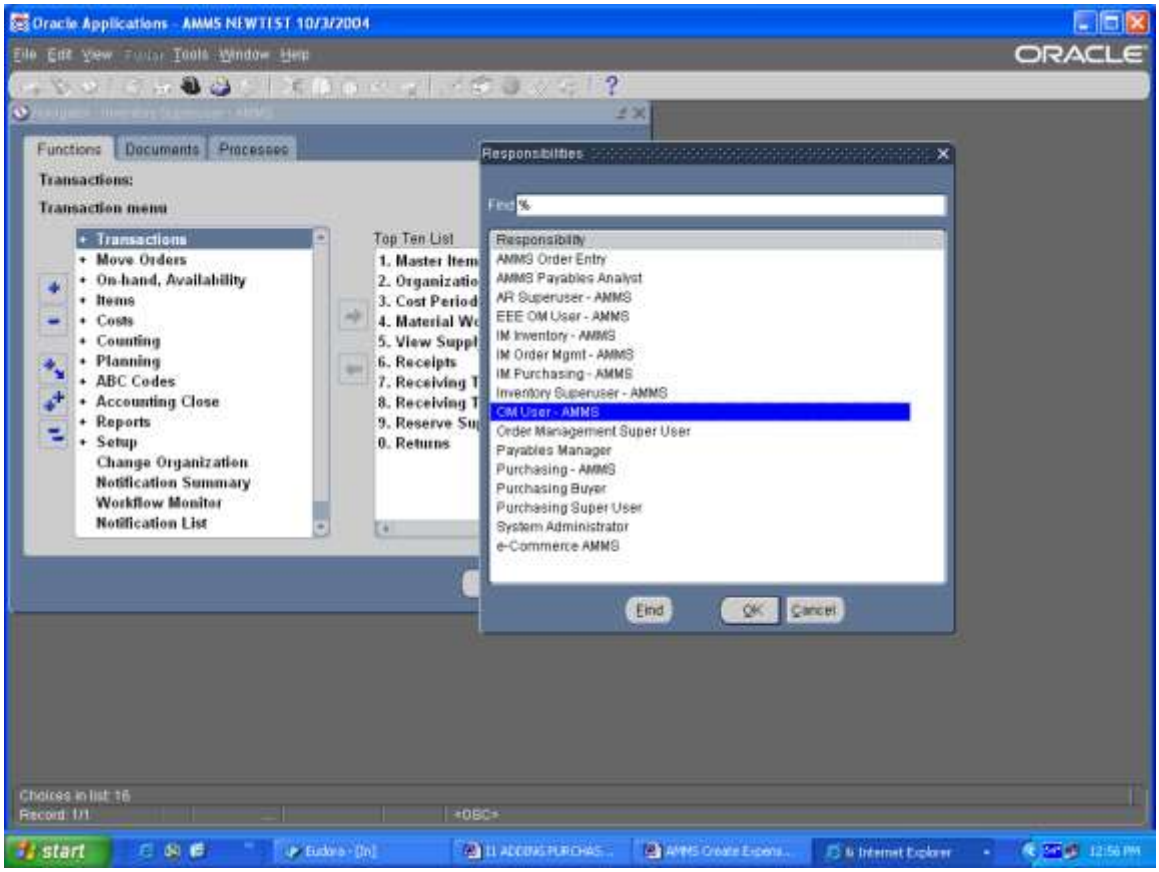
Expected Results/Actions: Sub inventories will be assigned.

Step Description: Save your work and close all forms.

Expected Results/Actions: Will be back at the IM Inventory AMM Menu

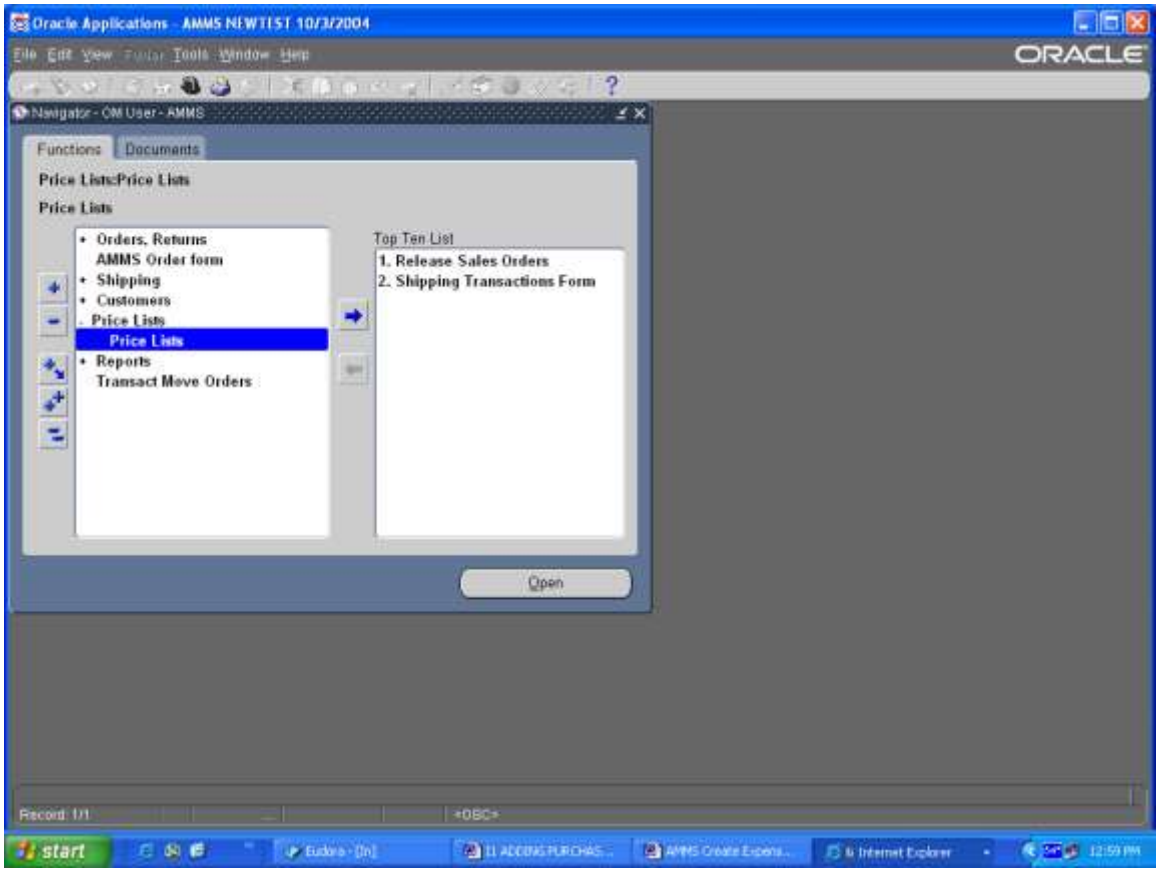
Step Description: Change responsibilities to the OM USER Responsibility

Expected Results/Actions: The OM USER main menu will appear



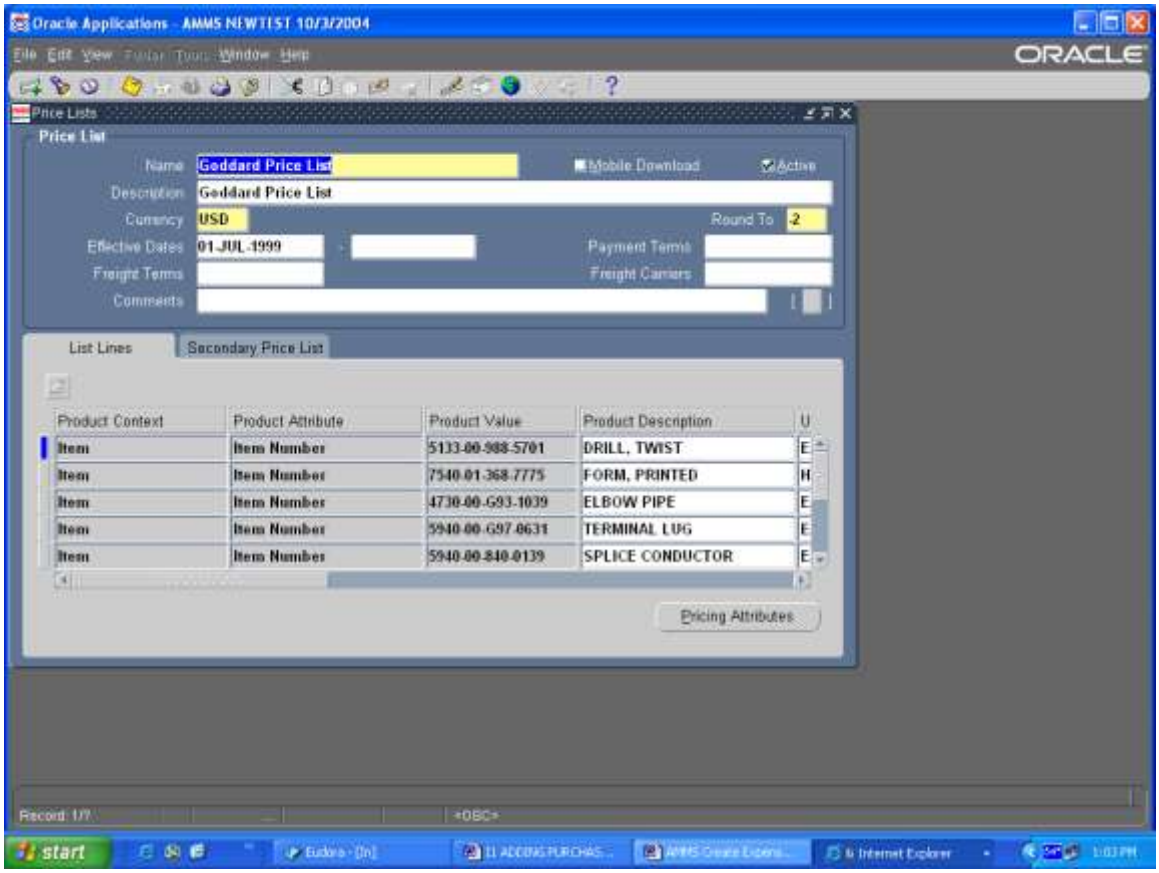
Step Description: Select Price Lists> Price List from the menu and click on open

Expected Results/Actions: A blank Price List screen will appear



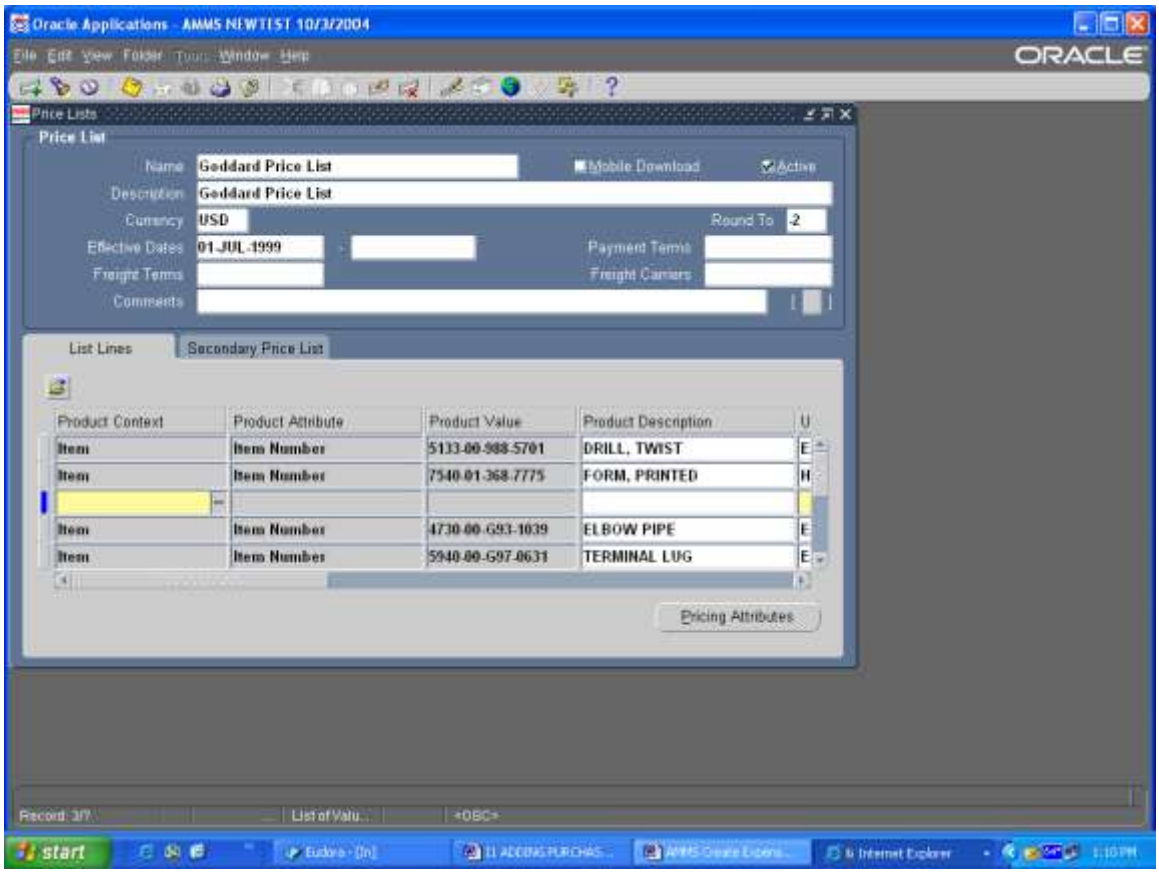
Step Description: On your keyboard hit the F11 button to send Oracle into query mode, then hold down the Ctrl button and hit F11 again to initiate the query.

Expected Results/Actions: The Goddard Price List will appear



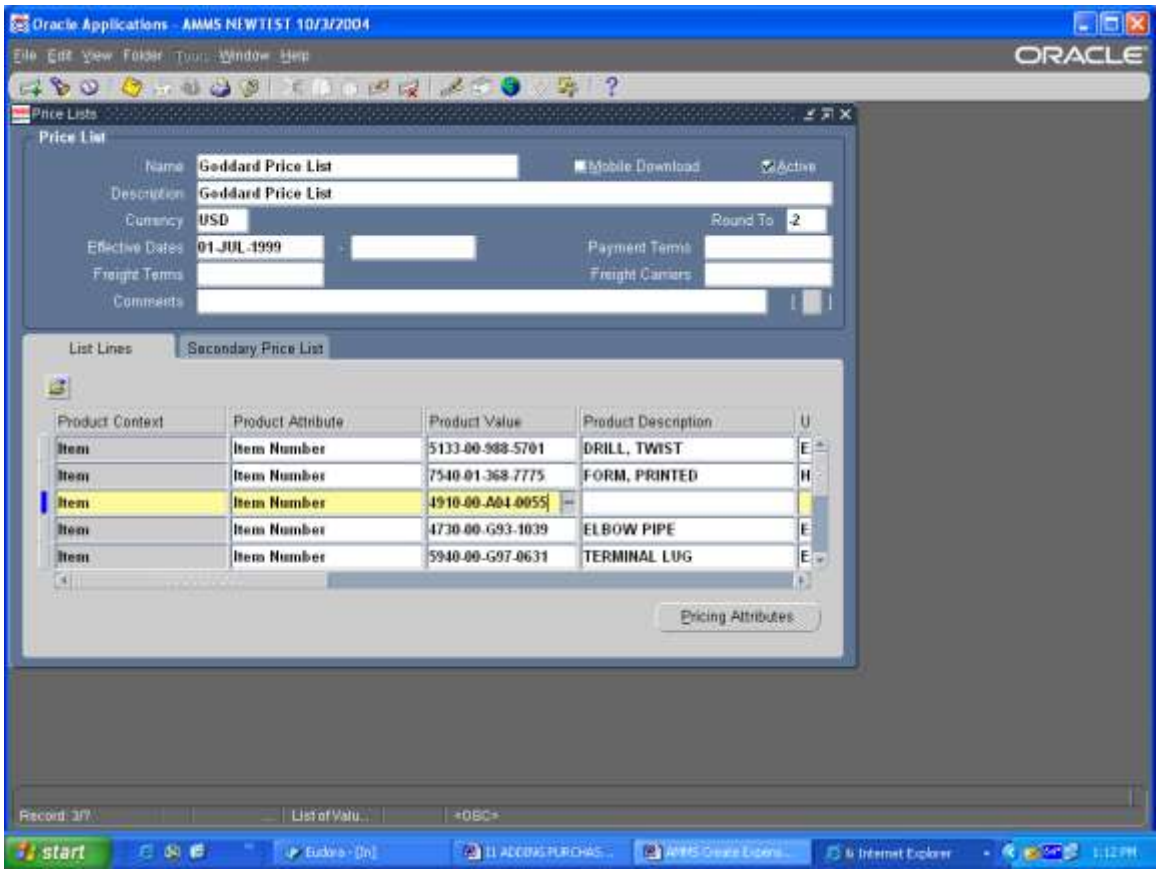
Step Description: At the bottom of the Goddard Price List, in the List Line section, click on an occupied line then click on the green plus sign (+) on the tool bar to add a new line, make sure you are at the bottom of the screen.

Expected Results/Actions: A blank line will appear and the Item field will be yellow



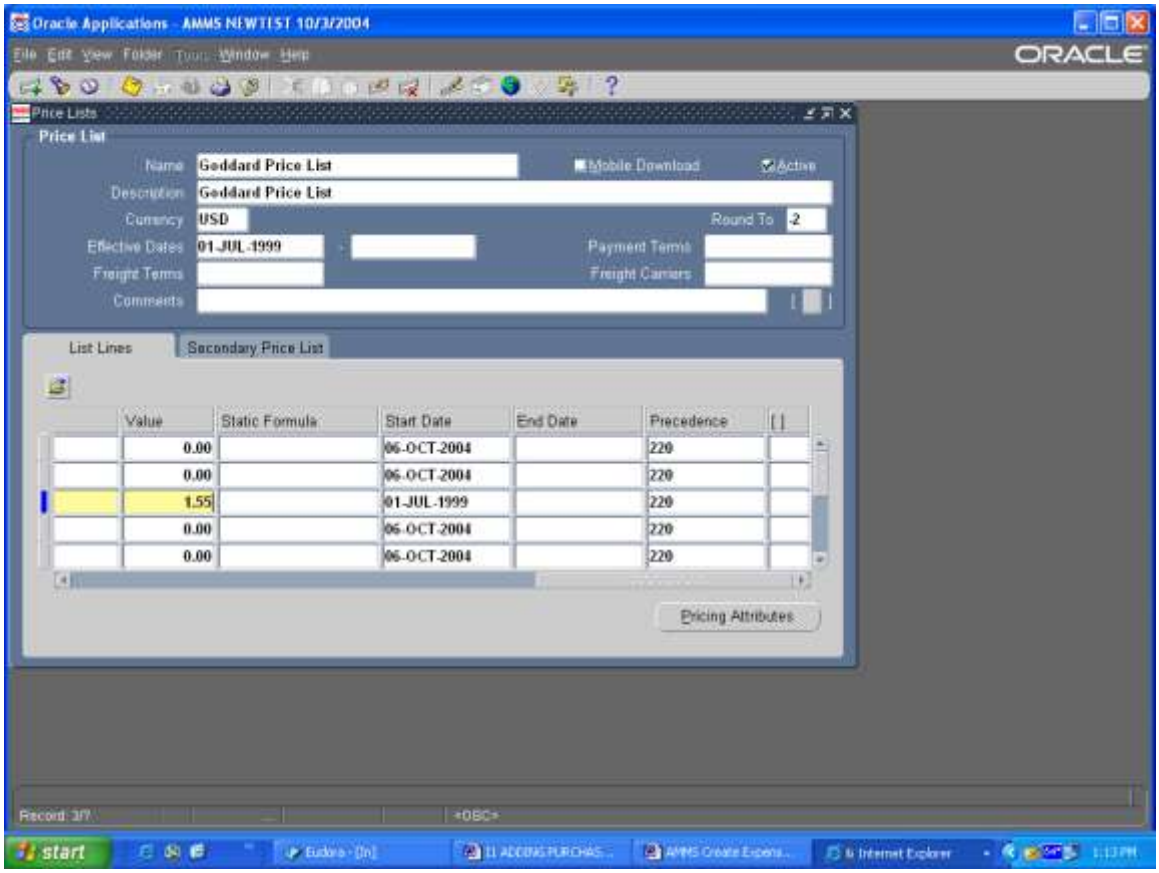
Step Description: In the Item field click on the LOV and select Item from the list, tab to the Product Attribute field and click on the LOV and select Item Number from the list. In the Product Value field enter the Item number you just loaded.

Expected Results/ Actions: All fields will be populated



Step Description: Tab over to the value field and enter the cost for the item. Example: 1.55

Expected Results/ Actions: Field will be populated with cost.



Step Description: Save your work and close all forms, Repeat the same process for the Wallops Price List.

Expected Results/Actions: Transactions Complete and Applies message at the bottom of screen, and will return to OM USER main menu.

This stock number is now loaded and on the Price List.

Notes: Expense item are not Inventory items, they can not be transacted against like other item numbers.

All Expense items must be added to both Price Lists. The sales order can not be created until the items are on the price lists.

AMMS TRAINING SCRIPT

ADDING FURNITURE EXPENSE ITEM TO ORACLE

Purpose

The purpose of this training script is to demonstrate how a Material Coordinators and Supply Technician Lead will add a new Furniture Expense stock number to the Oracle data base. This particular item number is not an inventory and will use the Template of Furniture Expense. After the item has been added to the system you also have to add it to BOTH Mater Price Lists (GSF and WFF).

Audience

Material Coordinator and Supply Technician Lead

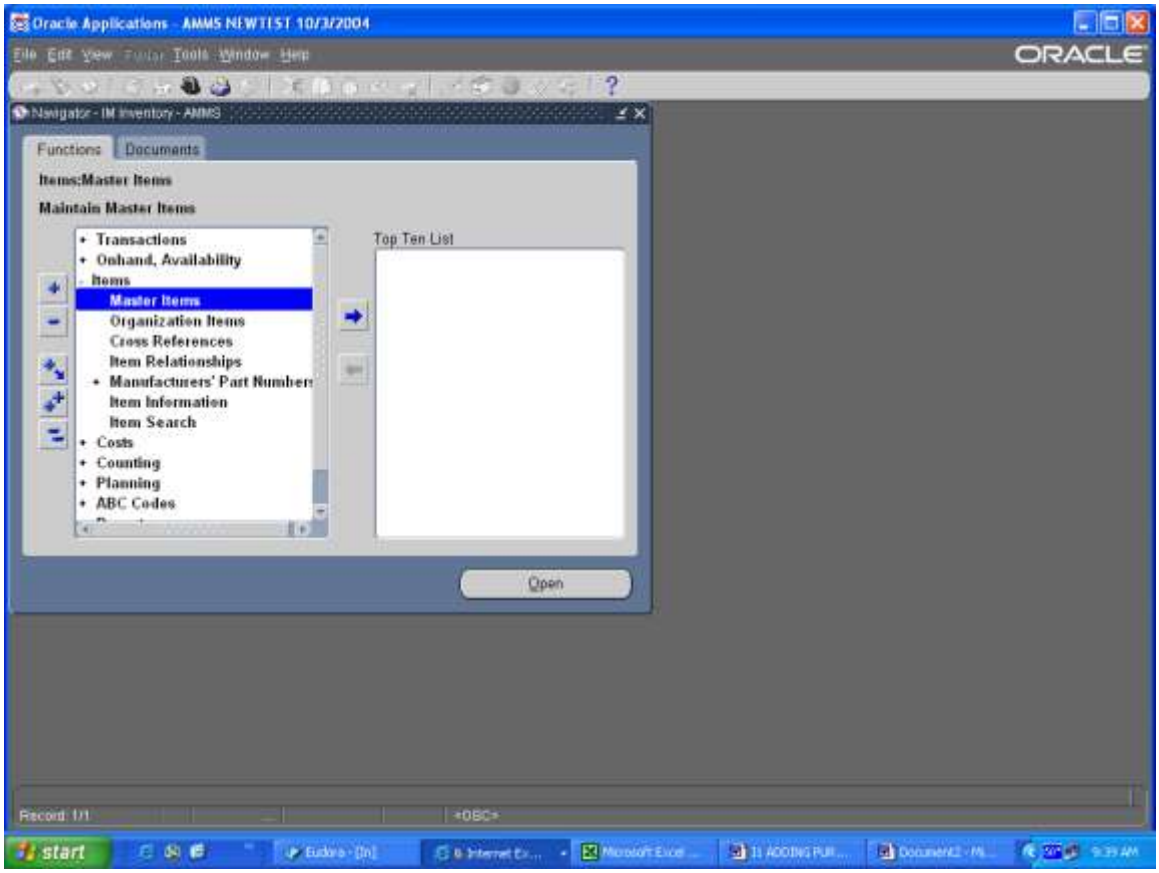
Prepared By	Theresa Coulson
Creation Date:	08/03/2005
Document Name	Create Furniture Expense Item Number.doc
Version	2
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Inventory.	

Step Description: Sign on to Oracle Applications and Select User Responsibility “IM Inventory AMMS”

Expected Results/Actions: Oracle Displays the Inventory main Menu

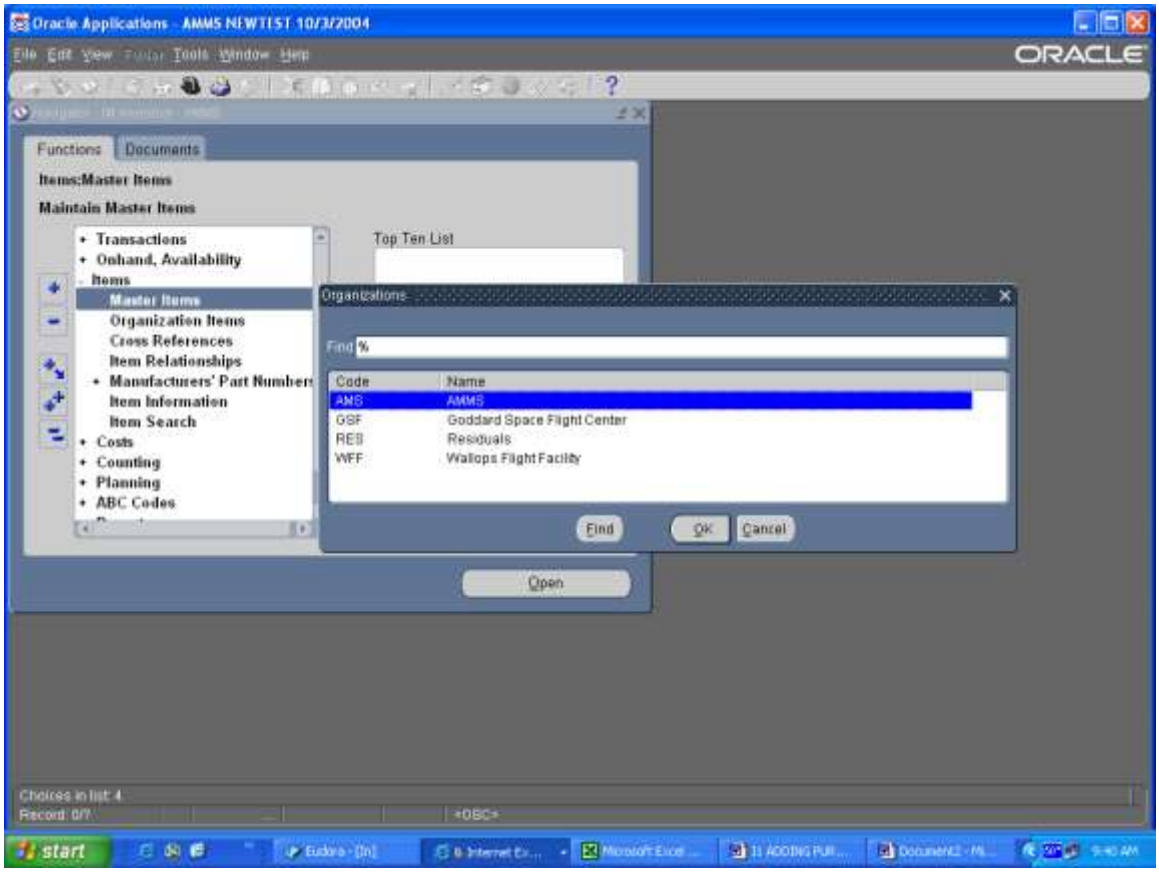
Step Description: Select “Items” then “Master Items”

Expected Results/Actions: Organization form opens.



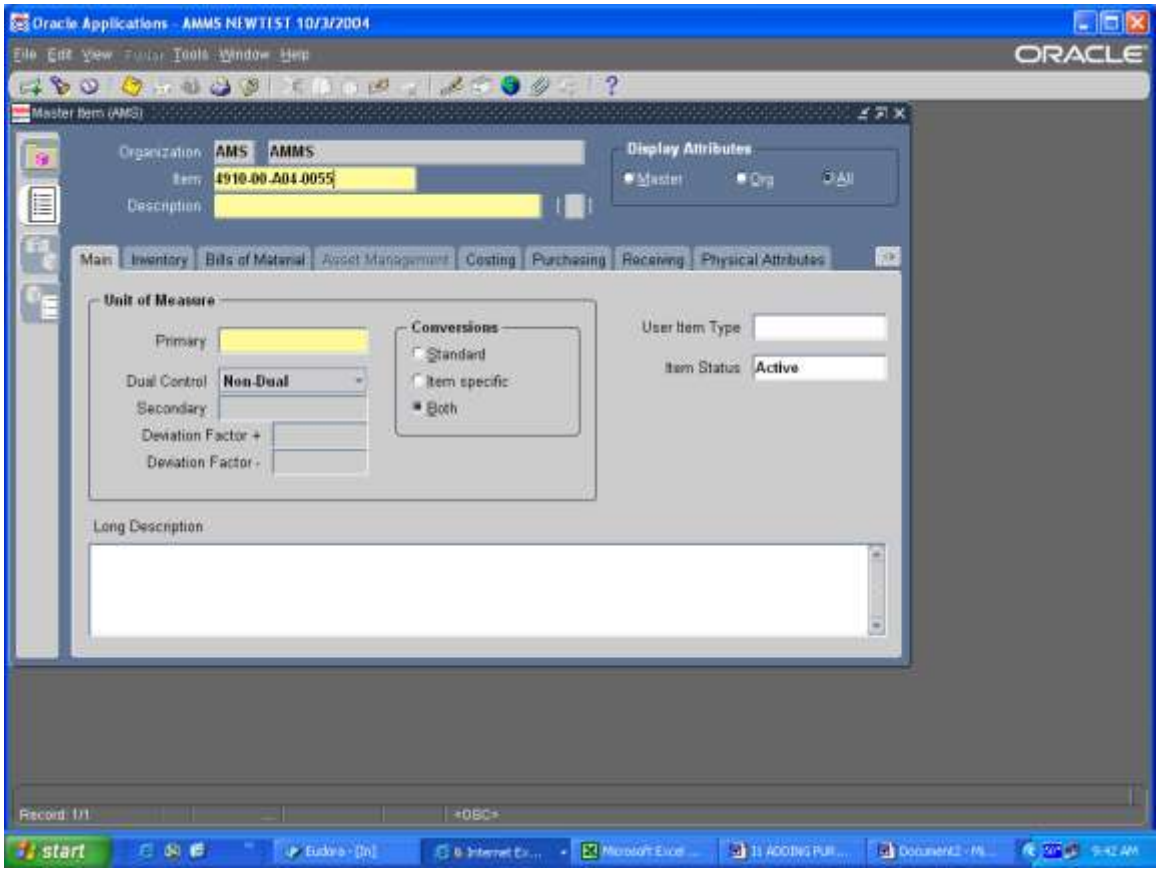
Step Description: Select “AMS” as the Organization and Click OK

Expected Results/Actions: Blank Master form opens.



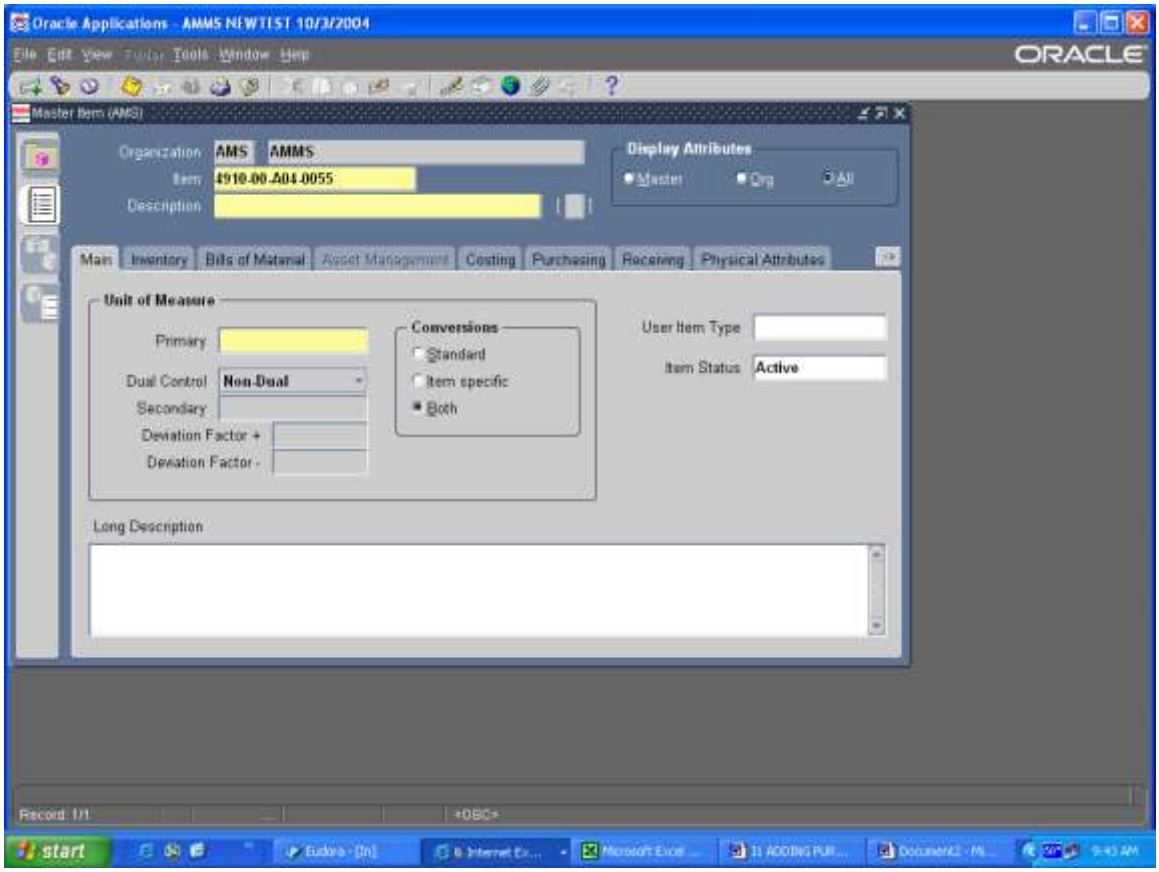
Step Description: Enter the New Item Number

Expected Results/Actions: Field is populated.



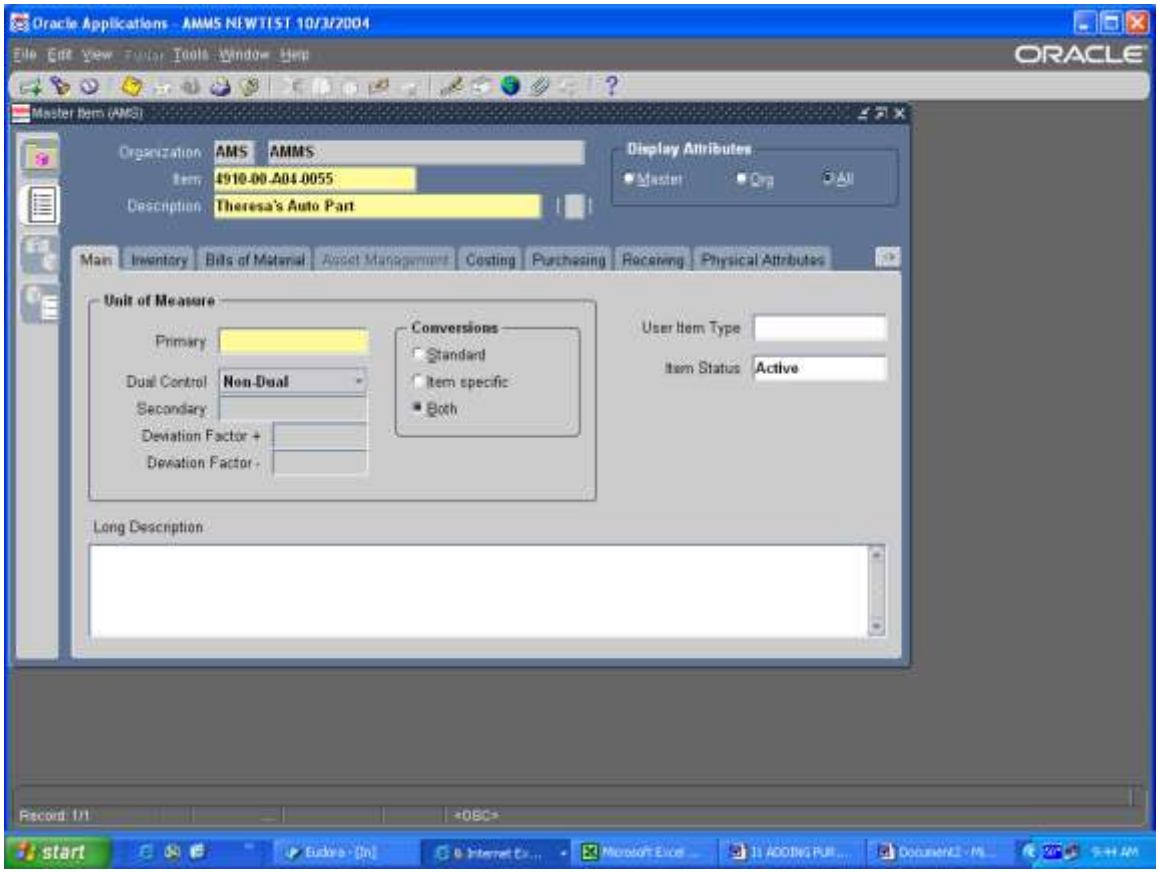
Step Description: Click on the Description Field

Expected Results/Actions: Cursor moves.



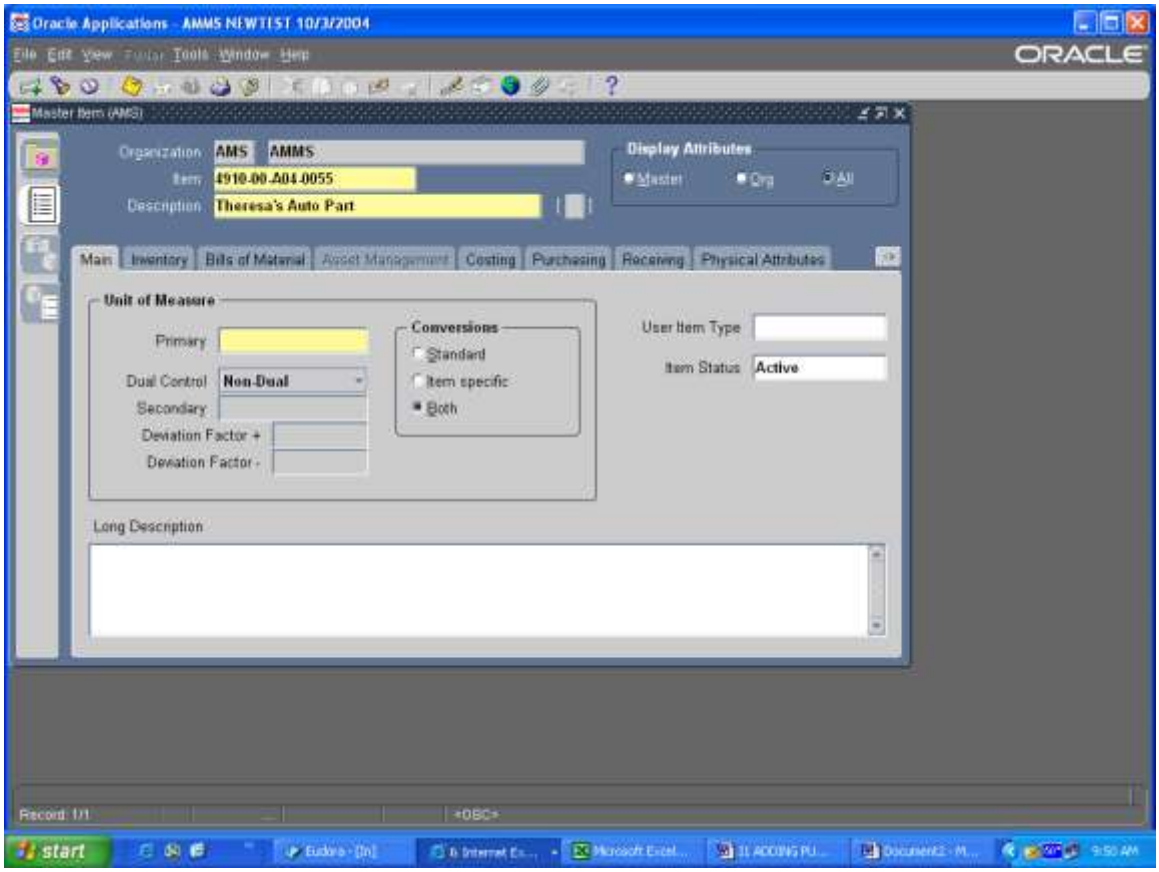
Step Description: Enter an Abbreviated Description (noun) for Expense items the Noun could possibly be the Vendor Name

Expected Results/Actions: Field is populated.



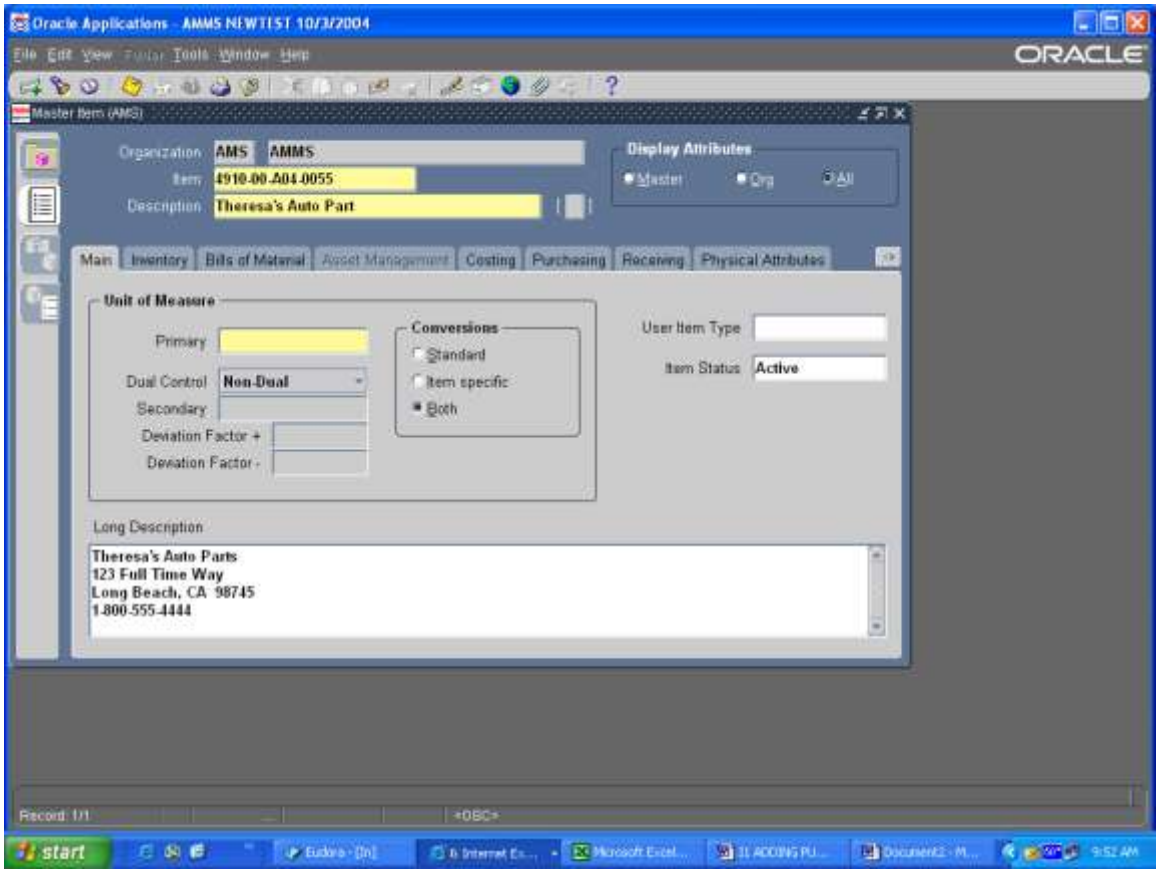
Step Description: Click on the Long Description field at the bottom of the screen

Expected Results/Actions: Cursor moves



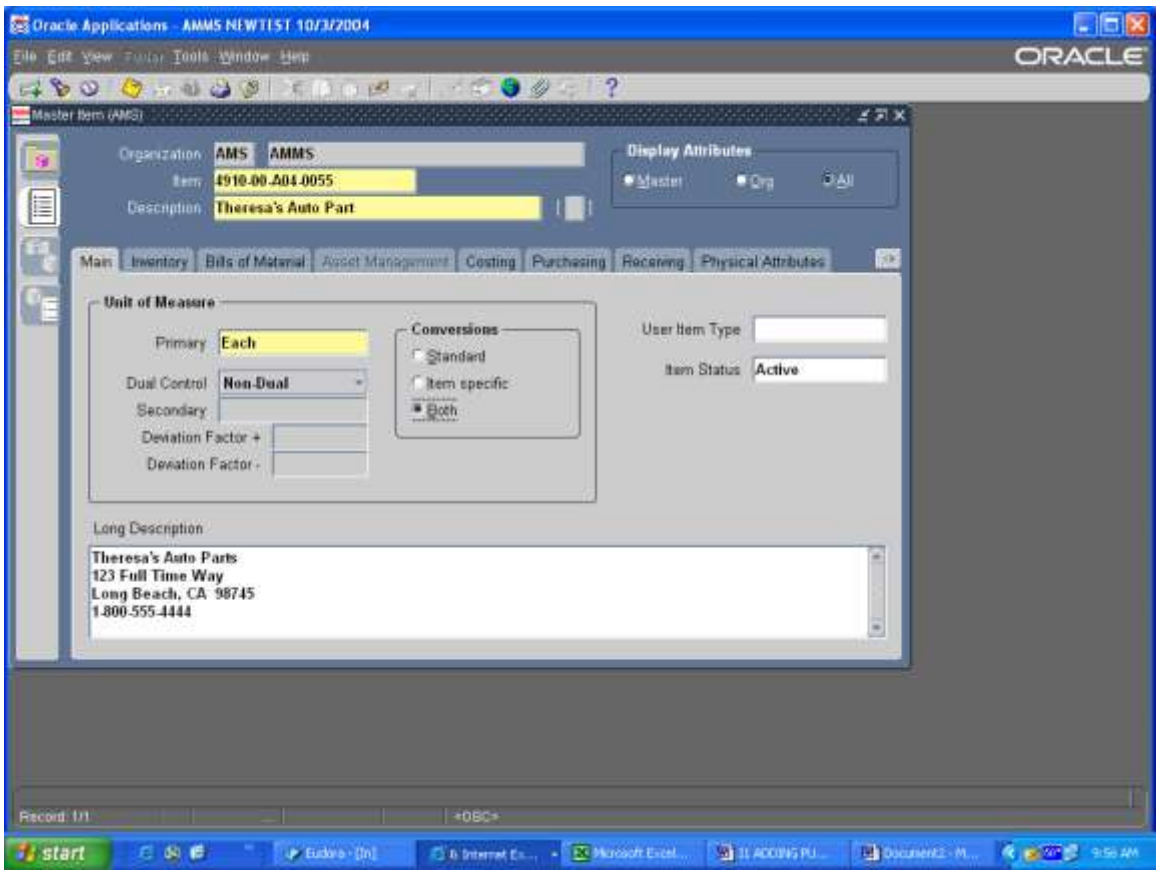
Step Description: Enter the Entire Item Description then, if the Noun is the Vendor name enter the Vendor information in the Description field

Expected Results/Actions: Field is populated.



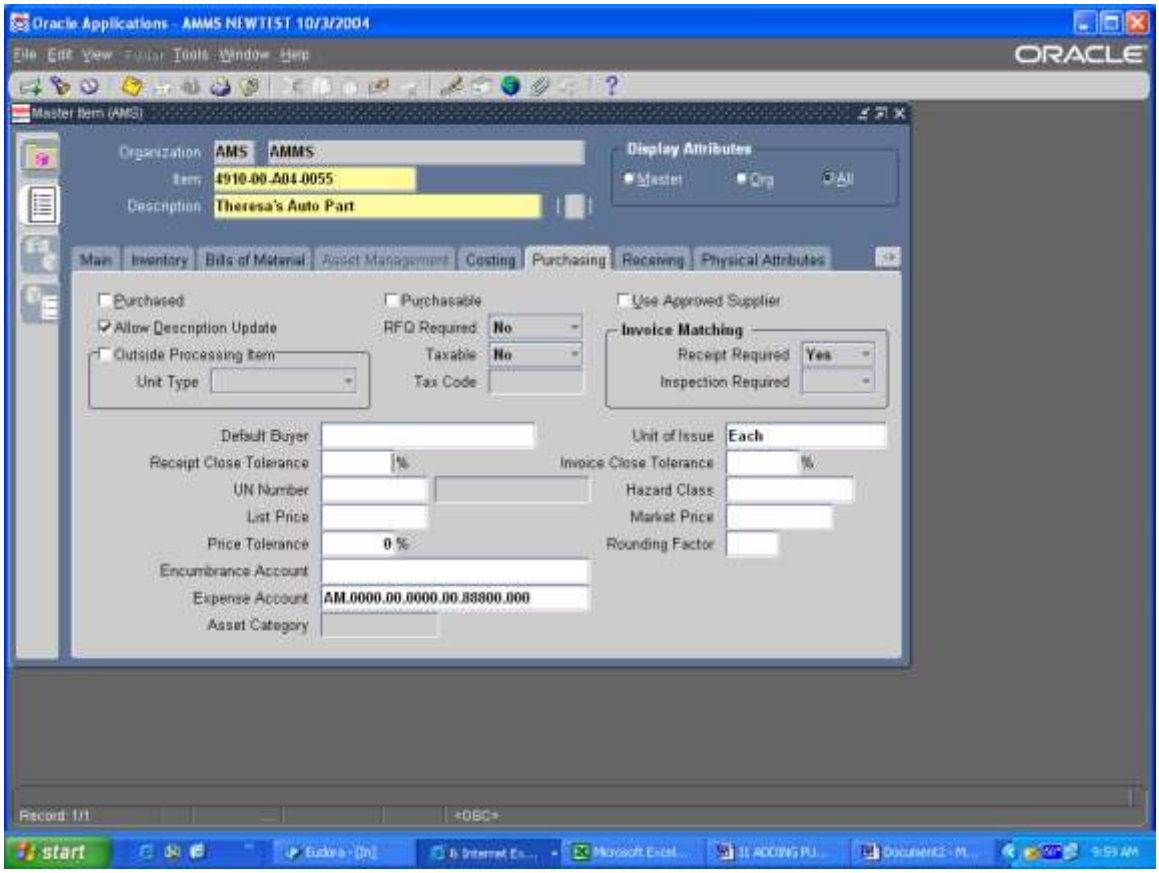
Step Description: Click on the Primary Unit of Measure field and change if necessary from List of Values (LOV) then Click OK Please remember to select the correct Primary UOM as to this field can never be changed.

Expected Results/Actions: U/I is updated



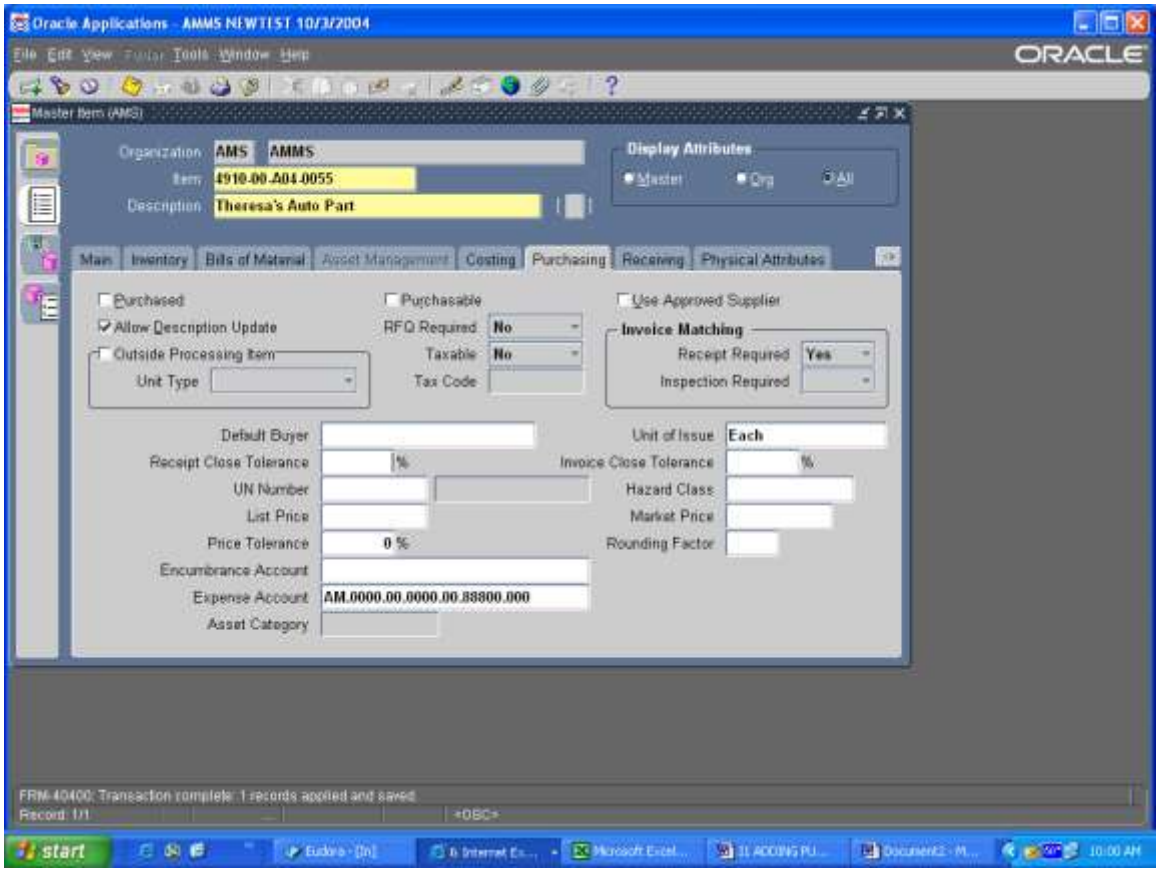
Step Description: Navigate to the Purchasing Tab and select the Unit of Issue from the LOV; this should match the Primary UOM.

Expected Results/Actions: Purchasing Unit of Measure is changed



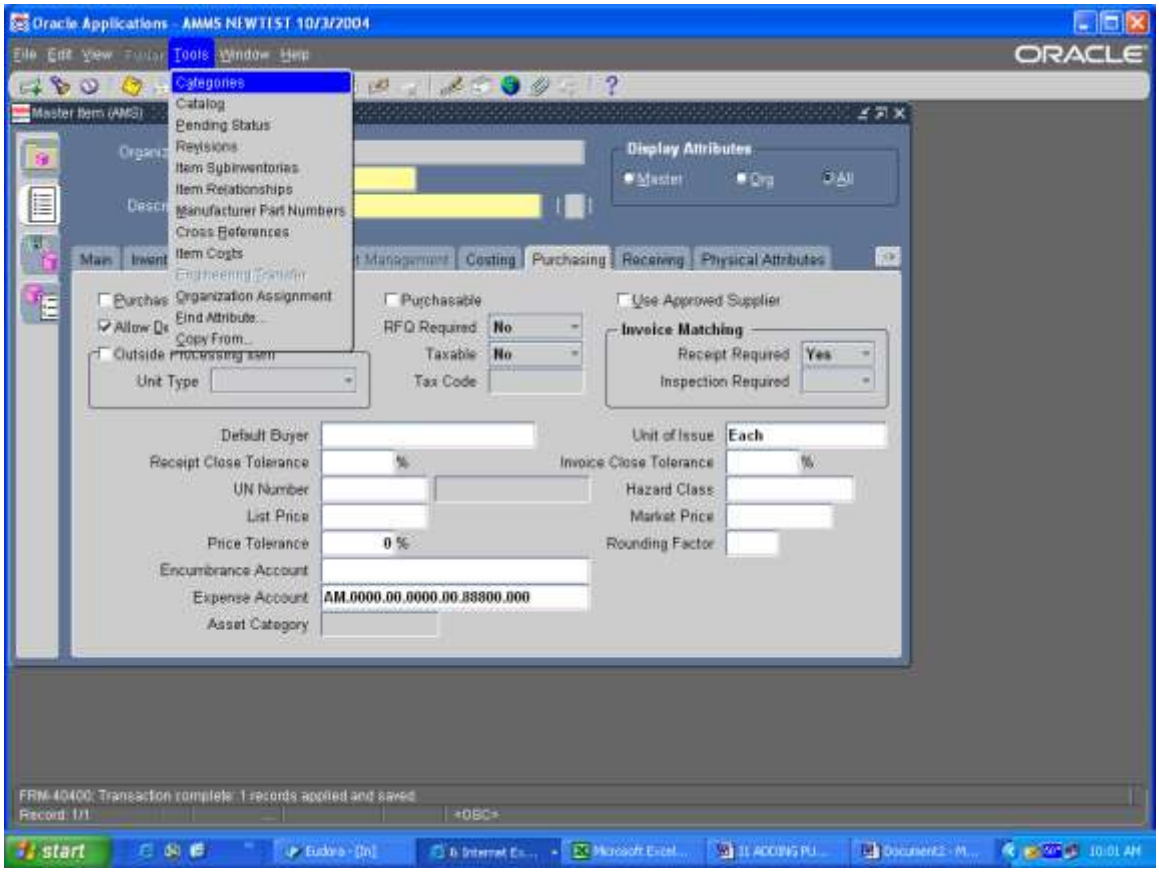
Step Description: Save Information Entered

Expected Results/Actions: Transaction Complete Message at the bottom of the form.



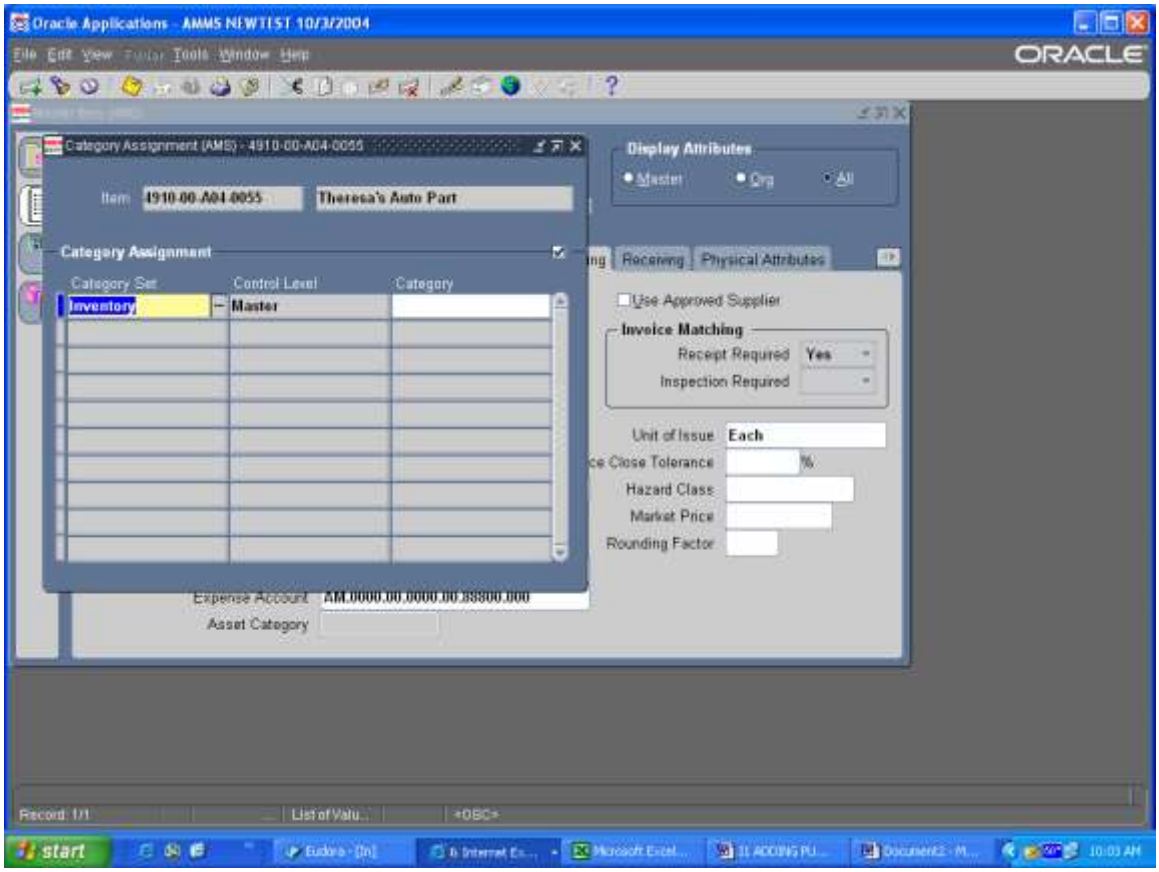
Step Description: Navigate to “Tools” and choose “Categories

Expected Results: Category form opens.



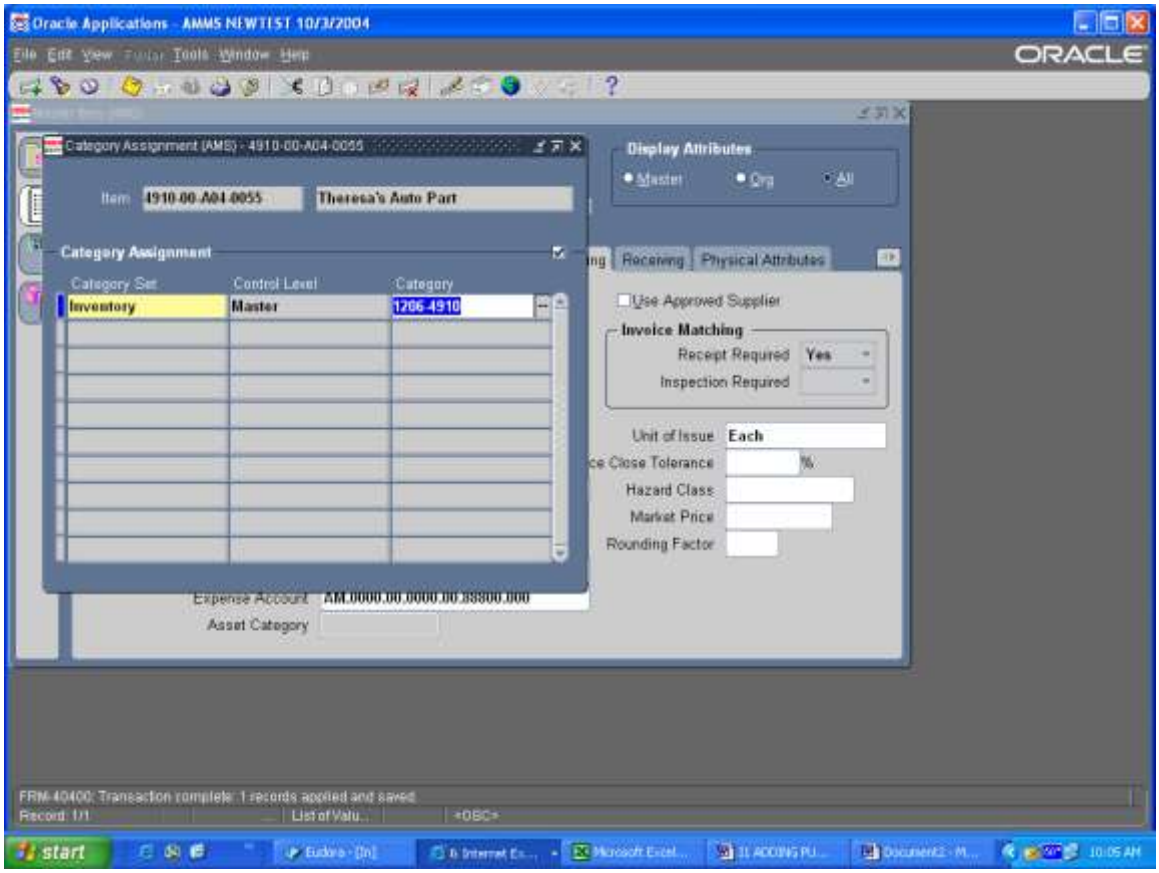
Step Description: At the Category Set field click on the LOV and choose “Inventory”

Expected Results/Actions: Field is populated.



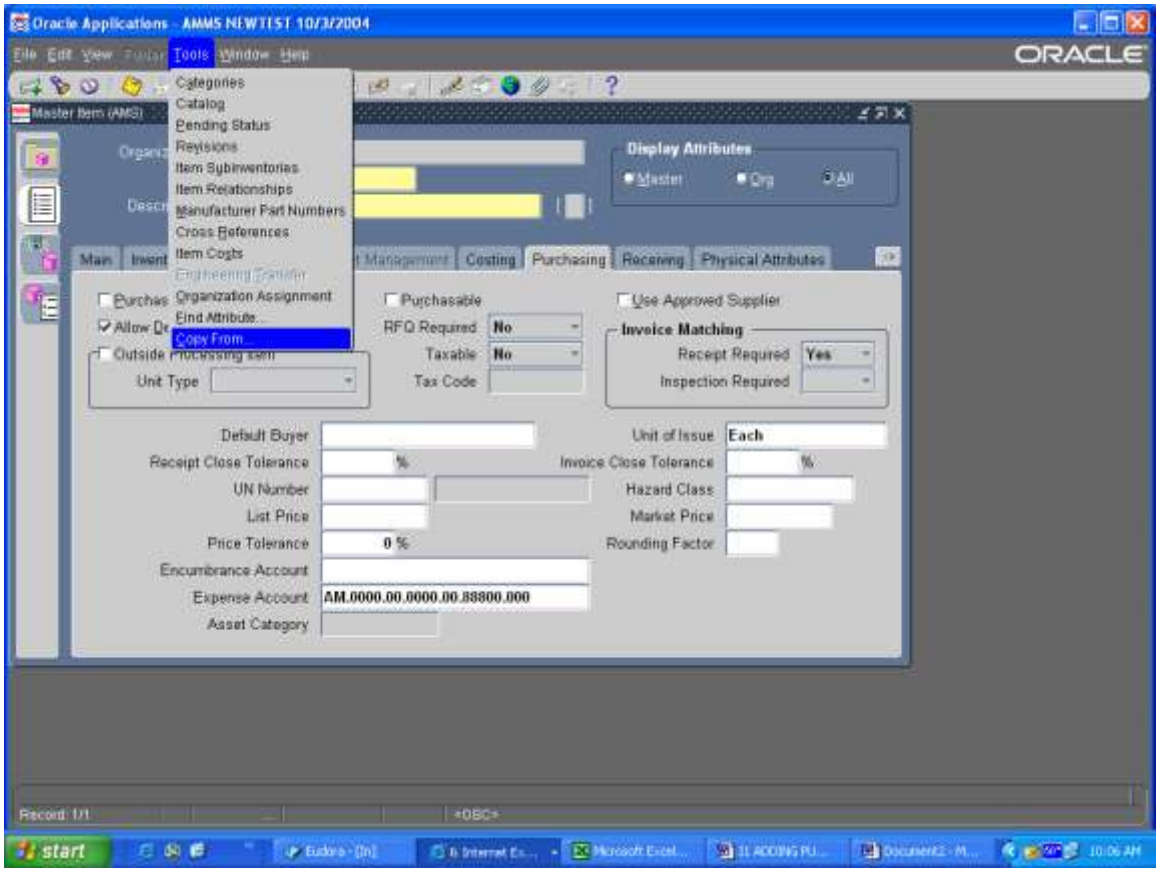
Step Description: Tab to Category and Enter the Correct Category (NIAC) for that new item number, SAVE and CLOSE form.

Expected Results/Actions: Transaction Complete Message at the bottom of the form.



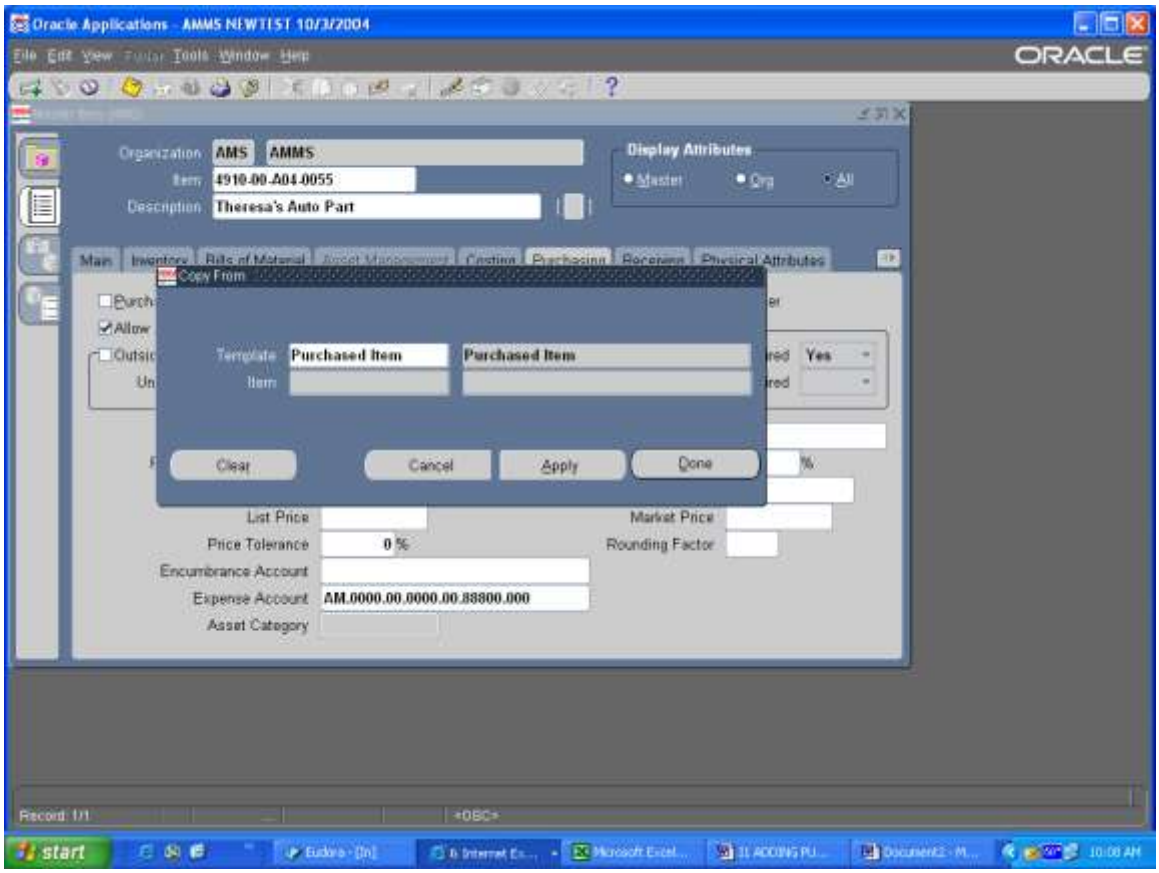
Step Description: Navigate to “Tools” and choose “Copy From”

Expected Results/Actions: Copy From form opens



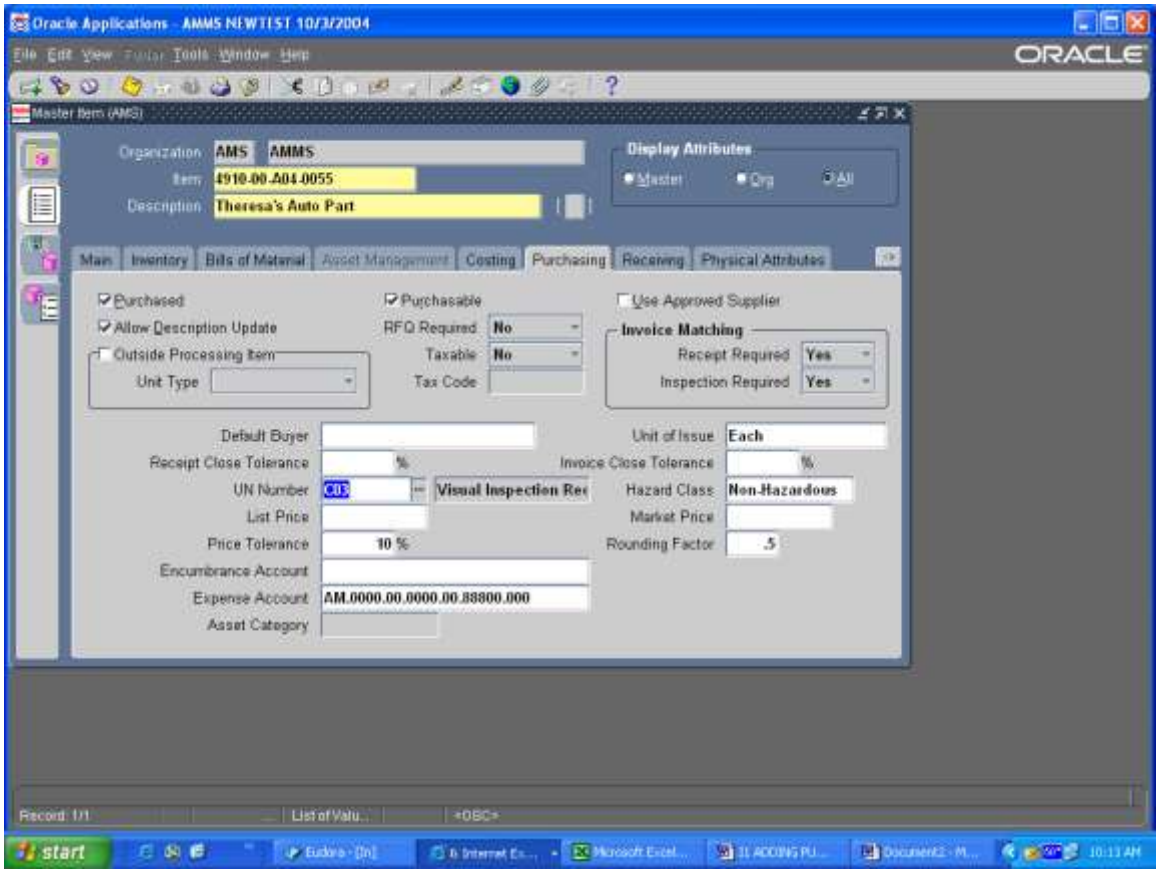
Step Description: Click on the LOV and select “Furniture Expense” to copy an Item Template. Click “Apply” then click “Done”

Expected Results/Actions: Transaction Saved Message will appear



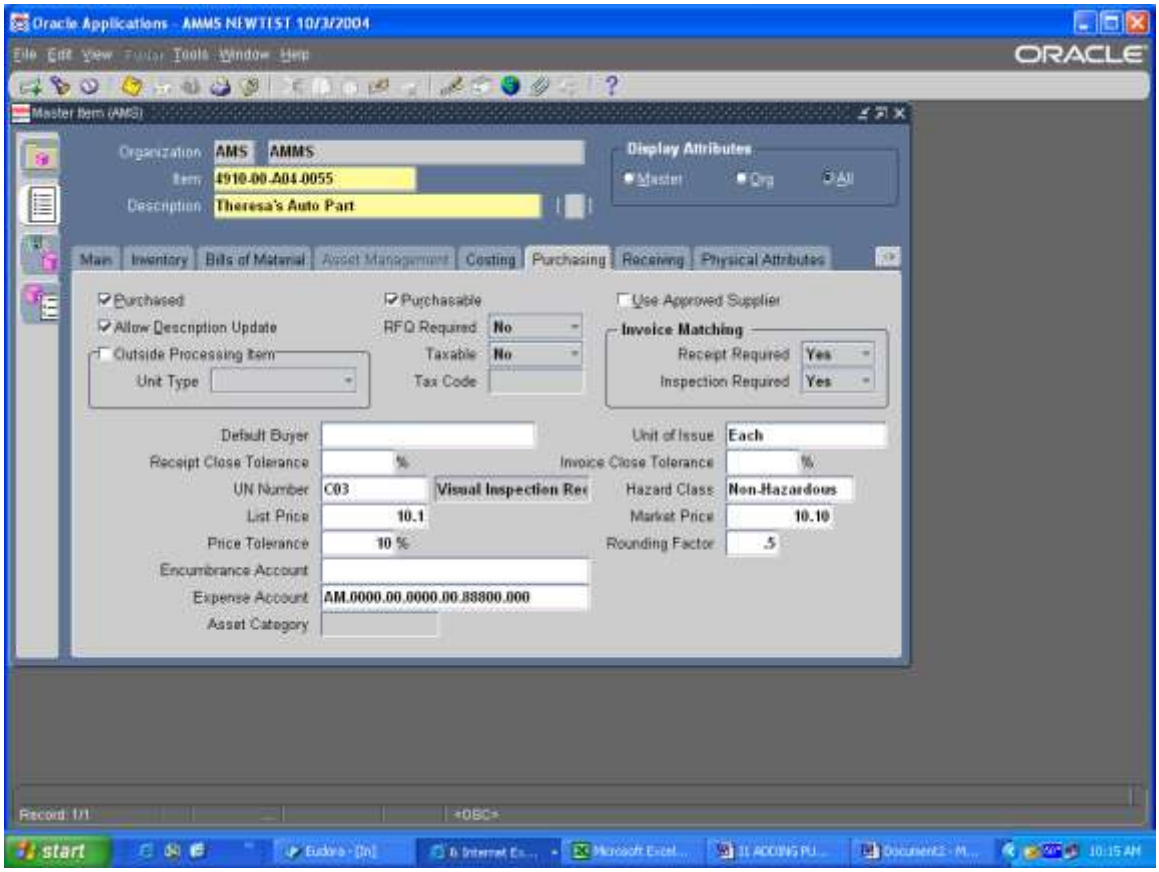
Step Description: Navigate to the “Purchasing” Tab and verify the UN code it will default to CO3 if different change UN code.

Expected Results/Actions: Field is populated.



Step Description: “Purchasing” Tab enter the “List and Market Price” of the item

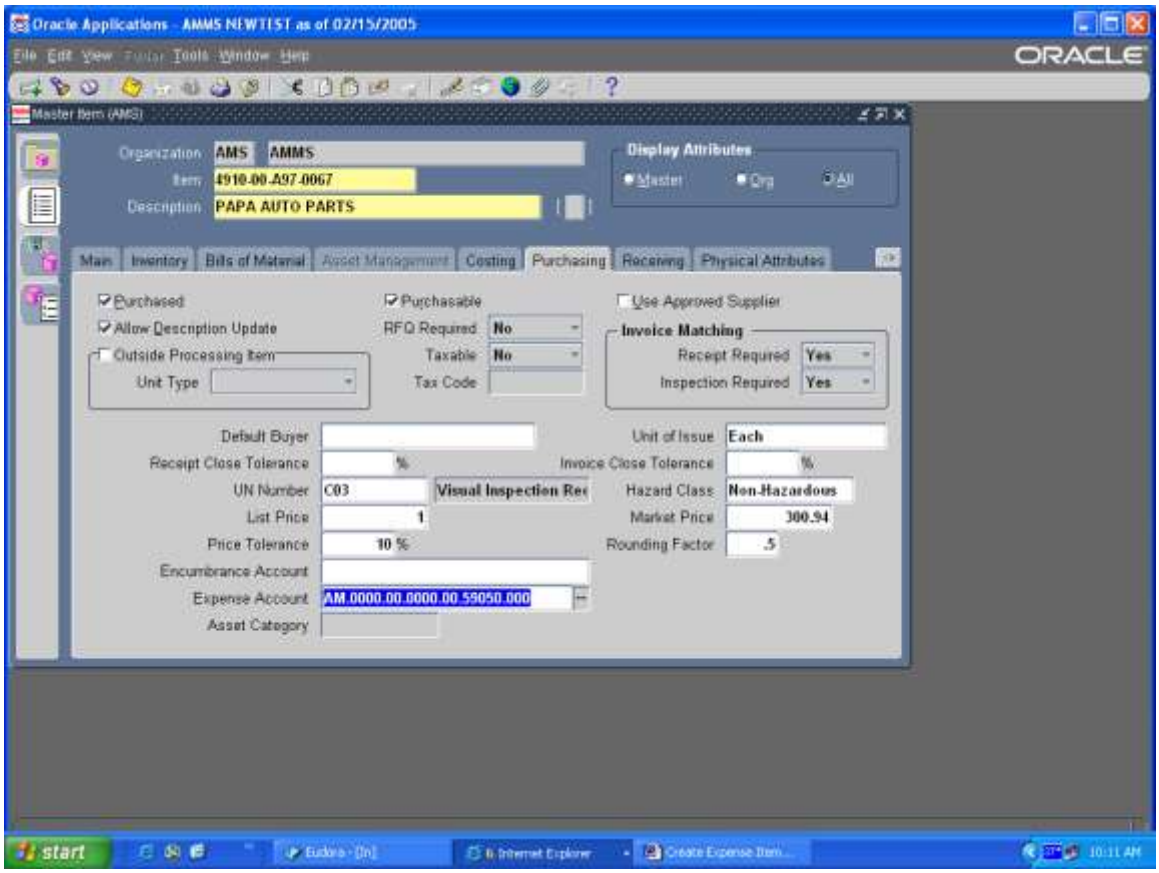
Expected Results/Actions: Field is populated



Step Description: At the Purchasing Tab in the Expense Account Field, change the GL number to:

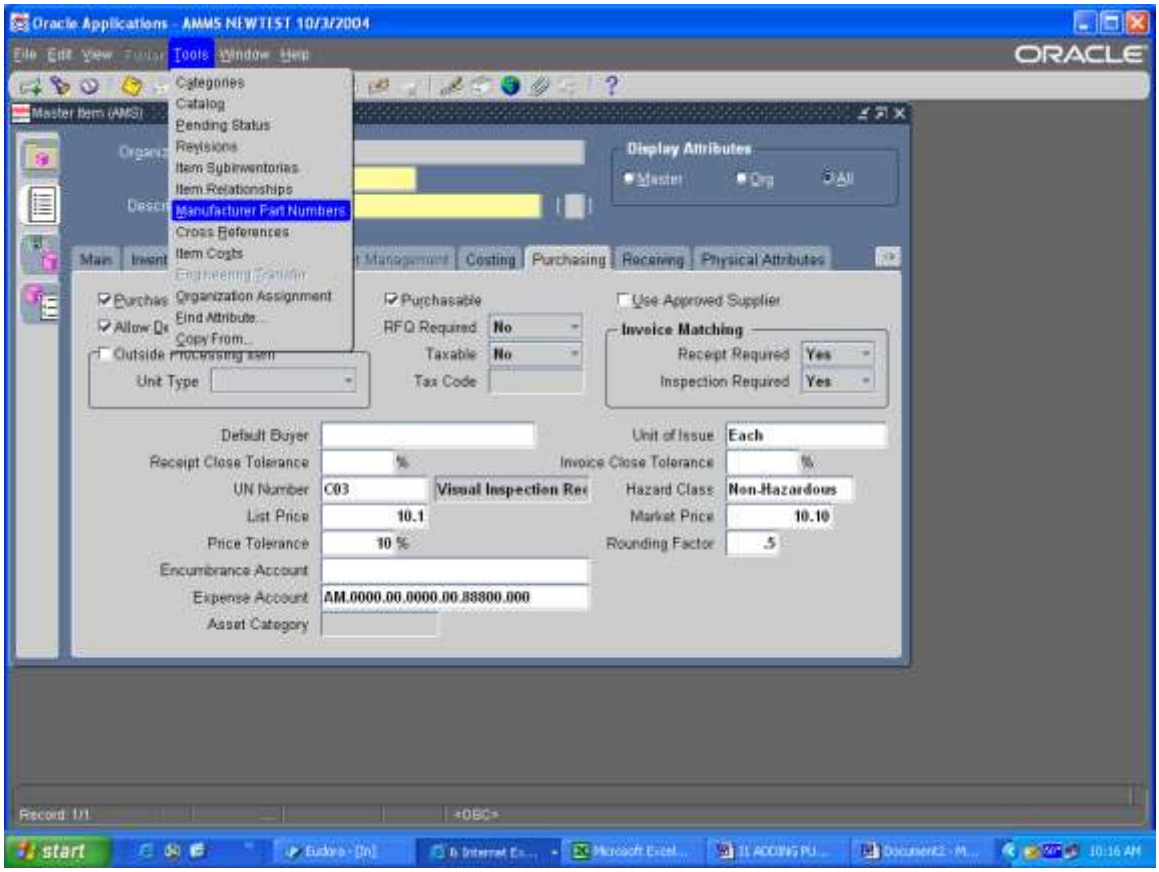
AM.0000.00.0000.00.59070.000 – for Furniture Expense Items

Expected Results: Account Number will change



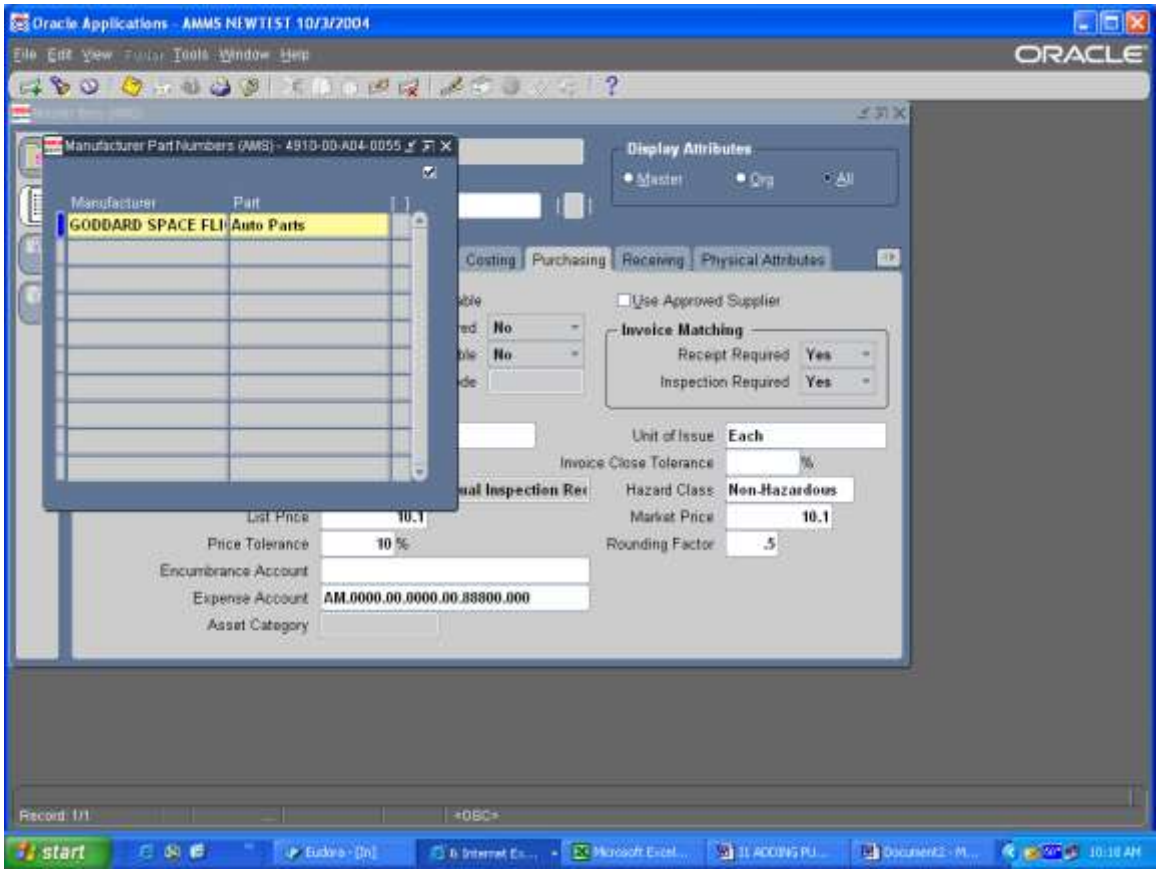
Step Description: Navigate to “Tools” and choose “Manufacturer Part Number”

Expected Results/Actions: Manufacturer Form is opened



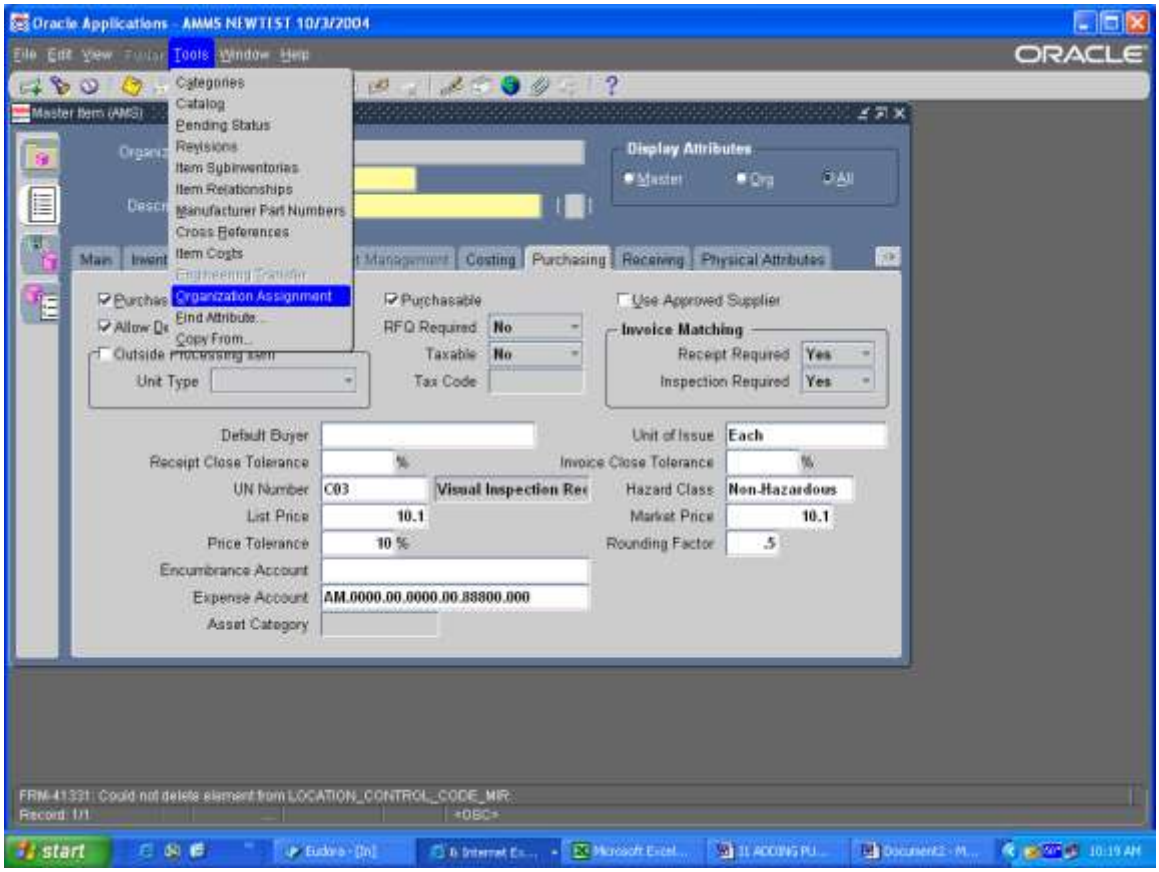
Step Description: Choose the Manufacture from the LOV and enter the part number. Click on “Save” then close the form.

Expected Results/Actions: Manufacture information is populated



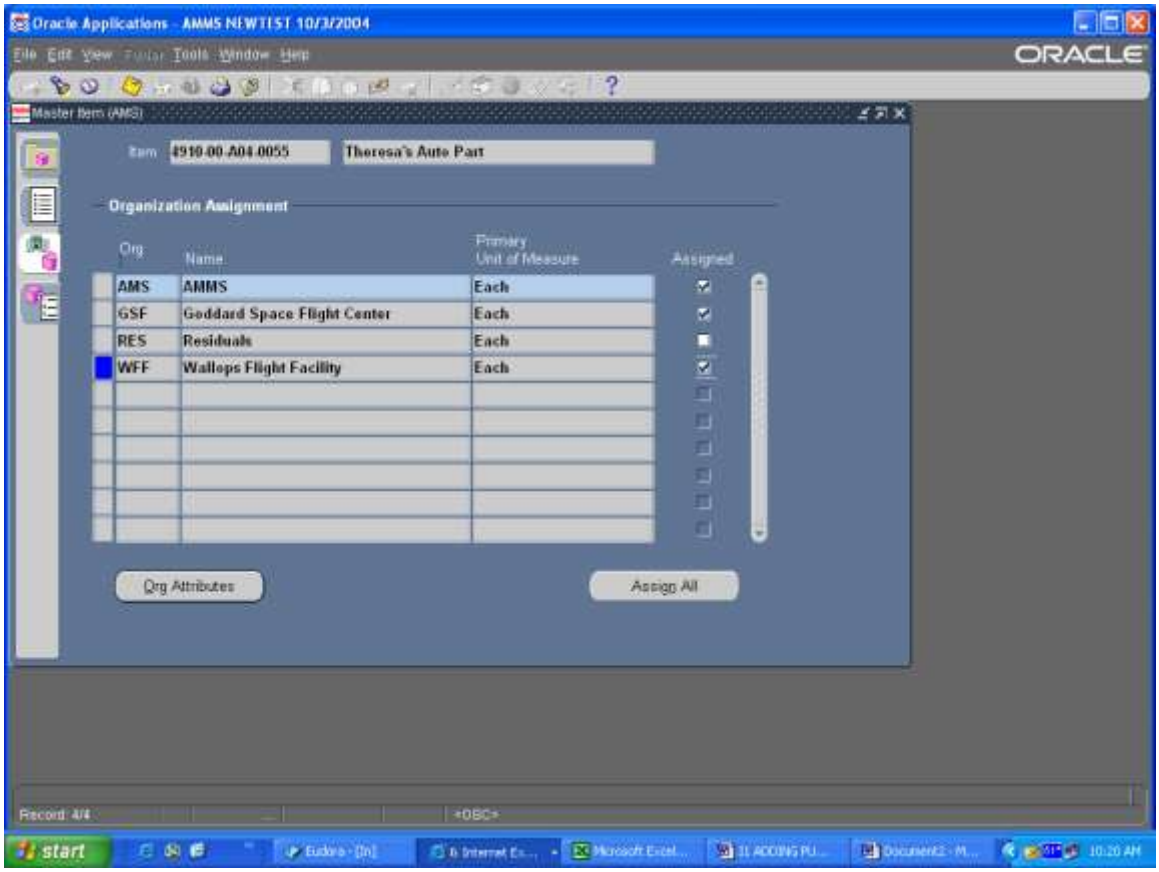
Step Description: Navigate to “Tools” and choose “Organization Assignment”

Expected Results/Actions: Organization Assignment form is opened.



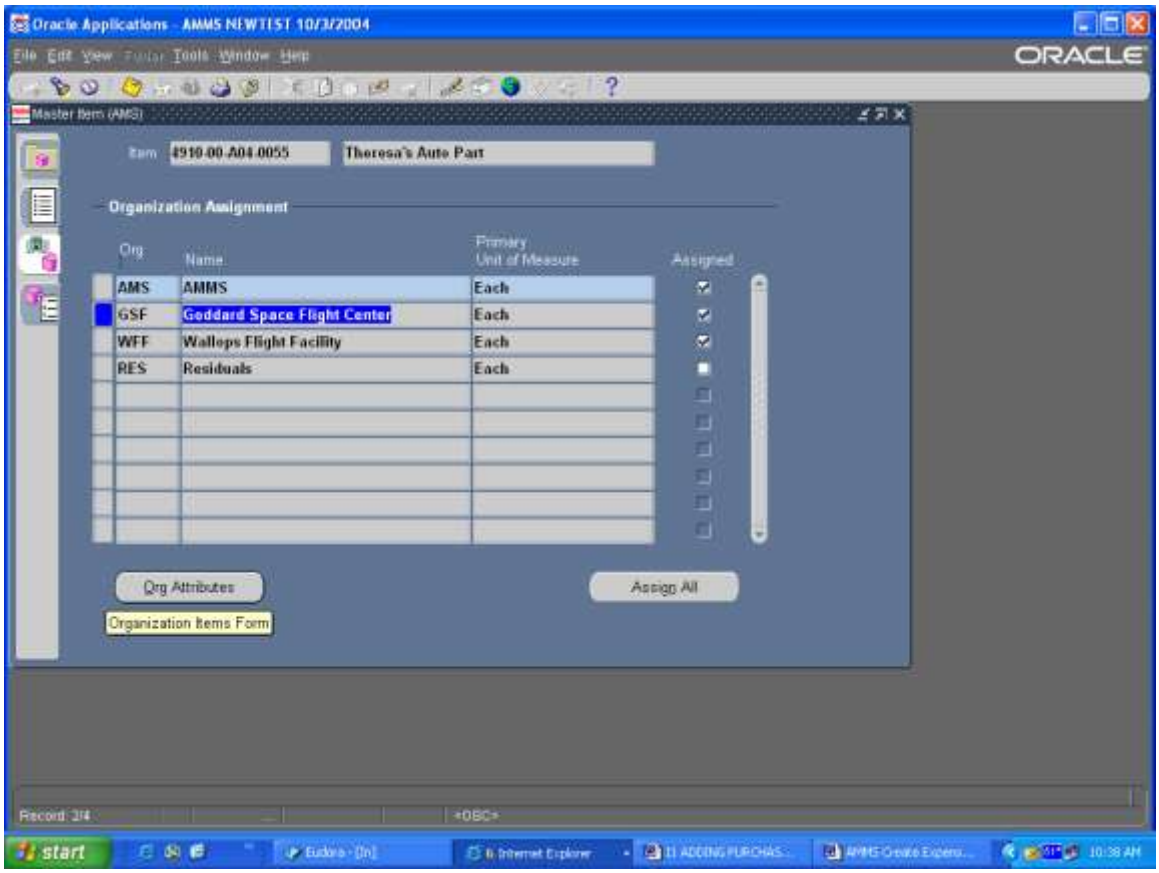
Step Description : Click on the white box next to GSF and WFF

Expected Results/Actions: All GSF and WFF have check marks next to them.



Step Description: From the Organization Assignments screen click on the GSF and then click on the Org Attributes button at the bottom of the screen

Expected Results/Actions: Organization Item window appears



Step Description: At the Organization level navigate to the Purchasing Tab and update the Expense Account number with the appropriate GL #:

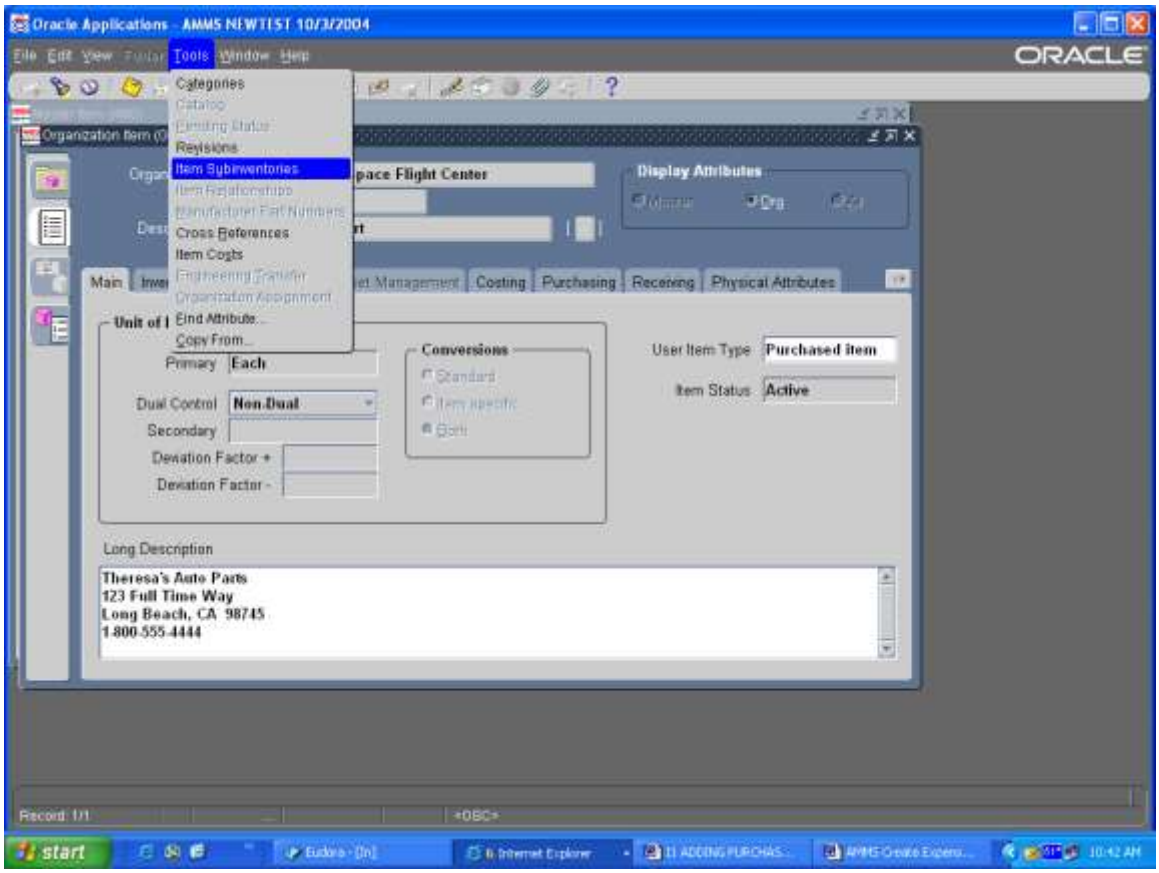
GD.0000.00.0000.00.59070.000 – for Furniture Expense Items

Expected Results: Account Number will change

NOTE:
The Expense Account Number will need to be changed at both the GSF and the WFF Organizations.

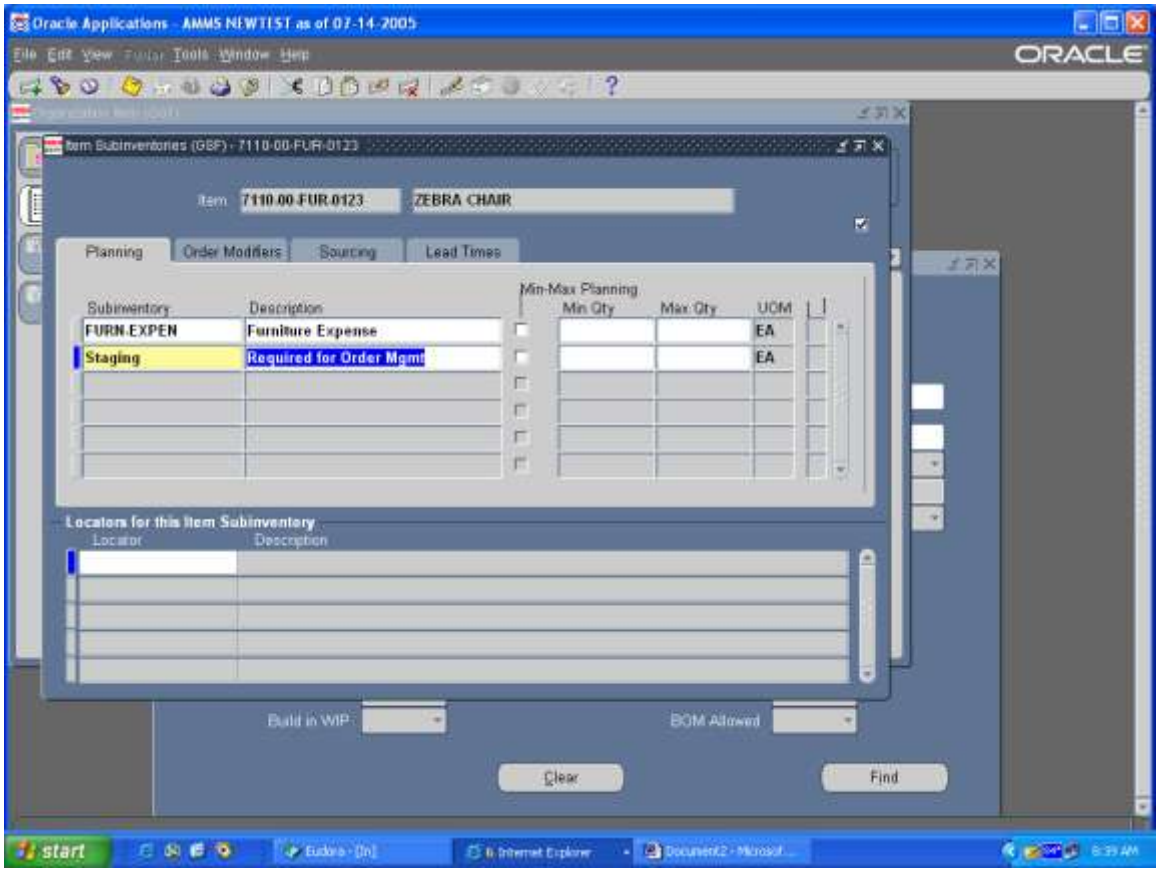
Step Description: Verify that all of the other information at the Organization Level is the same as the information you entered at the Master Level. Navigate to “Tools” and choose “Item Sub inventory”

Expected Results/Actions: Item Sub inventory Form opens



Step Description: Choose the correct sub inventory from the LOV then click “OK” For Furniture Expense items to select FURN-EXPEN sub inventory, all items MUST be assigned to the Staging sub inventory. There are no Locators required for Expense items.

Expected Results/Actions: Sub inventory Information is Populated



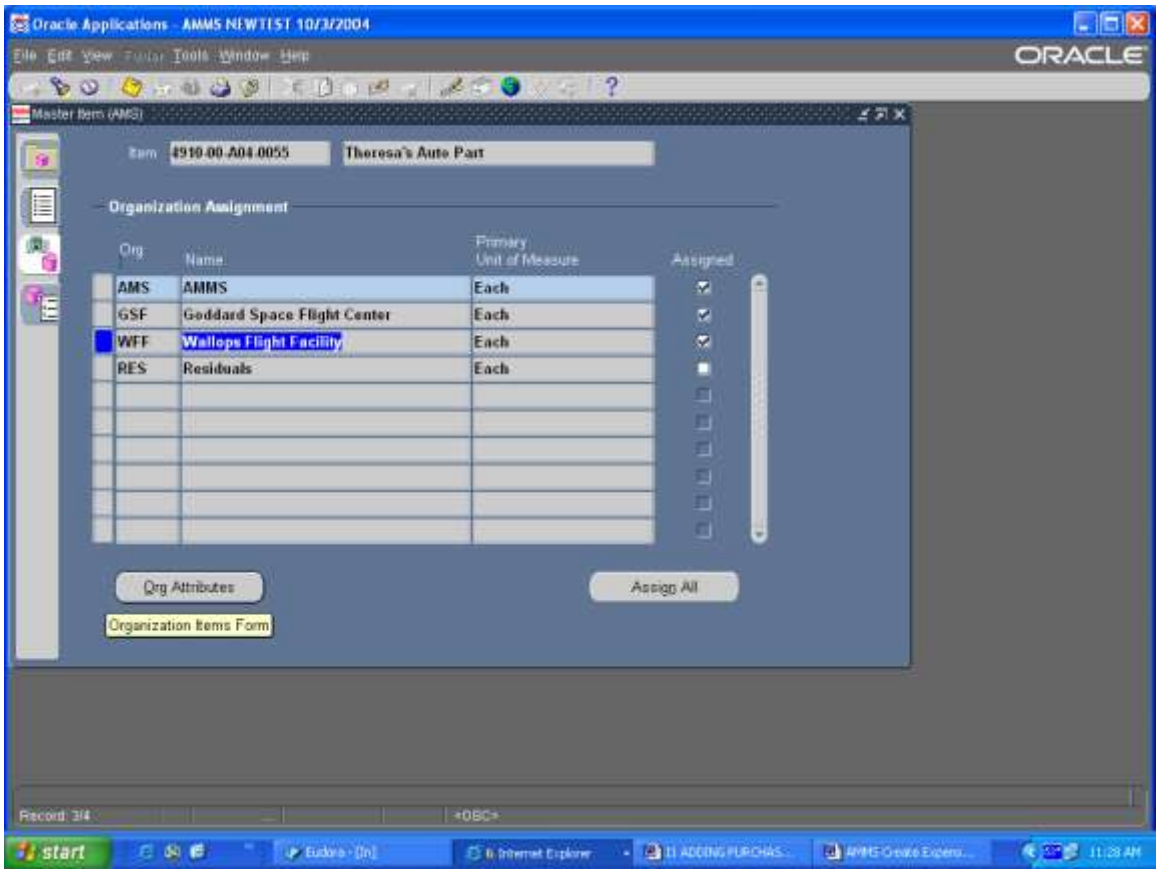
Step Description: Click on “Save” and close form

Expected Results/Actions: Transaction Complete Message.

Note: You need to add sub inventories to both Organizations GSF and WFF.

Step Description: Click the GSF Organization Item screen and select the WFF Wallops Organization assignment click on the Organization Attributes button at the bottom of the screen

Expected Results: The Wallops Organization Item window will appear.



Step Description: Verify all data is the same as the Master Item Record and add the appropriate sub inventories following the same steps for the GSF Organization.

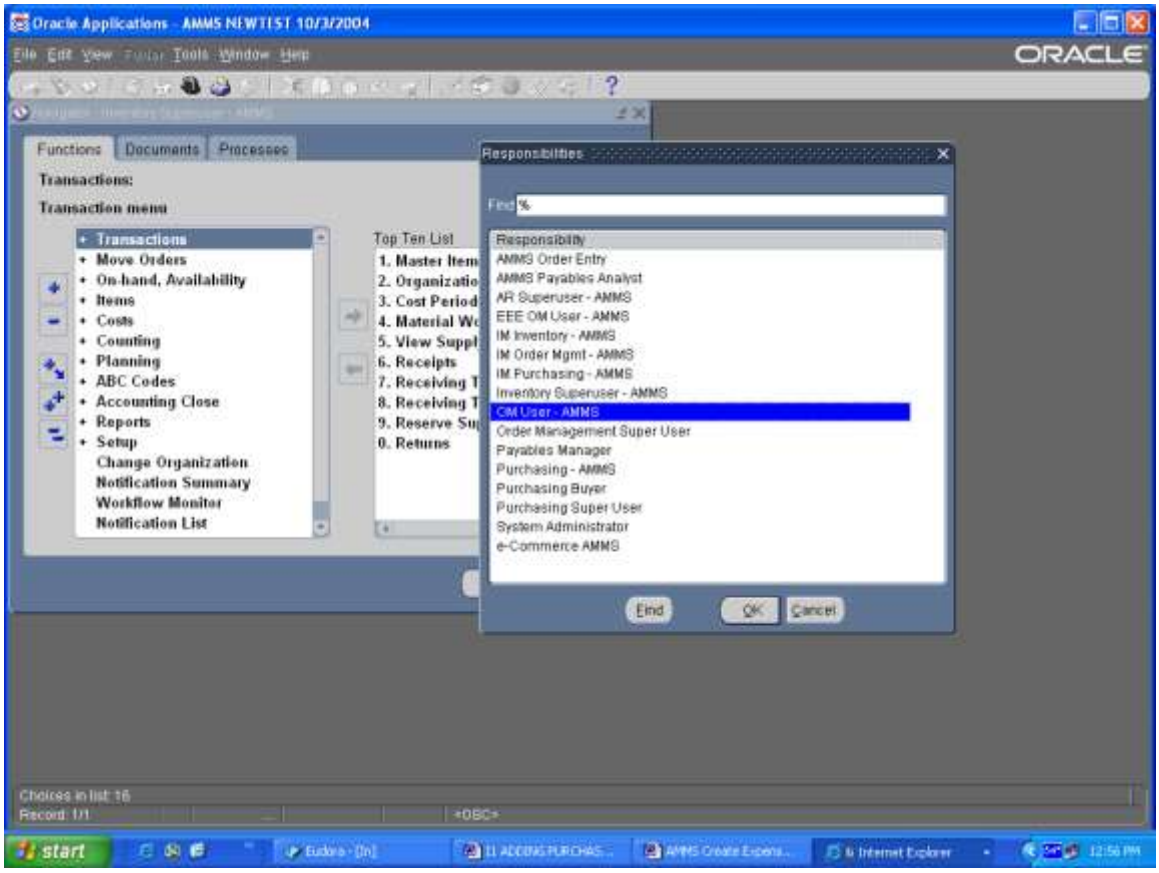
Expected Results/Actions: Sub inventories will be assigned.

Step Description: Save your work and close all forms.

Expected Results/Actions: Will be back at the IM Inventory AMM Menu

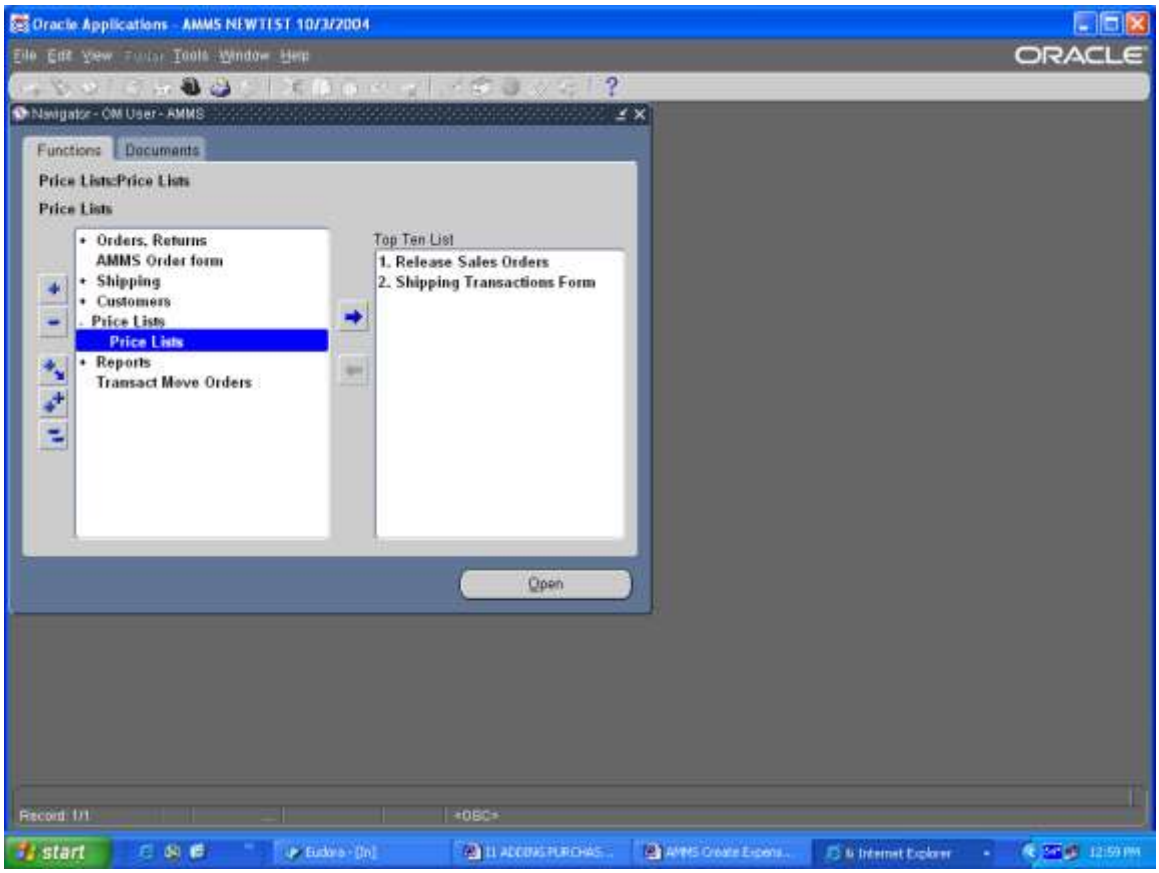
Step Description: Change responsibilities to the OM USER Responsibility

Expected Results/Actions: The OM USER main menu will appear



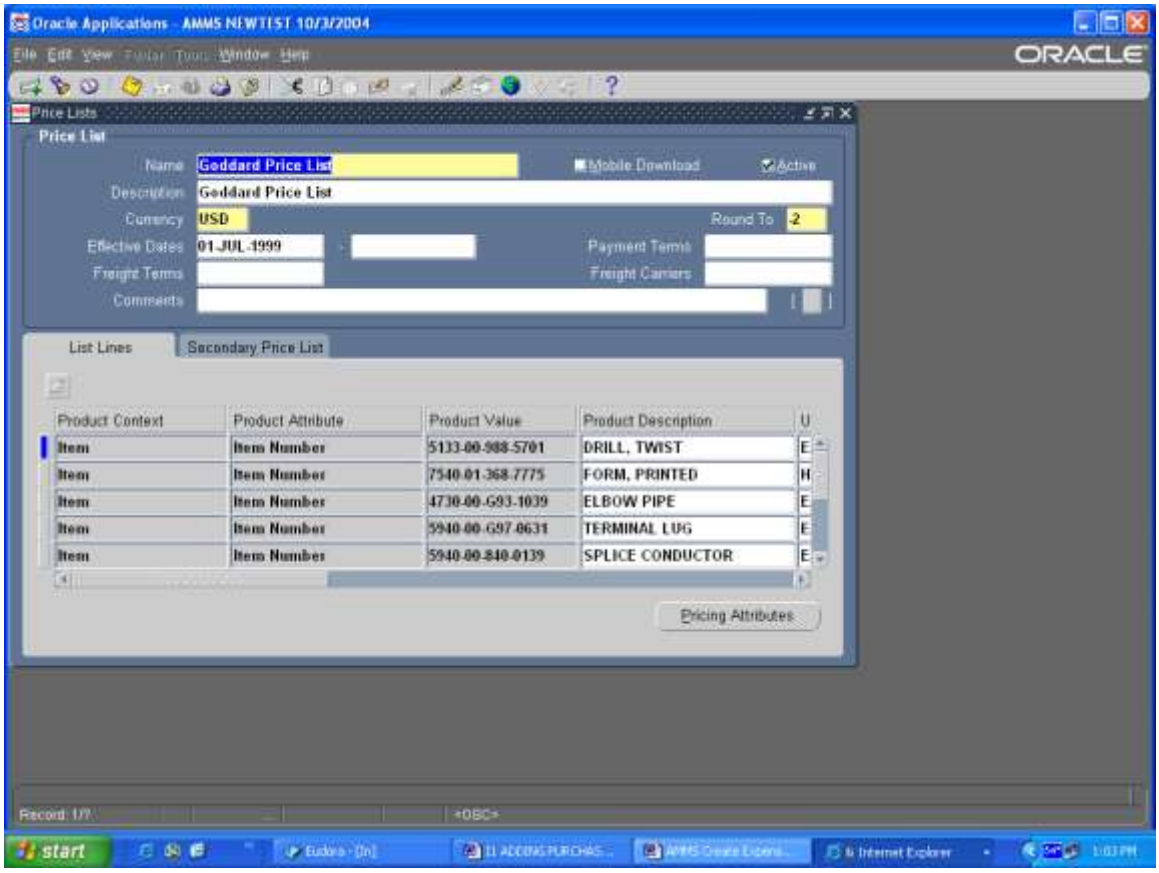
Step Description: Select Price Lists> Price List from the menu and click on open

Expected Results/Actions: A blank Price List screen will appear



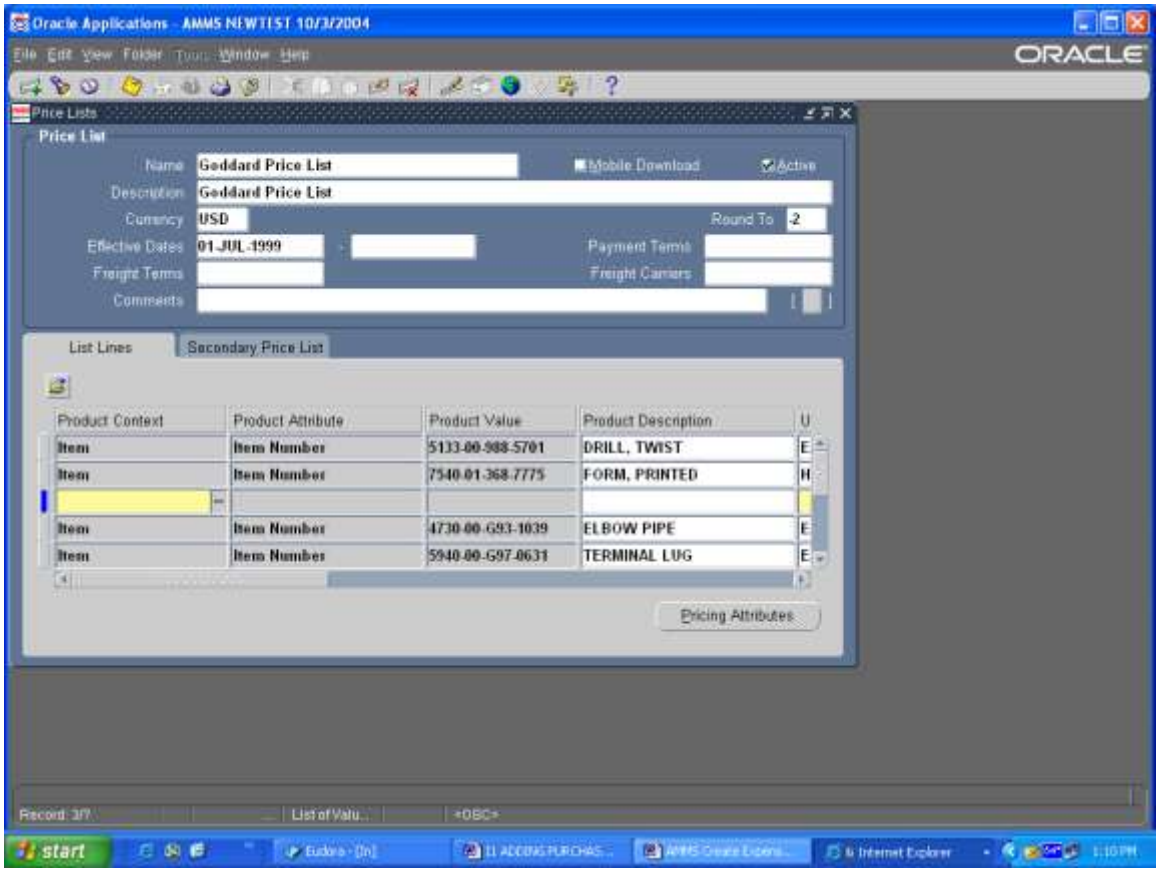
Step Description: On your keyboard hit the F11 button to send Oracle into query mode, then hold down the Ctrl button and hit F11 again to initiate the query.

Expected Results/Actions: The Goddard Price List will appear



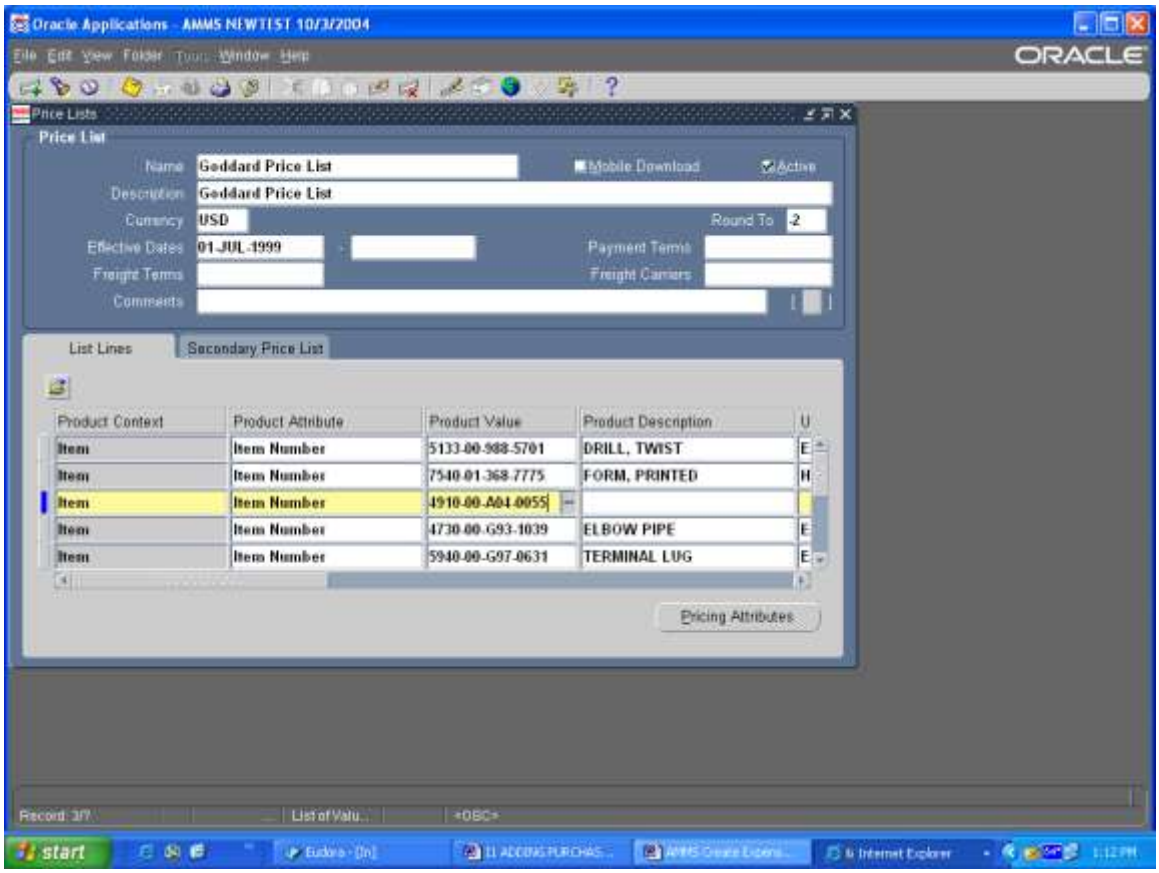
Step Description: At the bottom of the Goddard Price List, in the List Line section, click on an occupied line then click on the green plus sign (+) on the tool bar to add a new line, make sure you are at the bottom of the screen.

Expected Results/Actions: A blank line will appear and the Item field will be yellow



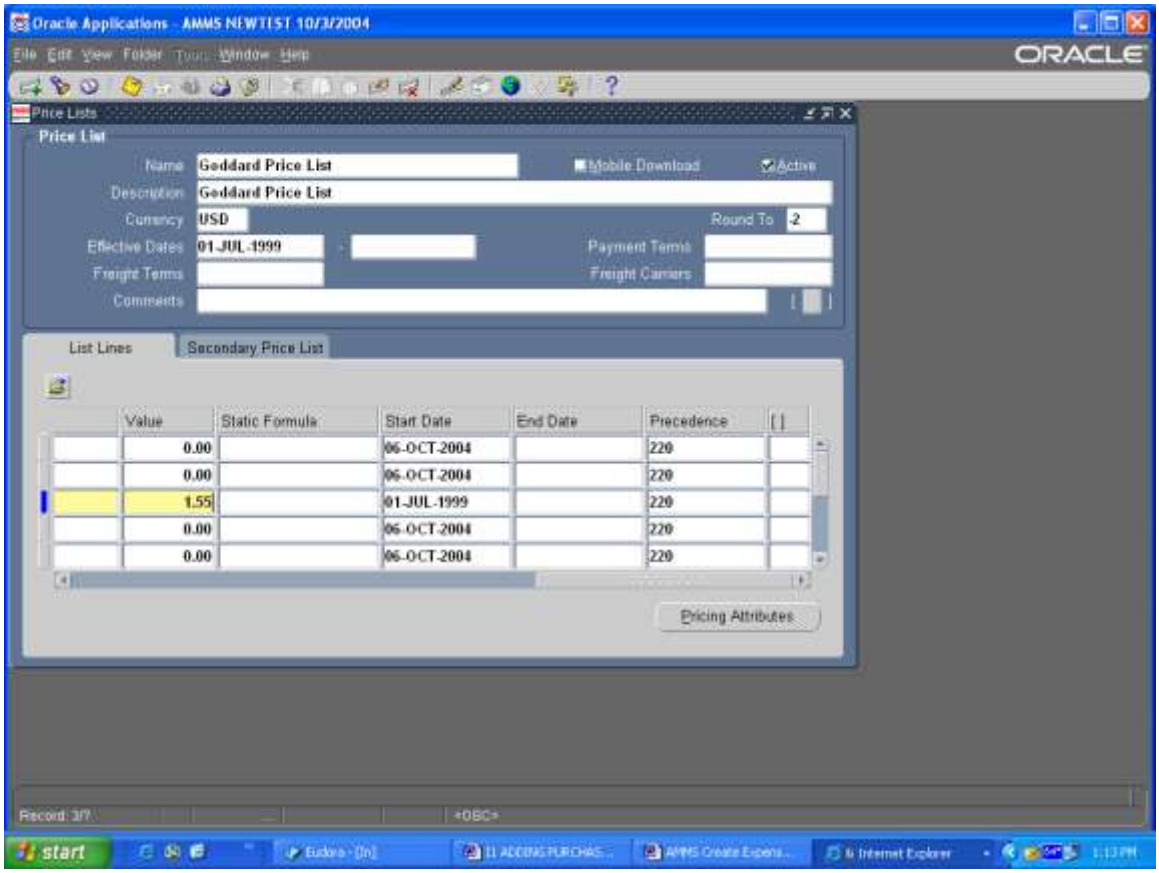
Step Description: In the Item field click on the LOV and select Item from the list, tab to the Product Attribute field and click on the LOV and select Item Number from the list. In the Product Value field enter the Item number you just loaded.

Expected Results/ Actions: All fields will be populated



Step Description: Tab over to the value field and enter the cost for the item. Example: 1.55

Expected Results/ Actions: Field will be populated with cost.



Step Description: Save your work and close all forms, Repeat the same process for the Wallops Price List.

Expected Results/Actions: Transactions Complete and Applies message at the bottom of screen, and will return to OM USER main menu.

This stock number is now loaded and on the Price List.

Notes: Expense item are not Inventory items, they can not be transacted against like other item numbers.

All Expense items must be added to both Price Lists. The sales order can not be created until the items are on the price lists.

AMMS TRAINING SCRIPT

ADDING A NEW ITEM WITH DIRECT RECEIPT TO ORACLE

Purpose

The purpose of this training script is to demonstrate how a Material Coordinators and Supply Technician Lead will add a new stock number, and set it up for Direct Receipt, to the Oracle data base. After the item has been added to the system you also have to add it to BOTH Mater Price Lists (GSF and WFF).

Audience

Material Coordinator and Supply Technician Leads

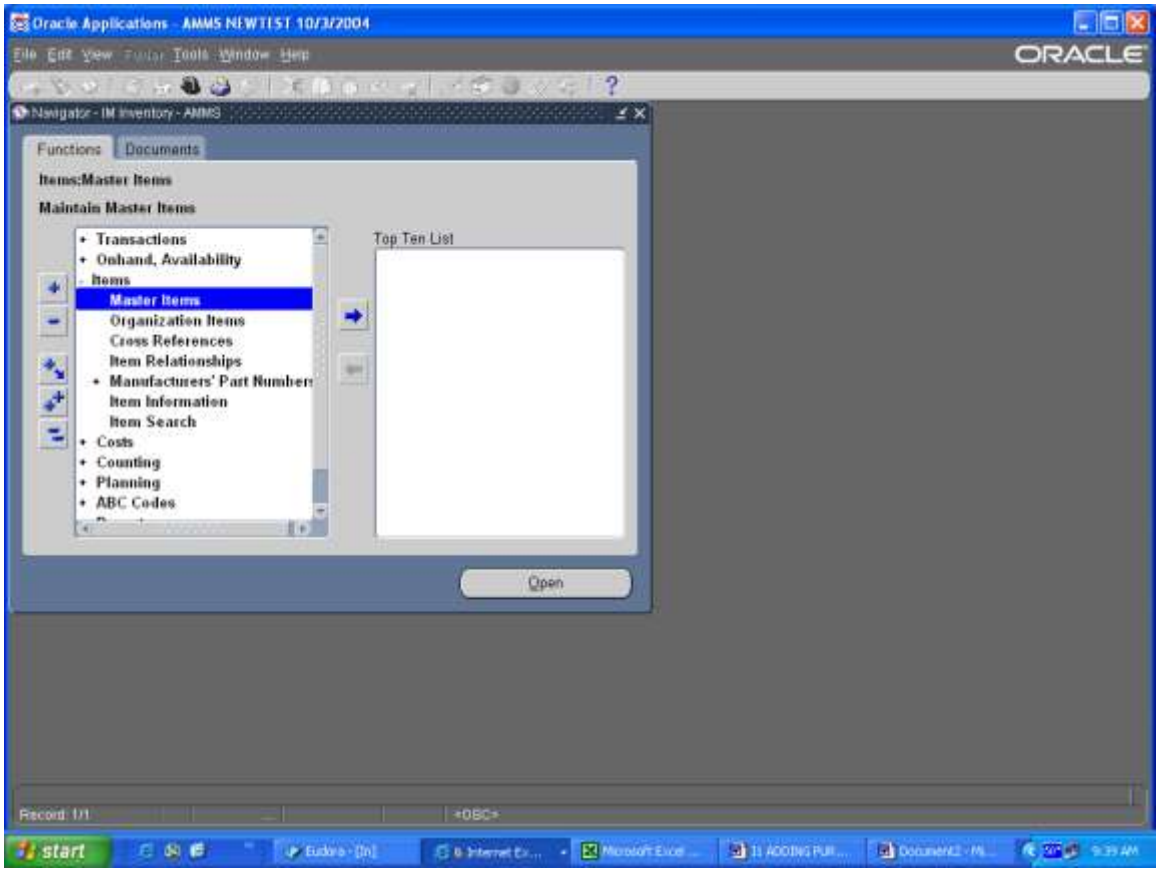
Prepared By	Theresa Coulson
Creation Date:	11/05/2004
Document Name	Create Purchased Item with Direct Receipt.doc
Version	2
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Inventory.	

Step Description: Sign on to Oracle Applications and Select User Responsibility “IM Inventory AMMS”

Expected Results/Actions: Oracle Displays the Inventory main Menu

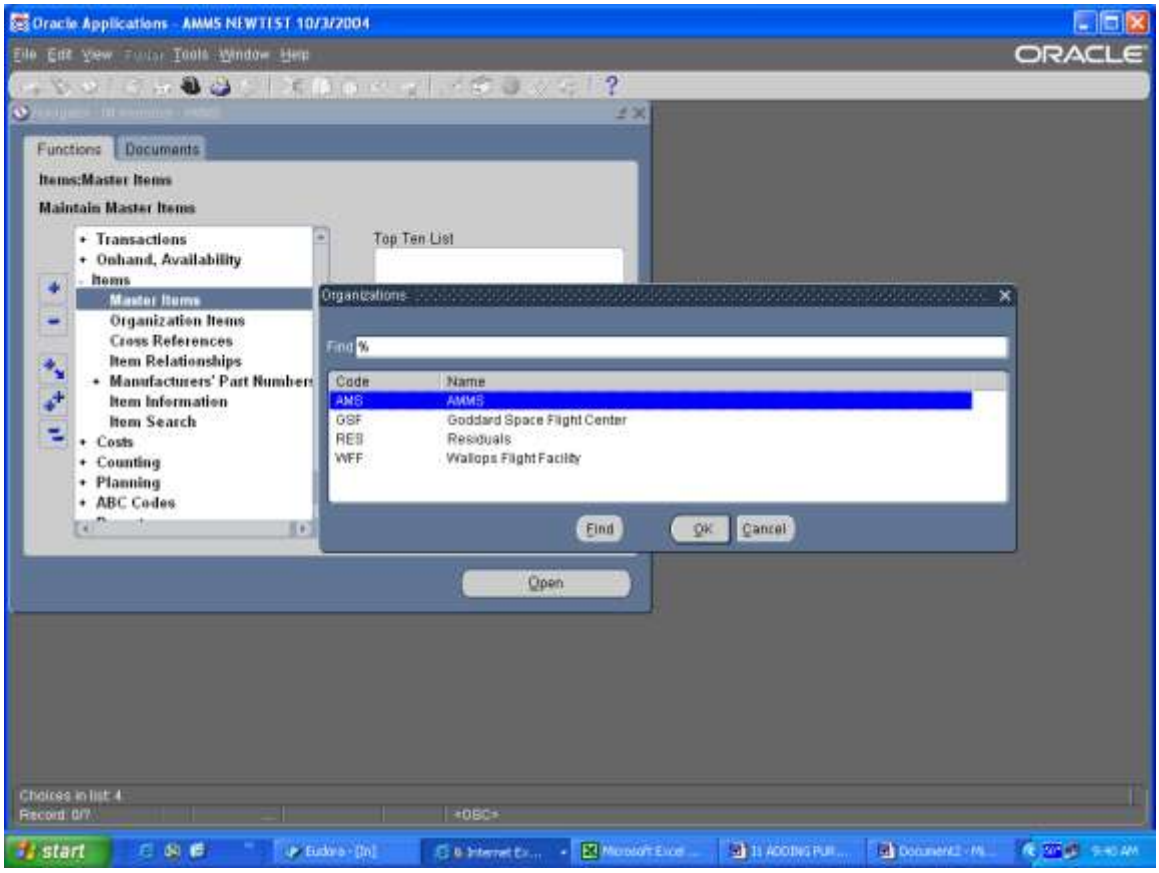
Step Description: Select “Items” then “Master Items”

Expected Results/Actions: Organization form opens.



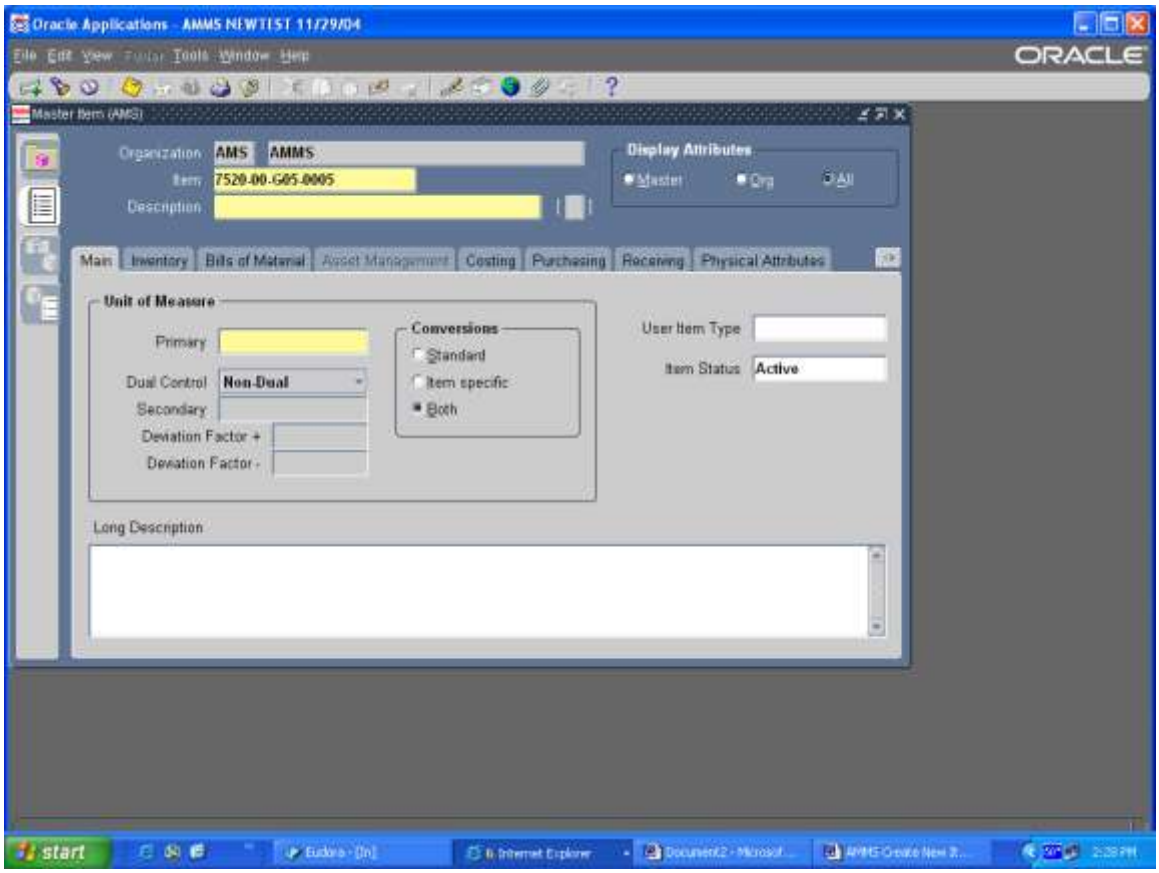
Step Description: Select “AMS” as the Organization and Click OK

Expected Results/Actions: Blank Master form opens.



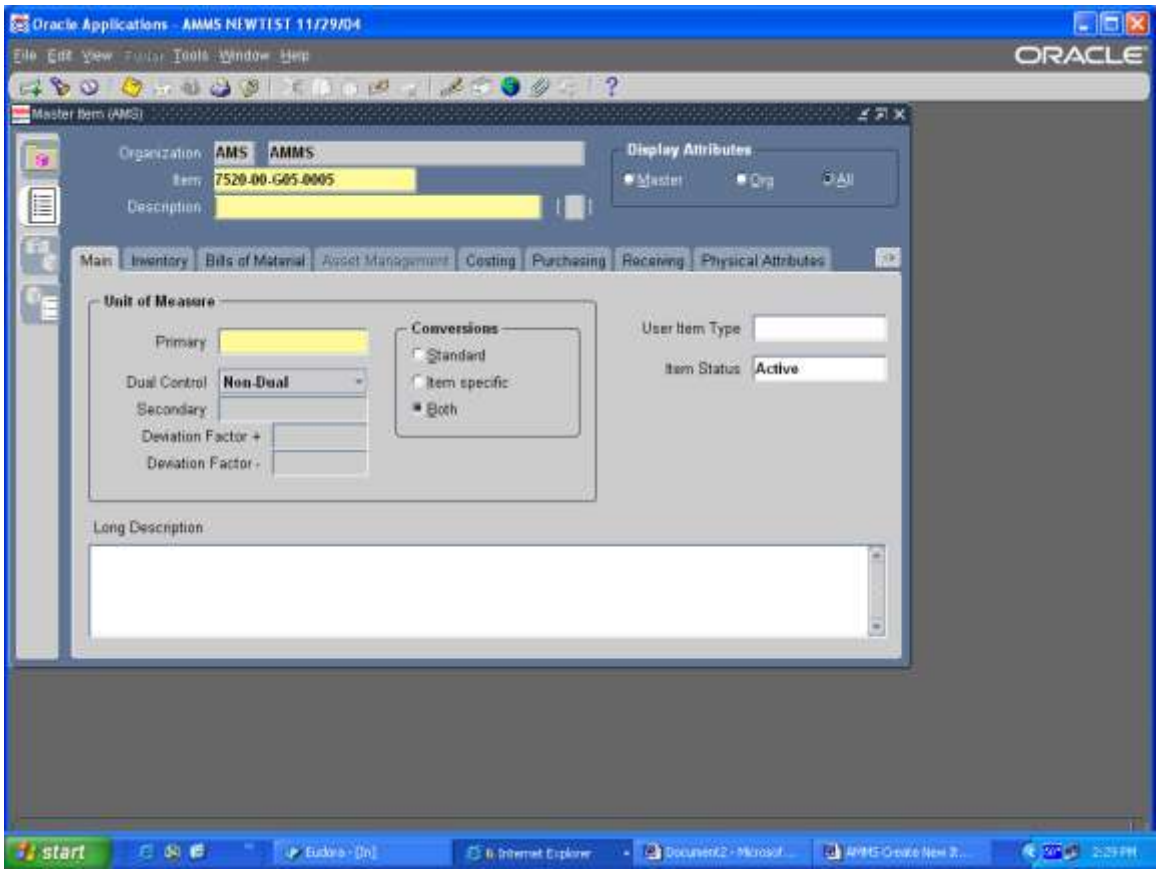
Step Description: Enter the New Item Number

Expected Results/Actions: Field is Populated.



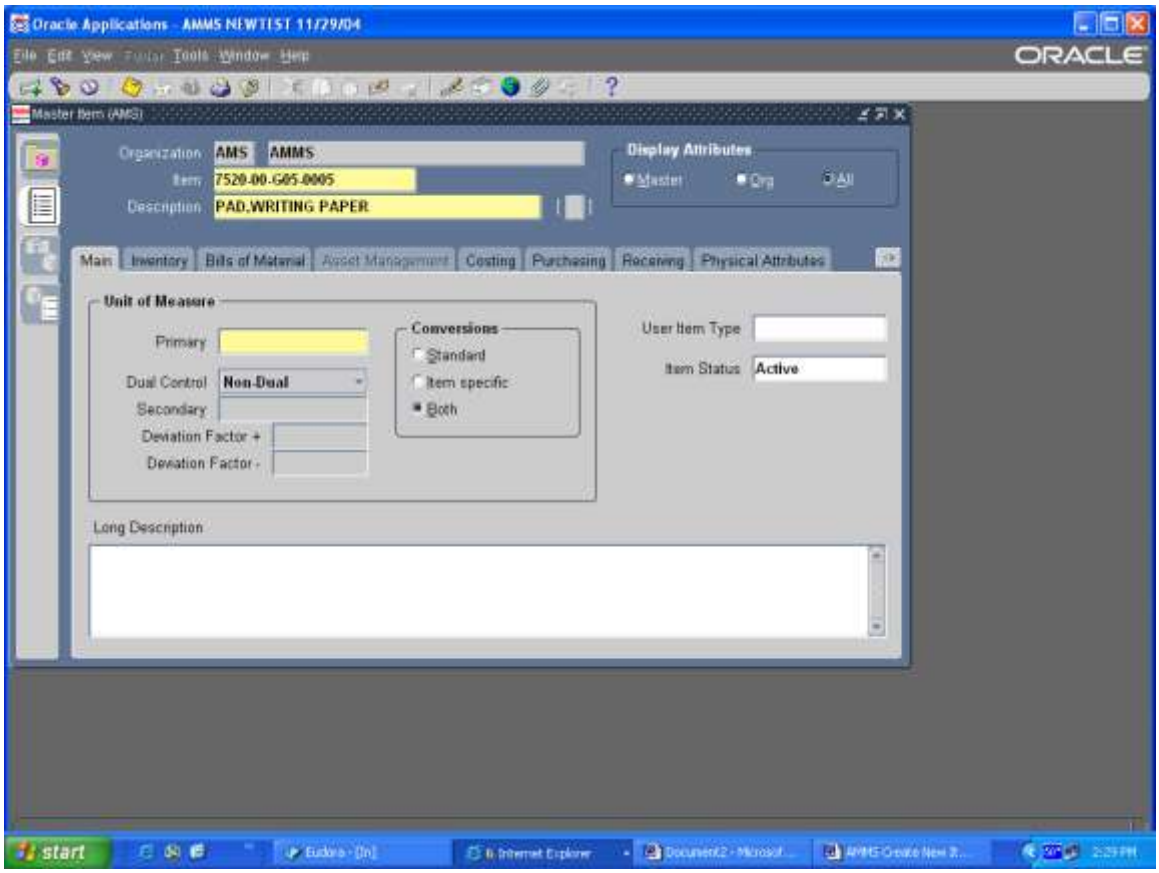
Step Description: Click on the Description Field

Expected Results/Actions: Cursor moves.



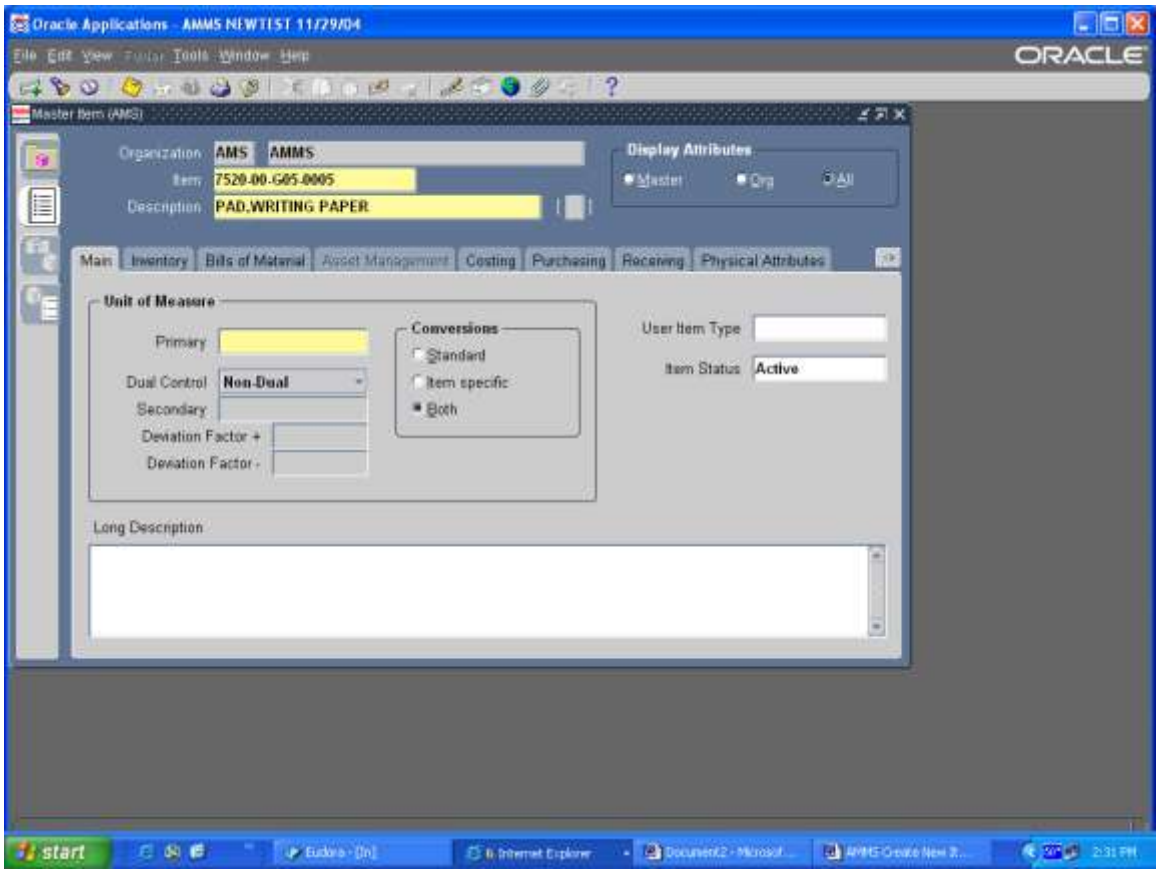
Step Description: Enter an Abbreviated Description (noun) for the item

Expected Results/Actions: Field is Populated.



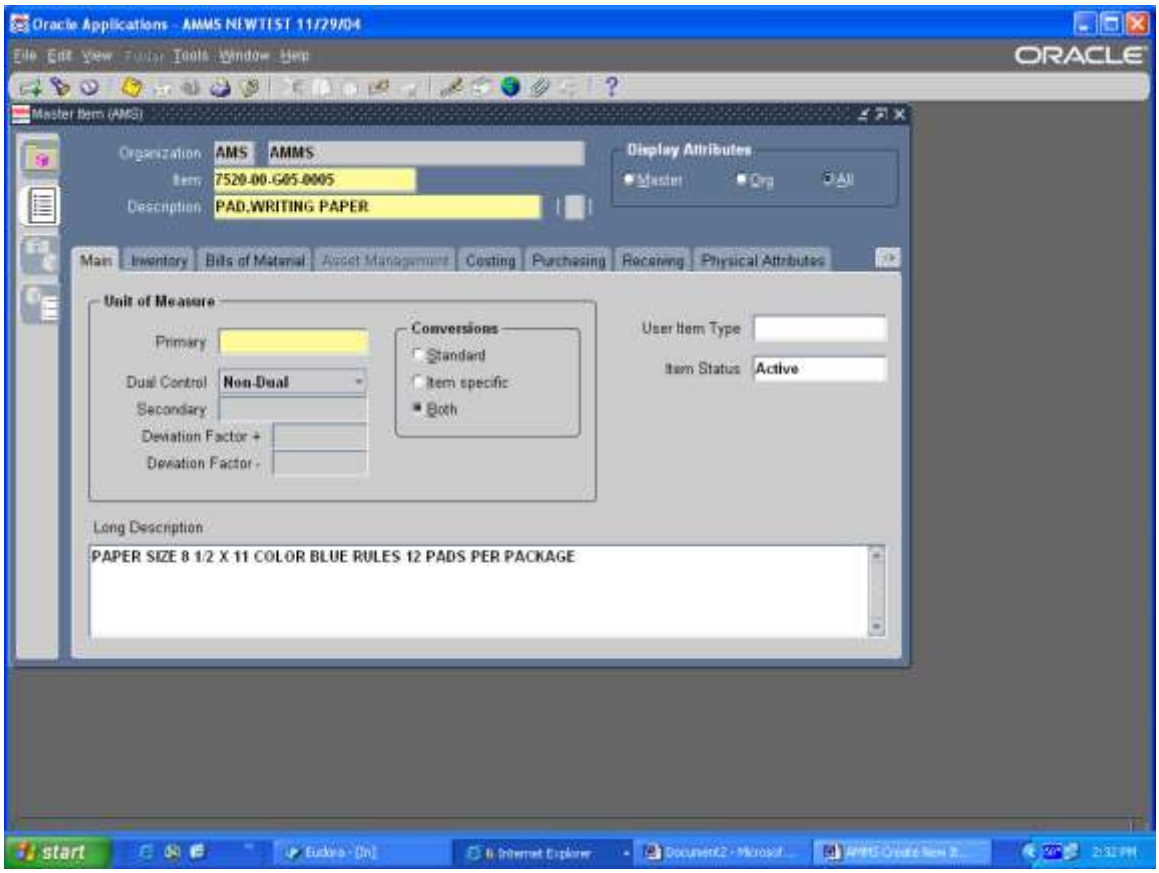
Step Description: Click on the Long Description field at the bottom of the screen

Expected Results/Actions: Cursor moves



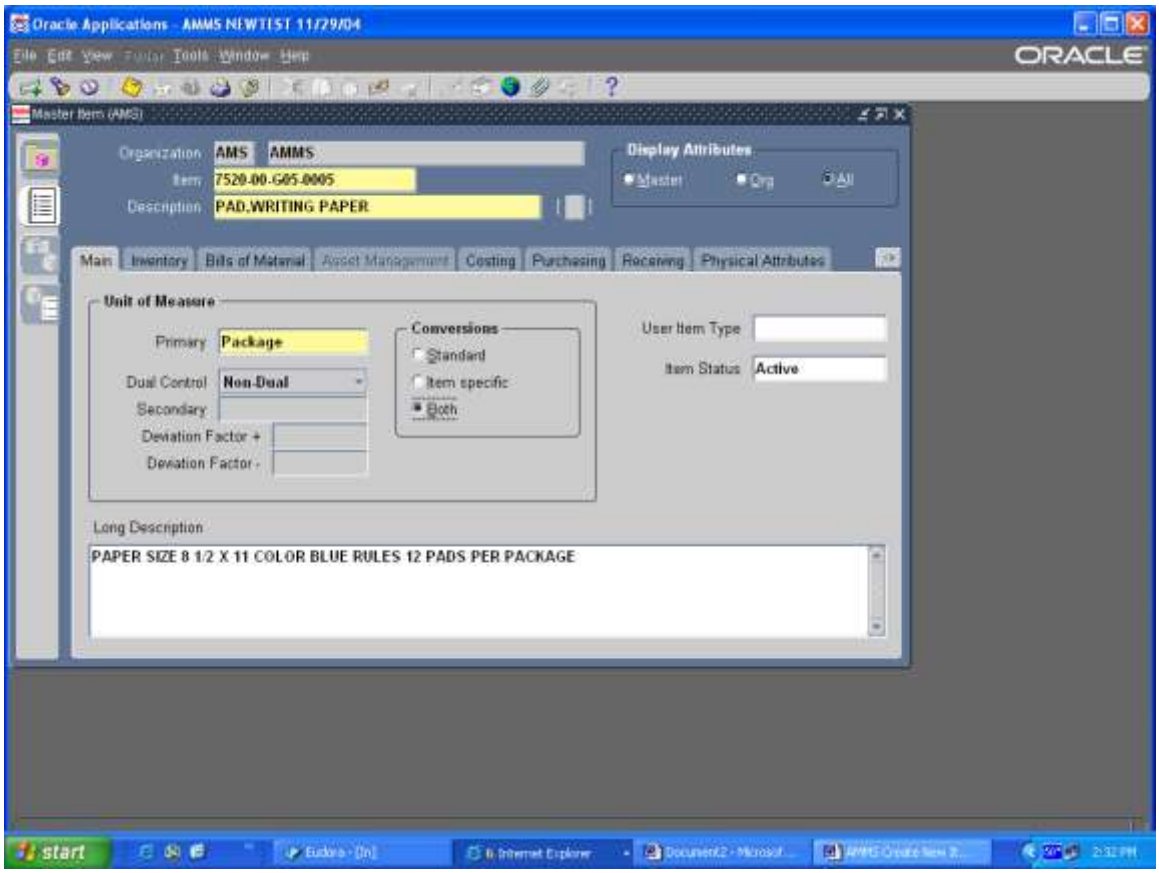
Step Description: Enter the Entire Item Description.

Expected Results/Actions: Field is Populated.



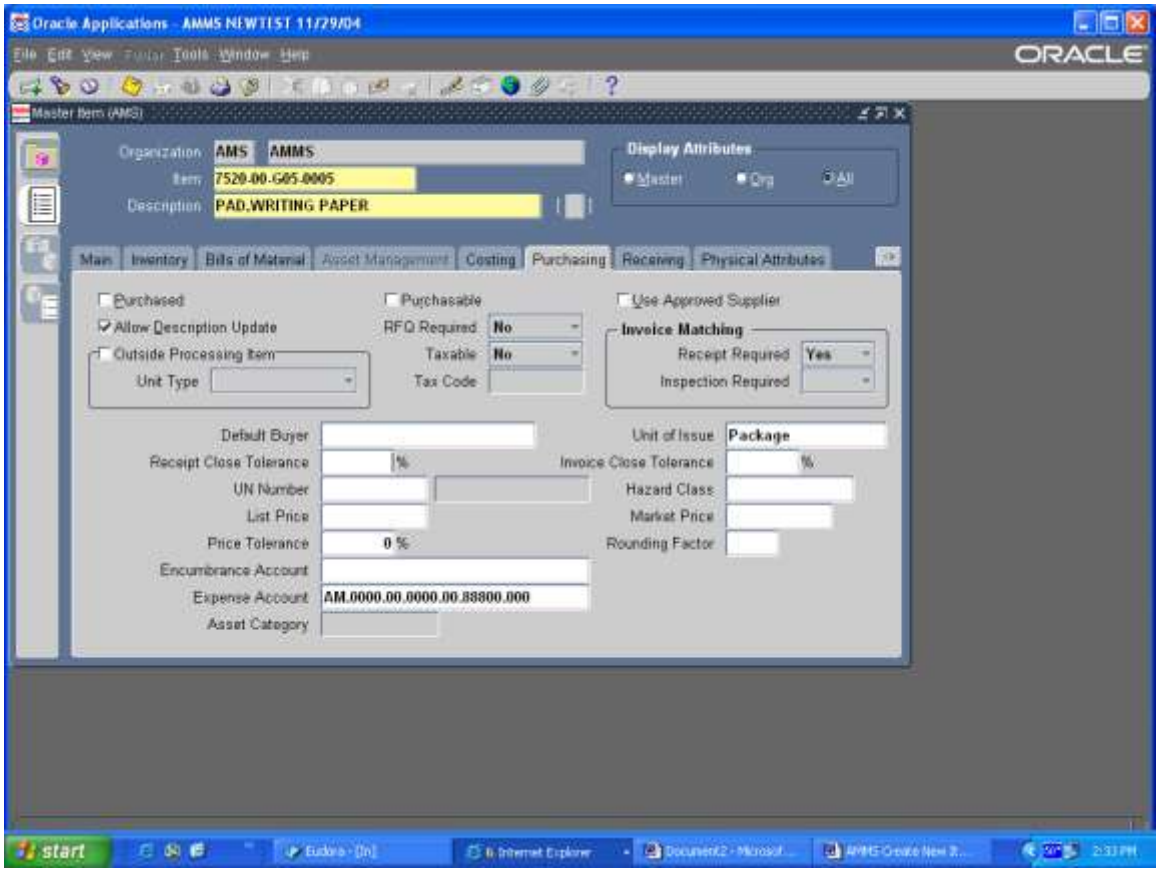
Step Description: Click on the Primary Unit of Measure field and change if necessary from List of Values (LOV) then Click OK **Please remember to select the correct Primary UOM as to this field can never be changed.**

Expected Results/Actions: U/I is updated



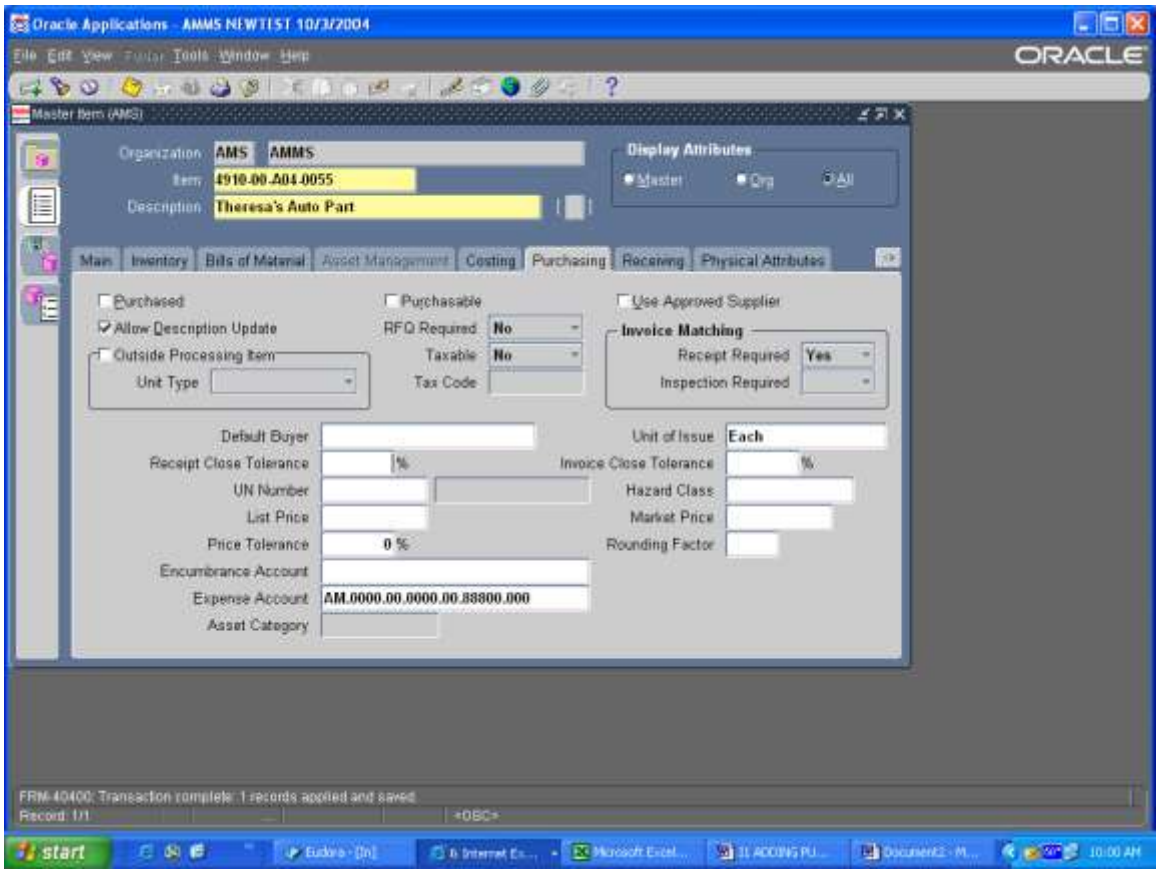
Step Description: Navigate to the Purchasing Tab, go to the Unit of Issue field and select the Unit of Issue from the LOV, this should match the Primary UOM.

Expected Results/Actions: Purchasing Unit of Issue is changed



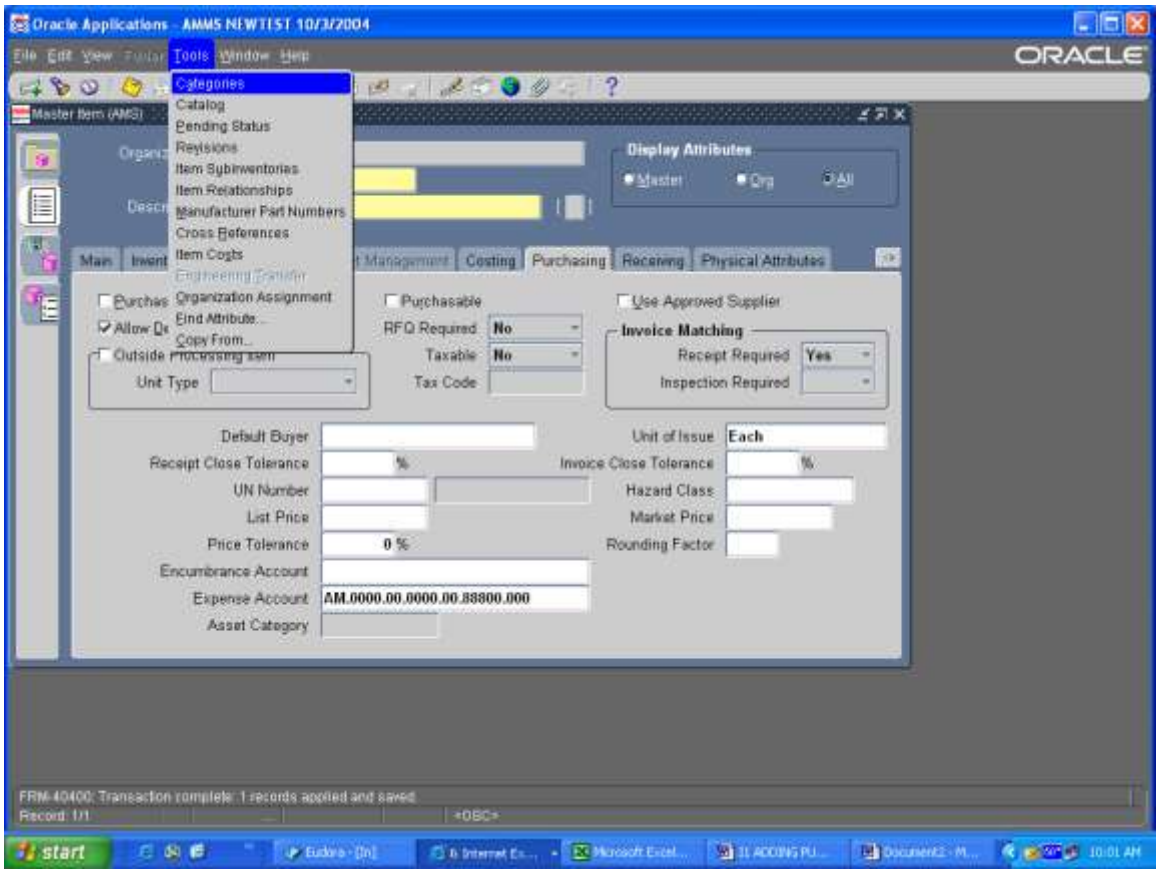
Step Description: Save Information Entered

Expected Results/Actions: Transaction Complete Message at the bottom of the form.



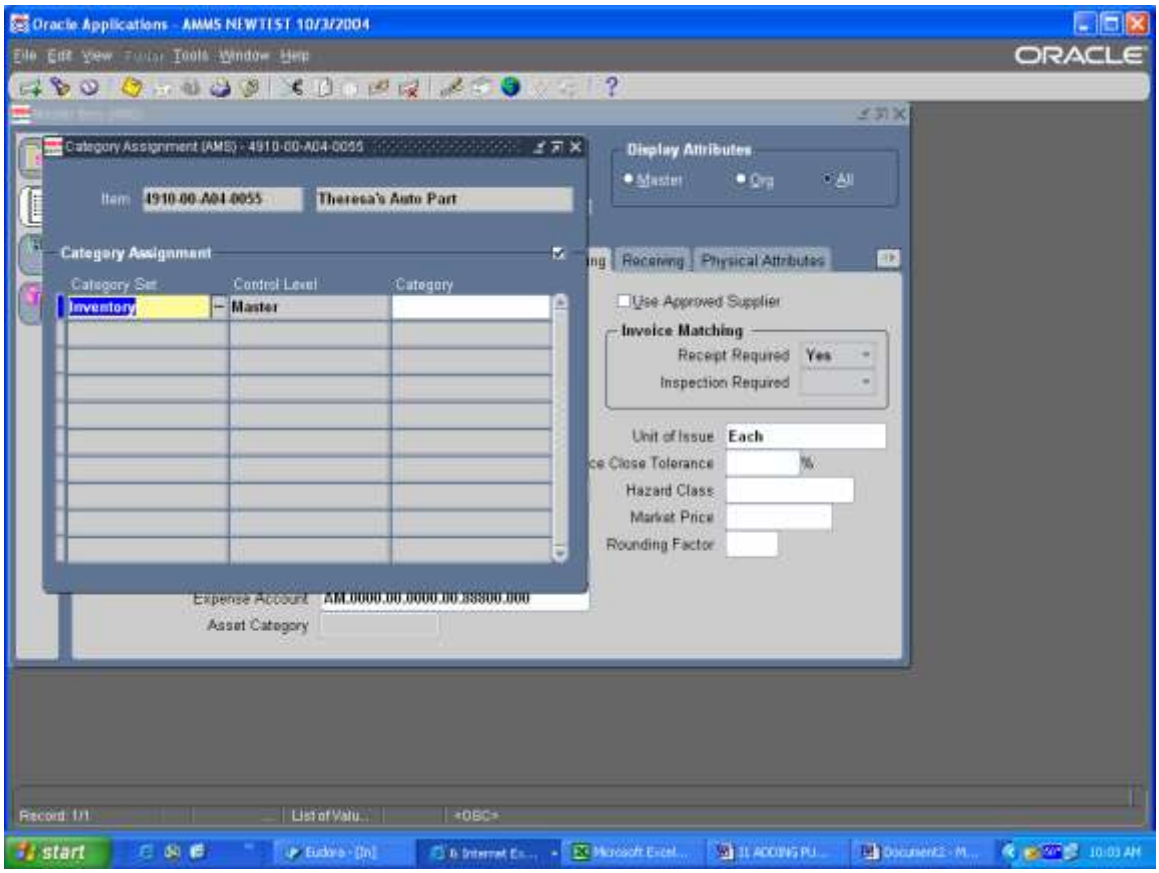
Step Description: Navigate to “Tools” and choose “Categories

Expected Results: Category form opens.



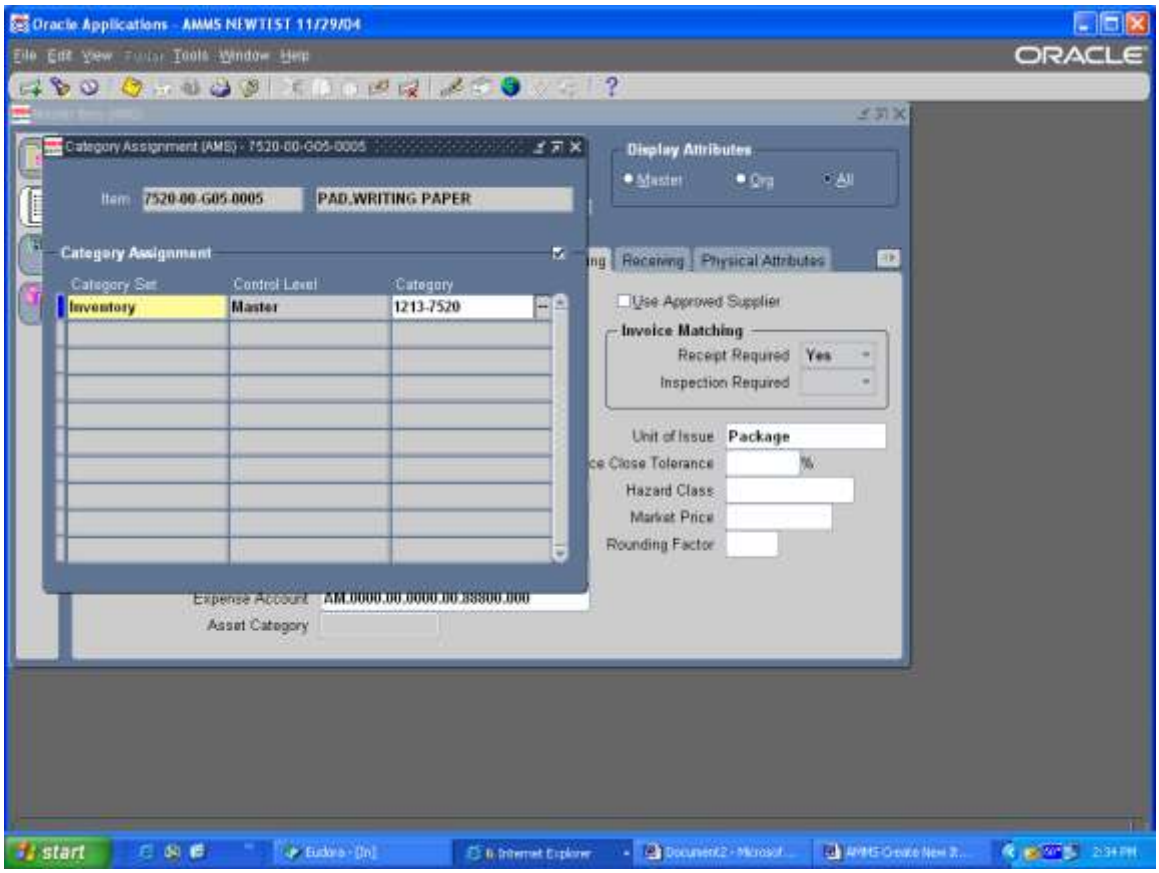
Step Description: At the Category Set field click on the LOV choose “Inventory”

Expected Results/Actions: Field is Populated.



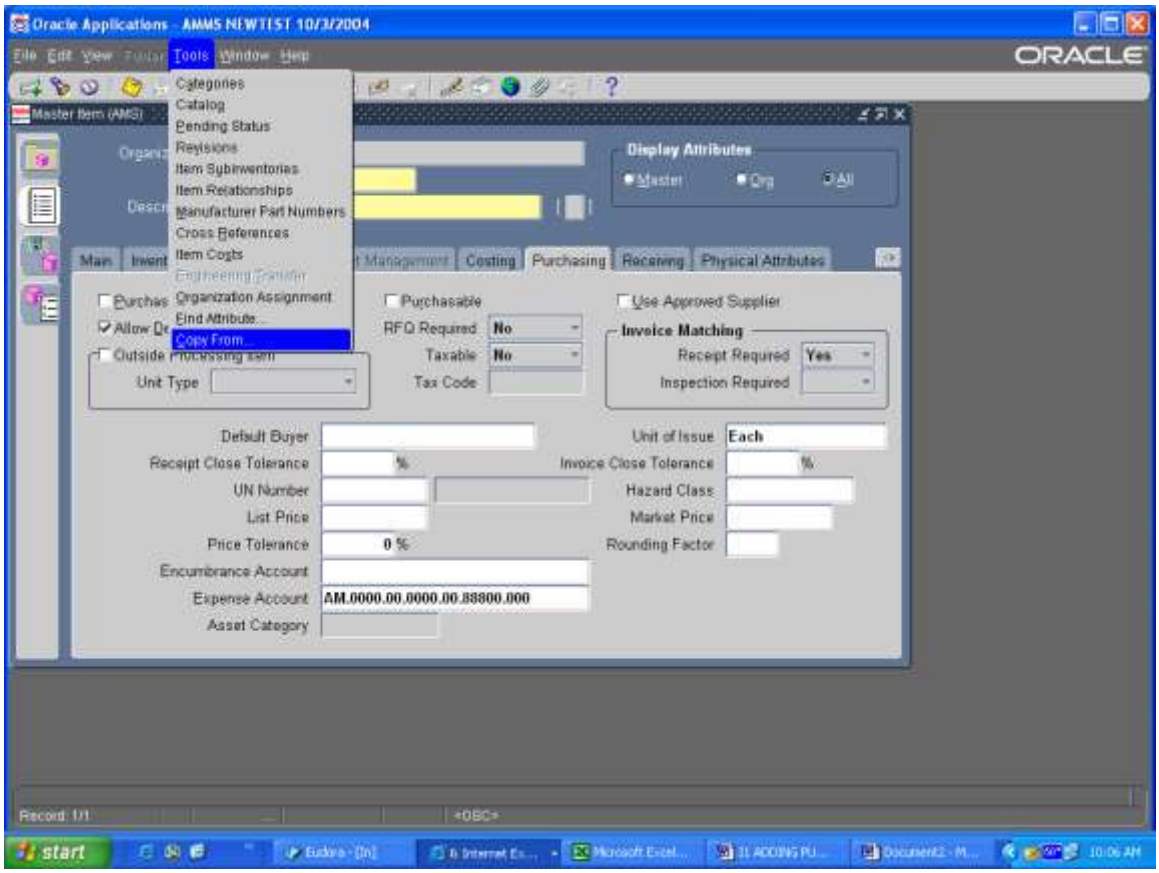
Step Description: Tab to Category and Enter the Correct Category, NASA INVENTORY ACCOUNT CODE (NIAC) for that new item number, SAVE and CLOSE form. A list of NIAC is included.

Expected Results/Actions: Transaction Complete Message at the bottom of the form.



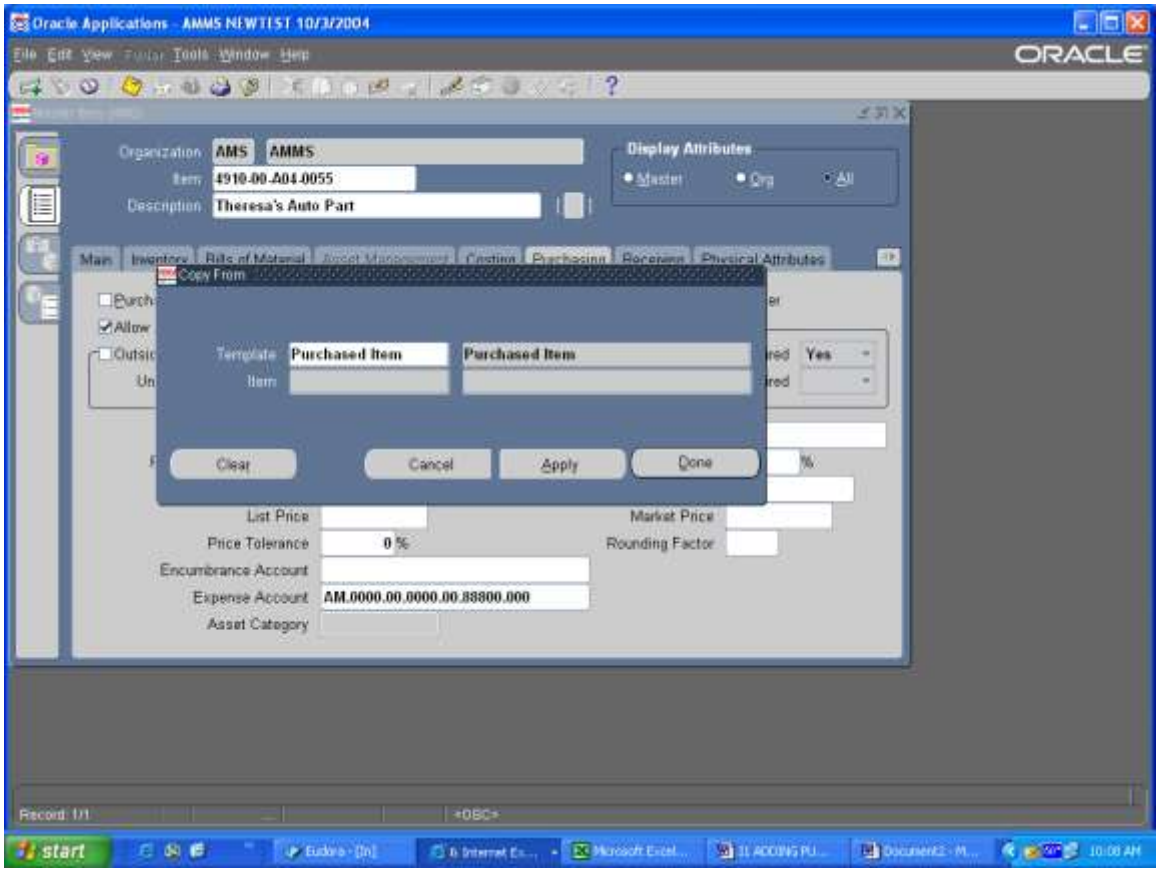
Step Description: Navigate to “Tools” and choose “Copy From”

Expected Results/Actions: Copy From form opens



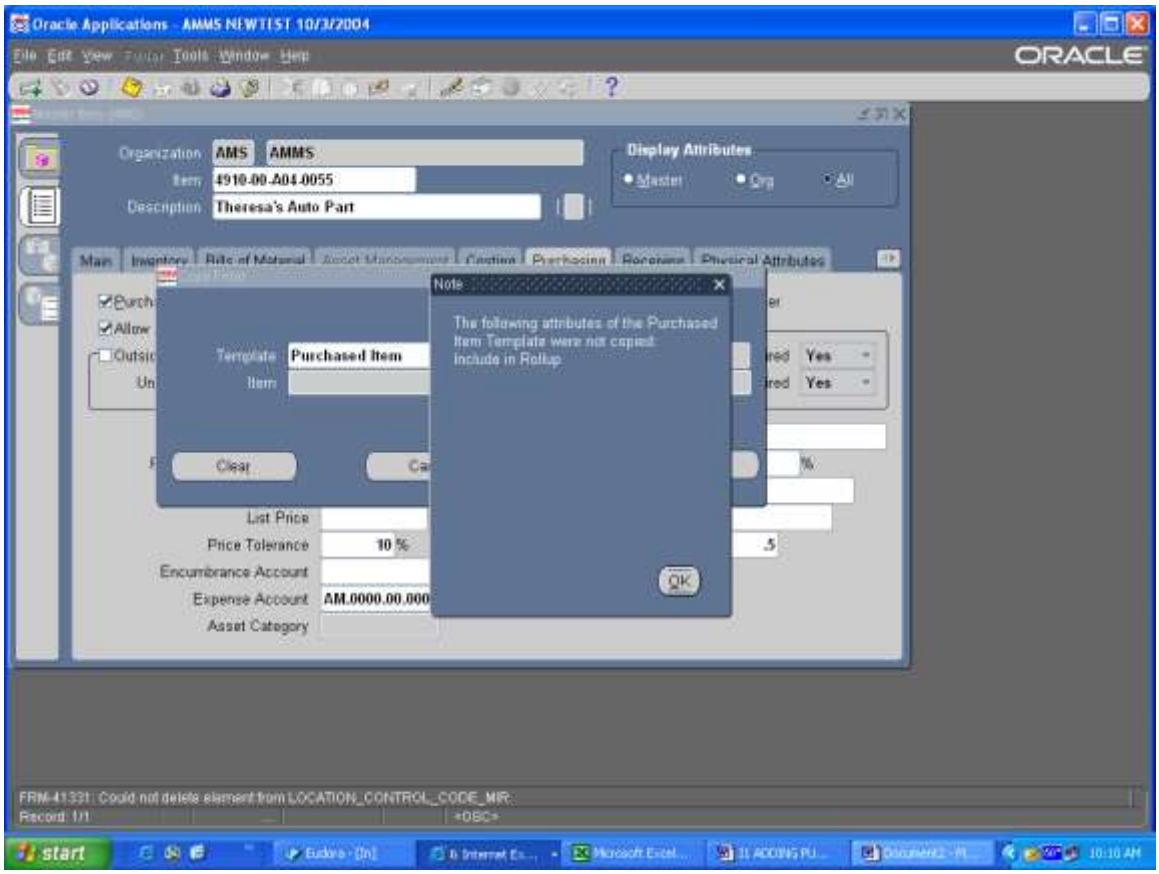
Step Description: Click on the LOV and select item type that you are loading. To copy an Item Template. Click “Apply” then click “Done”

Expected Results/Actions: Note Message will appear



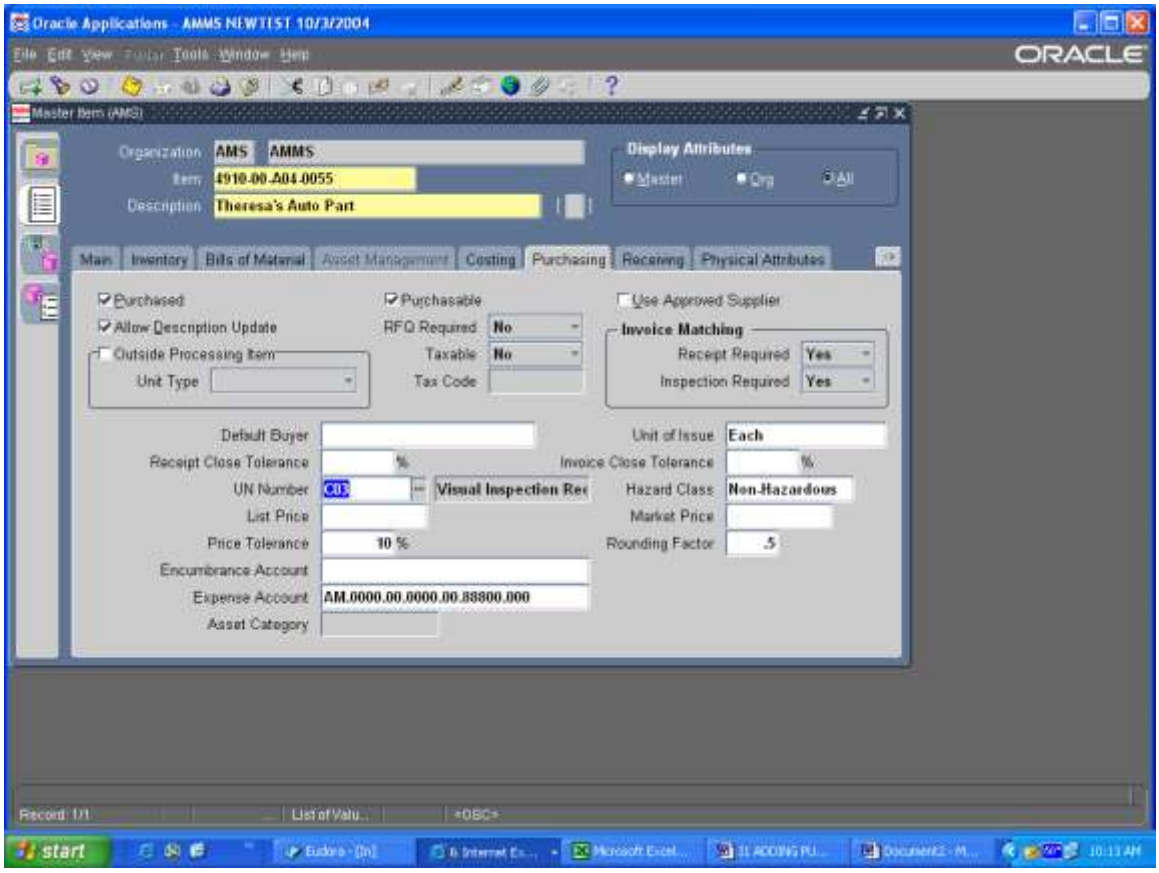
Step Description: Note Window will appear with message “The following attributes of the Purchased Item Template were not copied: Include in Roll UP. Click OK to this Note.

Expected Results/Actions: Window will close, Returns to the Master Items form with “Template Implemented” message at the bottom of the form.



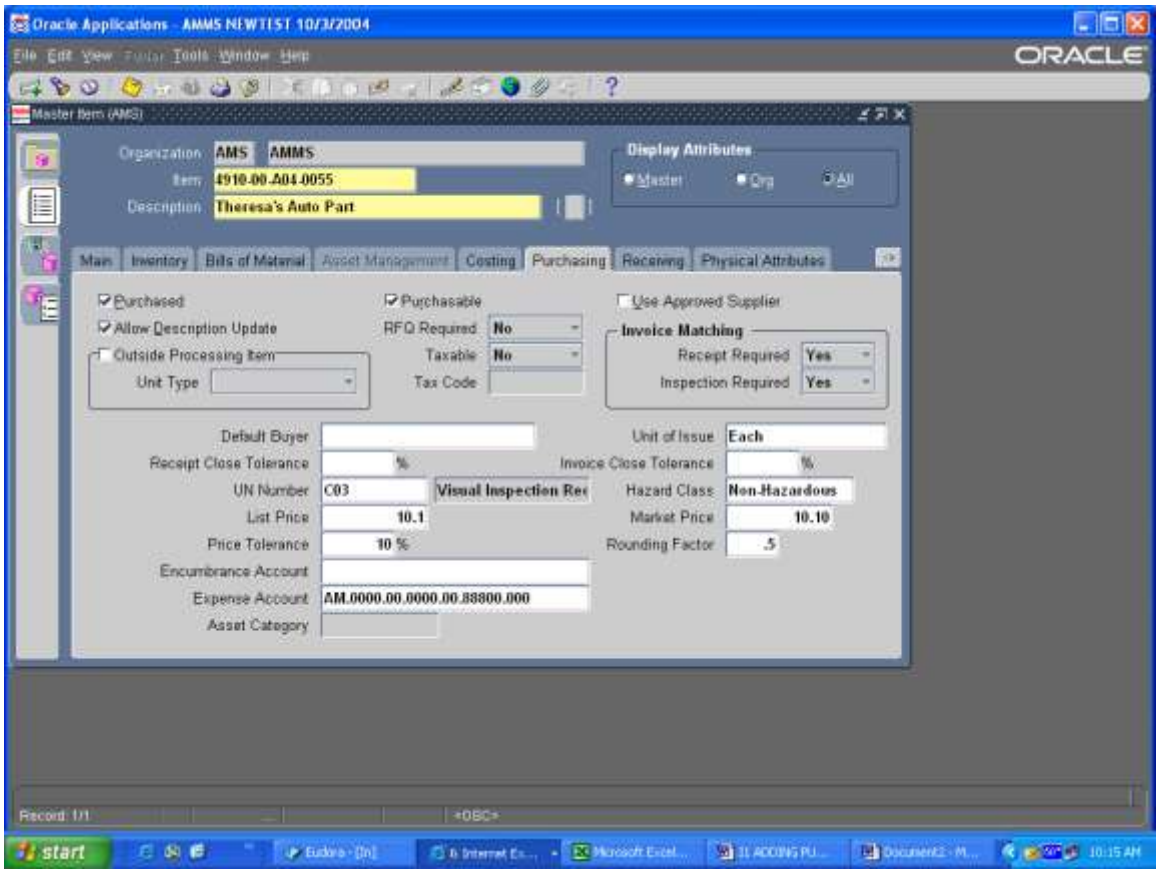
Step Description: Navigate to the “Purchasing” Tab and verify the UN code it will default to CO3 if different change UN code.

Expected Results/Actions: Field is Populated.



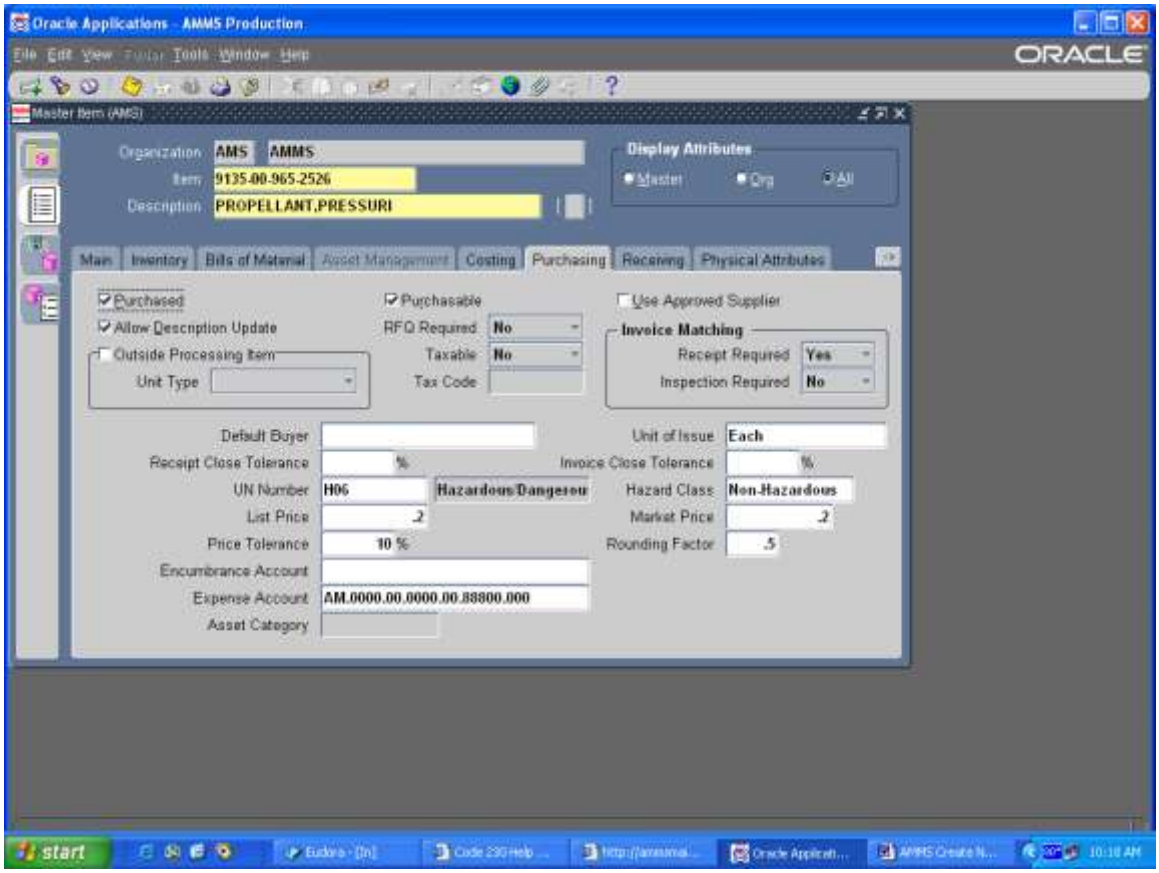
Step Description: At the “Purchasing” Tab enter the “List and Market Price” of the item

Expected Results/Actions: Fields are Populated



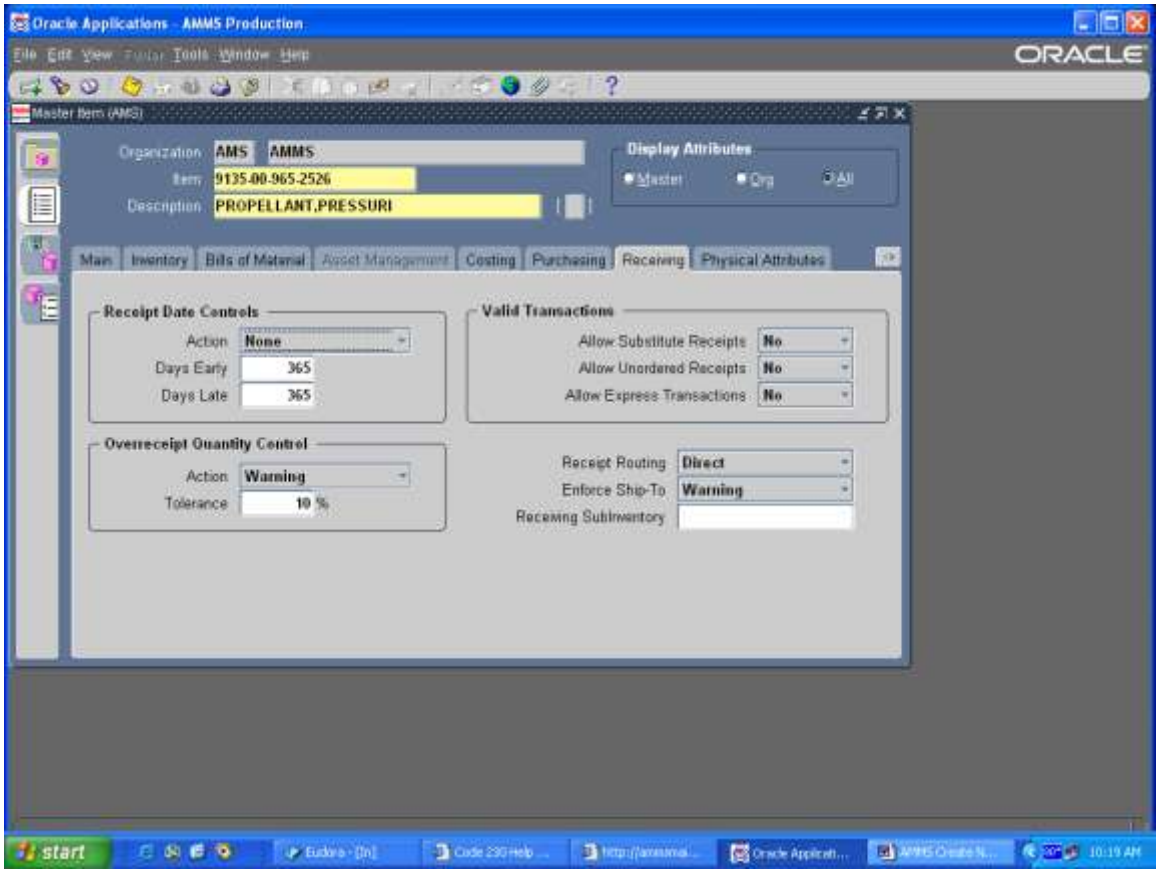
Step Description: Still at the Purchasing Tab, in the Invoice Matching area, change Inspection Required to NO

Expected Results: Field will change



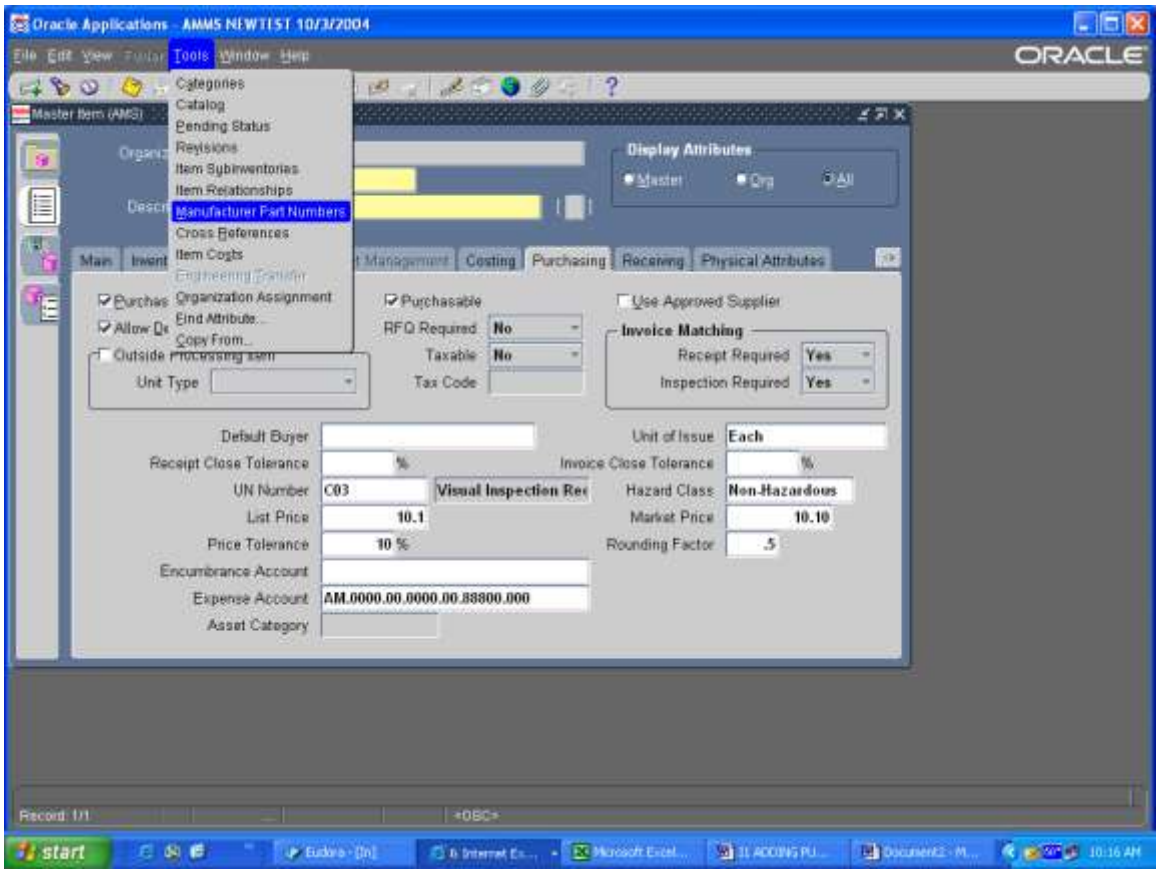
Step Description: At the Receiving Tab, in the bottom right hand corner, Receipt Routing, change this to Direct

Expected Results: Field will change



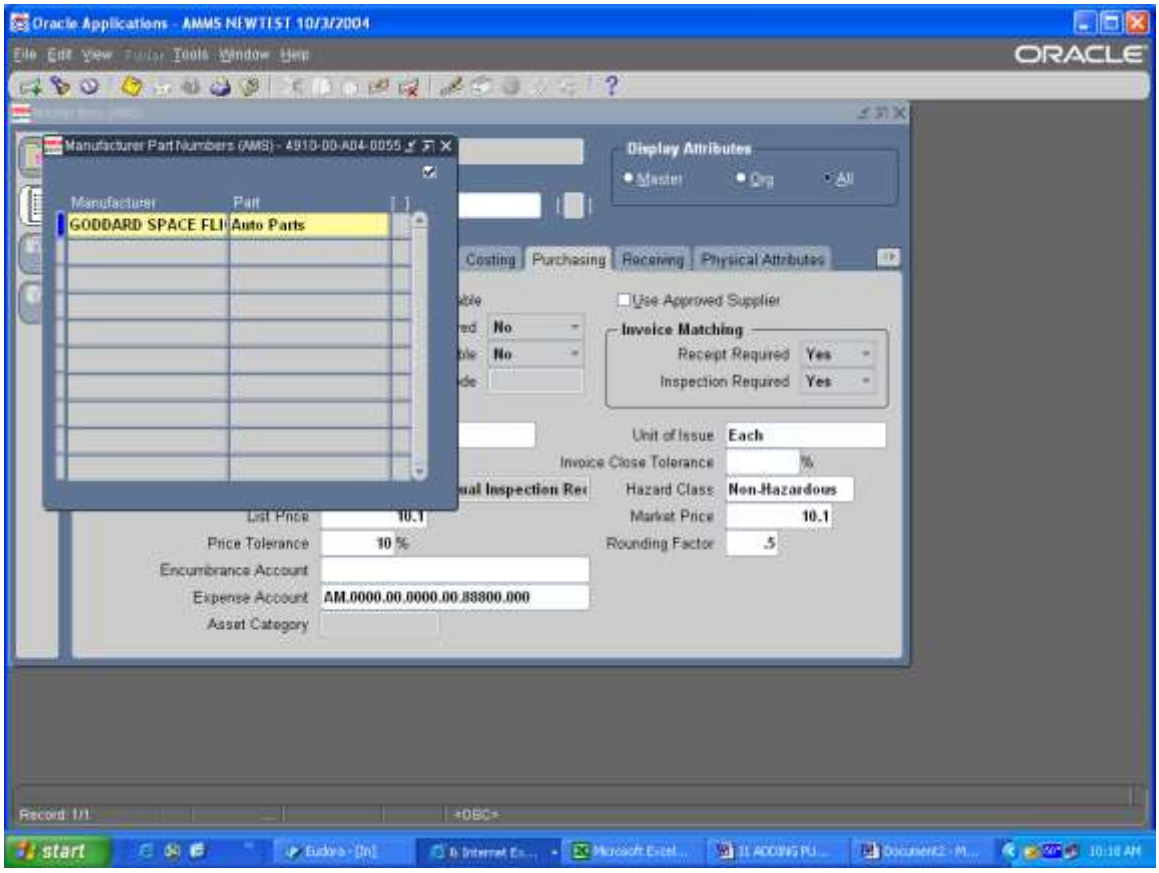
Step Description: Navigate to “Tools” and choose “Manufacturer Part Number”

Expected Results/Actions: Manufacturer Form is opened



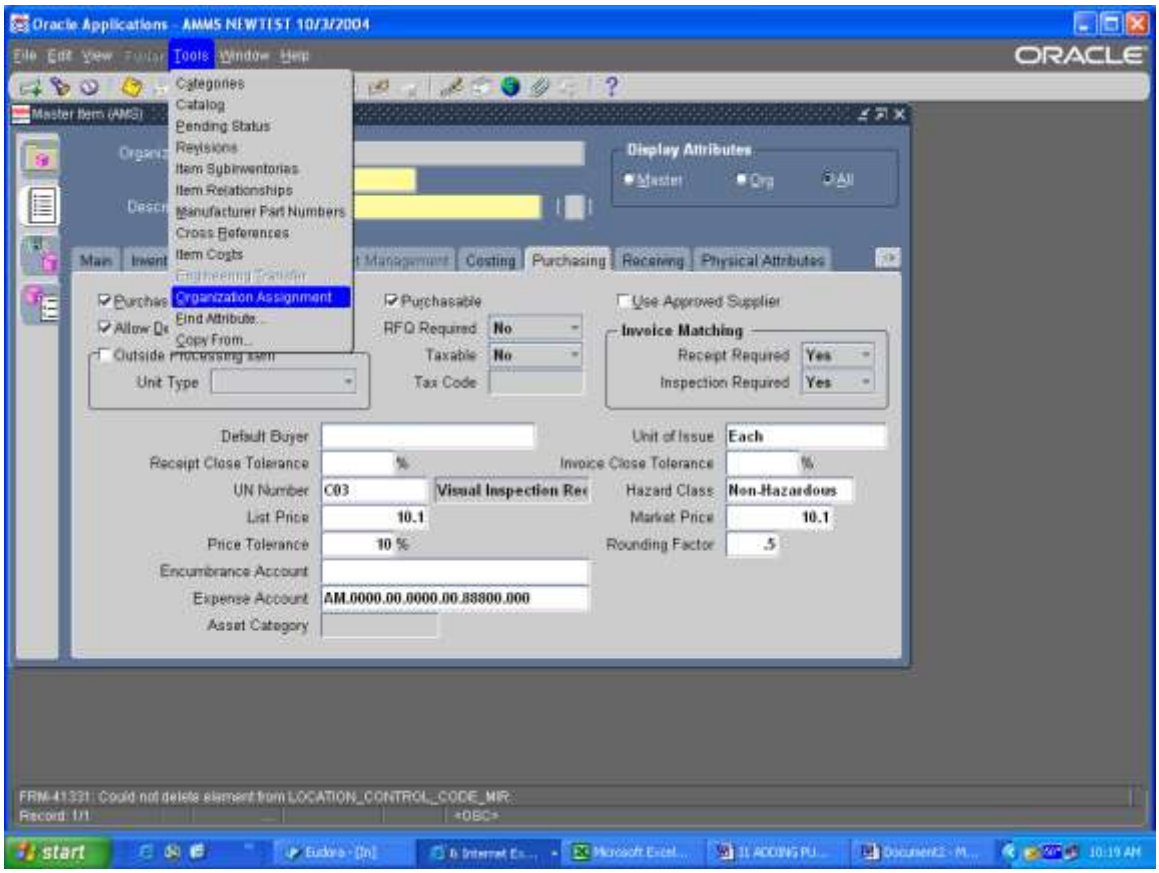
Step Description: Choose the Manufacture from the LOV and enter the part number. Click on “Save” then close the form.

Expected Results/Actions: Manufacture information is populated



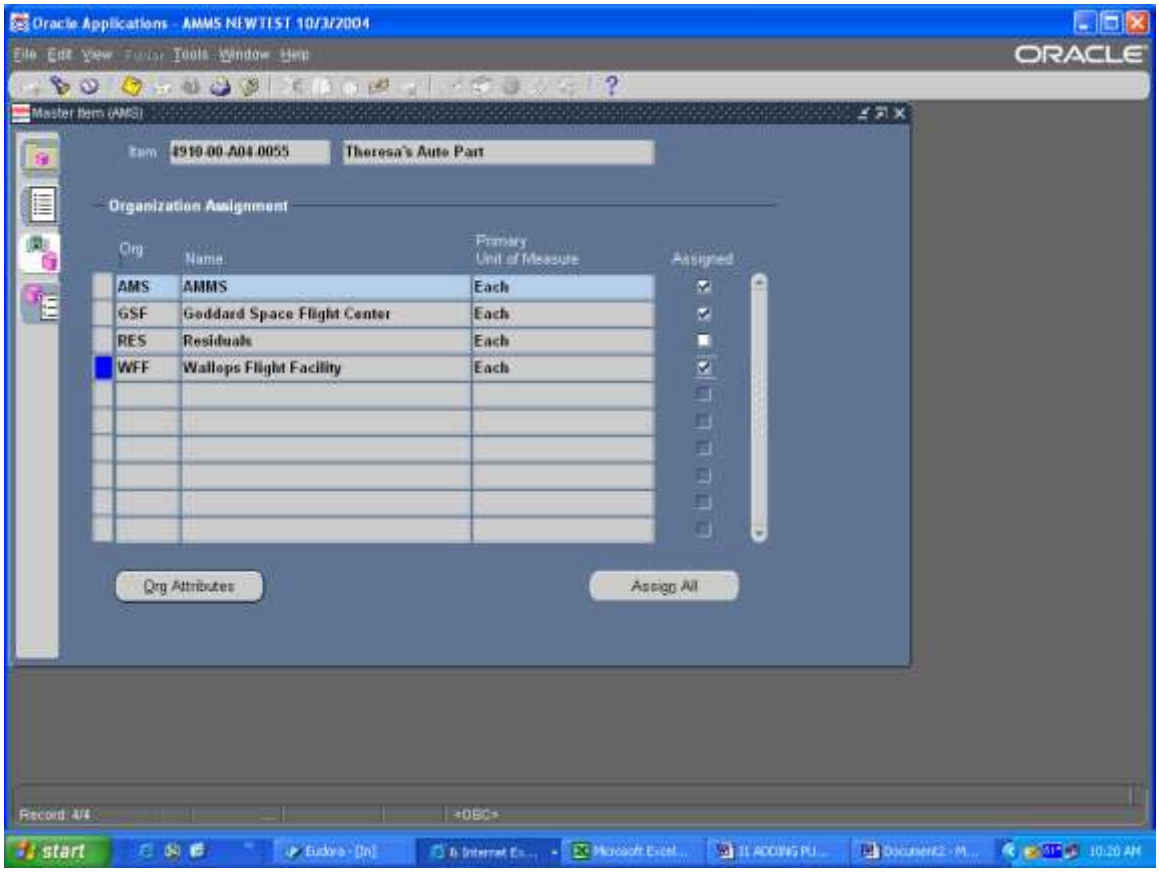
Step Description: Navigate to “Tools” and choose “Organization Assignment”

Expected Results/Actions: Organization Assignment form is opened.



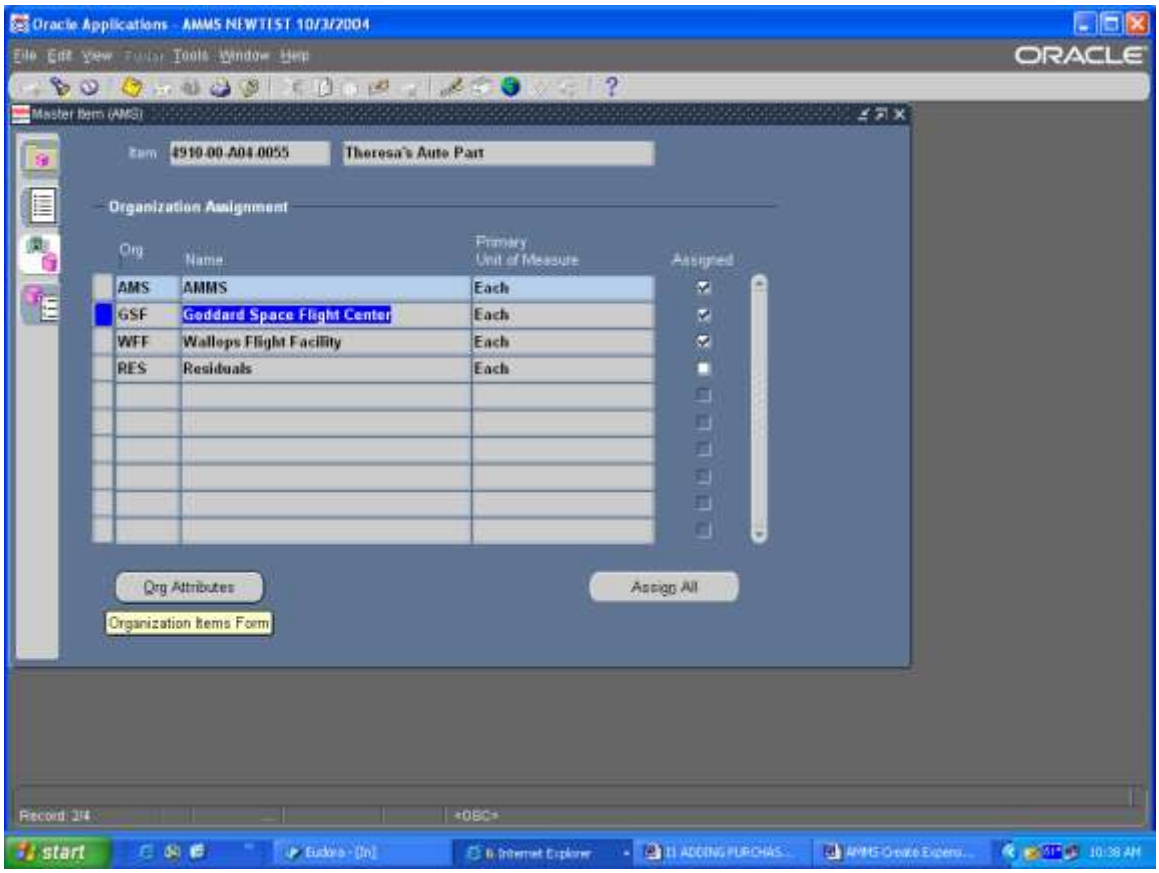
Step Description: Click on the white box next to GSF and WFF, click Save.

Expected Results/Actions: AMS, GSF and WFF have check marks next to them.



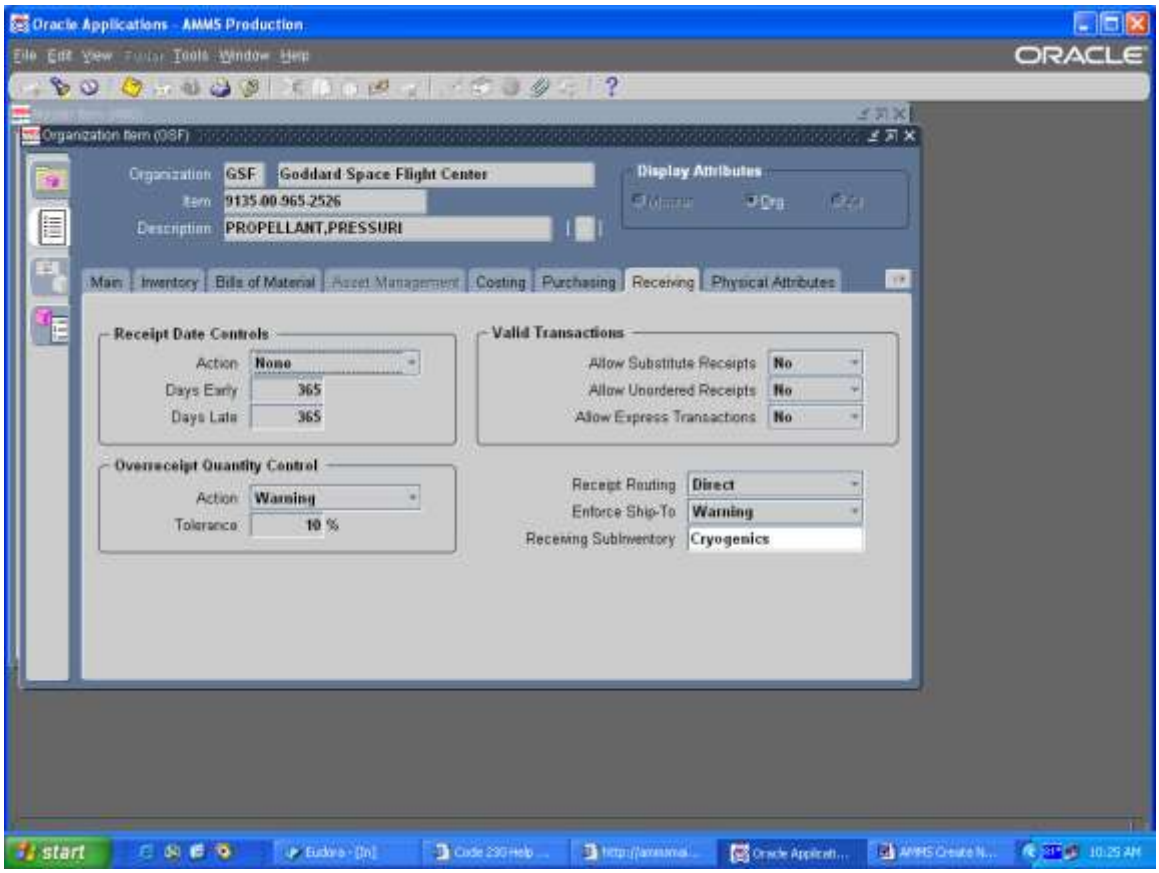
Step Description: From the Organization Assignments screen click on the GSF and then click on the Org Attributes button at the bottom of the screen

Expected Results/Actions: Organization Item window appears



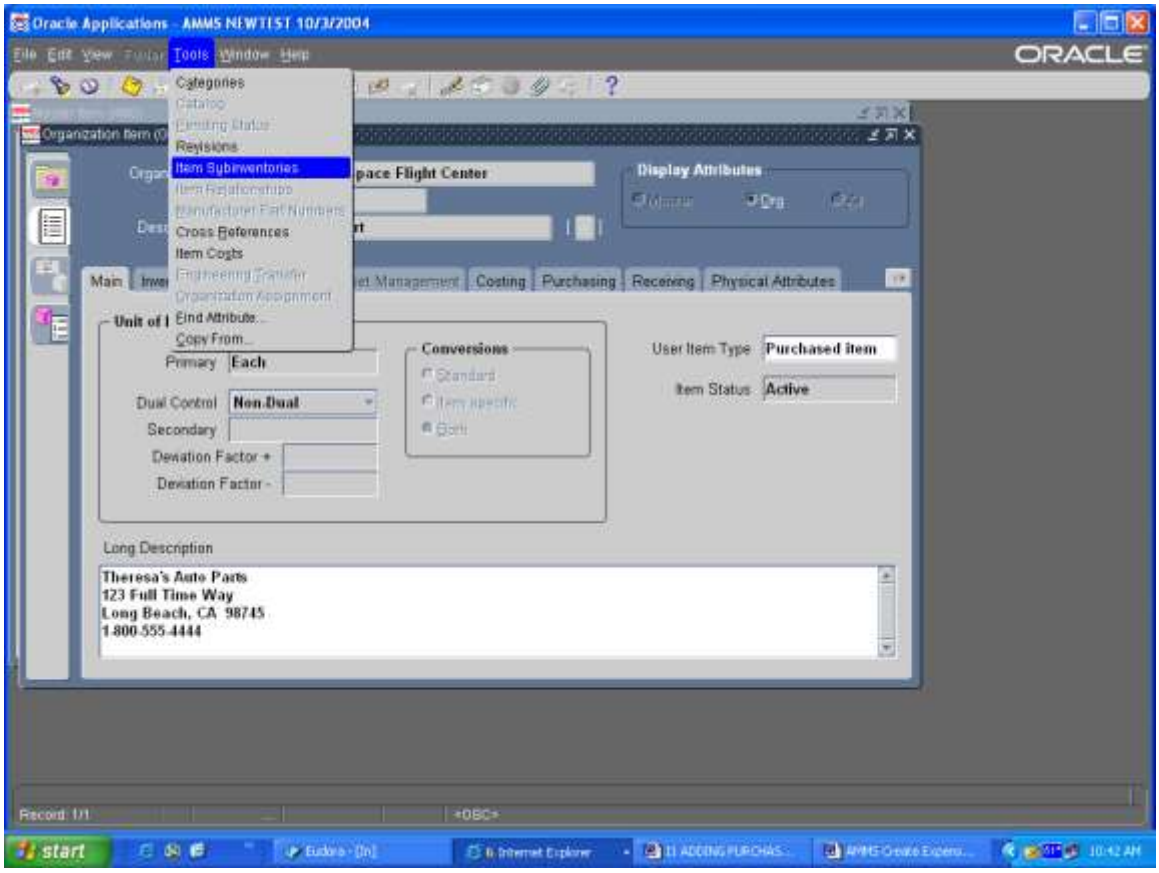
Step Description: Verify that all of the information at the Organization Level is the same as the information you entered at the Master Level. Check the Purchasing tab to make sure the Inspection Required is set to NO, also check the Receiving tab and make sure the Receipt Routing is set to Direct. If fields are different update at the organization level

Expected Results: Field will reflect correct data



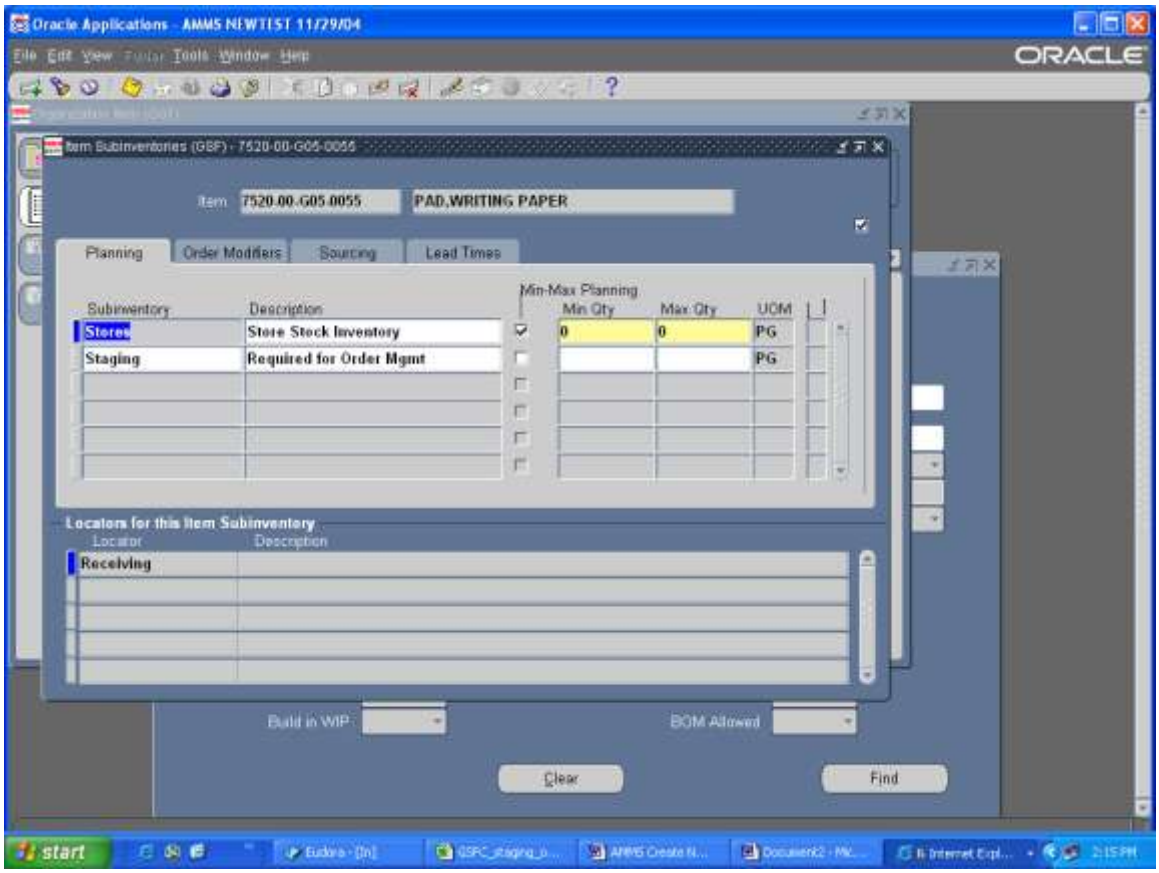
Step Description: Navigate to “Tools” and choose “Item Sub inventory”

Expected Results/Actions: Item Sub inventory Form opens



Step Description: Choose the correct primary sub-inventory from the LOV then click "OK". While on the primary sub-inventory, check the box for Min Max Planning. Click on the Locator field at the bottom of the screen and enter Receiving as the Locator. All items MUST also be assigned to the Staging sub-inventory.

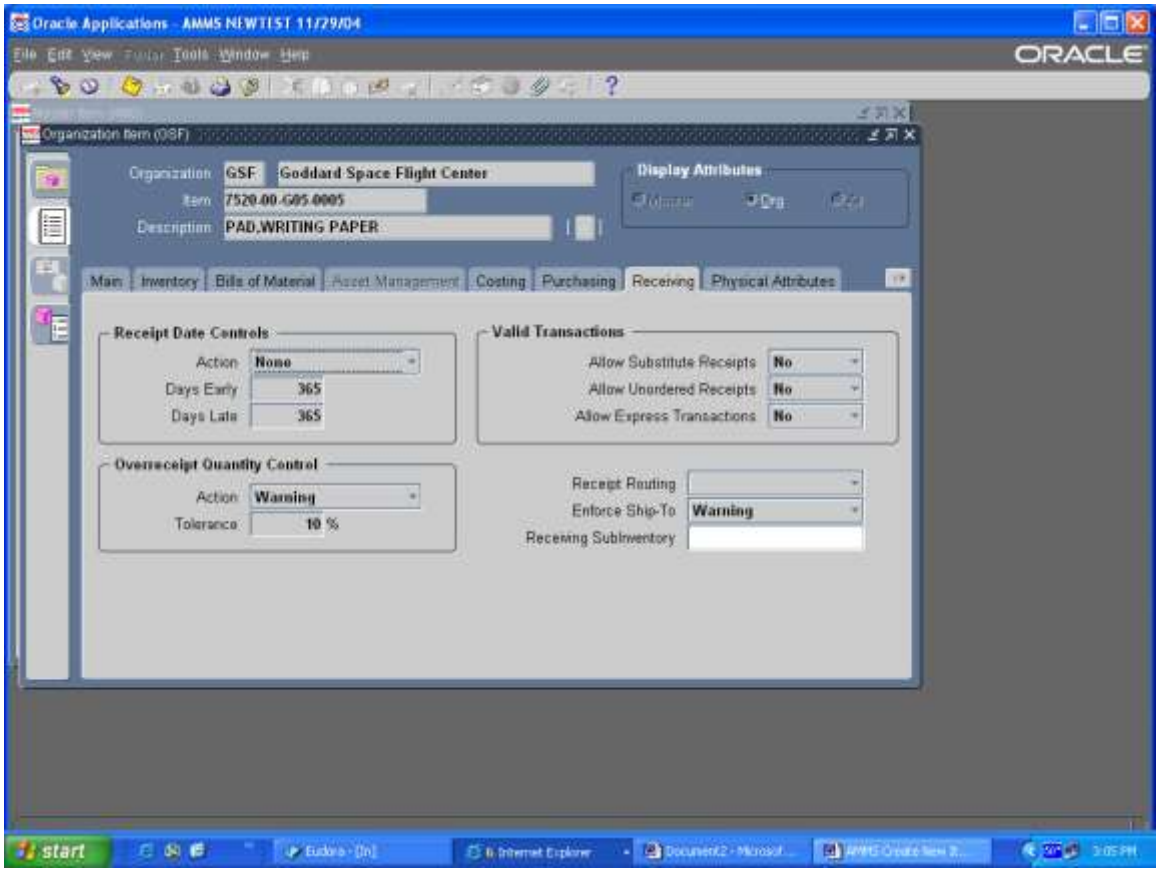
Expected Results/Actions: Sub-inventory and Locator Information is Populated



Close the Item Sub Inventory window.

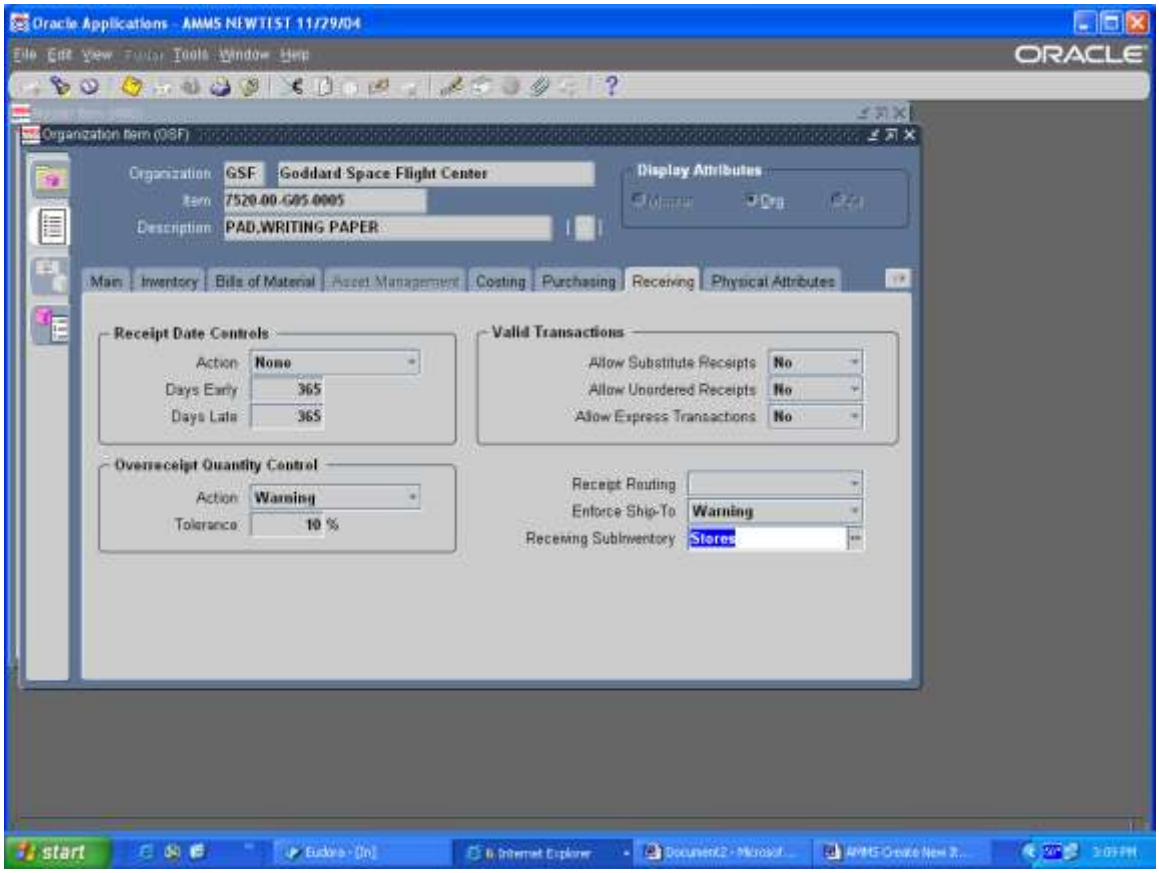
Step Description: At the Organization Items (GSF) window, select the “Receiving” Tab

Expected Results/Actions: You will be at the Receiving Tab



Step Description: In the Receiving Sub Inventory field click on the LOV and enter the same primary sub inventory as you did for the sub-inventory screen.

Expected Results/Actions: Field will be populated



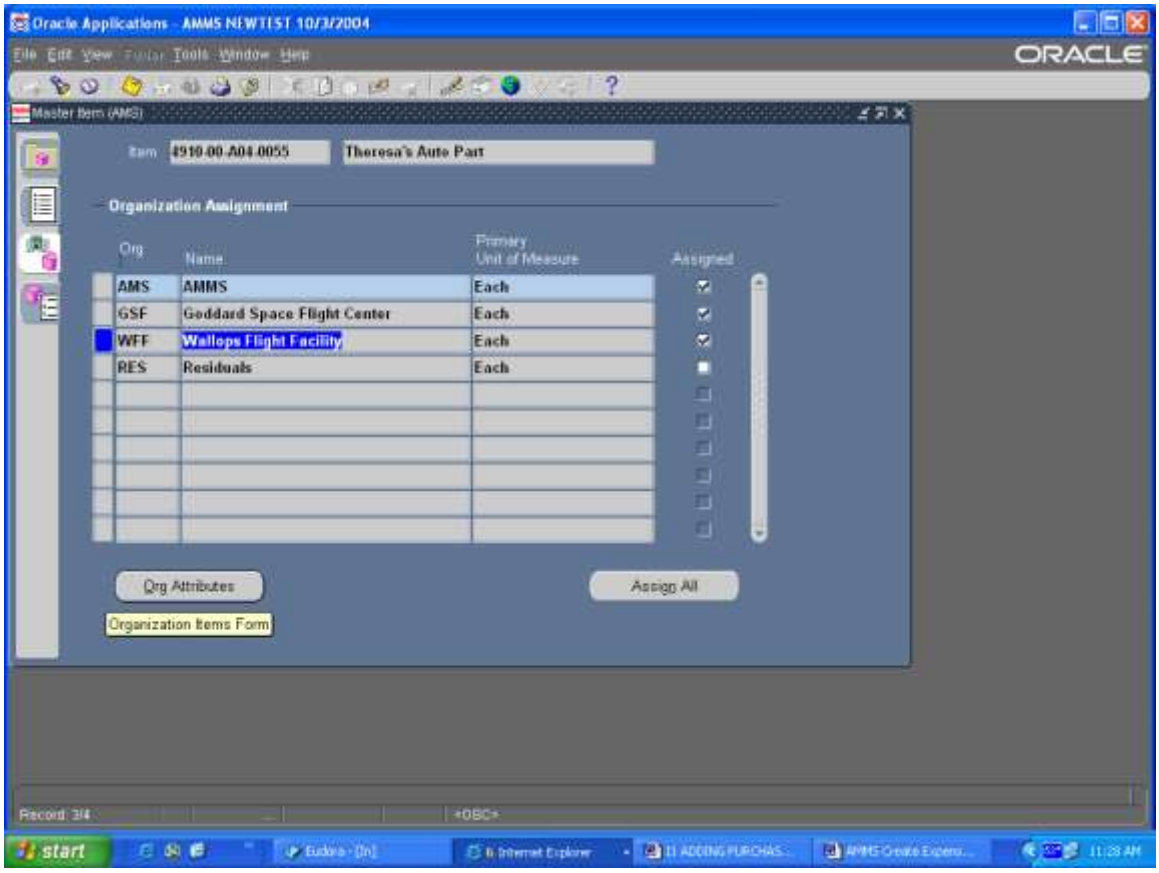
Step Description: Click on “Save” and close form

Expected Results/Actions: Transaction Complete Message.

Note: You need to add sub-inventories to both Organizations GSF and WFF.

Step Description: Close the GSF Organization Item screen and select the WFF Wallops Organization assignment click on the Organization Attributes button at the bottom of the screen

Expected Results: The Wallops Organization Item window will appear.



Step Description: Verify all data is the same as the Master Item Record and add the appropriate sub inventories following the same steps for the GSF Organization.

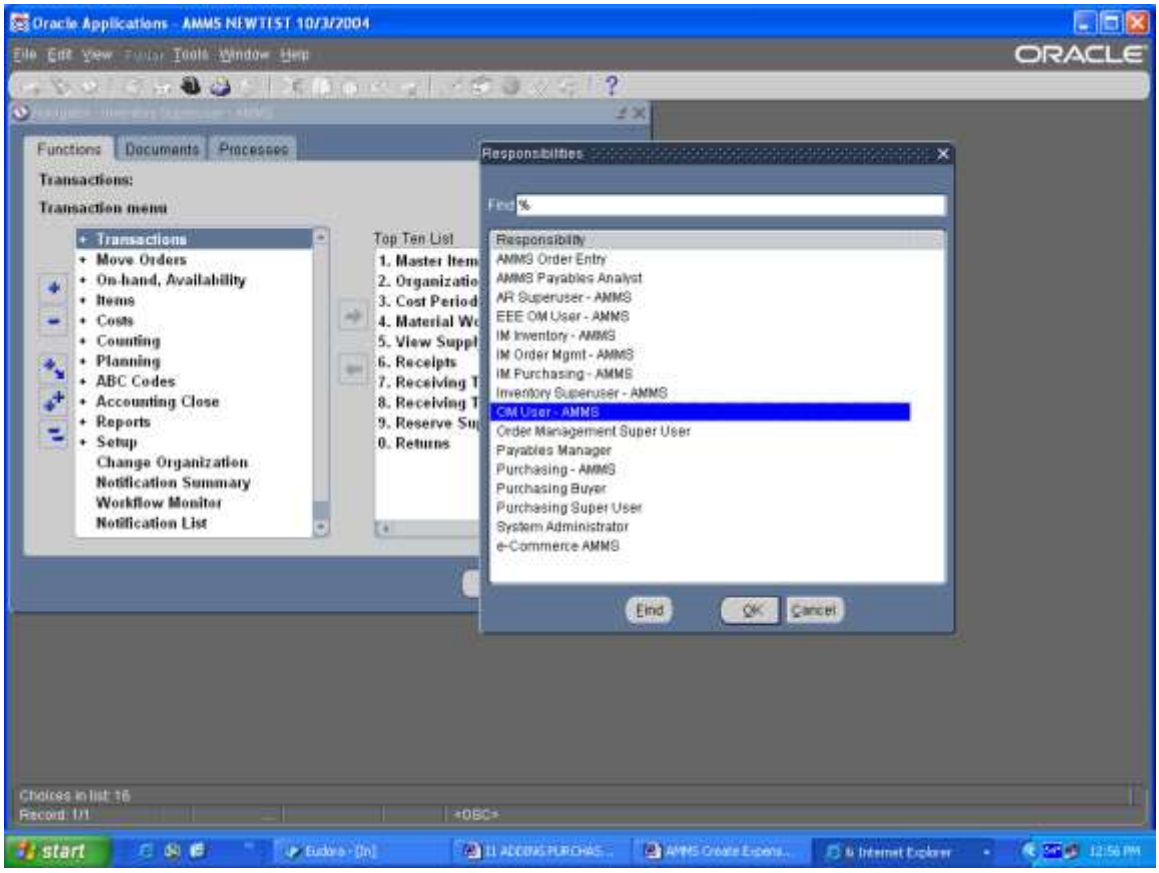
Expected Results/Actions: Sub inventories will be assigned.

Step Description: Save your work and close all forms.

Expected Results/Actions: Will be back at the IM Inventory AMMS Menu

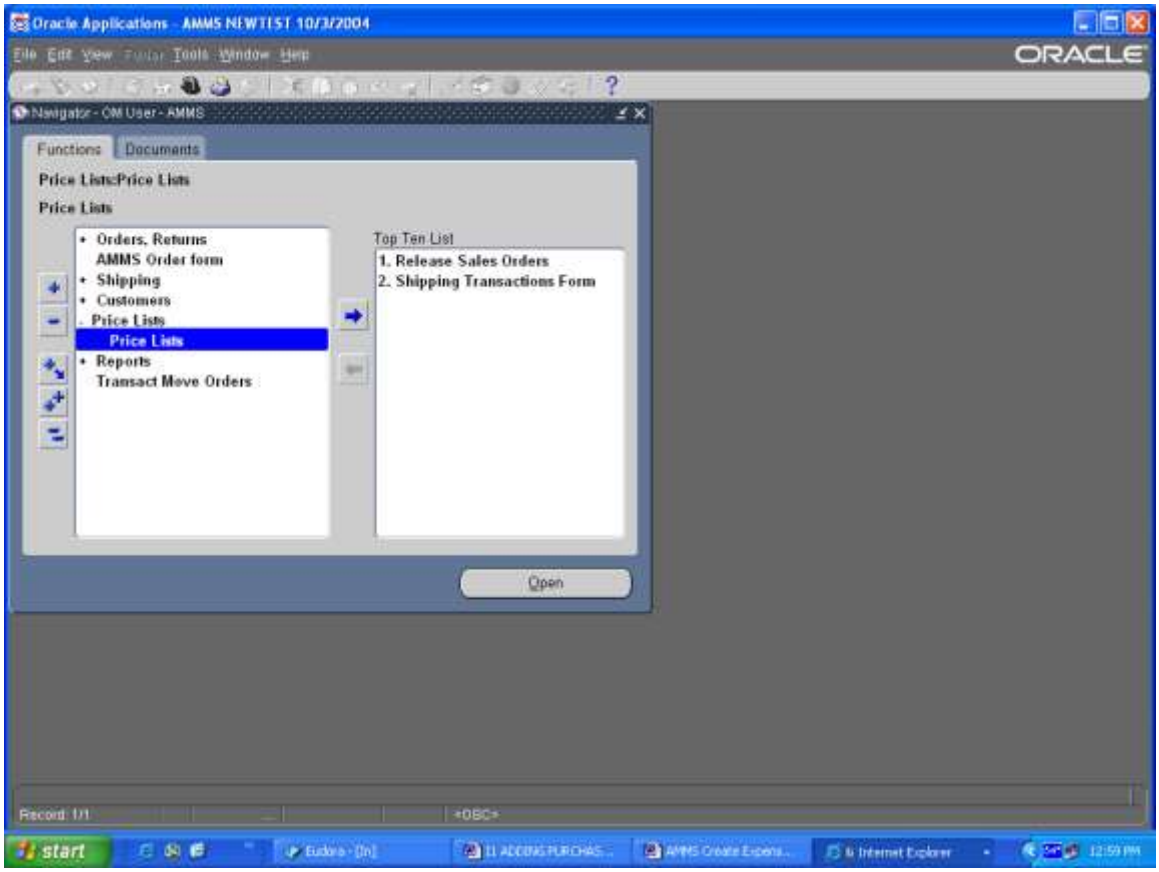
Step Description: Change responsibilities to the OM USER Responsibility

Expected Results/Actions: The OM USER main menu will appear



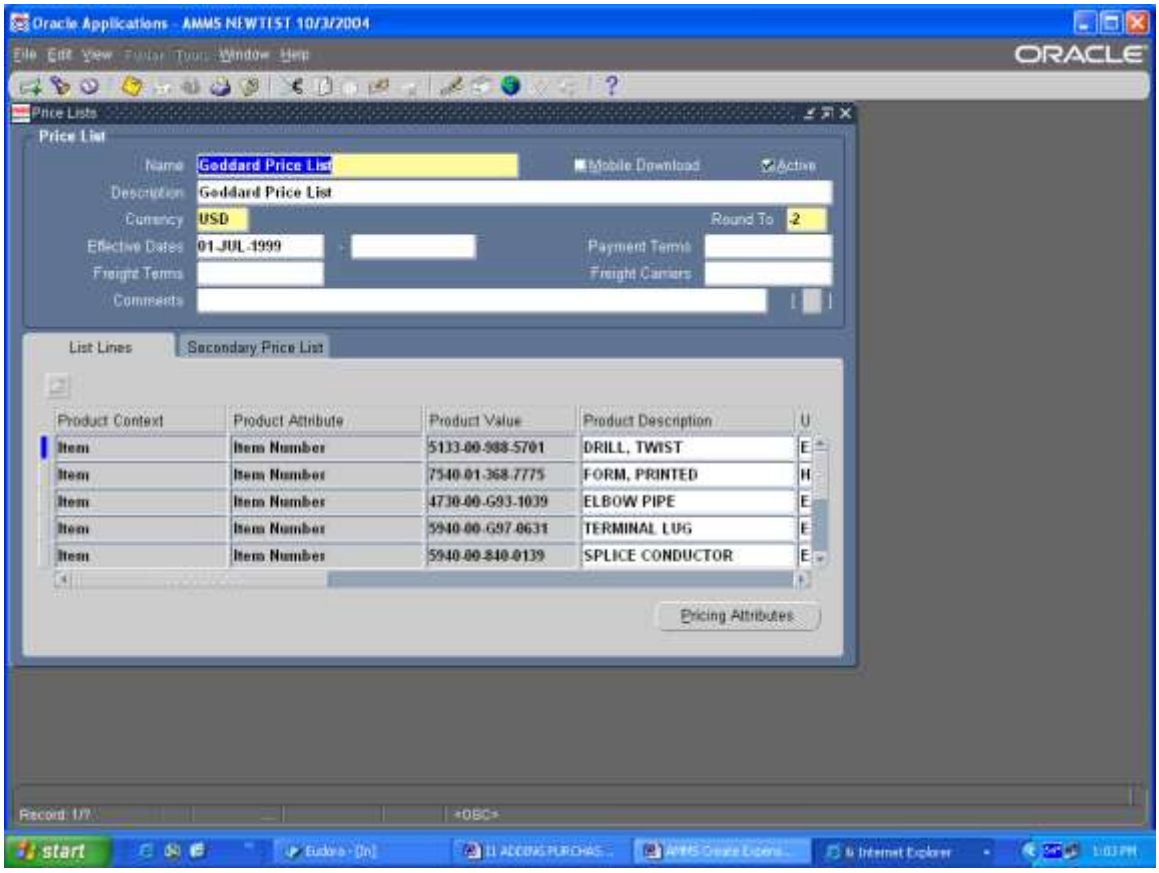
Step Description: Select Price Lists> Price List from the menu and click on open

Expected Results/Actions: A blank Price List screen will appear



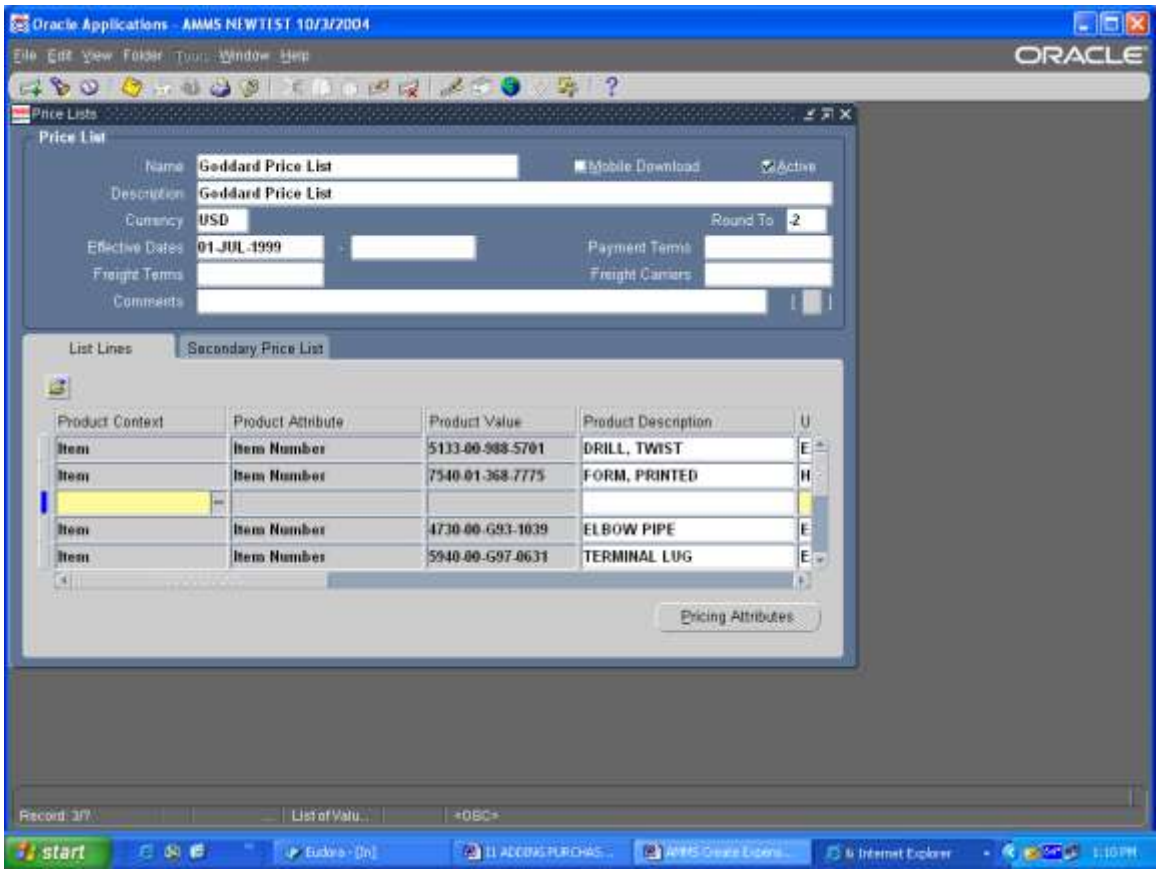
Step Description: On your keyboard hit the F11 button to send Oracle into query mode, then hold down the Ctrl button and hit F11 again to end the query.

Expected Results/Actions: The Goddard Price List will appear



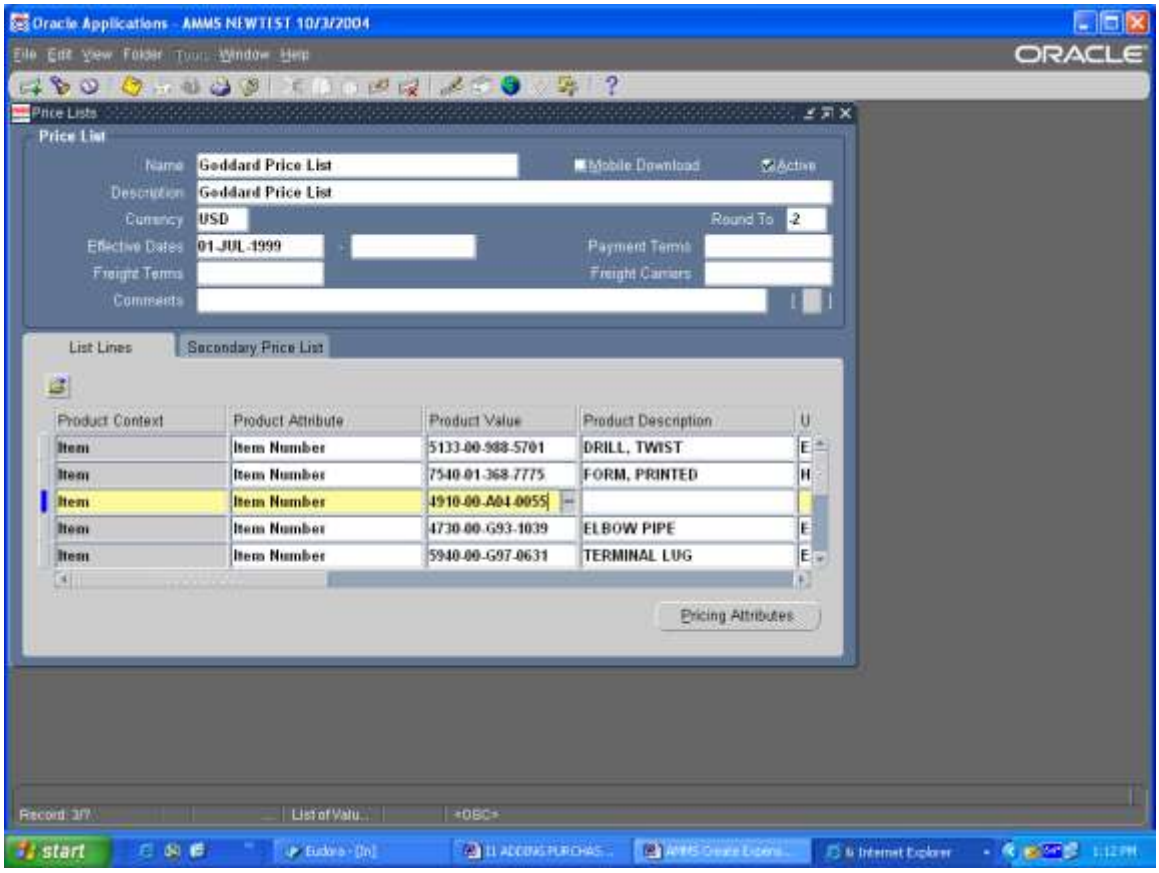
Step Description: At the bottom of the Goddard Price List window, in the List Line section, click on an occupied line then click on the green plus sign (+) on the tool bar to add a new line, make sure you are at the bottom of the screen.

Expected Results/Actions: A blank line will appear and the Item field will be yellow



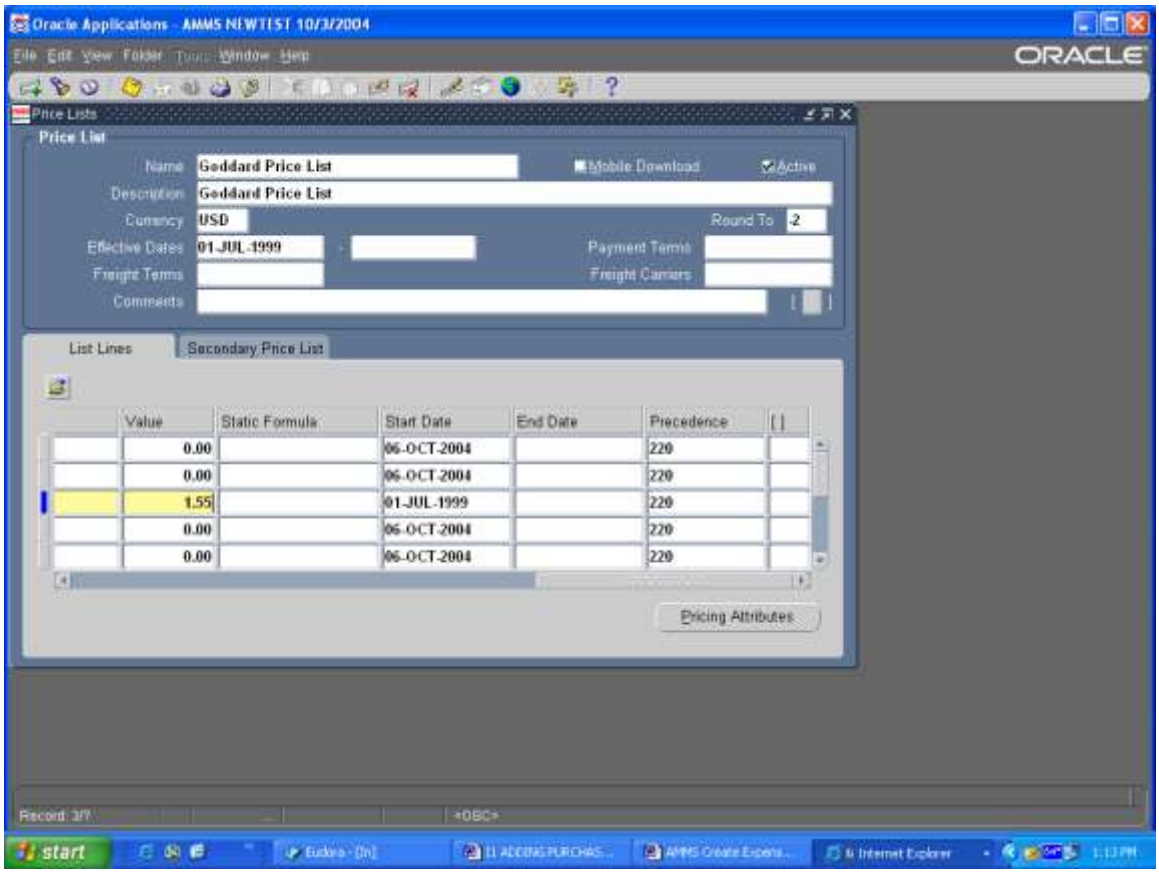
Step Description: In the Item field click on the LOV and select Item from the list, tab to the Product Attribute field and click on the LOV and select Item Number from the list. In the Product Value field enter the Item number you just loaded.

Expected Results/ Actions: All fields will be populated



Step Description: Tab over to the value field and enter the cost for the item. Example: 1.55

Expected Results/ Actions: Field will be populated with cost.



Step Description: Save your work and close all forms, **Repeat the same process for the Wallops Price List.**

Expected Results/Actions: Transactions Complete and Applies message at the bottom of screen, and will return to OM USER main menu.

This stock number is now loaded and on the Price List.

AMMS TRAINING SCRIPT

Cycle Count Entries

Purpose

The purpose of this training script is to give instruction on how to enter counts for items being cycle counted.

Audience

Material Coordinators and Supply Technician Team Leads

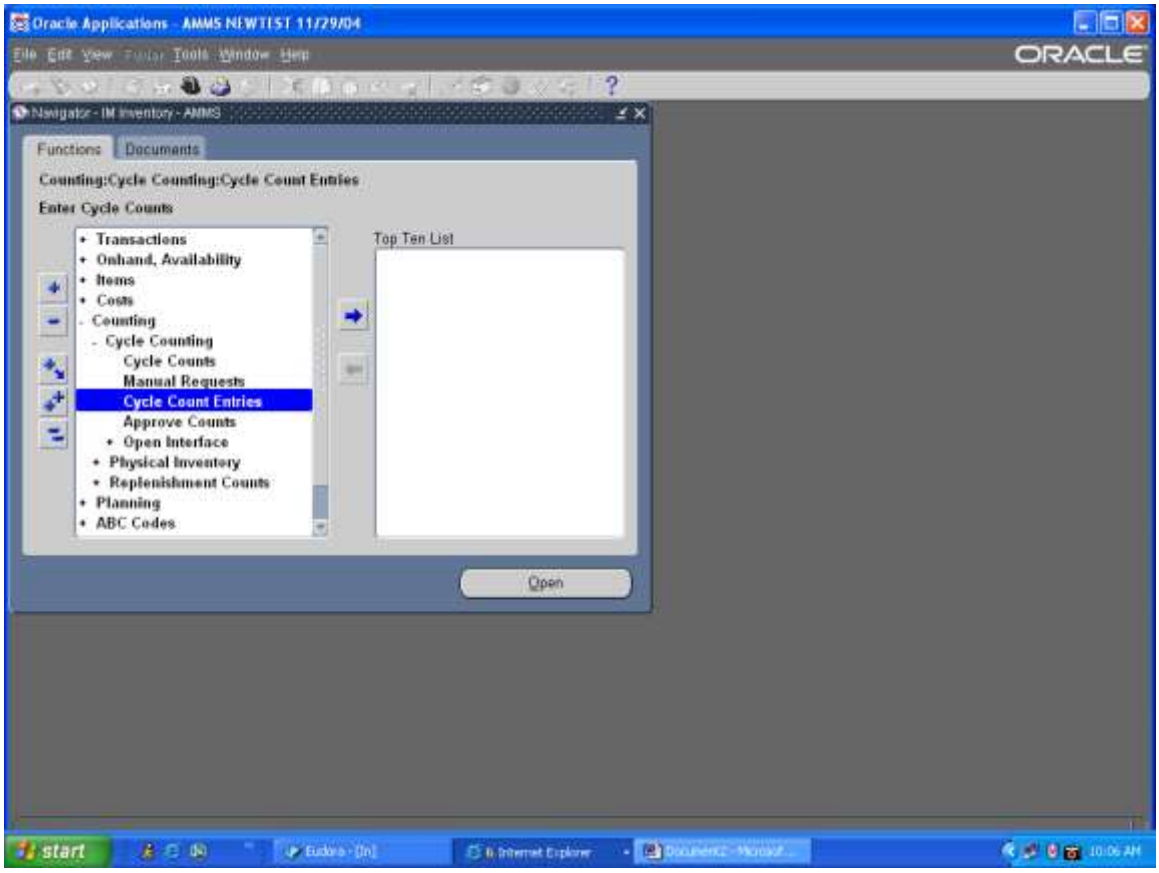
Prepared By	Theresa Coulson
Creation Date:	09/29/2004
Document Name	Cycle Count Entries.doc
Version	3
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Inventory.	

Step Description: Sign onto Oracle and choose the IM Inventory AMMS responsibility

Expected Results: You will be at the IM Inventory AMMS main menu

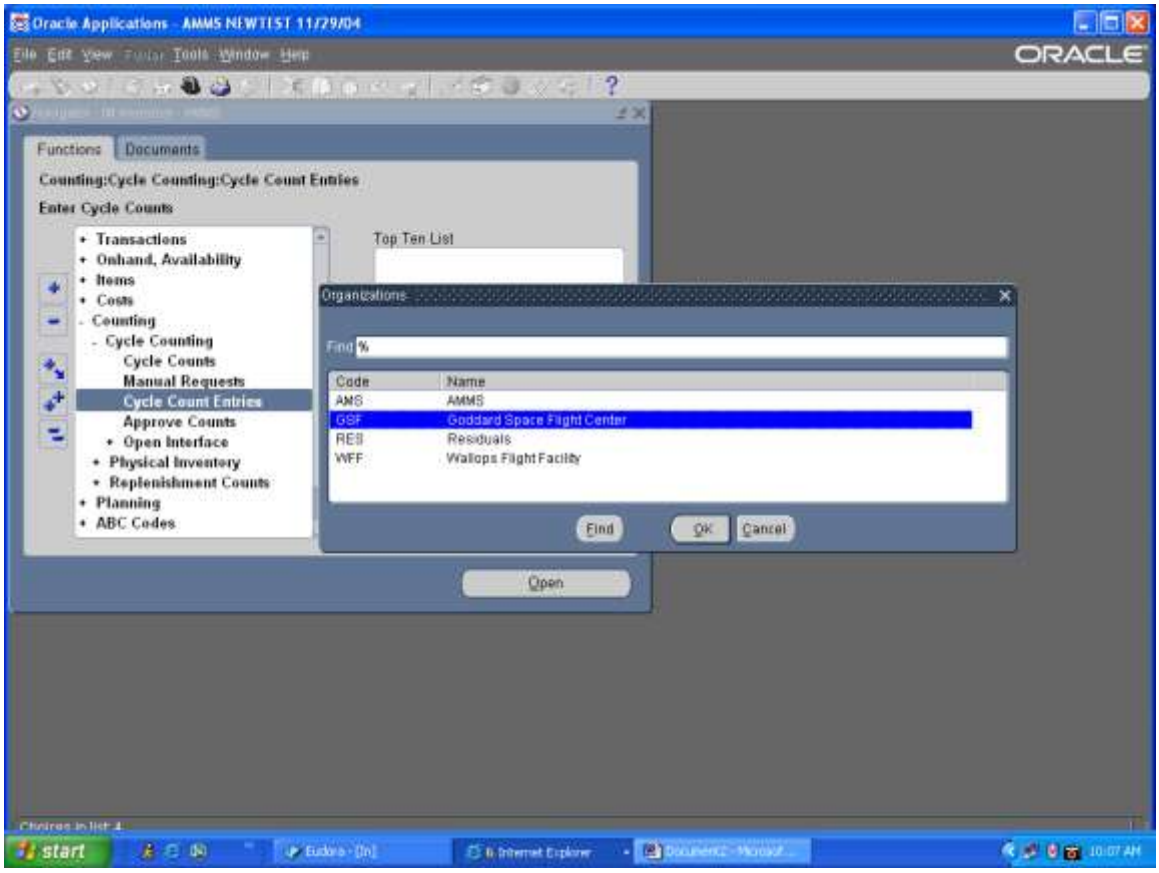
Step Description: From the IM Inventory AMMS main menu select Counting > Cycle Counting > Cycle Count Entries

Expected Results: The Organization window will appear



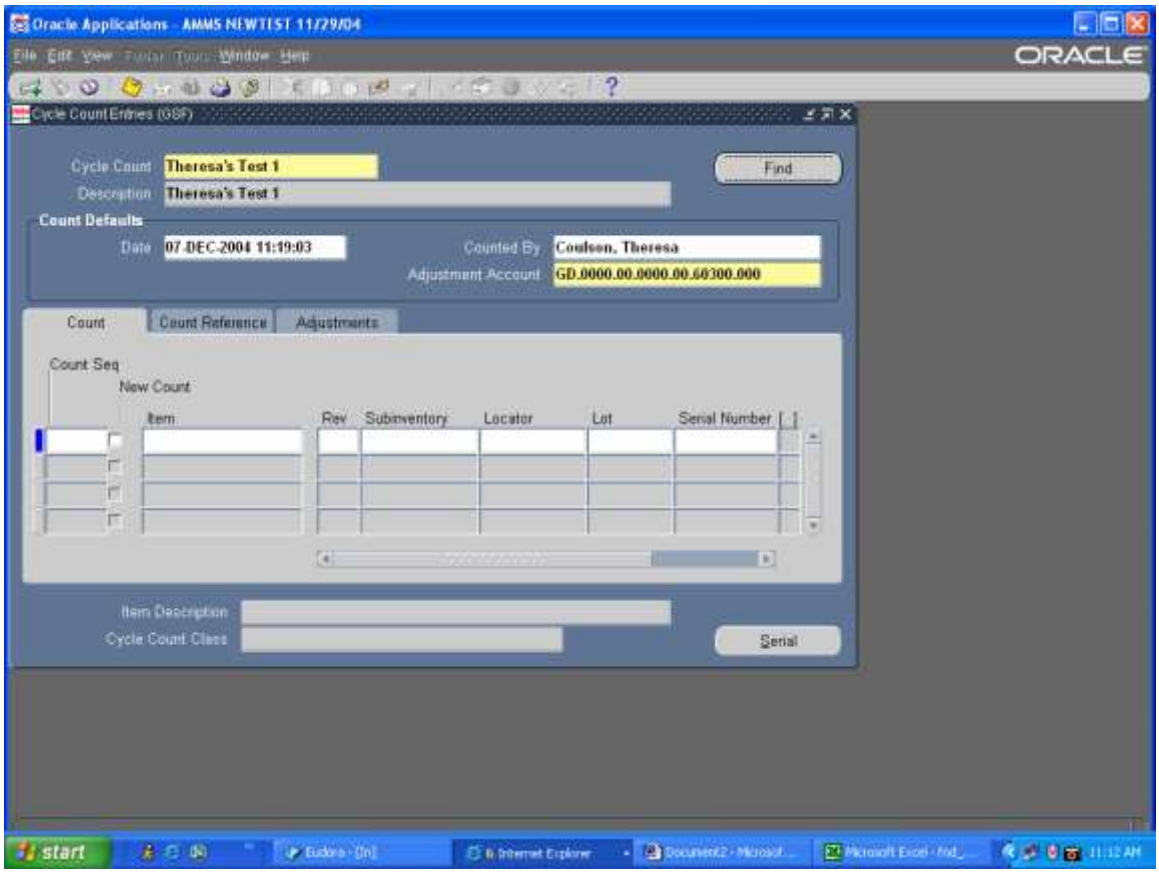
Step Description: From the Organizations window select the appropriate organization, GSF for Goddard or WFF for Wallops.

Expected Results: Cycle Count Entries window will open



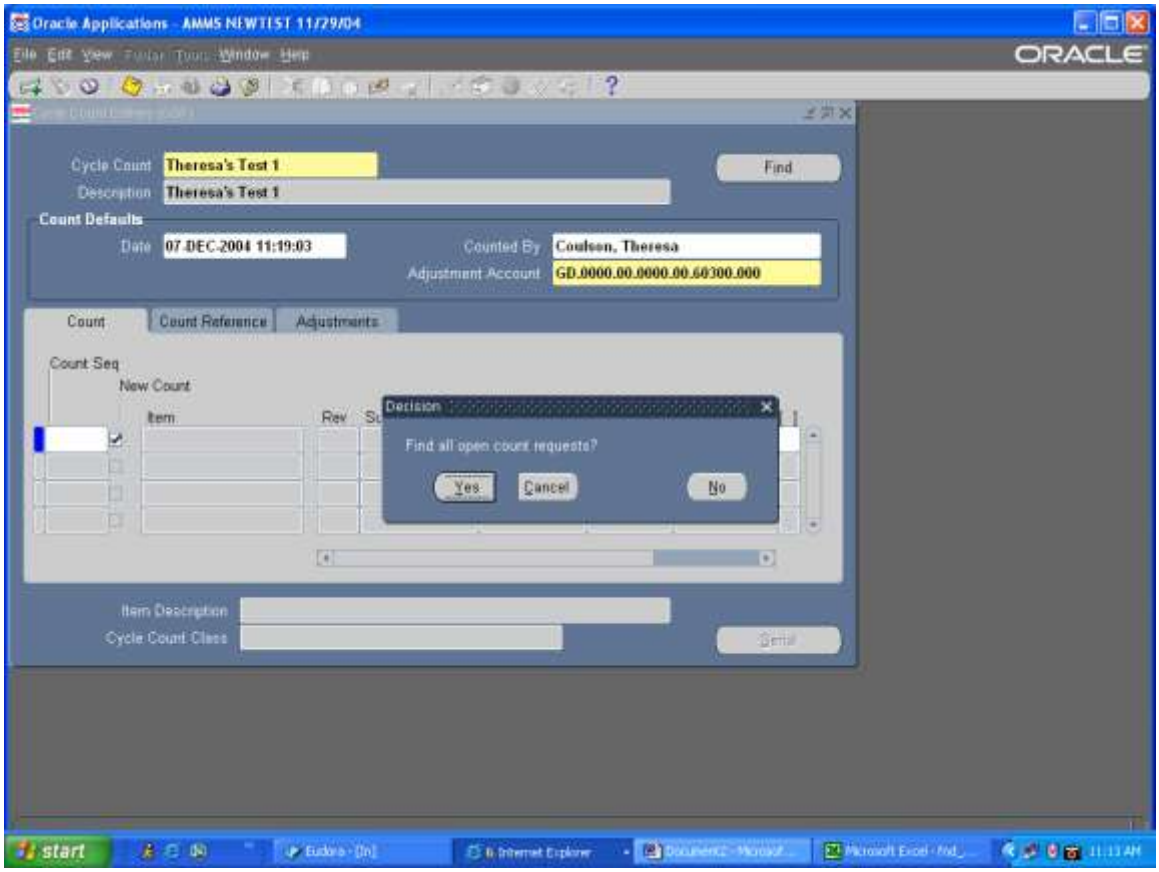
Step Description: In the Cycle Count field click on the LOV and select the name of the Cycle Count that you are performing. Then click on the Find Button. The name of the cycle count will be on the count card report.

Expected Results: A decision window will appear



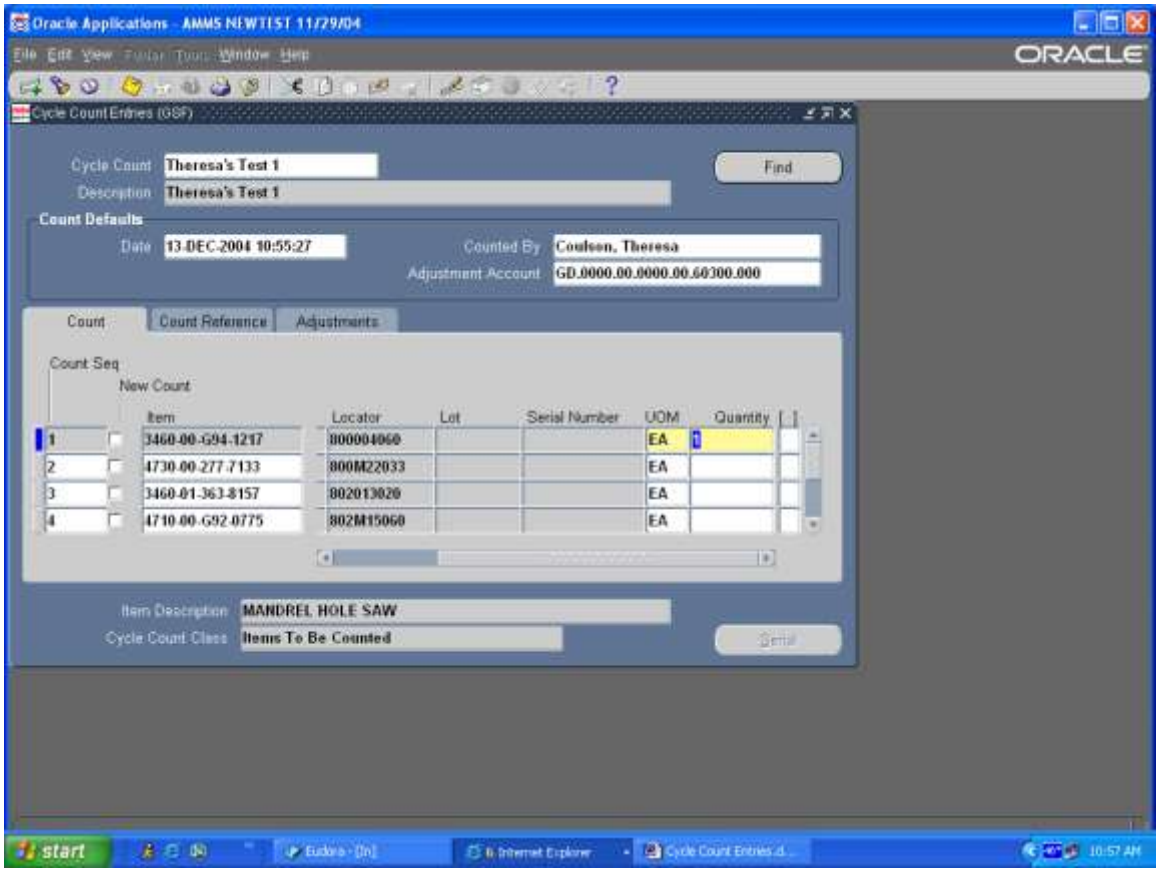
Step Description: At the Decision window, “Find all open count requests?” click on Yes

Expected Results: Cycle Count Entries form is populated with count card information



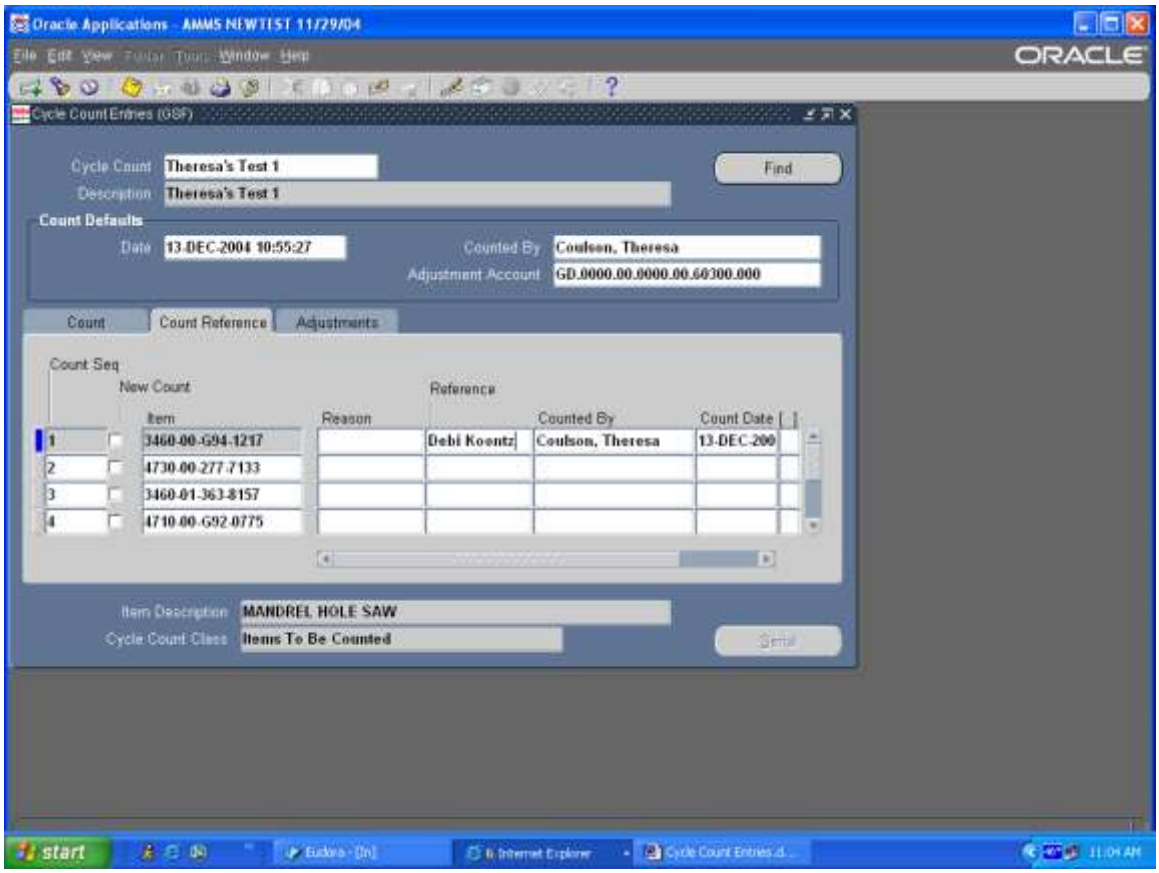
Step Description: Identify the items that you need to enter counts for. You can do this by Count Sequence number and by Item Number. Tab over to the Quantity field, enter the first count quantity. For Recounts, the quantity will already be populated in the field, you must type the quantity again, or the count will not be registered.

Expected Results: Quantity field will be populated



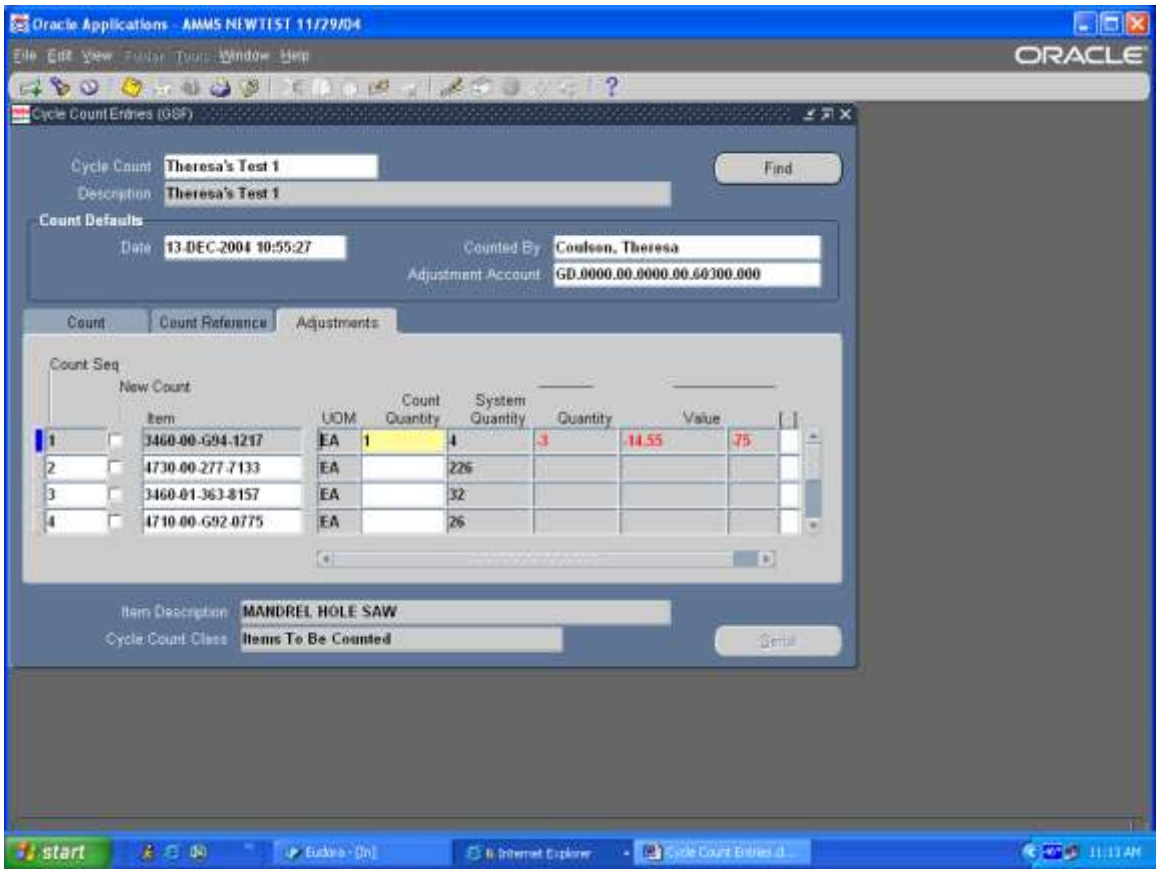
Step Description: Tab to the Reference field, this is a free formed field, in this field enter the name of the person that conducted the counting. Do this for first counts and recounts.

Expected Results: Field will be populated with person's name



Step Description: For Reference only if you continue to tab you will see what the count quantity, verse the System quantity, and be able to see the difference. This is just a reference tool, there is no data to be entered.

Expected Results: You will see data



Step Description: Save your work.

Expected Results: Transactions complete.

Notes: When entering Cycle Counts, you will do this multiple times for items depending on the number of recounts requested. Once you have entered the "Final" count for an item the items that the balances need to be adjusted will require you to "Approve" the counts.

AMMS TRAINING SCRIPT

Finding Cost for Miscellaneous Transactions

Purpose

The purpose of this training script is to will identify what the cost needs to be when doing any Miscellaneous transaction (including Excess)

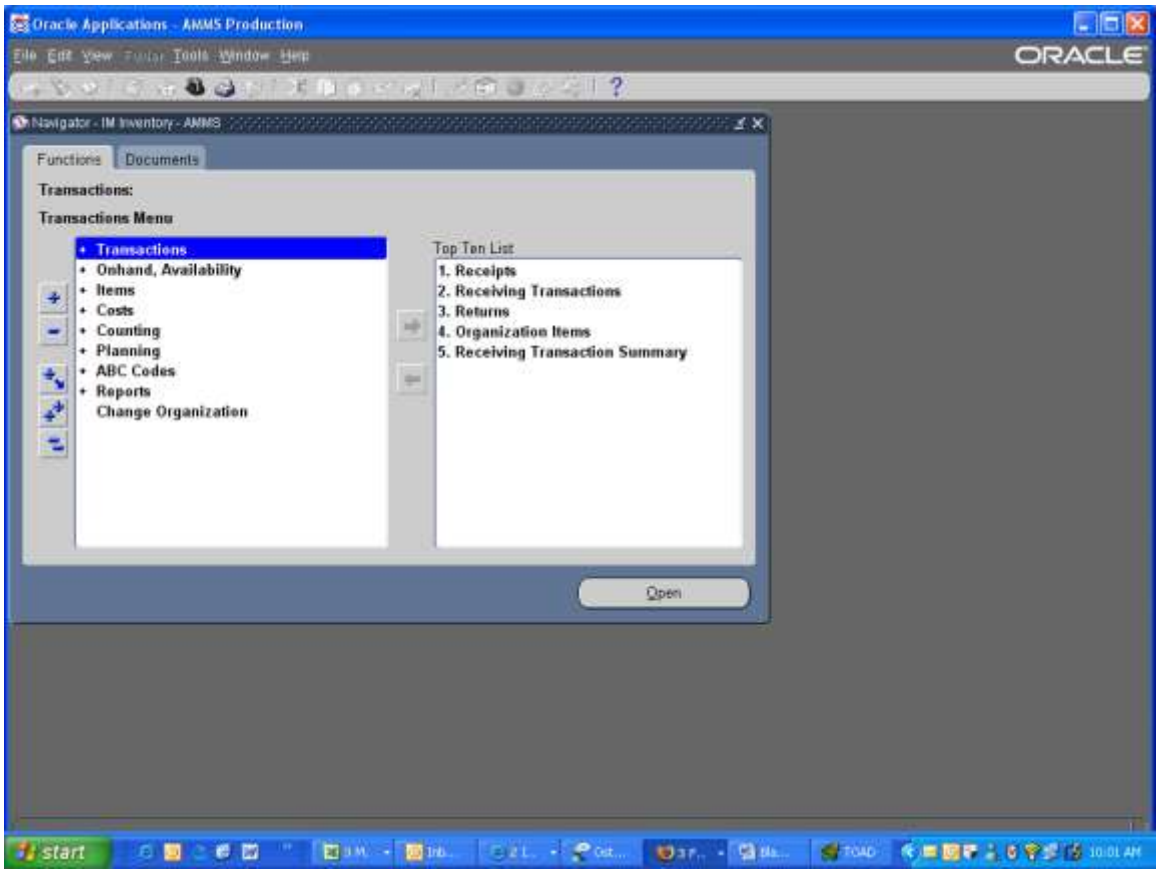
Audience

Material Coordinator

Prepared By	Theresa Coulson
Creation Date:	05/22/2008
Document Name	Find Cost of Item to do Miscellaneous Transactions.doc
Version	x
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Inventory.	

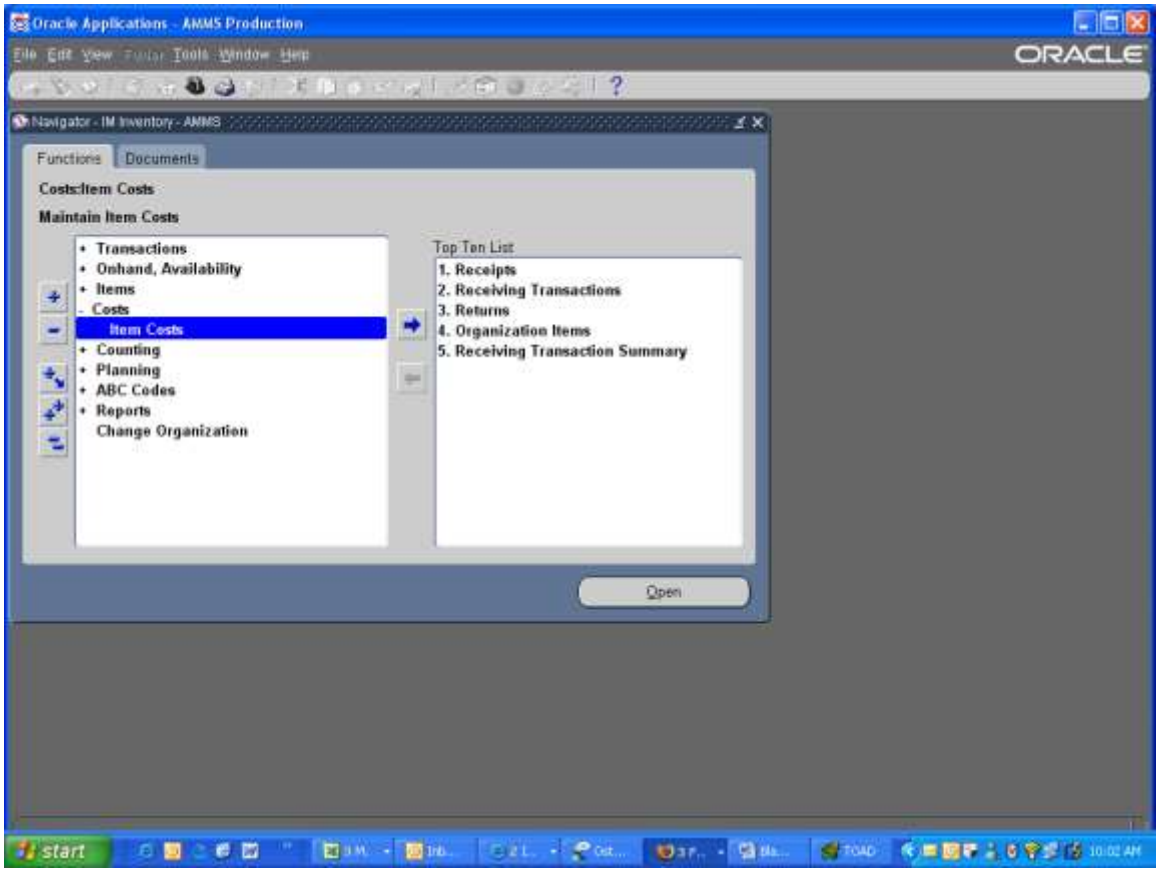
Step Description: Sign onto Oracle and select IM Inventory AMMS responsibility

Expected Results: IM Inventory AMMS main menu will appear



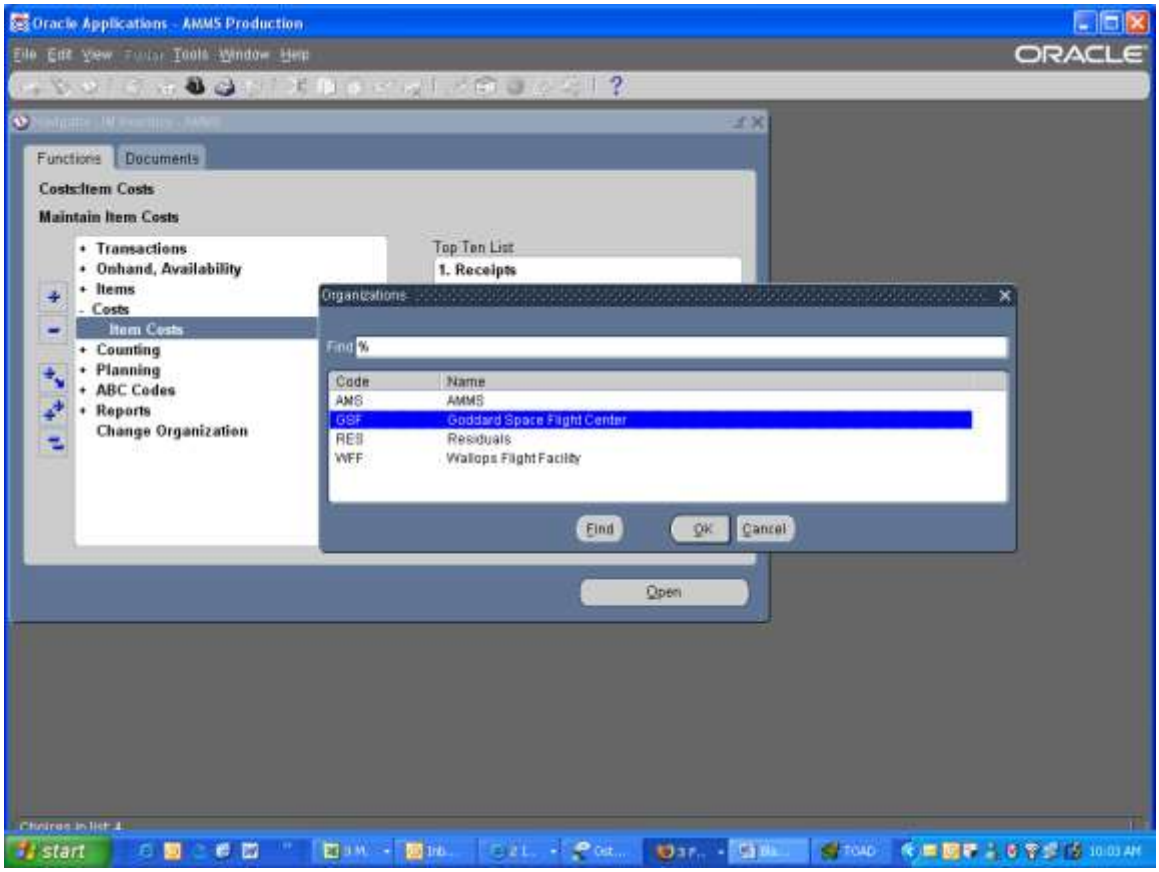
Step Description: From the IM Inventory AMMS main menu select Costs > Item Costs

Expected Results: Organization window will appear



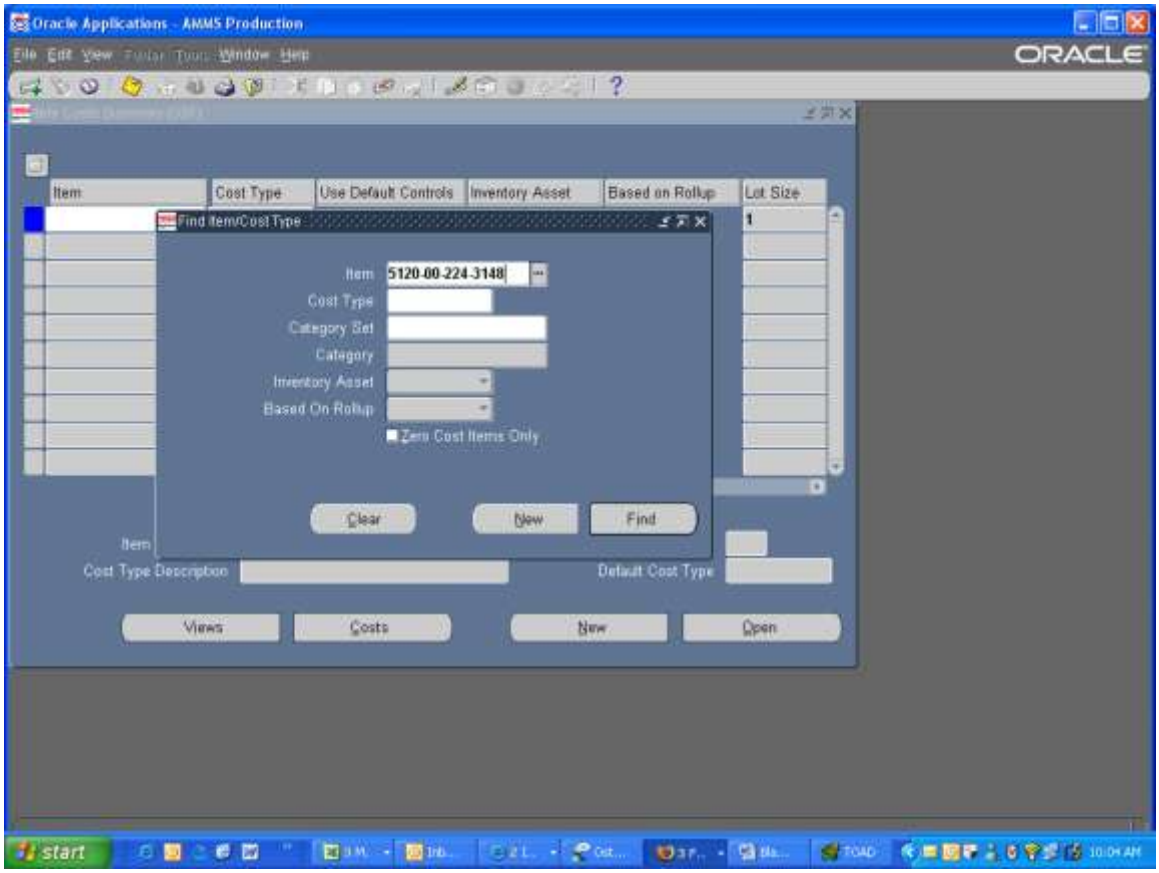
Step Description: Select the appropriate organization

Expected Results: Find Item/Cost Type window will appear



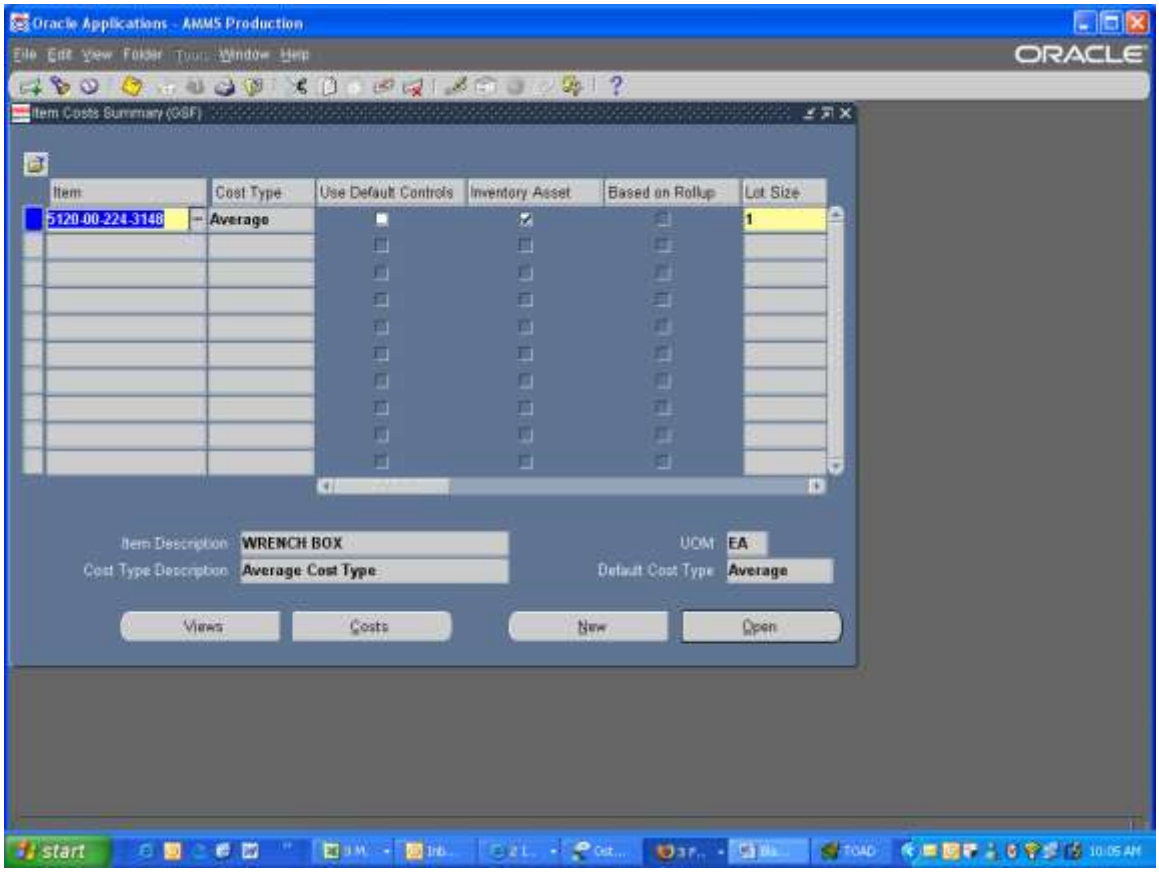
Step Description: In the Find Item/Cost Type window in the Item field enter the item number you want to do the adjustment for, click on Find

Expected Results: Item Cost Summary Window will appear



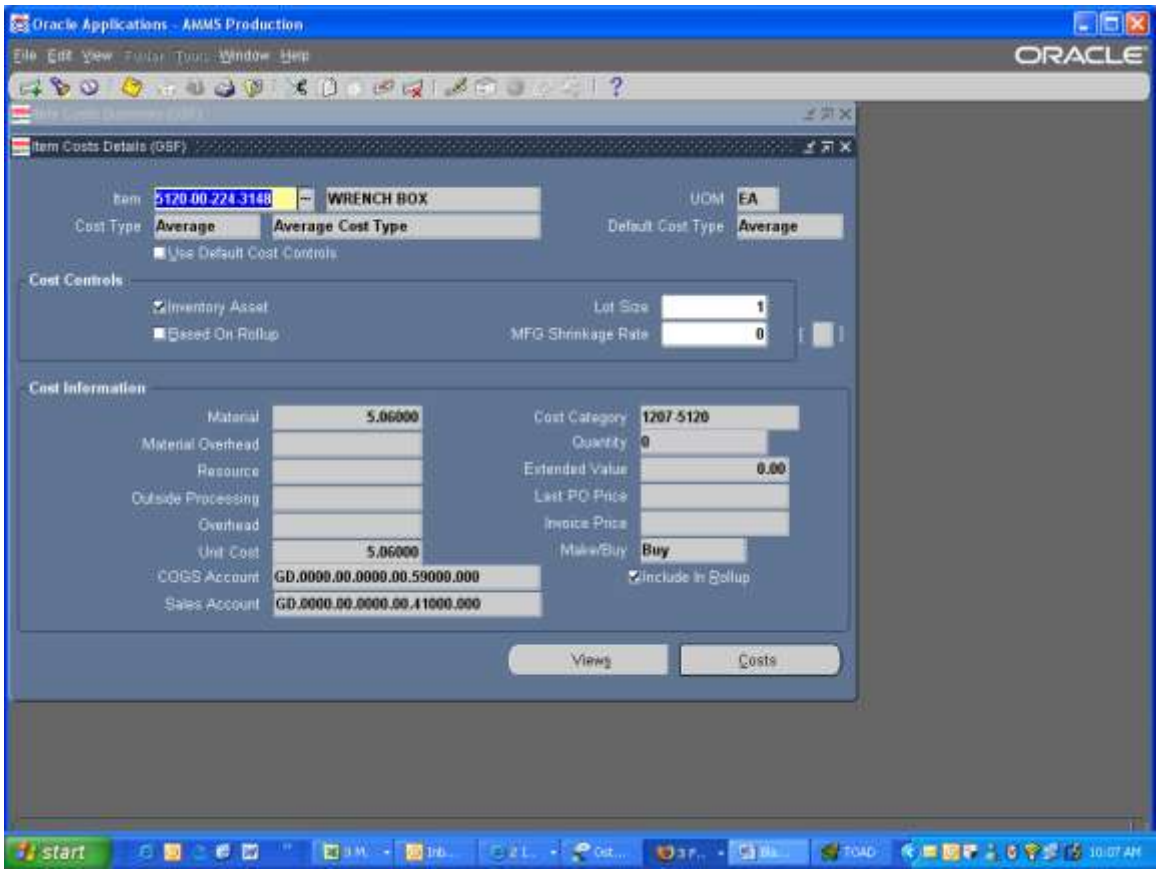
Step Description: At the Item Cost Summary window click on Open

Expected Results: Item Cost Details window will appear



Step Description: In the Cost Information section of the Item Cost Details window you will see the **Material** field this is the cost that should be used when doing any miscellaneous transactions.

Expected Results: You will now have the correct cost for the item



Note: The cost in the Material field will be the cost that you enter when doing any Miscellaneous Transactions, including Excess transactions.

AMMS TRAINING SCRIPT

Inquiry by Part Number

Purpose

The purpose of this training script is to walk you though doing a query in AMMS to see of a Part Number has an existing Item Number.

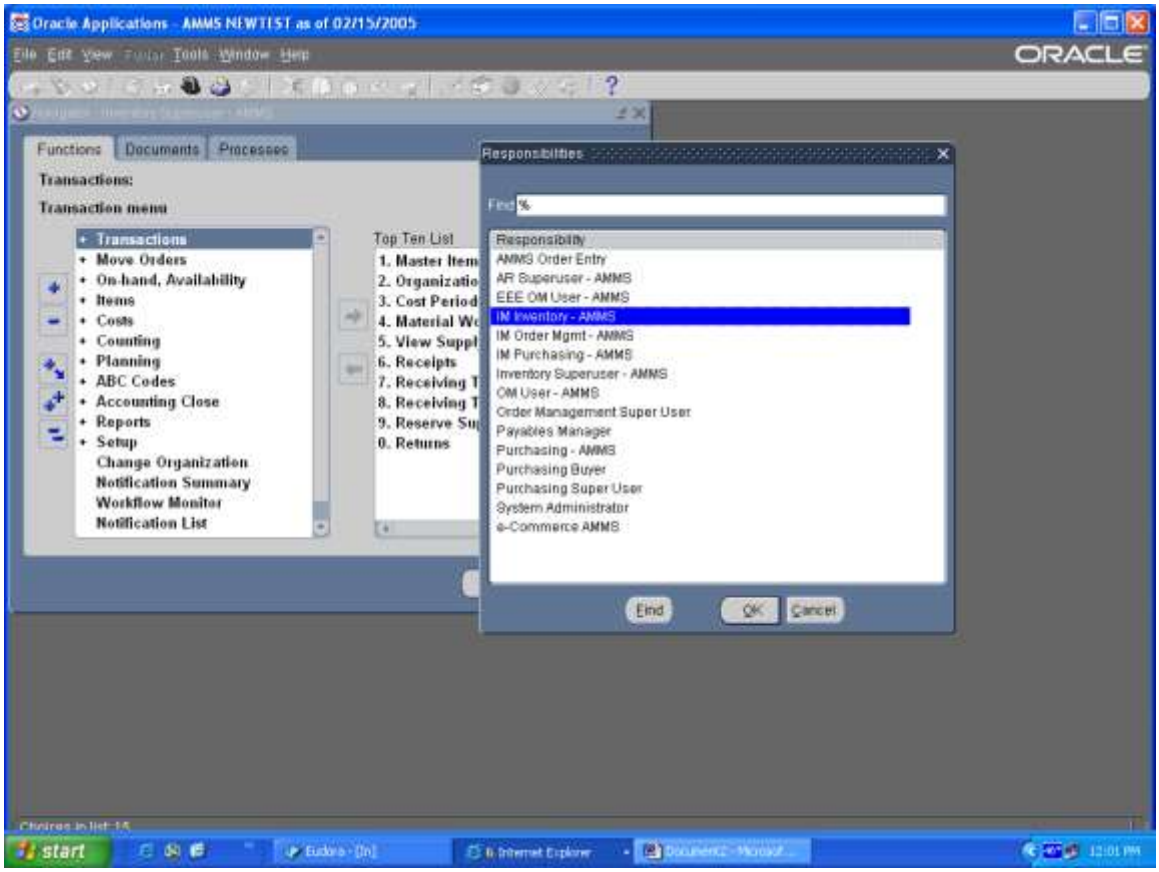
Audience

Supply Team Lead and Material Coordinator

Prepared By	Theresa Coulson
Creation Date:	03/28/2005
Document Name	Inquiry on Part Numbers.doc
Version	2
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Inventory.	

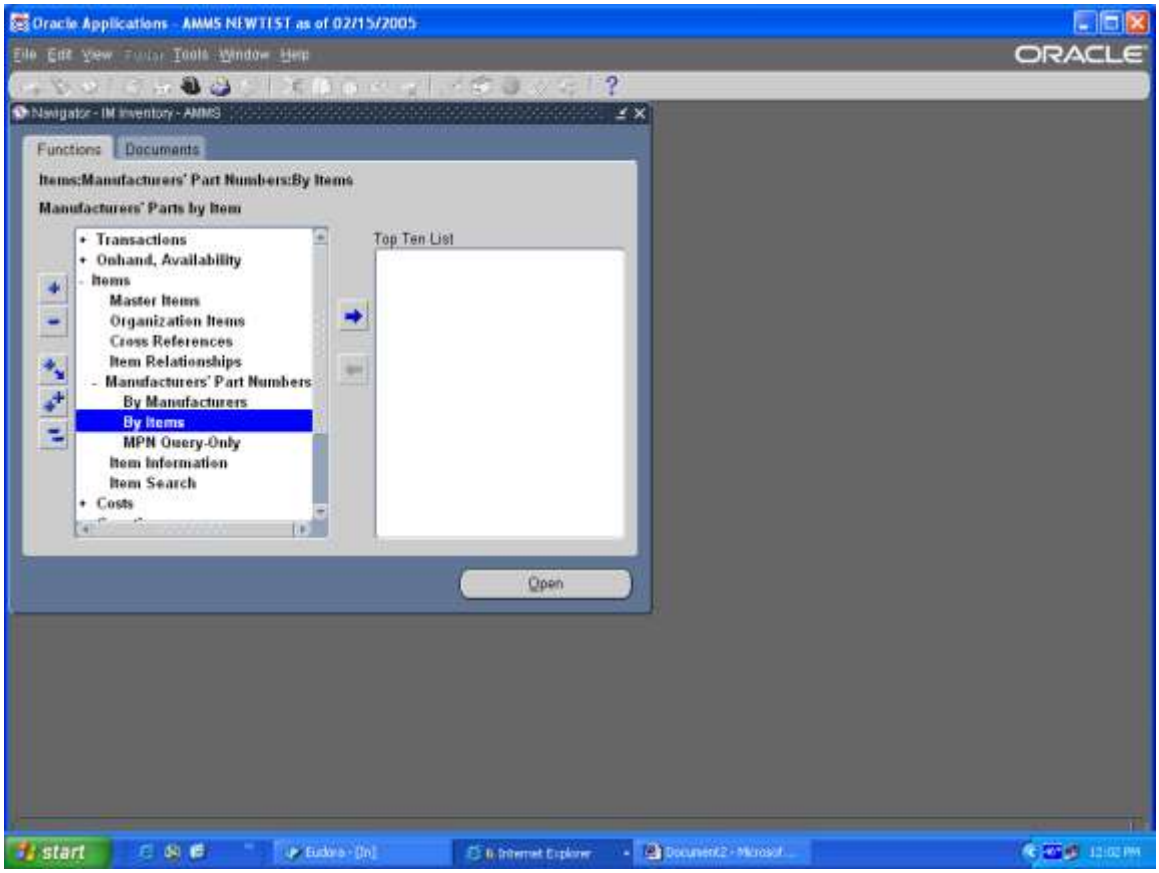
Step Description: Sign onto Oracle and select your IM Inventory AMMS responsibility

Expected Results: You will be at the IM Inventory AMMS main menu



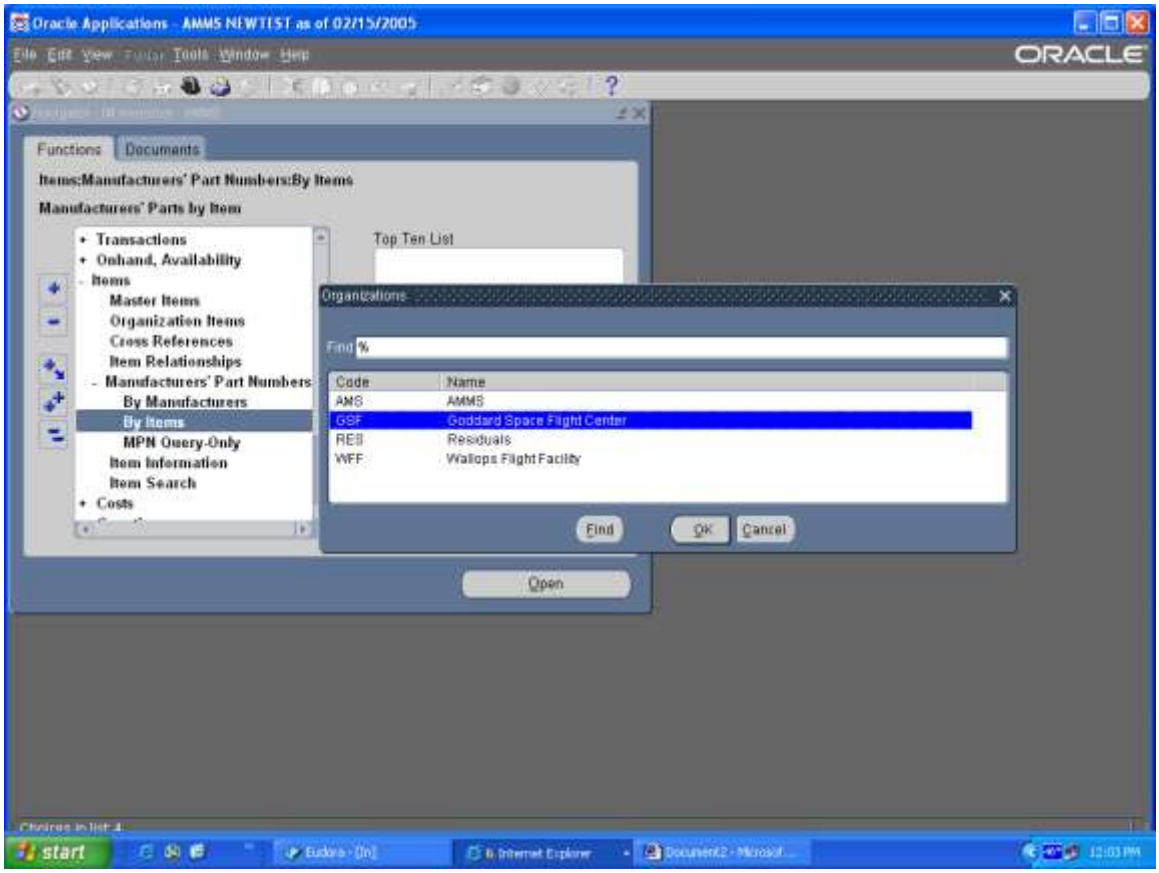
Step Description: From the main menu of the IM Inventory AMMS responsibility select Items > Manufactures Part Numbers> By Item, click on the open button

Expected Result: Organization window will appear



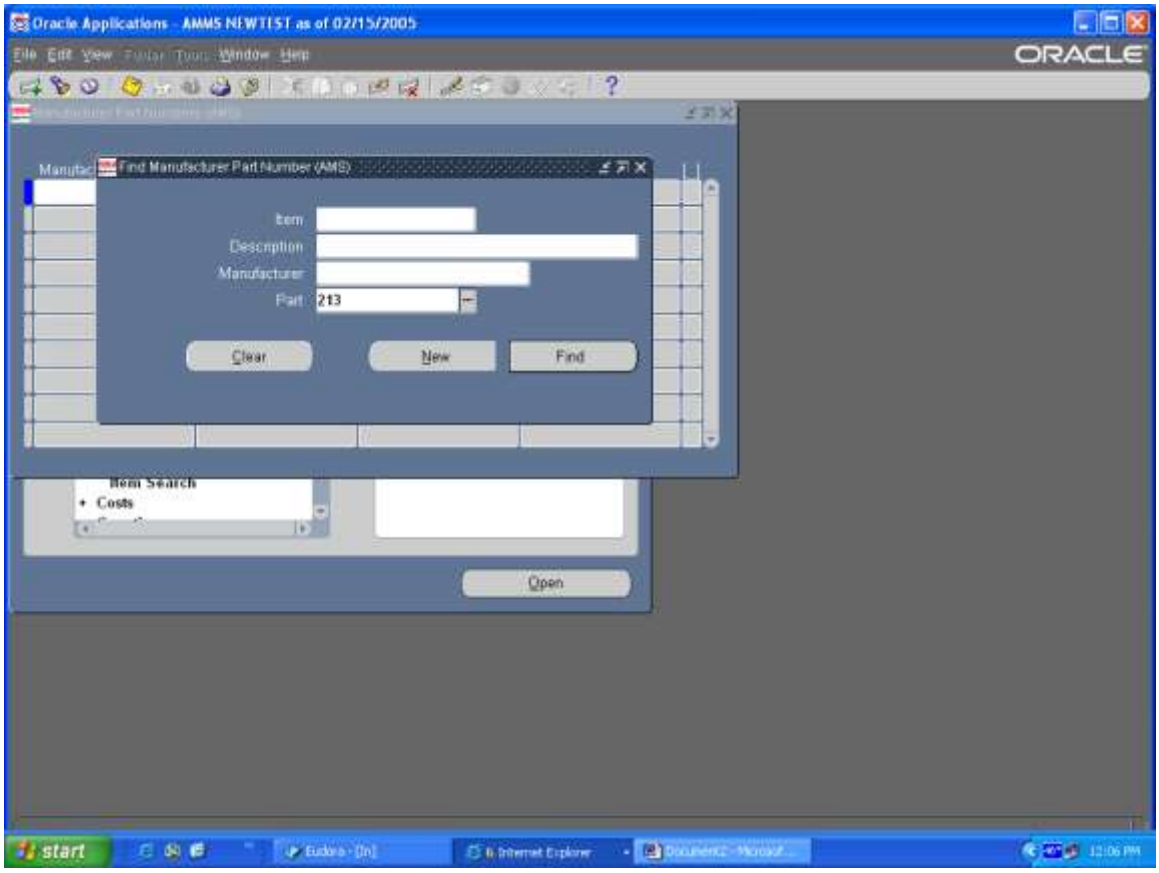
Step Description: From the Organization window select the appropriate organization, GSF is Goddard, WFF is Wallops, click OK

Expected Results: Find Manufacture Part Number window will open



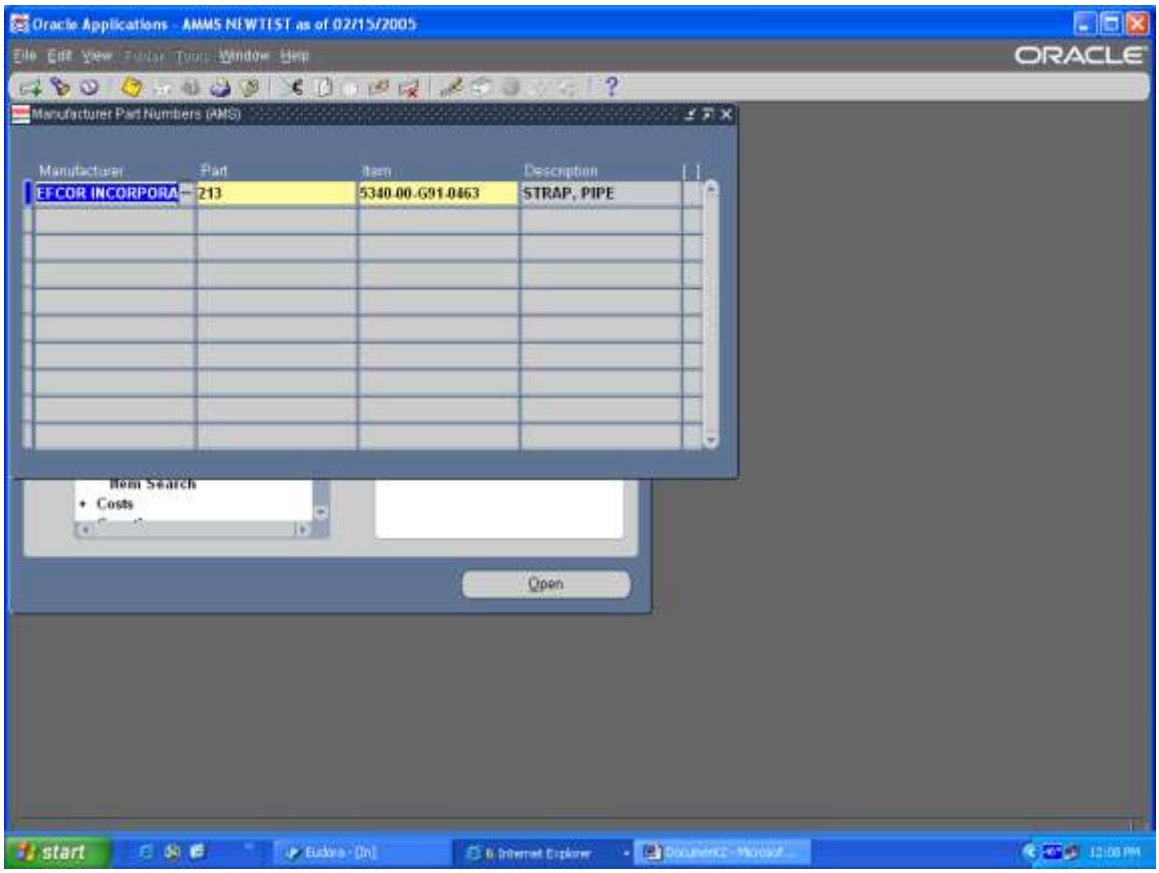
Step Description: Tab to the Part field and enter a part number, click on the Find button

Expected Results: The Manufactures Part Number window will appear with data



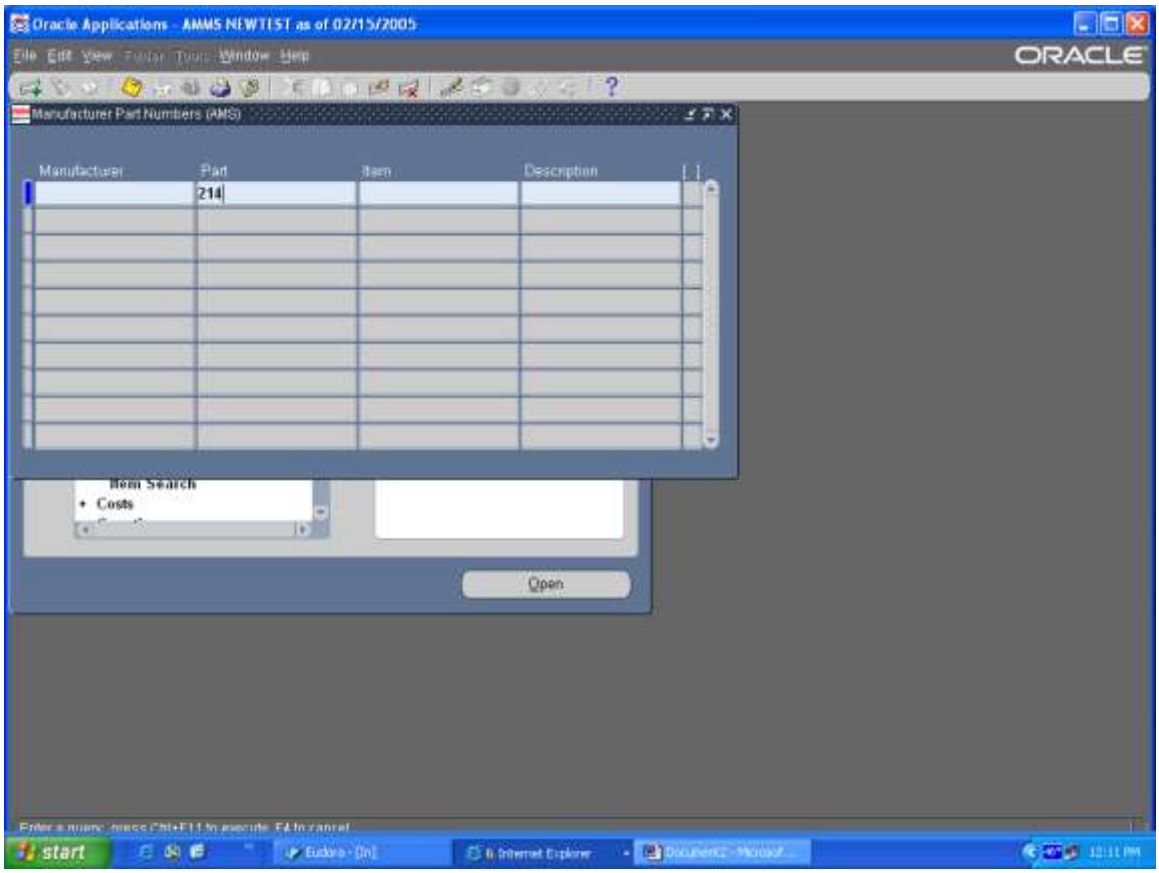
Step Description: If an item number is loaded for the part number the fields will be populated. This screen tells you who the manufacture is, what the part number is, what the item number is that is assigned to that part number, and what the name of the item is.

Expected Results: Review data



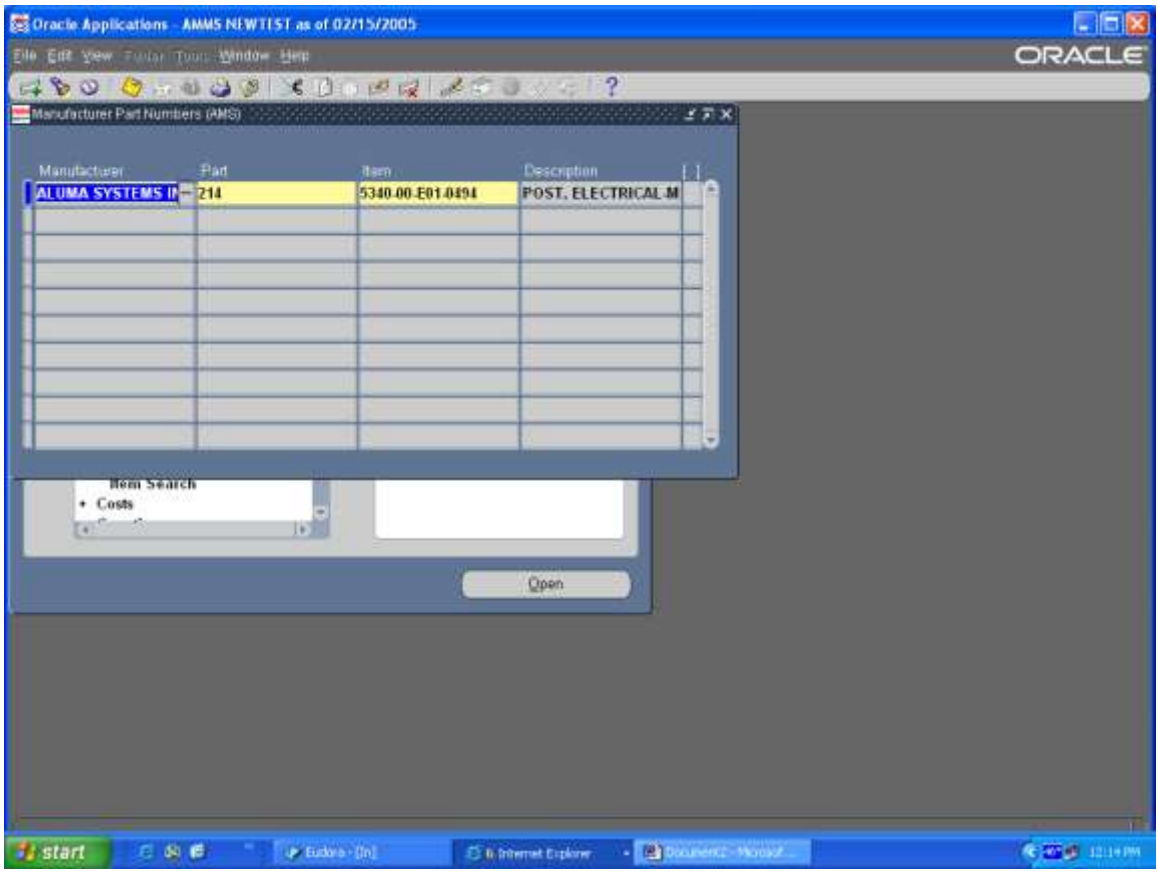
Step Description: Once you are in this screen if you need to look up addition part numbers, hit the F11 button on your keyboard, this will put Oracle into query mode, place the cursor in the Part field and enter the new part number.

Expected Results: Oracle will be in query mode and part field will be populated



Step Description: Hold down the Control (CTRL) button on your keyboard, then hit the F11 button again this will end the query mode in Oracle.

Expected Results: If an item is available for the part number you added data will populate



AMMS TRAINING SCRIPT

title

Purpose

The purpose of this training script is to give instruction on how to run the Item Demand History report, to find out usage on items.

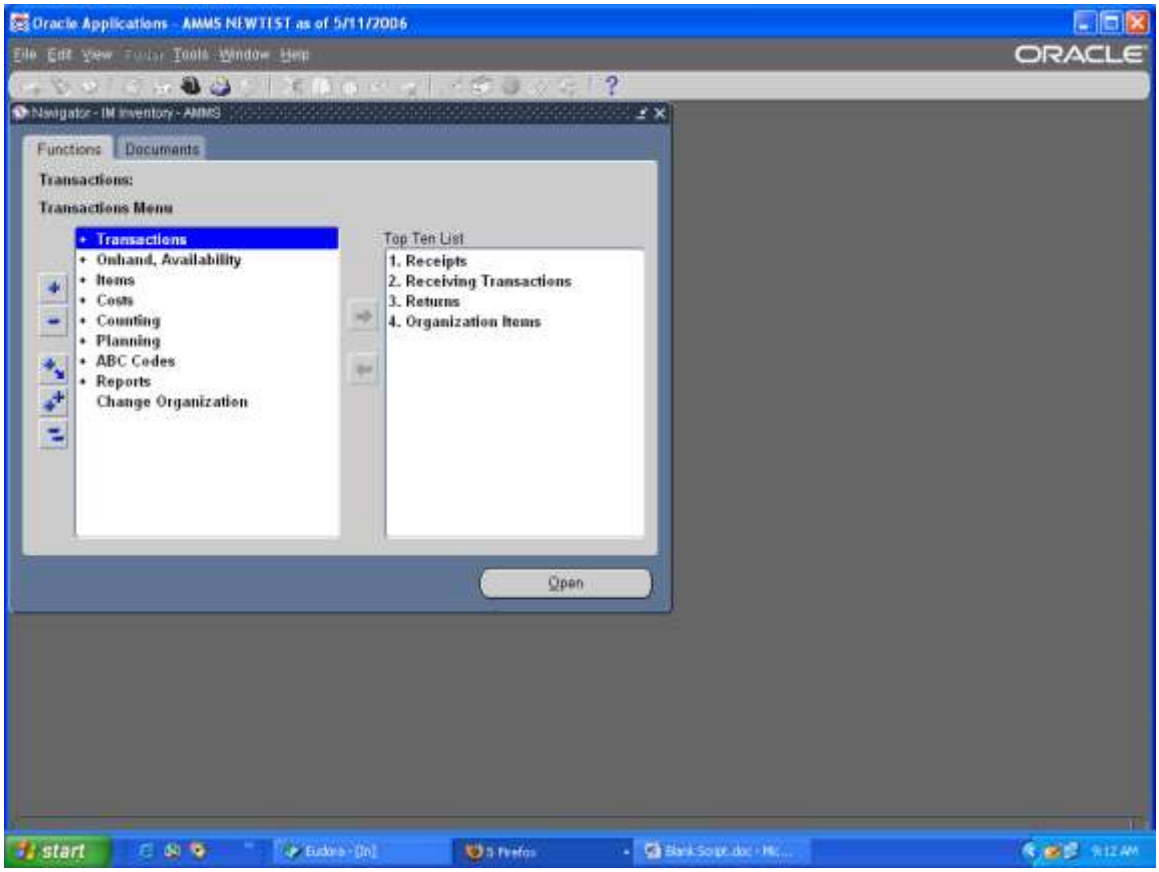
Audience

Material Coordinator

Prepared By	Theresa Coulson
Creation Date:	06/16/2006
Document Name	Item Demand History Report.doc
Version	2
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Inventory.	

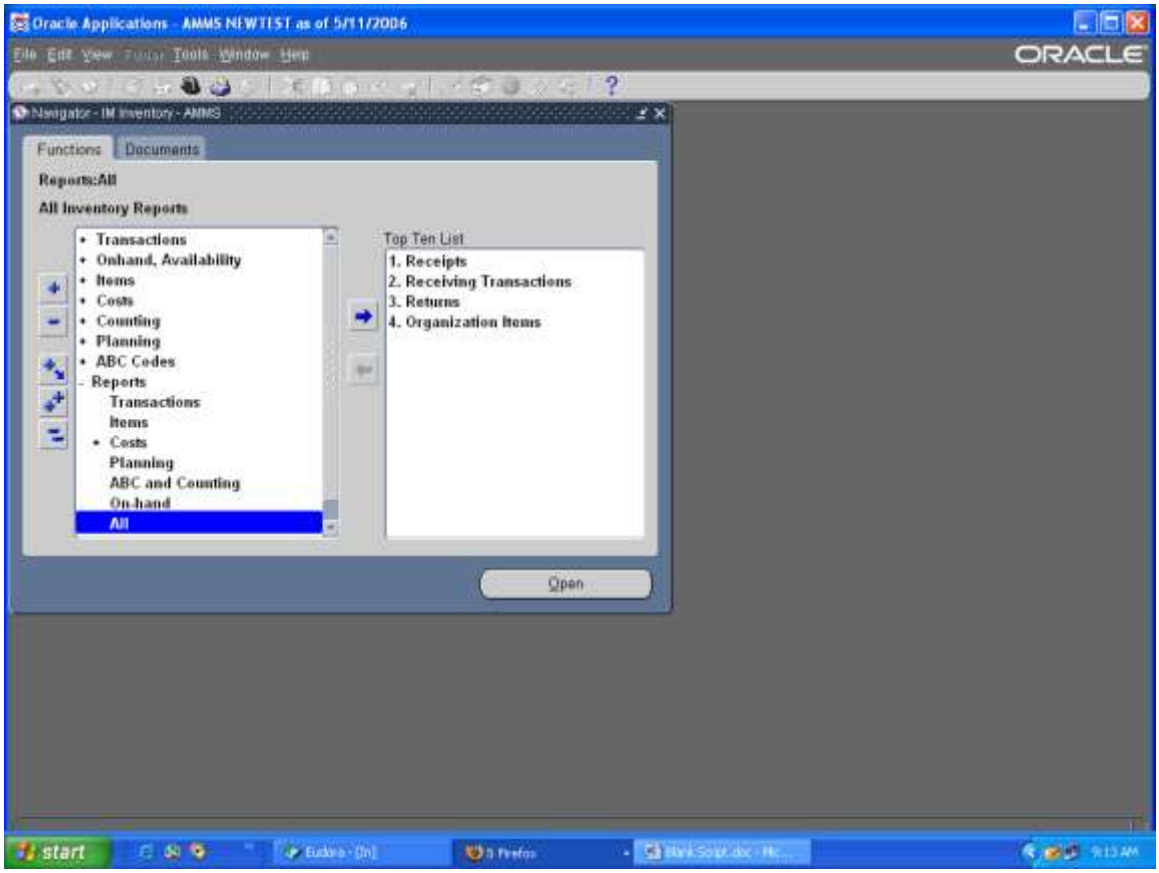
Step Description: Sign onto Oracle and select IM Inventory responsibility

Expected Results: IM Inventory main menu will appear



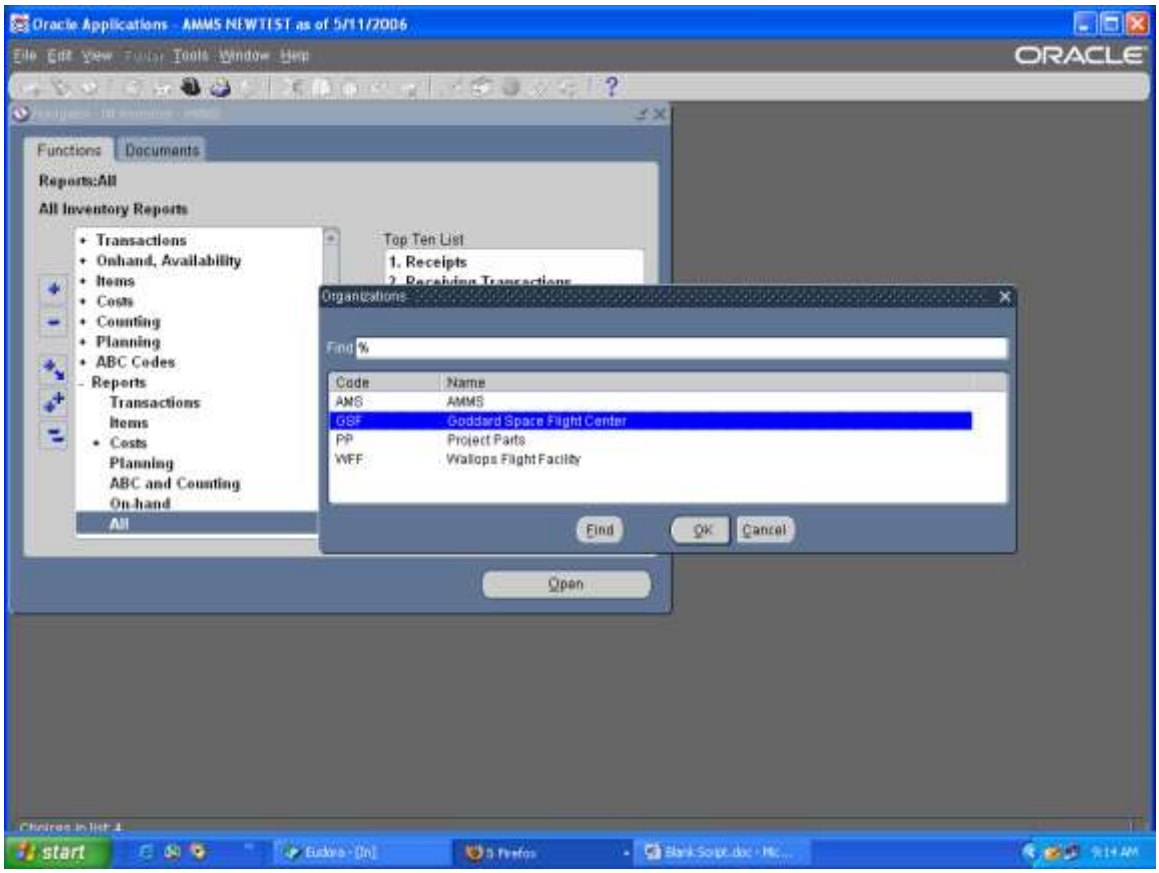
Step Description: From the IM Inventory main menu select Reports > All click on the Open button

Expected Results: Organization window will appear



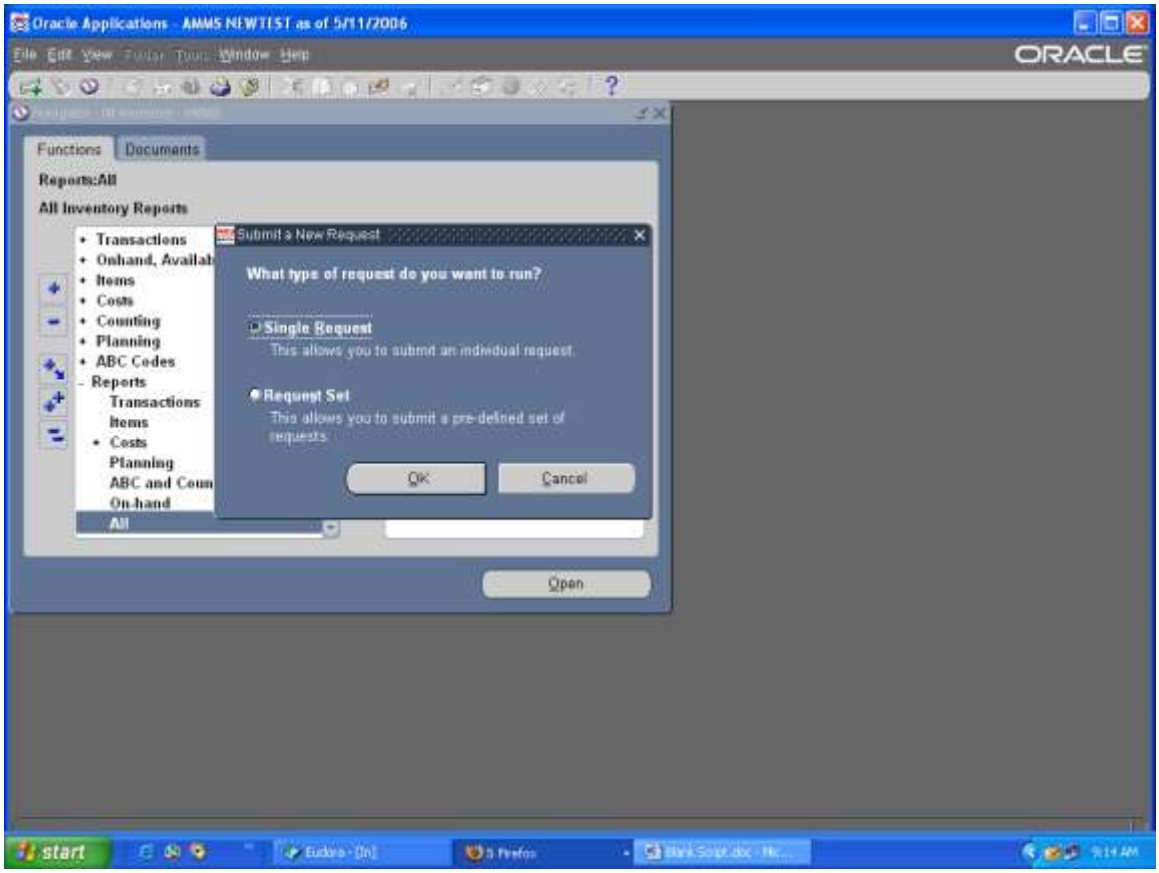
Step Description: In the Organization window select GSF for Goddard or WFF for Wallops

Expected Results: Submit New Request window will appear



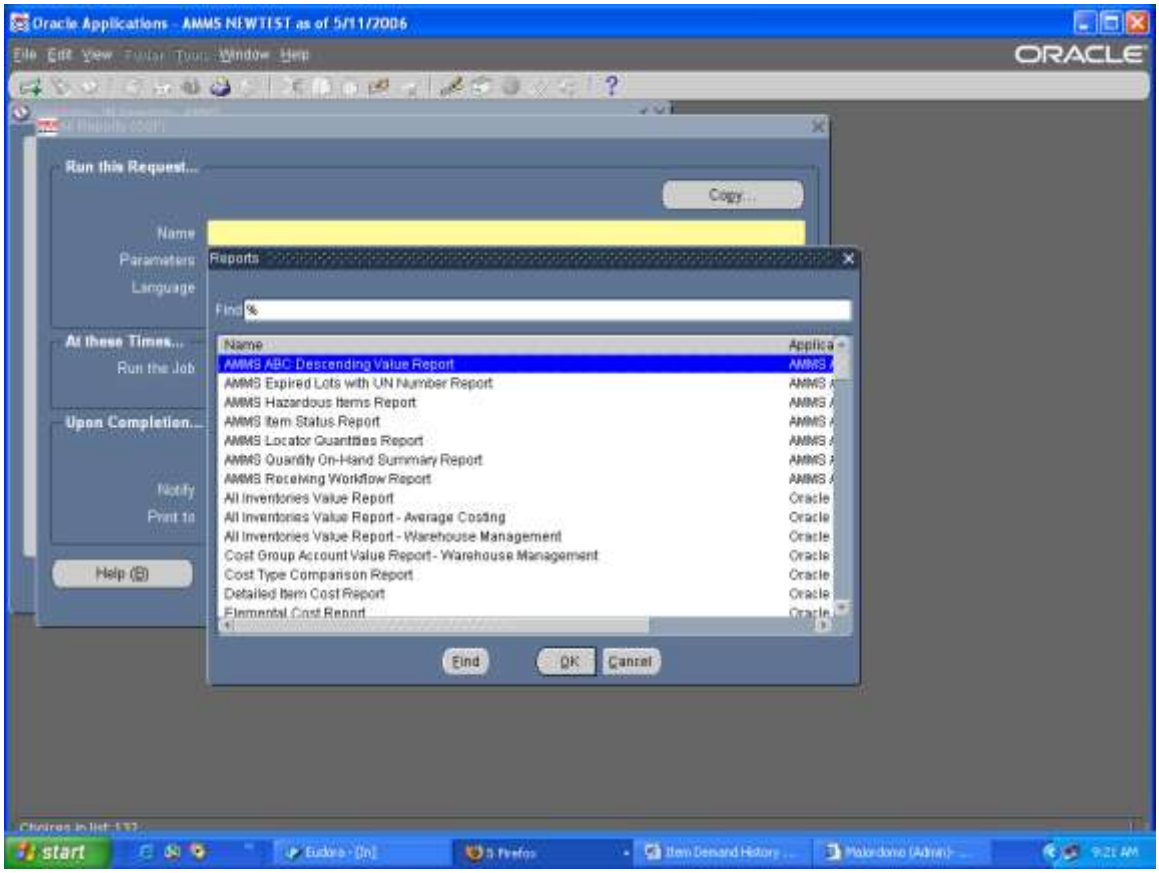
Step Description: From the Submit New Request window select Single Request, click OK

Expected Results: All Reports window will appear



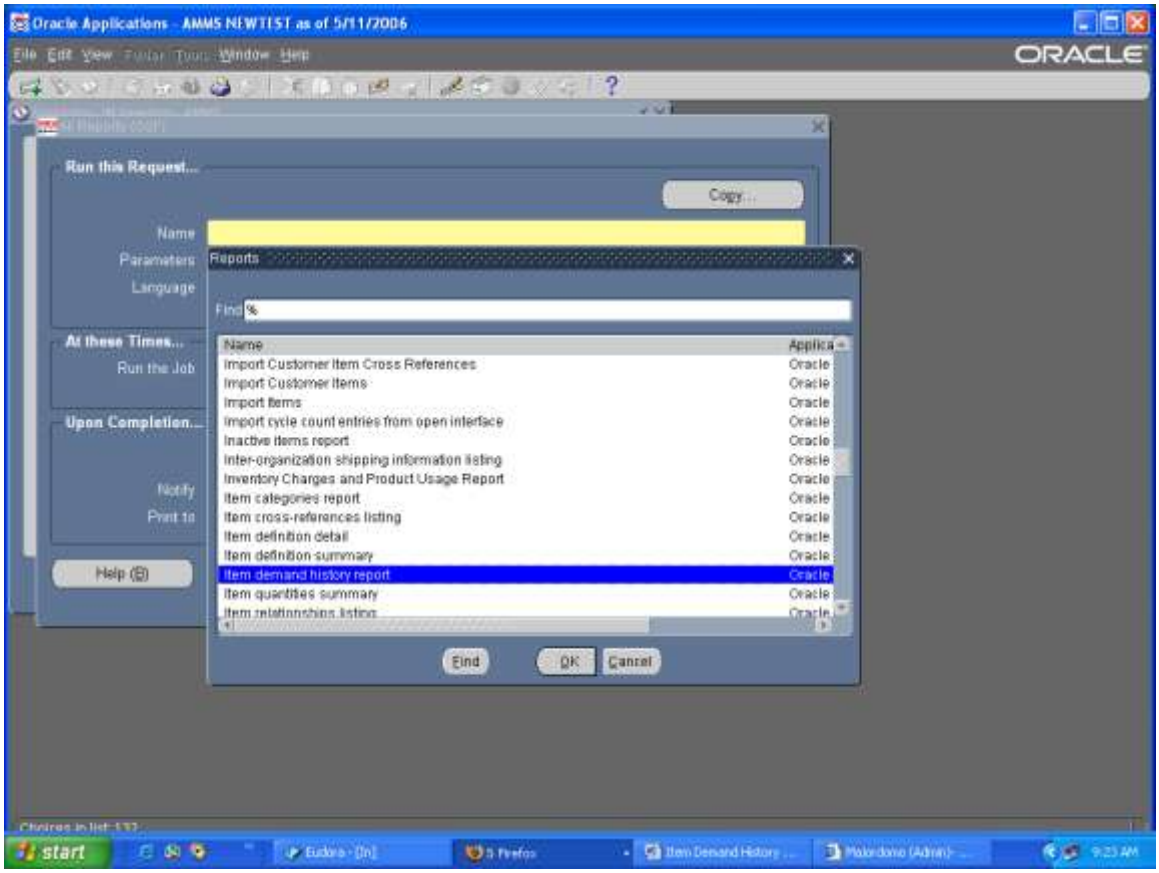
Step Description: In the All Reports window at the Name field click on the List of Values (LOV).

Expected Results: List of all reports will appear



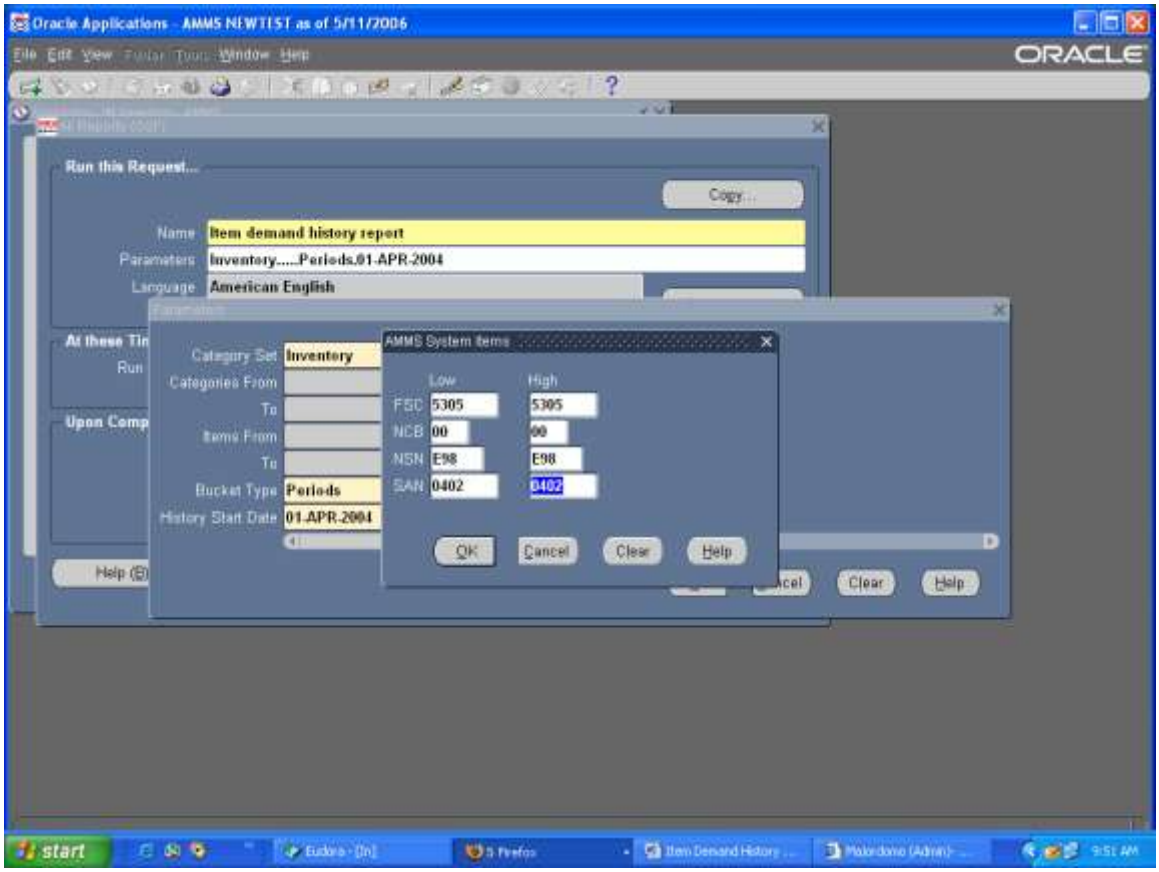
Step Description: Find the Item Demand History Report, the reports are in alphabetical order, once you find the correct report click OK to the Reports window

Expected Results: Parameters window will appear



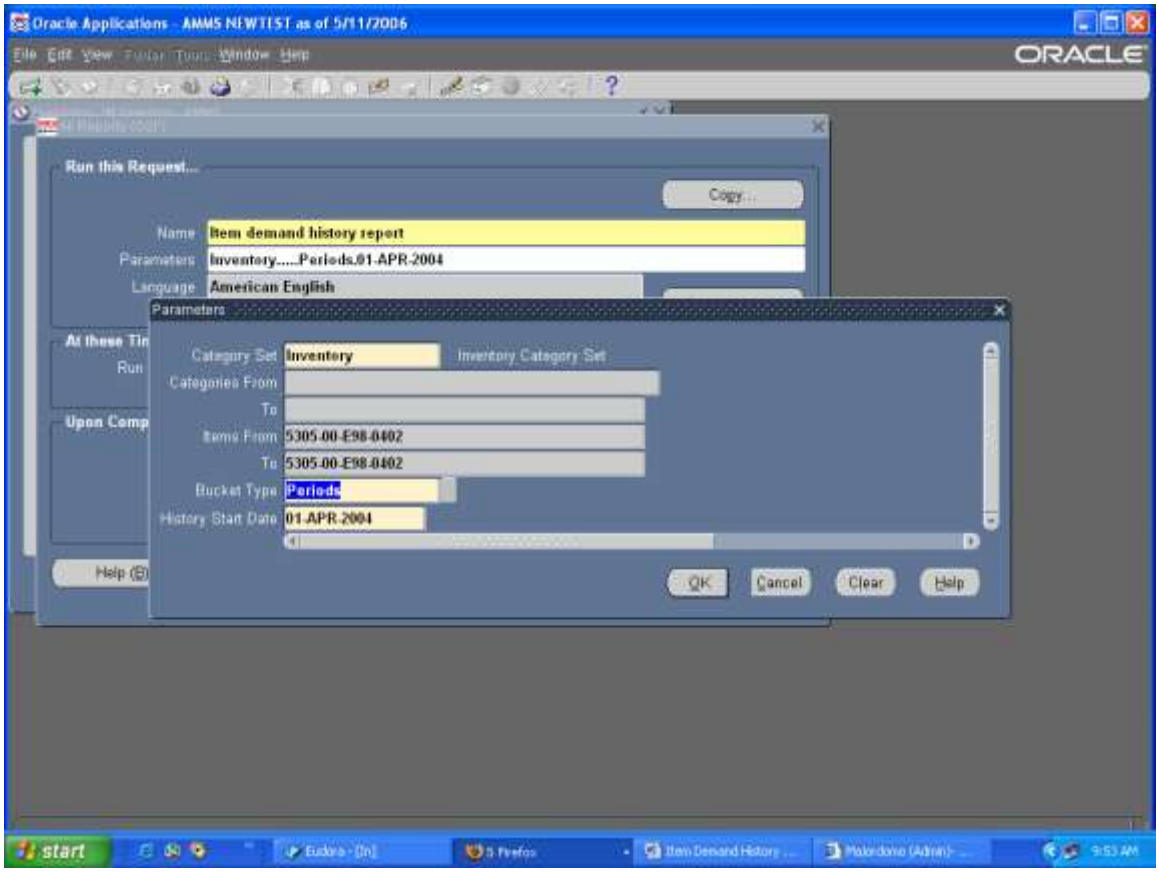
Step Description: In the parameters window, click in the Item From field, AMMS System Items window will appear, put the item number you want the report for in the Low and High fields, click OK to the AMMS System Items window

Expected Results: Both field will be populated with the same information, return to the Parameters window



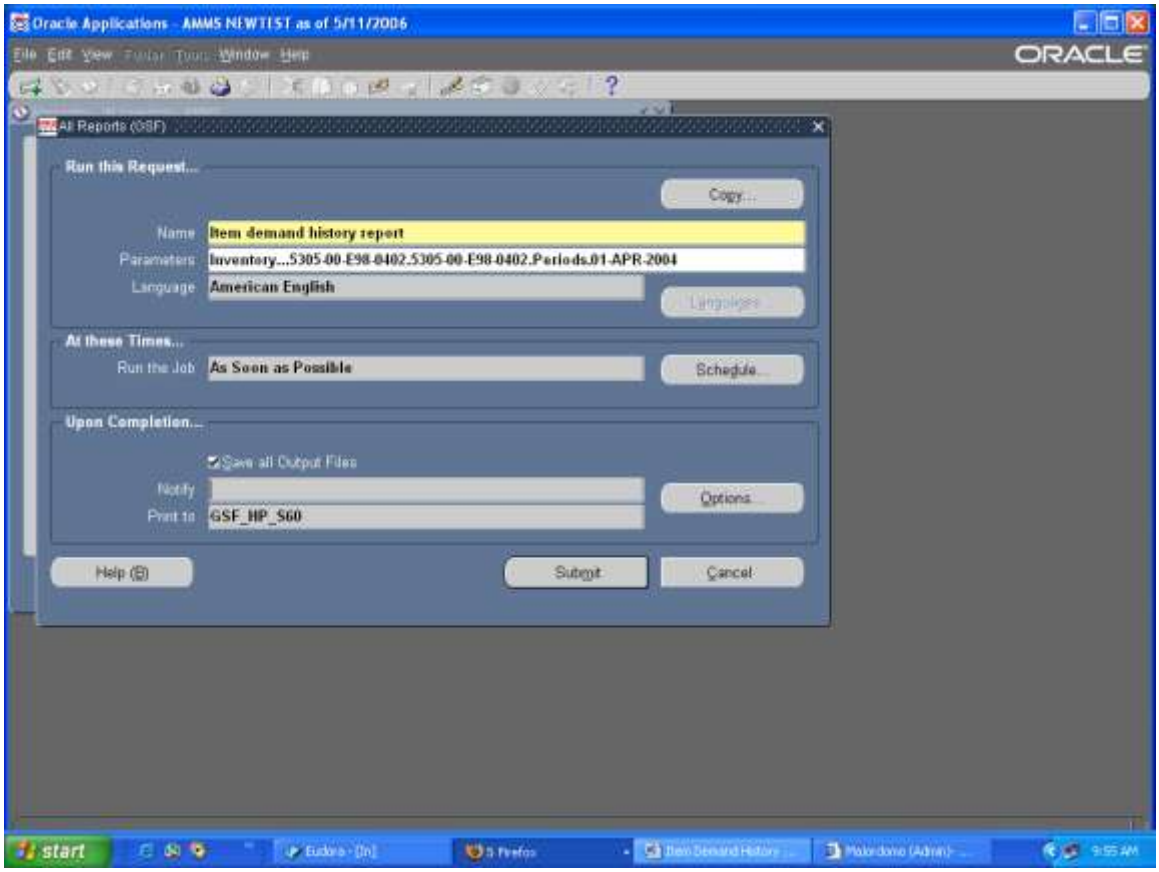
Step Description: In the Bucket Type window click on the LOV and select Periods, in the History Start Date field, enter the data that you want the history to go back to, if you want the history back to April 2004 you would enter 01-APR-2004 (this is the start date of our current version of Oracle), click OK to the parameters window

Expected Results: Return to the All Reports window



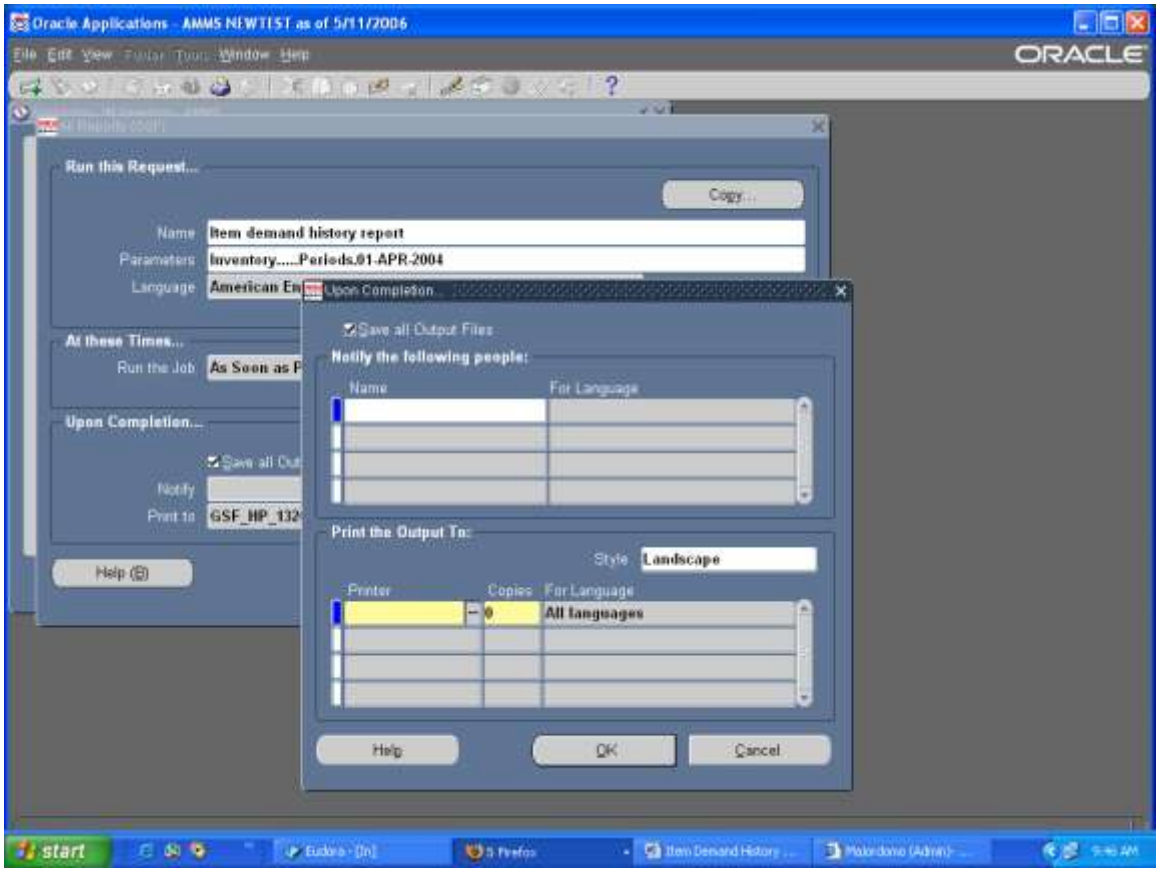
Step Description: To print the report, click on the Options button

Expected Results: Upon Completion window will appear



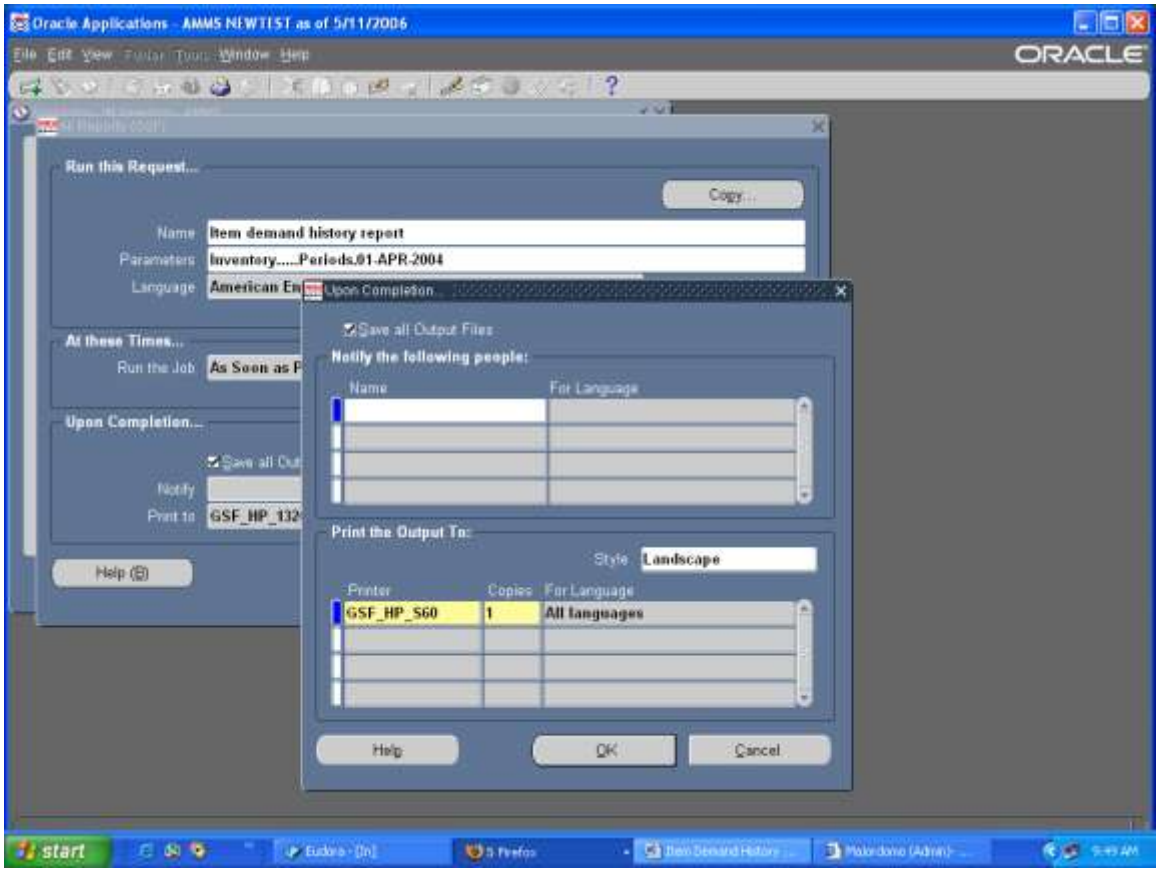
Step Description: In the Printer field click on the LOV and select the correct printer

Expected Results: List of Printers will appear



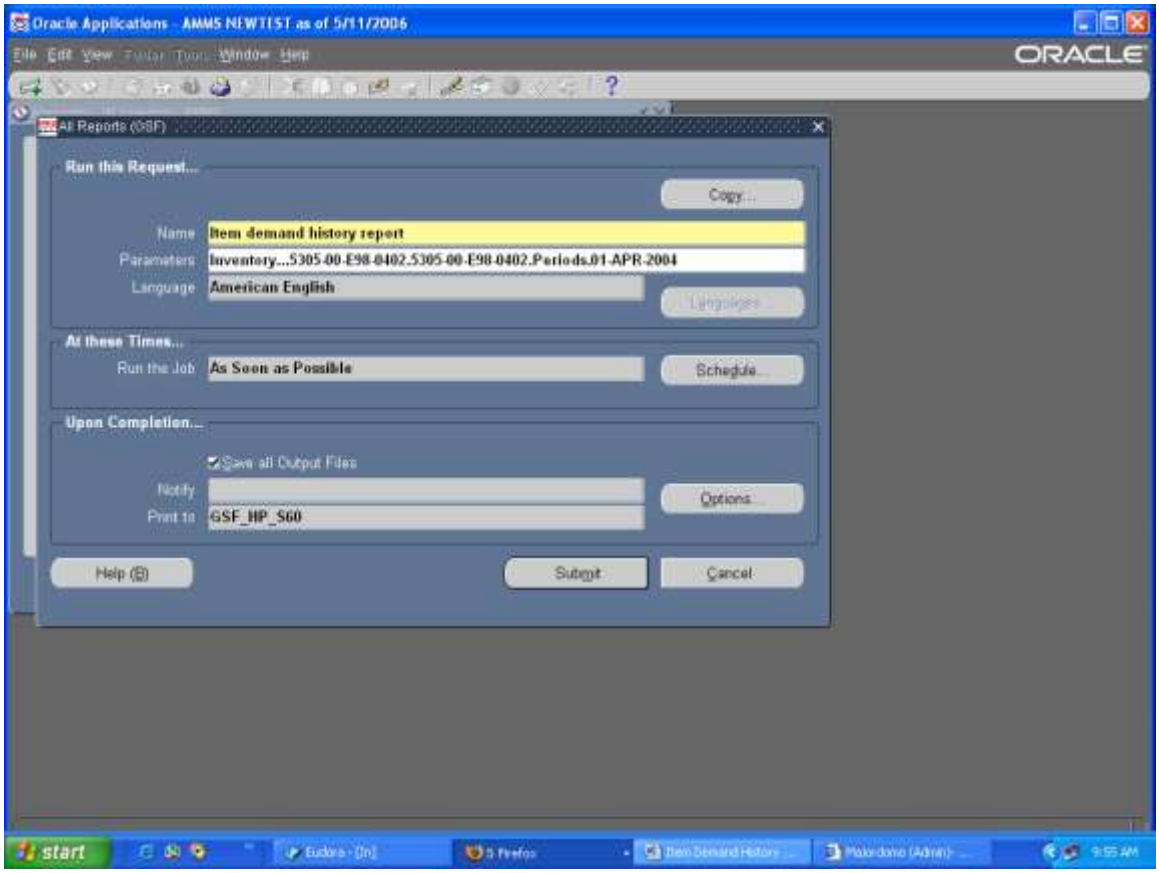
Step Description: From the list of printer select what printer you want the report to print to, the GSF_HP_S60 printer is the one at the back of the S60 office area, once you have selected the printer, select the number of copies you want, click in the Copies field and enter the number of copies that you want, click OK to the window

Expected Results: Return to the All Reports window



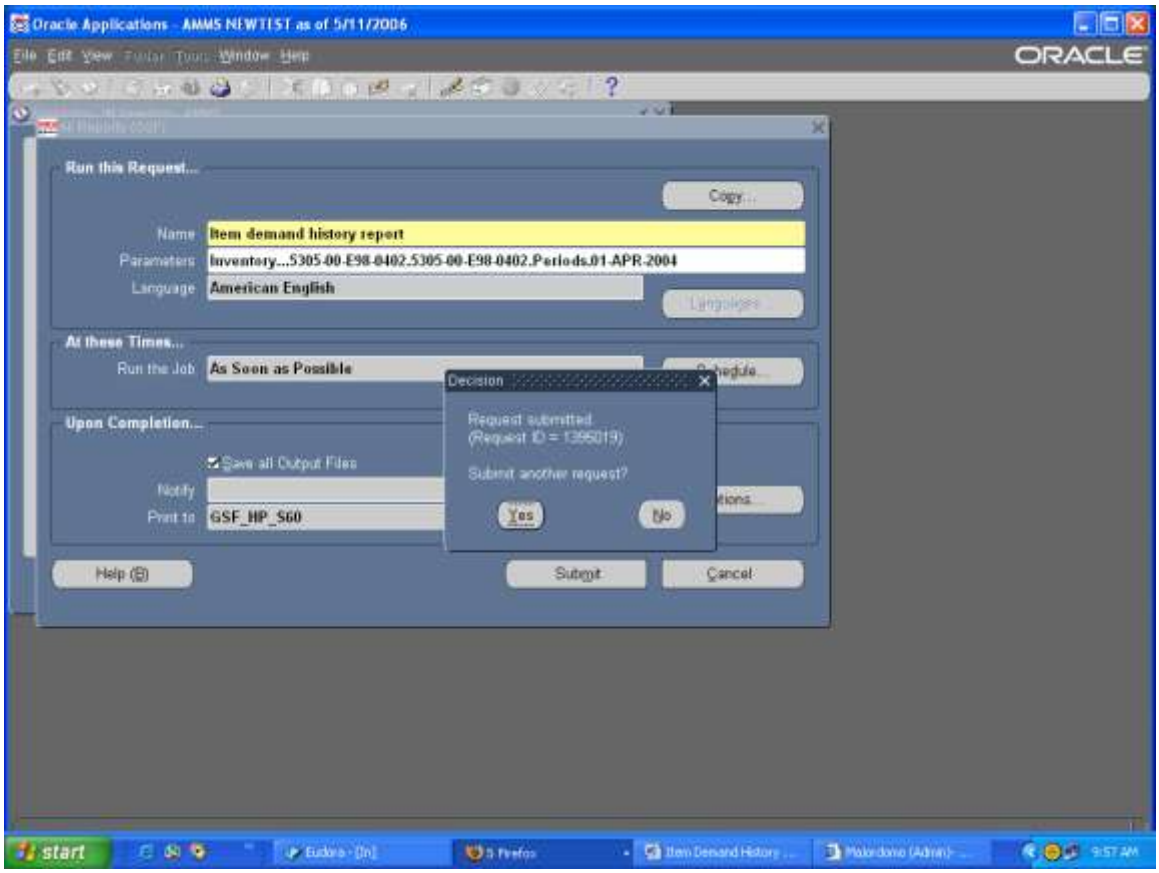
Step Description: Now click the Submit button

Expected Results: Decisions window will appear



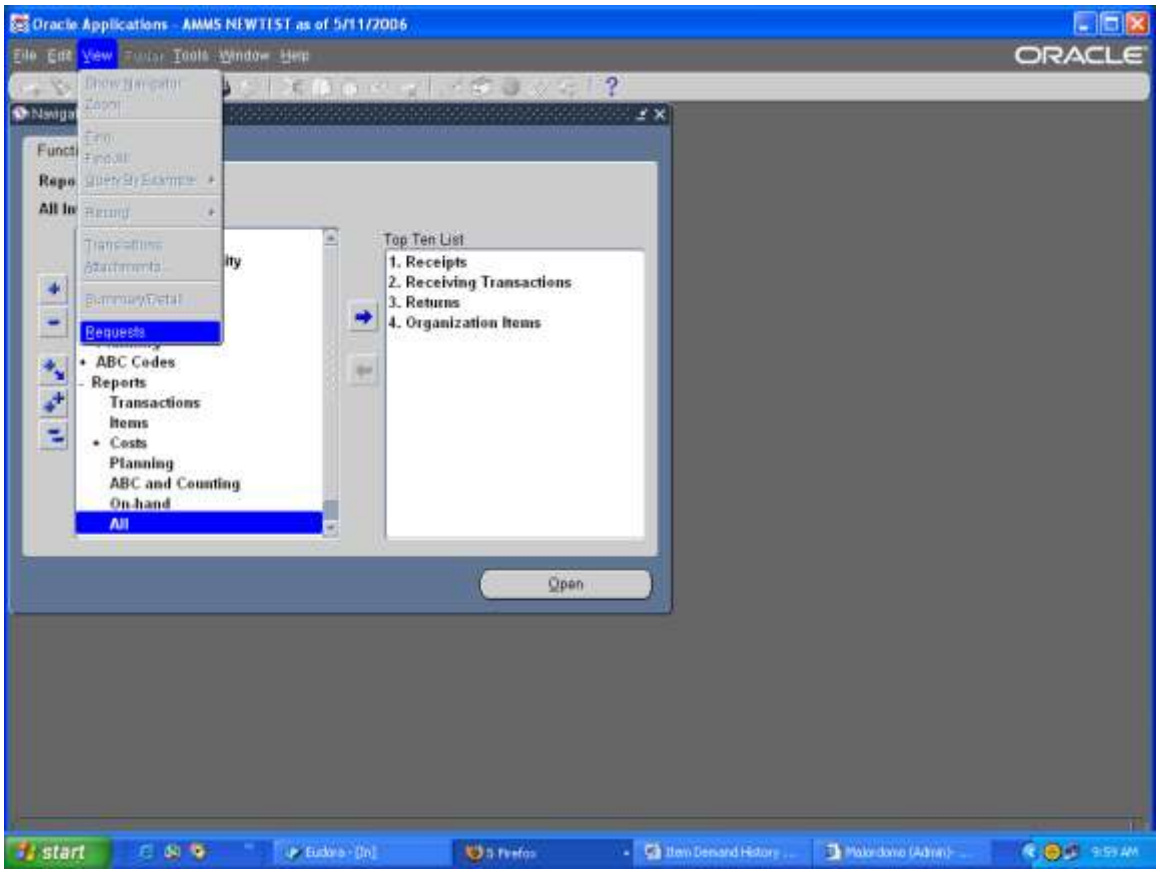
Step Description: The Decision window has your Oracle Report Request ID number take note of this number, Click No to the Decision window

Expected Results: Return to the IM Inventory Main Menu



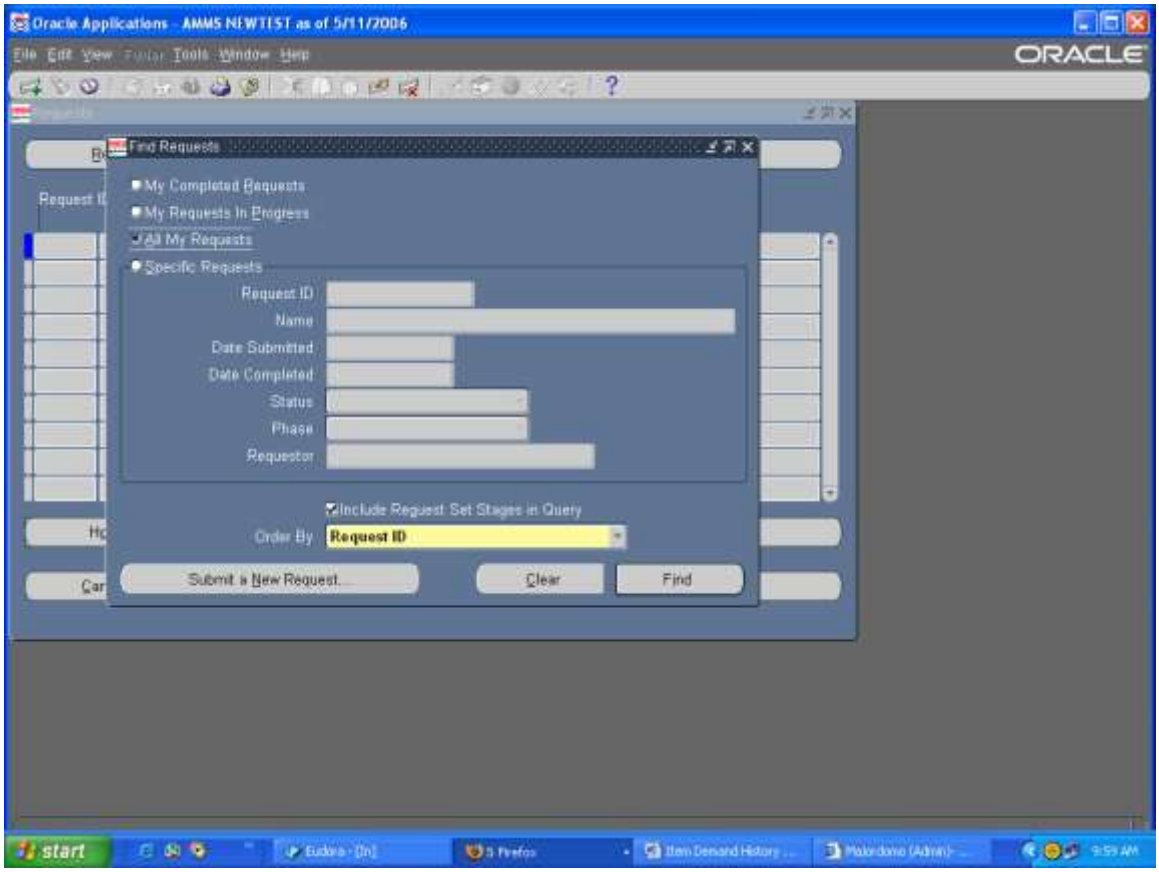
Step Description: To review the status of you report request, from the toolbar select View > Requests

Expected Results: Find Request window will appear



Step Description: Click on the Find button

Expected Results: Request window will appear



Step Description: Find your request and click on the Refresh button until the status is Completed Normal

Expected Results: Report should print on the above indicated printer

AMMS TRAINING SCRIPT

Navigate on Item Number

Purpose

The purpose of this training script is to walk you though the different attributes of an Item Number and how it is set up in Oracle.

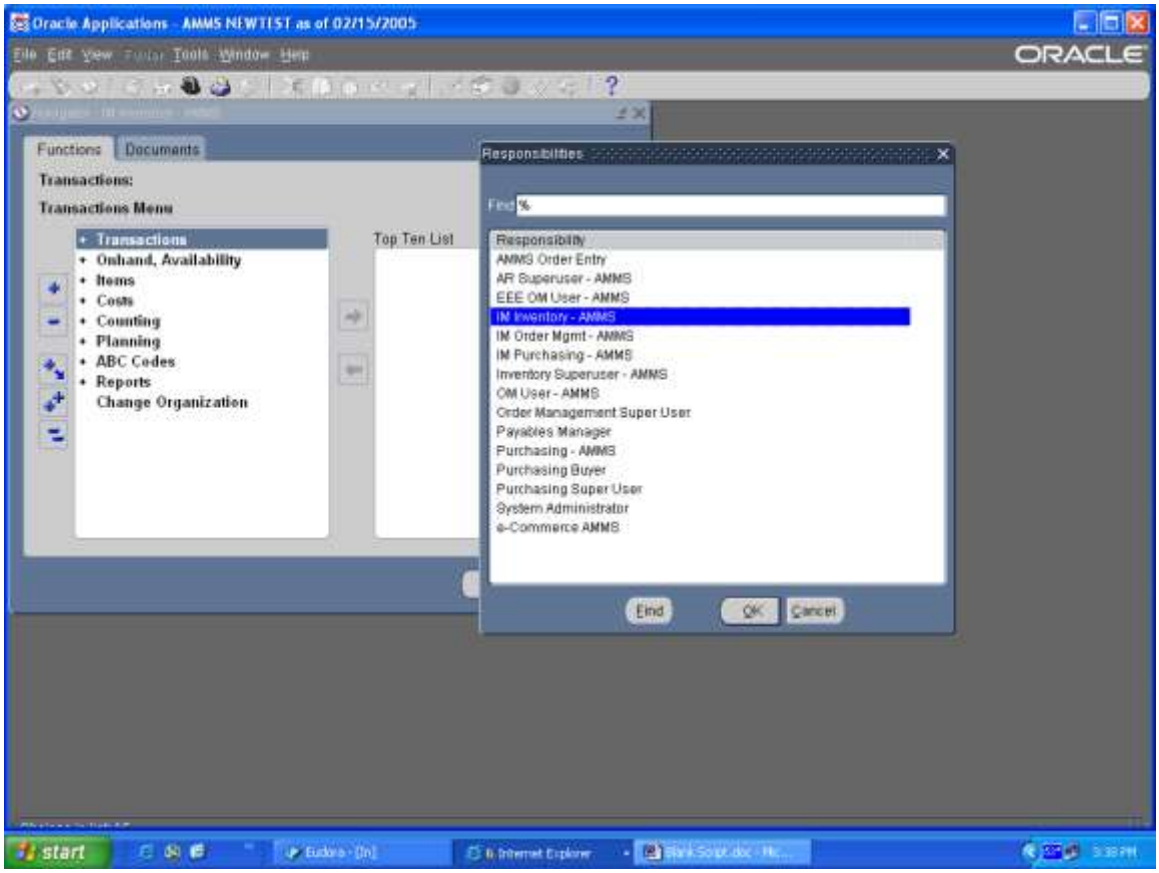
Audience

Supply Team Lead and Material Coordinator

Prepared By	Theresa Coulson
Creation Date:	03/28/2005
Document Name	Navigate in Item Number.doc
Version	2
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Inventory.	

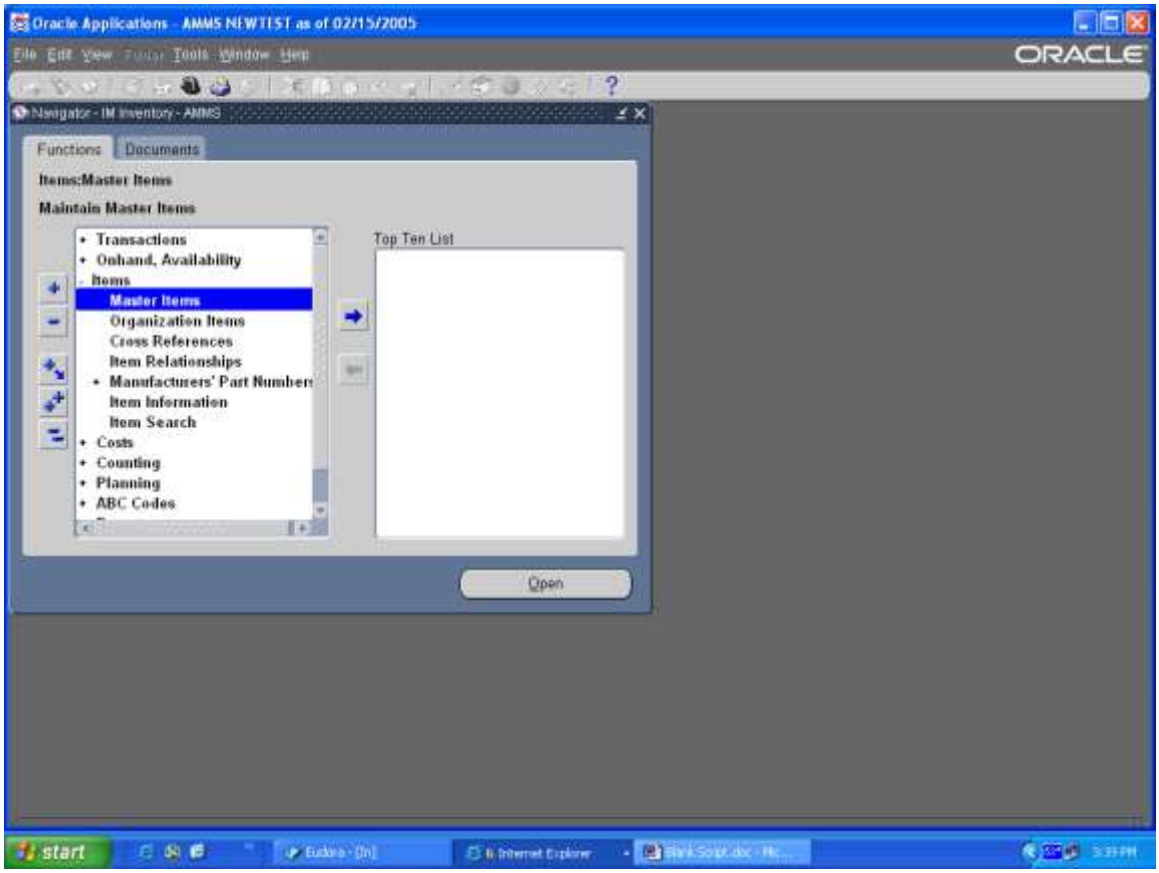
Step Description: Sign onto Oracle and select the IM Inventory AMMS responsibility, click on OK

Expected Results: IM Inventory AMMS main menu will appear



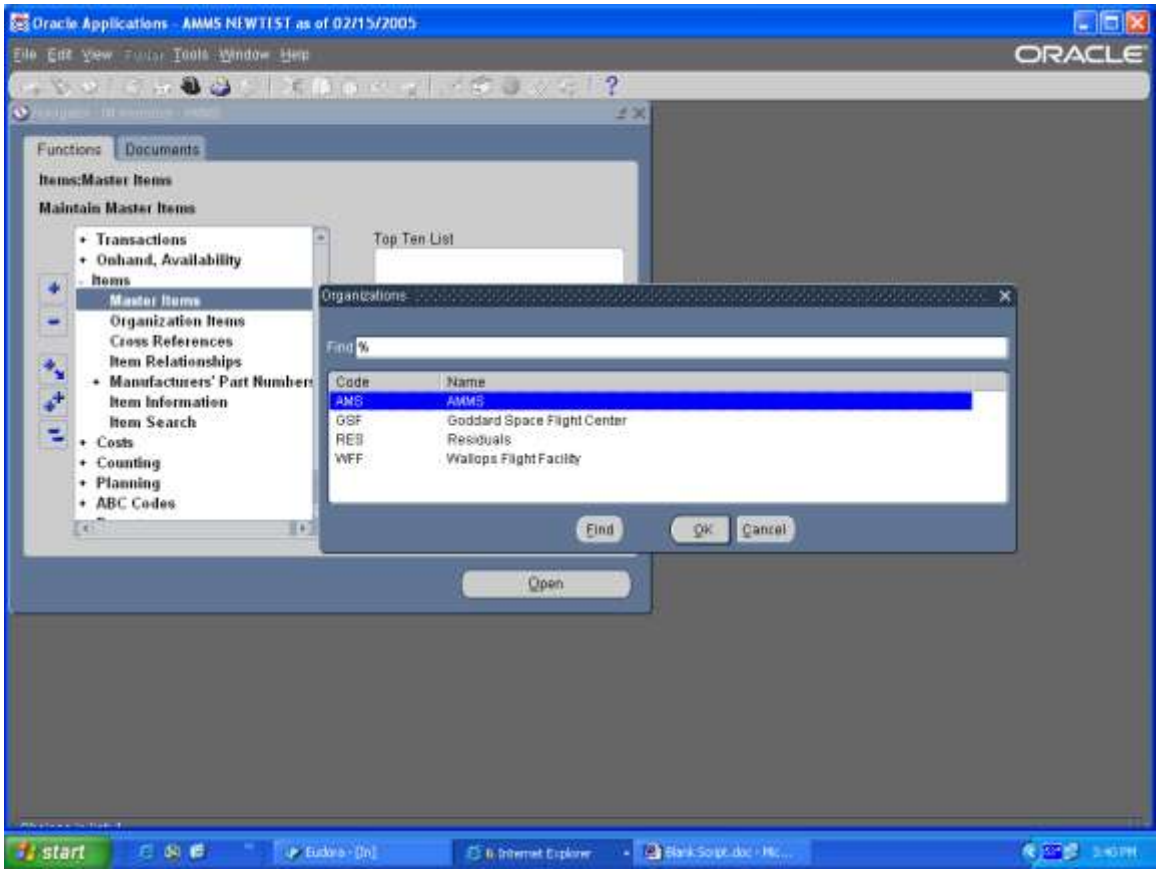
Step Description: From the IM Inventory AMMS main menu select, Items > Master Items, click on the open button

Expected Results: Organization window will appear



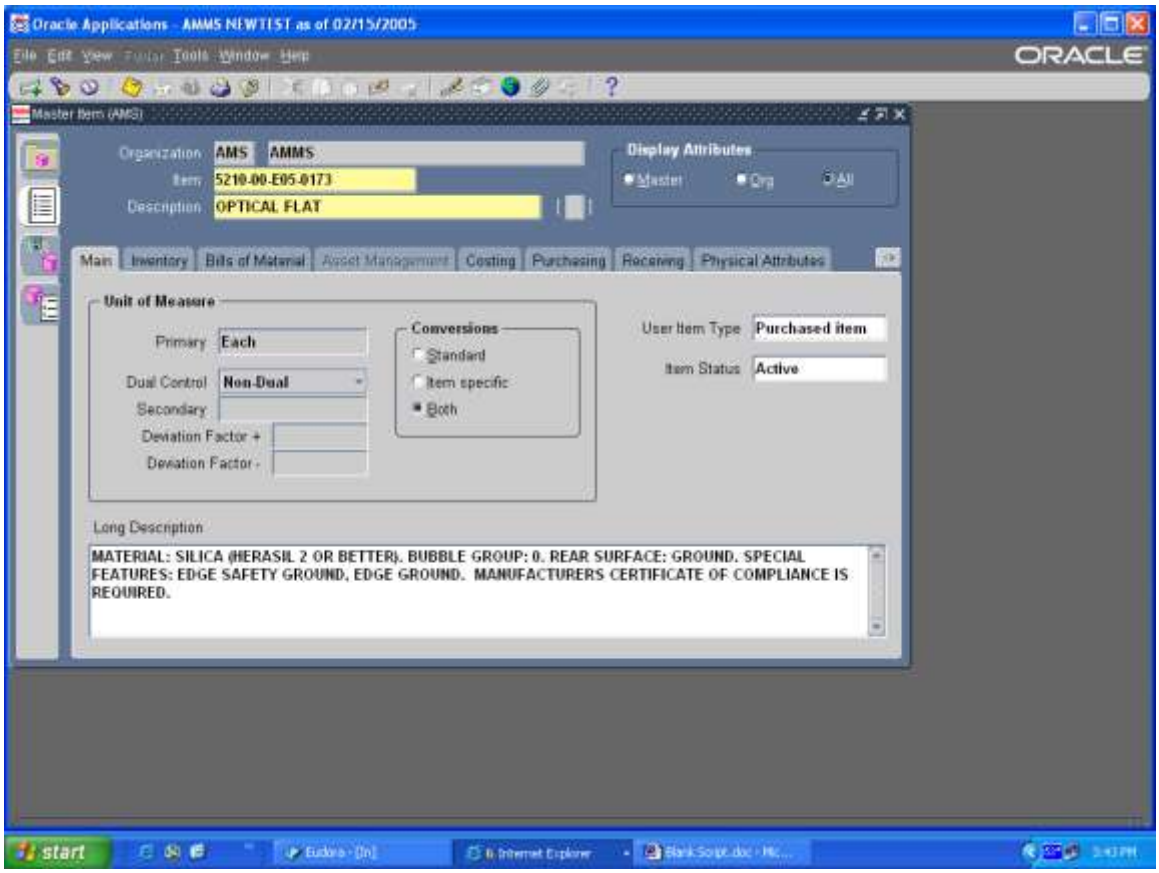
Step Description: Select the appropriate organization, AMS is the Master Organization, GSF is for Goddard, and WFF is for Wallops, click OK

Expected Results: Blank Master Item window will appear



Step Description: Press the F11 button on your keyboard to send Oracle into a query mode, enter the Item Number in the Item field, then hold down the Control (Ctrl) button and press the F11 button again, this will end the query mode.

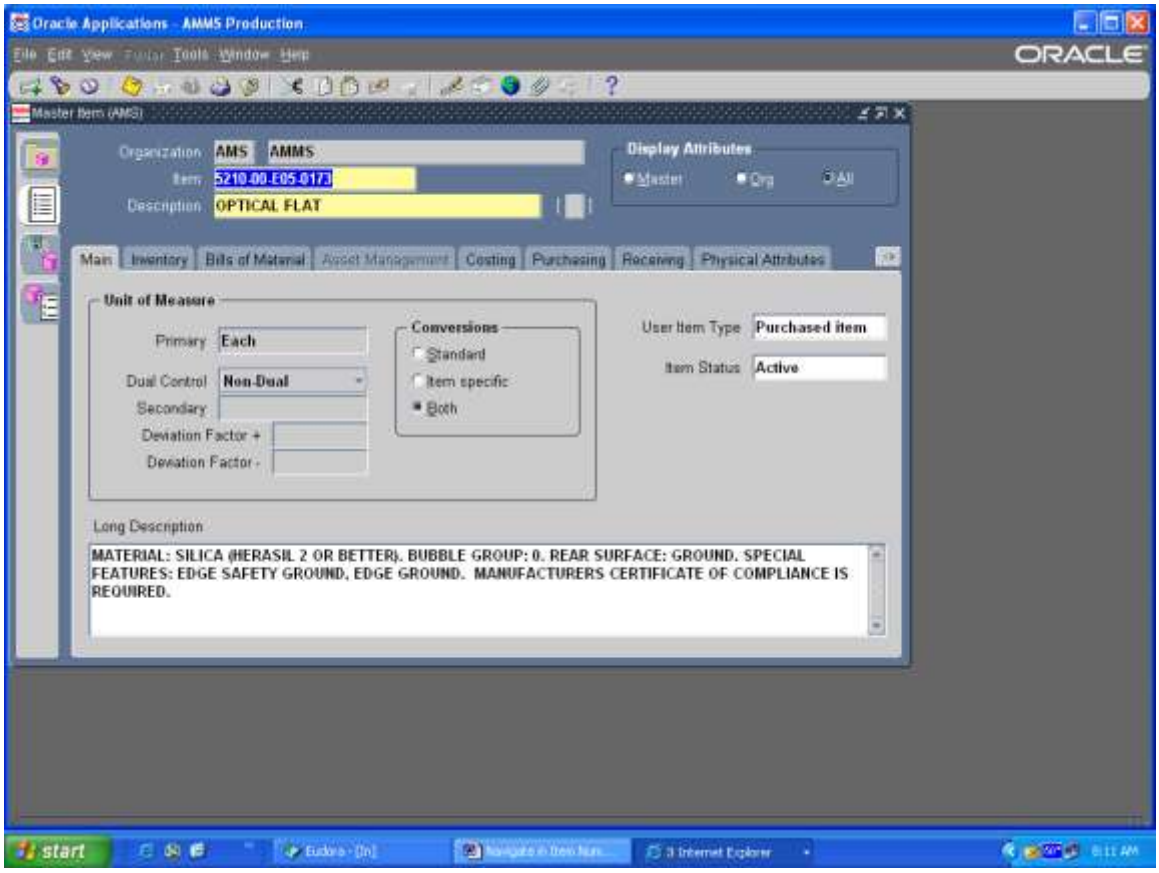
Expected Results: Data will populate the window



Step Description: This is the Main tab, this tells you the Item Number, Description (Noun), Primary Unit of Measure, User Item Type, Item Status, and long description.

Click on the Inventory Tab.

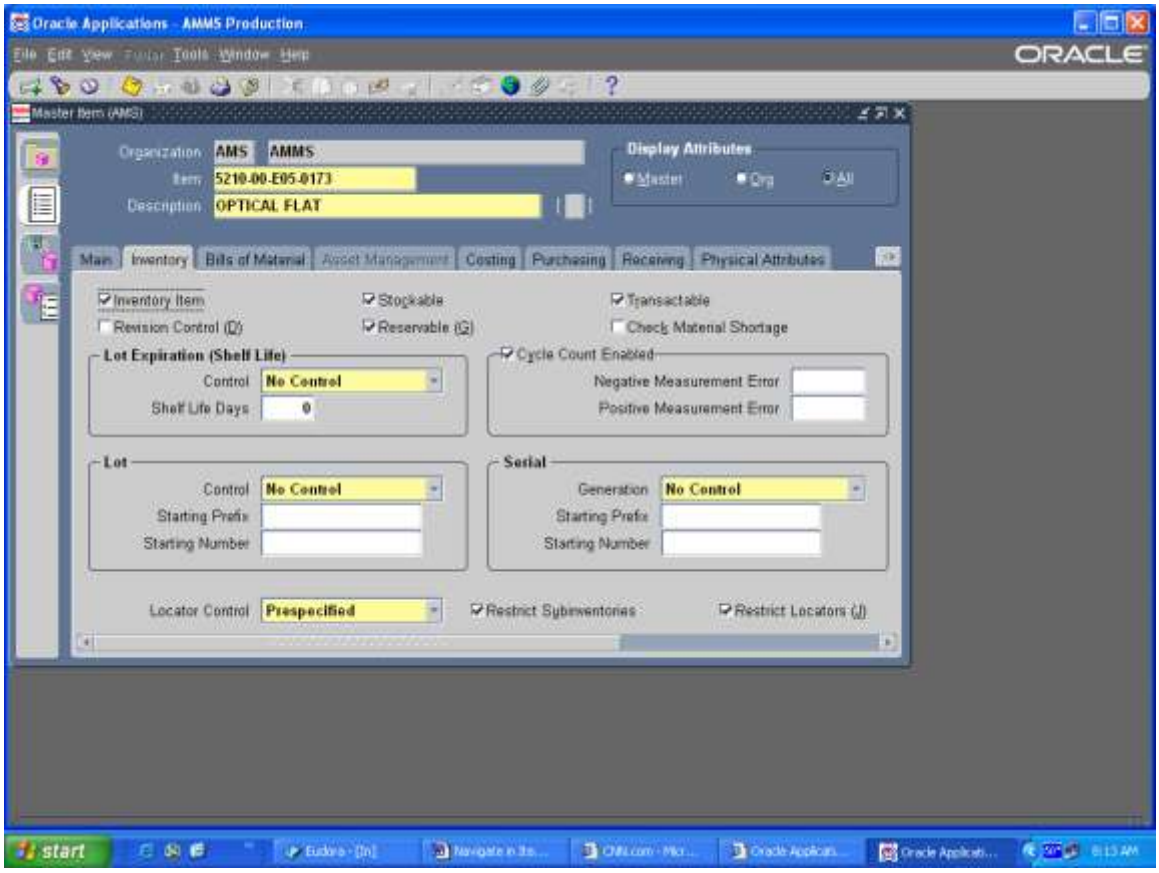
Expected Results: Window view will change



Step Description: The Inventory tab tell you if the item is Shelf Life, if it is an Inventory, or Expense item, Stockable, Transactable, or Reserveable.

Click on the Bills of Material Tab

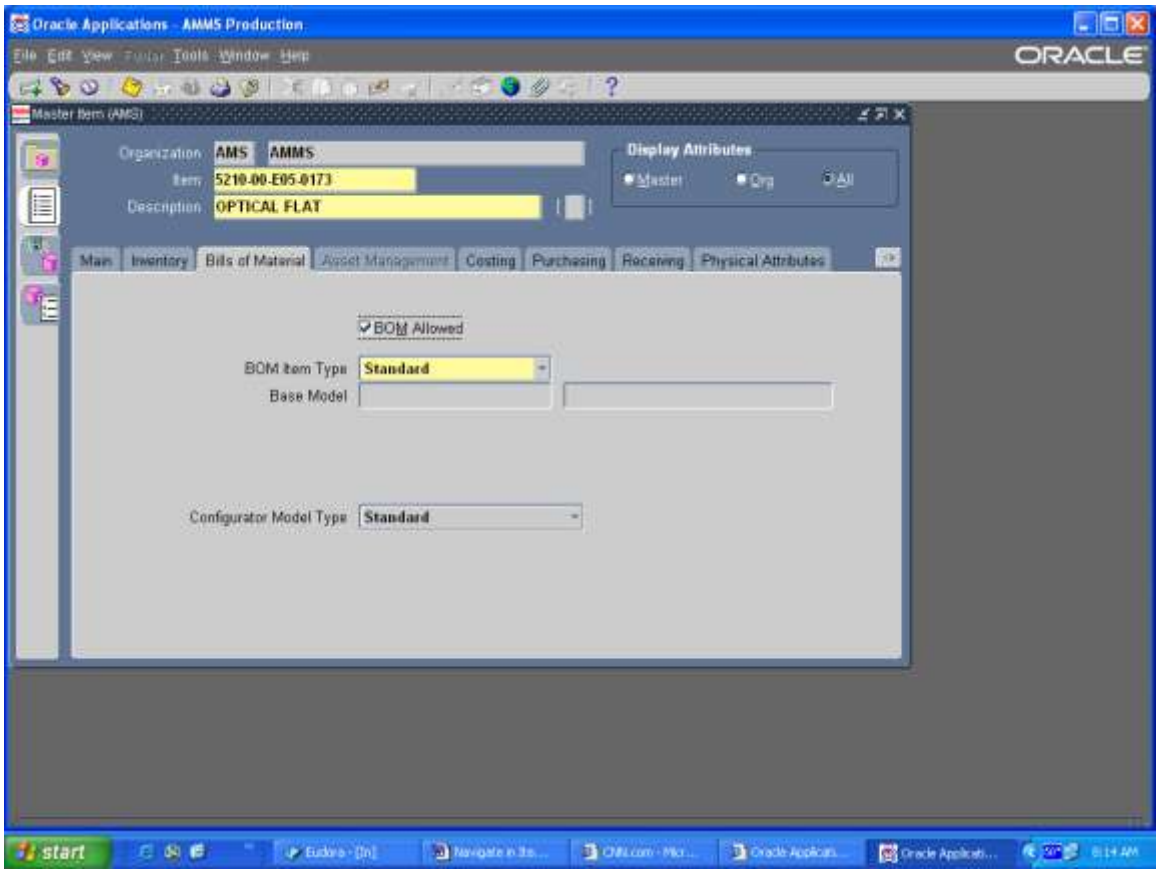
Expected Results: Window view will change



Step Description: Bill of Material tab just tells you that this is a Standard Pay Item

Click on the Costing Tab

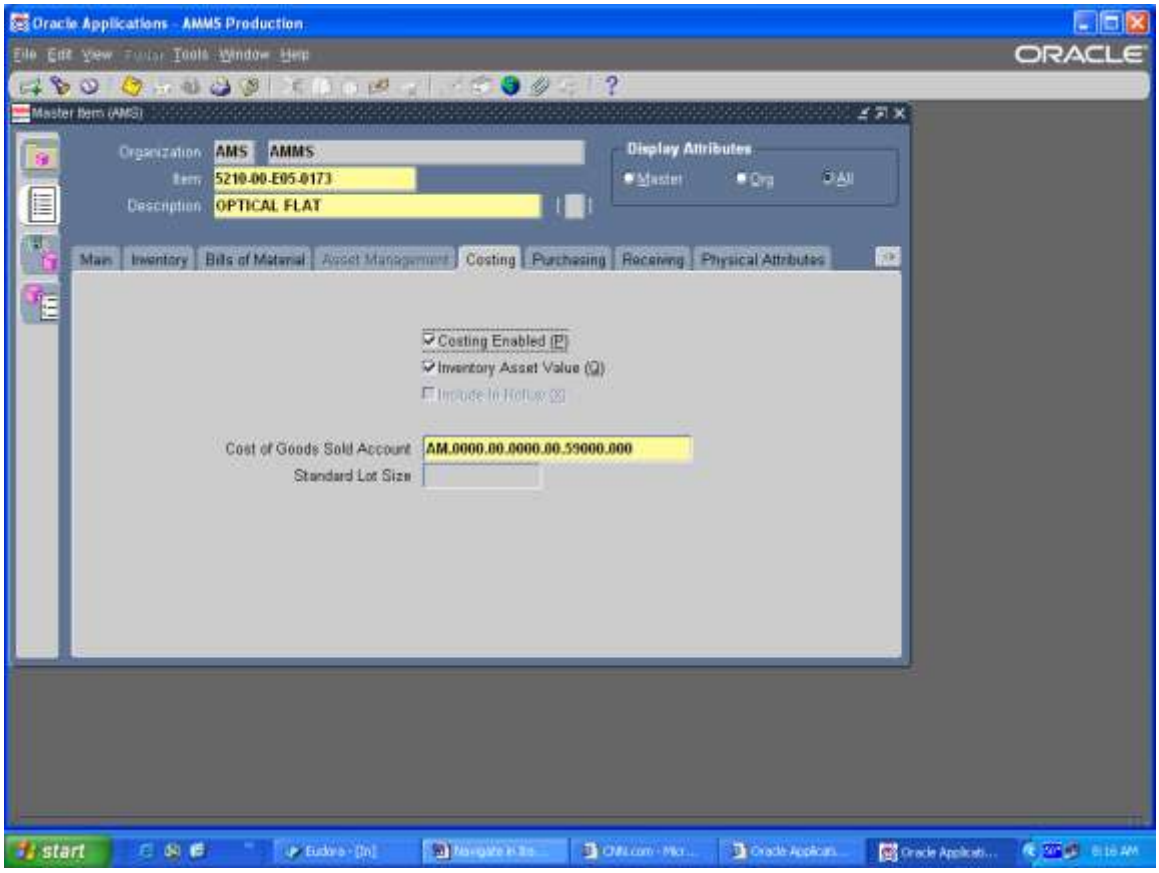
Expected Results: Window view will change



Step Description: The Costing tab will tell you that this item is Cost Enabled, has an Inventory Asset value, and what the Master General Ledger number is.

Click on the Purchasing Tab

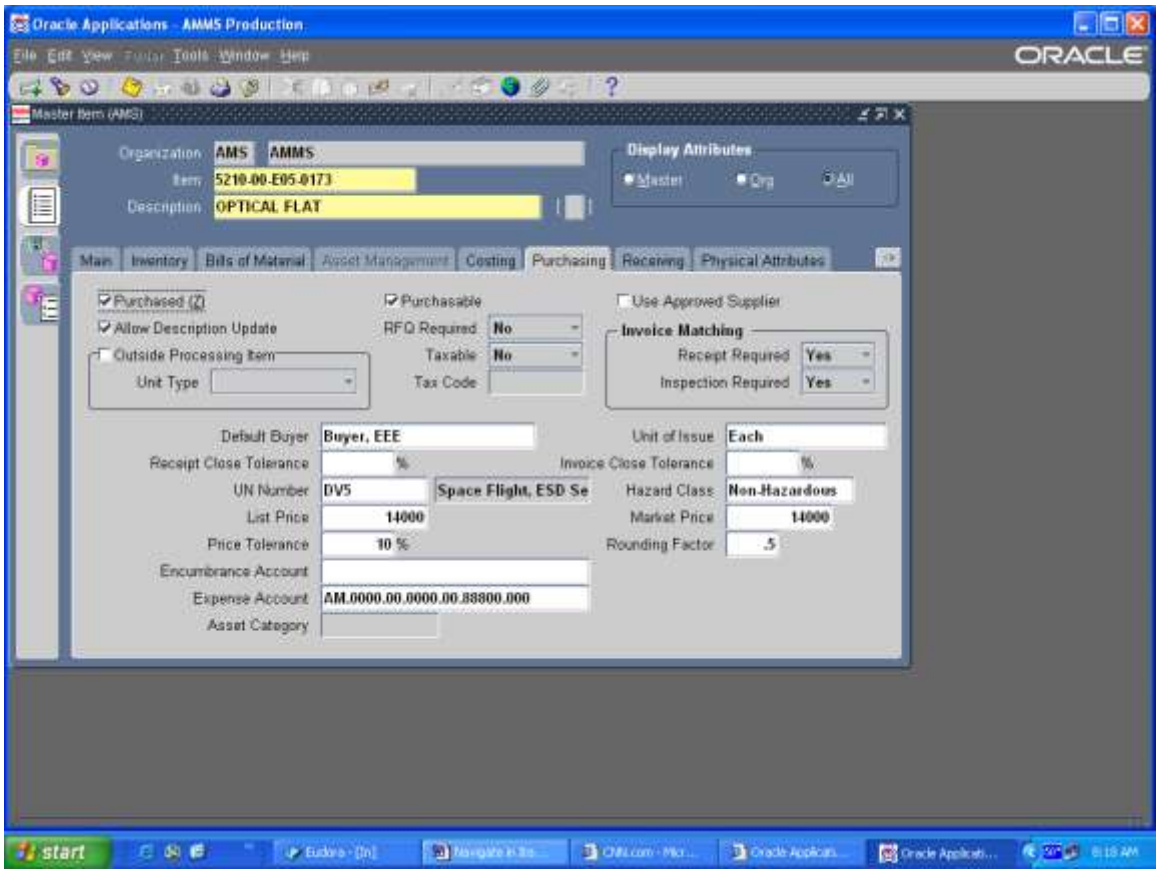
Expected Results: Window view will change



Step Description: The Purchasing tab tell you if the item is Purchase, Purchasable, the Default Buyer, Unit of Issue, UN Number, Hazardous Class, List Price, Market Price, Price Tolerance, Rounding Factor, and the Expense Account GL number.

Click on the Receiving tab

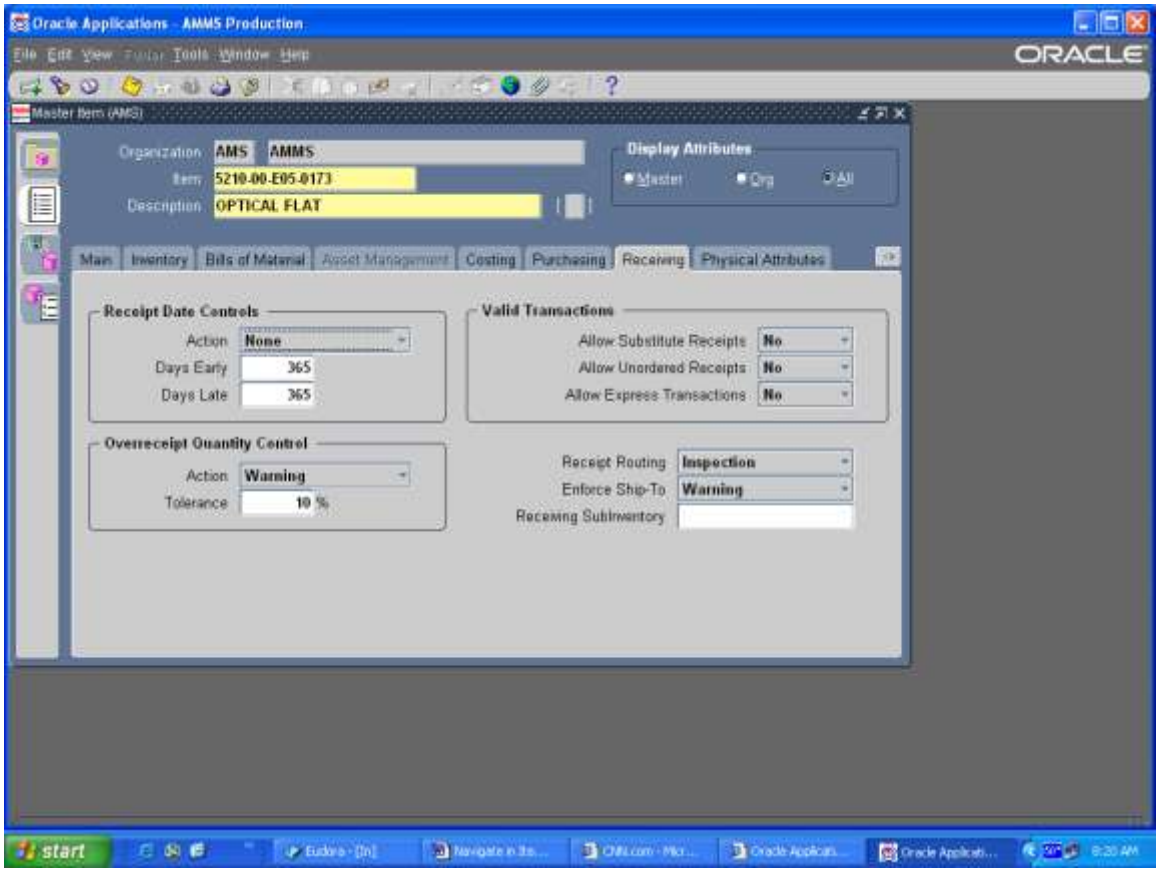
Expected Results: Window view will change



Step Description: The Receiving tab tells you if the item allow substitutes, and the Receipt Routing.

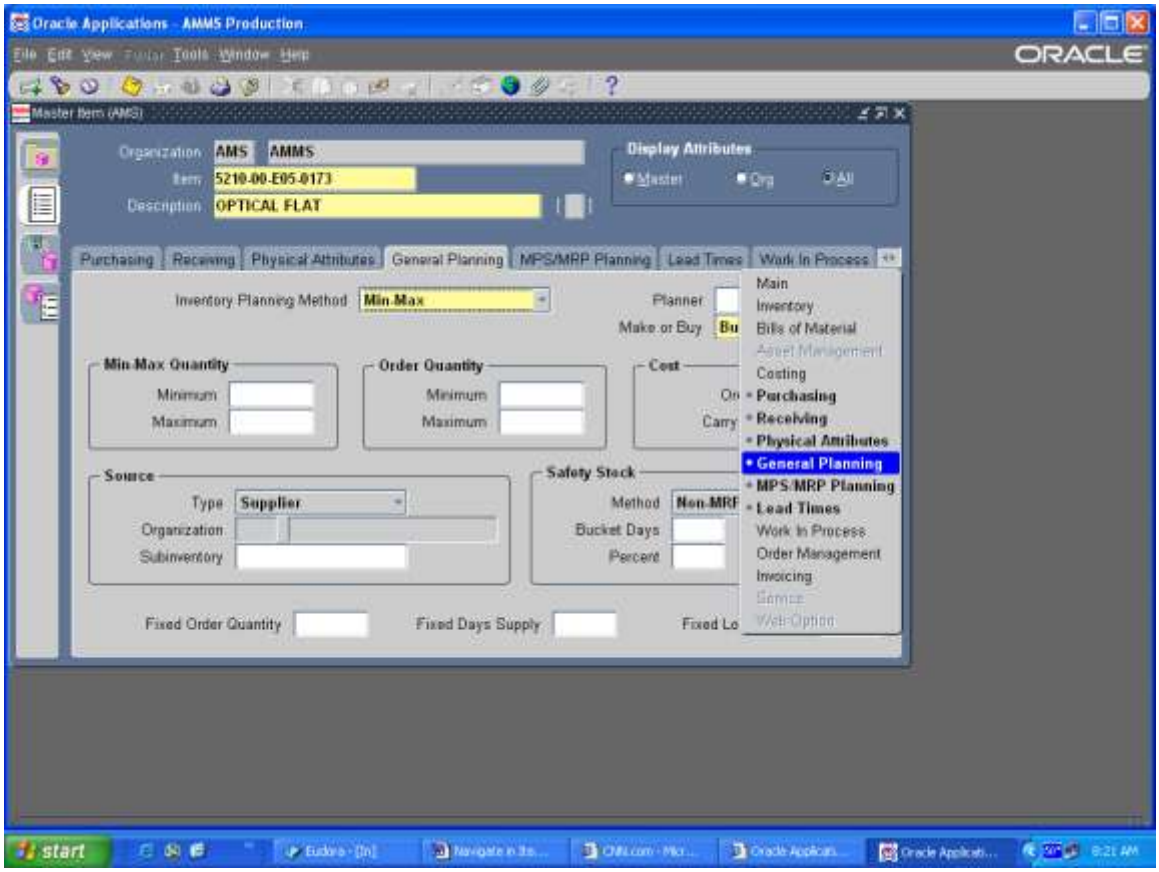
Click on the arrow for a drop down of more tabs

Expected Results: Window view will change



Step Description: From the list of tabs select General Planning

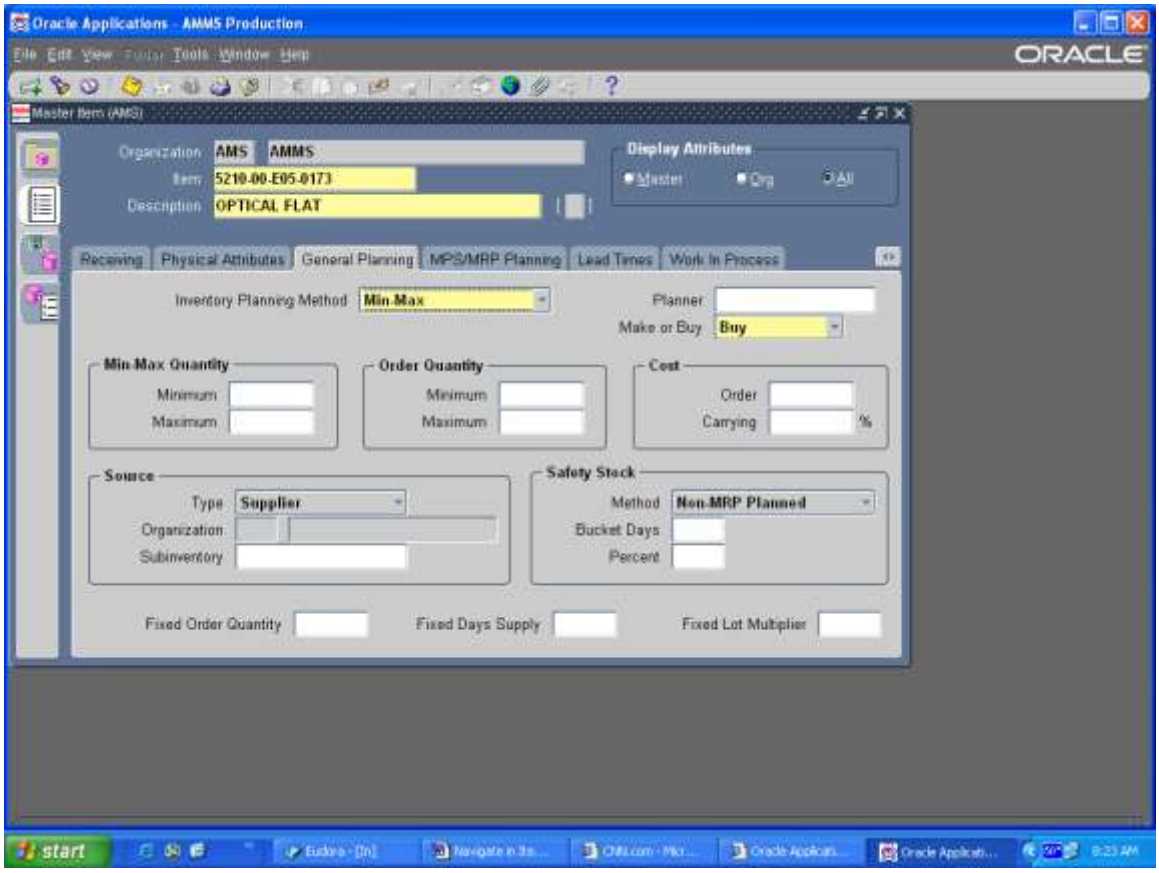
Expected Results: Window view will change



Step Description: The General Planning tab tells you the Inventory Planning method, at the Organization Level it will also tell you if there are any Min Max Levels.

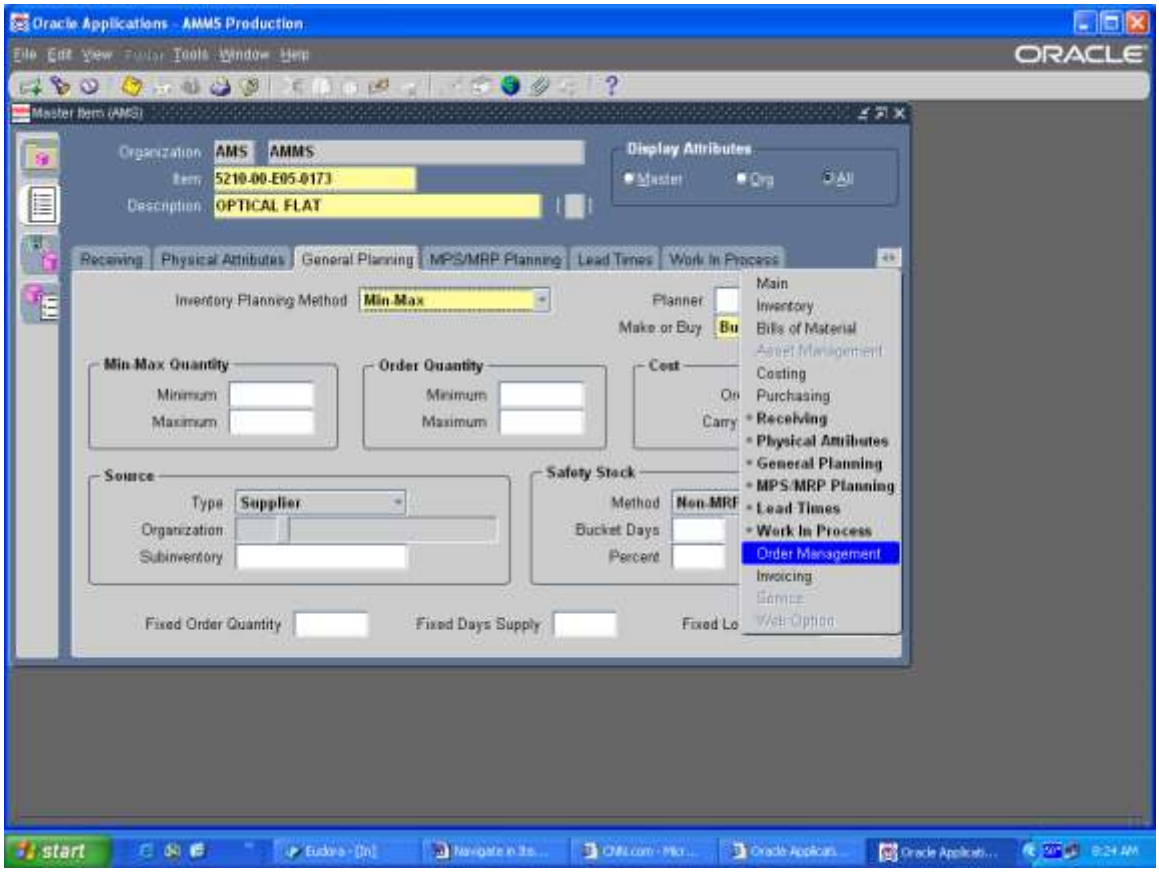
Click on the arrows again

Expected Results: A list of addition tabs will appear



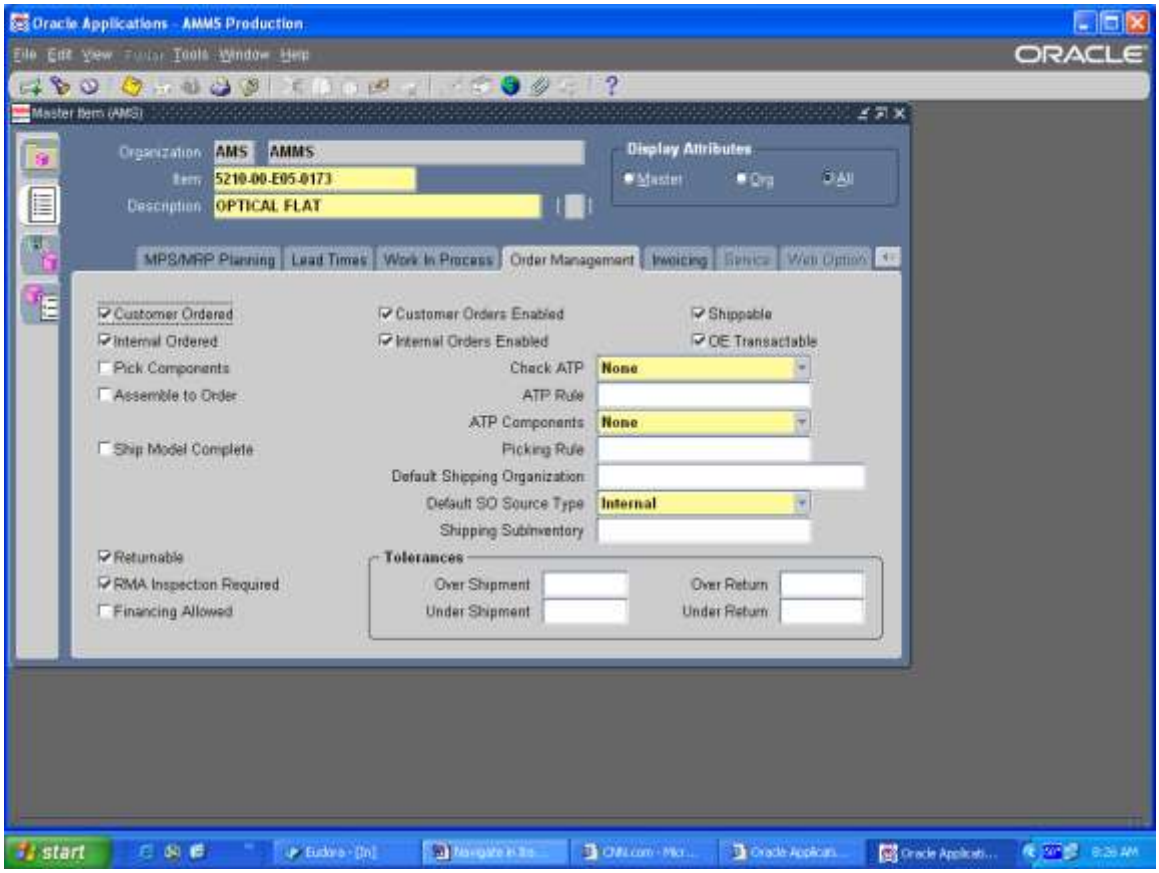
Step Description: From the list select Order Management

Expected Results: Window view will change



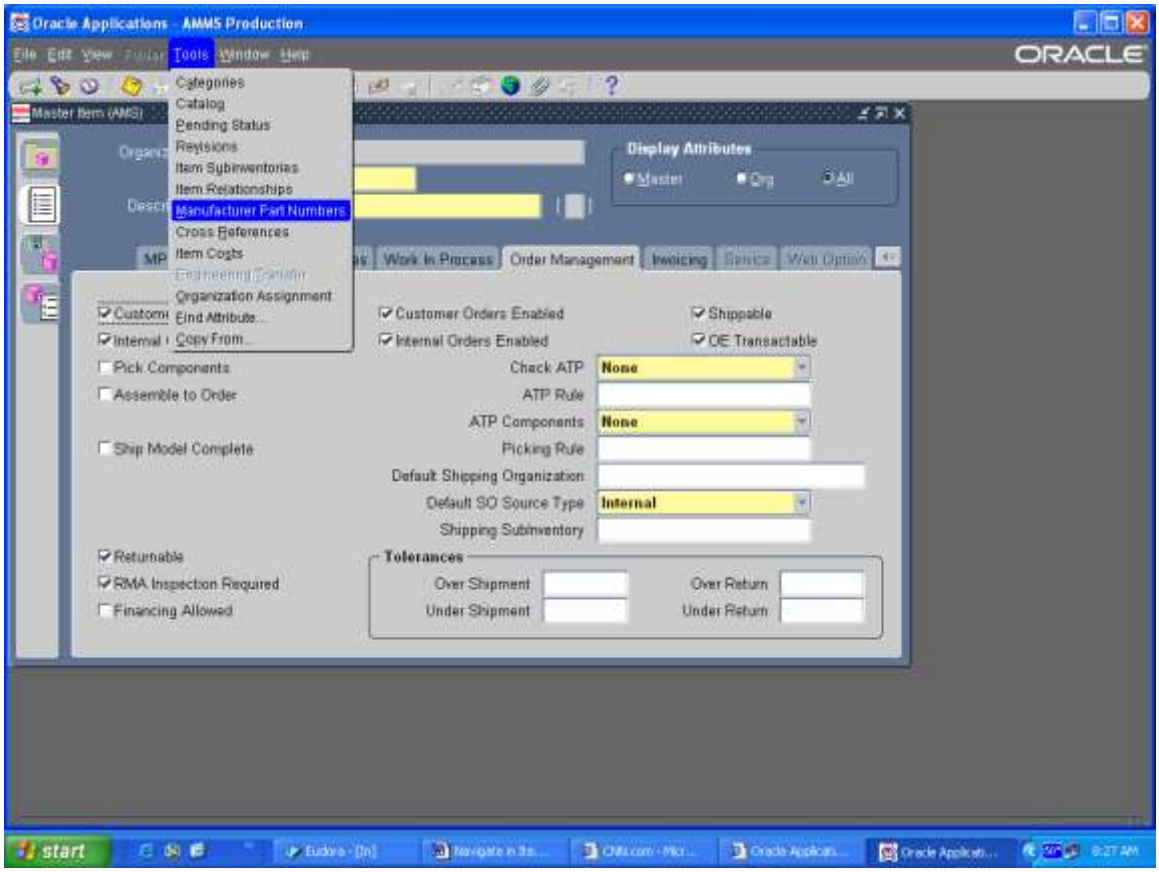
Step Description: The Order Management tab will tell you if this is an item that customer can order, is the item Shippable, Transactable, Returnable, and RMA Inspection Required

Expected Results: Window view will change



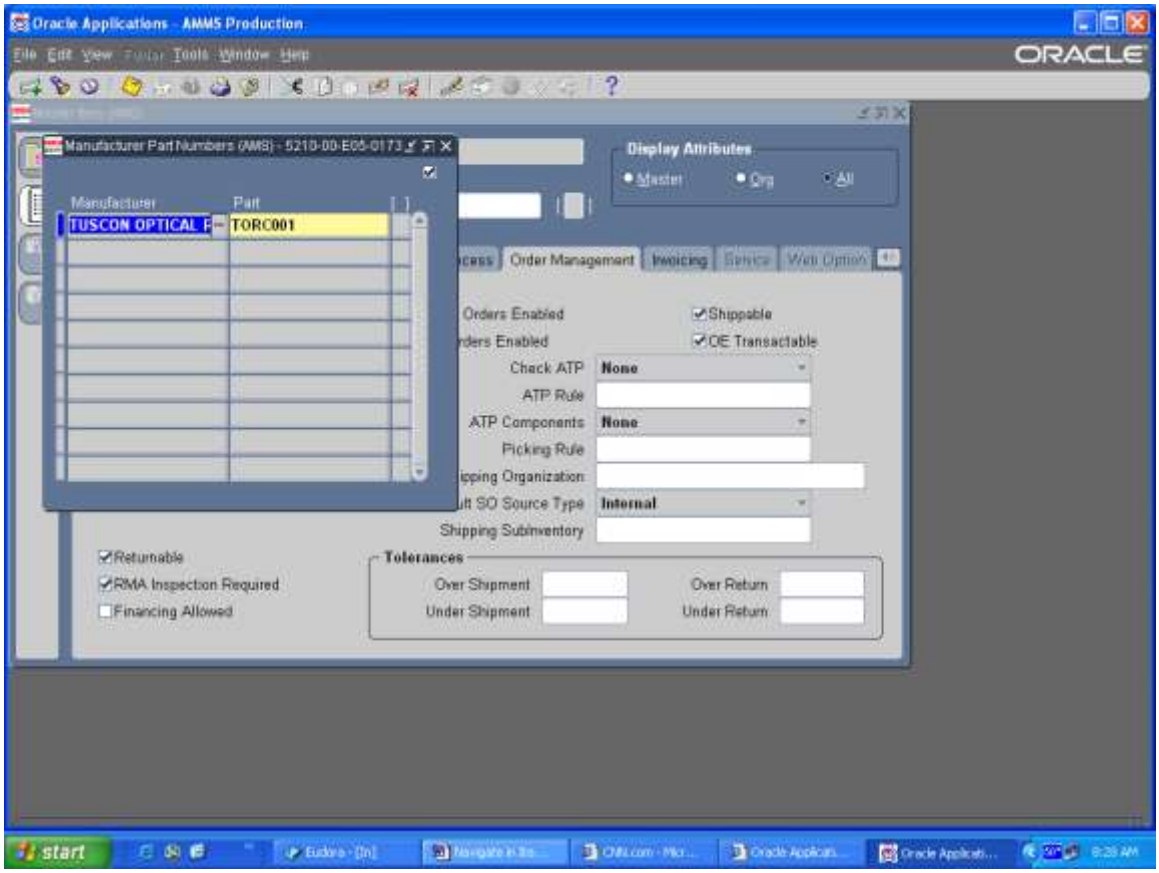
Step Description: From the tool bar select Tools > Manufactures Part Number

Expected Results: Manufactures Part Number window will appear



Step Description: This window will tell you who the Manufacture is, and what the Part Number is

Expected Results: Window will have data



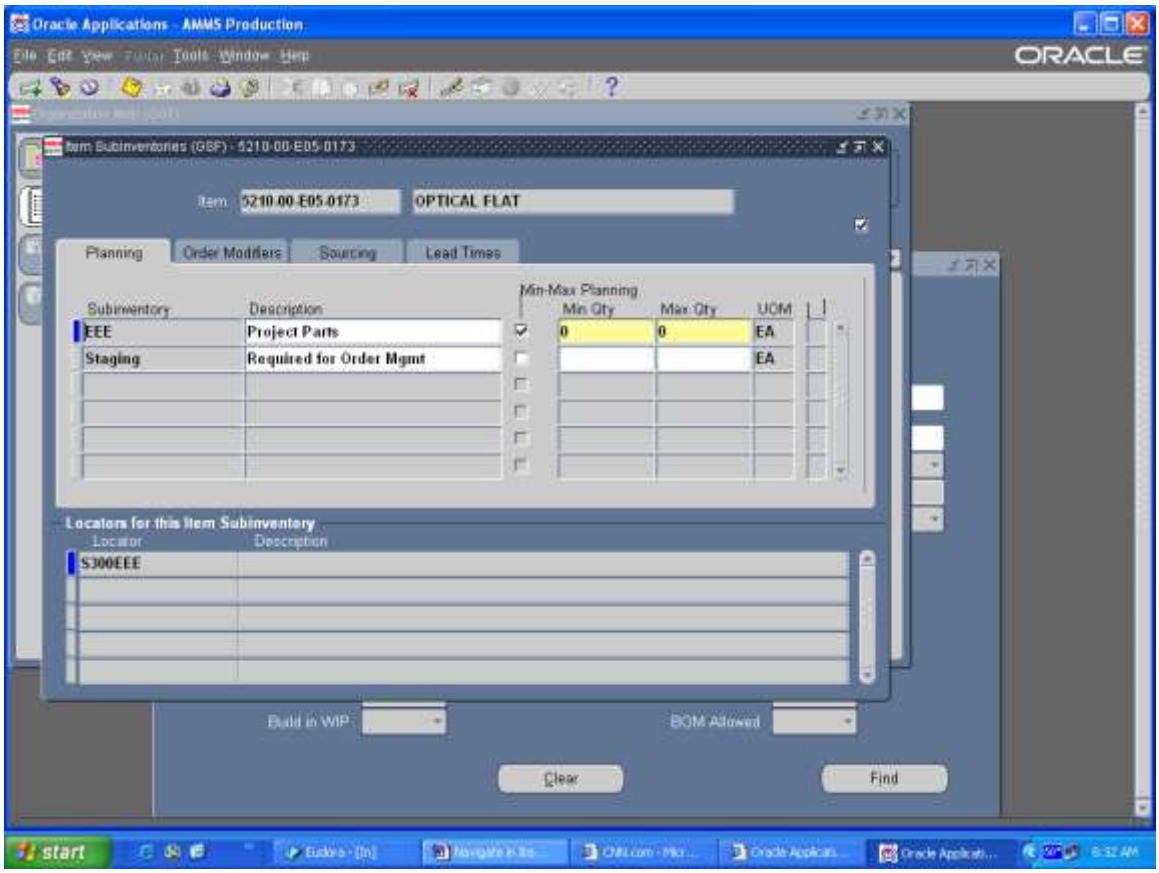
Close the Manufactures Part Number window

Step Description: At the Organization level, from the tool bar select Tools > Item Sub Inventories

Expected Results: Item Sub Inventory window will open

Step Description: This window tells you what sub inventory the item belongs to, and if there are any Min Max levels this will be on this screen also, at the bottom of the screen, it will also tell you the warehouse locator if there is one assigned.

Expected Results: Window will have data



AMMS TRAINING SCRIPT
Perform Miscellaneous Transaction

Purpose

The purpose of this training script is to give instructions on how to perform a Miscellaneous Transaction to adjust the on hand balance for an item

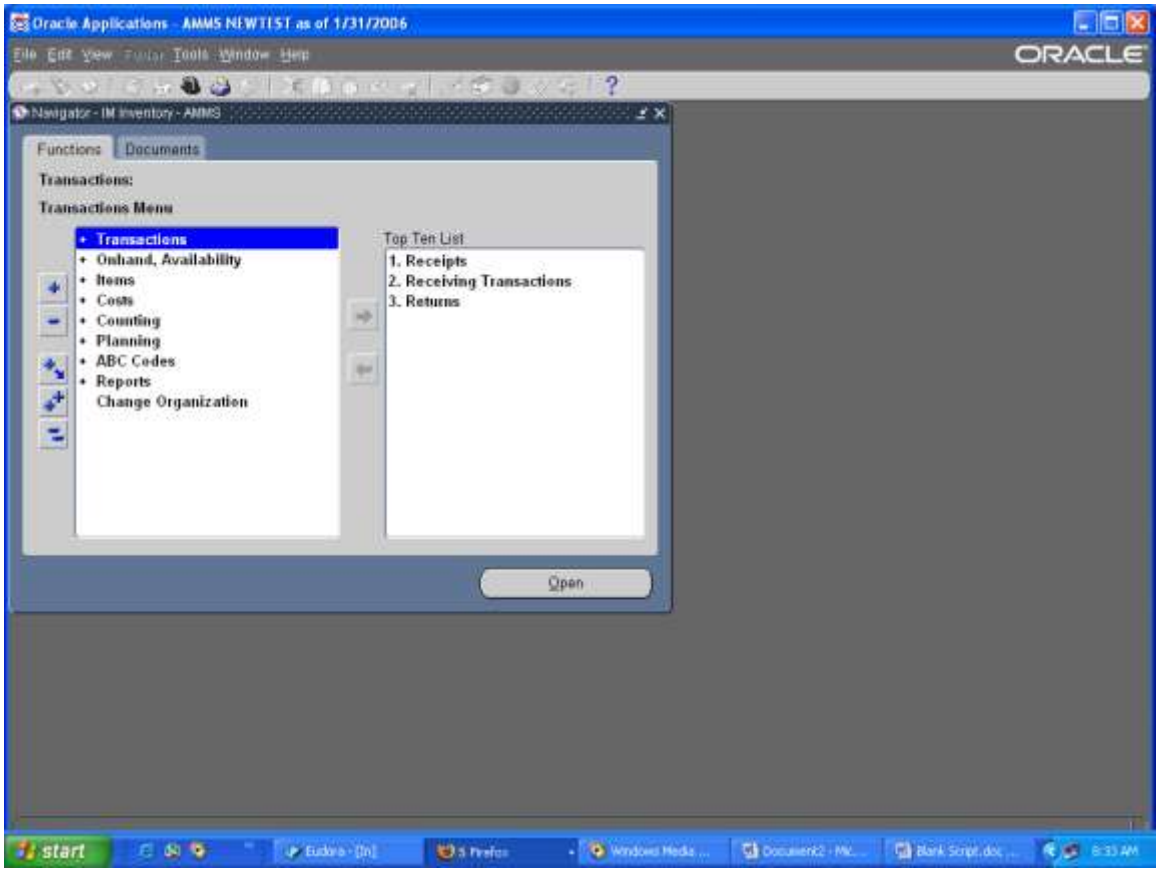
Audience

Supply Team Lead and Material Coordinators

Prepared By	Theresa Coulson
Creation Date:	03/30/2006
Document Name	Perform Miscellaneous Transaction.doc
Version	2
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Inventory.	

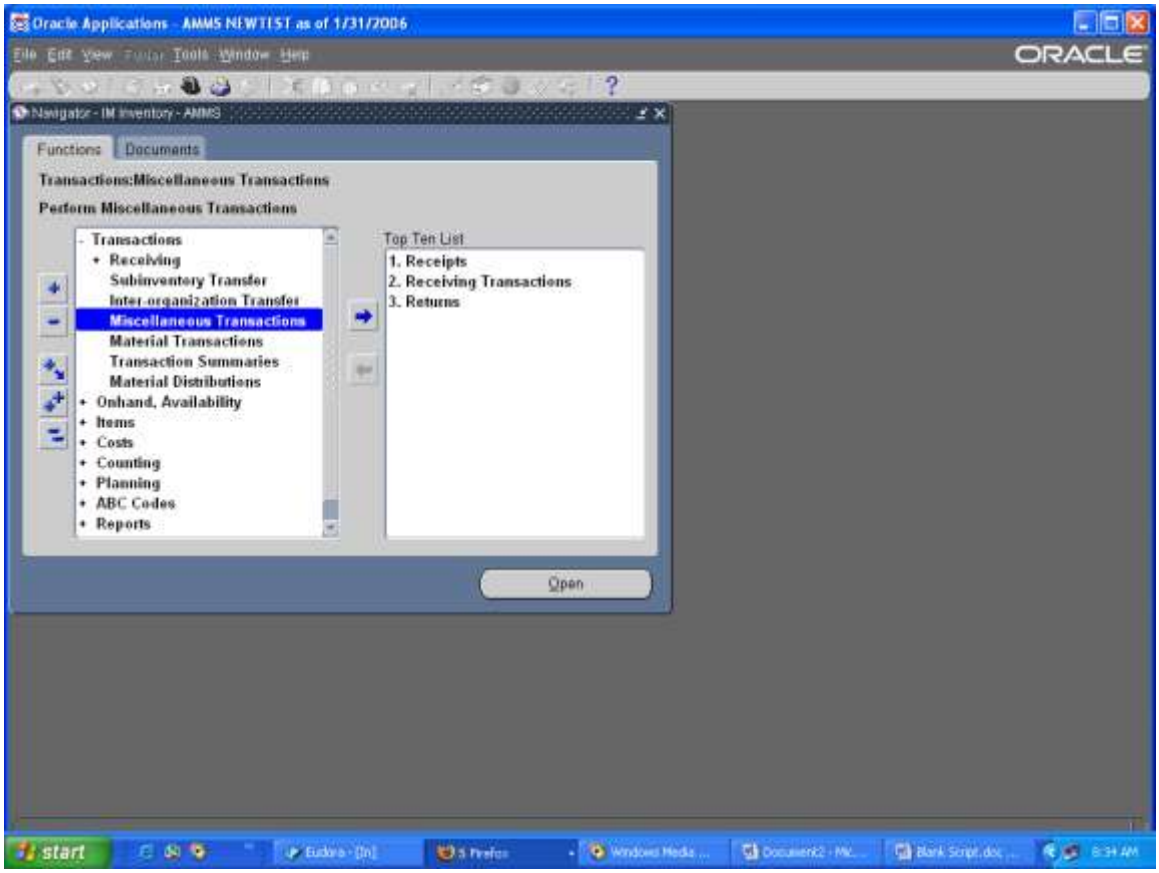
Step Description: Sign onto Oracle and select IM Inventory AMMS Responsibility

Expected Results: IM Inventory AMMS main menu will appear



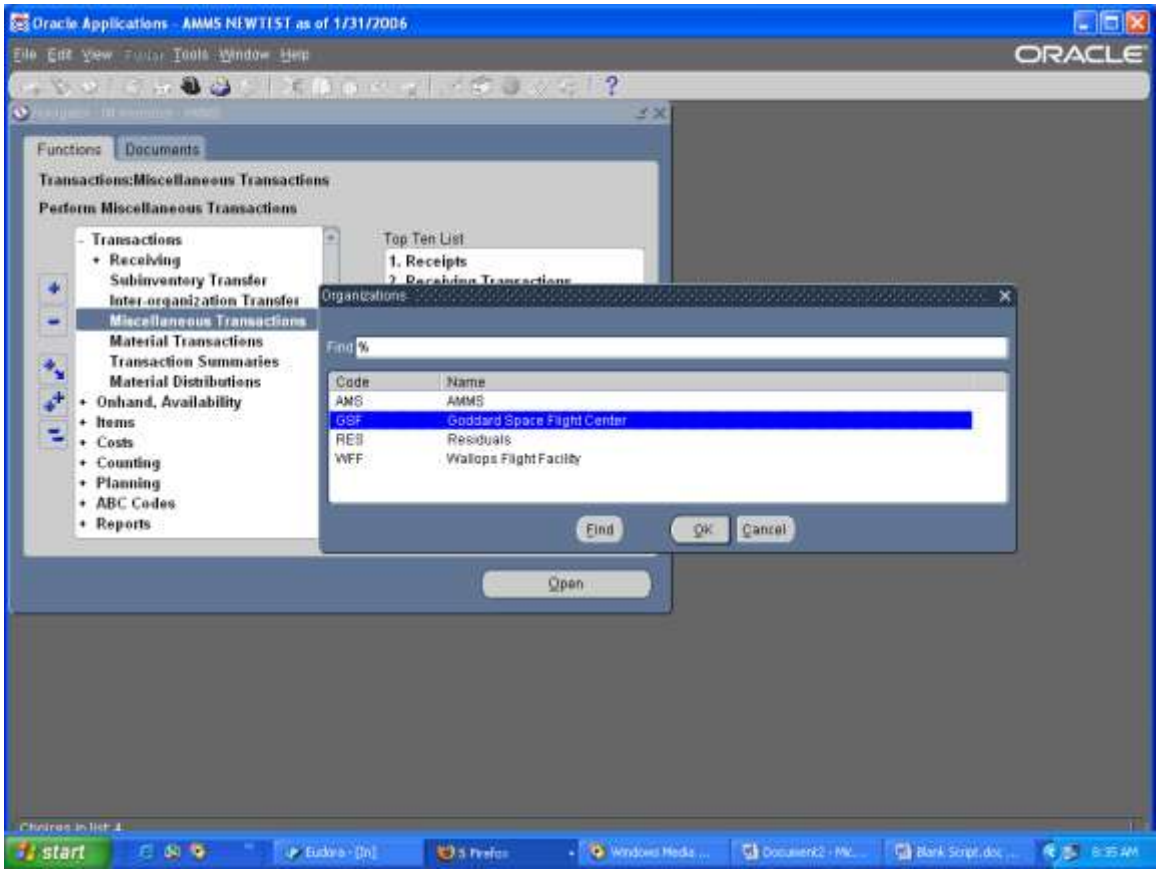
Step Description: From the IM Inventory AMMS main menu select Transactions > Miscellaneous Transactions, click on the Open button

Expected Results: Organization Window will appear



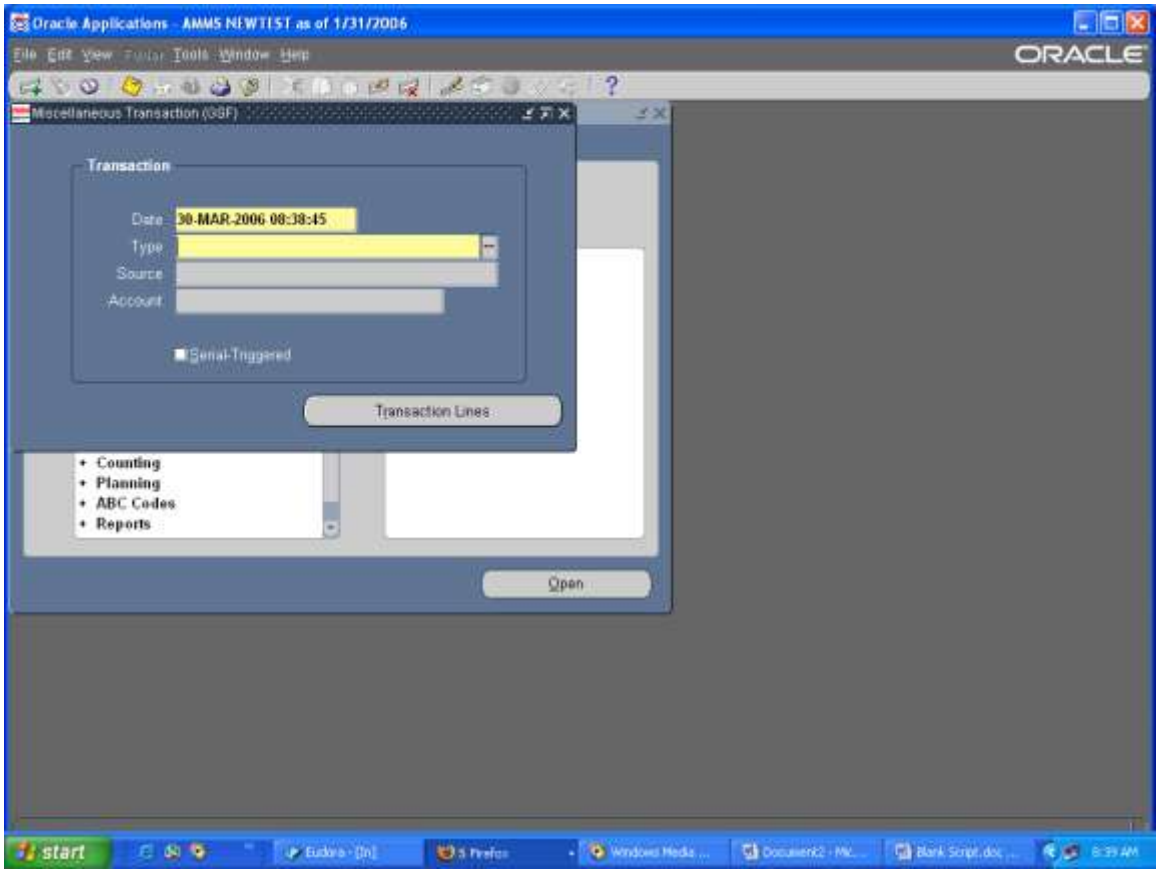
Step Description: Select the appropriate Organization, GSF for Goddard or WFF for Wallops, click OK

Expected Results: Miscellaneous Transaction window will appear



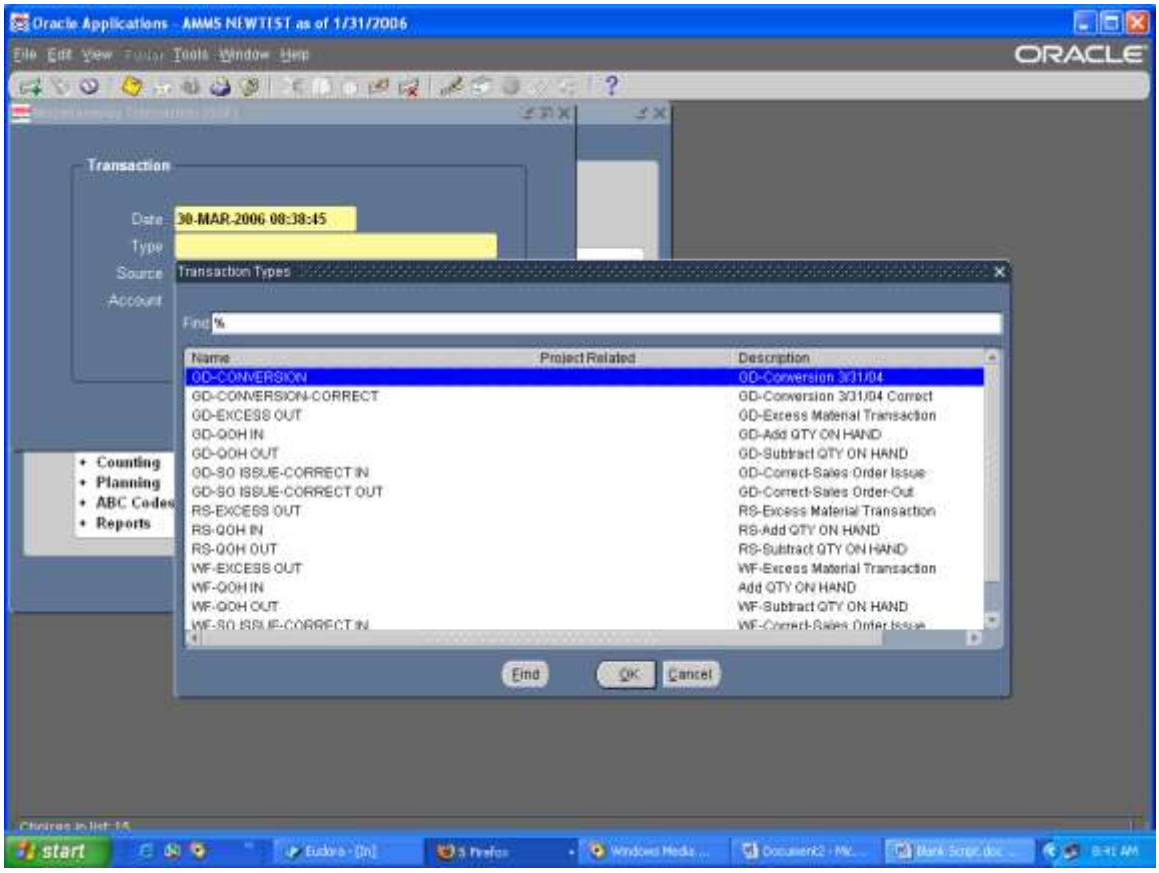
Step Description: Place your curser in the Type field and click on the List of Values (LOV)

Expected Results: Transaction Type window will appear



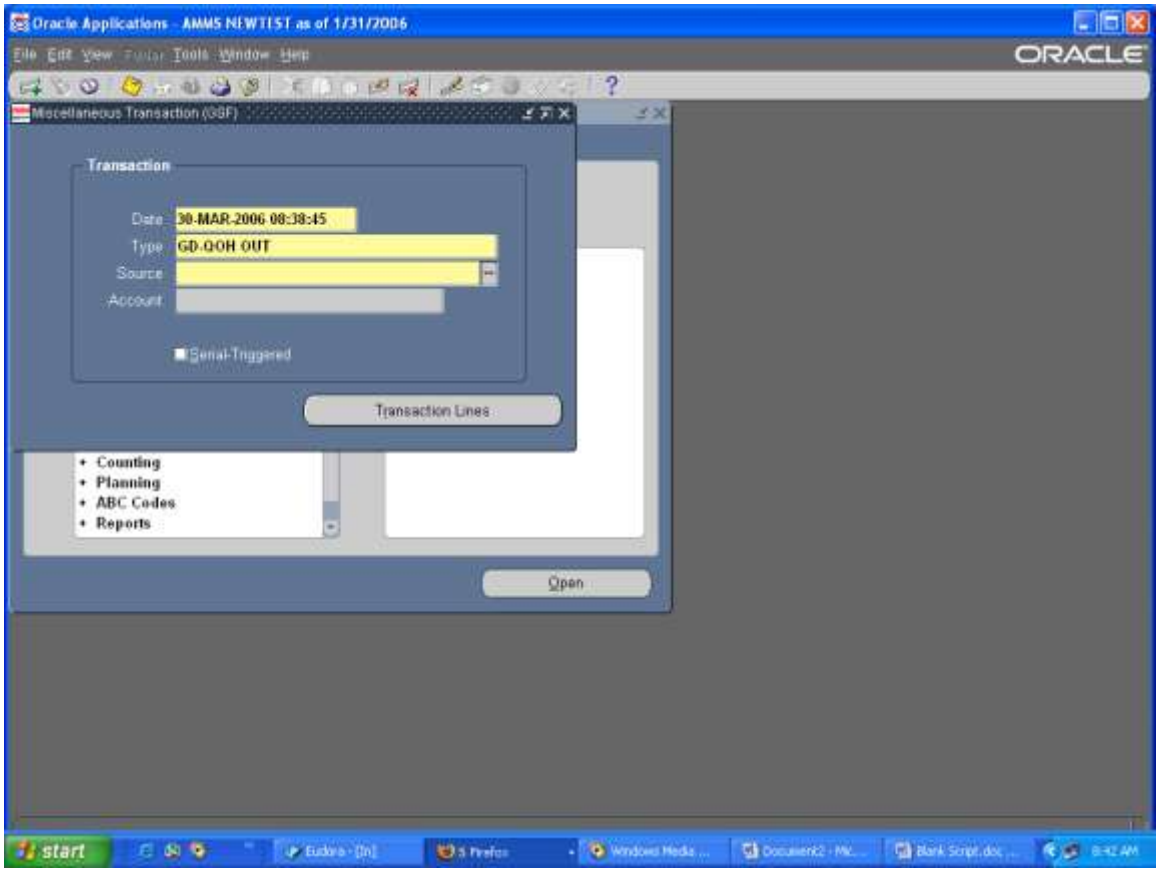
Step Description: Select the appropriate transaction type, if you are doing an adjustment to the on hand balance you must select GD QOH In or Out, this will update the appropriate General Ledger accounts, once you have selected the appropriate transaction type click OK

Expected Results: Return to the Miscellaneous Transactions window



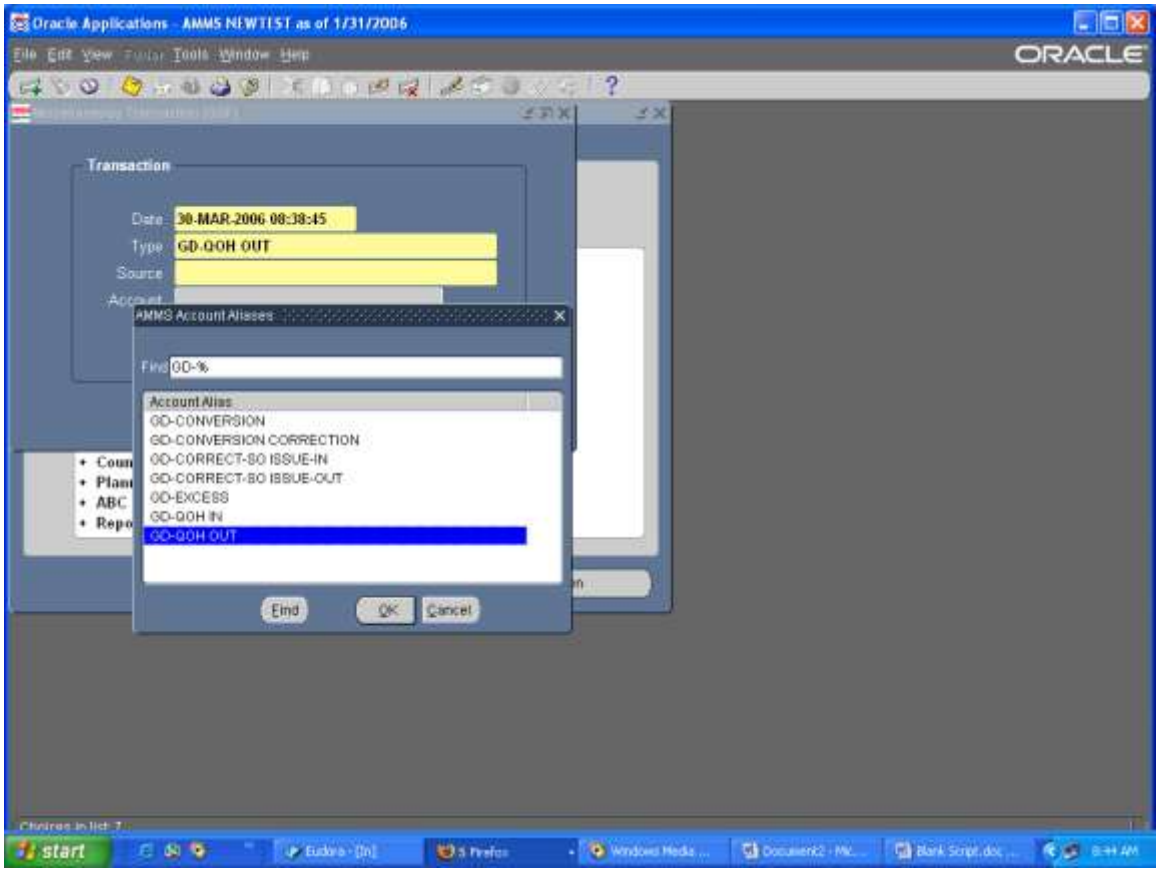
Step Description: Your curser is now in the Source field, click on the LOV

Expected Results: AMMS Account Aliases window will appear



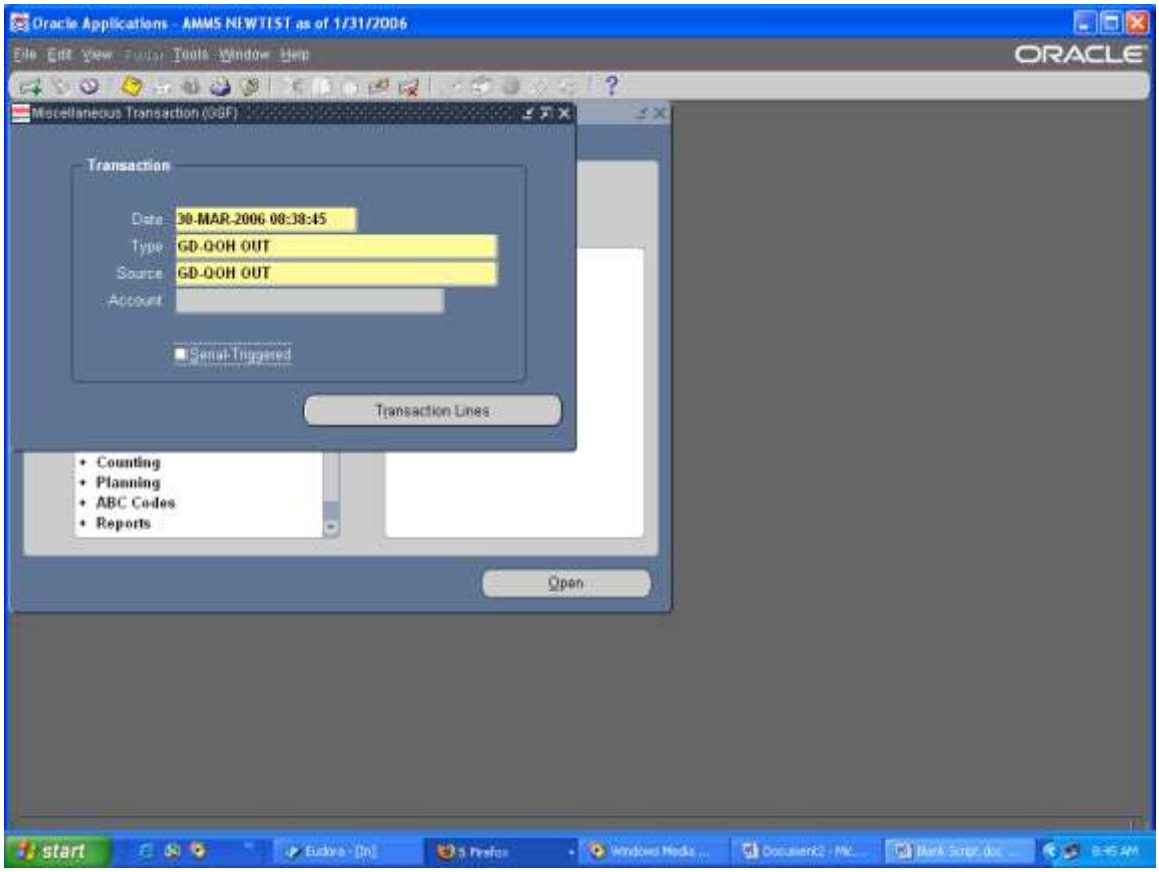
Step Description: Select the AMMS Account Alias that matches the Transactions Type, if you selected GD QOH OUT for transaction type, you must select GD QOH OUT for the AMMS Account Alias, click OK

Expected Results: Return to Miscellaneous Transactions window, Transactions Type and Source field will be populated



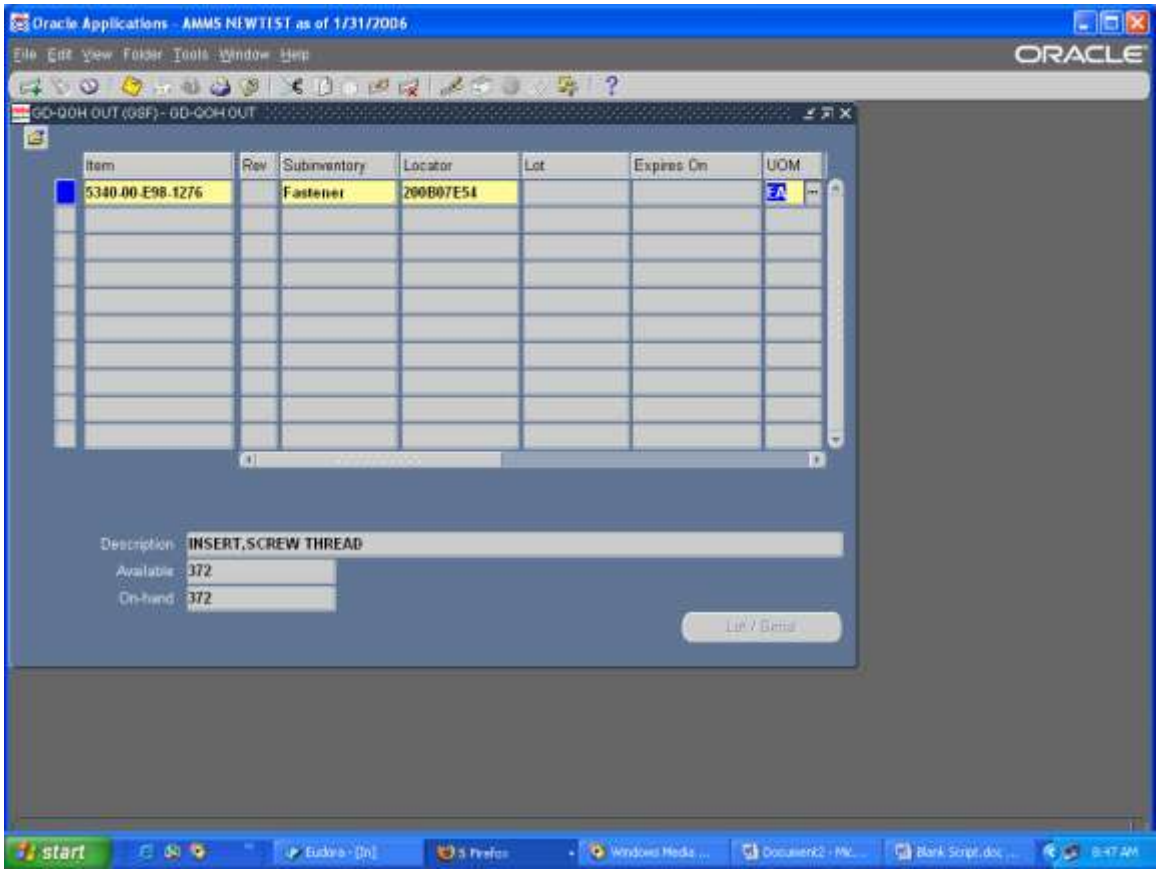
Step Description: Click on the Transaction Lines button

Expected Results: GD QOH OUT window will appear



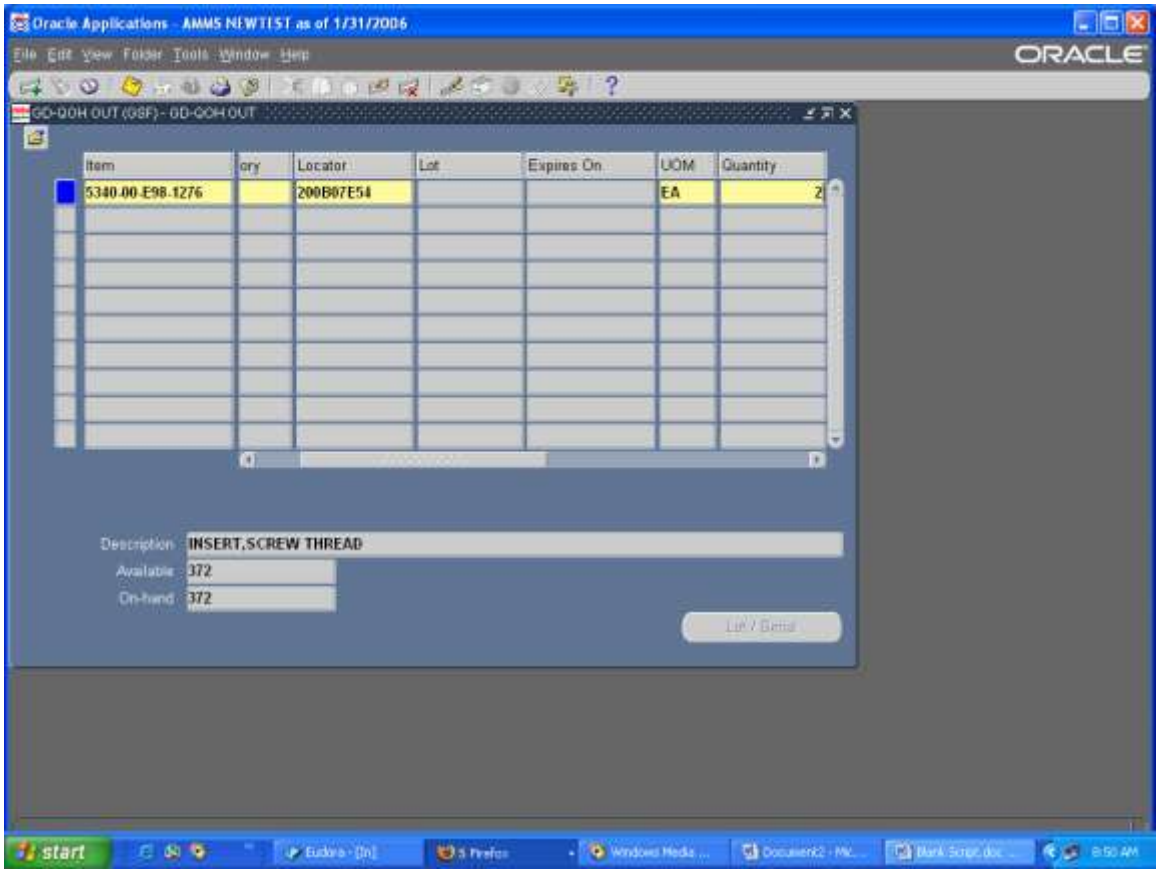
Step Description: Enter the Item number tab, enter the Sub Inventory tab, enter the locator tab.

Expected Results: Field will be populated



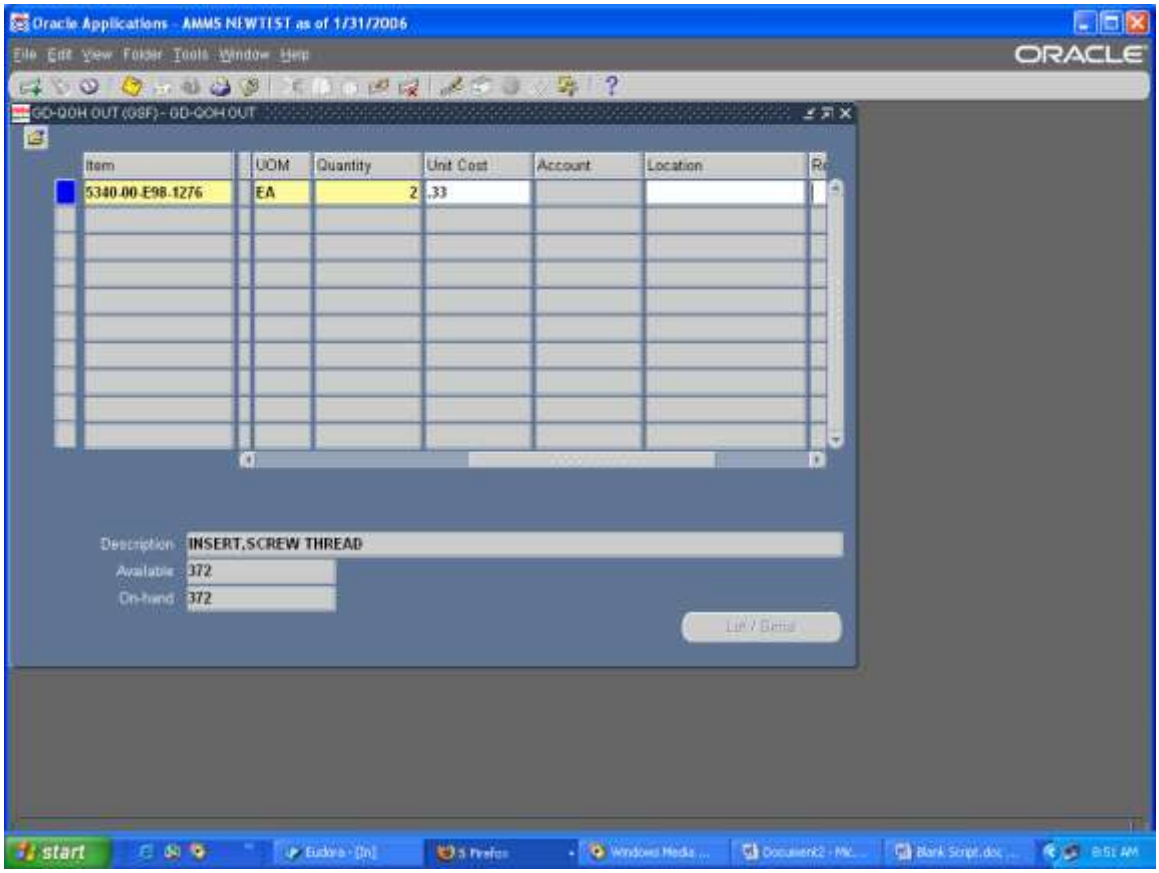
Step Description: Verify the Unit of Issue tab, enter the quantity to be adjusted. Verify at the bottom of the screen that the quantity to be adjusted is Available.

Expected Results: Fields will be populated



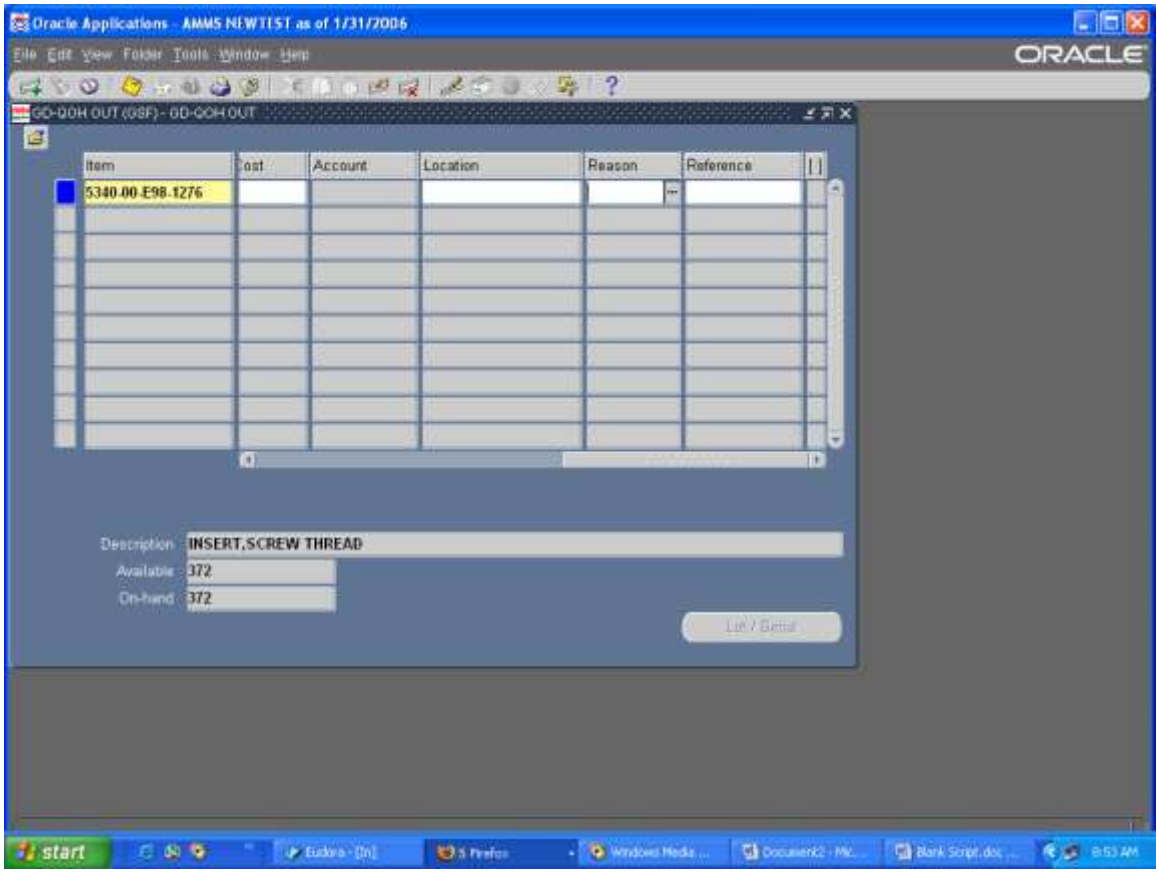
Step Description: In the Unit Cost field, enter the cost for the item you are adjusting, tab to the Reason field

Expected Results: Field will be populated



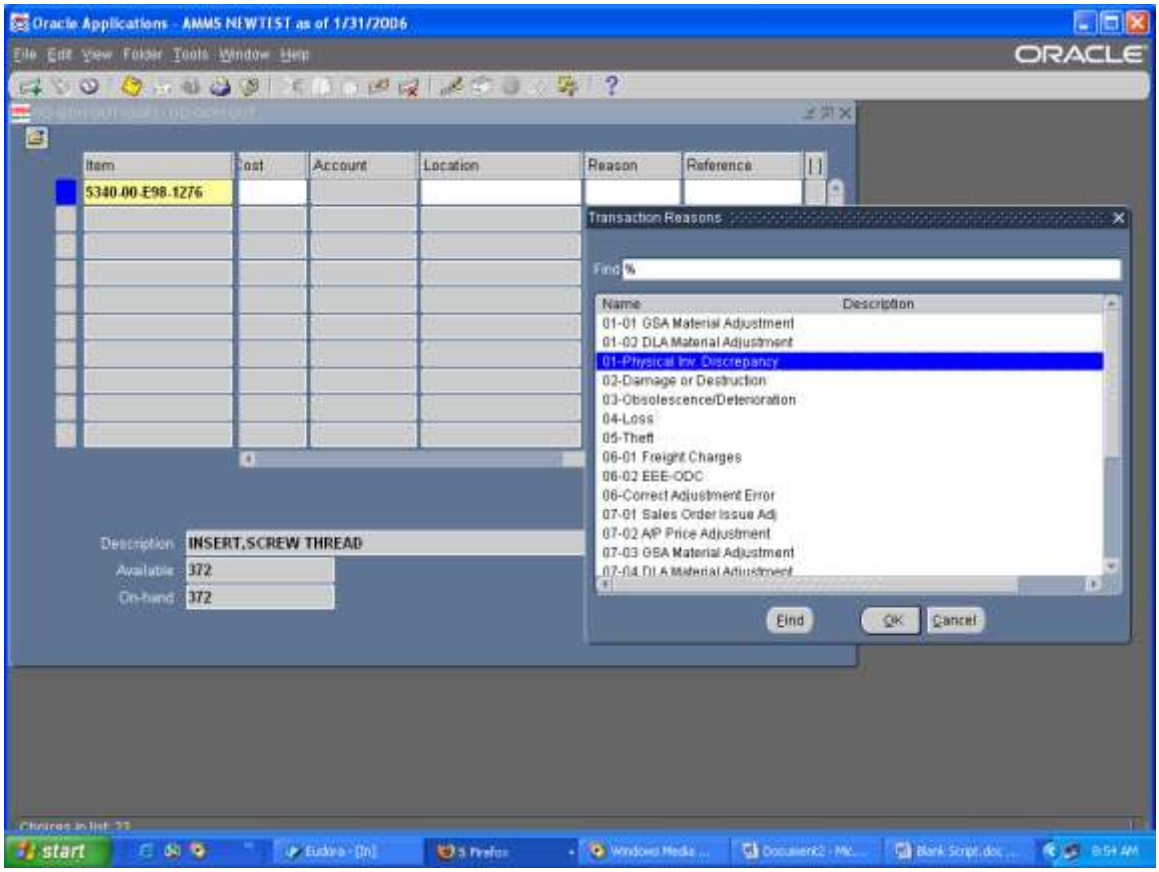
Step Description: In the Reason field click on the LOV

Expected Results: Transaction Reasons window will appear



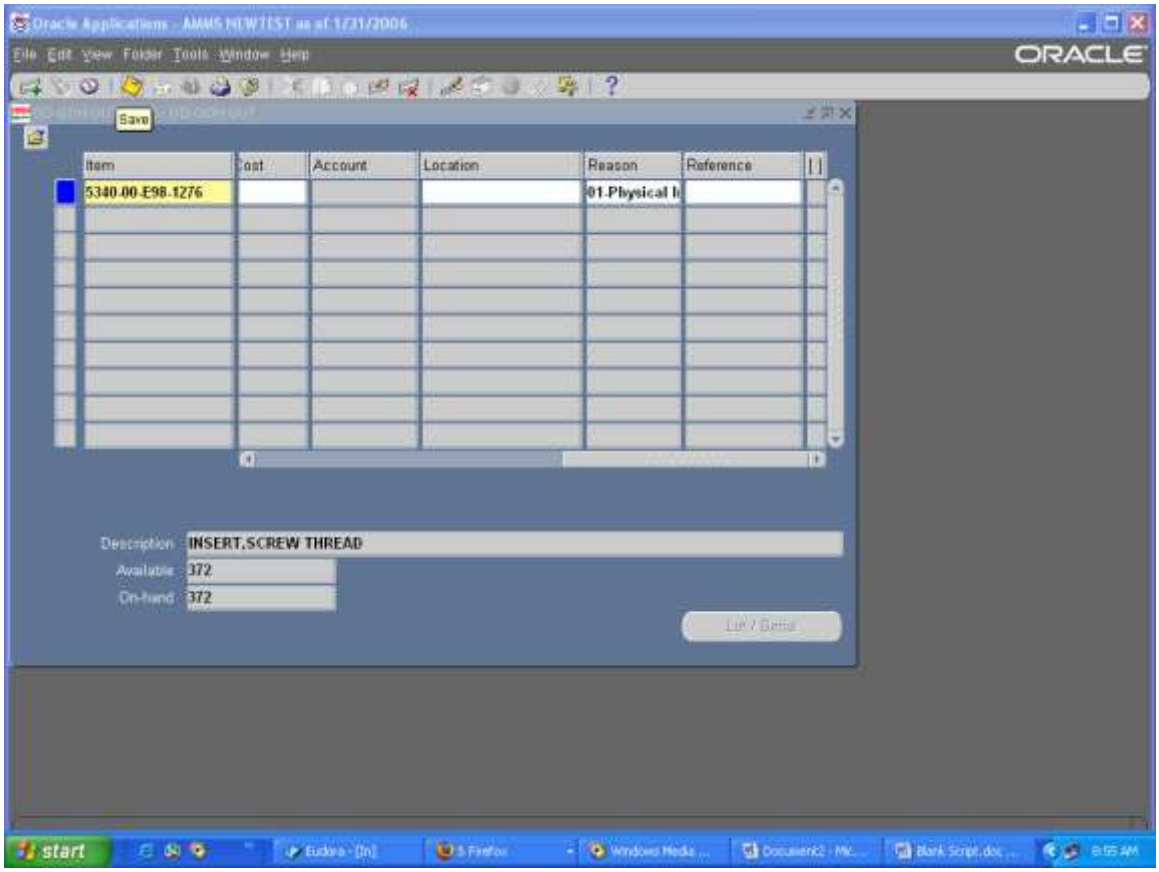
Step Description: Select the appropriate reason for your adjustment, click OK

Expected Results: Reason field will be populated



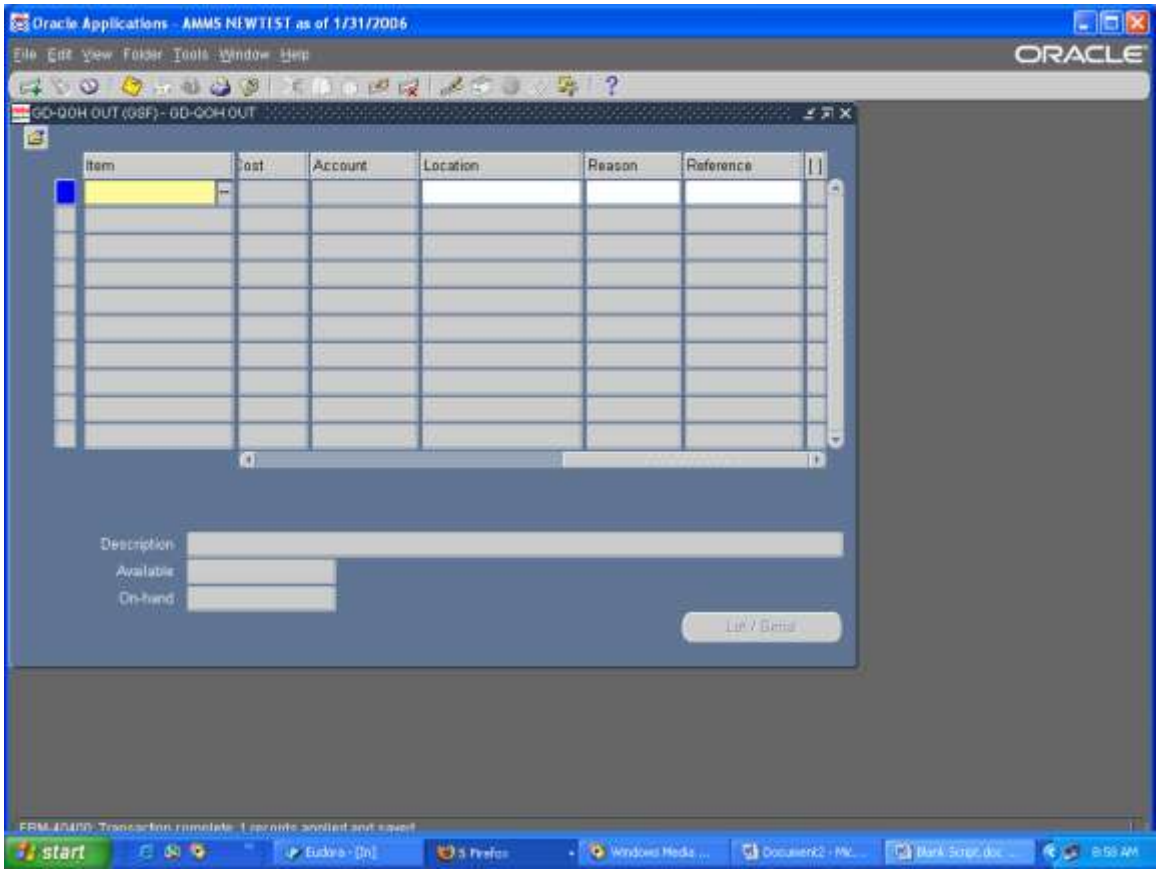
Step Description: Click on the Save icon

Expected Results: Transactions Saved and Applied message



Step Description: Transaction Complete

Expected Results: Blank Screen



AMMS TRAINING SCRIPT

Printing Receipt Traveler (reprint receipts for PO)

Purpose

The purpose of this training script is to give instruction on how to reprint a Receipt Traveler, receipt of item in Oracle

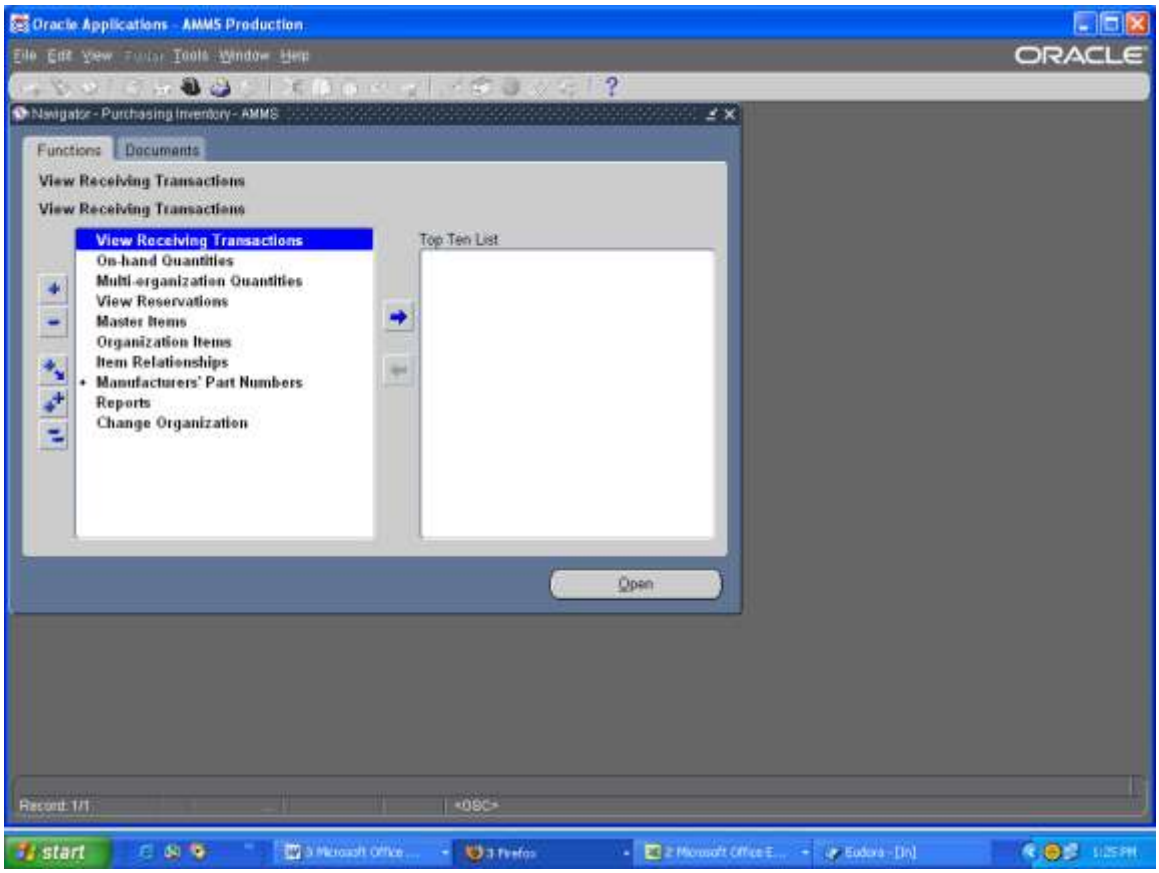
Audience

Buyers

Prepared By	Theresa Coulson
Creation Date:	10/24/2006
Document Name	Print Receipt Traveler Report.doc
Version	2
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Inventory.	

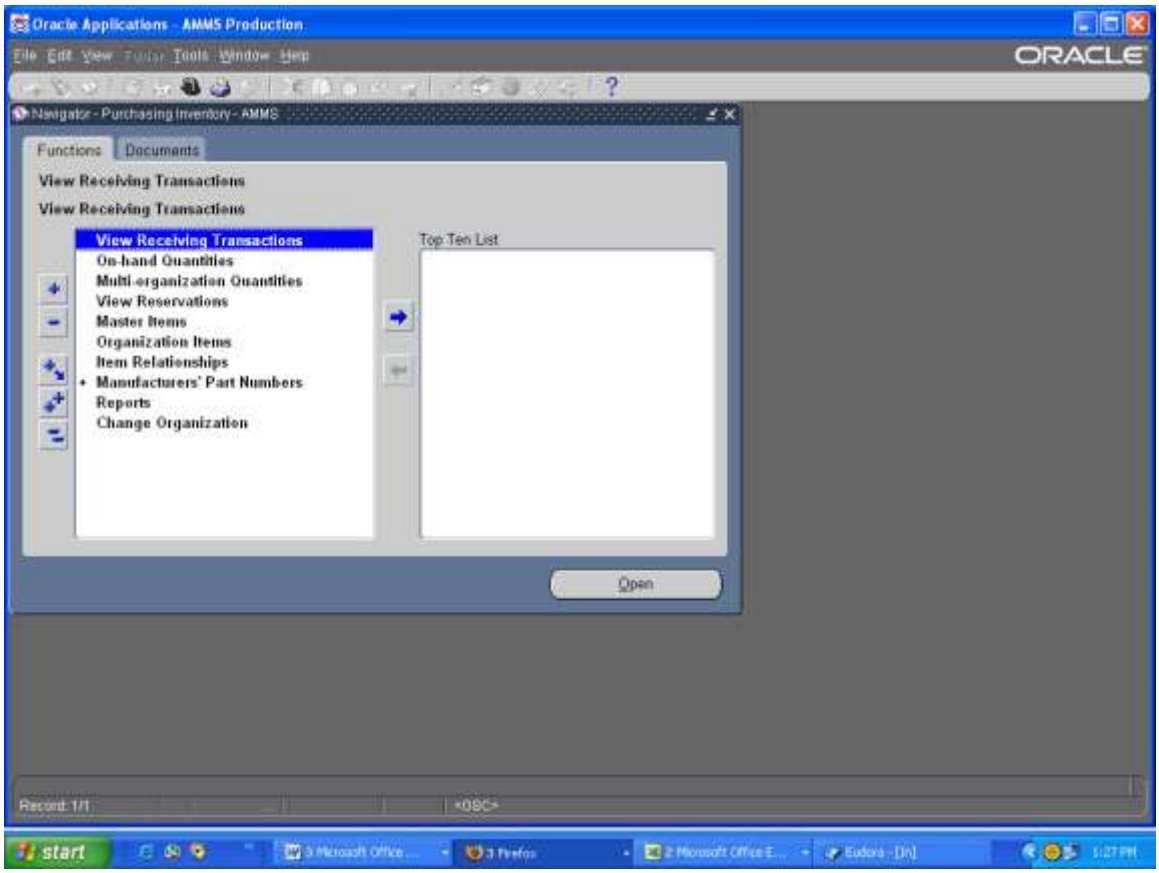
Step Description: Sign onto Oracle and select Purchasing Inventory AMMS responsibility

Expected Results: Purchasing Inventory AMMS main menu will appear



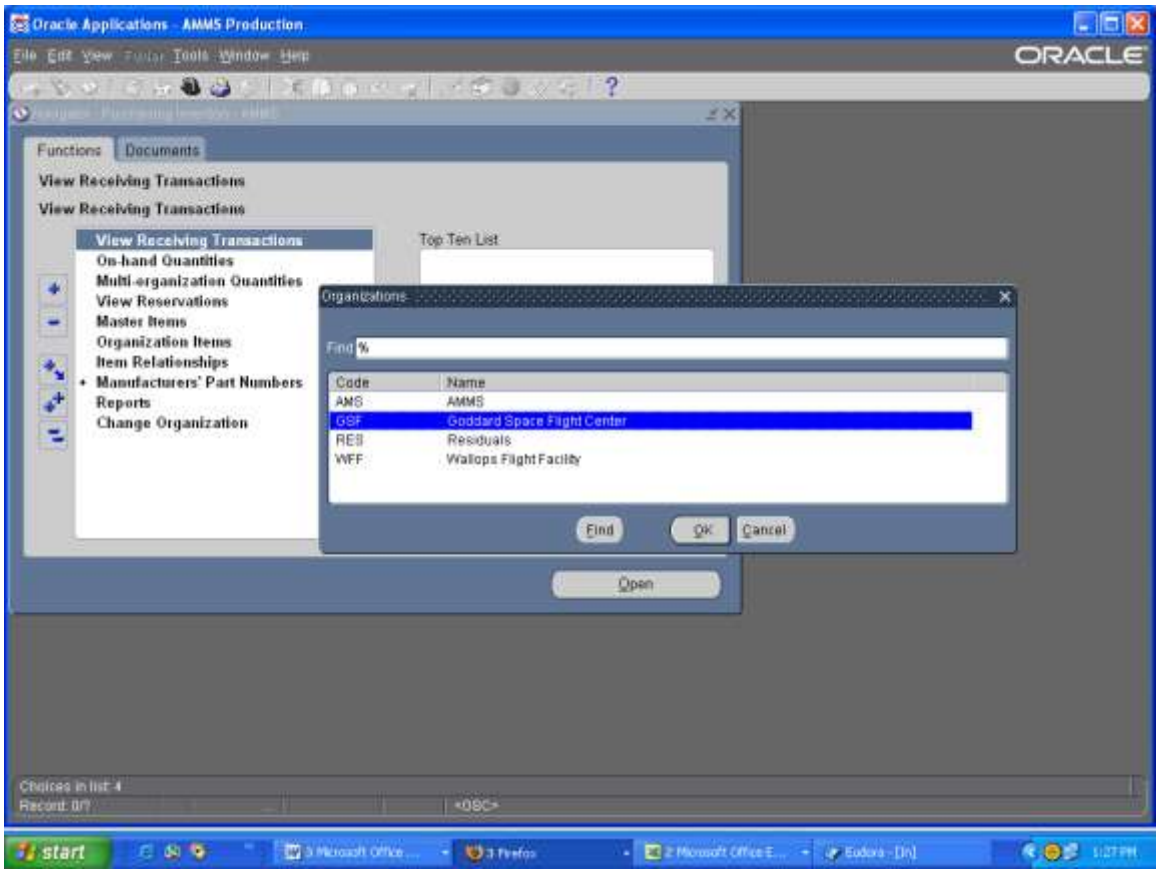
Step Description: From the Purchasing Inventory AMMS main menu select View Receiving Transactions, click on the open button

Expected Results: Organizations window will appear



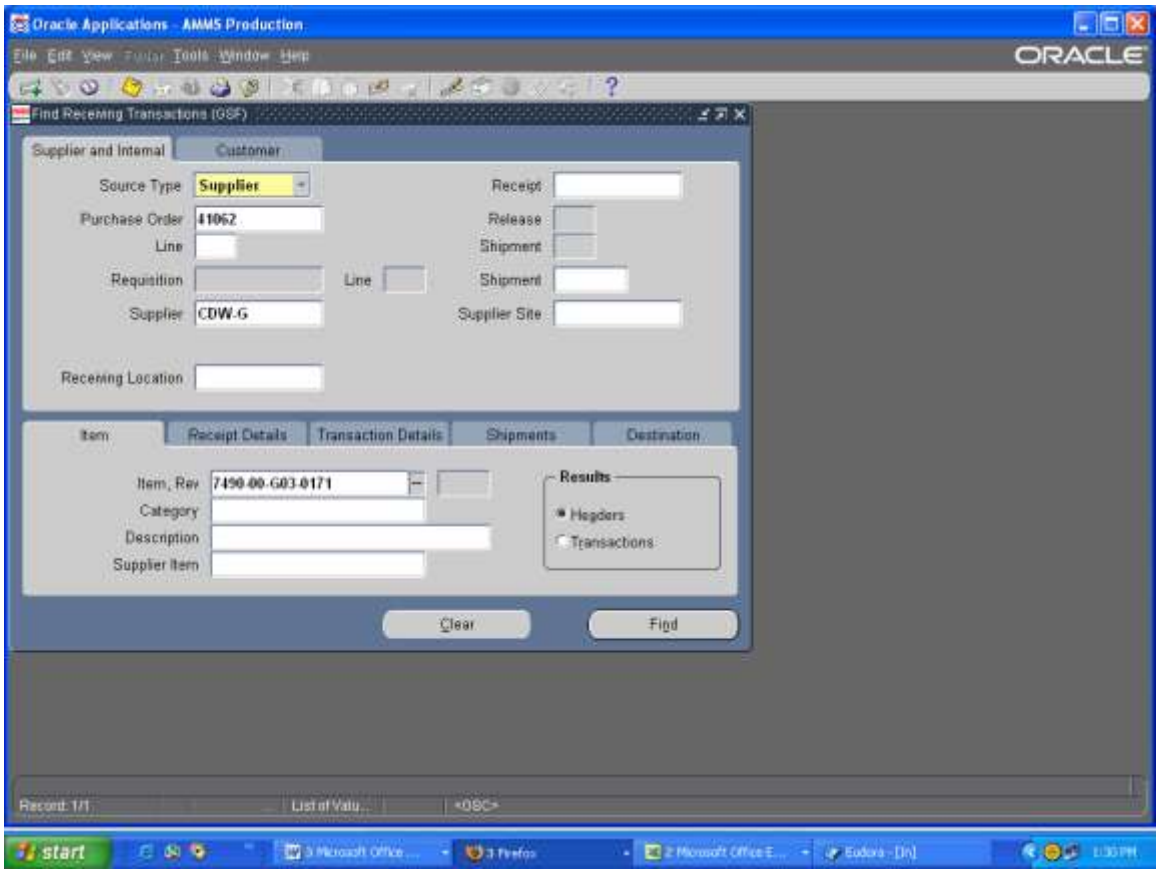
Step Description: From the Organizations window select the appropriate organization, GSF for Goddard, WFF for Wallops

Expected Results: Find Receiving Transactions window will open



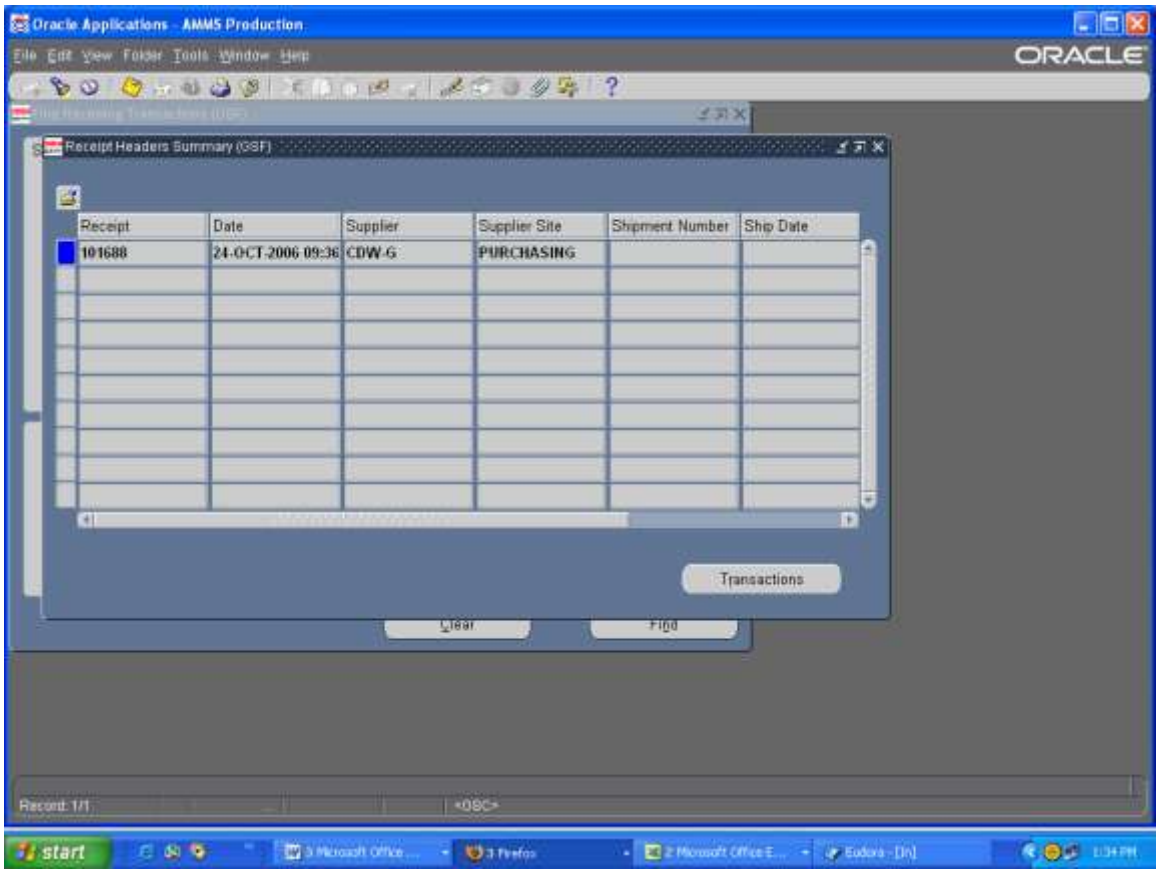
Step Description: In the Purchase Order field enter the purchase order number, if able enter the item number in the Item/Rev field, click on the Find button

Expected Results: Receipt Header Summary window will open



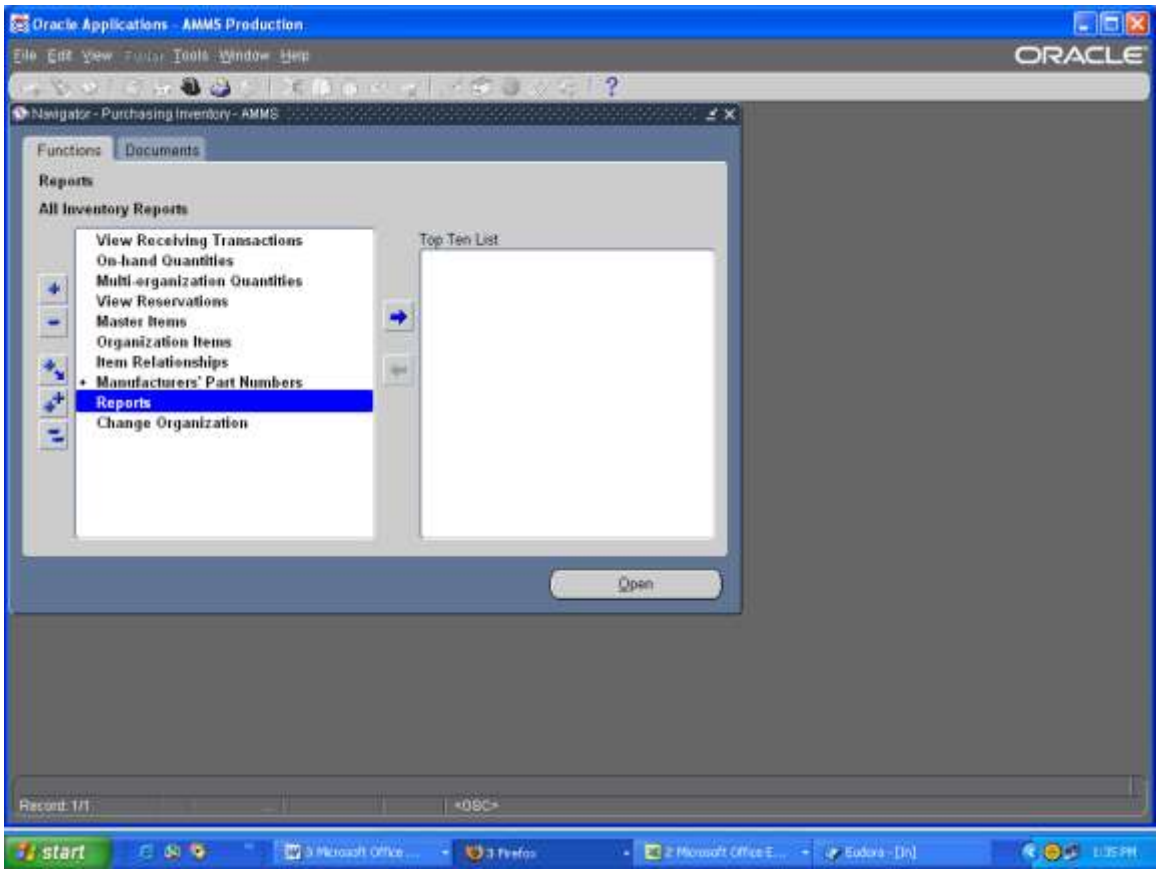
Step Description: Write down the Receipt Number, this is the first column, you will need this number to run the report. Close the Receipt Header Summary window

Expected Results: Return to Purchasing Inventory AMMS main menu



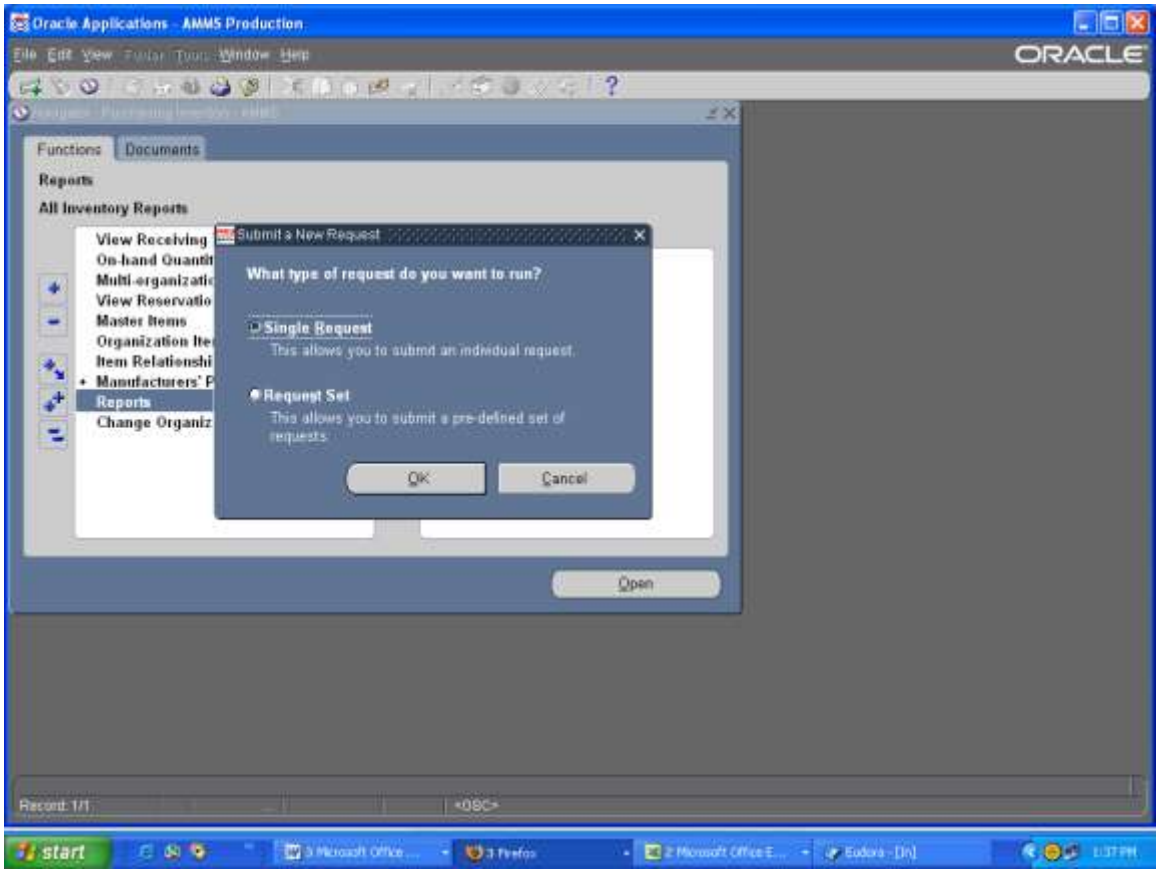
Step Description: From the Purchasing Inventory AMMS main menu select Reports, click on the Open button

Expected Results: Submit a New Request window will appear



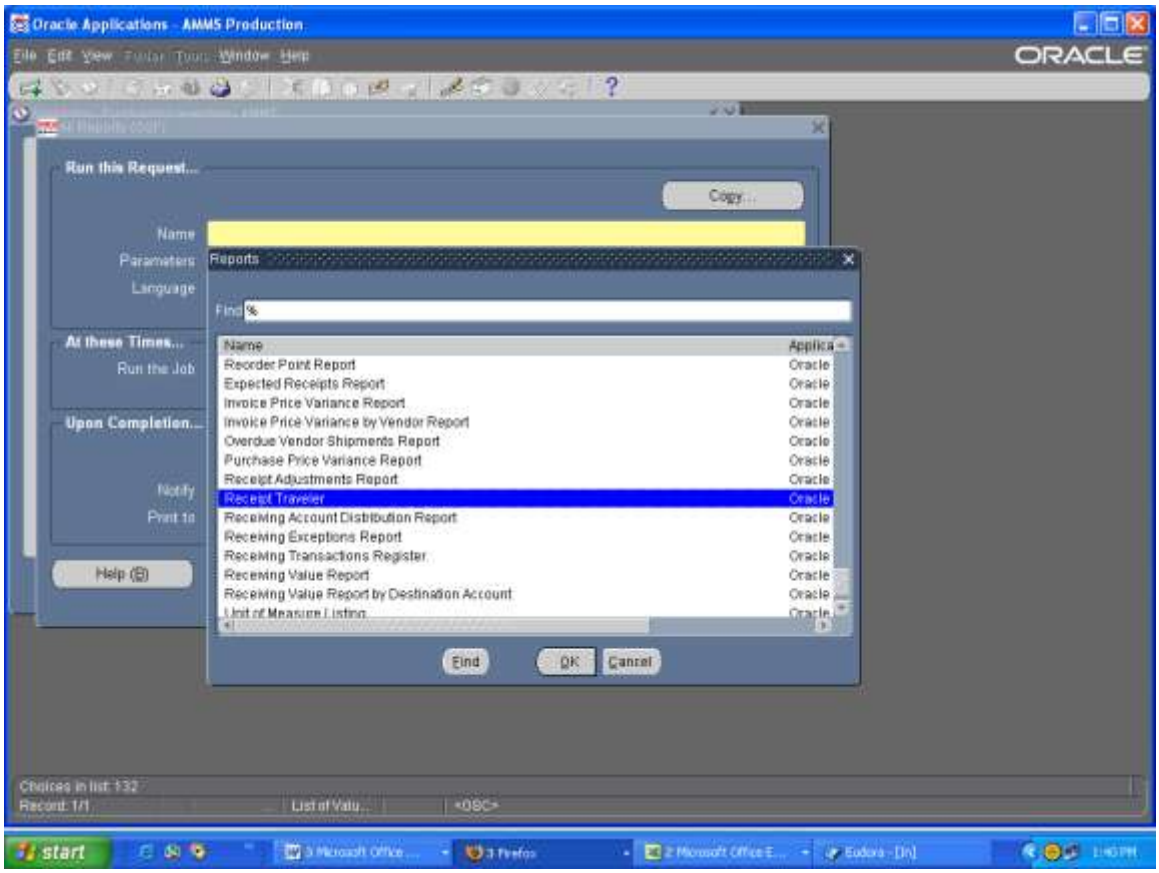
Step Description: In the Submit a New Request window select Single Request, click OK

Expected Results: All Reports window will open



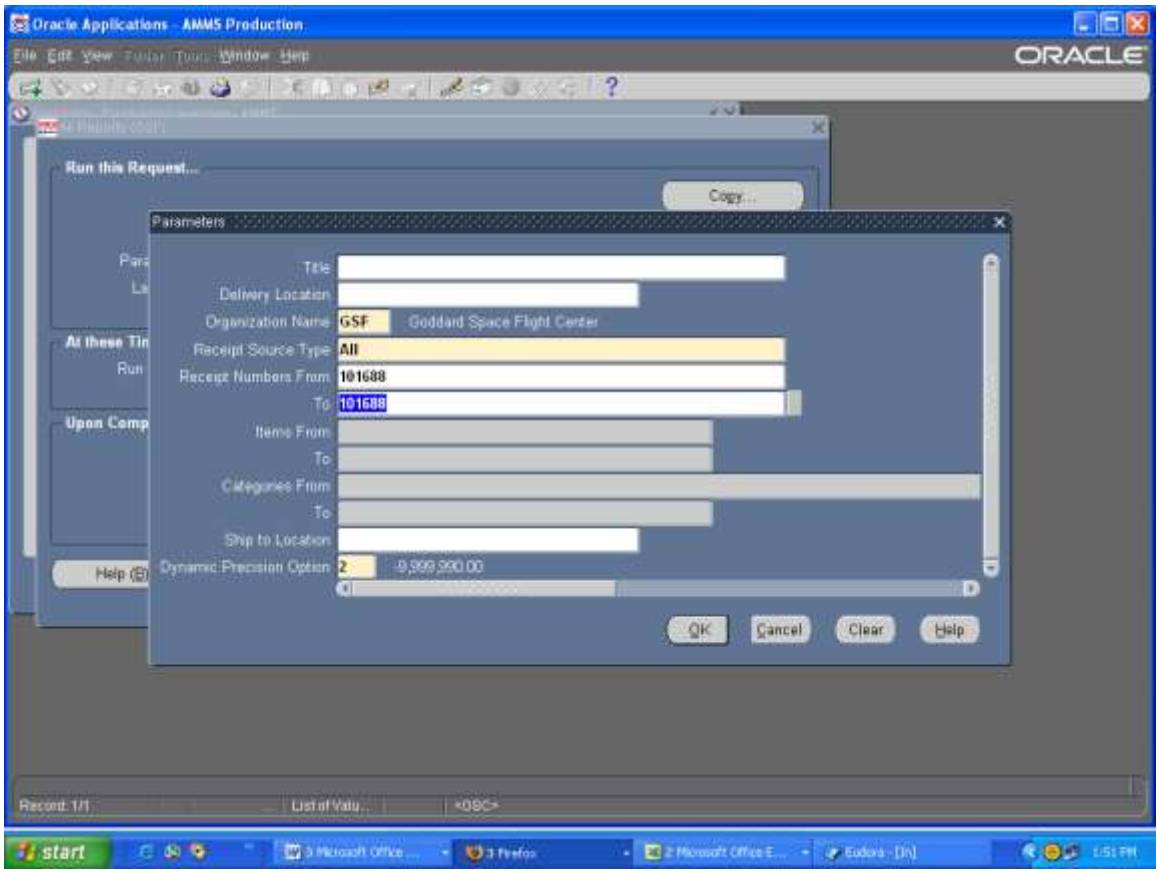
Step Description: In the Name field click on the List of Values (LOV) and find Receipt Traveler, highlight Receipt Traveler and click OK to Reports window

Expected Results: Parameters window will appear



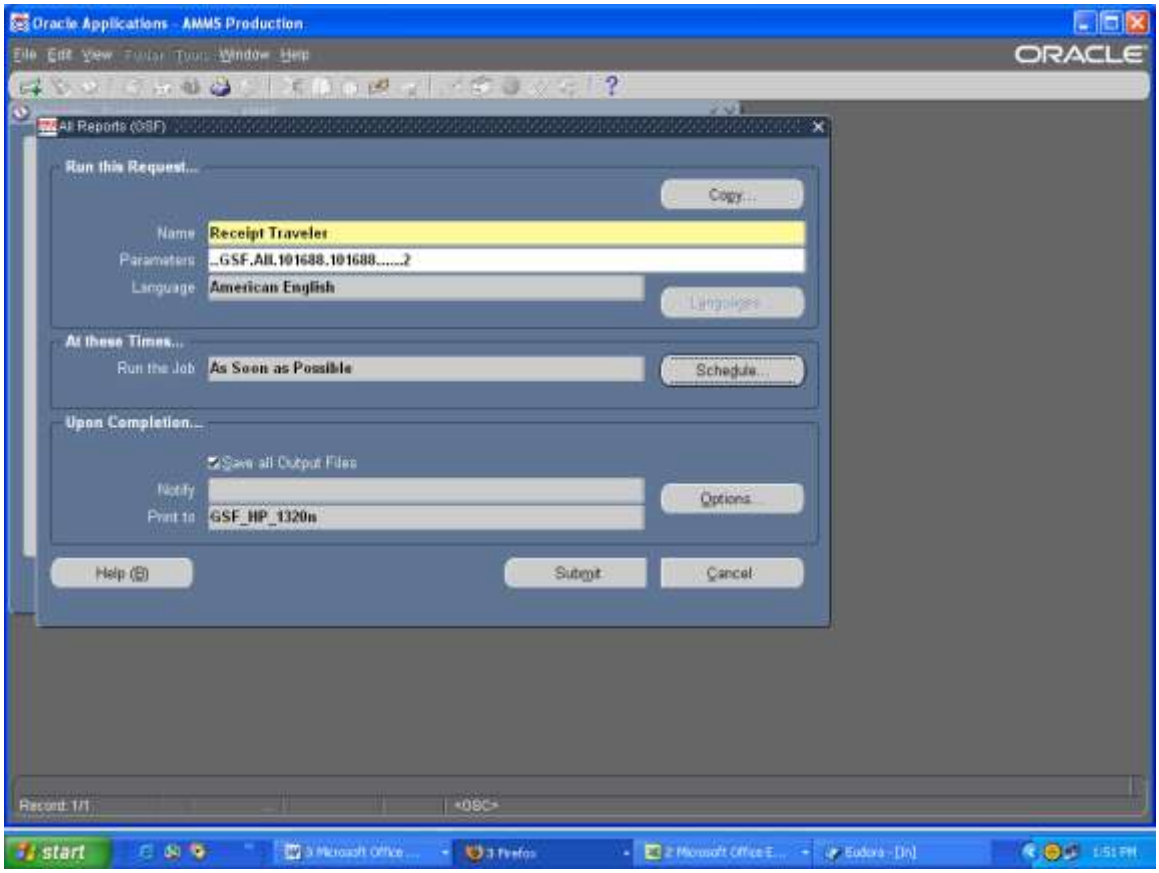
Step Description: At the Parameters window, in the Organization Name enter the appropriate organization name, in the Receipt Number From field enter the receipt number, enter the same number in the Receipt Number To field, click OK to the Parameters window

Expected Results: Return to All Reports window



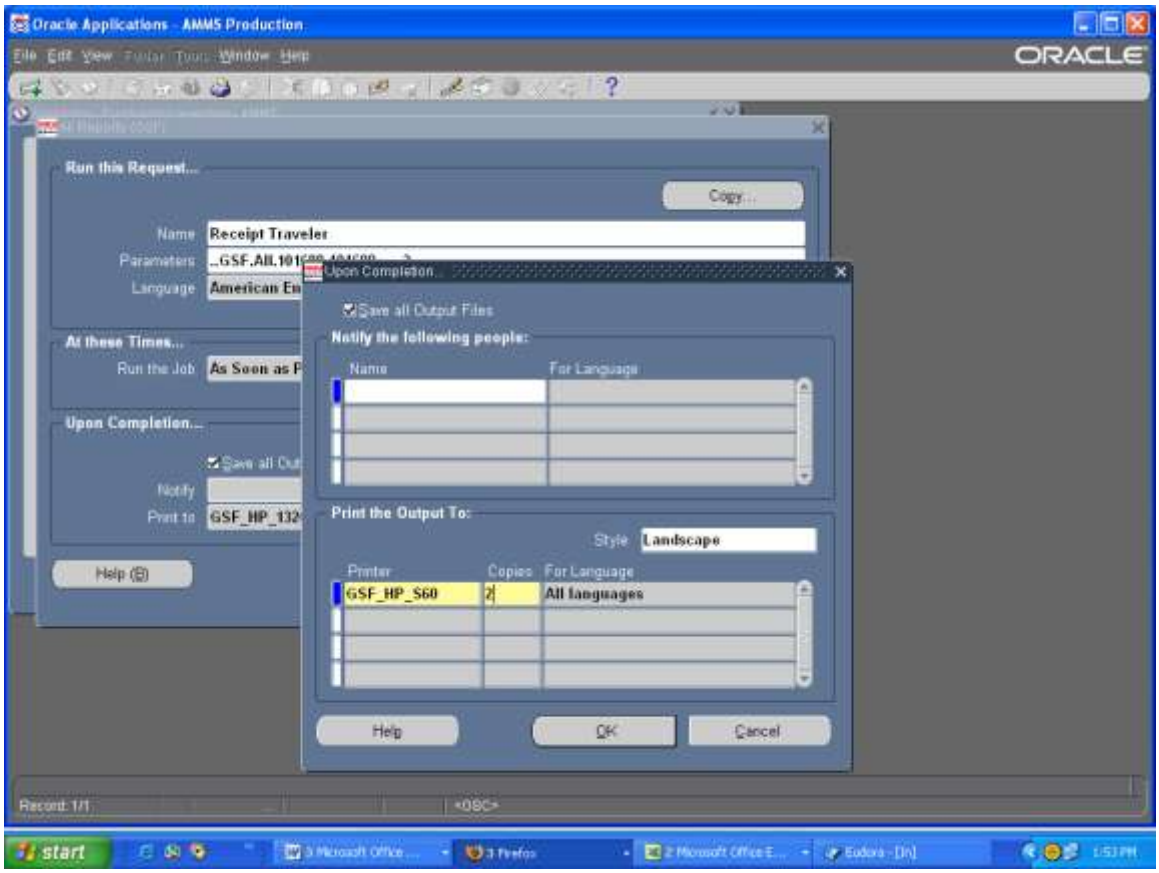
Step Description: Click on the Options button

Expected Results: Upon Completion window will appear



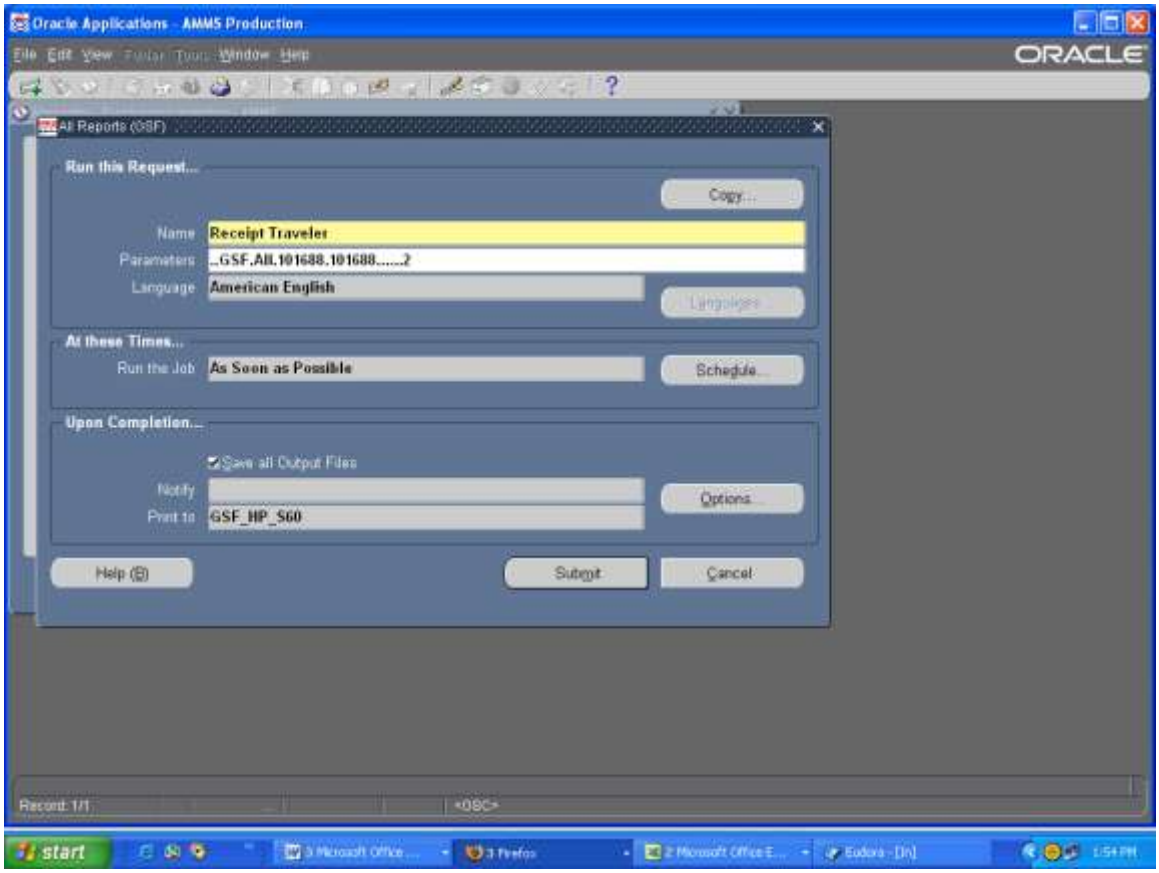
Step Description: In the Printer field click on the LOV and select a printer, in the copies field indicate the number of copies wanted. Click OK to the Upon Completion window

Expected Results: Return to All Reports window



Step Description: Click on Submit

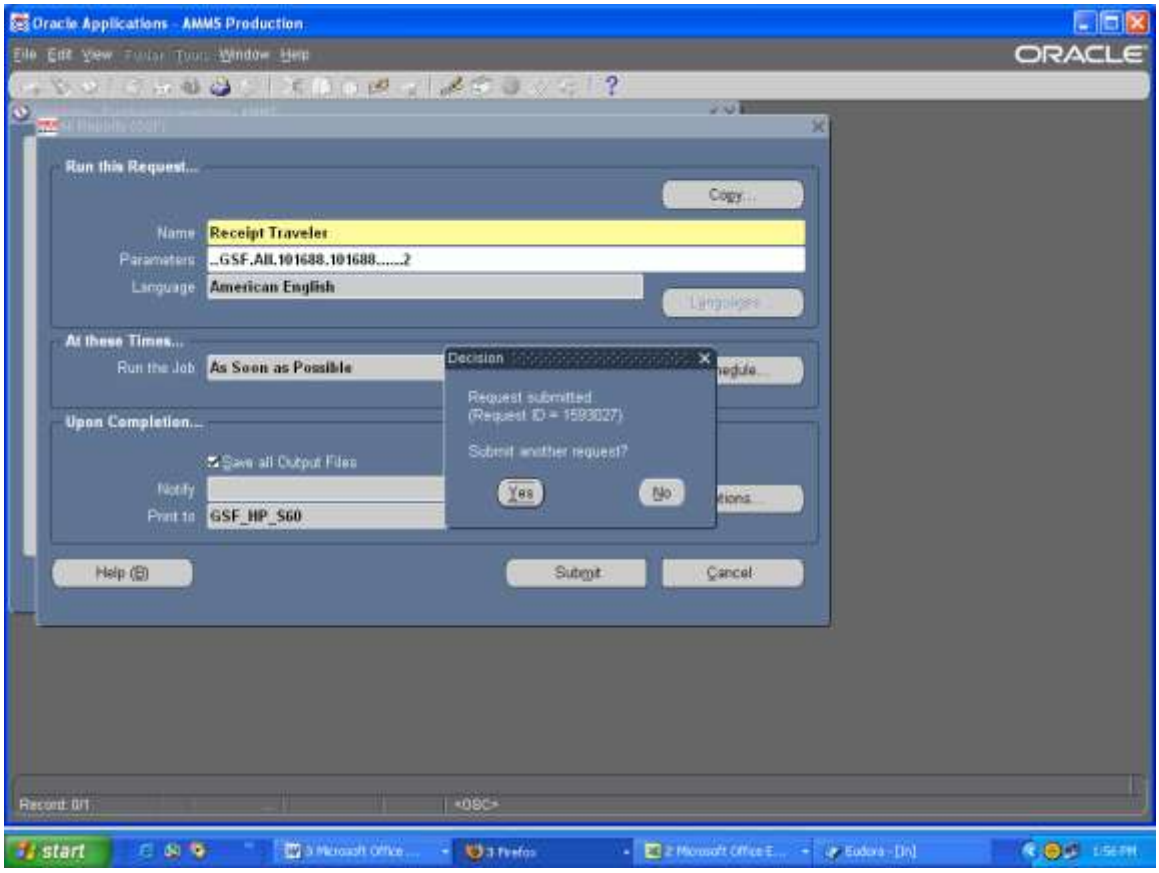
Expected Results: Decision window will appear



Step Description: The Decision window will give the Request ID number, and ask if you want to submit a new request. If you click Yes, you can submit a new report request, if you click no you will return to the Purchasing Inventory AMMS main menu

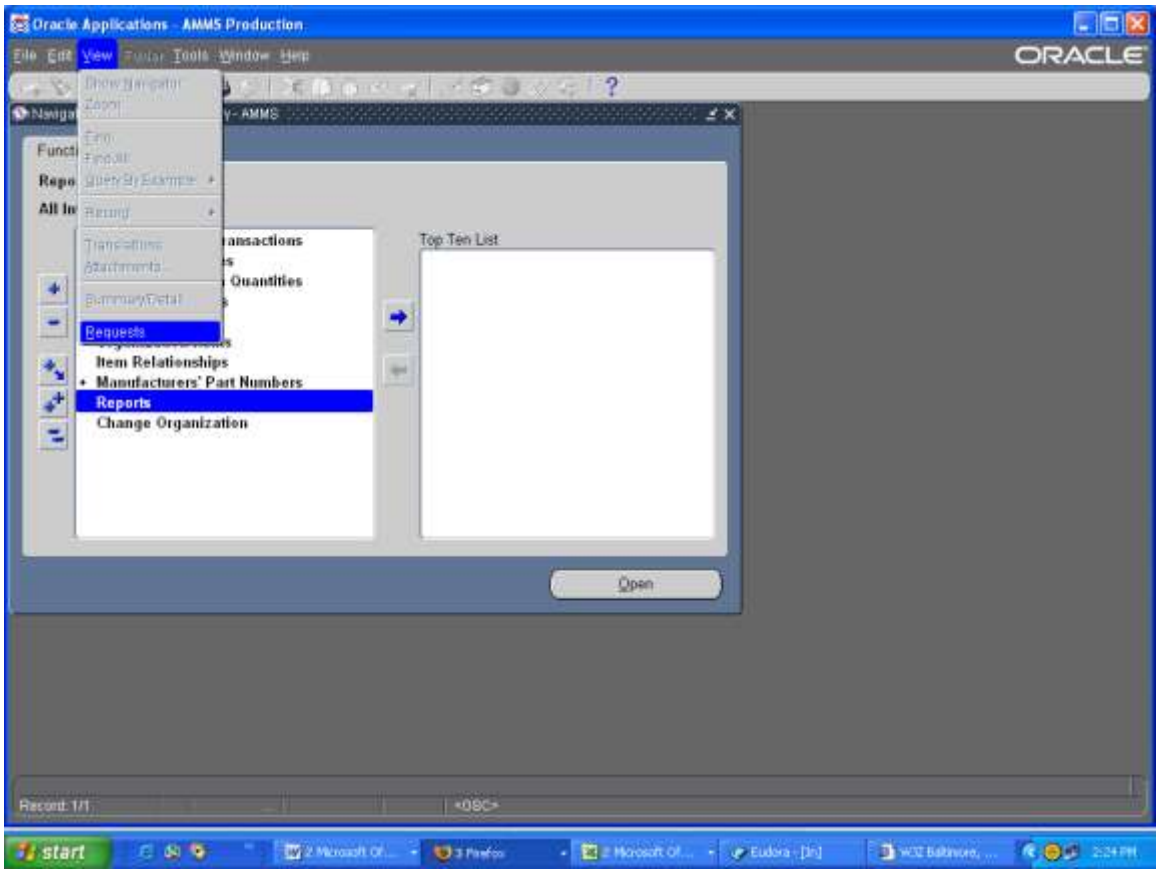
No was selected

Expected Results: Return to Purchasing Inventory AMMS main menu



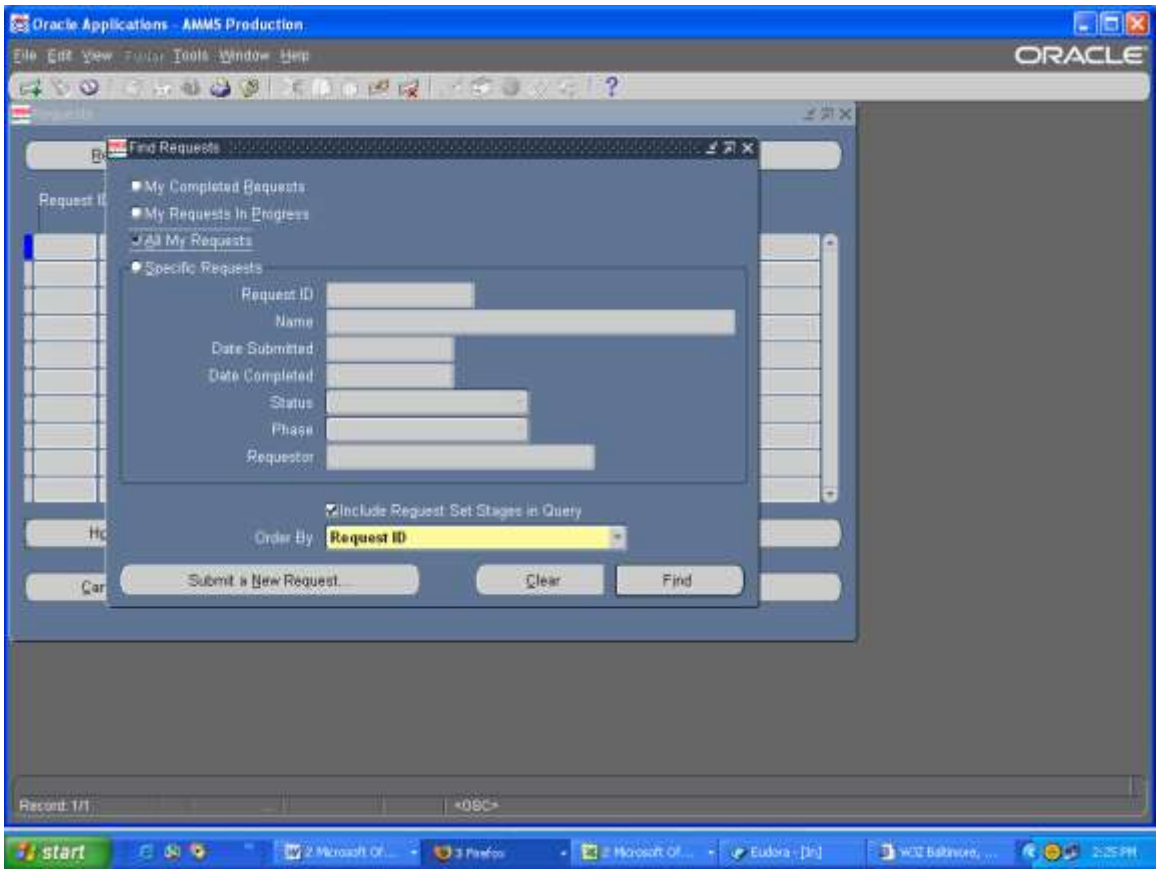
Step Description: To see submitted tasks, from the Toolbar select View > Requests

Expected Results: Find Request window will appear



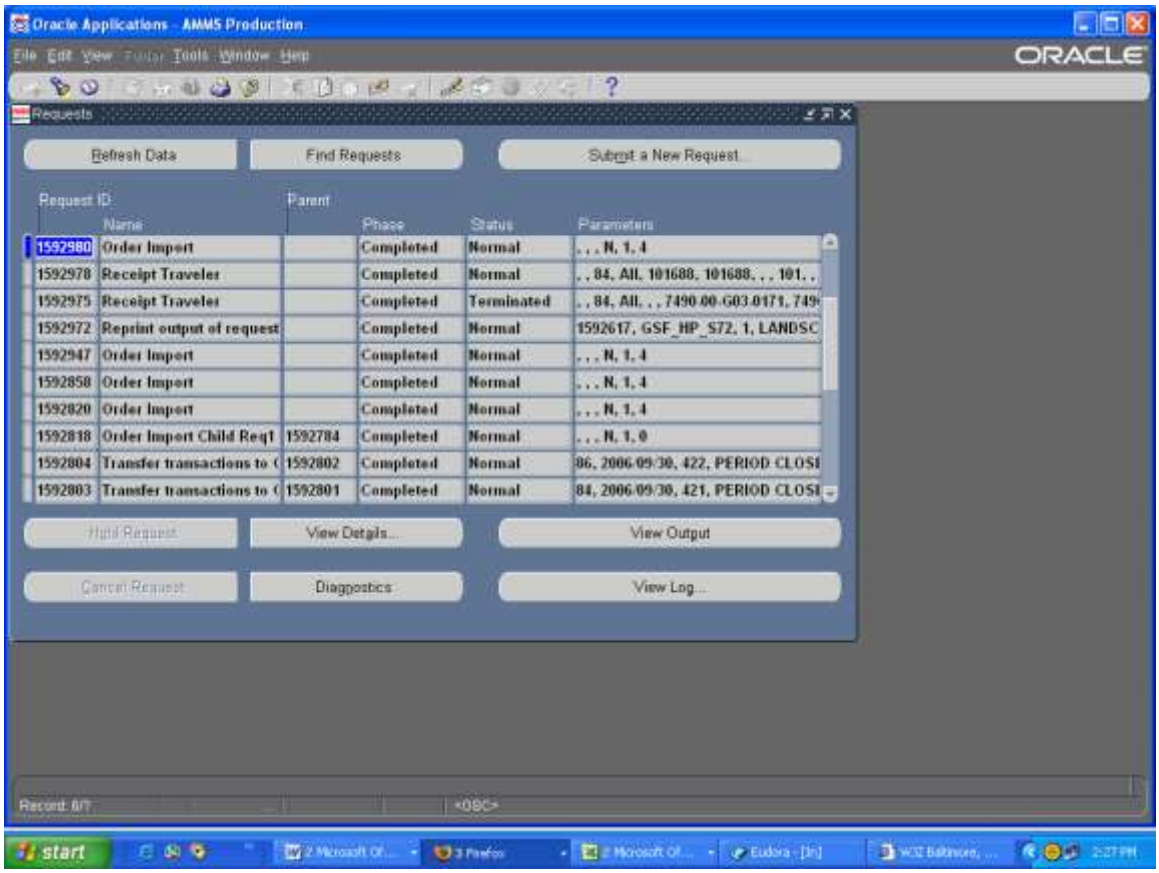
Step Description: At the Find Request window click Find

Expected Results: Request window will appear



Step Description: This will show you all of your tasks submitted. If status is anything other than Completed Normal, click the Refresh Data button to update the status

Expected Results: All tasks completed normal, report should print



AMMS TRAINING SCRIPT

PROCESSING A JIT RMA

"CUSTOMER RETURN"

Purpose

The purpose of this training script is to give instructions on how to process a return of material by the customer for a JIT item

Audience

Material Coordinators and Supply Technician Leads

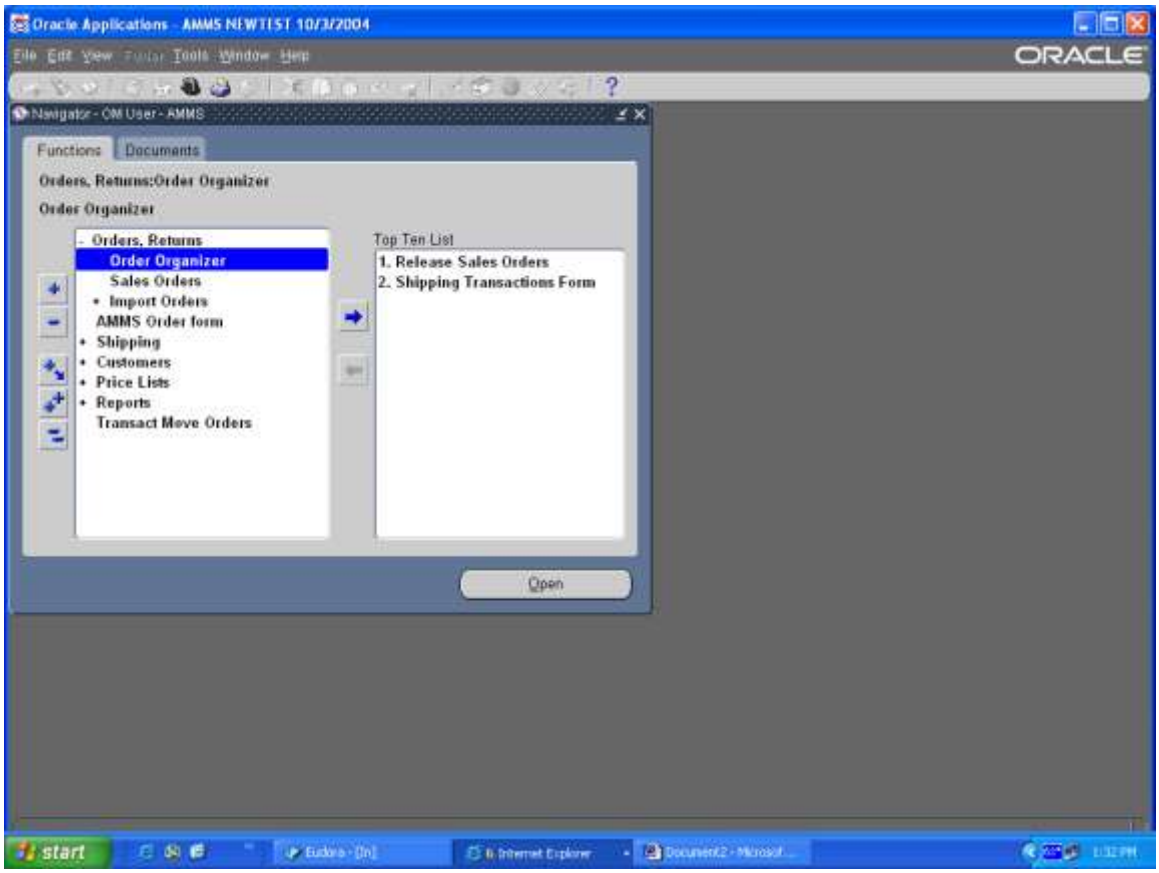
Prepared By	Theresa Coulson
Creation Date:	09/24/2004
Document Name	Processing a JIT RMA.doc
Version	3
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Inventory.	

Step Description: Sign onto Oracle applications and select the OM User responsibility

Expected Results: The OM User main menu will appear.

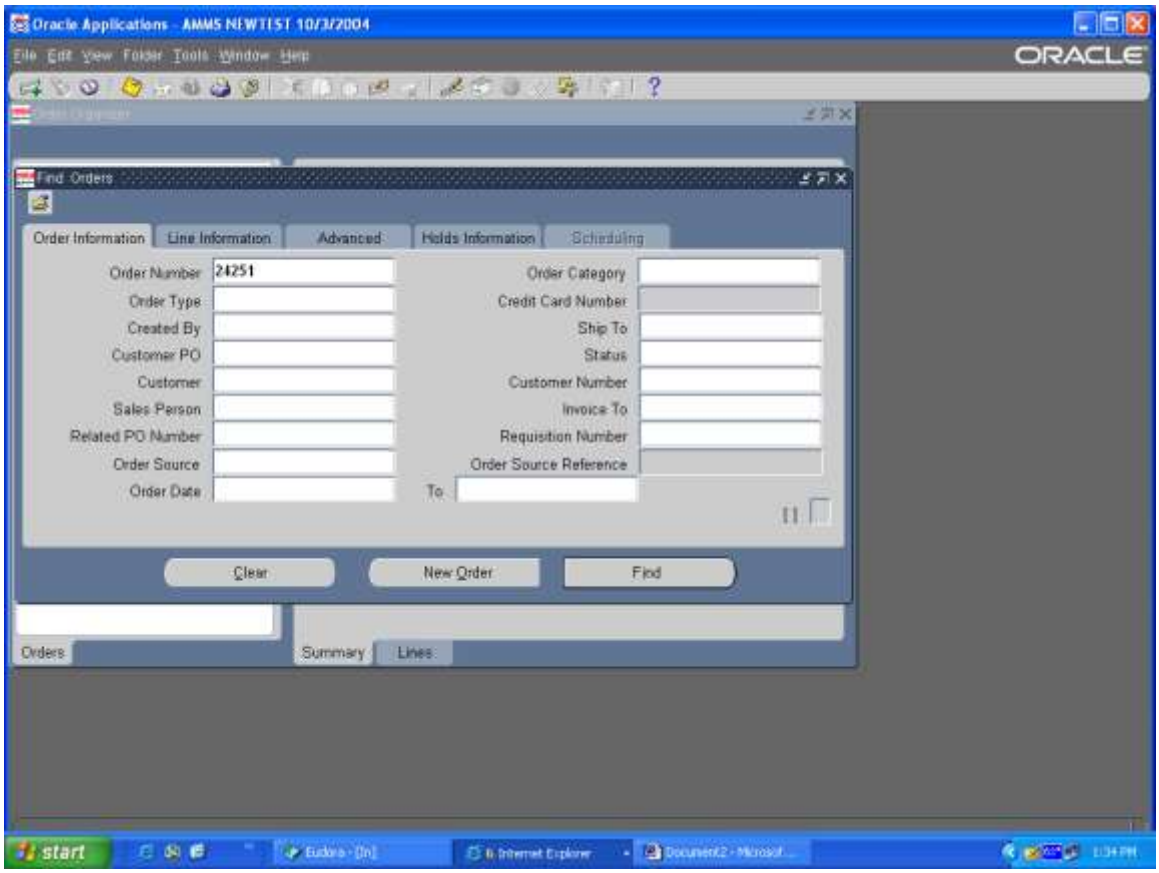
Step Description: From the OM User Main Menu select Order Returns > Order Organizer

Expected Results: The Find Orders screen will appear.



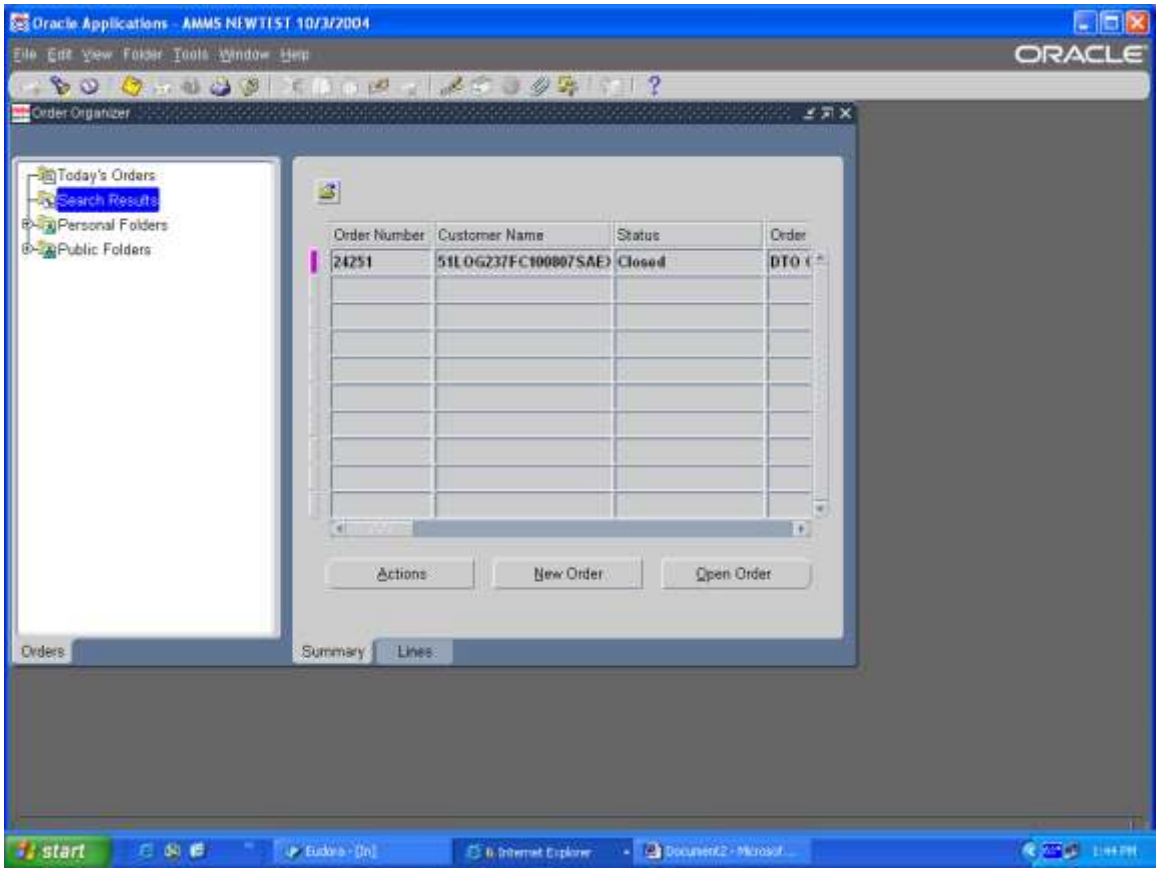
Step Description: Enter the sales order number or any other numbers you have to find the sales order. Click on the Find button.

Expected Results: The Order Organizer screen will appear.



Step Description: Click on the Open button at the bottom right of the screen

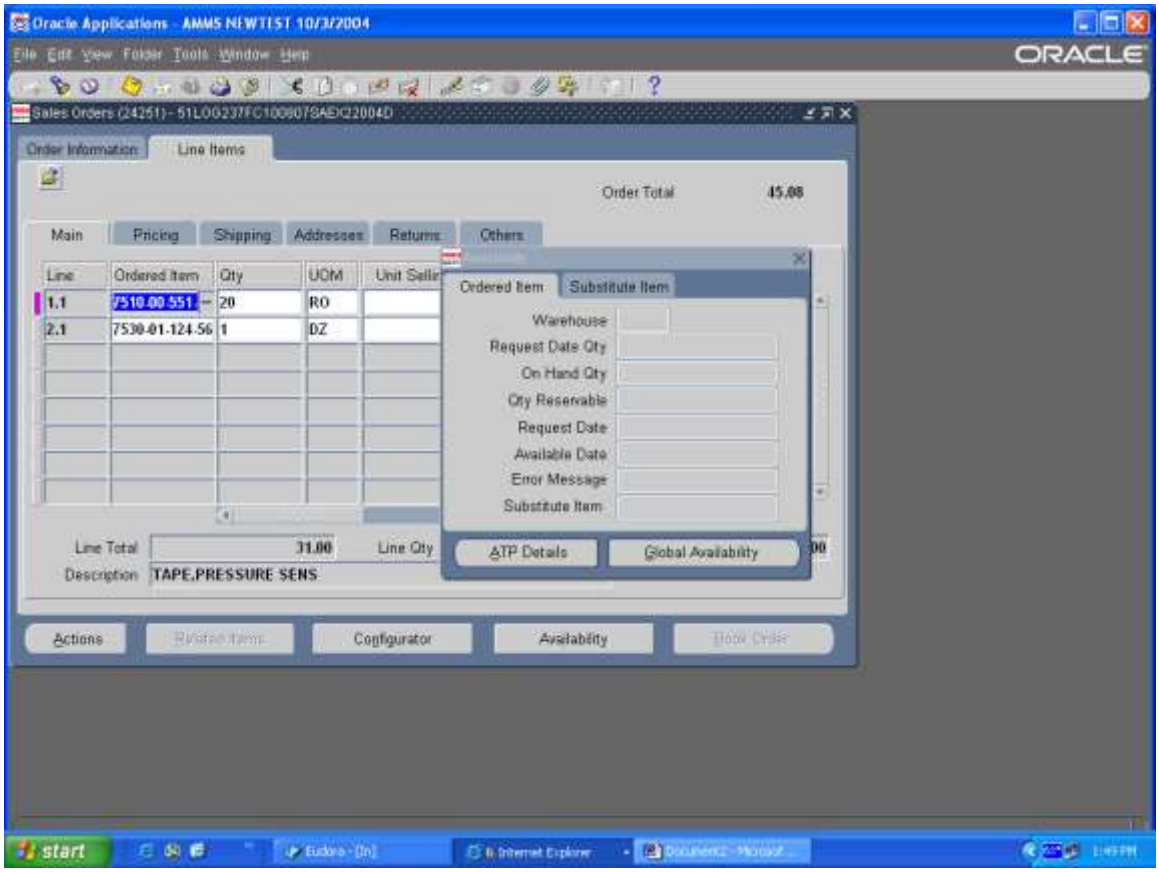
Expected Results: The Sales Order screen will appear.



Step Description: Verify that this is the correct sales order by looking at the customers name.

Step Description: Click on the Line Items Tab

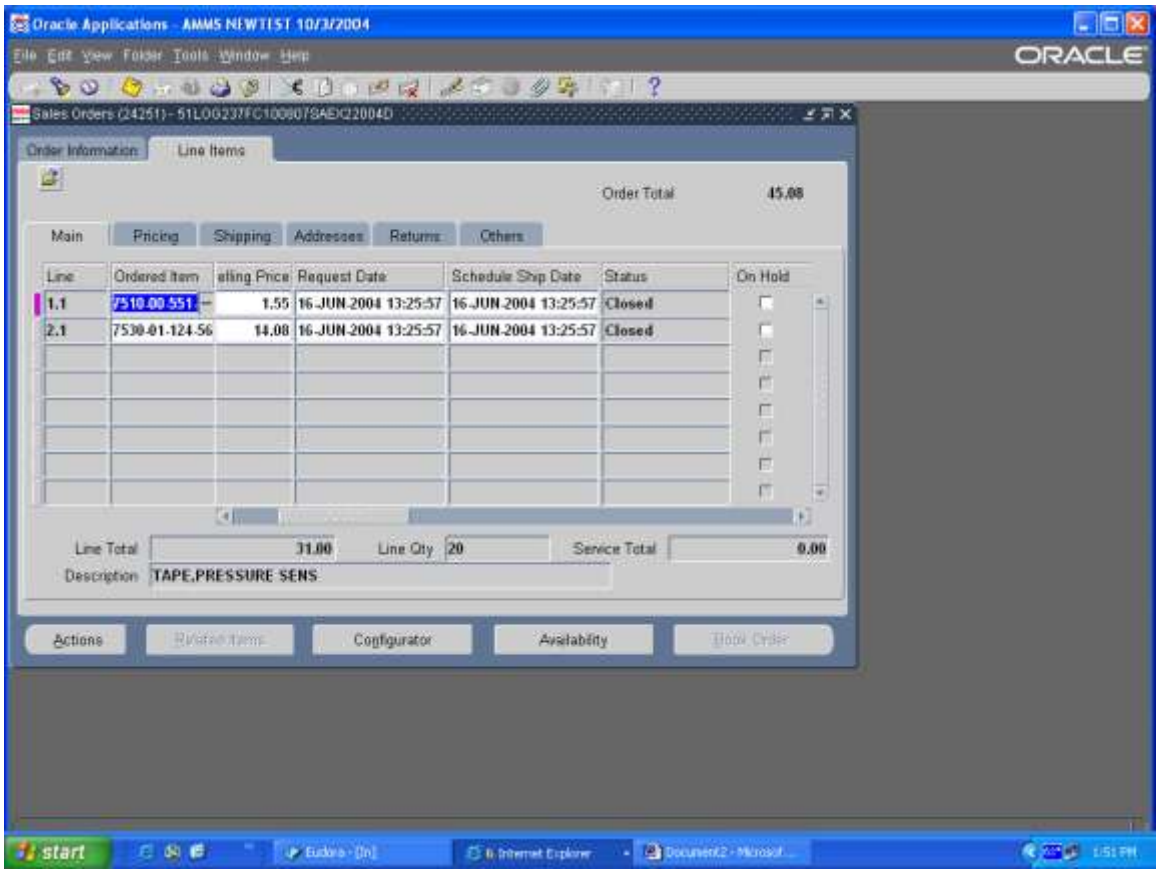
Expected Results: The Line Item tab will appear with an Availability Box



Step Description: Close the Availability Box

Step Description: Select the line on the sales order for which you are doing the RMA. Use the scroll bar at the bottom, slide to the right and verify that the line is Closed. **<u>Write down the Unit Selling Price and the Line Total on the sales order.</u>**

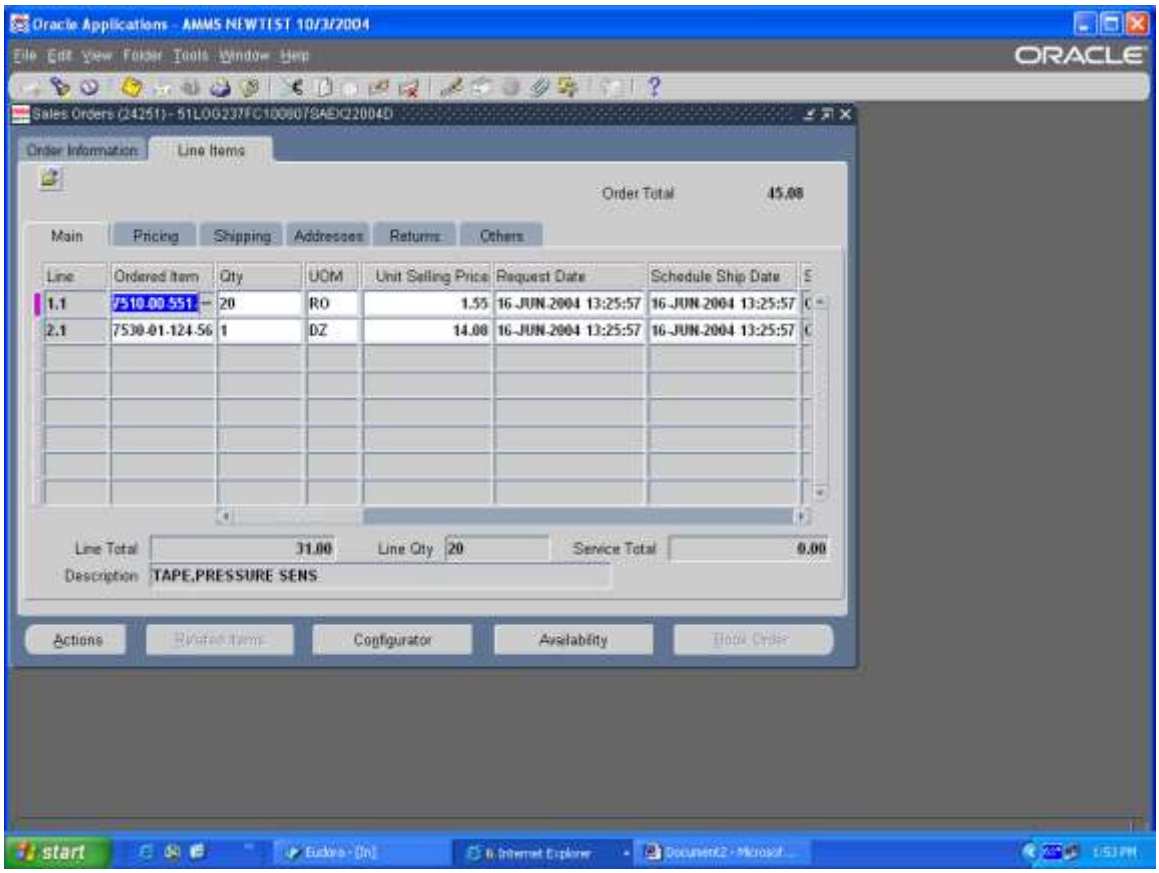
Expected Results: You will see a status of Closed in the status field



If the line for which you need to do that RMA is not closed, you must close the line before proceeding.

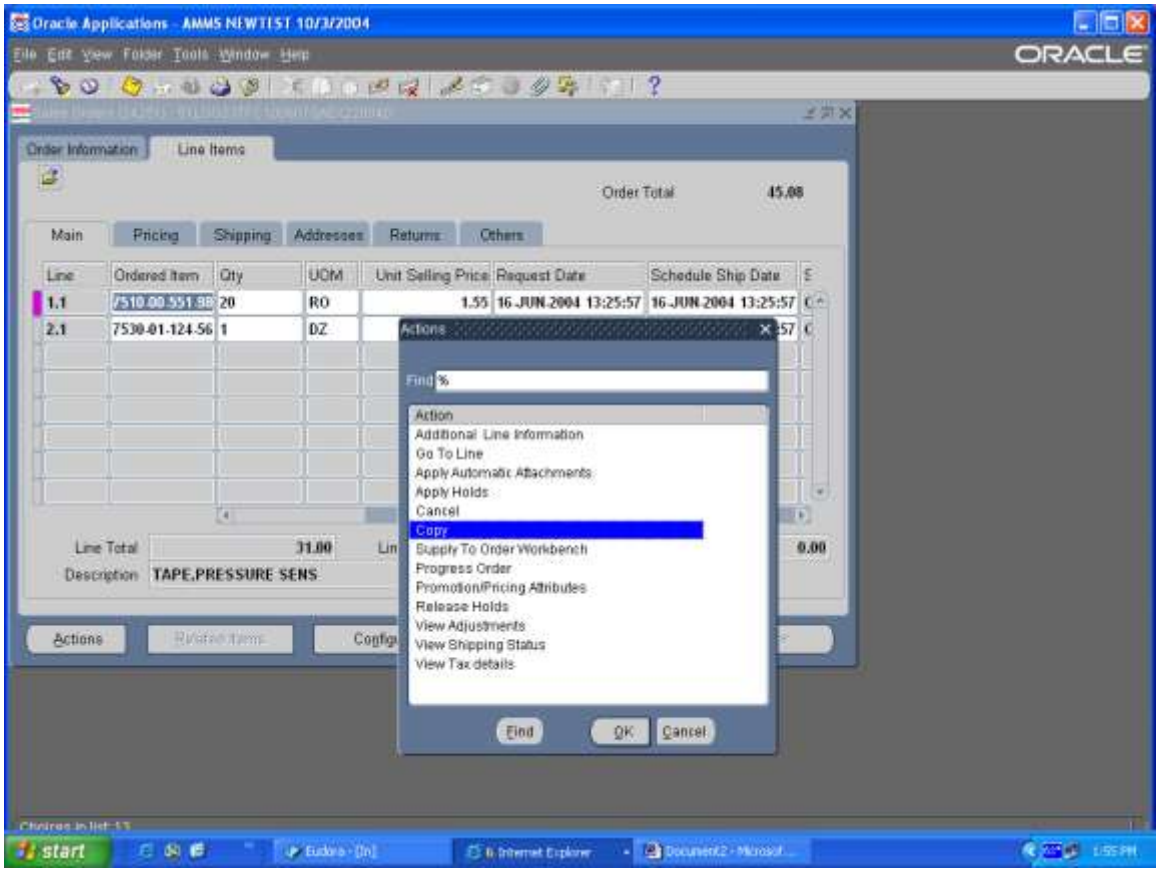
Step Description: At the bottom left of the screen select the Actions Button.

Expected Results/Actions: An Actions menu will appear



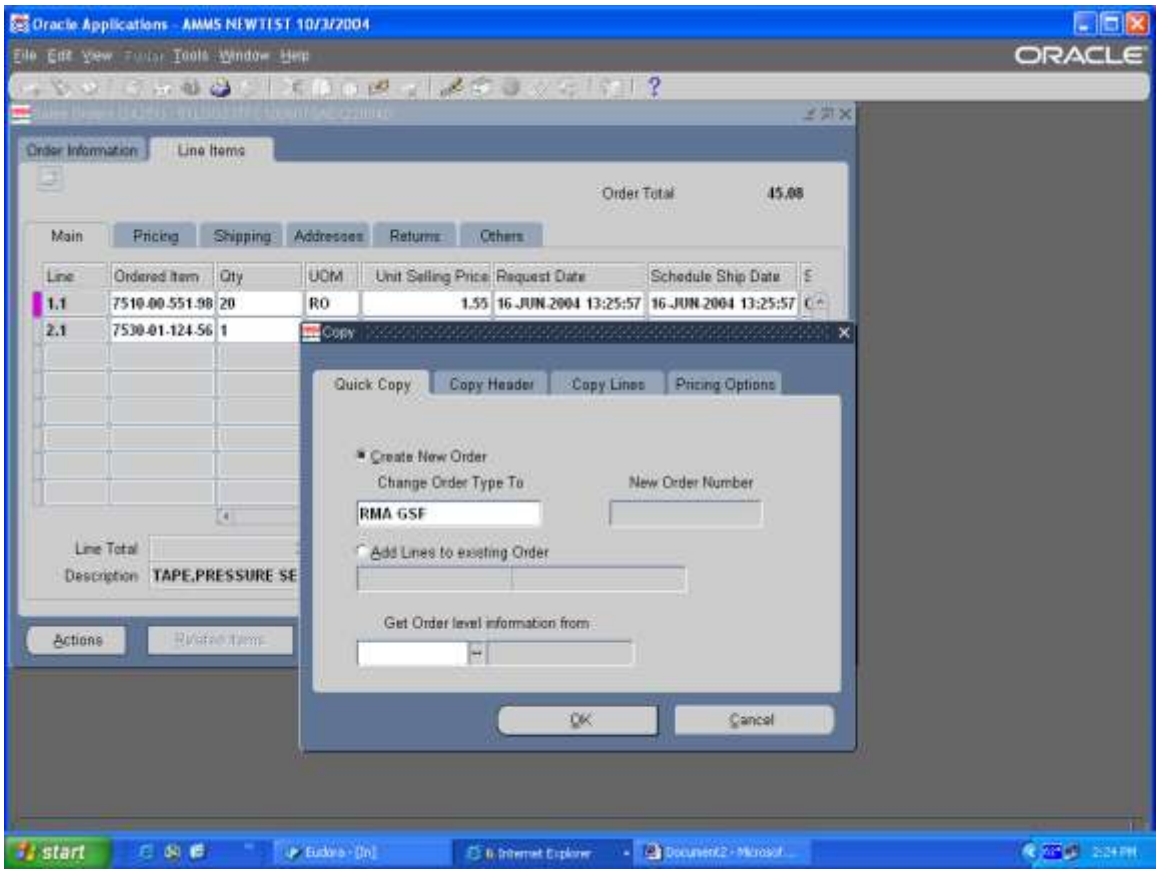
Step Description: From the Action menu select Copy and click OK

Expected Results/Actions: A Copy window will appear



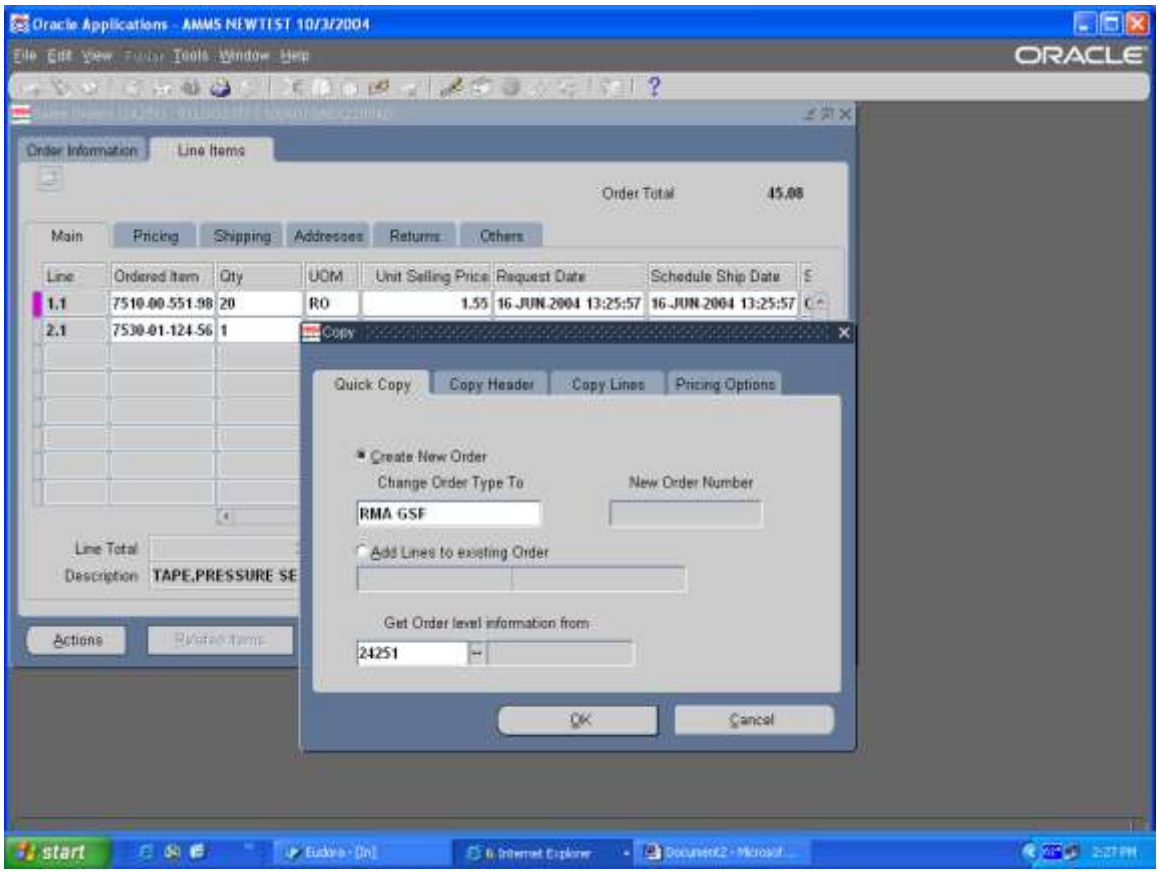
Step Description: In the Copy window, at the Quick Copy tab, select the Create New Order, then click in the “Change Order Type Field To” field and click on the LOV and select the appropriate RMA type. (RMA GSF or RMA WFF)

Expected Results/Actions: Field will populated with New Order type.



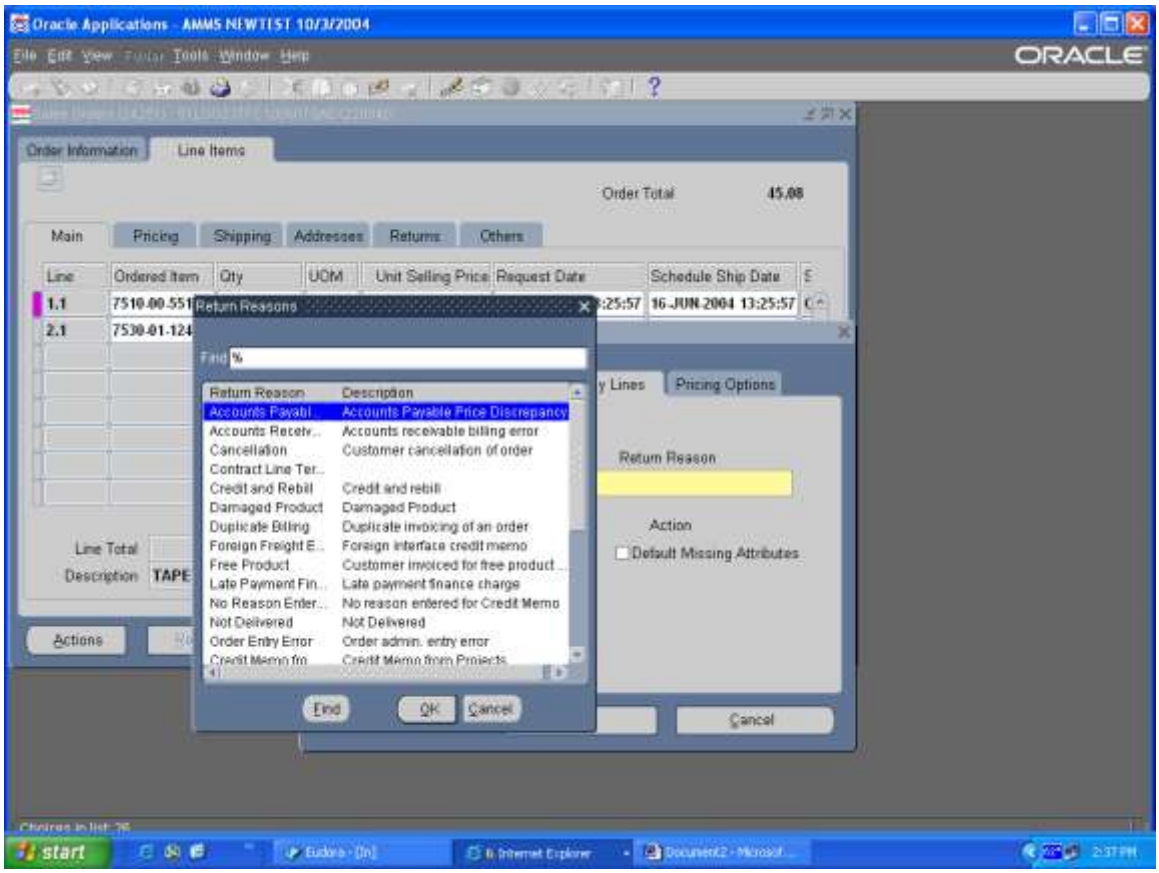
Step Description: At the bottom of the Copy window in the Get Order Level Information from field you **MUST** enter the original sales order number.

Expected Results/Action: Field will be populated



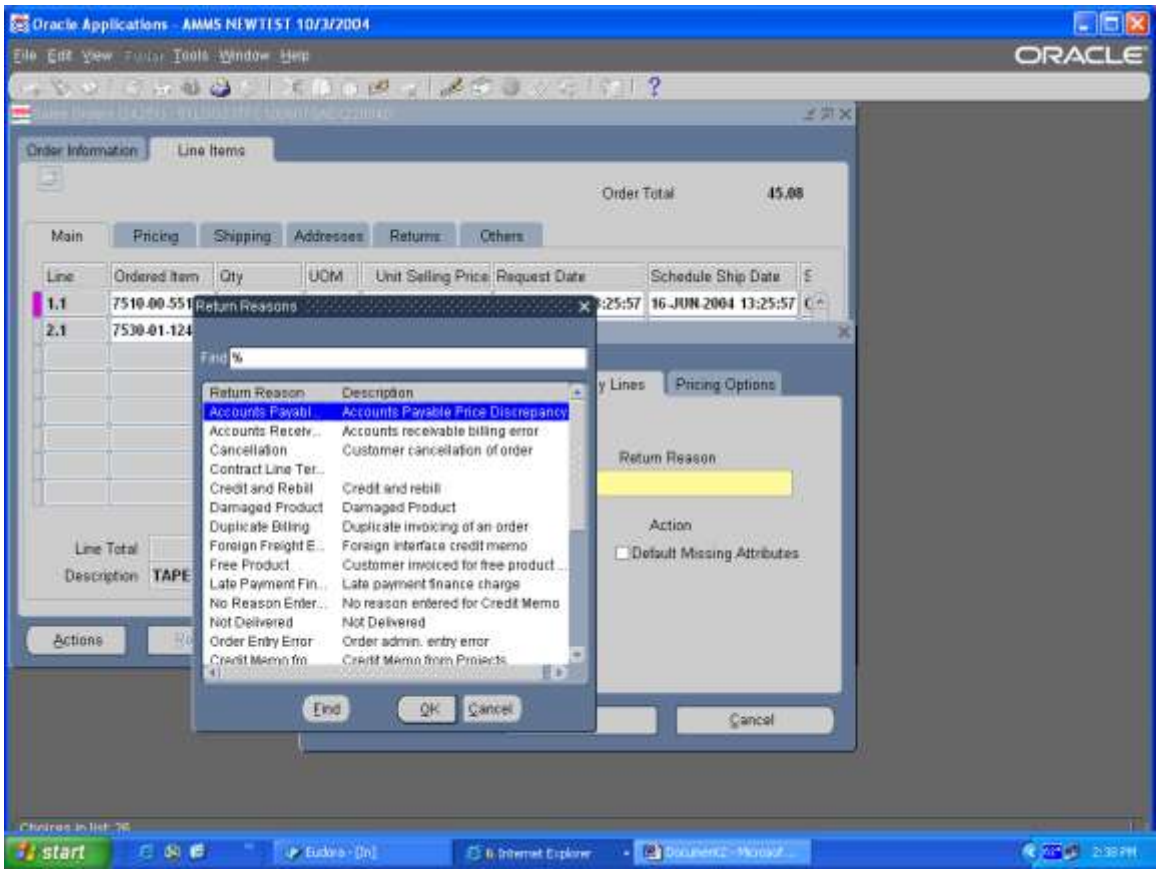
Step Description: Click on the Copy Lines tab on the Copy window, and enter a Return Reason click on the LOV for a list of the Reasons.

Expected Results: The Return Reasons window will appear.



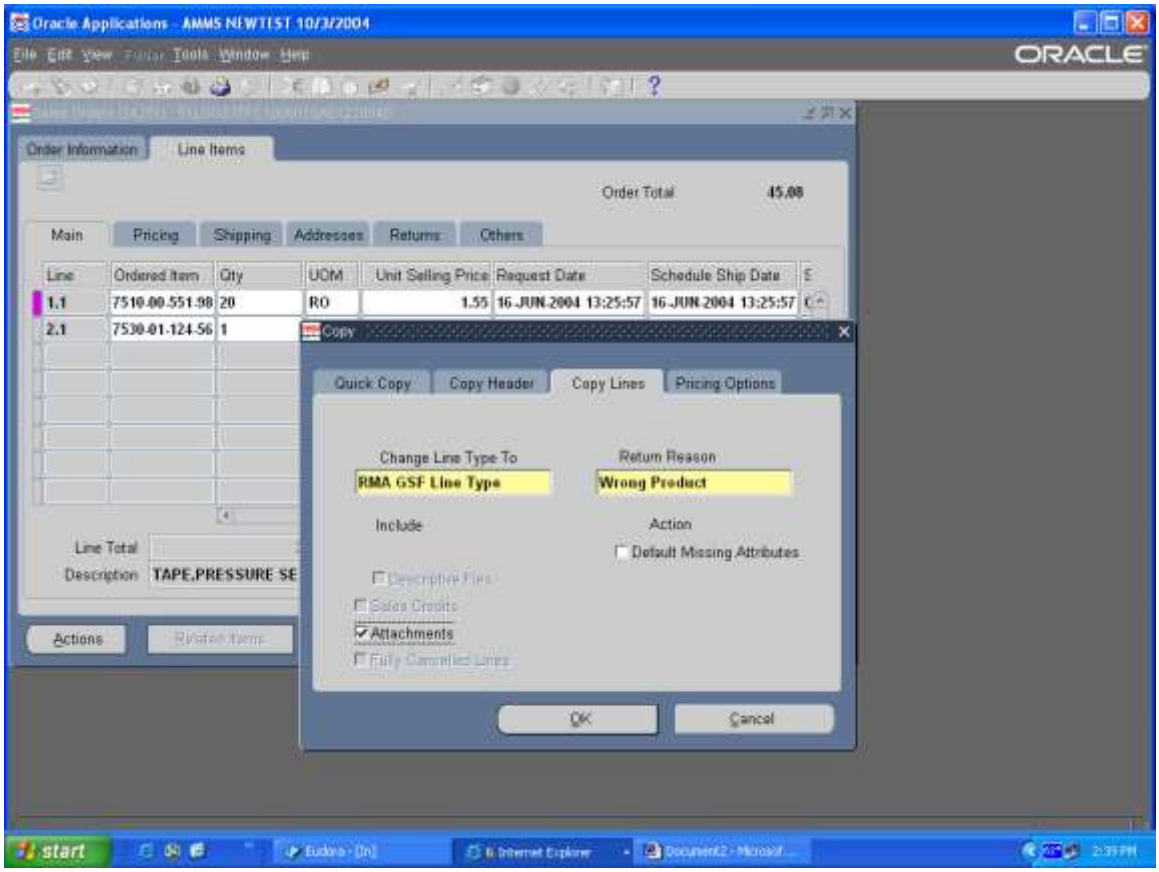
Step Description: Select the appropriate reason for the return and click OK to the Return Reason window

Expected Results: Window will disappear and field will be populated



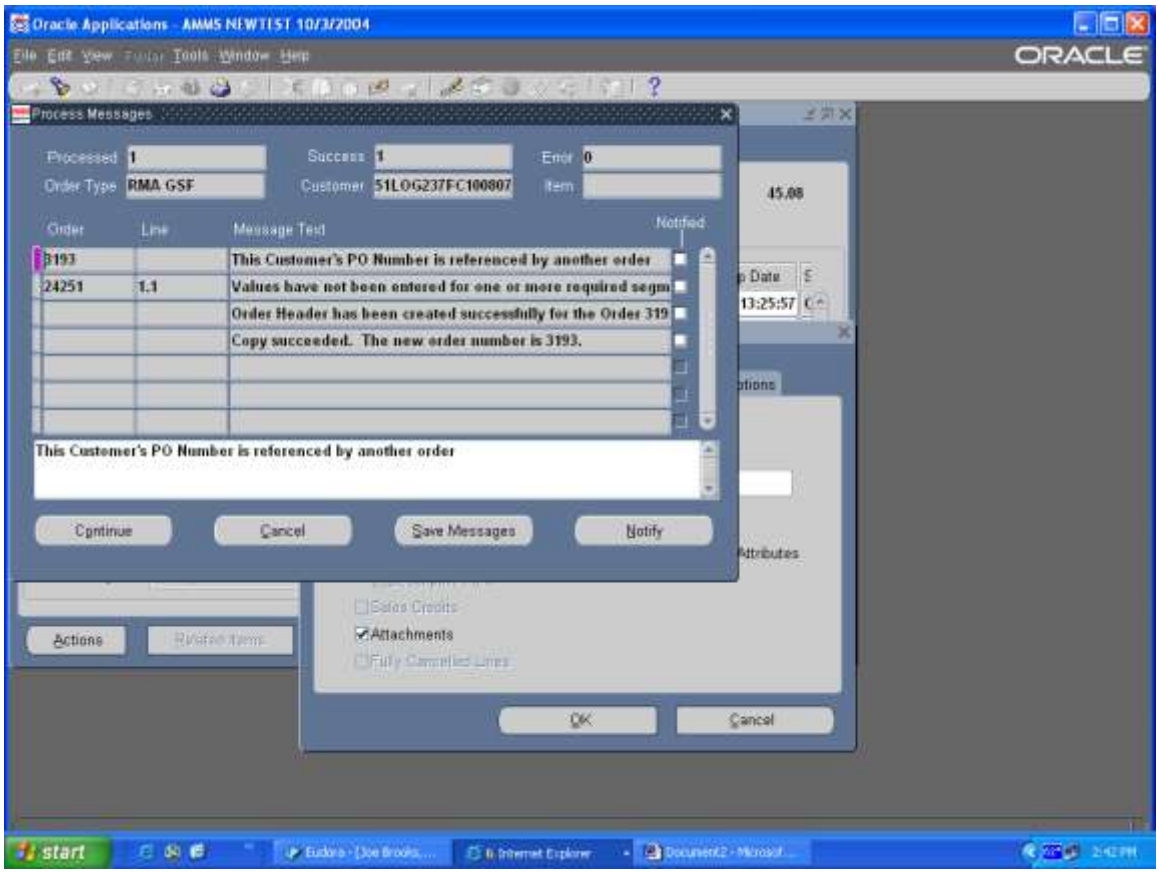
Step Description: Click OK on the Copy window

Expected Results: The Process Message window will appear



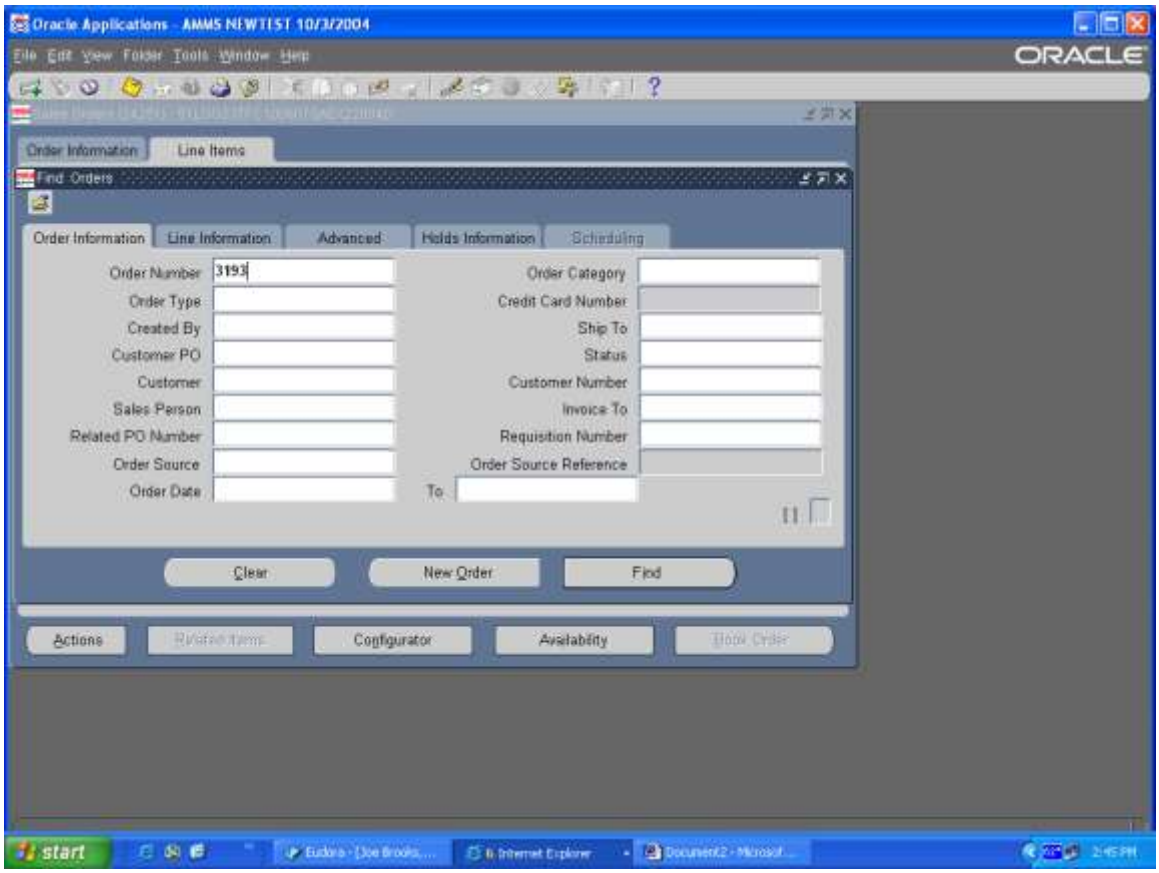
Step Description: The Process Message screen will tell you that your order was created and give you an RMA # write this # down for future reference. **<u>Click the Continue button on the Process Message window</u>**.

Expected Results: You will be back at the original sales order information on the Sales Order form.



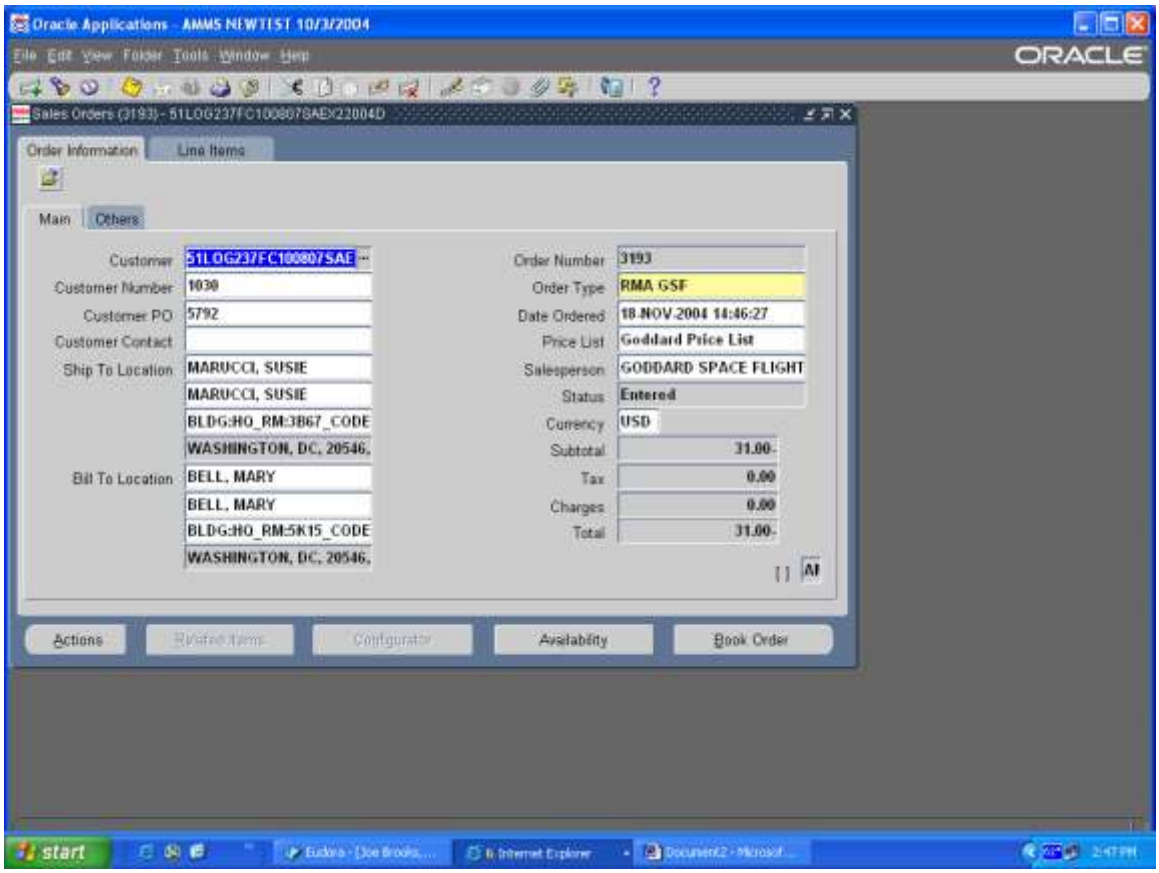
Step Description: Select the "flashlight" from the toolbar this will allow you to query up the RMA you just created. When the Find Orders screen appears, click on the Clear button, then enter the RMA # in the Order Number field and click on the Find button.

Expected Results: The Order Organizer window will appear with the RMA information



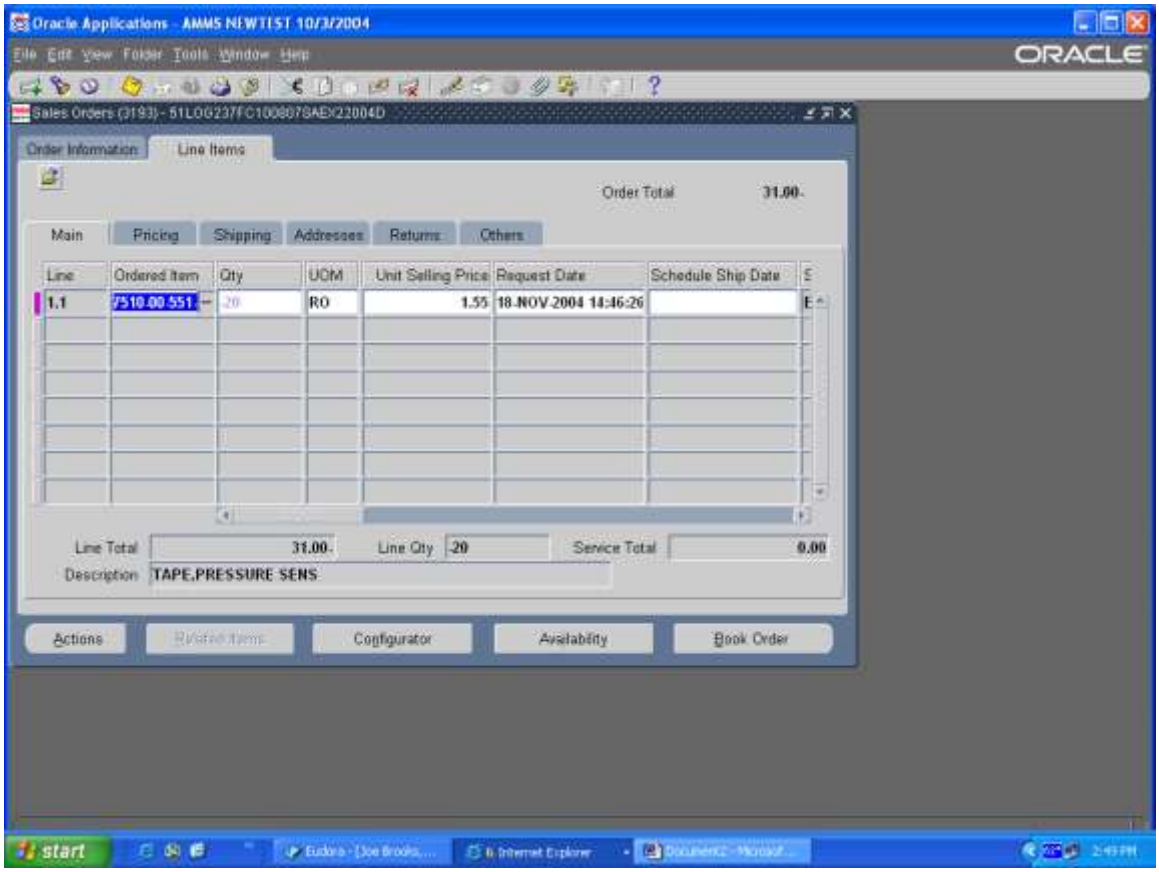
Step Description: Click on the Open button at the bottom right of the window

Expected Results: Sales Order window opens.



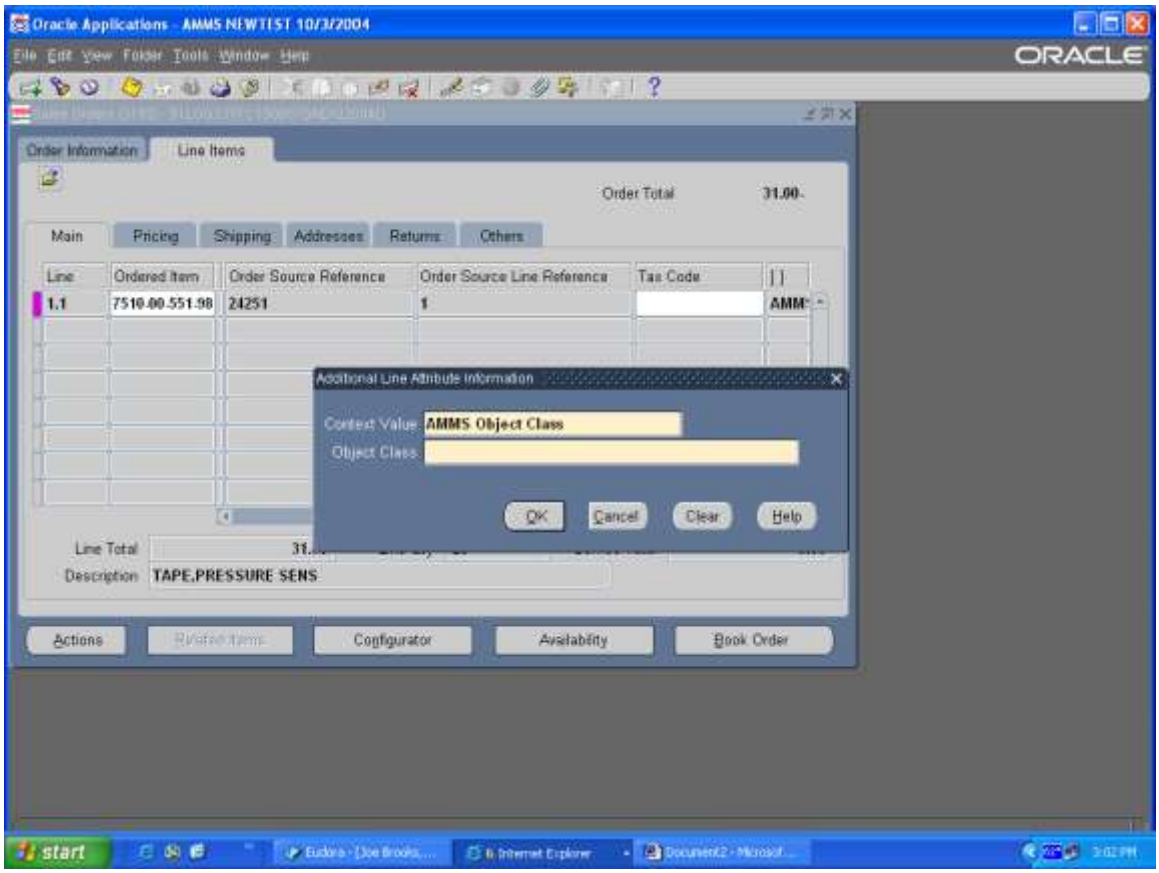
Step Description: Click on the Line Items tab

Expected Results/Actions: The line information for the RMA will appear



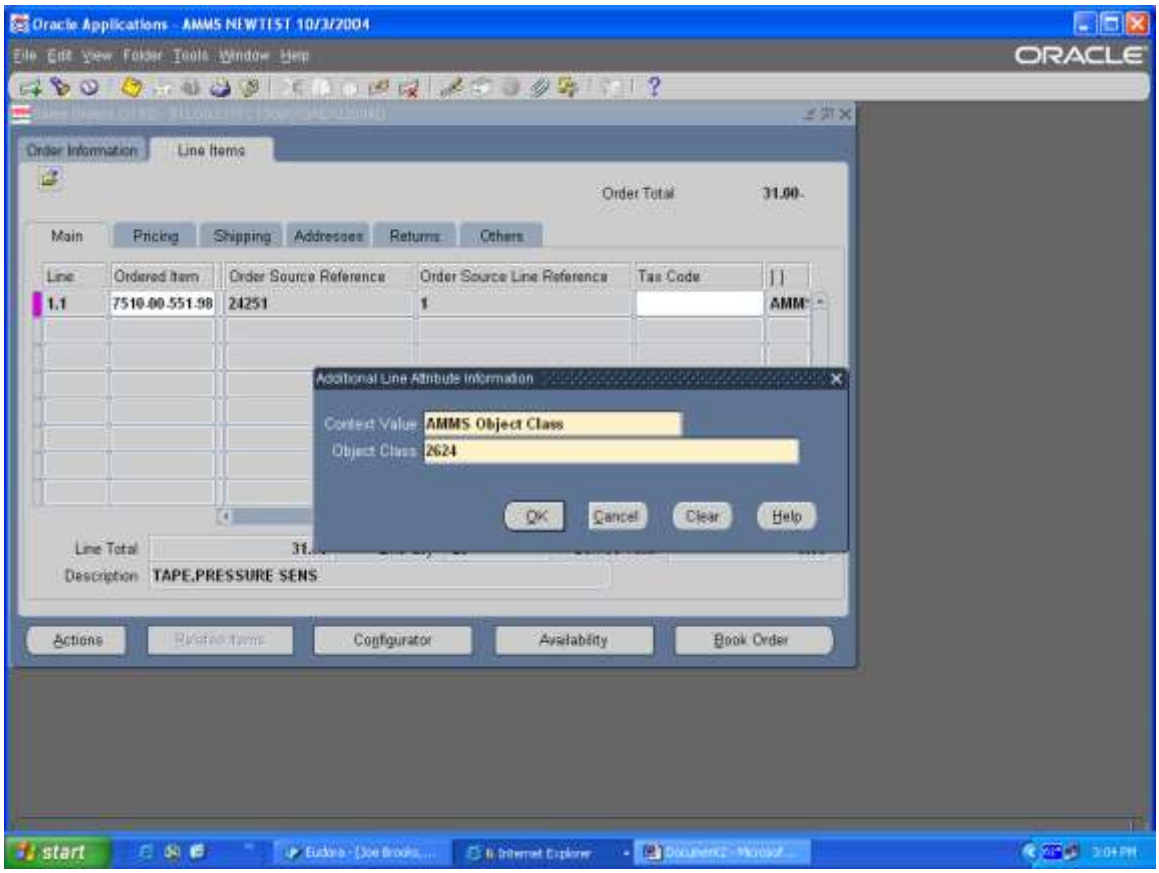
Step Description: At the Line Item Main tab scroll all the way to the right until you see [] take your curser and click in that field.

Expected Results: Additional Line Attribute Information window will open



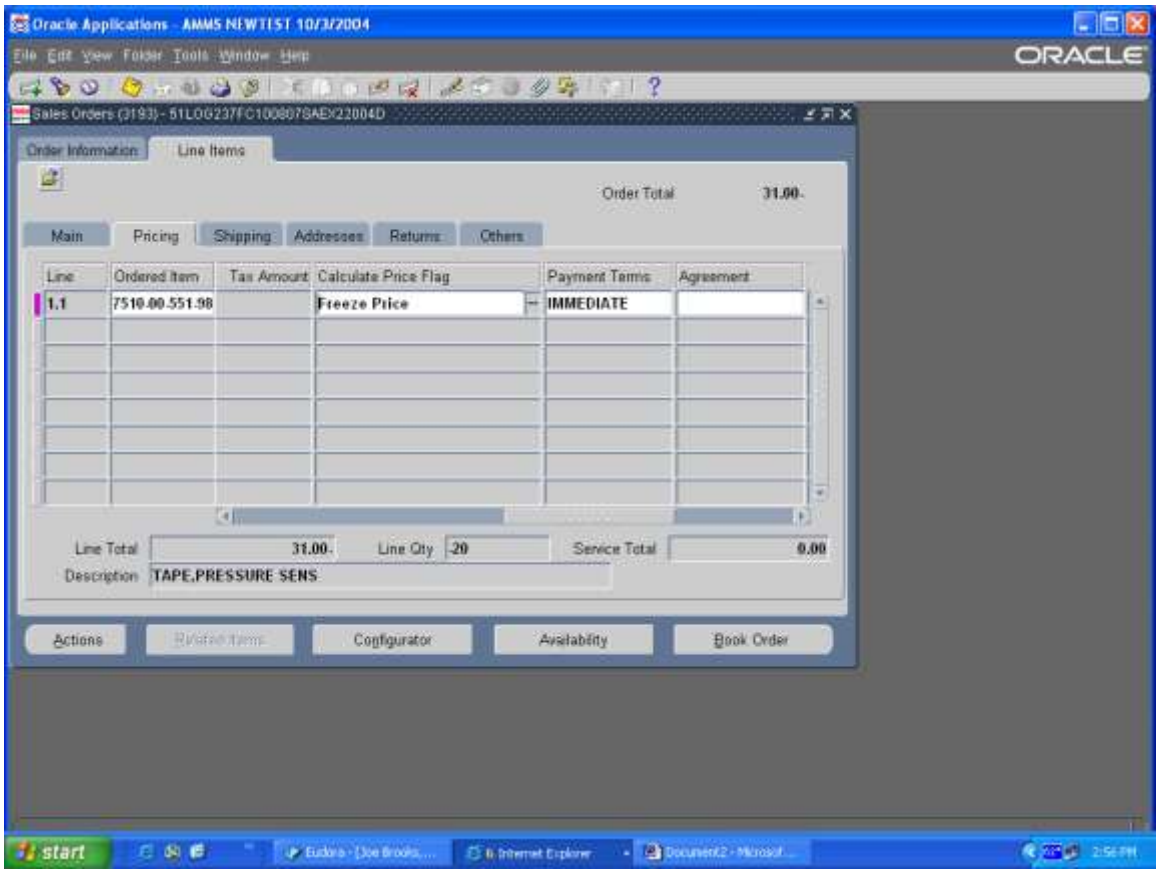
Step Description: Enter the CORRECT Object Class for the item. This is determined by the first 2 digits of the item number. A list of the Object Classes was provided. Enter the 4 digit number in the Object Class field. Click OK to the Additional Line Attribute Information window.

Expected Results/Actions: Field will be populated and window will close



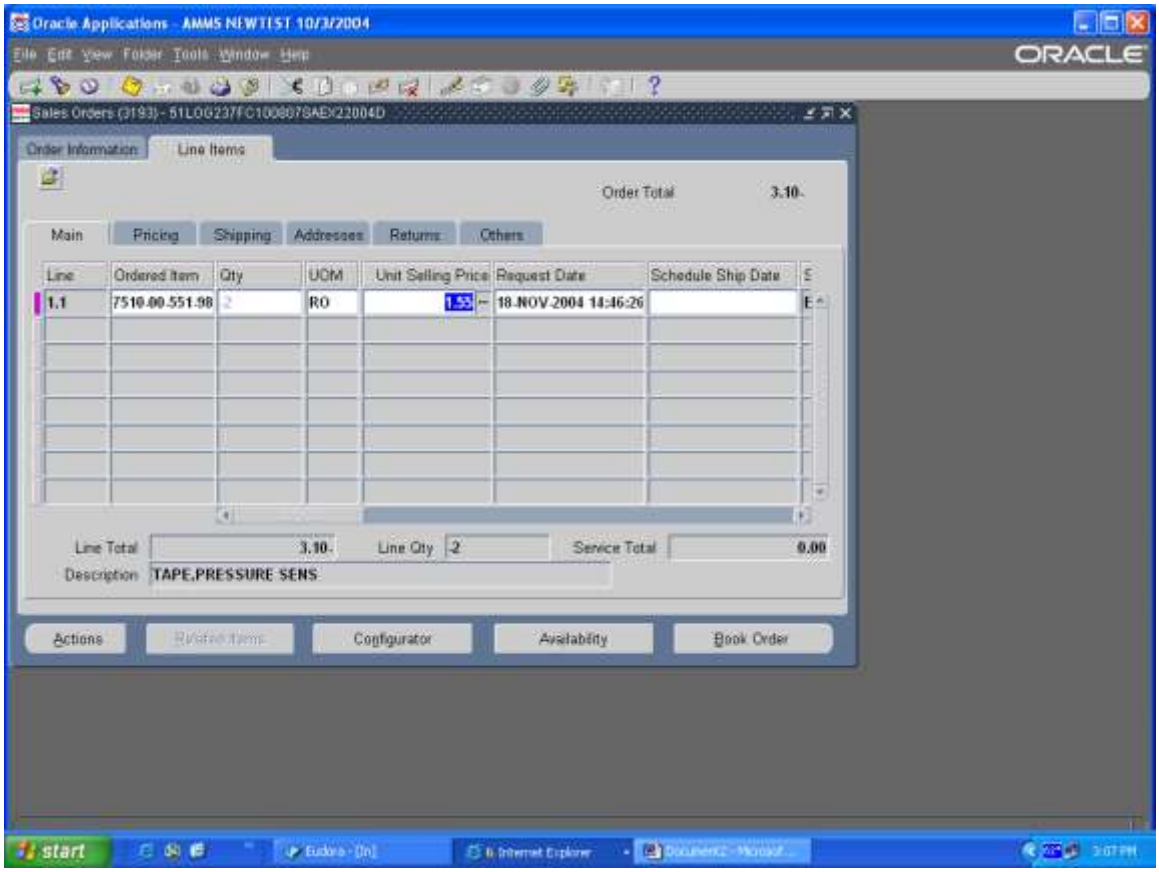
Step Description: Go to the Pricing Tab scroll over to Calculate Price Flag field and change it to Freeze Price. **Save your work**. Then verify the information, the item number, qty and unit selling price is the same as was on the original sales order. If the unit selling price is different than the original sales order change to correct cost, and verify the Line Total is the same as on the original sales order line. Save your work.

Expected Results: Field will be populated and unit selling price will be frozen



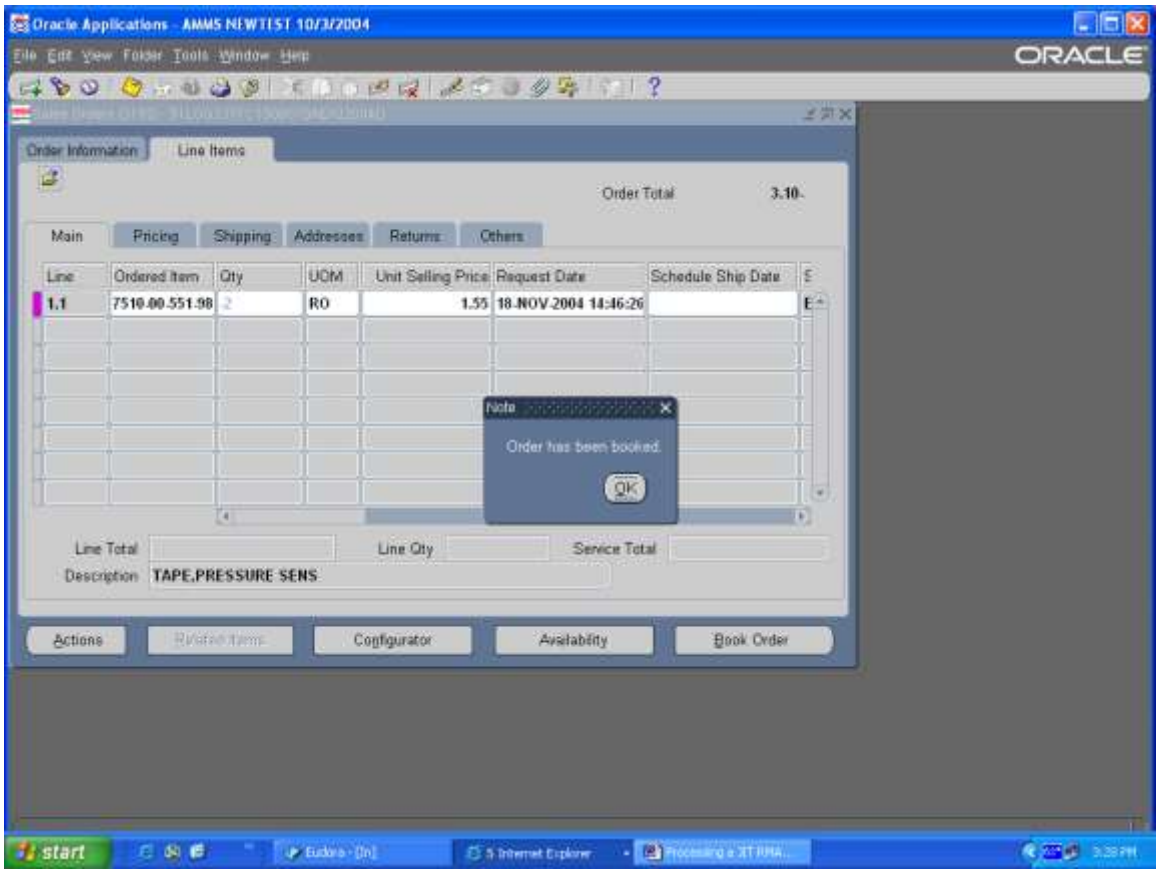
Step Description: If the qty that you are doing the RMA is different then the qty that is displayed, click in the qty field the qty and enter the qty that is being returned. Verify that the cost matches the cost from the original order

Expected Results: The qty will change



Step Description: Click on the Book Order button at the bottom right of the window.

Expected Results: You will get a Note that the order has been booked.

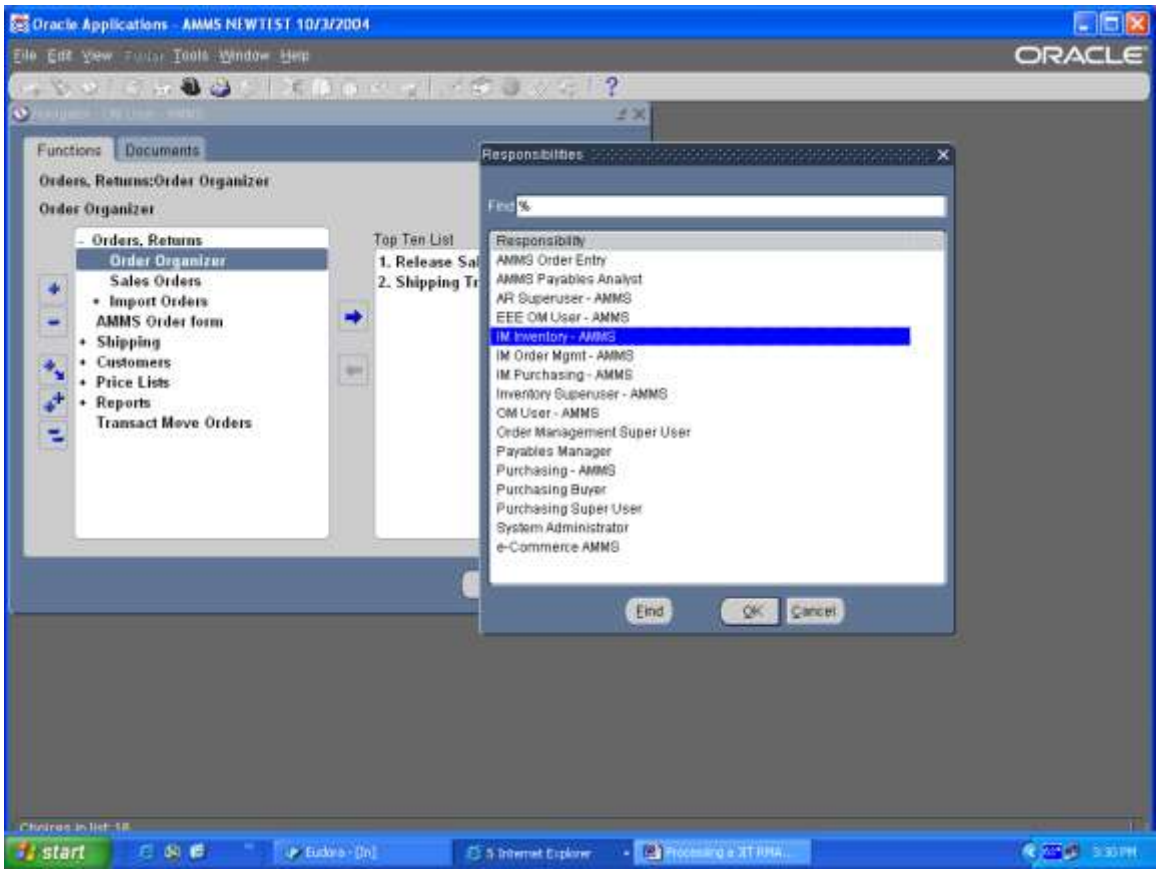


Step Description: Click OK to the Note, and close all forms

Expected Results: Note will disappear and you will return to the OM User Main Menu.

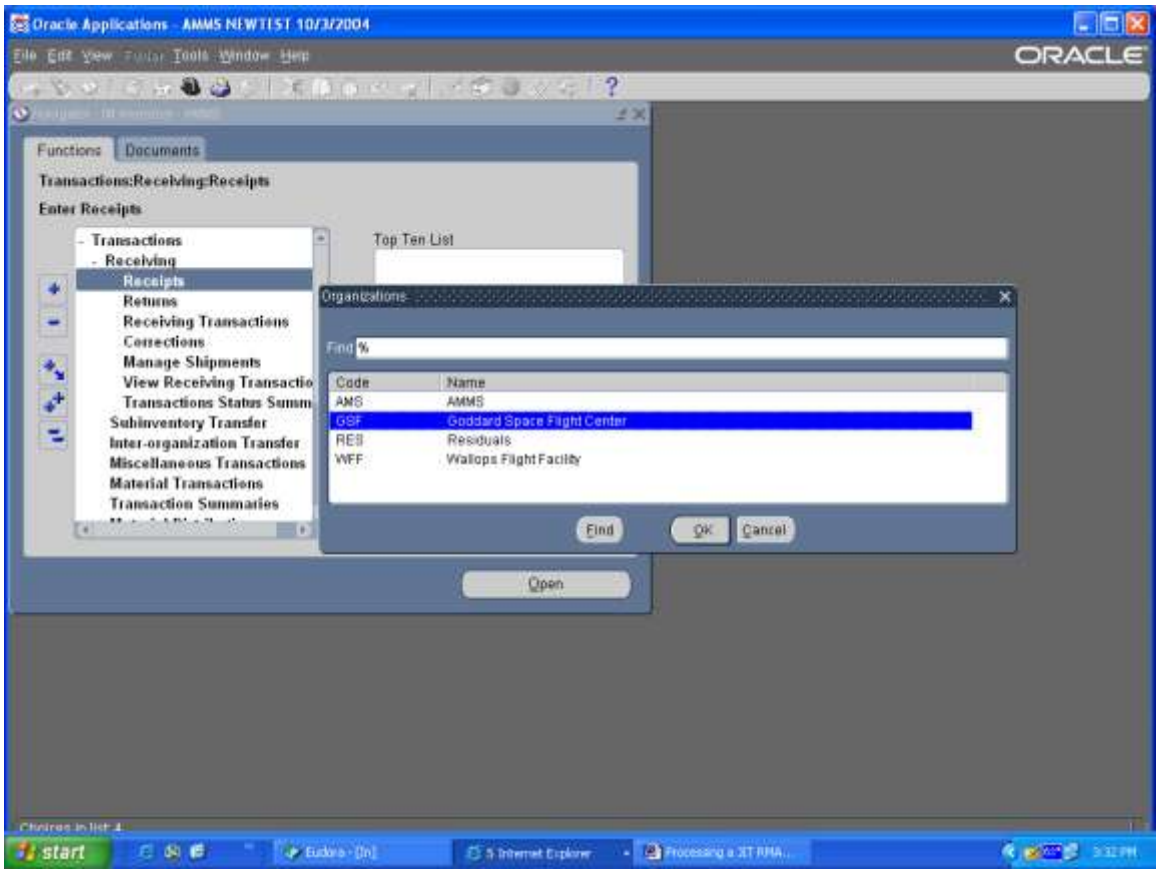
Step Description: Change responsibilities to the IM Inventory AMMS responsibility.

Expected Results: The IM Inventory AMMS main menu will appear



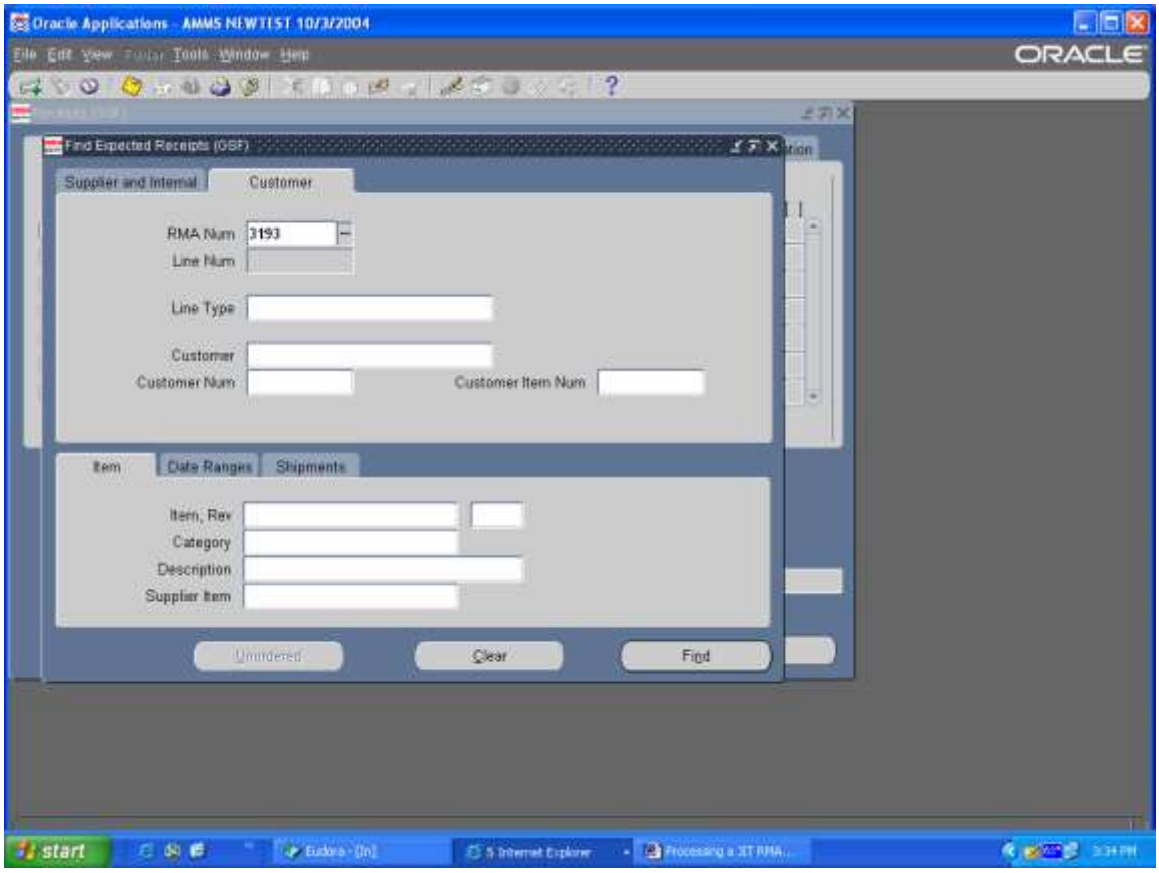
Step Description: From the IM Inventory AMMS main menu select Transactions > Receiving > Receipts and select the appropriate organization.

Expected Results: The Find Expected Receipts window will open



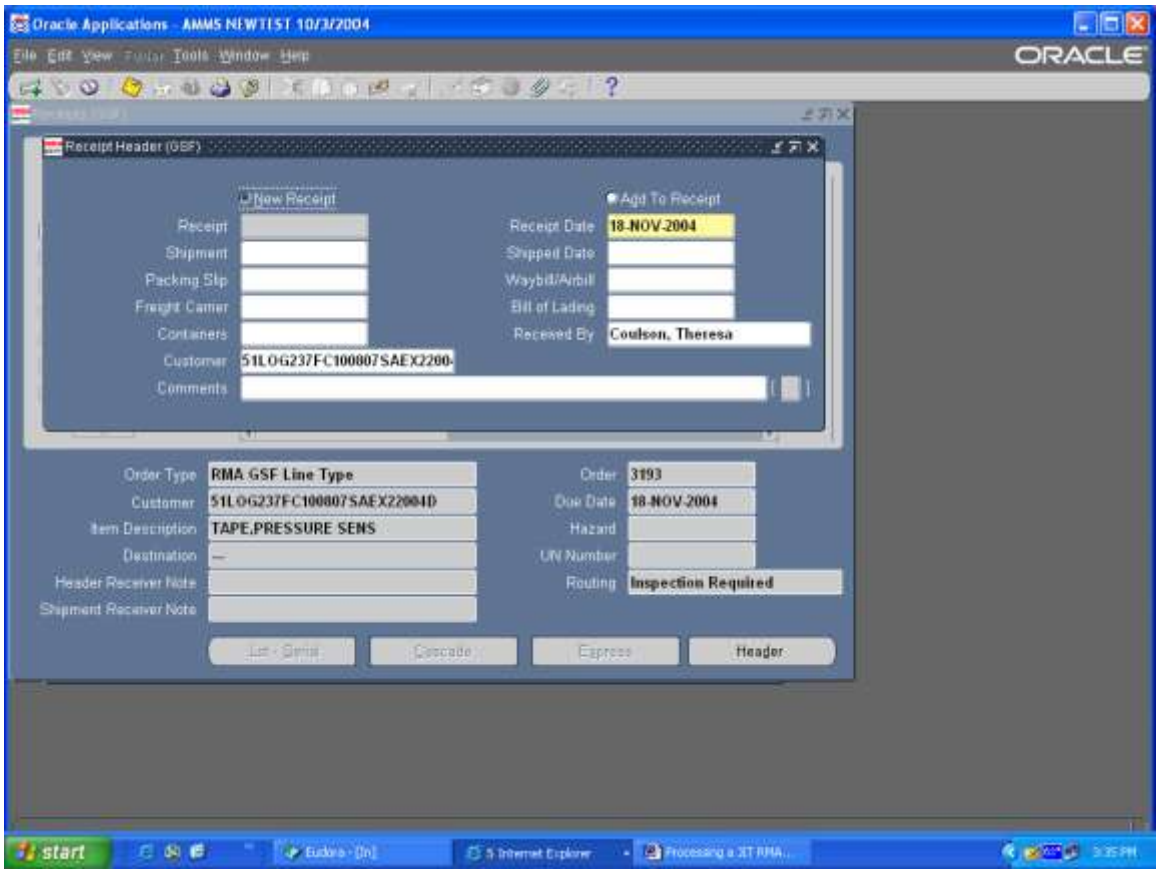
Step Description: Click on the Customer Tab on the Find Expected Receipts window and enter the RMA # you just processed and click on the Find button

Expected Results: The Receipt Header and Receipt window will open



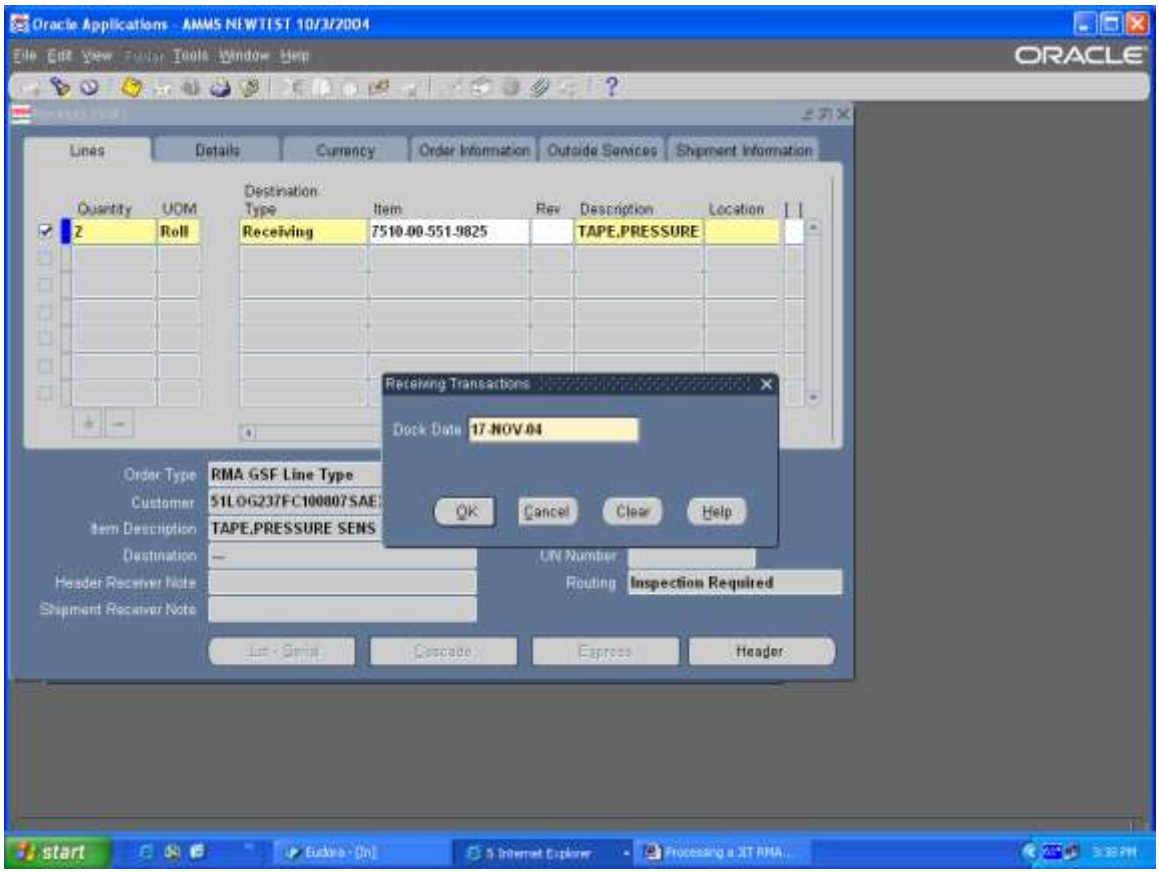
Step Description: Close the Receipt Header form.

Expected Results: The Receipt Header form will close and the Receipt window will appear



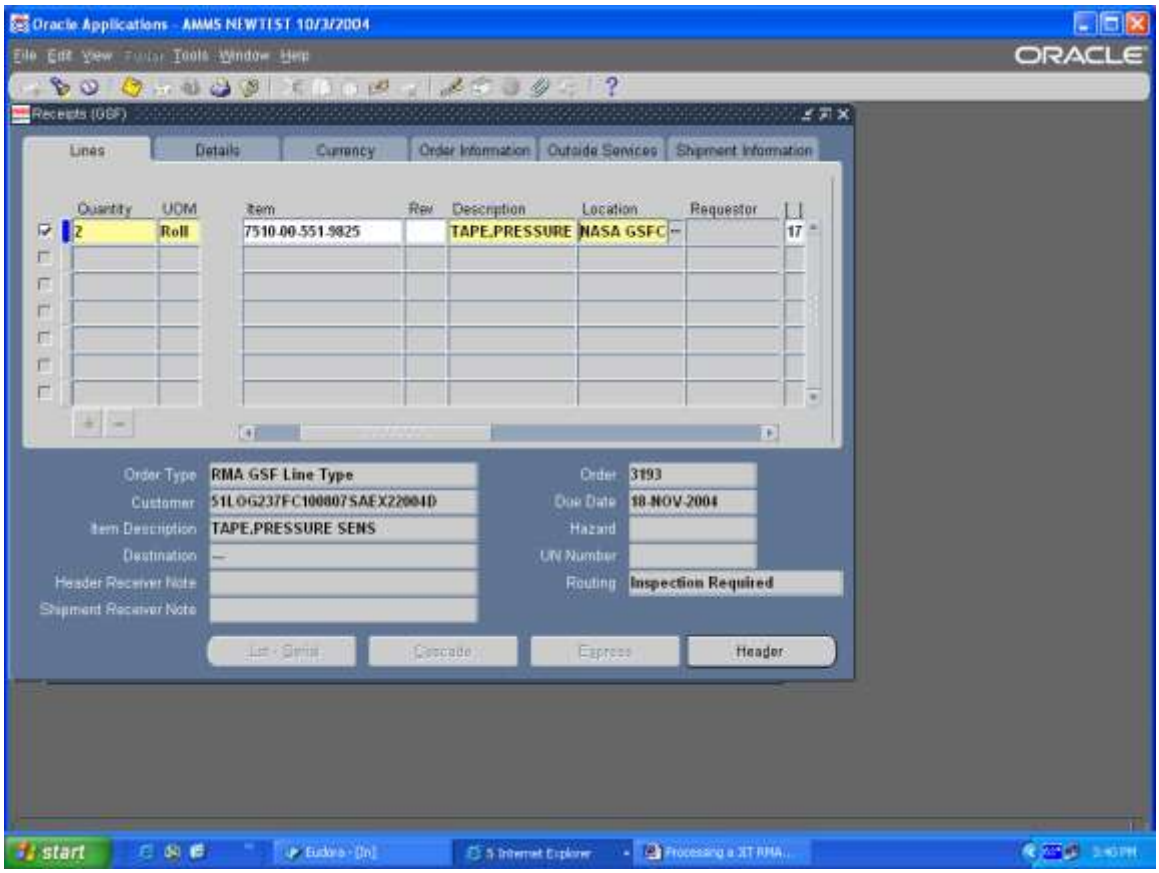
Step Description: Select the line, place a “check mark” in the box, then go to the [] field and click in that field with your cursor. The Receiving Transactions window will open, and you need to enter a Dock Date and click OK.

Expected Results: The field will be populated



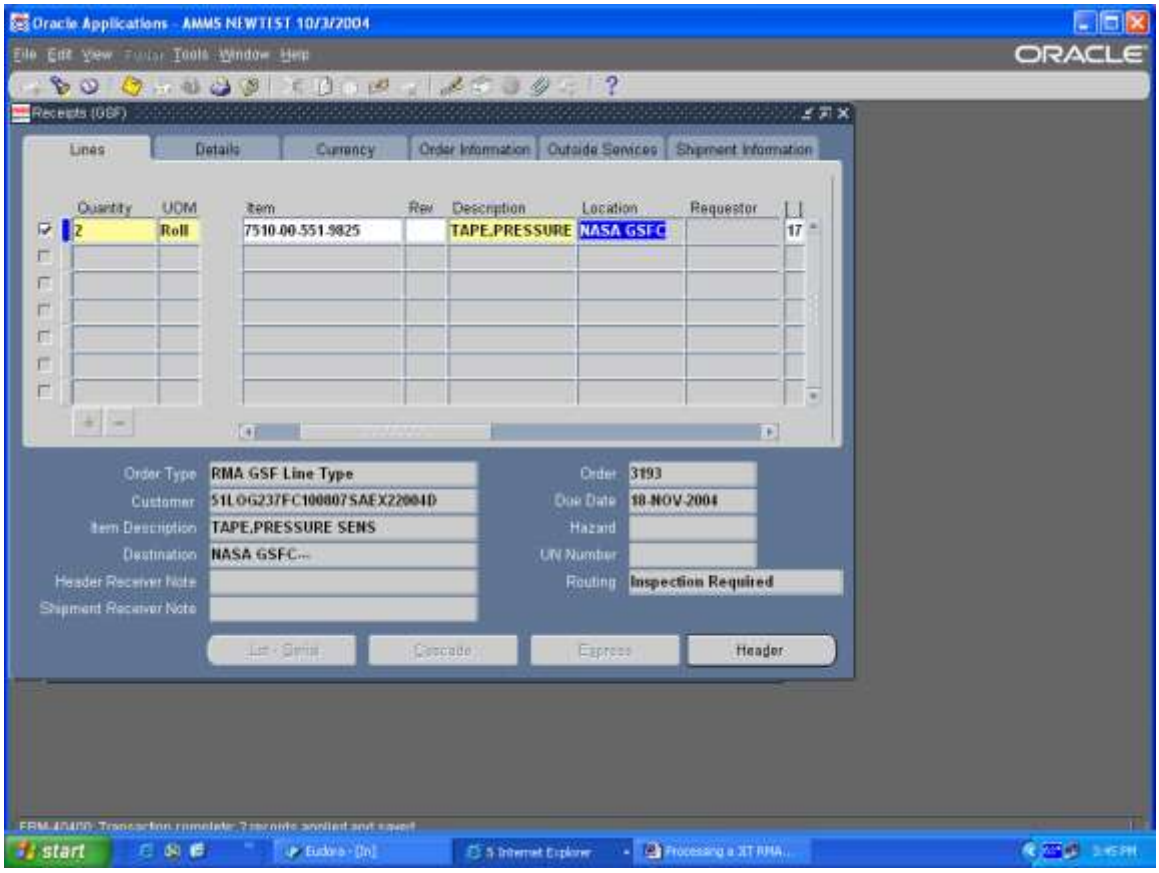
Step Description: Go to the Location field and click on the LOV and select NASA GSFC (NASA WFF for Wallops) from the menu.

Expected Results: Field will be populated



Step Description: Select the yellow diskette from the tool bar and Save your work.

Expected Results: You will get a message that says Transactions completed, 2 transactions saved and applied.

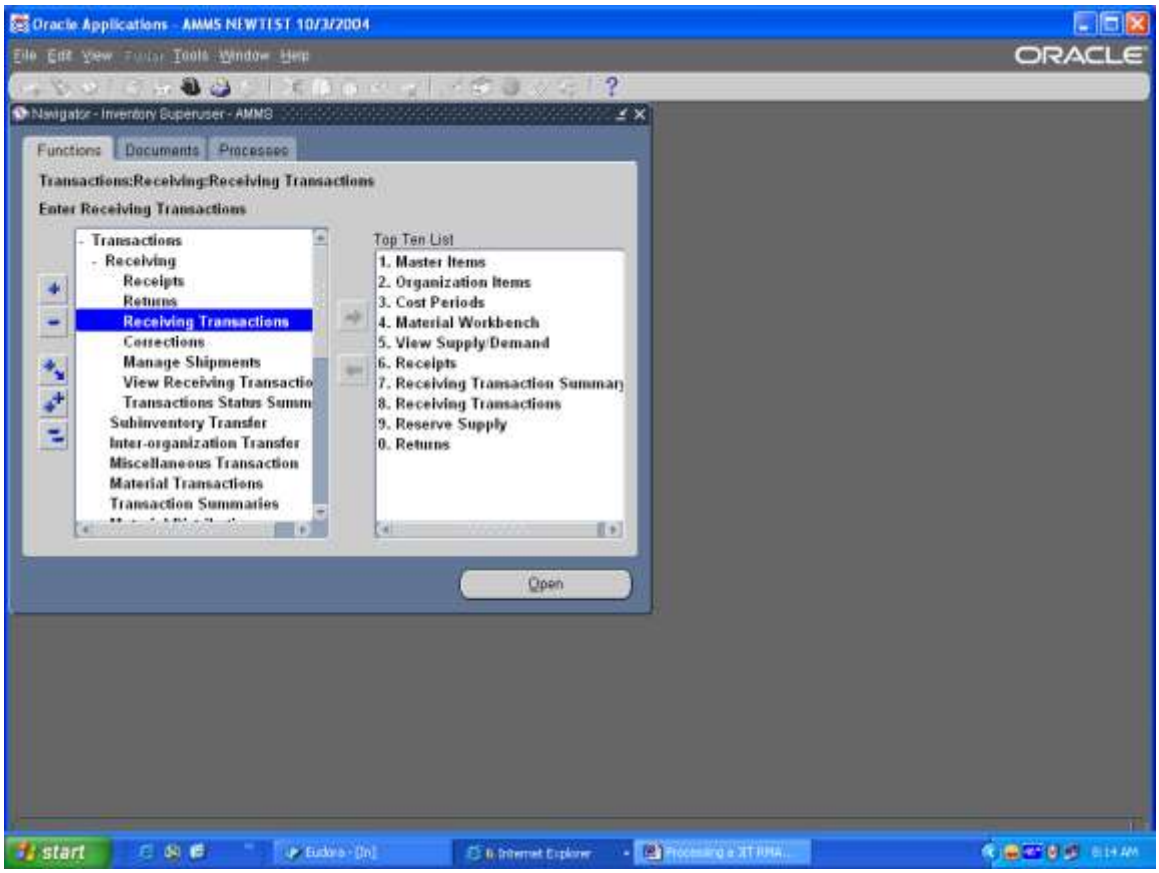


Step Description: Close all forms

Expected Results/Actions: Return to the IM Inventory Main Menu

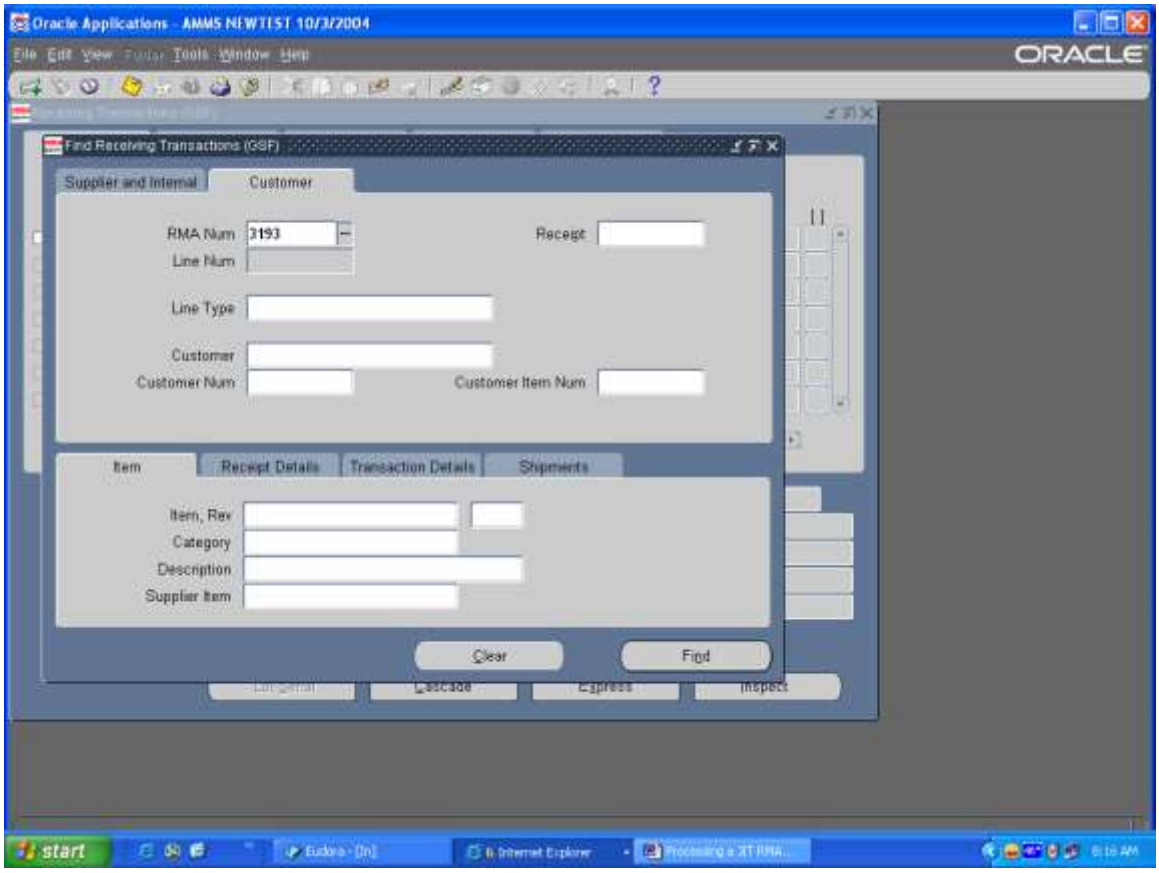
Step Description: Still in the IM Inventory Main Menu select Transactions > Receipts> Receiving Transactions

Expected Results: The Find Receiving Transactions window will open



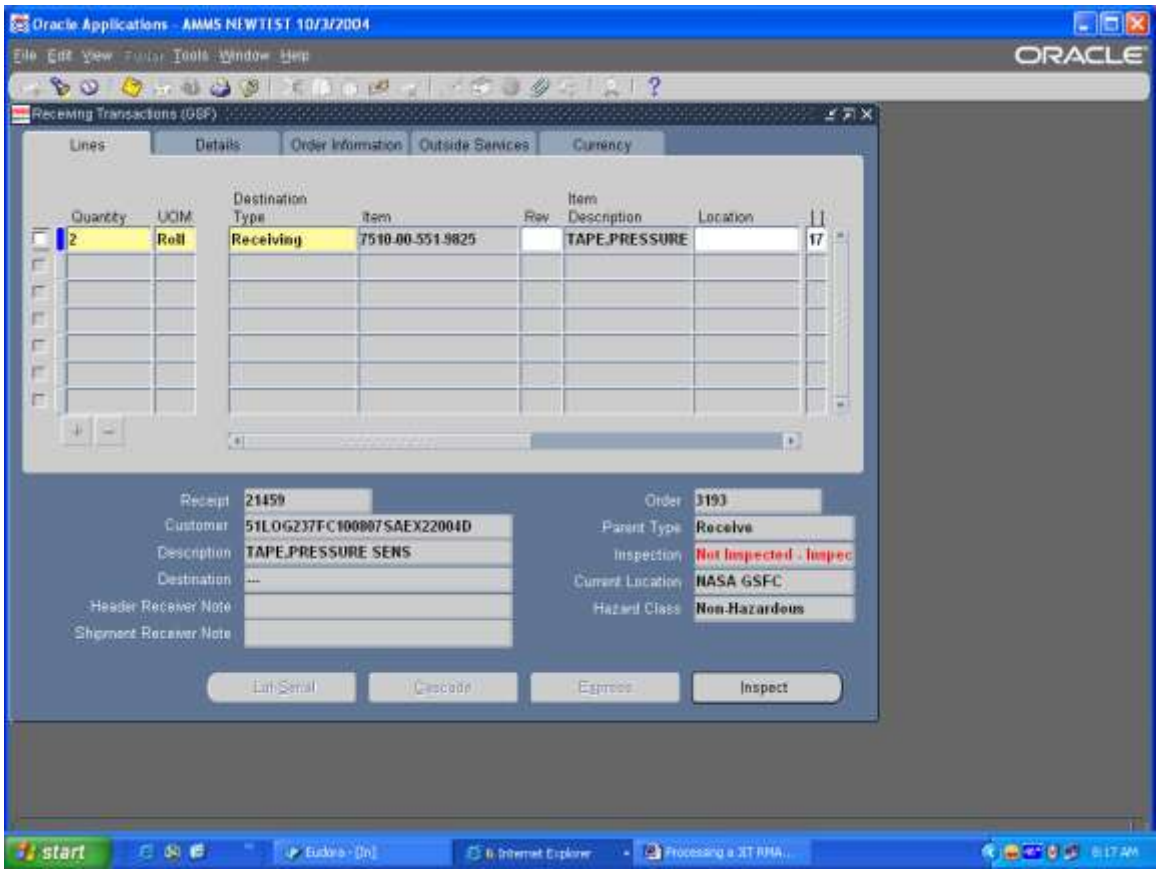
Step Description: At the Find Receiving Transactions window click on the Customer tab and enter the RMA # in the RMA Num field. Click on the Find Button

Expected Results: Receiving Transactions Screen opens



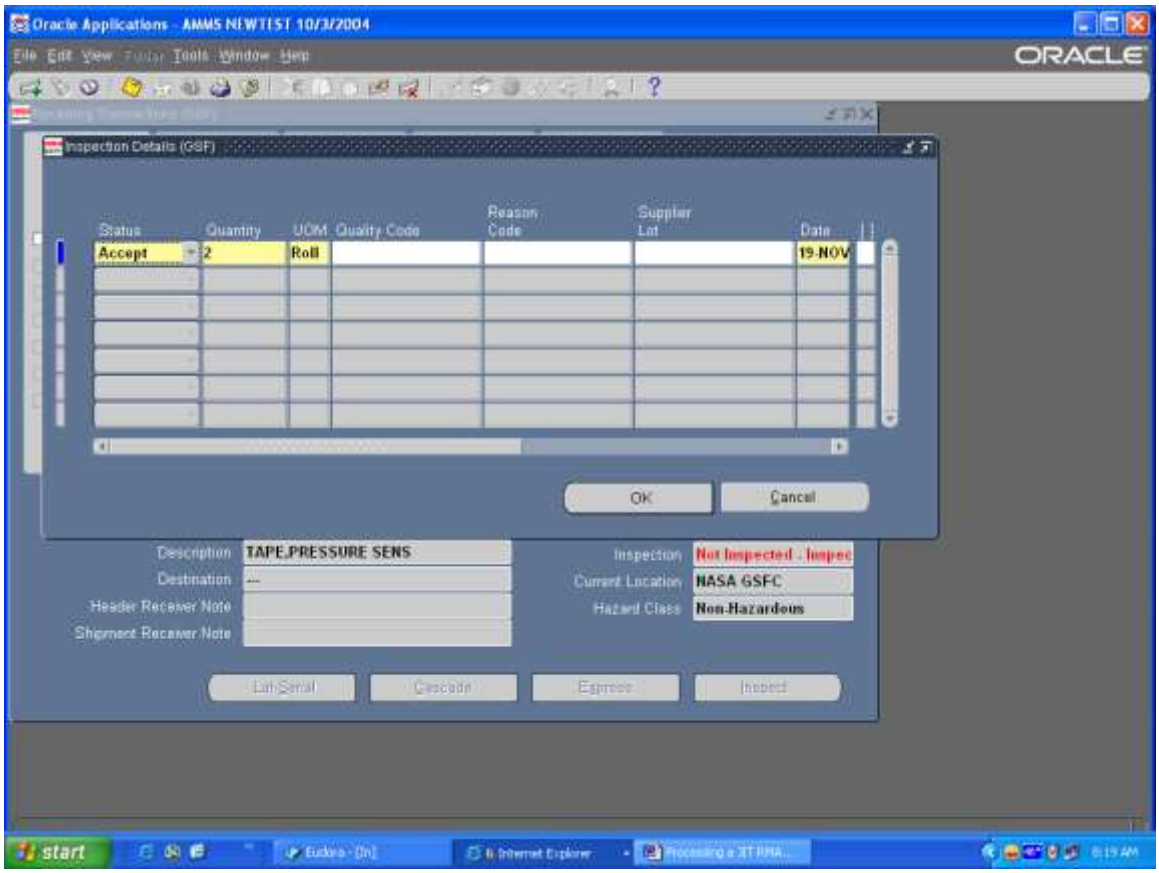
Step Description: Click on the Inspect button at the bottom right of the window.

Expected Results: The Inspection Details window will open



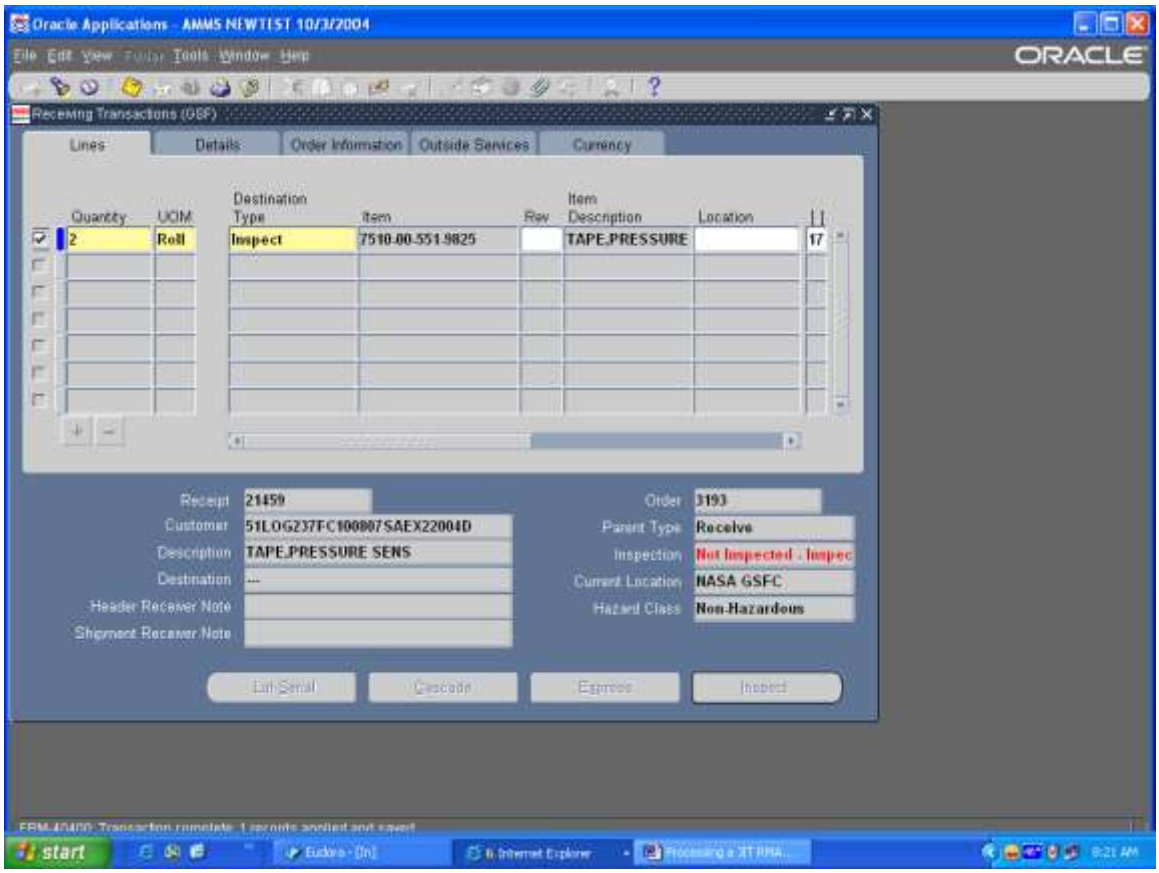
Step Description: At the Inspection Details window make sure that the status is Accept, click on the OK button.

Expected Results: You will return to the Receiving Transactions window



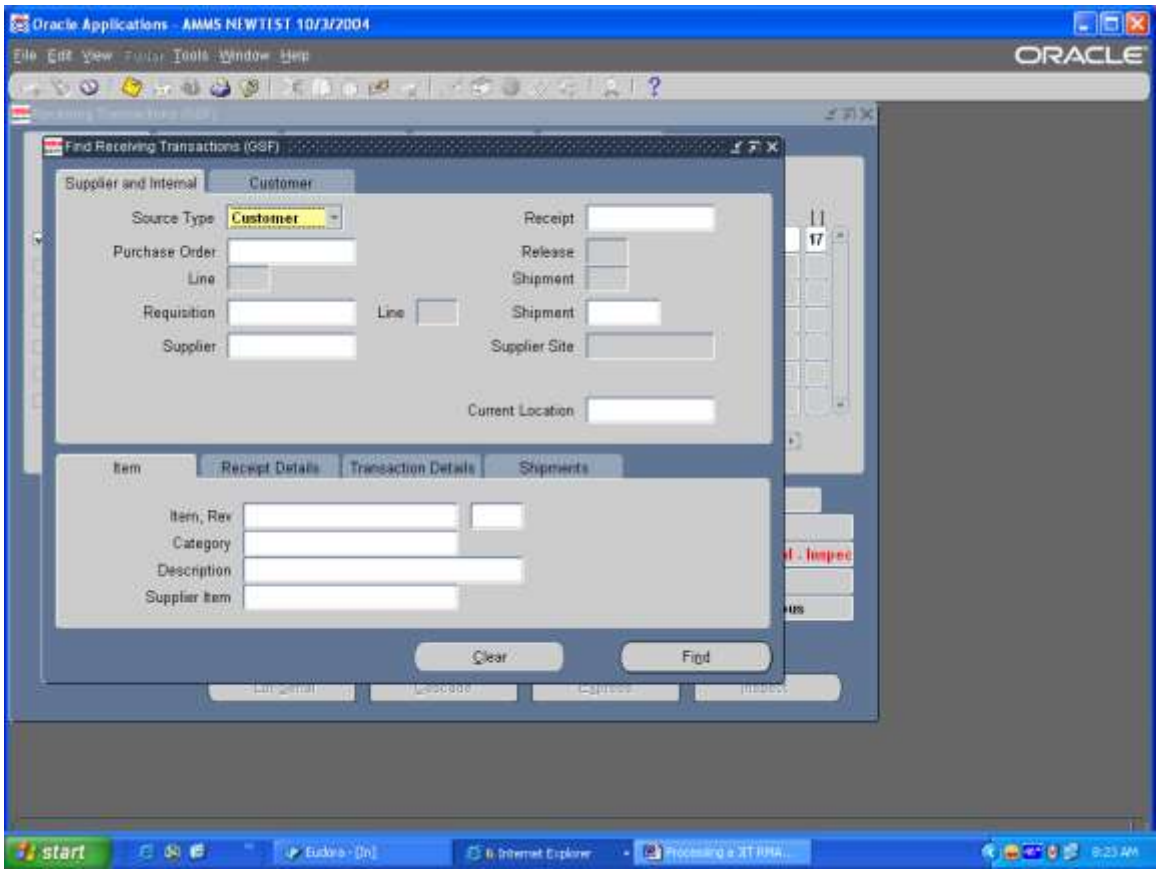
Step Description: You will see that the Destination Type has changed from Receiving to Inspect. Select the Save icon from the toolbar and save your work.

Expected Results: You will get a message at the bottom of the screen, Transaction Complete 1 record applied and saved



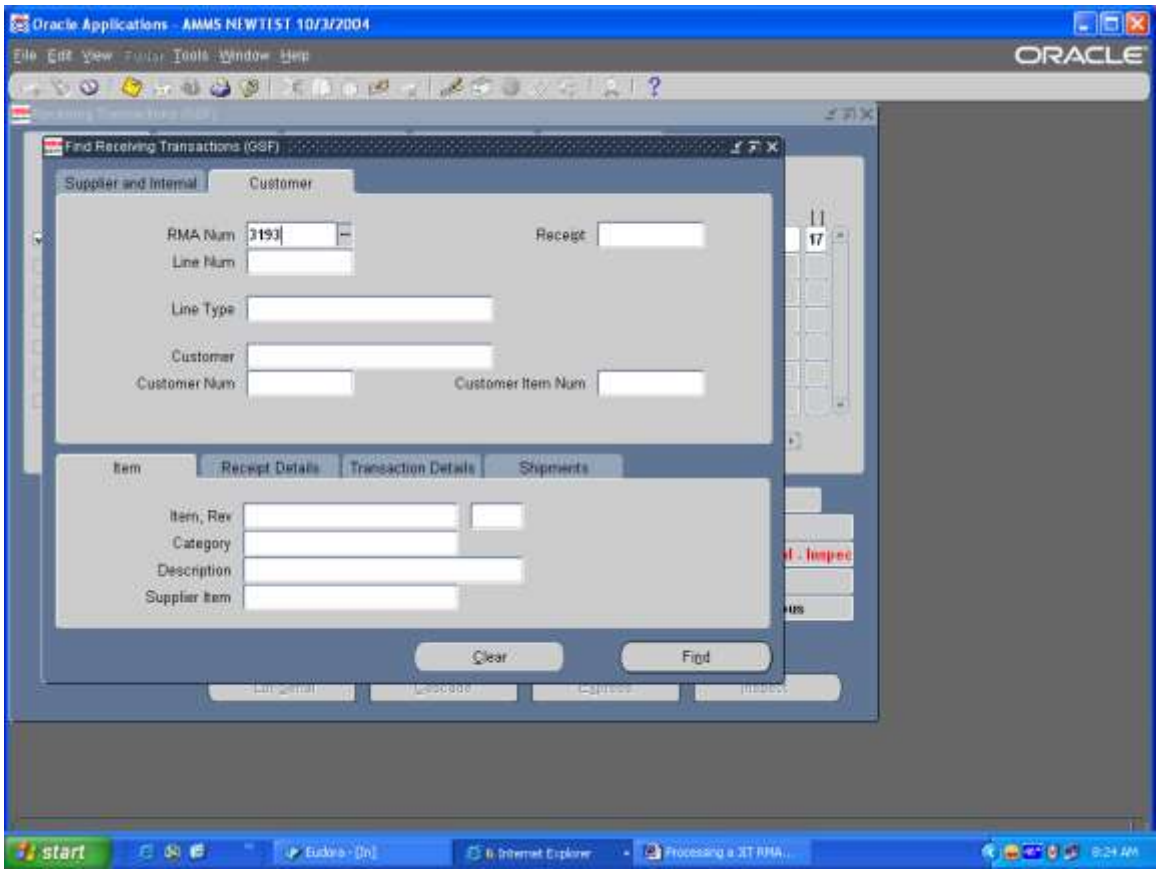
Step Description: Select from the toolbar the “flashlight” (find)

Expected Results/Actions: This will return you to the Find Receiving Transactions Window



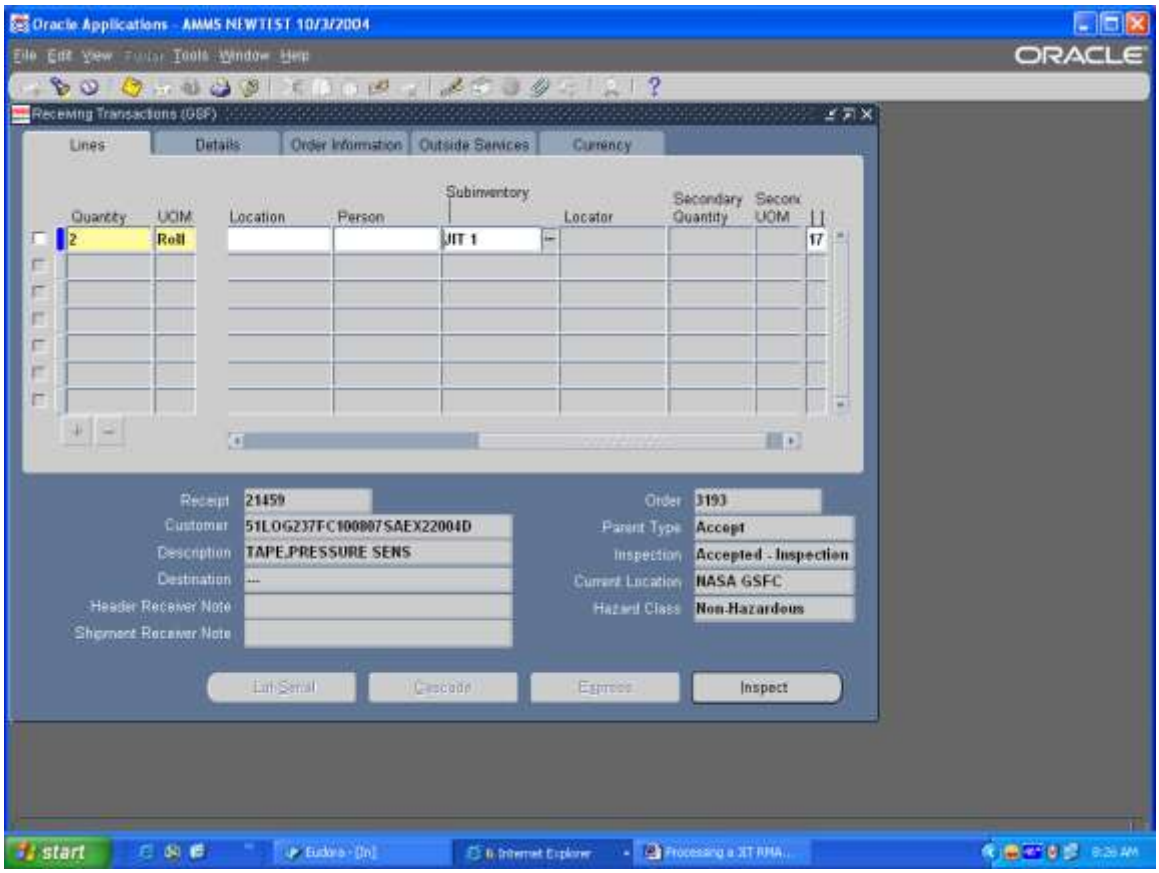
Step Description: Again click on the Customer tab and enter the RMA # in the RMA # field and click on the Find button.

Expected Results: You will return to the Receiving Transactions window



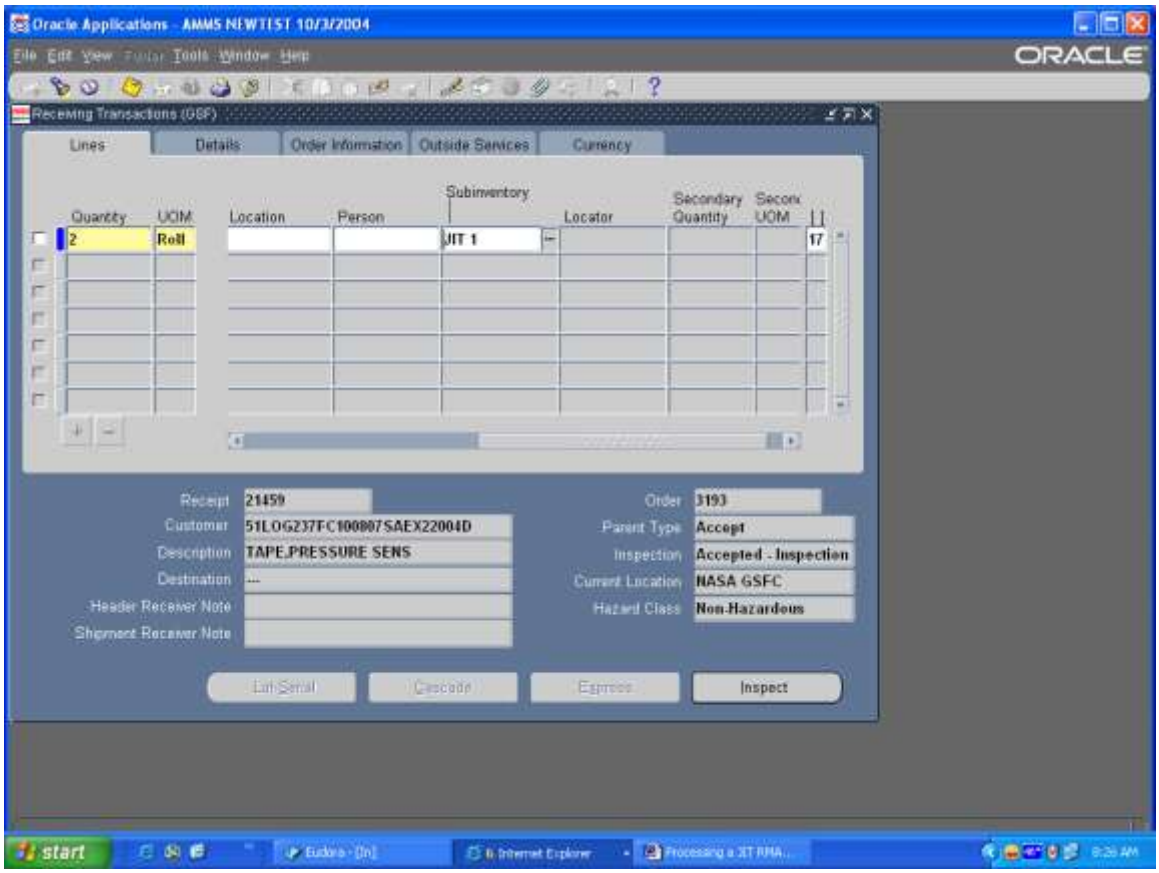
Step Description: This is where you will Deliver the material to Inventory. Using the scroll bar, slide to the right until you see the Sub Inventory field, click in that field and select the LOV. Select the appropriate sub inventory from the list and click OK.

Expected Results: Field will be populated.



Step Description: From the toolbar select the Save icon and Save your work

Expected Results: Message at the bottom of the screen, Transactions Complete, 1 record applied and saved.

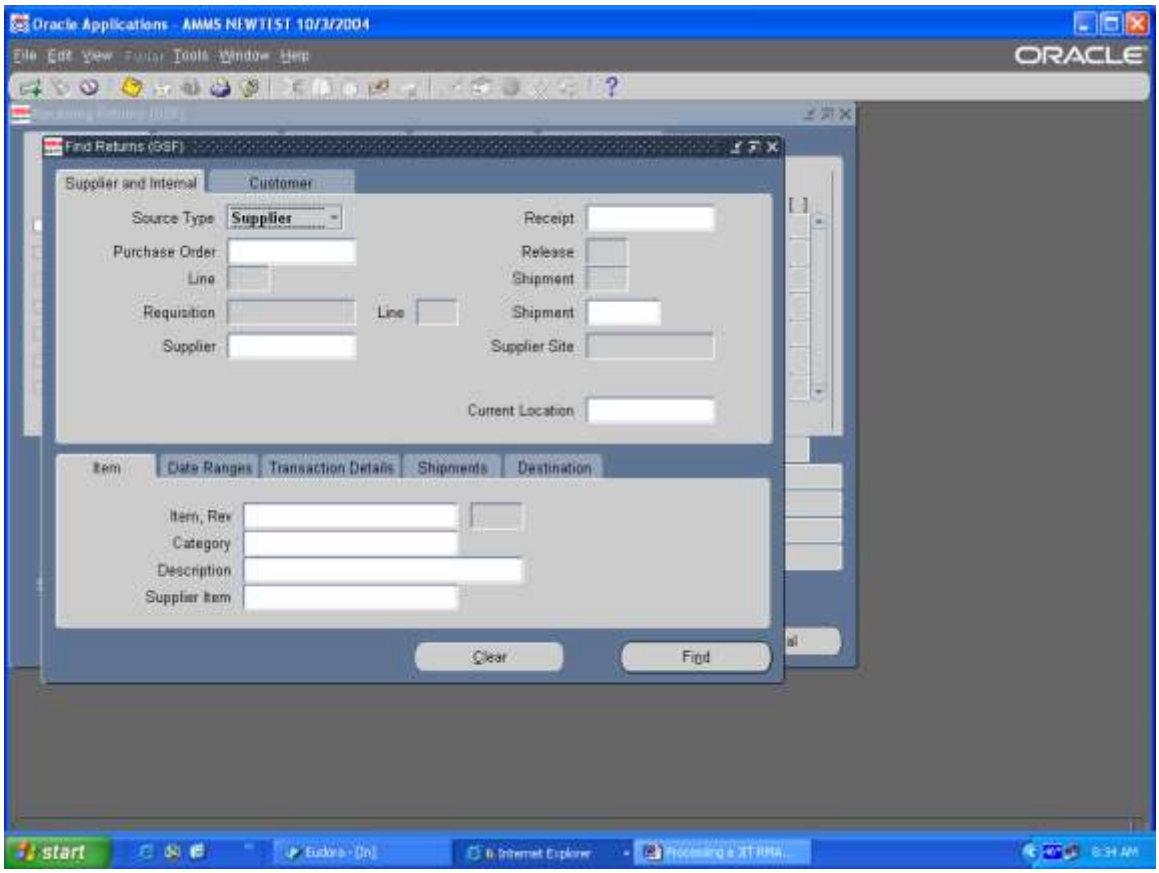


Step Description: Close all forms and return to the IM Inventory Main Menu.

You have just delivered the RMA to inventory and now a balance is on hand, for JIT items there should NEVER be a balance on hand. You now need to return the material to the vendor in Oracle.

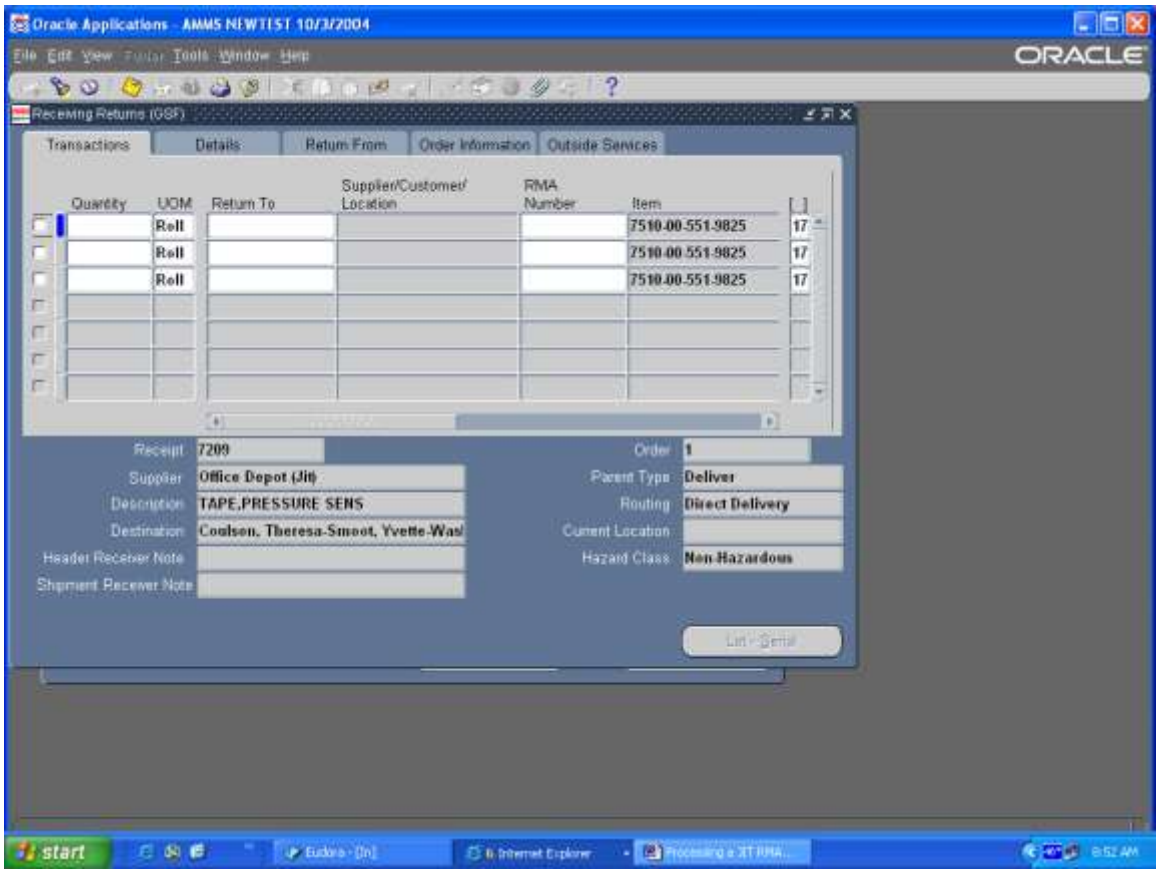
Step Description: From the IM Inventory Main Menu select Transactions > Receipts >Returns

Expected Results: The Find Returns window will open.



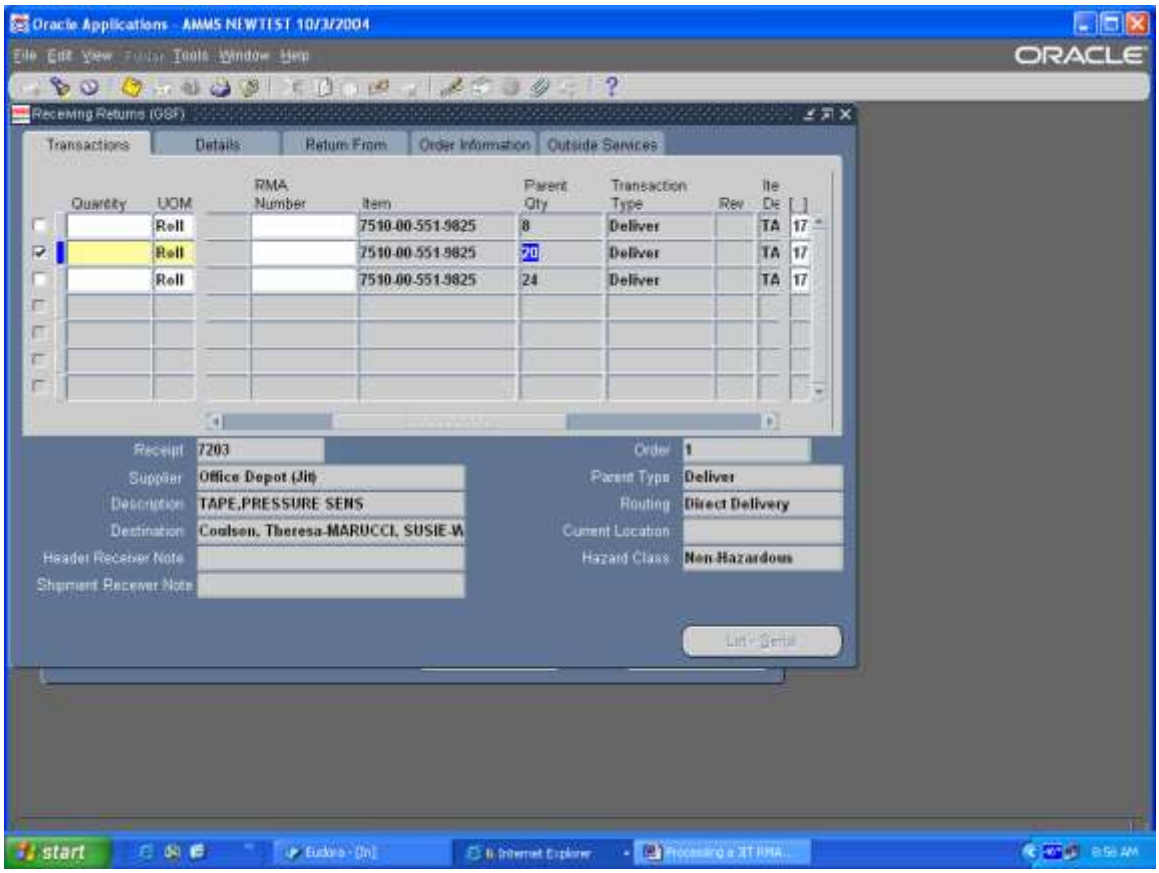
Step Description: For JIT returns you will need to know the release number that the original sales order was on. At the Find Returns screen enter the PO #, Release # and the Item Number, click on the Find button.

Expected Results: Field will be populated and the Receiving Returns window will open.



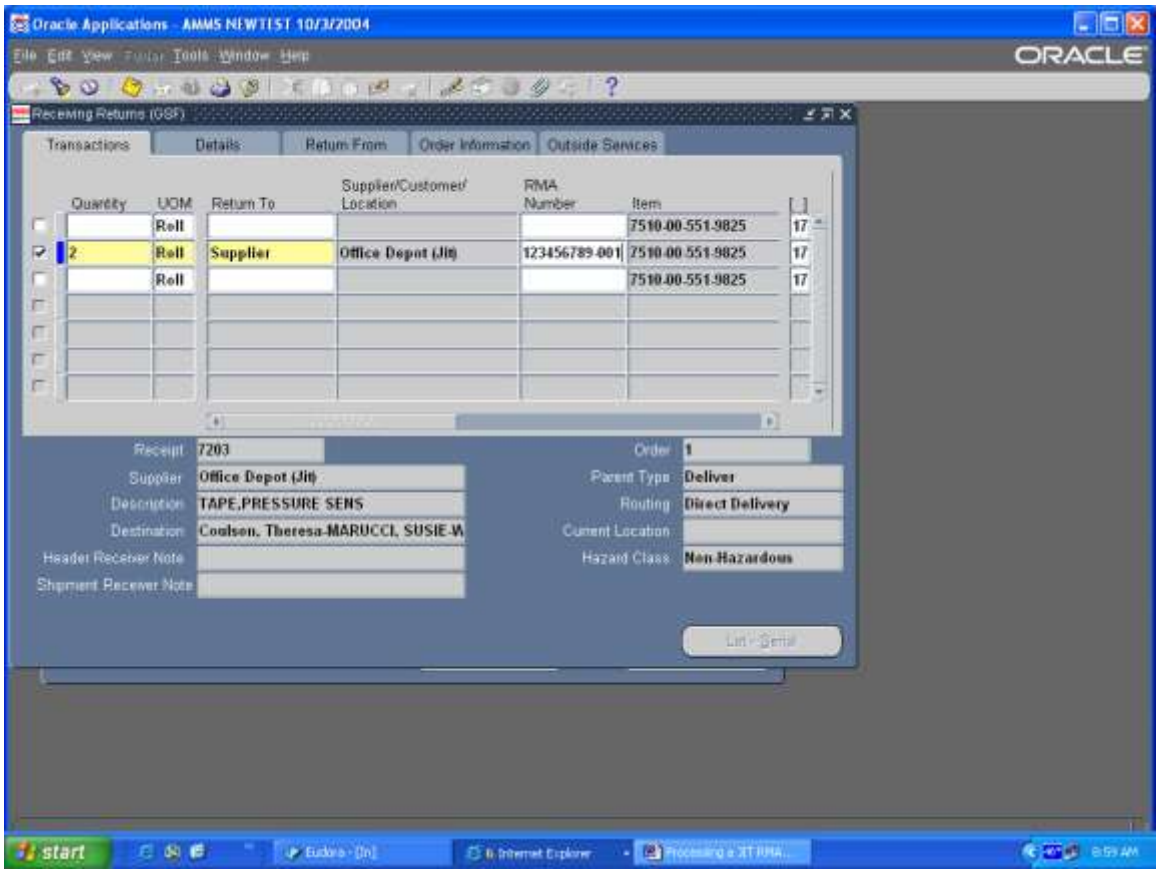
Step Description: You will need to select the correct line for the return, you do this by selecting the line that was for the original qty that was on the original sales order. Scroll to the right and you will see the Parent Qty field, select the correct line.

Expected Results: The curser will be on the correct line to perform the Return to Vendor transactions.



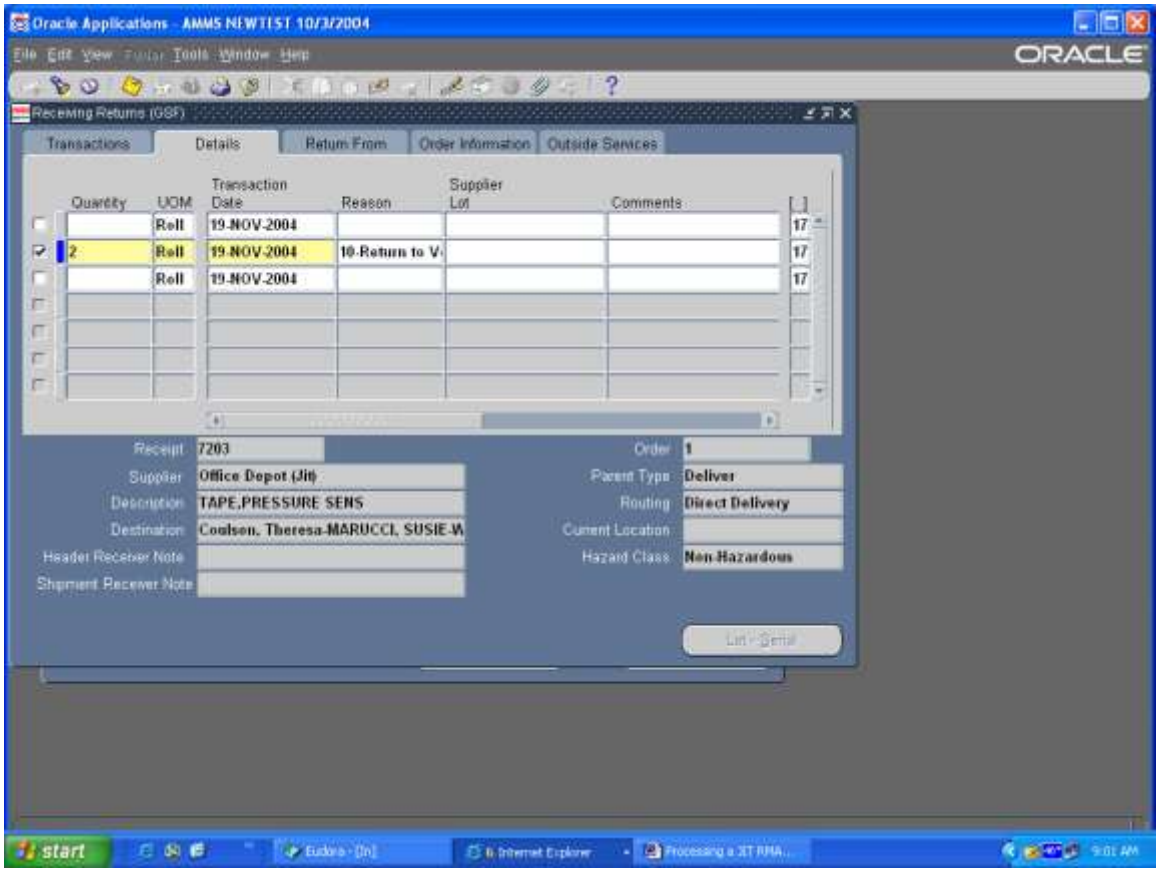
Step Description: Place your curser in the qty field and enter the qty that was returned by the customer, then tab to the Return To field and click on the LOV and select Supplier, then tab to the RMA number field and enter Office Depot order number for the return.

Expected Results: Fields will be populated.



Step Description: Select the Details tab and place your curser in the Reasons field and click on the LOV and select 10-Return to Vendor from the list.
<u>THE REASON CODE MUST BE ENTERED.</u>

Step Description: Field will be populated



Step Description: From the toolbar select the Save icon and Save your work.

Expected Results: Message at bottom of screen Transactions Complete, 1 record saved and applied.

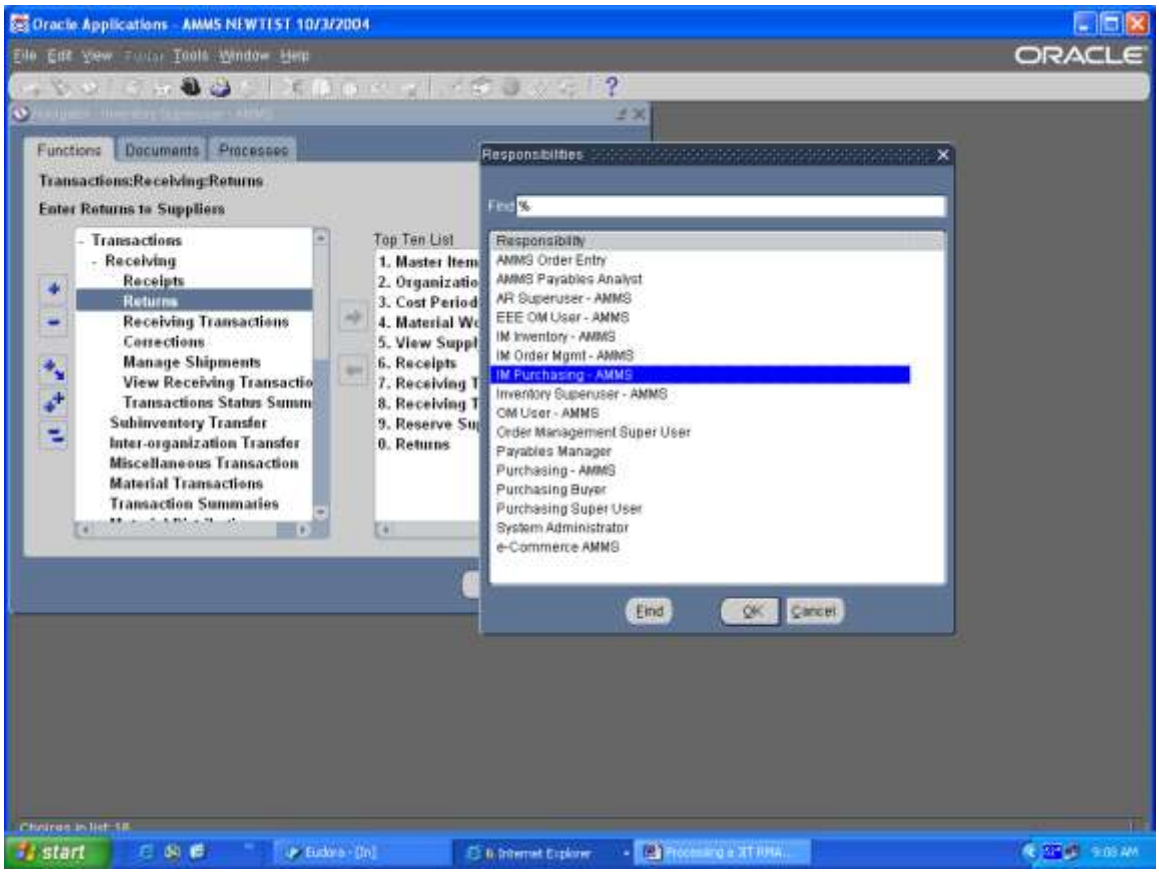
The on hand balance has now been removed and made to look like the purchase order is “due in” again.

Step Description: Close all forms.

Expected Results: Return to the IM Inventory Main Menu

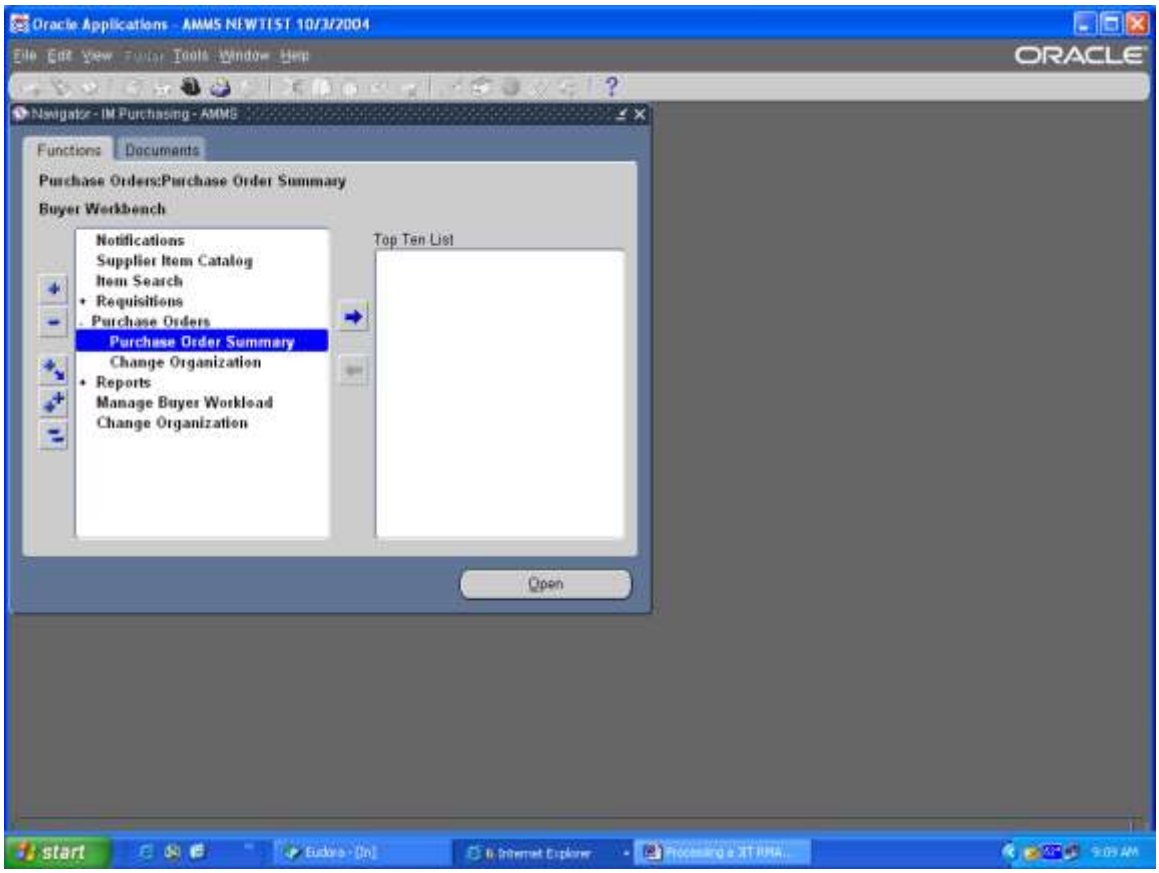
Step Description: Change responsibilities select the IM Purchasing responsibility.

Expected Results: The IM Purchasing main menu window will appear.



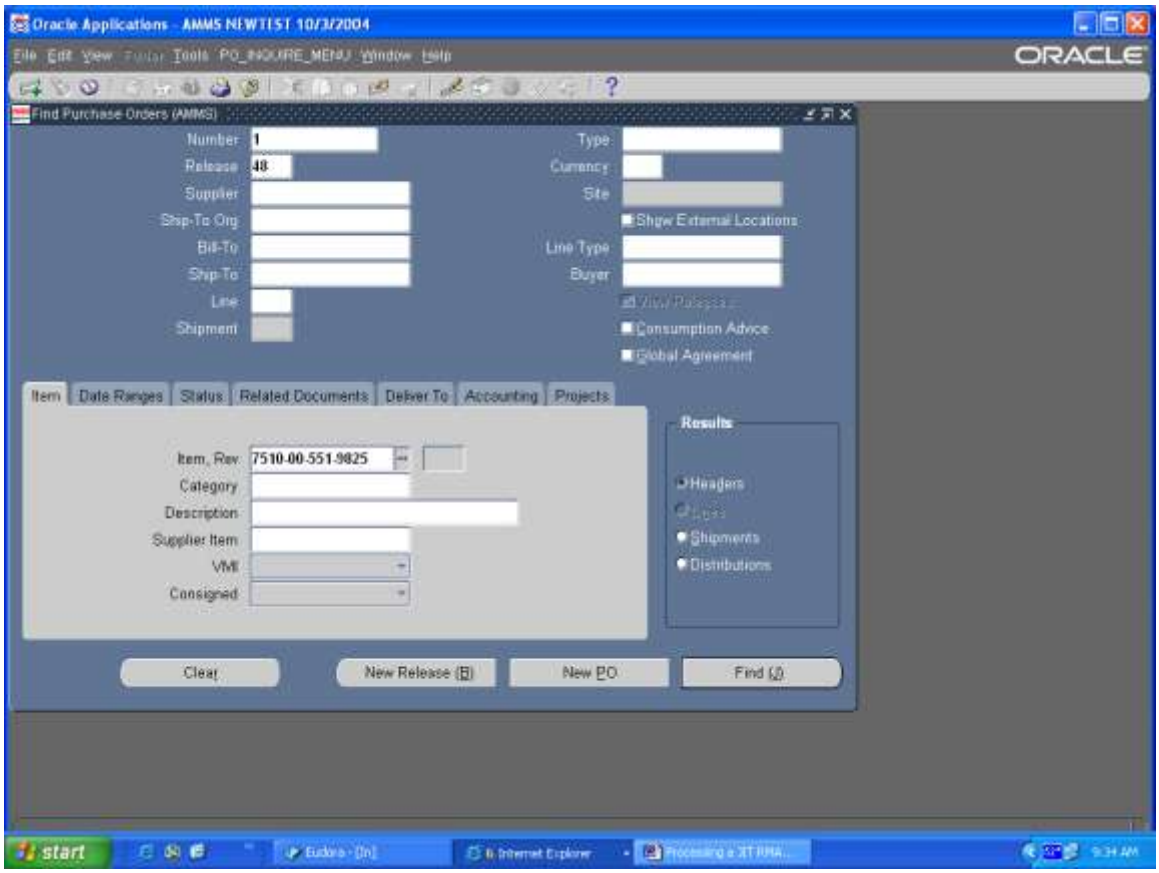
Step Description: From the IM Purchasing main menu select Purchase Orders > Purchase Order Summary click on the Open button

Expected Results: The Find Purchase Orders window will open.



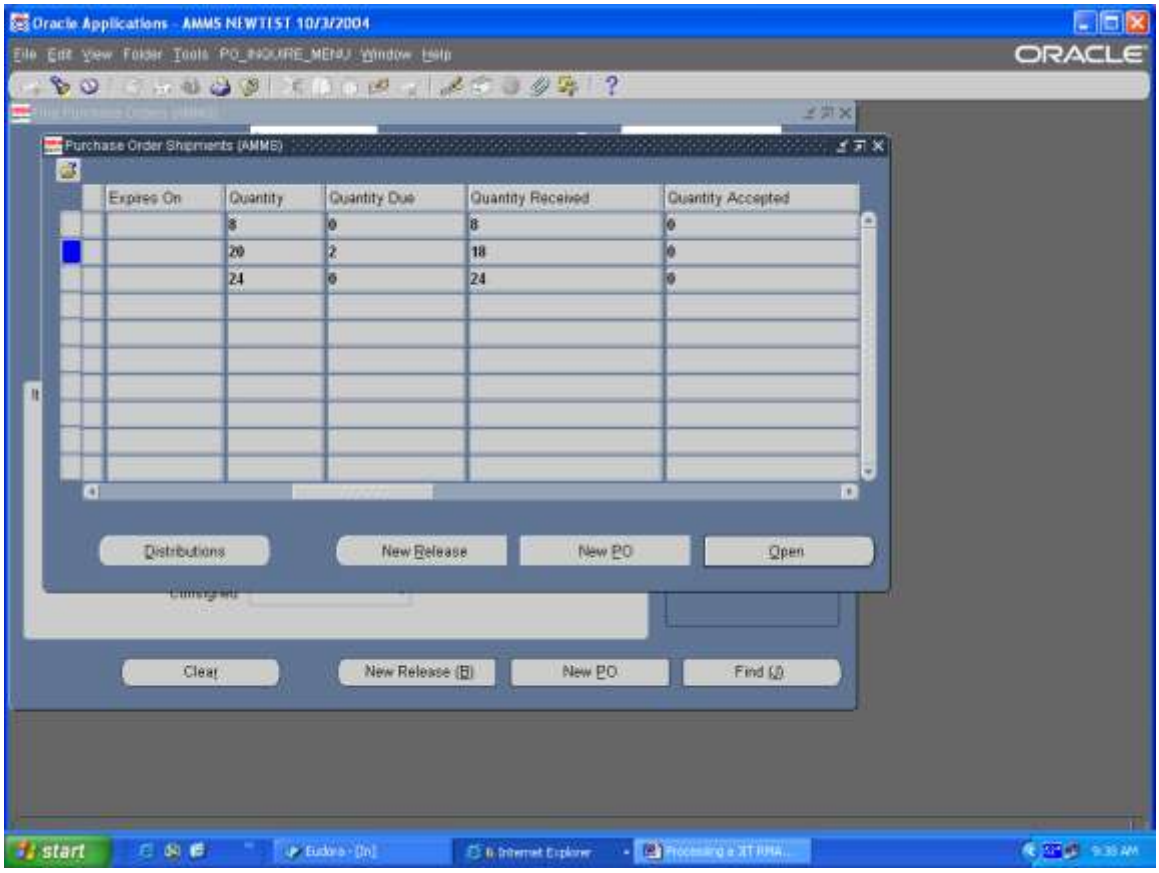
Step Description: In the Number field enter the PO #, in the Release field enter the release #, in the Item, Rev field enter the item #, click on the Find Button

Expected Results: The fields will be populated and the Purchase Orders Shipments window will open.



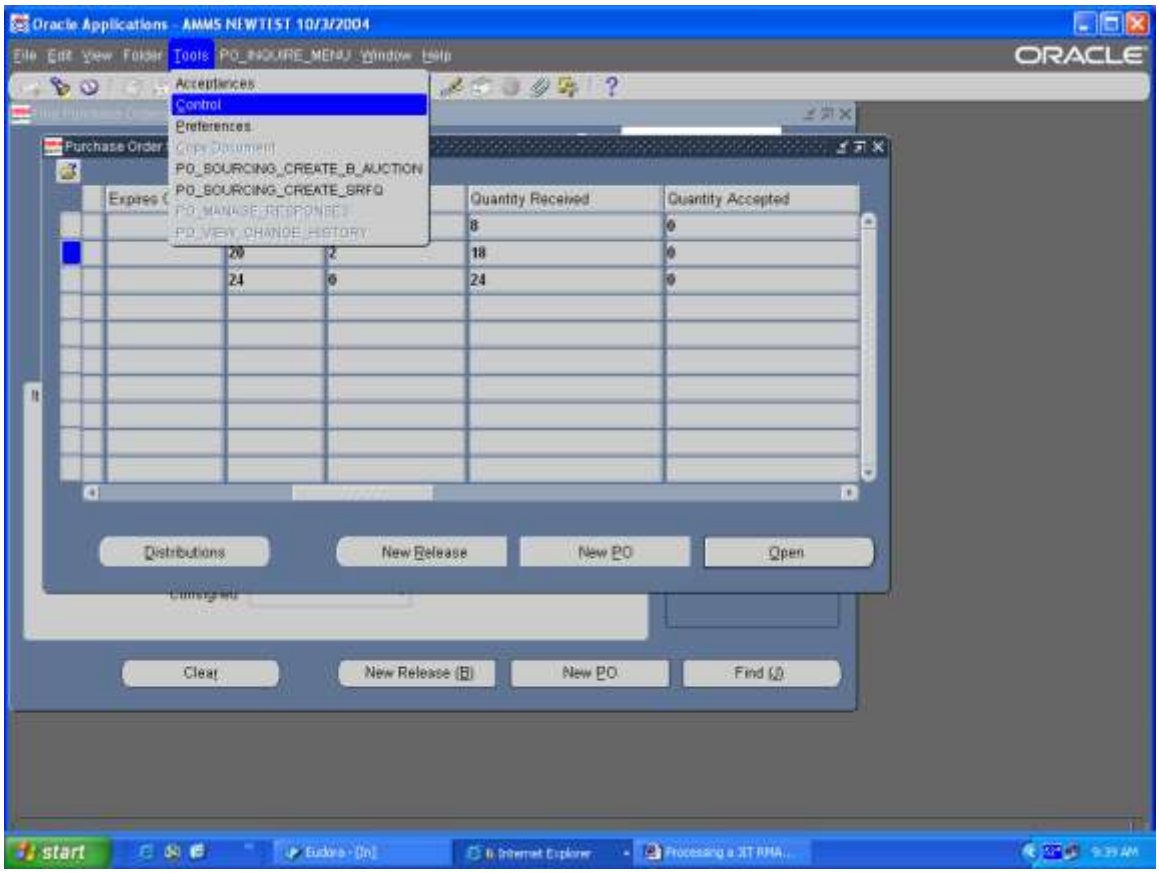
Step Description: Use the scroll bar and move to the right and find the appropriate line that you need to cancel, you will need to match up the original qty ordered and find the line that now has a qty due.

Expected Results: You will move to the right and see qty data.



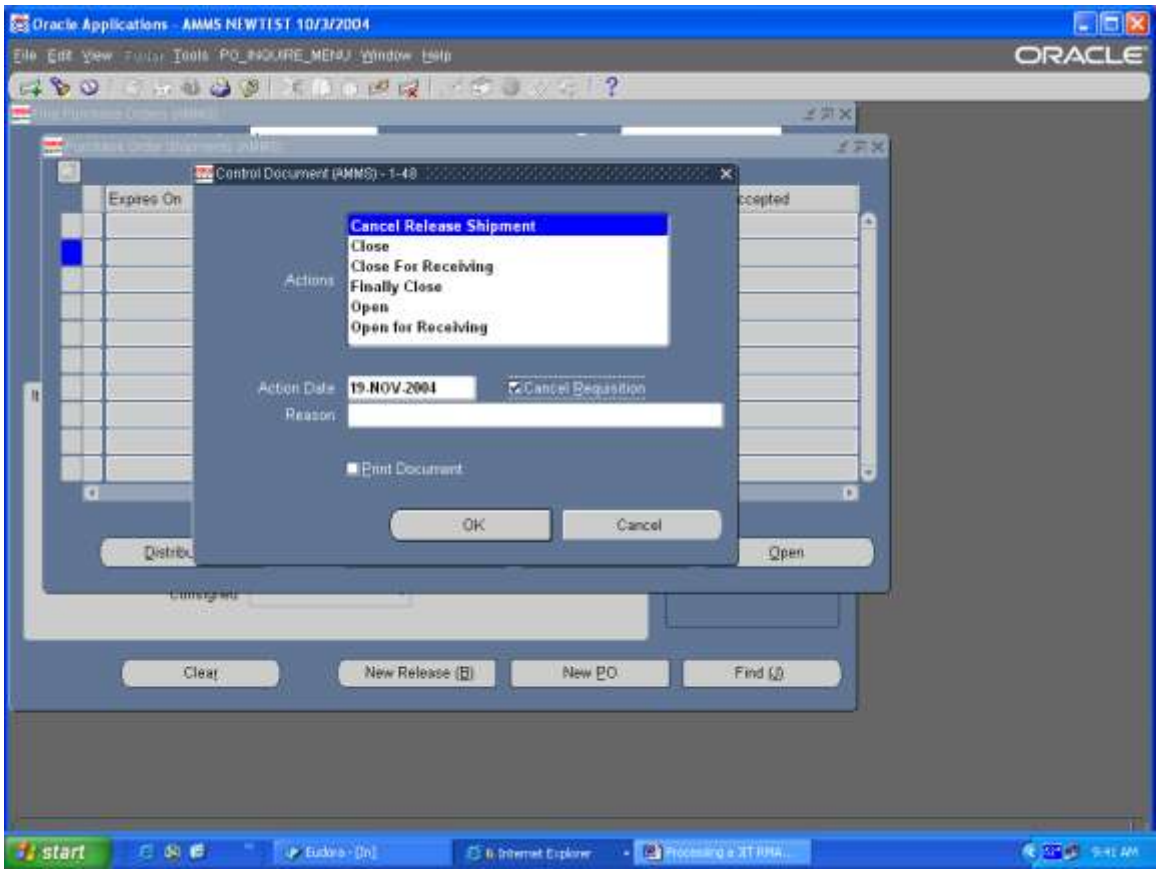
Step Description: Once you have selected the correct line, place your curser on that line, and from the toolbar select Tools > Control

Expected Results: The Control Documents window will appear



Step Description: From the Control Documents window select Cancel Release Shipments, then also check the Cancel Requisitions box, click OK.

Expected Results: You will get a Caution Note



Step Description: Click OK to the Caution Note.

Expected Results: You will receive another Note.

Step Description: You will receive another Note saying Control Actions Complete. Click OK to this Note.

Expected Results: You will return to the Purchase Orders Shipments window.

Step Description: Close all forms.

Expected Results: Return to the IM Purchasing Main Menu

The process for the JIT RMA is complete.

Notes:

The JIT RMA process needs to be completed all in the same day, DO NOT do half of the steps on day and complete the transaction the next day, this will mess up the daily reconciliation. The ENTIRE process must be done on the same day.

AMMS TRAINING SCRIPT
Return to Supplier

Purpose

The purpose of this training script is to instruct users how to perform a return to supplier transaction for purchase order

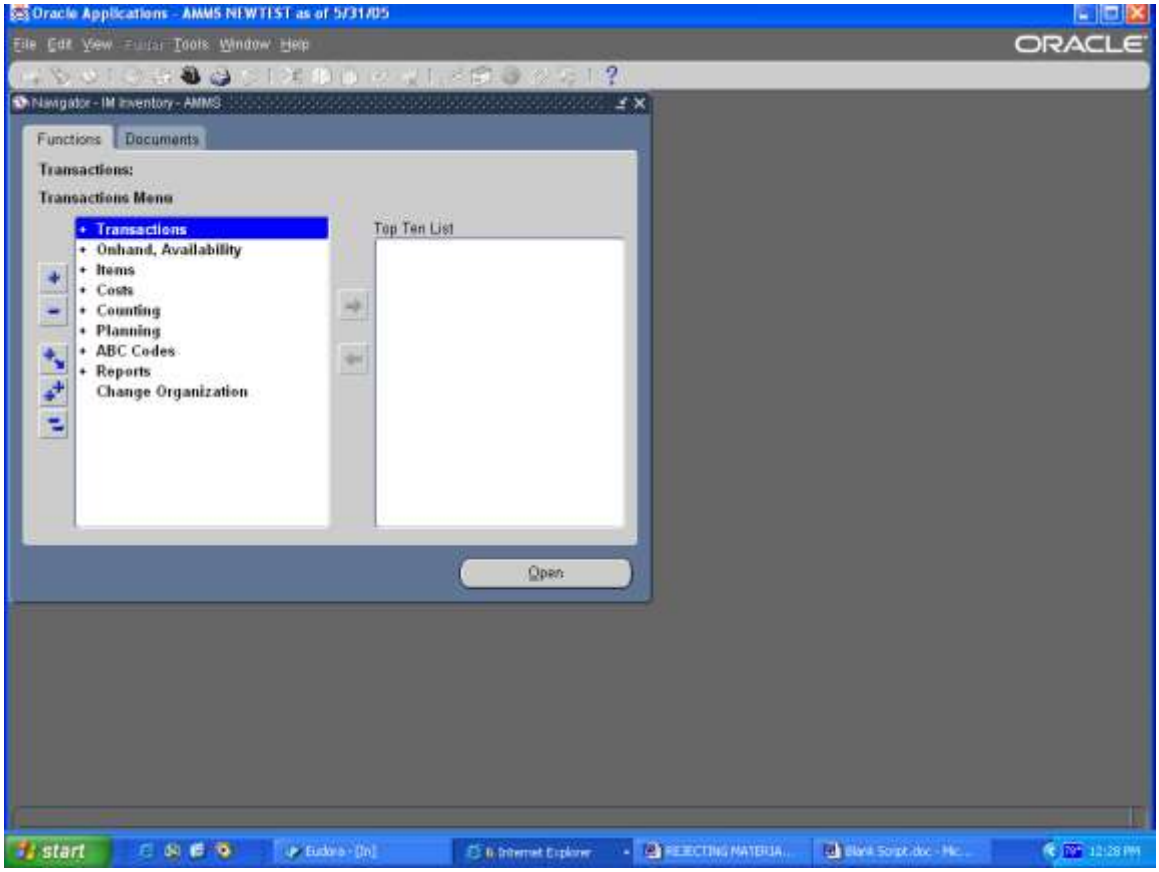
Audience

Material Coordinator and Supply Technician Team Lead

Prepared By	Theresa Coulson
Creation Date:	06/21/2005
Document Name	Return to Supplier.doc
Version	2
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Inventory.	

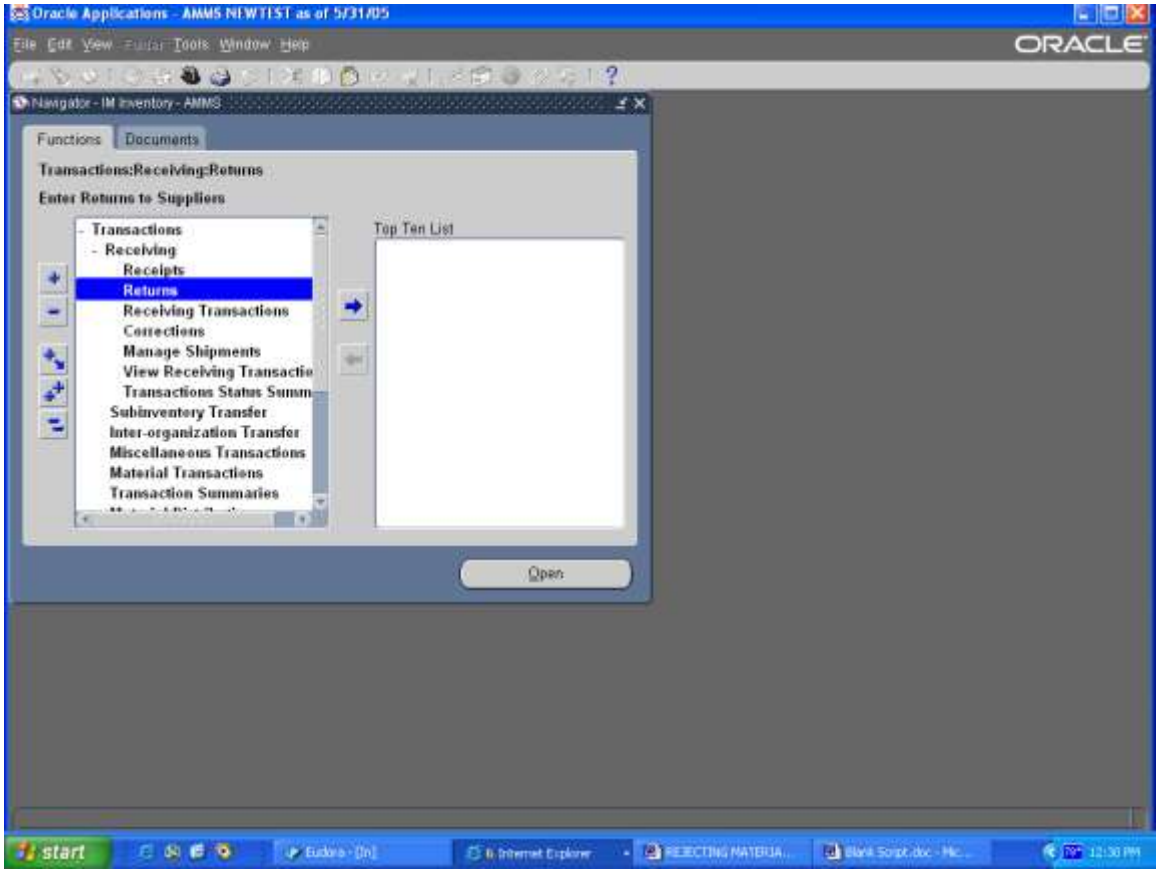
Step Description: Sign onto Oracle and select your IM Inventory AMMS responsibility

Expected Results: IM Inventory AMMS main menu will appear



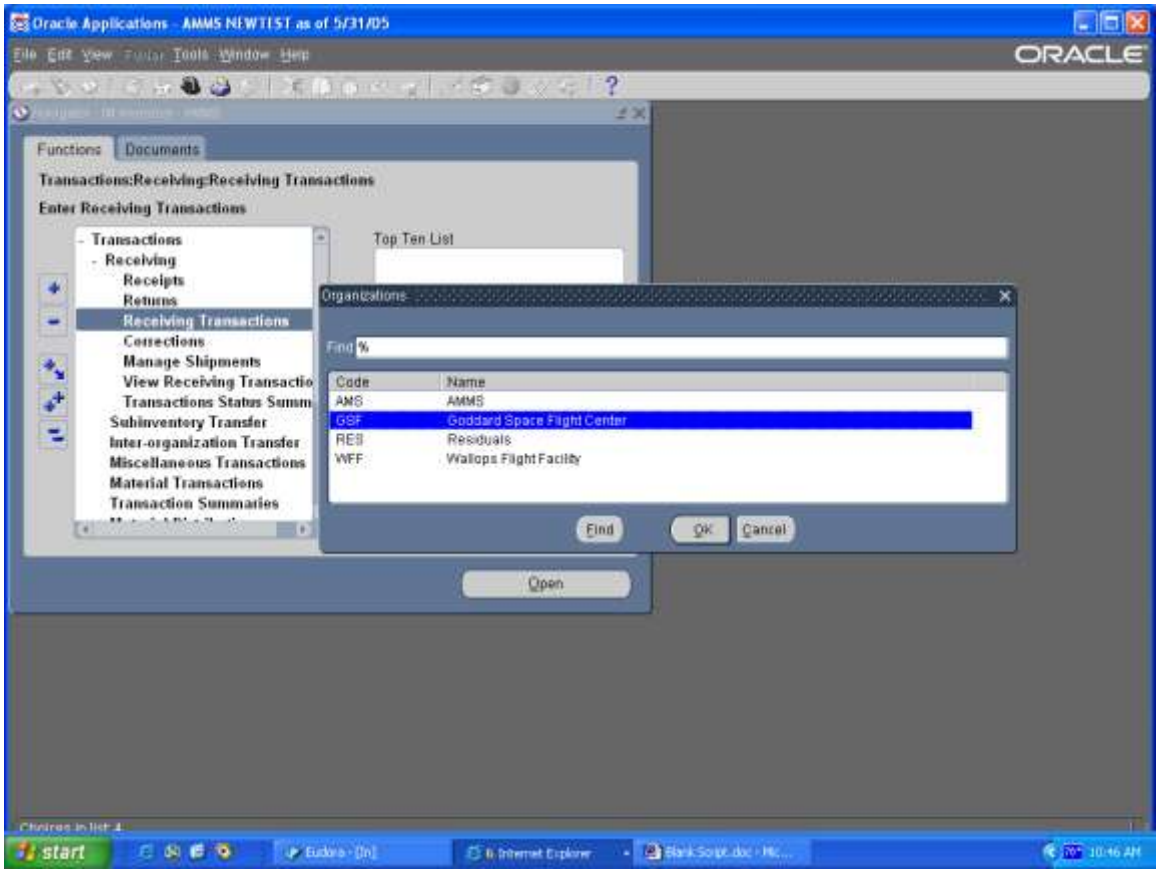
Step Description: From the IM Inventory AMMS main menu select Transactions > Receiving > Returns click on the open button

Expected Results: Organization window will appear



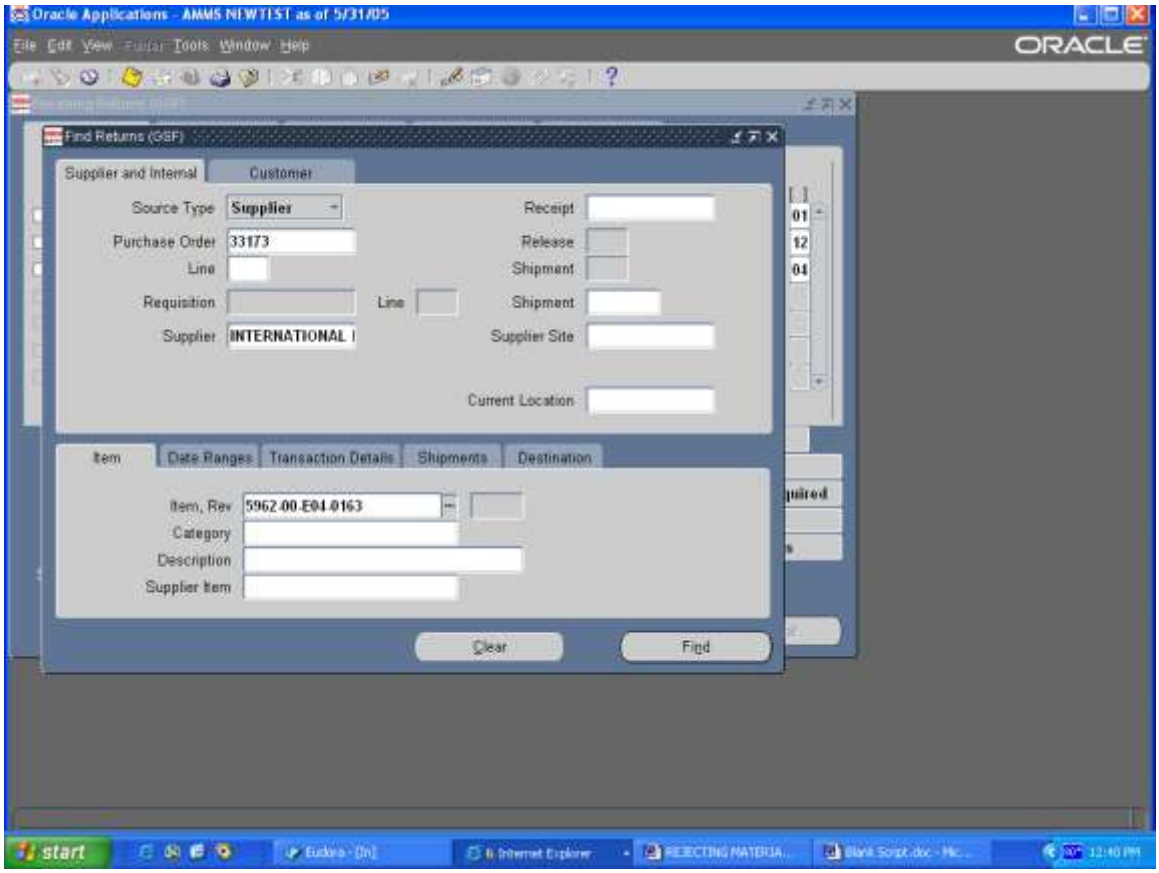
Step Description: Choose the appropriate organization GSF for Goddard or WFF for Wallops click the OK button

Expected Results: Find Returns window will appear



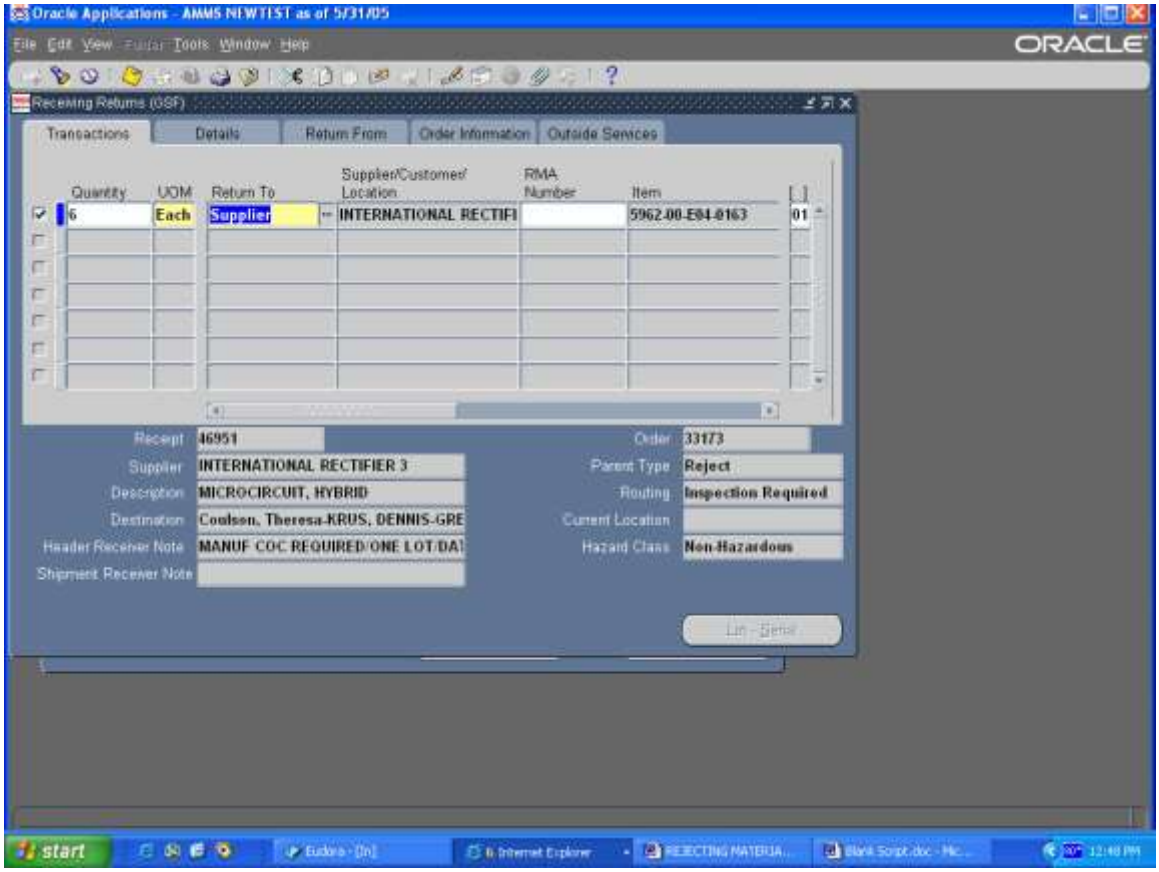
Step Description: In the Purchase Order field enter the purchase order number for the material that was rejected. You can also enter the item number, this will make the search more specific. Click on the Find button

Expected Results: Receiving Returns window will appear



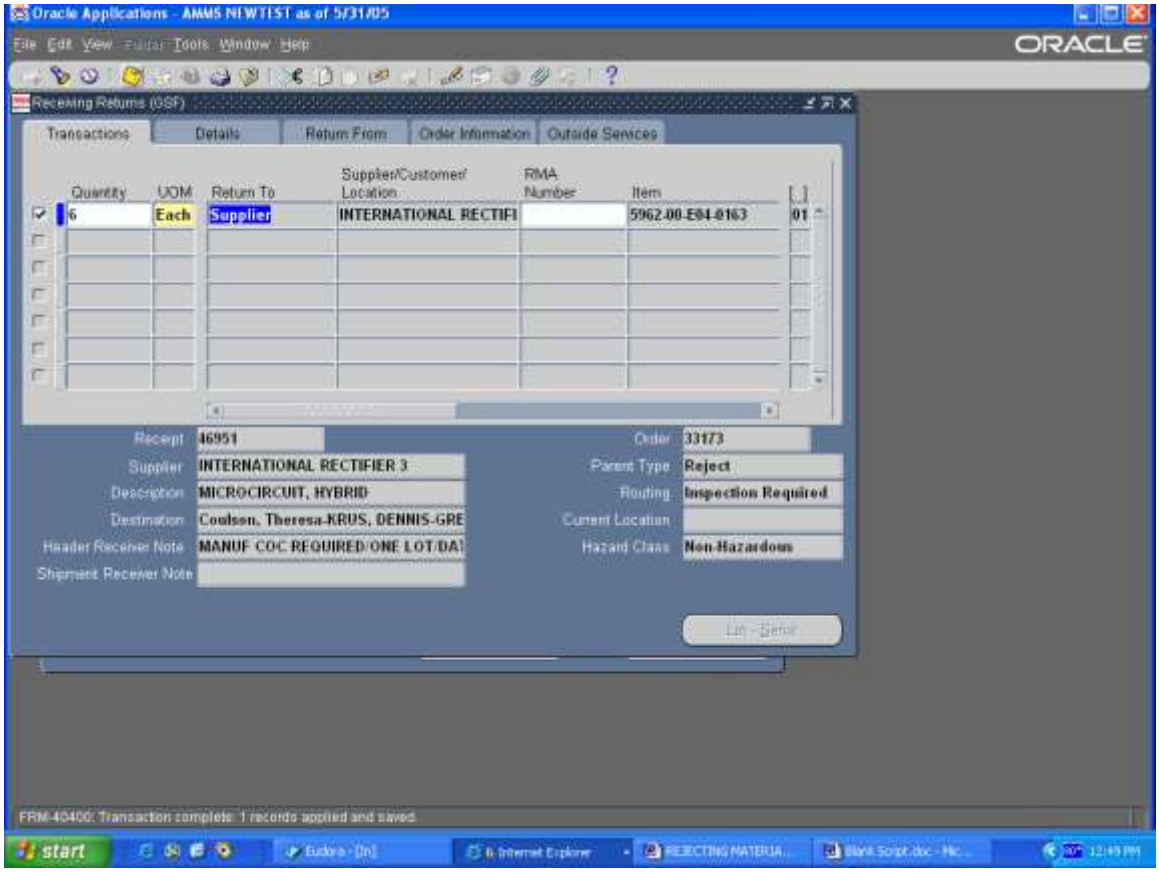
Step Description: Select the line that you want to do the Return for, if your scroll to the right you will see the Parent Qty. Place a check mark in the box at the beginning of the line, go to the qty field and enter the qty that is to be transacted against, tab to Return To field and click on the List of Values, Supplier will default.

Expected Results: Fields will be populated



Step Description: Save your work

Expected Results: Transaction Saved and Applied message



The Purchase Order is now “due in” again, and all appropriate paperwork, receiving discrepancy form must be forwarded to the inspectors to process the material.

AMMS TRAINING SCRIPT
Sub Inventory Transfer

Purpose

The purpose of this training script is to transfer between sub-inventories.

Audience

Material Coordinators, Supply Technician Leads, Warehousemen, and Inspectors

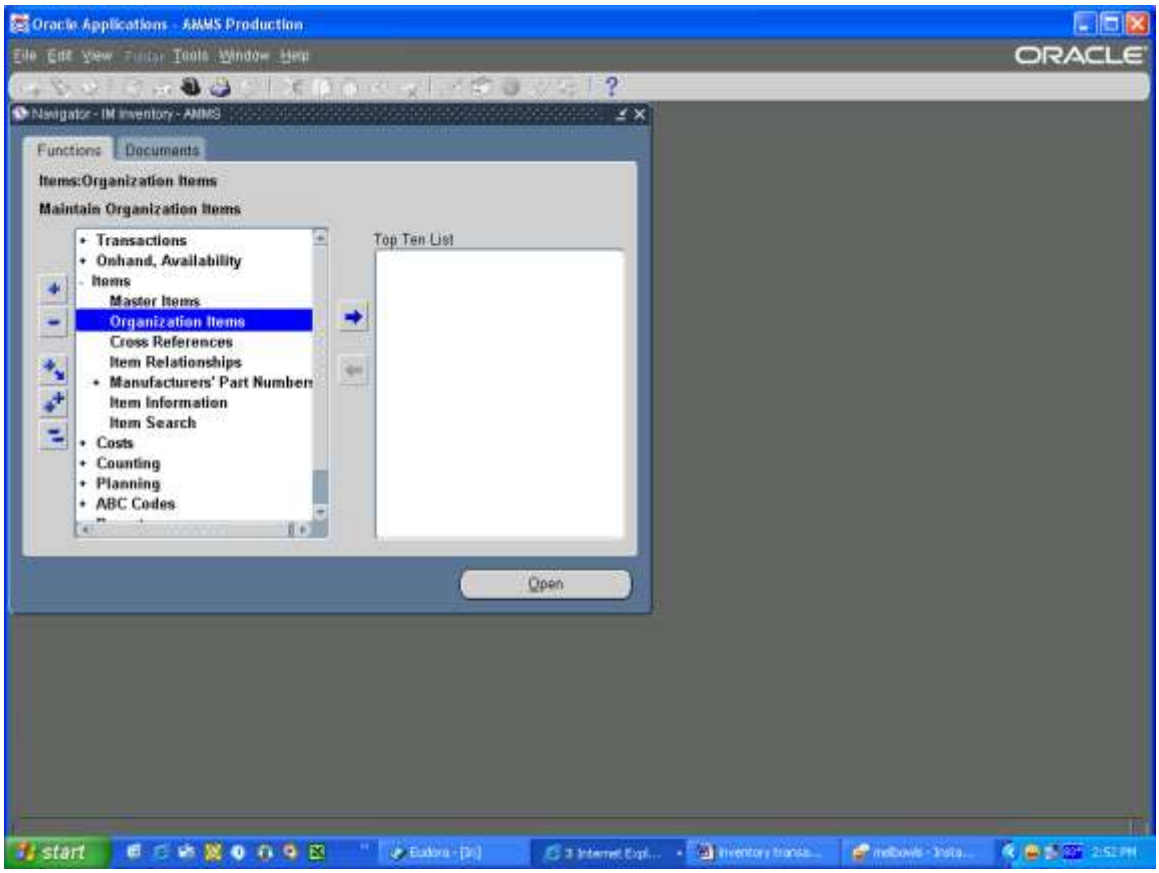
Prepared By	Theresa Coulson
Creation Date:	02/01/2005
Document Name	Sub Inventory Transfer.doc
Version	2
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Inventory.	

AMMS Training Script:

When doing a Sub Inventory Transfer you first need to make sure that all of the locators involved with the item are loaded at the Organization level.

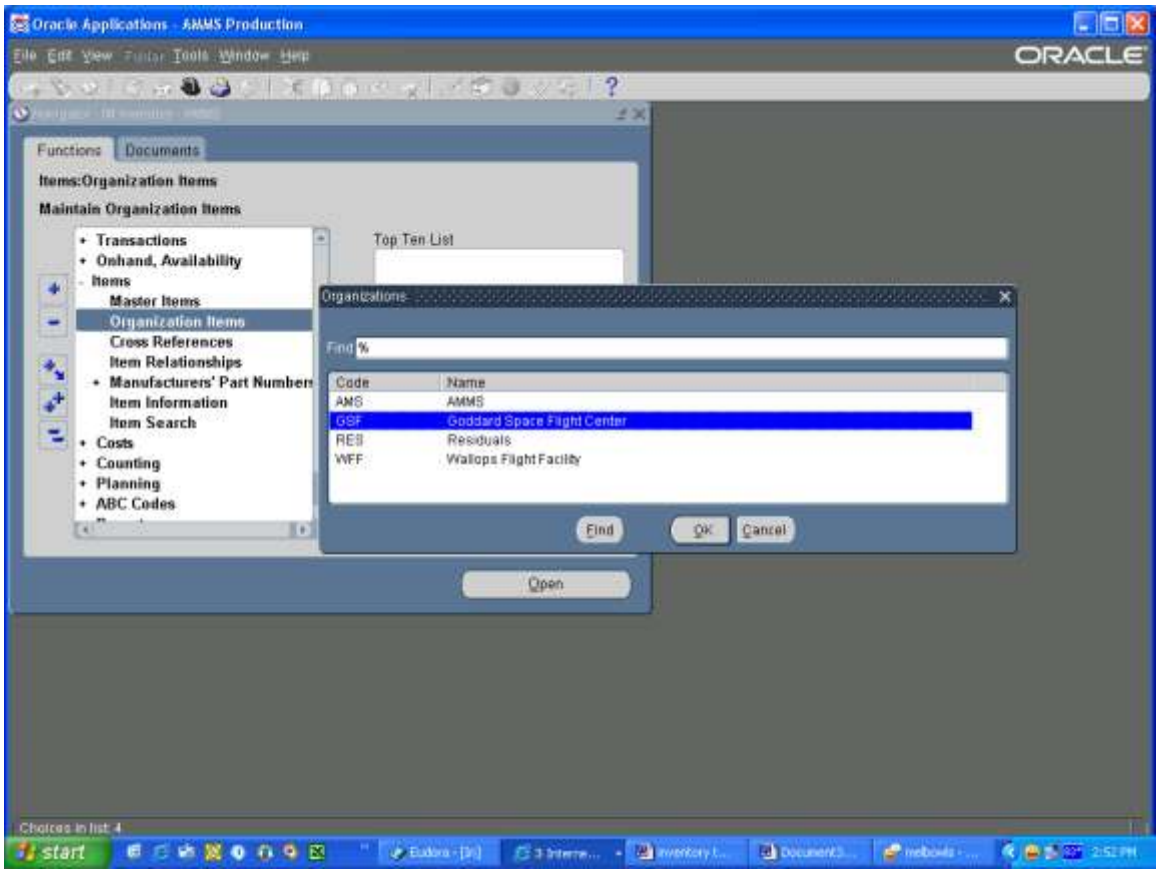
Step Description: Sign onto Oracle and select your IM Inventory AMMS responsibility. Select Items> Organization Items.

Expected Results: You will be at the IM Inventory AMMS main menu



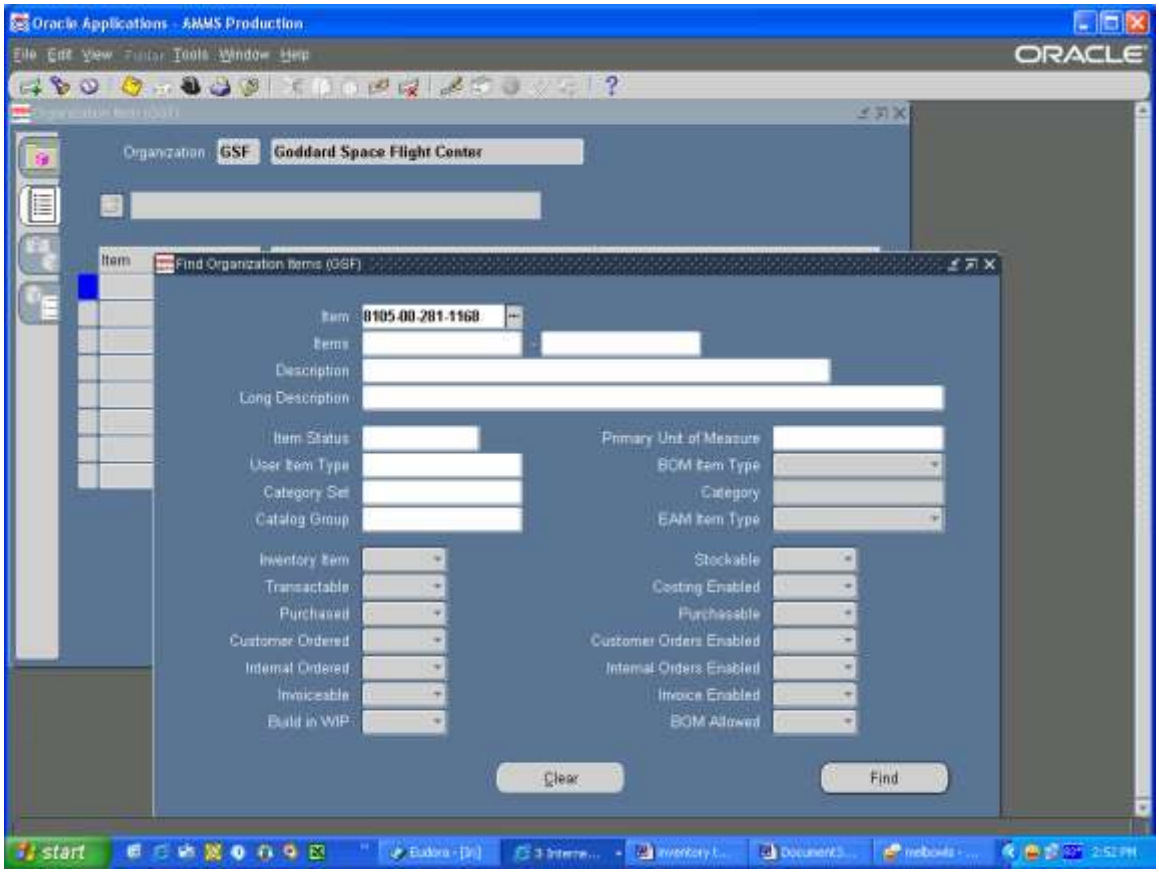
Step Description: Select the GSF Organization.

Expected Results: You will be at the Find Organization Item window



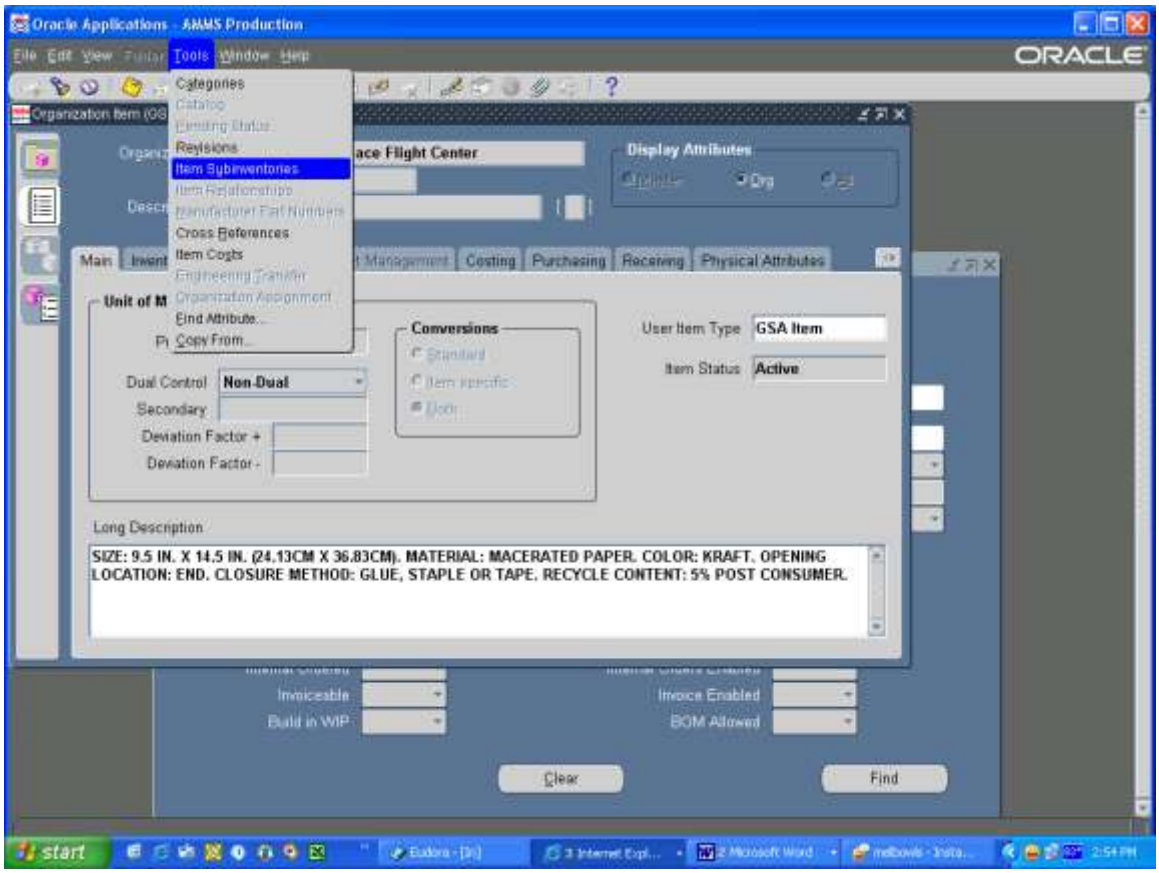
Step Description: In the Item field enter the Stock Number and then click on the Find button.

Expected Results: You will be at the Organization Item window



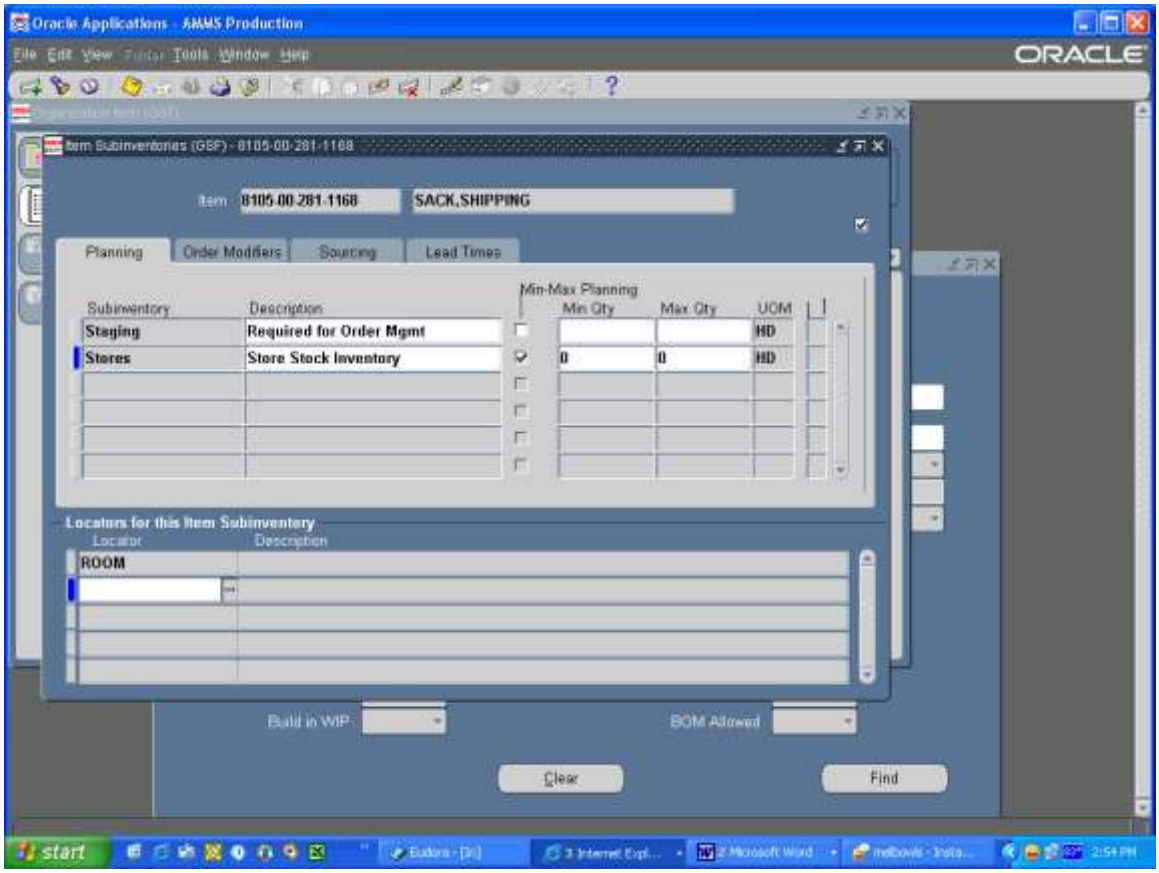
Step Description: From the toolbar Select Tools, Item Sub Inventories

Expected Results: The Item Sub Inventory window will appear



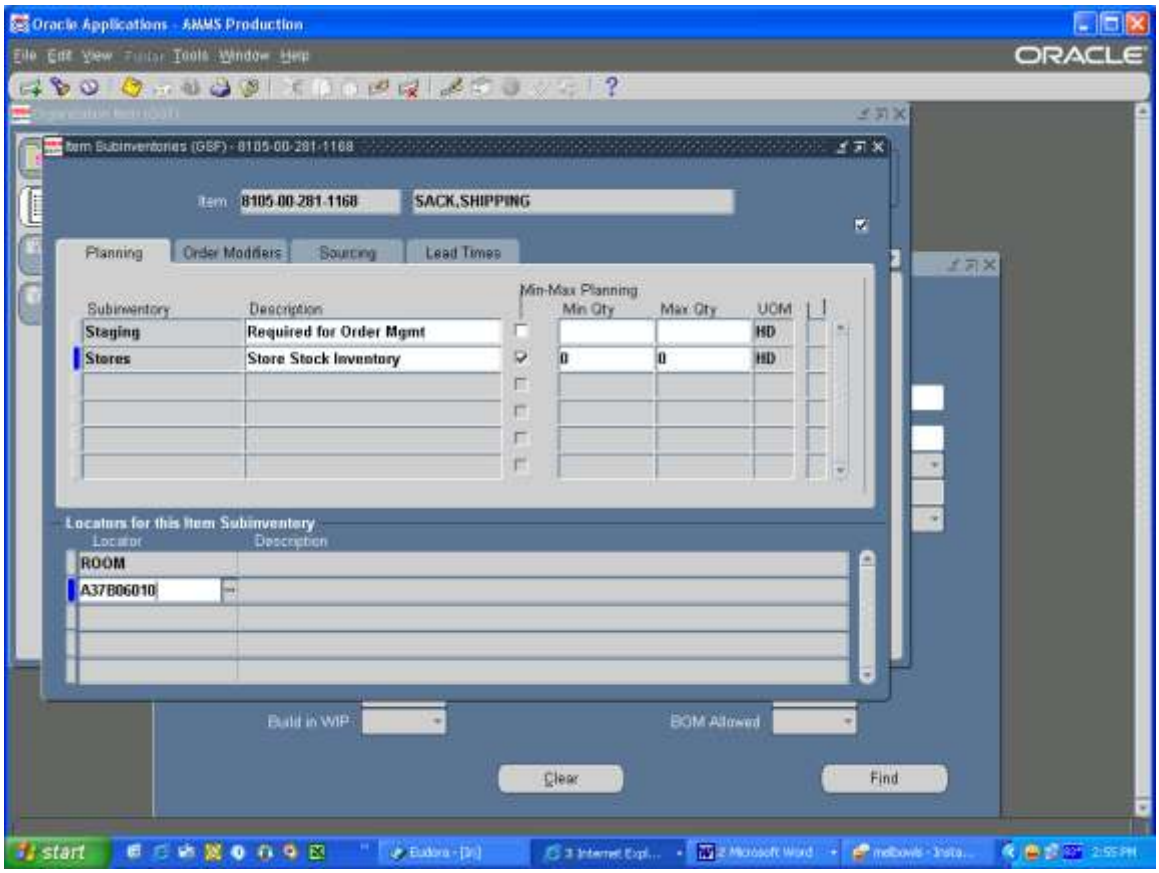
Step Description: Click on the appropriate Sub Inventory, so that the blue cursor is next to Stores. Move to the bottom of the screen and you will see the locators that are assigned to this item for this sub inventory. Click on the next available line.

Expected Results: Curser will move to bottom of the screen



Step Description: In the next available line enter the new locators for the items, if there are multiple locators, just keep selecting the next available line and enter all locators. Once you have entered all of the locators for the items Save your work.

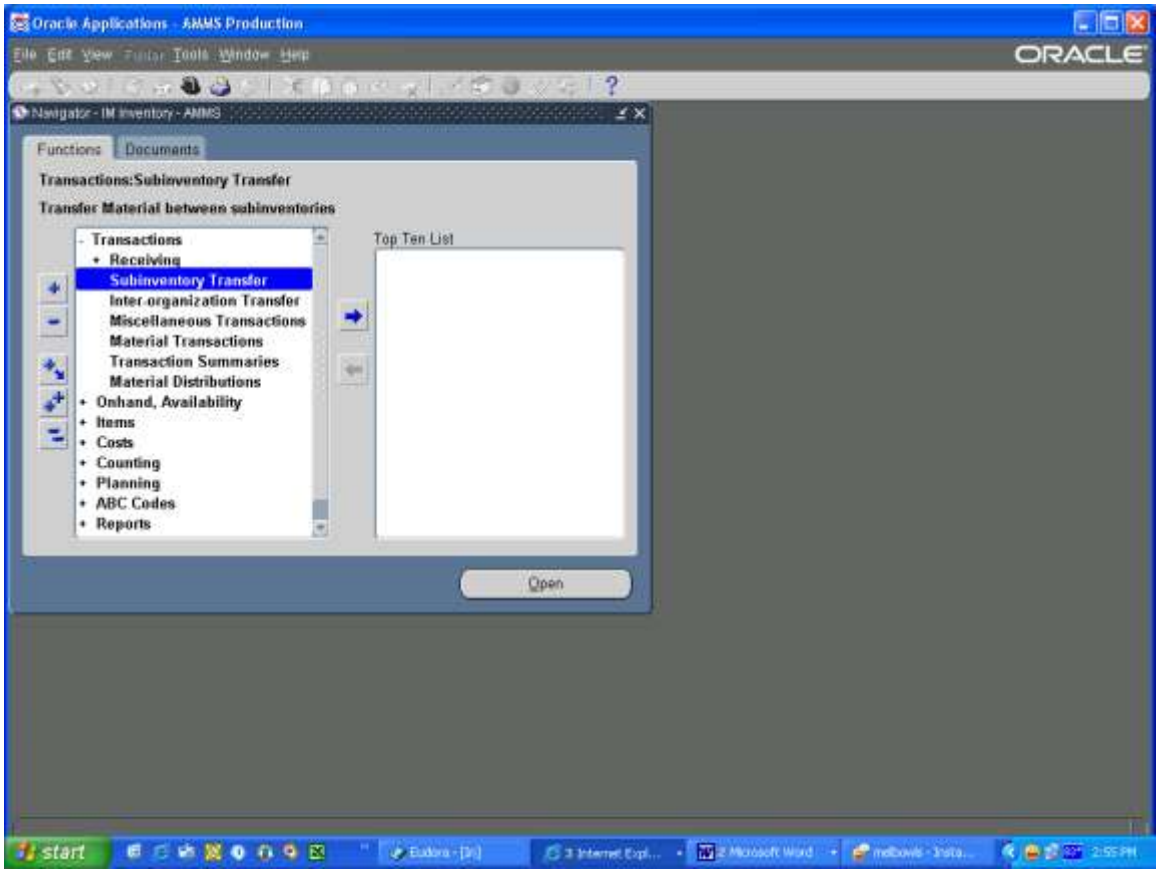
Expected Results: Locators will be added, Transaction Complete note.



NOTE: This completes adding locators to items. Close all screens.

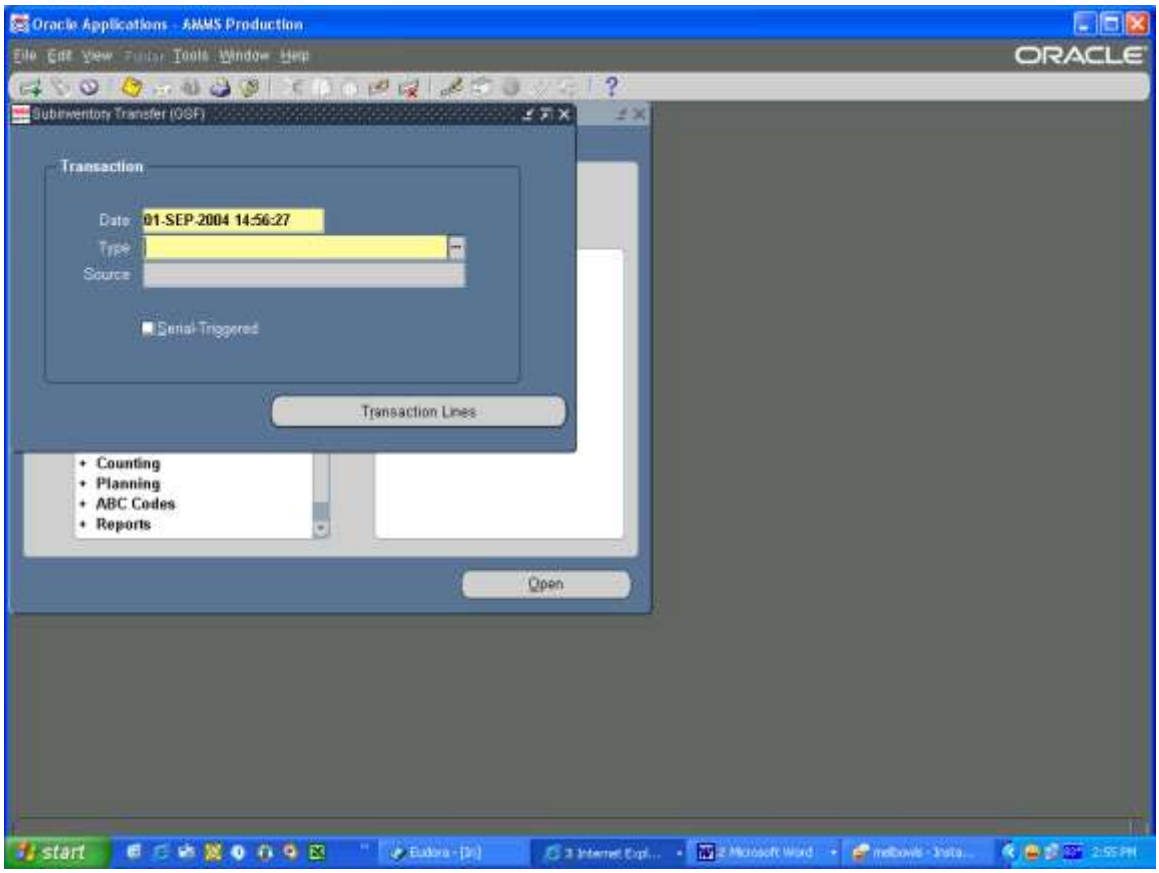
Step Description: From the IM Inventory AMMS responsibility main menu: Select Transactions > Subinventory Transfer

Expected Results: Sub Inventory Transfer window will appear.



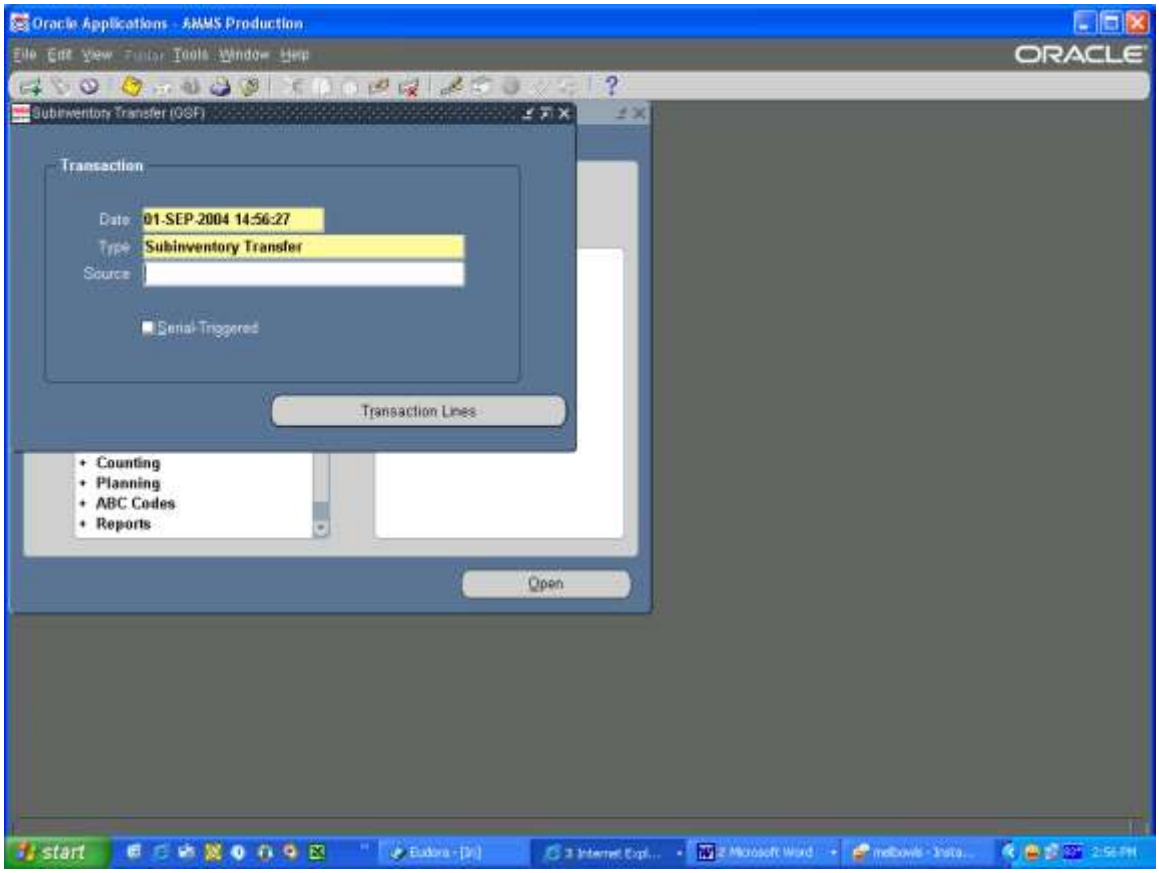
Step Description: In the Type field click on the LOV Sub Inventory Transfer will default

Expected Results: Field will be populated



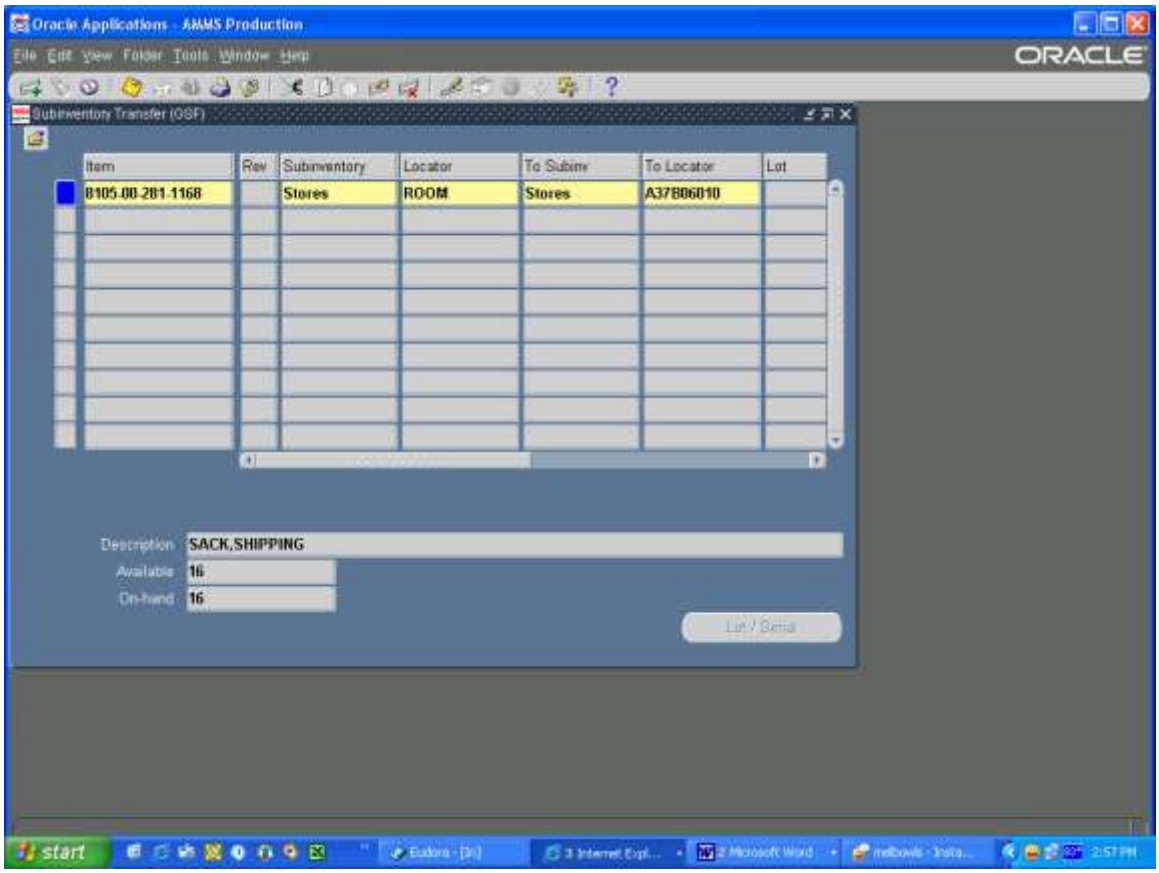
Step Description: Click on the Transaction Lines button

Expected Results: Sub Inventory Transfer window will open



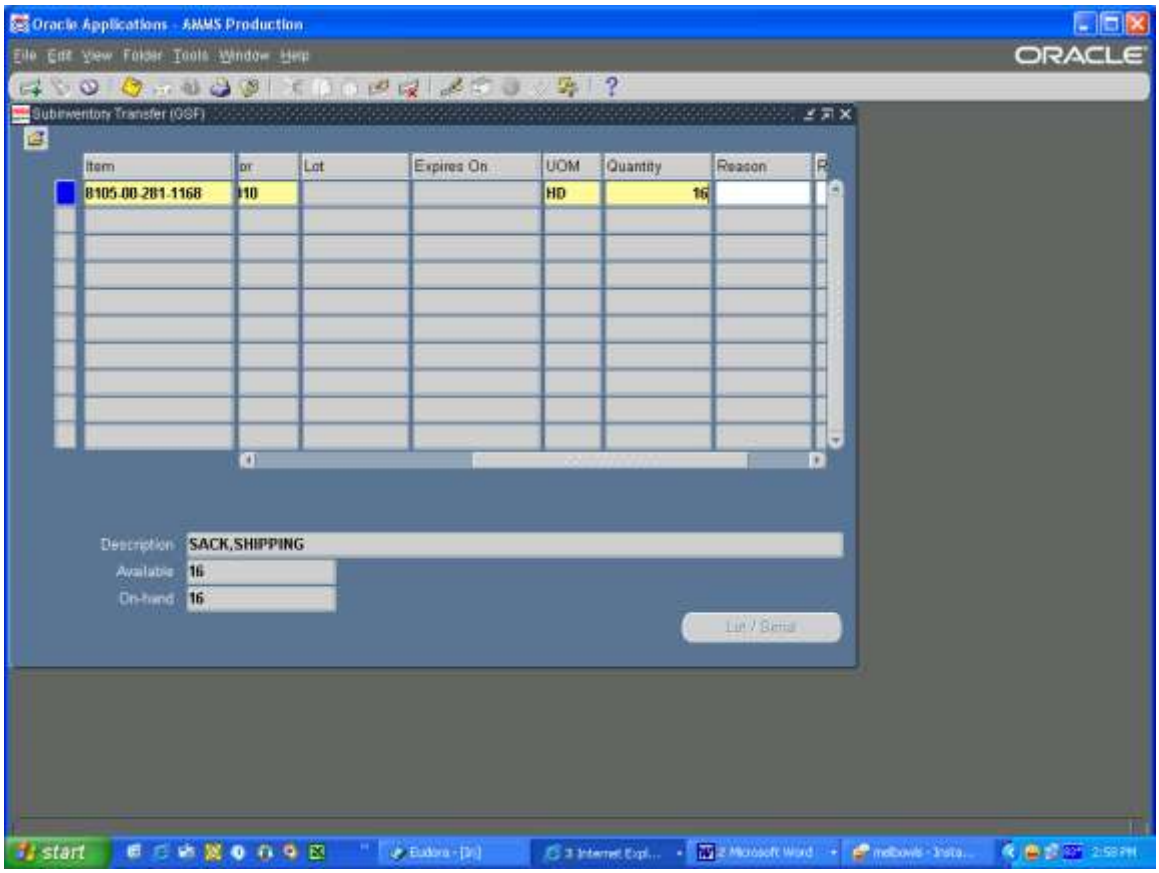
Step Description: Enter the information for the transfer: the item number, the sub inventory, the locator that the material was in, then enter the sub inventory again, and the locator that the material is now in.

Expected Results: Field will be populated



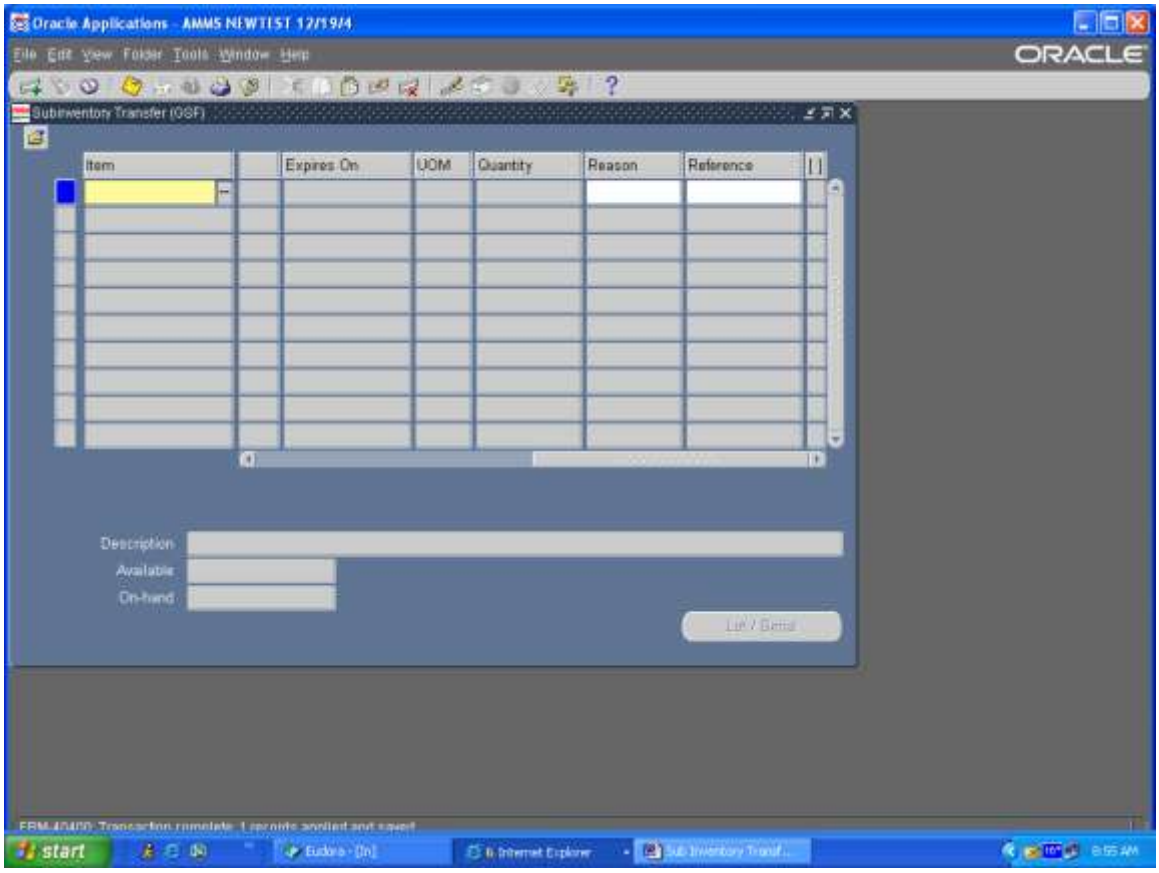
Step Description: You will see at the bottom of the screen Available and On Hand quantities. This is the only amount that can be transferred. You can not do a transfer for more than you have in the available box. If the material is going to multiple locators, then only do partial quantities.

Expected Results: Fields are populated



Step Description: Save your work:

Expected Results: Screen will go blank, Transactions complete message



NOTE: If you have an item that is being put in multiple locators then you need to do multiple transactions. Where ever the material is in the warehouse is where it needs to be identified in Oracle. Example, if you had 20 boxes in the ROOM, and moved them so that there are 10 boxes in 916A01010 and 10 boxes in 916B01010 then you have to do 2 separate transactions.

AMMS TRAINING SCRIPT

Updating Shelf Life Lot Numbers

Purpose

The purpose of this training script is to demonstrate how to update the expiration date on a shelf life item.

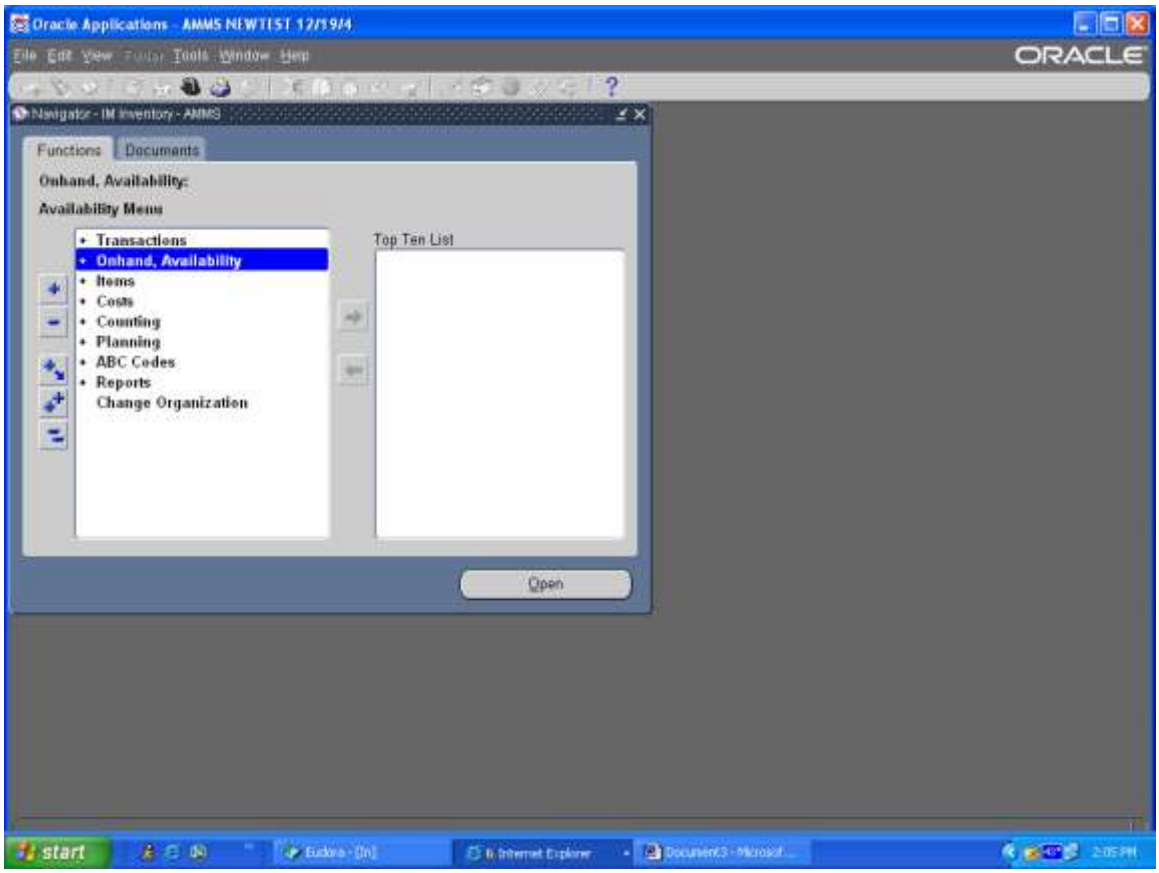
Audience

Warehousemen, Material Coordinators, and Team Leads

Prepared By	Theresa Coulson
Creation Date:	02/10/2005
Document Name	Update Shelf Life Lots and Expiration dates.doc
Version	2
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Inventory.	

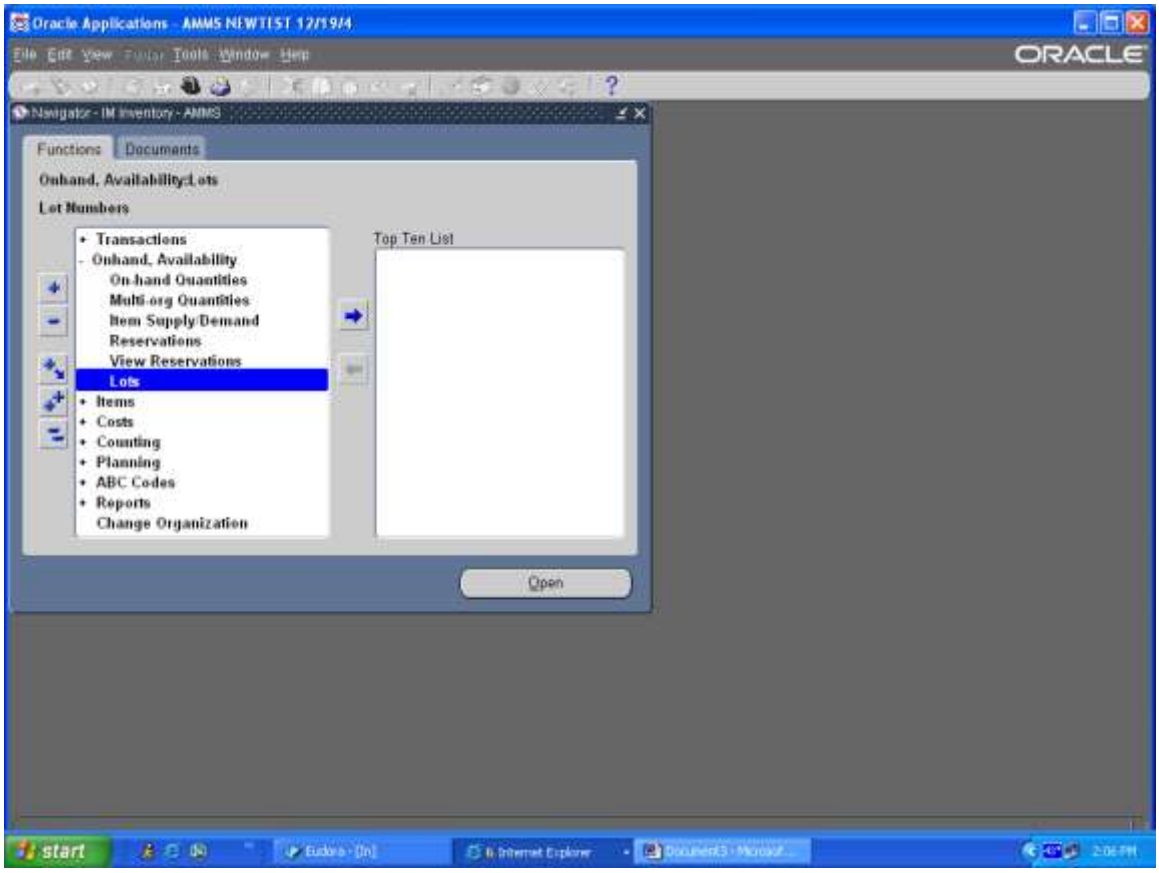
Step Description: Sign onto Oracle and select your Inventory responsibility.

Expected Results: You will be at the Inventory main menu.



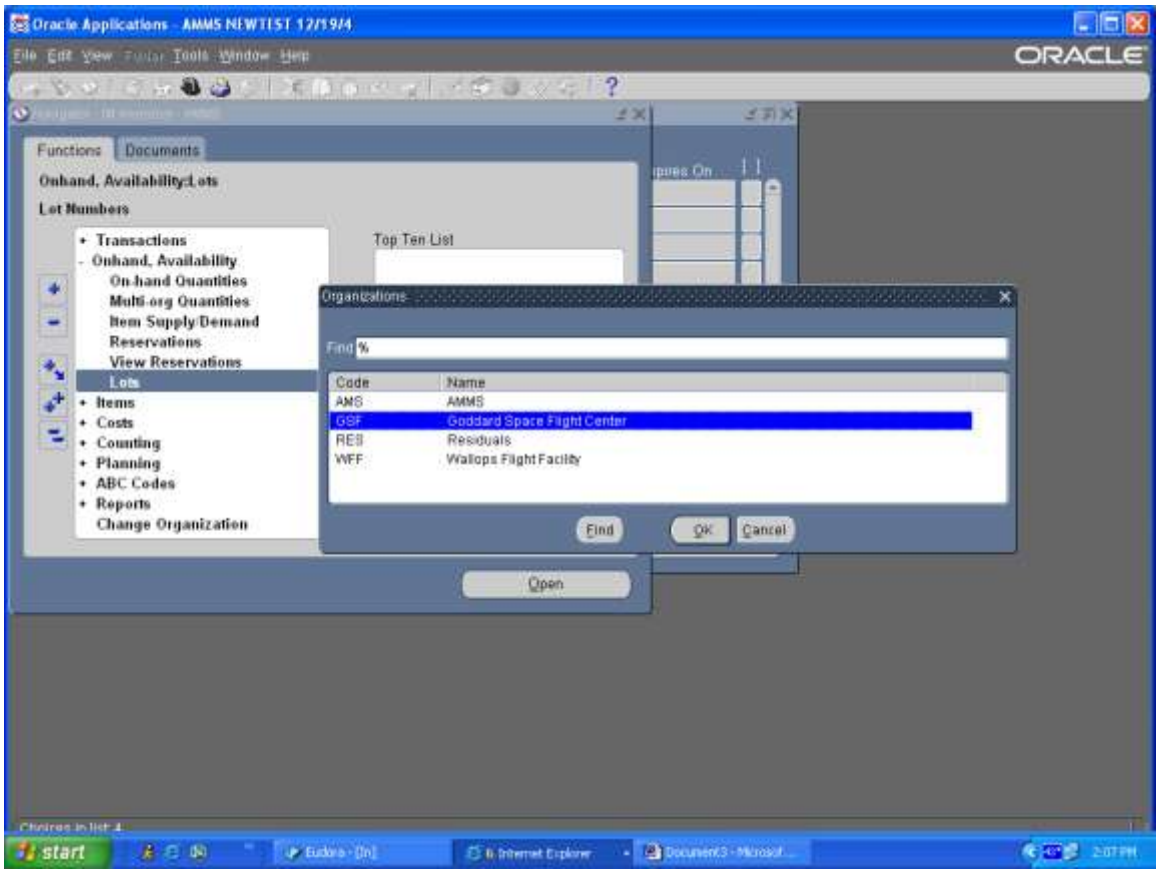
Step Description: From the Inventory main menu select On hand Availability > Lots, click on the Open button

Expected Results: Organization window will appear.



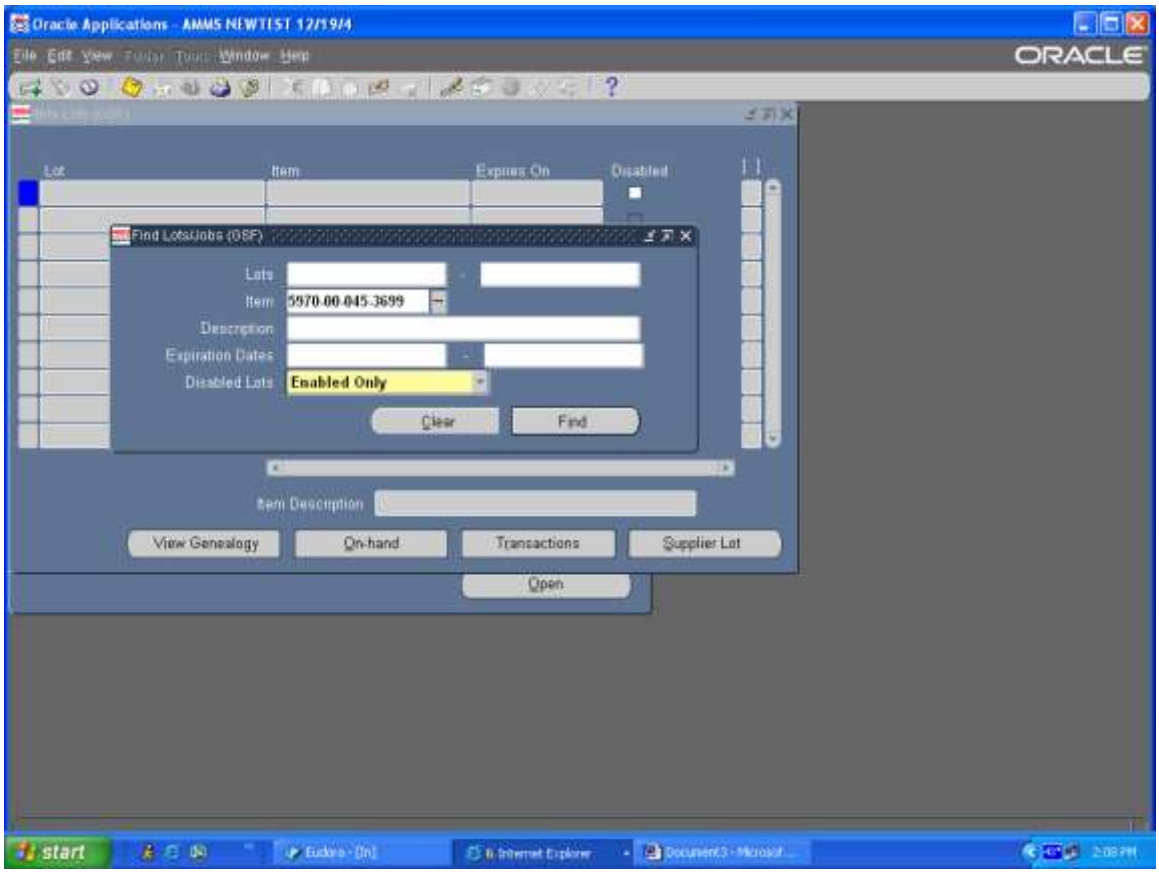
Step Description: Select the appropriate organization GSF for Goddard.

Expected Results: Find Lots/Job window will appear.



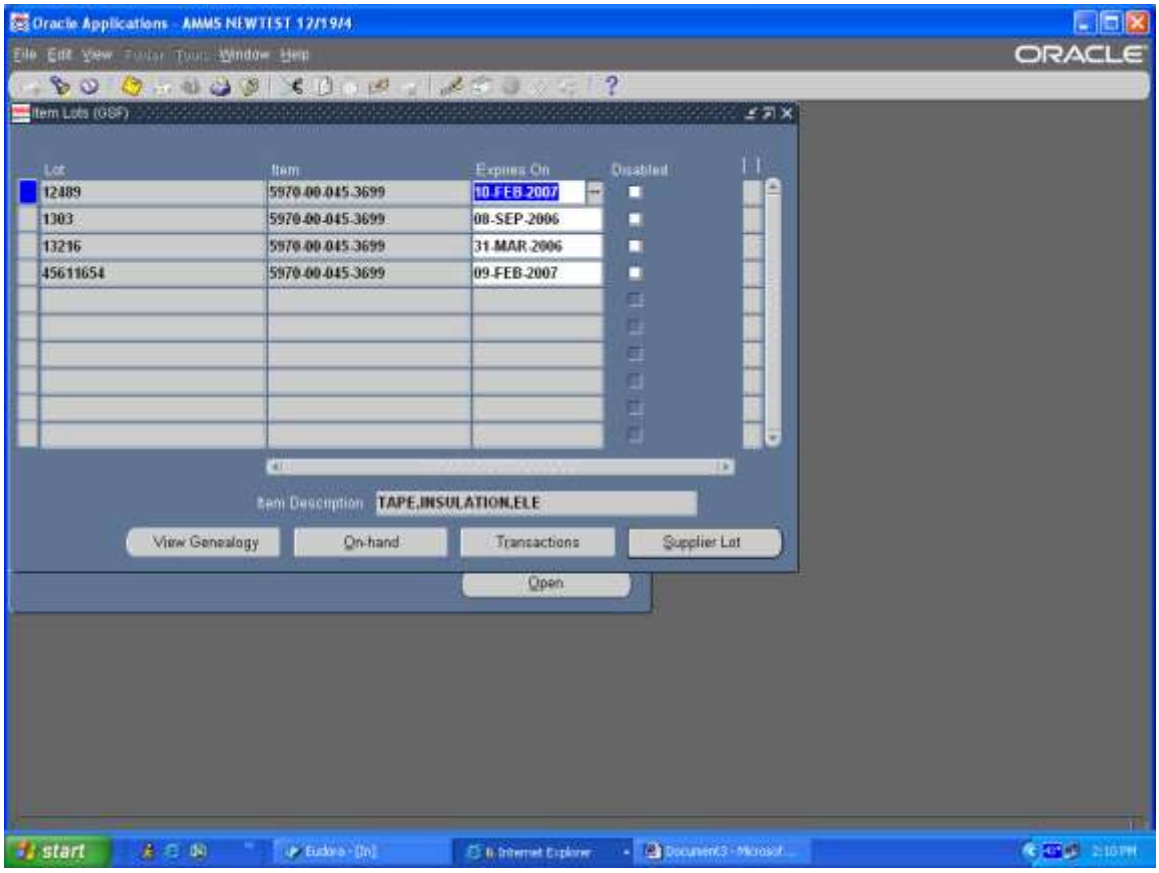
Step Description: Enter the item number in the Item field and click on the Find button.

Expected Results: Item Lot window will appear with information.



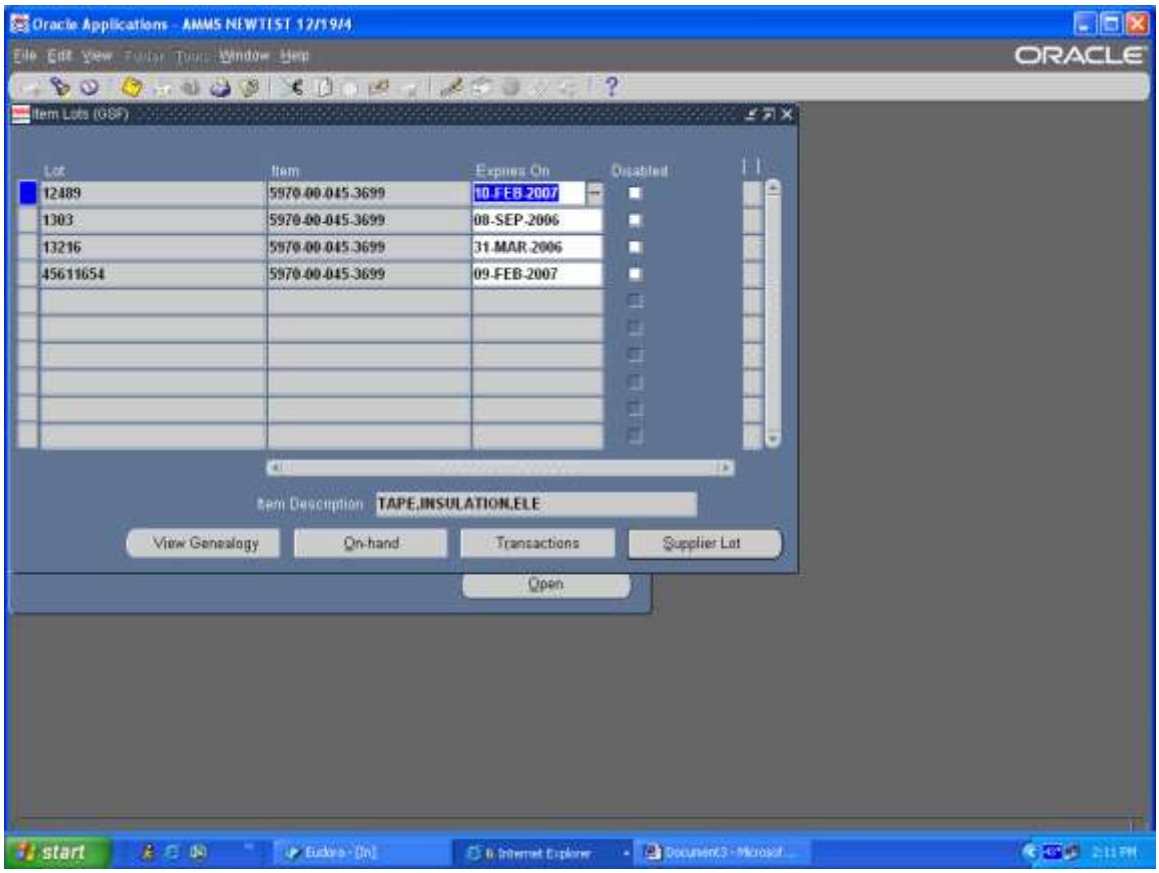
Step Description: Select the line that you want to update the expiration date, place the curser on that line.

Expected Results: You will be at the appropriate field.



Step Description: Click on the List of Values (LOV) in the Expires On field.

Expected Results: A Calendar will appear.

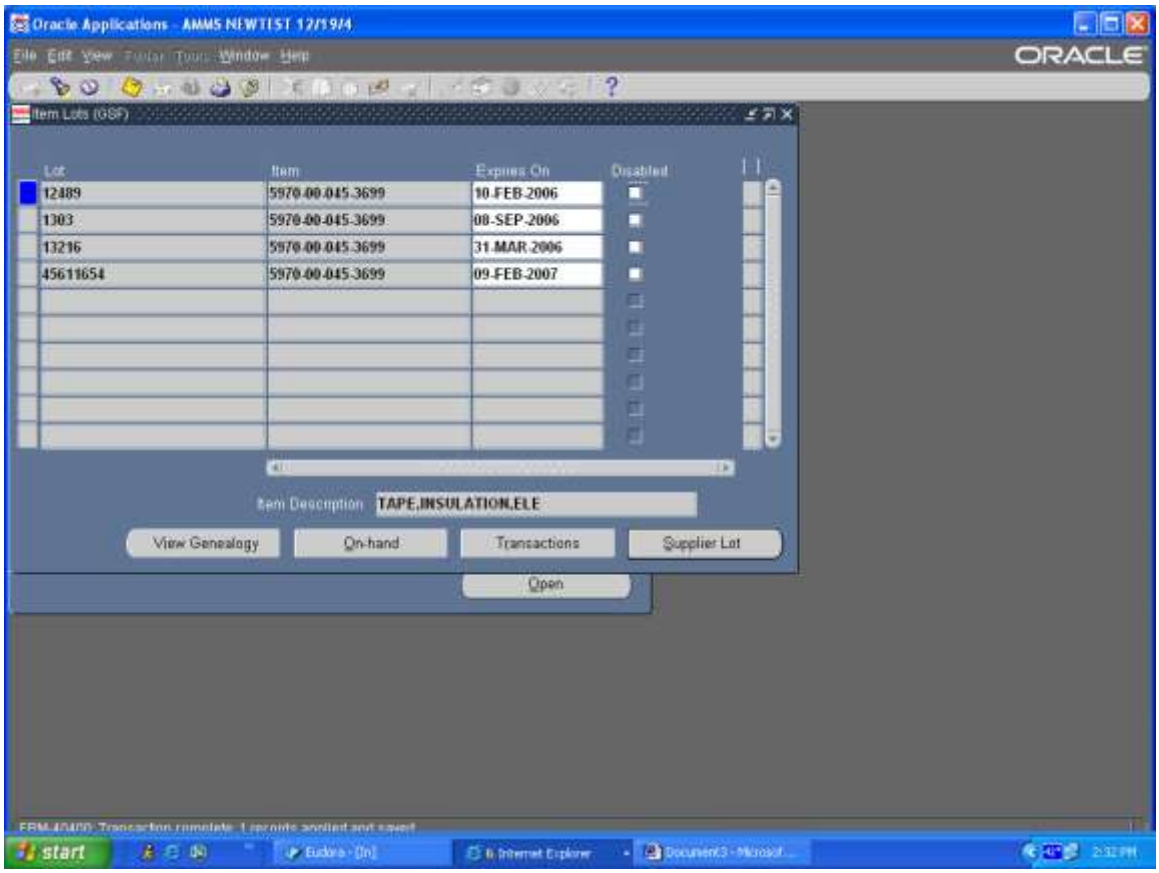


Step Description: Select the new expiration date, you can use the arrows to go back month or years. Once you have selected the new expiration date click the OK button.

Expected Results: Date in Expires On field will update.

Step Description: Save your work.

Expected Results: Transaction Saved and Applied message.



Note: You should make the expiration date the same as the expiration date from the manufacture.

AMMS TRAINING SCRIPT

View On Hand Qty

Purpose

The purpose of this training script is to walk you though looking to see if an item has an available on hand quantity.

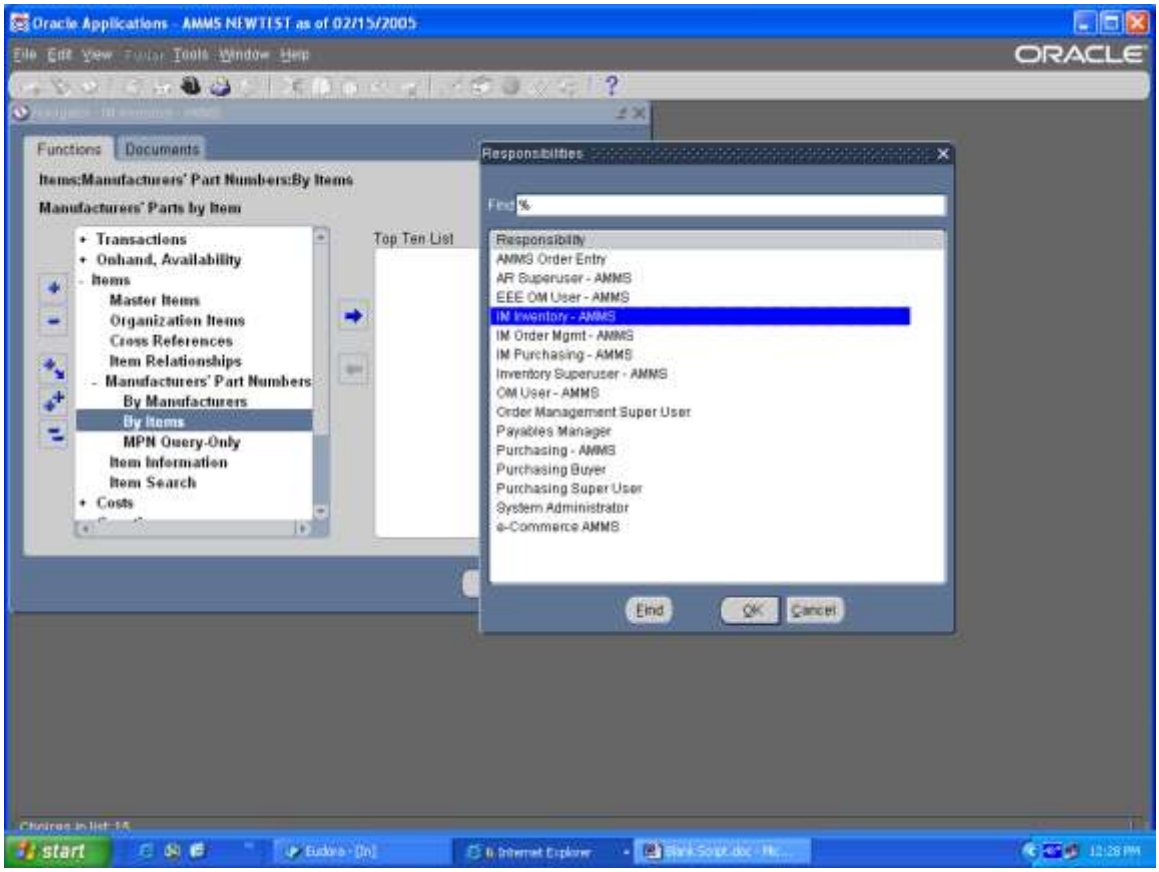
Audience

Material Coordinators and Supply Team Lead

Prepared By	Theresa Coulson
Creation Date:	03/28/2005
Document Name	View On Hand Qty.doc
Version	2
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Inventory.	

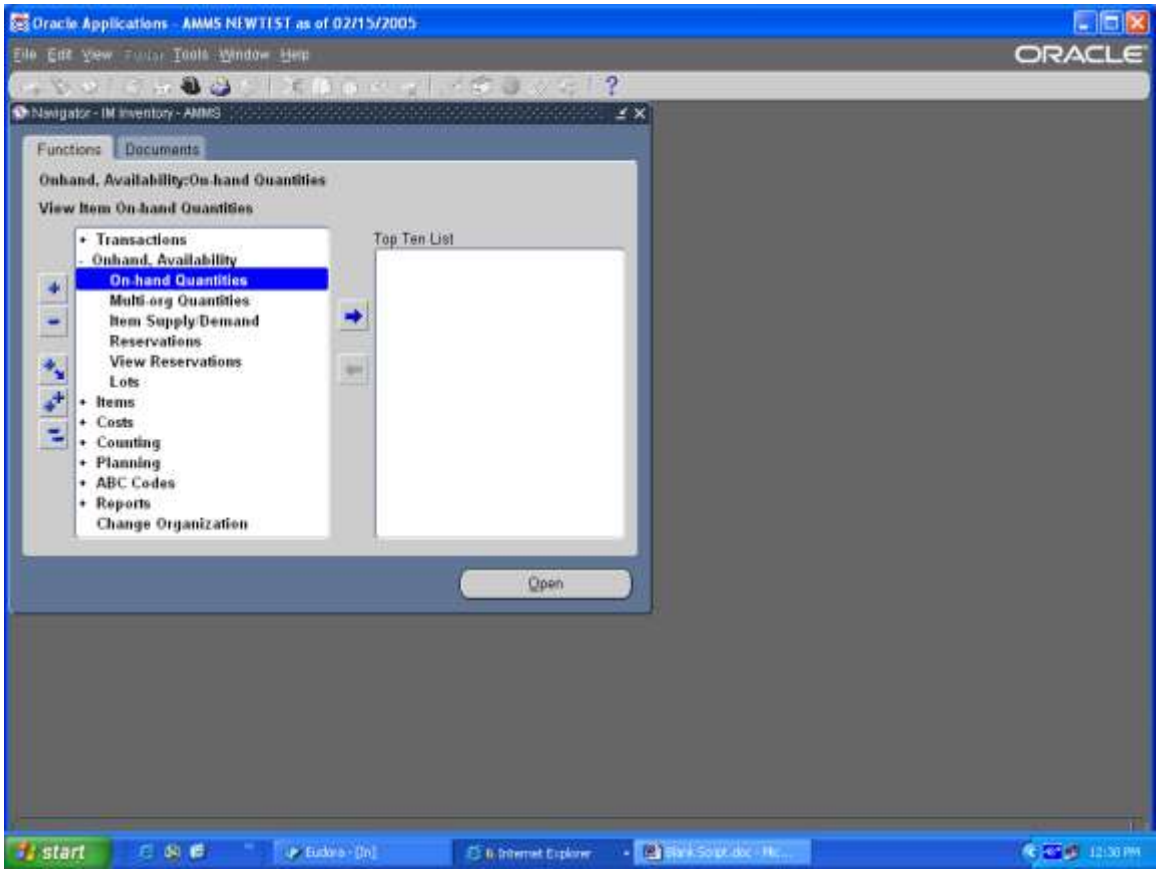
Step Description: Sign onto Oracle and select your IM Inventory AMMS responsibility

Expected Results: IM Inventory main menu will appear



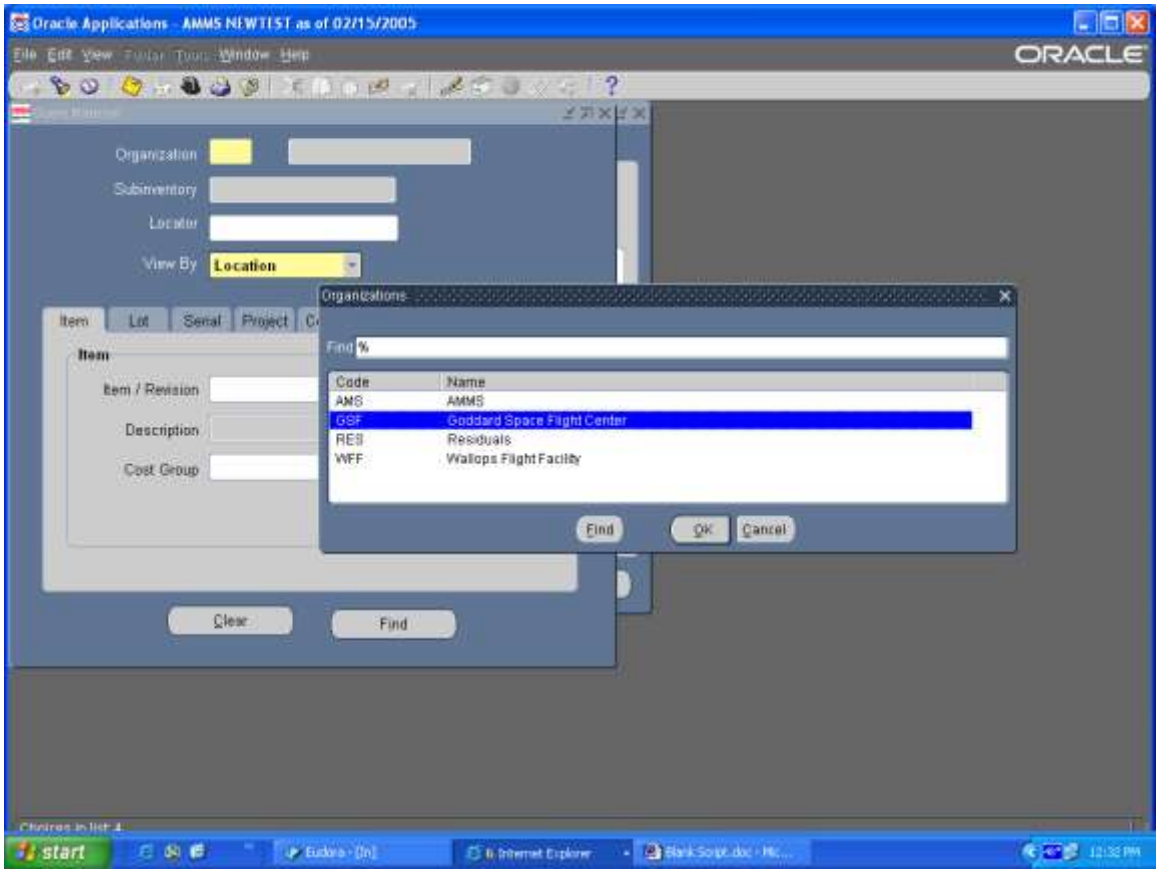
Step Description: From the IM Inventory AMMS main menu select On Hand Availability, On-Hand Quantities, click on the open button

Expected Results: Organization window will appear



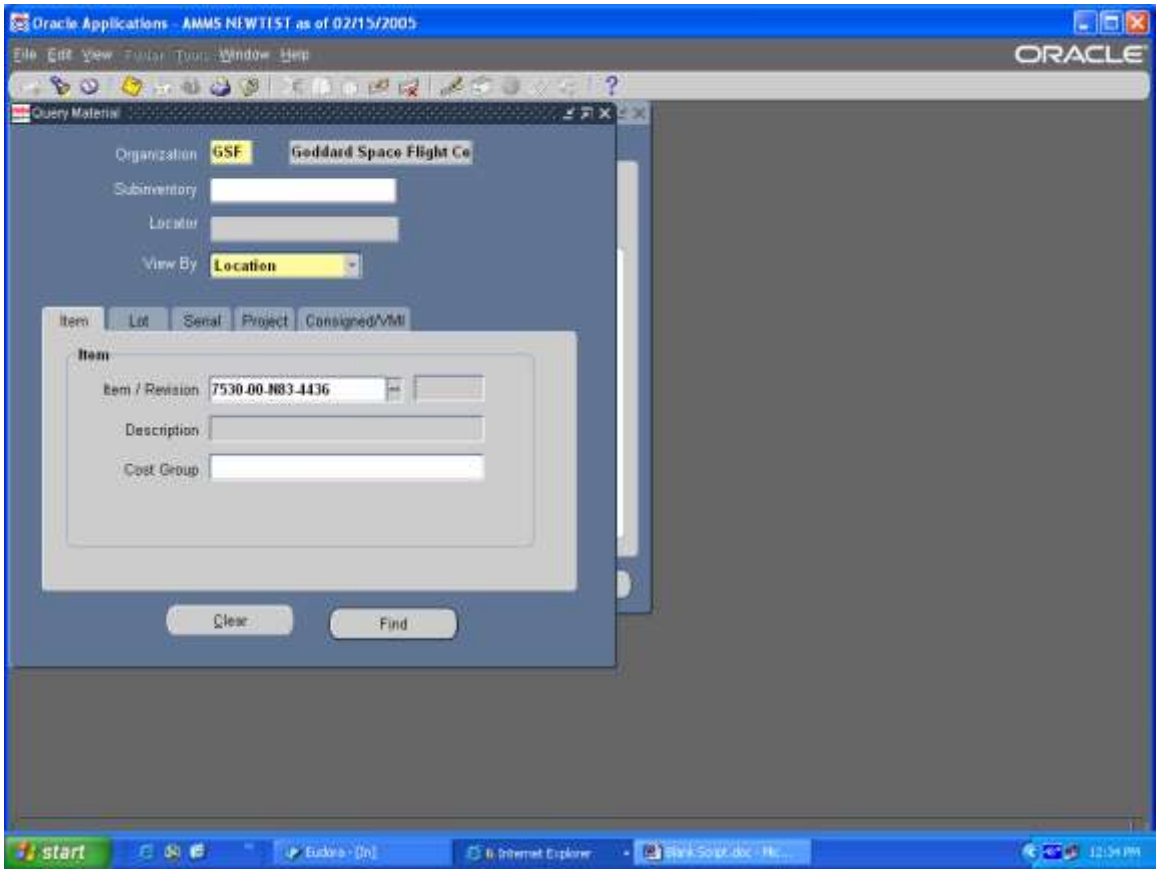
Step Description: At the Organization window select the appropriate organization, GSF if Goddard and WFF is Wallops, click OK

Expected Results: Query Material window will appear



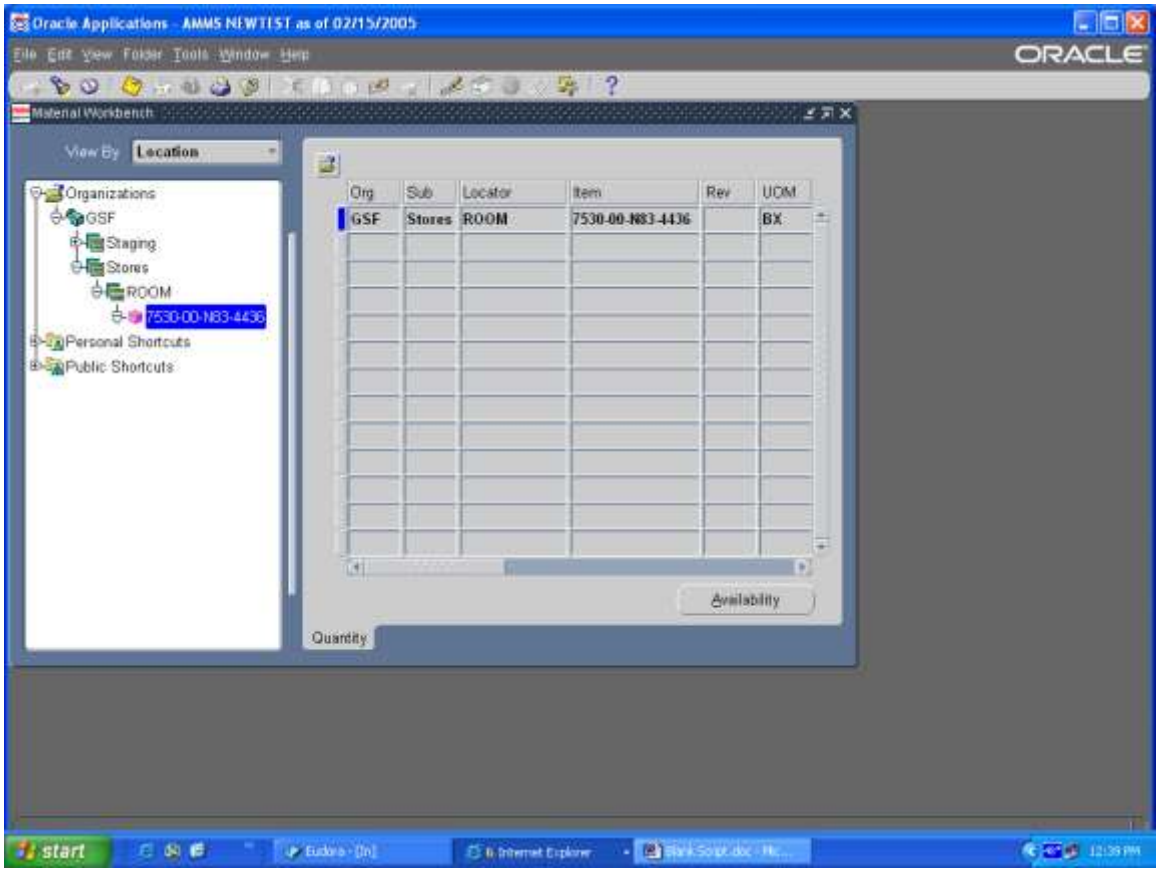
Step Description: In the Item/Revision field enter your Item Number, click on the Find button

Expected Result: Material Workbench window will appear



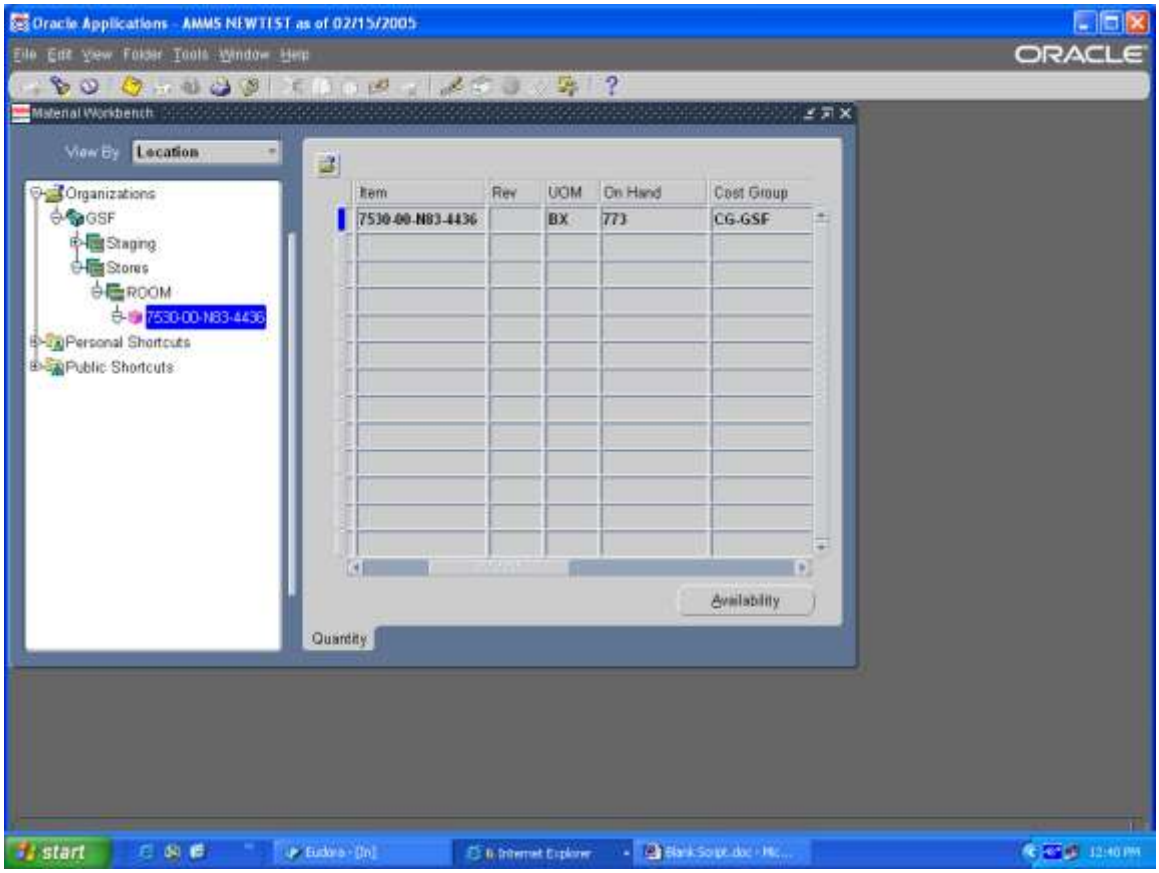
Step Description: At the left hand section of the screen, at Organizations, single click on the + sign, this will open up the organization GSF, single click on the + sign next to GSF, this will open the sub inventories that have a balance associated, single click on the + sign next to the main sub inventory, this will bring up the locators, single click on the + sign next to the locator, this will display the item number, click on the Item Number and all of the field in the window will be populated.

Expected Results: Window will populate with data



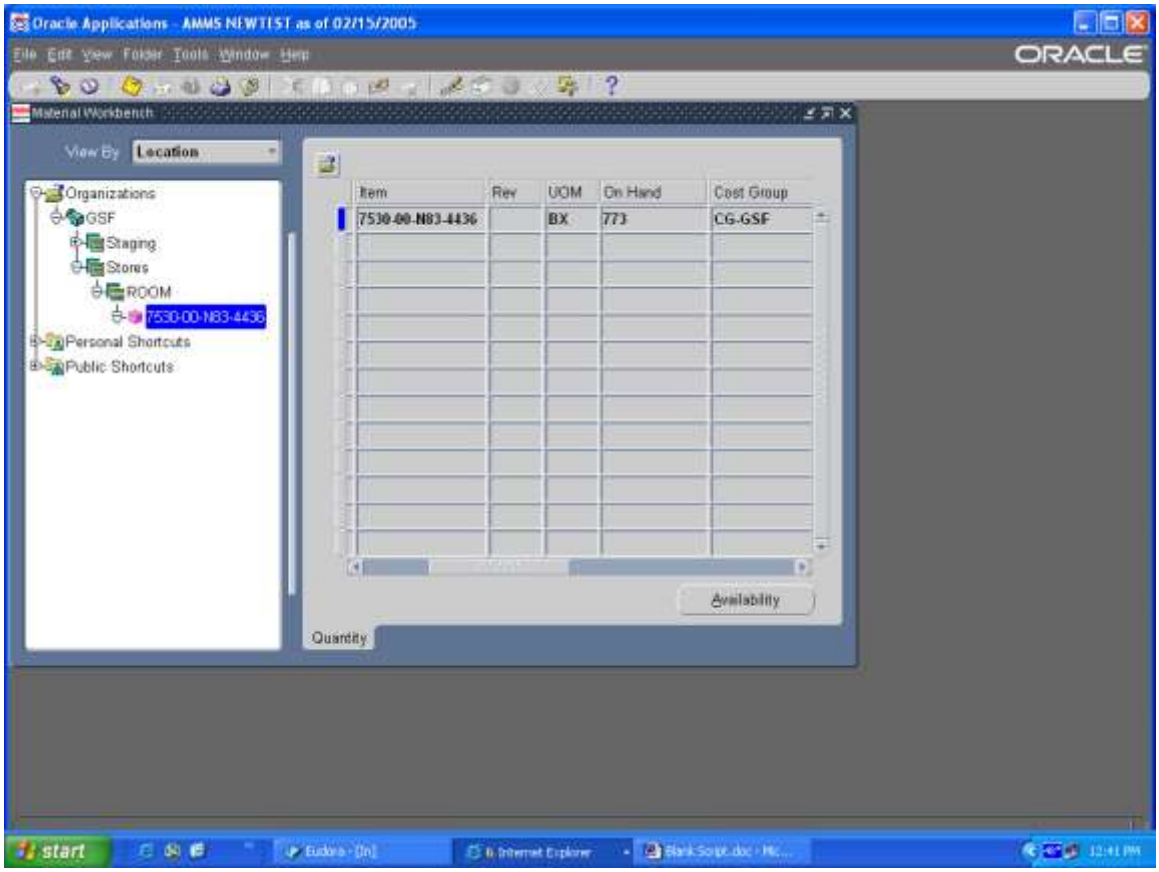
Step Description: Use the scroll bar at the bottom of the screen to see the quantity on hand.

Expected Results: Window view will change



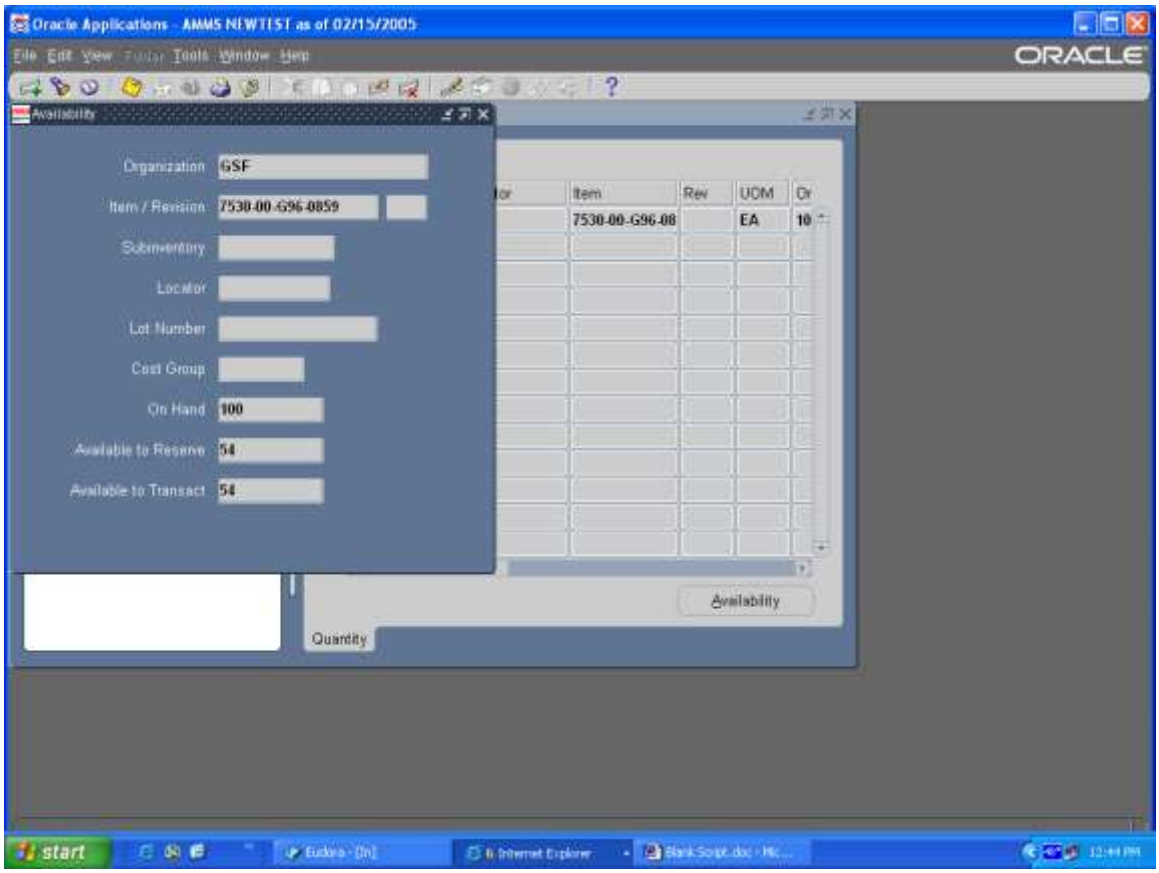
Step Description: Click on the Availability button at the bottom right of the screen

Expected Results: Availability window will open



Step Description: This window will tell you, Organization, Item Number, Sub Inventory, Locator, Lot Number (if applicable), Cost Group, On Hand, Available to Reserve, Available to Transact.

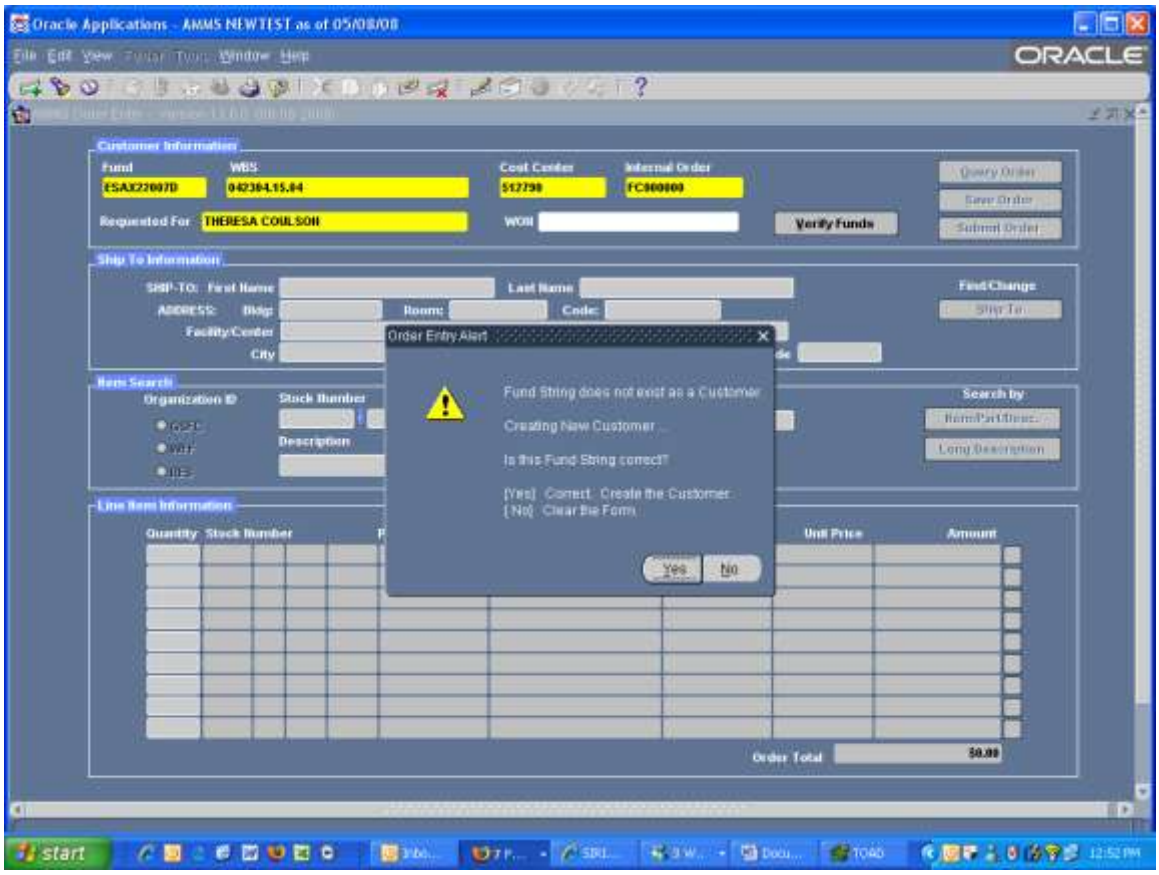
Expected Results: Window will have data



AMMS MISCELLANEOUS TRAINING SCRIPTS

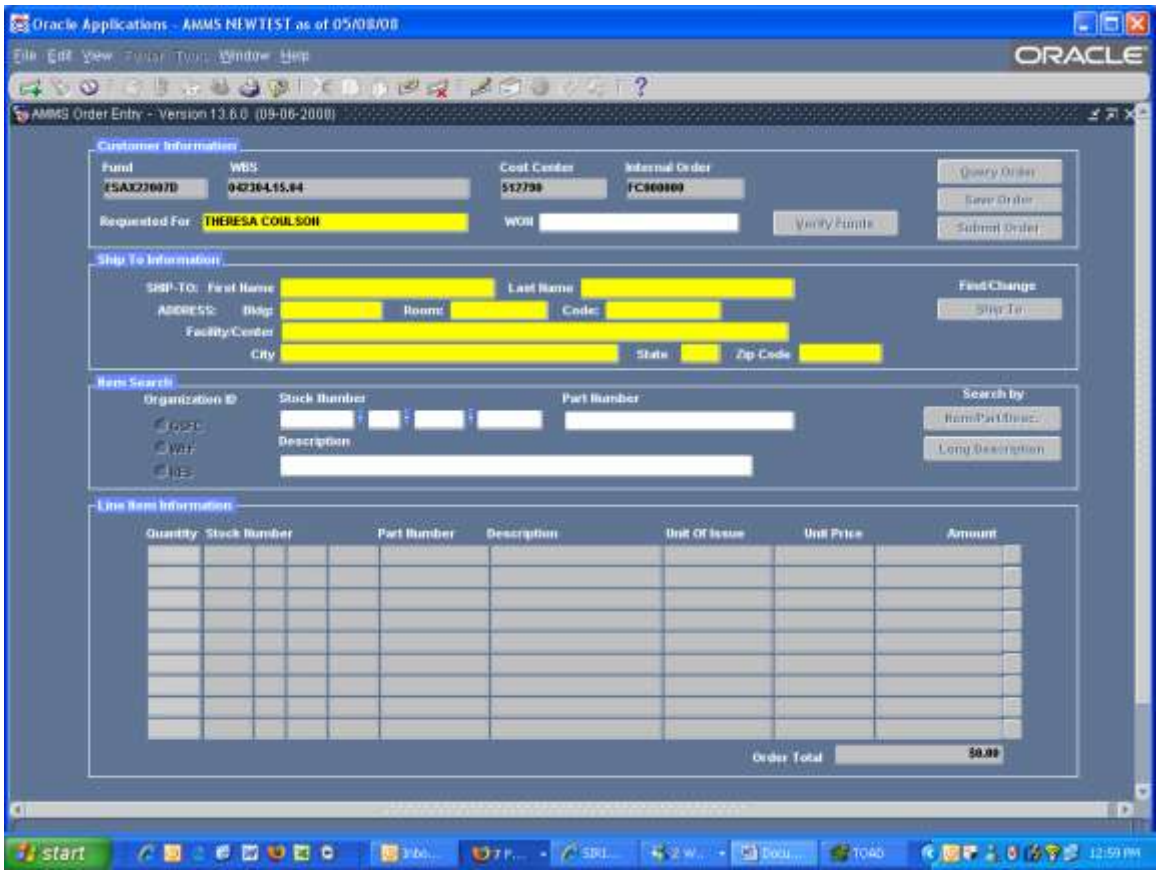
How to add a new Ship To address in AMMS:

When using the financial string in AMMS for the first time you will receive this message



Please verify that you entered all of the correct funding information, click Yes if all the information is correct.

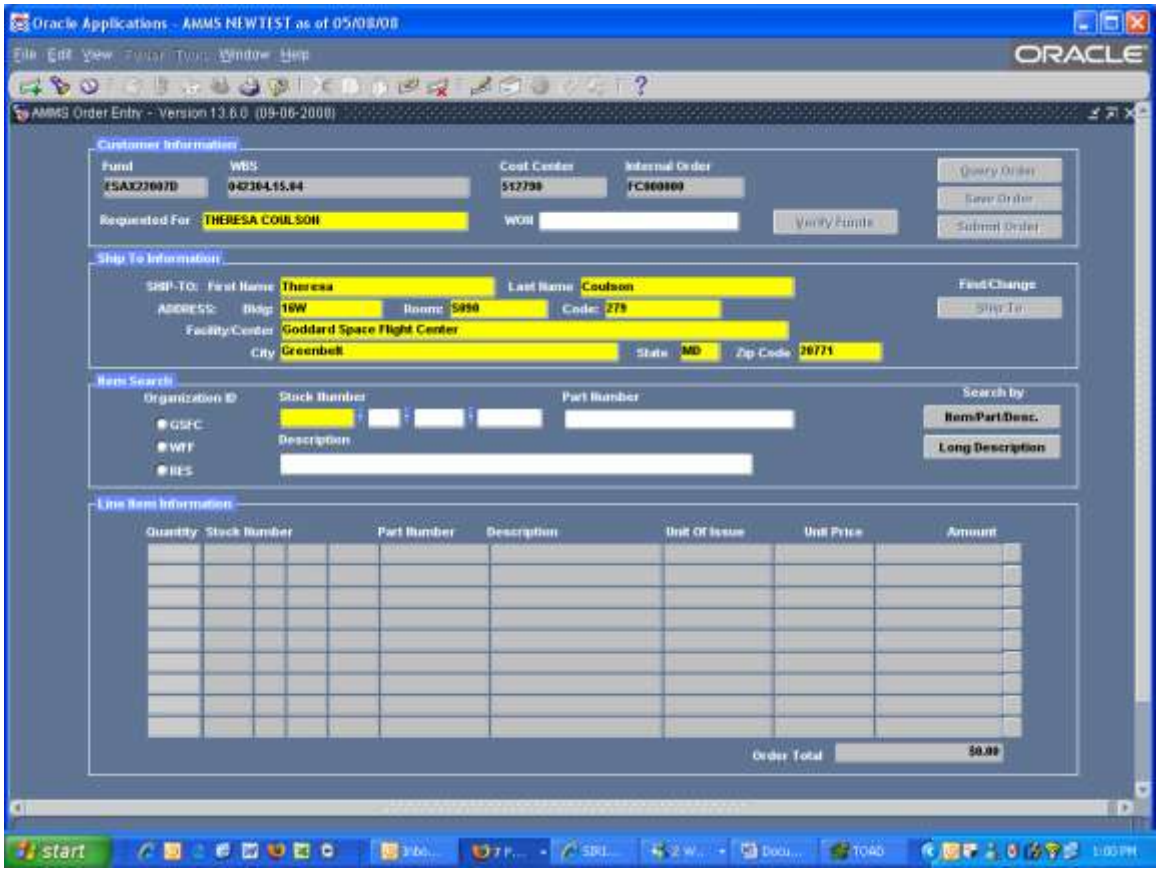
The Ship To fields will be blank, enter your shipping information;



Enter the following **Ship to** Information.

- First Name – Enter your first name in this field
- Last Name – Enter your last name in this field
- Bldg – Enter you building number in this field
- Room – Enter your room number in this field
- Code – Enter your Code in this field
- Facility/Center – Enter you facility in this field
- City - Enter your city
- State – Enter your State
- Zip Code – Enter your five-digit Zip Code in this field

Ship To address entered,



You can now proceed with entering your items.

AMMS TRAINING SCRIPT
Printing AMMS Orders

Purpose

The purpose of this training script is to explain how AMMS users can use the PRINT function to create a PDF copy of their order.

Audience

AMMS Users

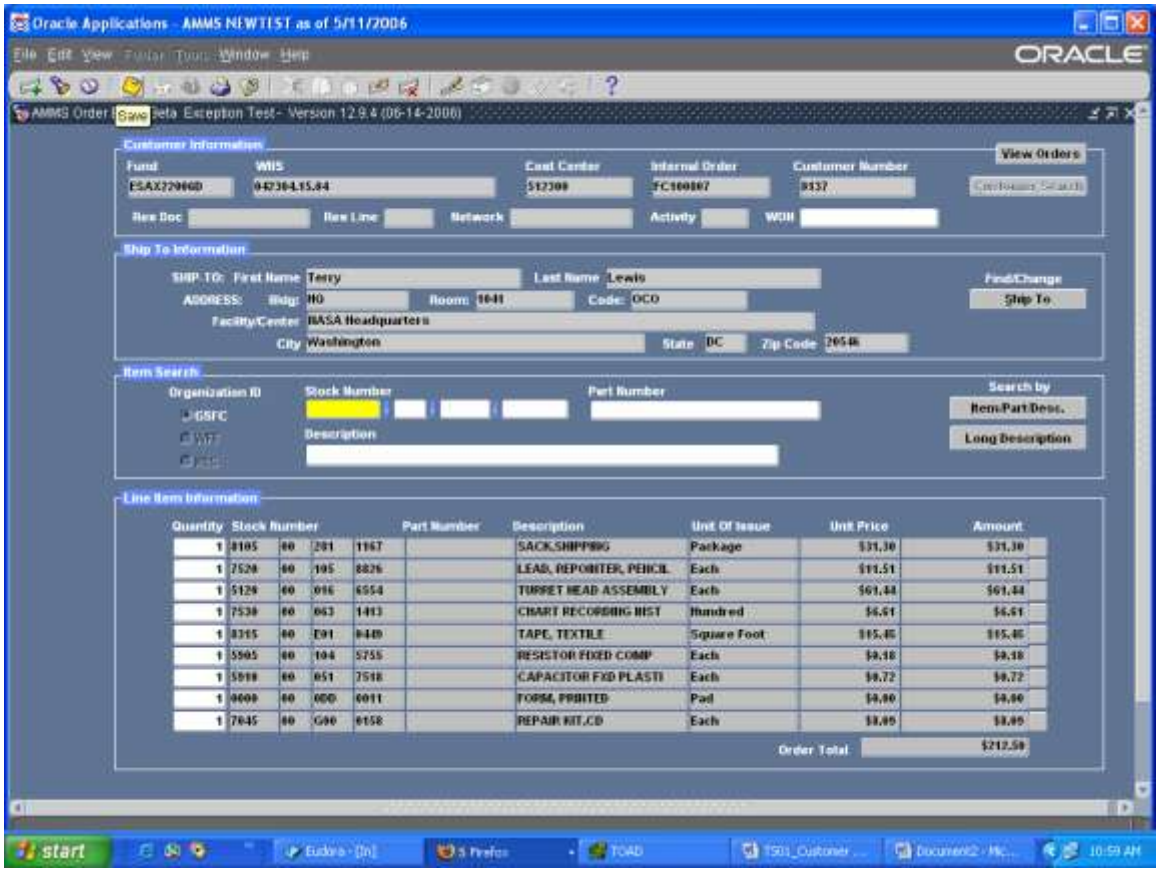
Prepared By	Theresa Coulson
Creation Date:	06/26/2006
Document Name	Printing AMMS Orders.doc
Version	2
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Misc\.	

System Requirements:

1. To print AMMS orders, you must have Adobe Acrobat Reader 6.0 or later installed on your workstation. This will allow you to view you printed order, print the order or save the order to your workstation for future reference or printing.

Saving Your Order

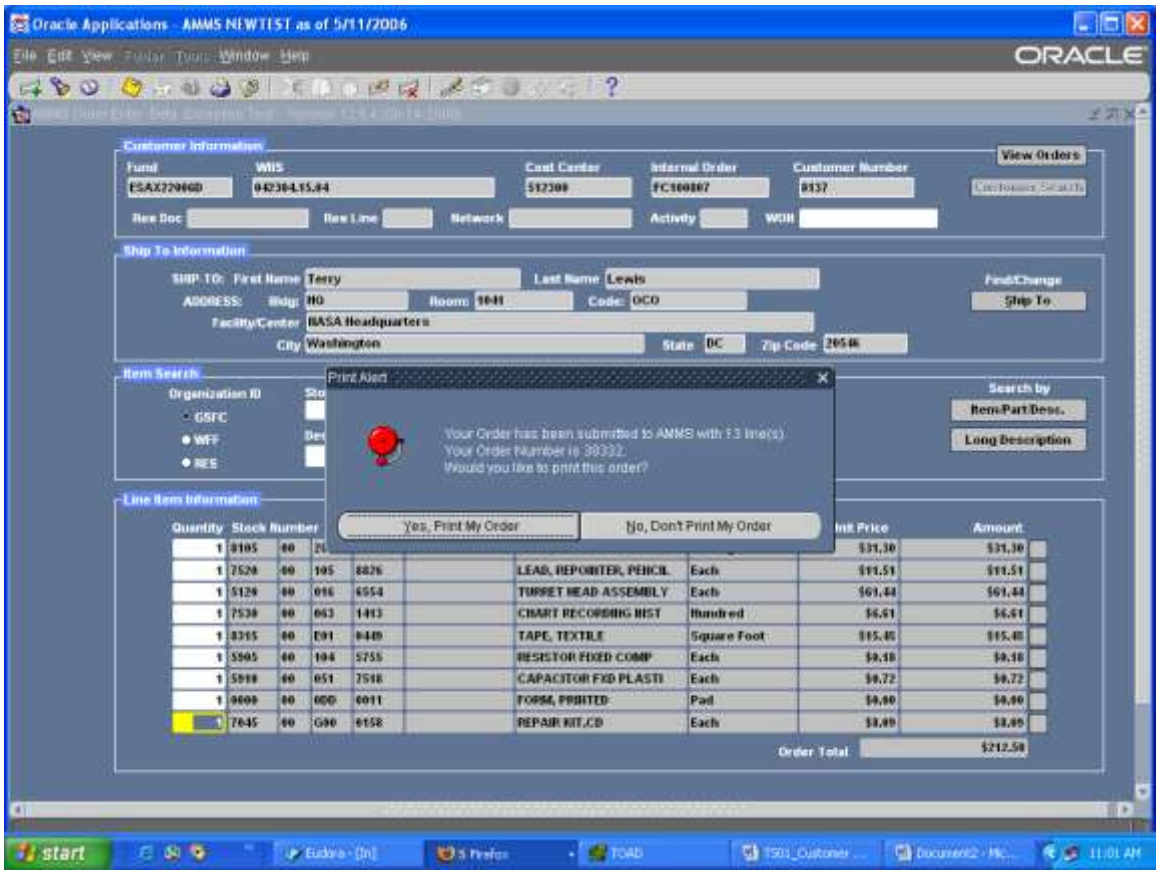
1. Once you have entered all of your lines on the order click on the Yellow Diskette on the tool bar, this is the **Save** button. This will save your order, give you an order number and ask if you would like to print your order.



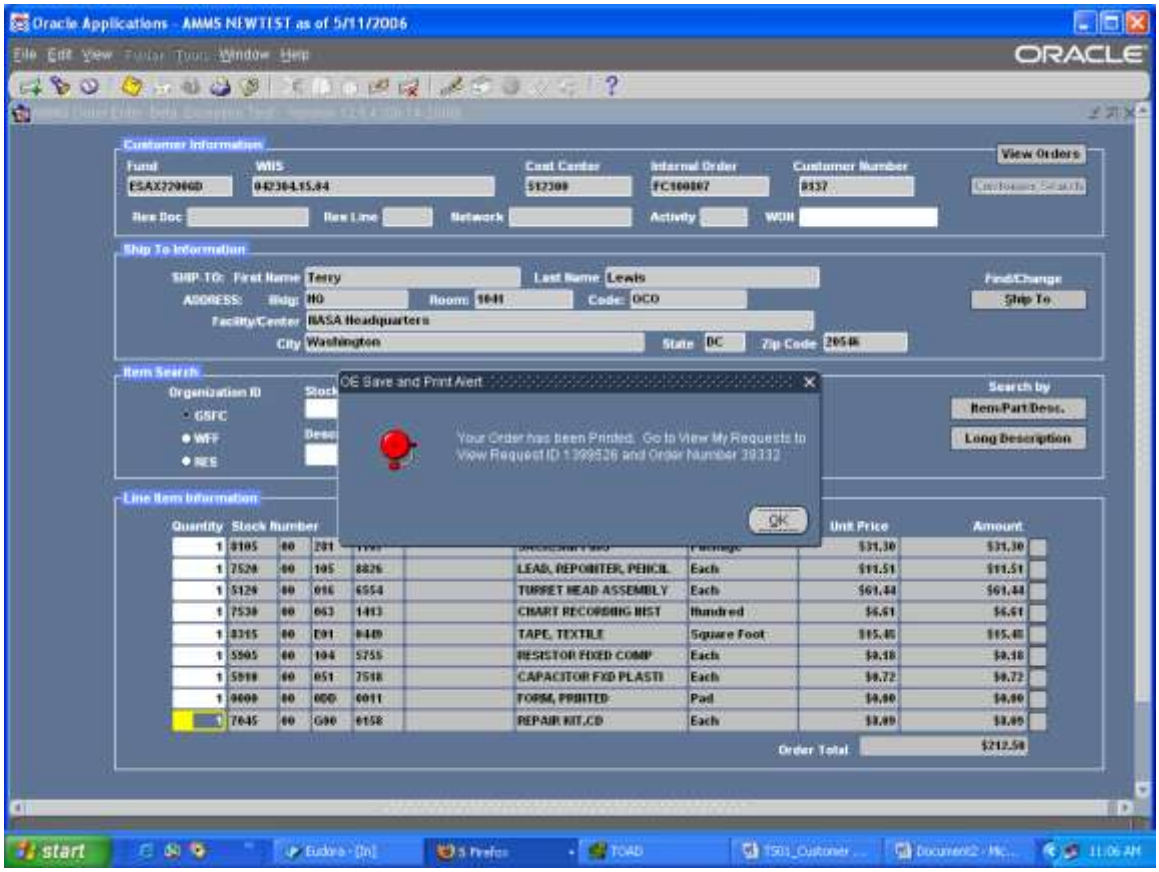
2. You will receive an OE Print Alert window, telling you your order has been submitted to AMMS, the number of line items, your Order Number, and asking “Would you like to print this order?”

   A. If you click “Yes, Print my Order”, you will receive another OE Alert

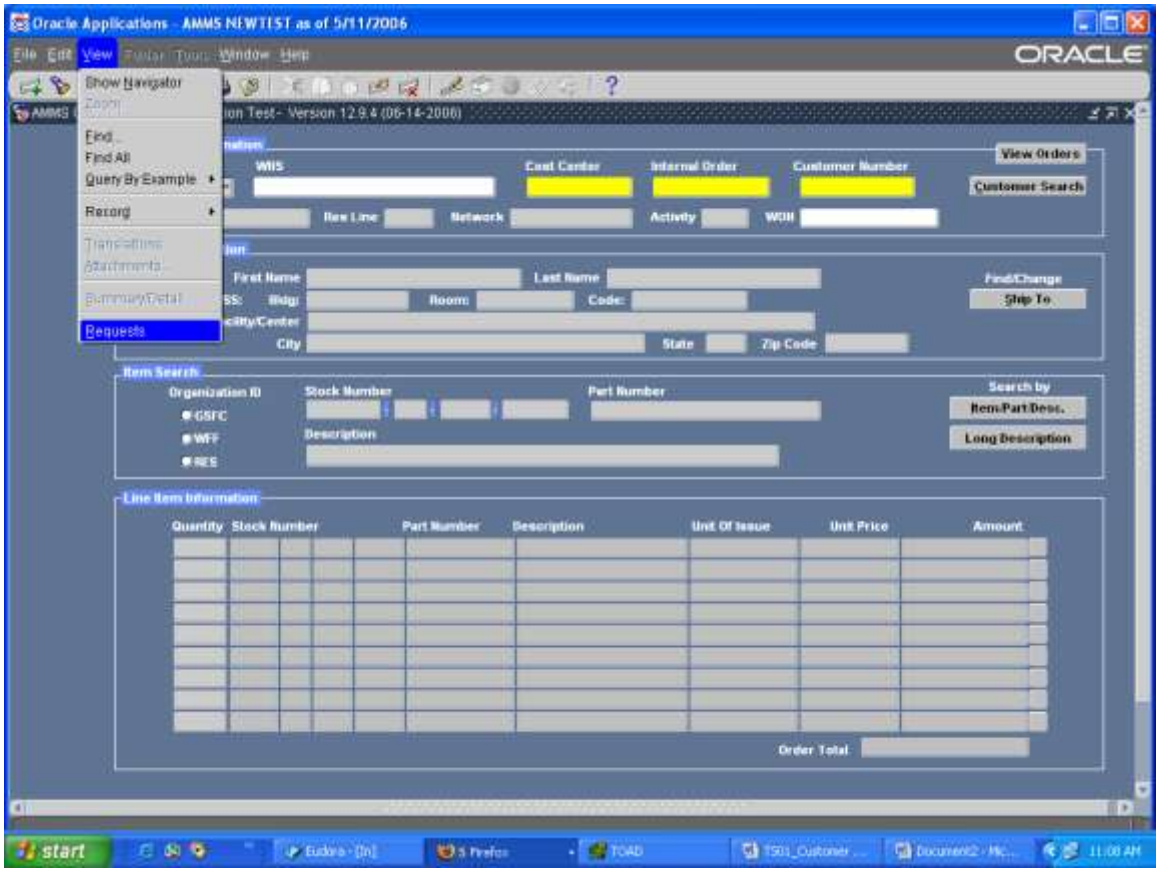
   B. If you click “No, Don’t Print my Order”, you order will still be submitted for processing but not be printed. You will have to contact the AMMS Help Desk at 6-2525 to print your order.



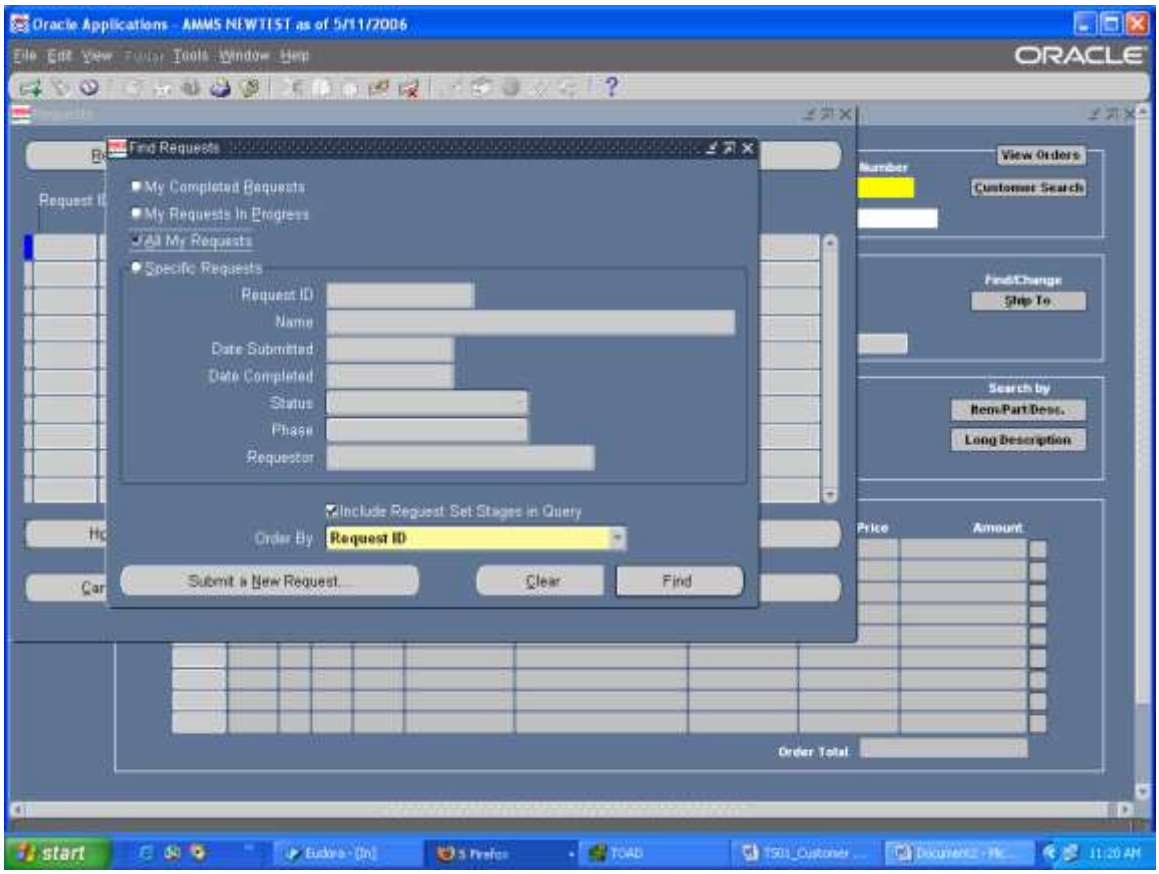
3. If you click “Yes, Print my Order” you will receive an OE Save and Print Alert, telling you your order has been printed, and to go to View My Requests to view your order.



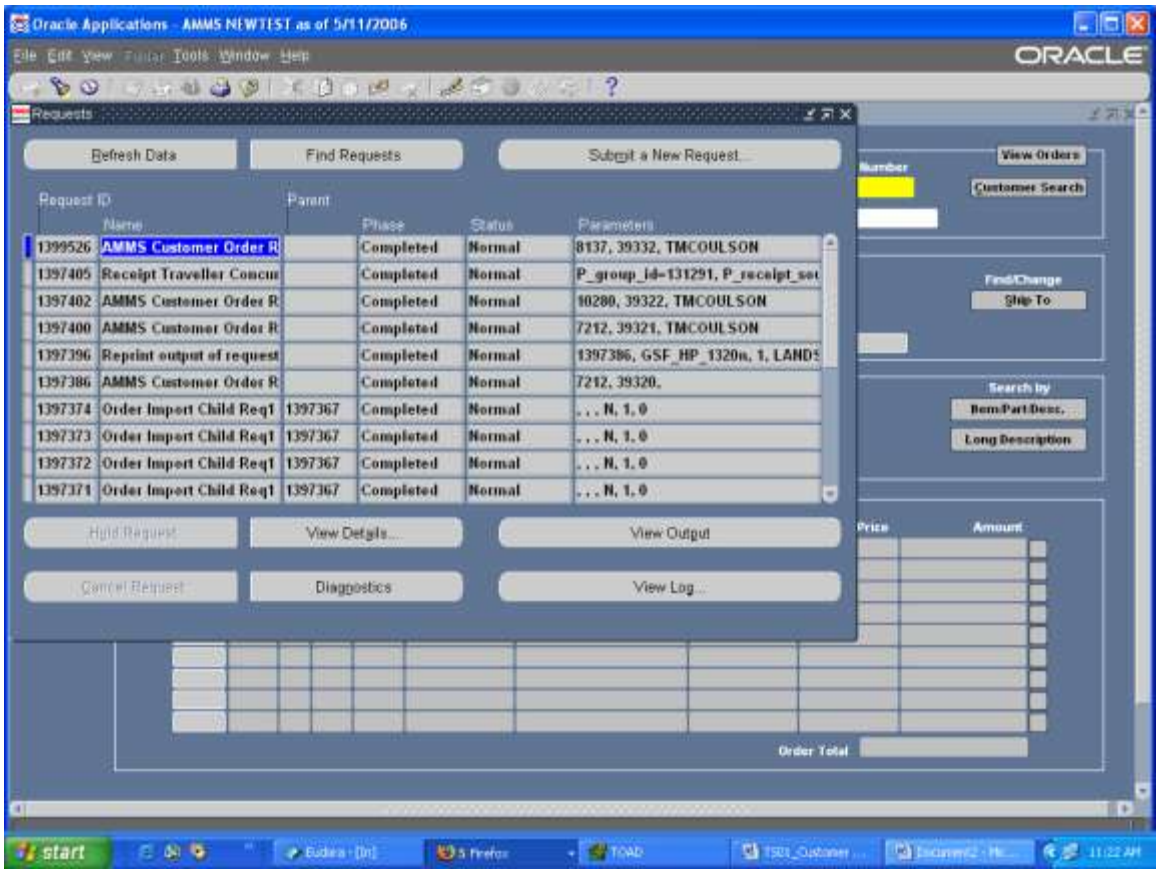
4. Click OK to the OE Save and Print Alert, the form will go blank. From the Toolbar select View, then select Requests



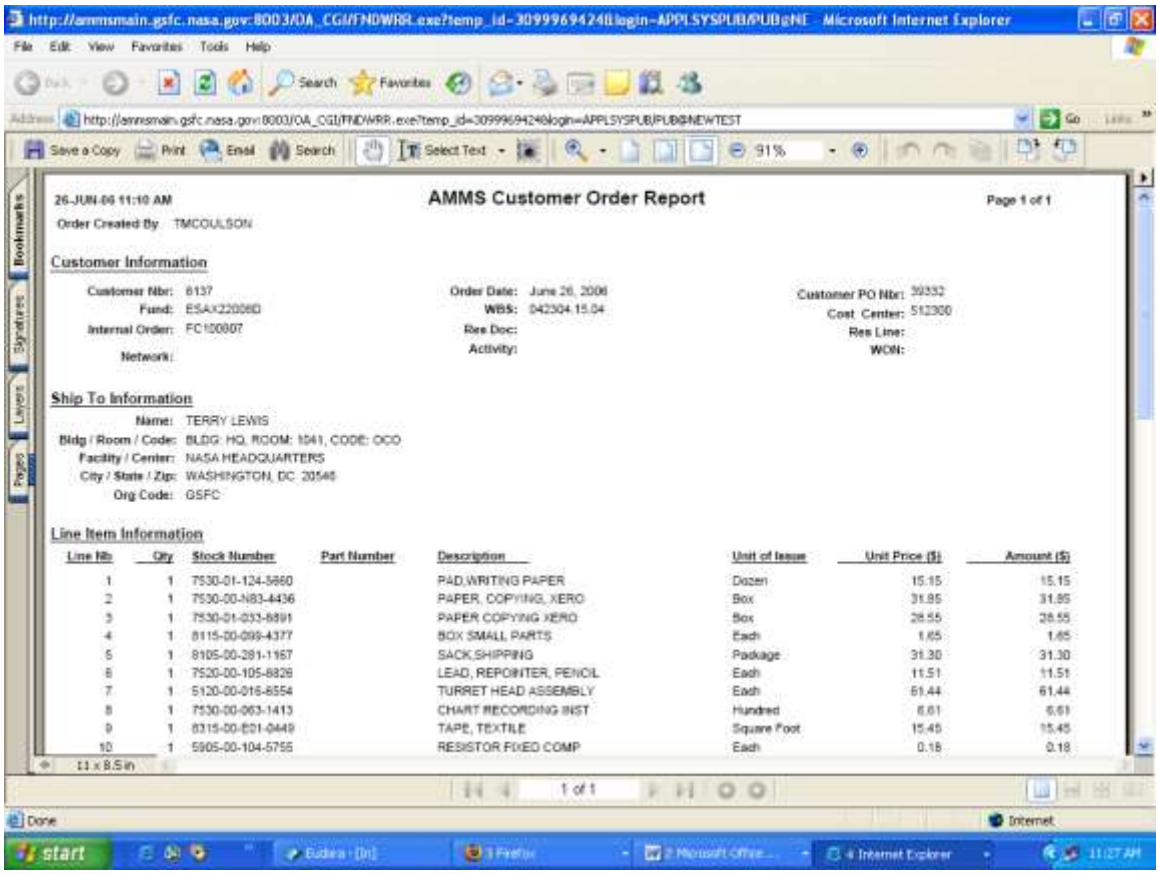
5. The Find Requests window will appear, make sure the “All My Requests” is selected, click on the Find Button



6. You are looking for the AMMS Customer Order Report. To the right on each line, you will see your Customer Number, AMMS Number and your name. Make sure that the line indicator is on the line you want to print, if not, click on the order you want to print, click on the View Output button



7. Adobe Acrobat will open with the AMMS Customer Order Report for the selected order.



26-JUN-06 11:10 AM

Order Created By: TMCOULSON

AMMS Customer Order Report

Page 1 of 1

Customer Information

Customer Nbr: 6137
Fund: ESAX22006D
Internal Order: FC100807
Network:

Order Date: June 26, 2006
WBS: 042304.15.04
Res Doc:
Activity:

Customer PO Nbr: 39332
Cost Center: 512300
Res Line:
WDN:

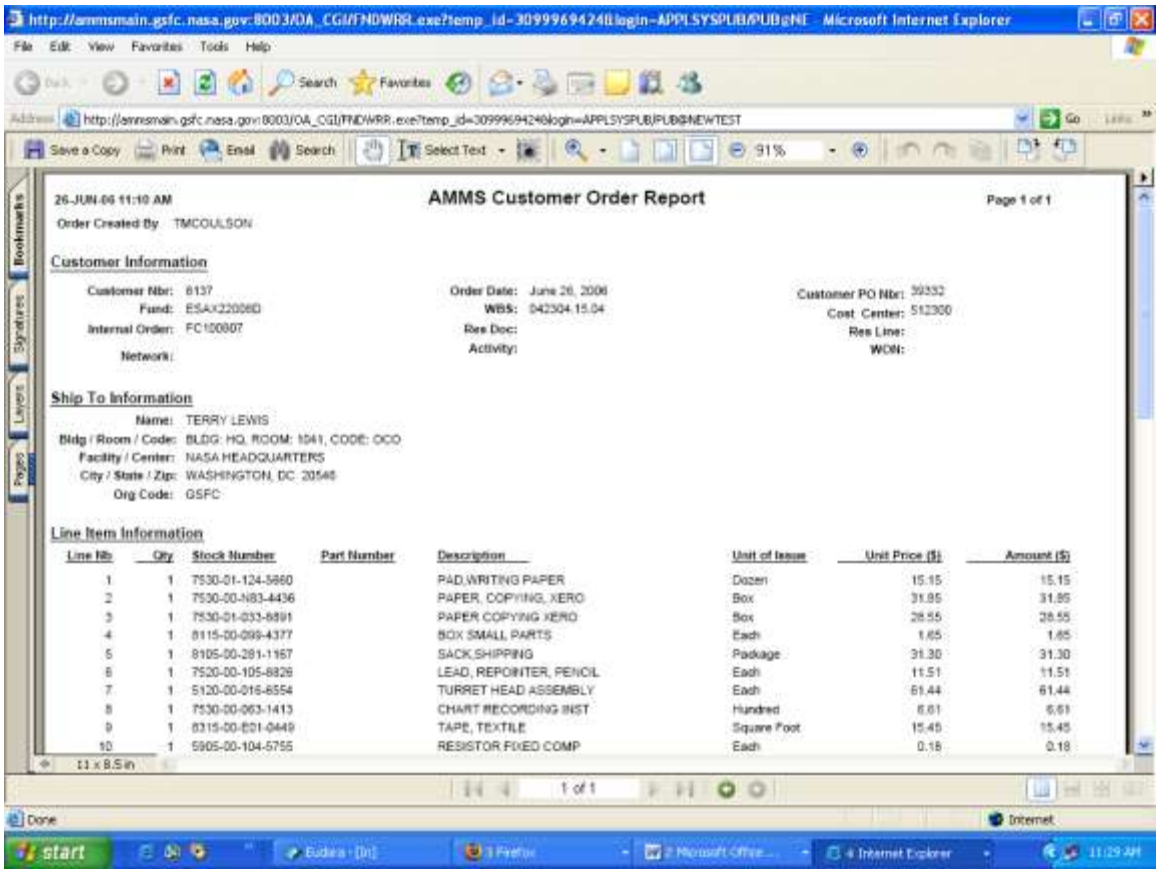
Ship To Information

Name: TERRY LEWIS
Bldg / Room / Code: BLDG: HQ, ROOM: 1041, CODE: OCO
Facility / Center: NASA HEADQUARTERS
City / State / Zip: WASHINGTON, DC 20546
Org Code: GSFC

Line Item Information

Line Nb	Qty	Stock Number	Part Number	Description	Unit of Issue	Unit Price ($)	Amount ($)
1	1	7530-01-124-5860		PAD,WRITING PAPER	Dozen	15.15	15.15
2	1	7530-00-N83-4436		PAPER, COPYING, XERO	Box	31.85	31.85
3	1	7530-01-033-8891		PAPER COPYING XERO	Box	28.55	28.55
4	1	8115-00-099-4377		BOX SMALL PARTS	Each	1.65	1.65
5	1	8105-00-281-1167		SACK,SHIPPING	Package	31.30	31.30
6	1	7520-00-105-8826		LEAD, REPOINTER, PENCIL	Each	11.51	11.51
7	1	5120-00-016-8554		TURRET HEAD ASSEMBLY	Each	61.44	61.44
8	1	7530-00-063-1413		CHART RECORDING INST	Hundred	6.61	6.61
9	1	8315-00-E01-0449		TAPE, TEXTILE	Square Foot	15.45	15.45
10	1	5905-00-104-5755		RESISTOR FIXED COMP	Each	0.18	0.18

8. From this page you can either print your order, or save it to your desktop. To print the order click on the "Print", to Save the order click "Save a Copy", and save to your documents. You can open the saved order at anytime to print it.



26-JUN-06 11:10 AM

AMMS Customer Order Report

Page 1 of 1

Order Created By: TMCOULSON

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Customer PO Nbr: 39332
Cost Center: 512300
Res Line:
WON:

Ship To Information

Name: TERRY LEWIS
Bldg / Room / Code: BLDG: HQ, ROOM: 1041, CODE: OCO
Facility / Center: NASA HEADQUARTERS
City / State / Zip: WASHINGTON, DC 20546
Org Code: GSFC

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5	1	8105-00-281-1167		SACK,SHIPPING	Package	31.30	31.30
6	1	7520-00-105-8826		LEAD, REPOINTER, PENCIL	Each	11.51	11.51
7	1	5120-00-016-6554		TURRET HEAD ASSEMBLY	Each	61.44	61.44
8	1	7530-00-063-1413		CHART RECORDING INST	Hundred	6.61	6.61
9	1	8315-00-E01-0449		TAPE, TEXTILE	Square Foot	15.45	15.45
10	1	5905-00-104-5755		RESISTOR FIXED COMP	Each	0.18	0.18

AMMS TRAINING SCRIPT

Entering Customer Orders Using Existing Customer Numbers

Purpose

The purpose of this training script is to explain how to place orders in AMMS using a Customer Number.

Audience

AMMS Users

Prepared By	Theresa Coulson, Rob Amos, Mike Hopper
Creation Date:	10/11/2005
Document Name	TS01_Customer Number.doc
Version	2
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Misc\.	

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Summary of Changes

This training document will walk you through the process of entering an order in the AMMS Order Entry form when using your existing customer number as Customer Search criteria.

For the 2006 Fiscal Year, several changes were required for the AMMS Order Entry System. These changes include:

- Financial string input fields Fund, WBS, Cost Center, and Internal Order were re-arranged on the Order Entry form.
- The JON input field was removed; you may no longer lookup customers using a JON number.
- Searches may be done by existing customer numbers or by specifying the complete Fund, WBS, Cost Center, and Internal Order financial string.
- Financial string input fields Reservation Document Number and Reservation Document Line were added. These financial string fields are required when using reimbursable or working capital financial strings
- Financial string fields Network Address (Network) and Network Activity (Activity) were added for future use. These fields are not active on the form.
- The existing Work Order field (WON) was increased from 7 characters to 20 characters. This change allows a user to specify longer project identifiers.
- Most financial string field values can be searched using “Lists of Values” (LOV) pull-down lists
- Inactive customer numbers are now flagged preventing orders from being placed using out-dated financial strings.
- New and enhanced informational alerts and error messages for fields and functions.

Task 1: Accessing the AMMS Order Entry System

This section will describe how to access the AMMS Oracle system and log in using your AMMS userid and password. If you are not currently enrolled as an AMMS user, you must contact AMMS Helpdesk at 301-286-2525 or send an e-mail to Tabatha Luskey at Tabatha.L.Luskey.1@gsfc nasa.gov.

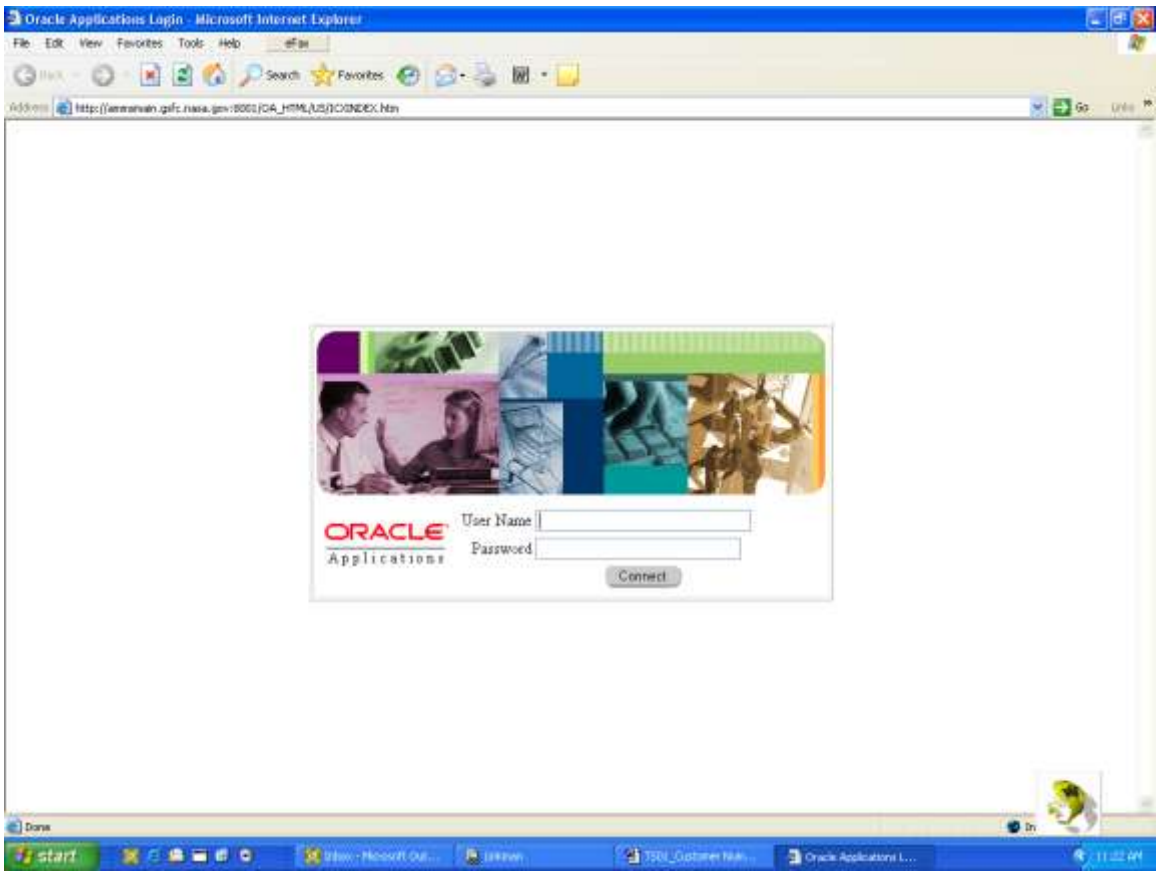
More information on the AMMS System is available on the AMMS web site http://amms/

Step 1A: Access the AMMS System Web Site

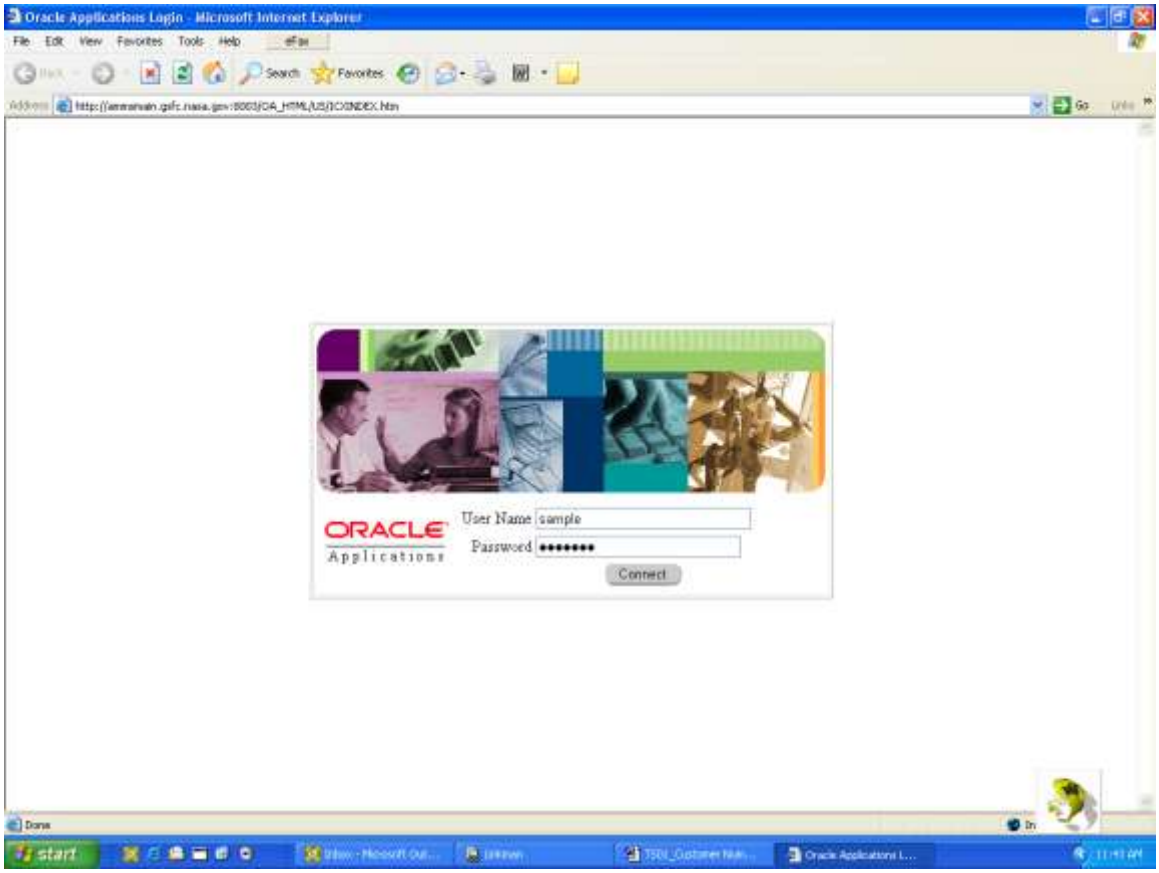
1. From your web browser, enter the following URL to access the AMMS system:

   http://ammsmain.gsfc nasa.gov:8001/OA_HTML/US/ICXINDEX htm

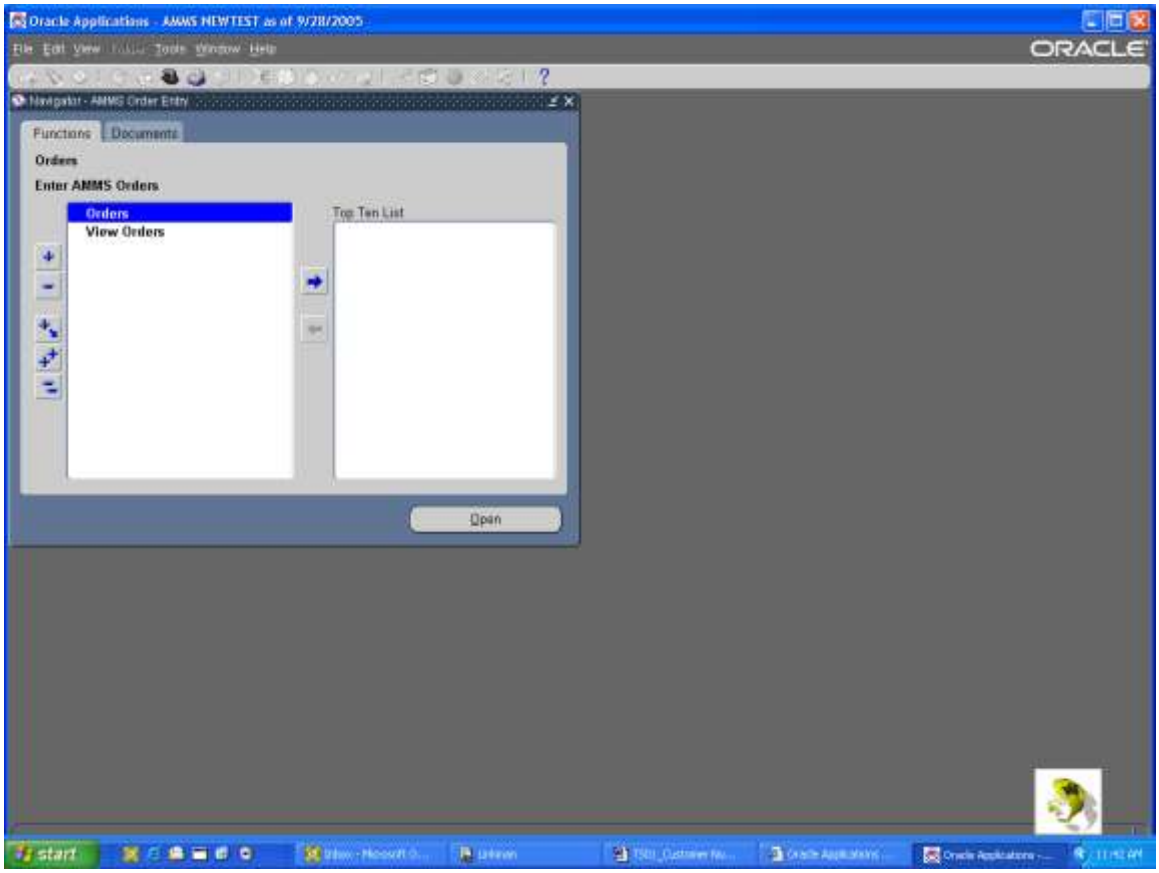
   The following screen should appear:



2. Enter your AMMS userid and password in the fields on the screen and then click on the **Connect** button. Note, your password will not display in text but will display as asterisks (*).



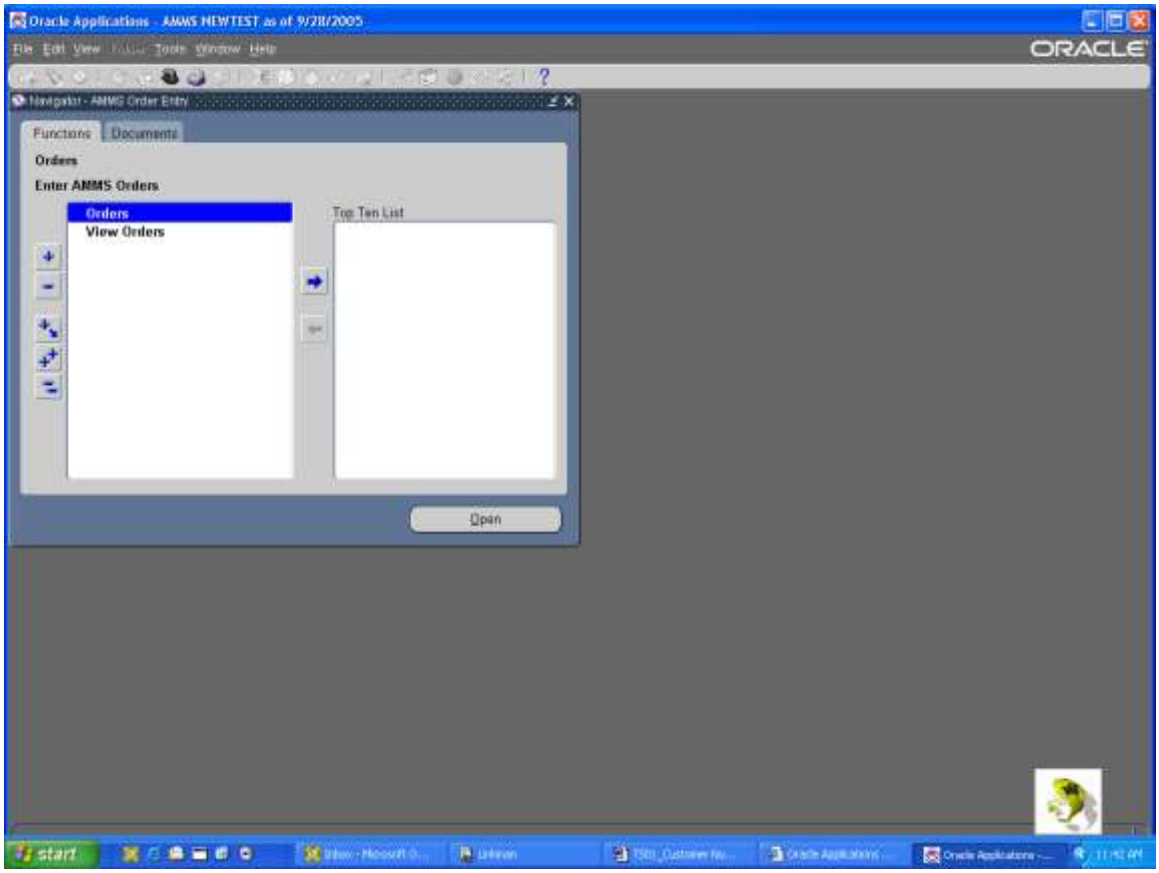
3. The AMMS Function menu will appear:



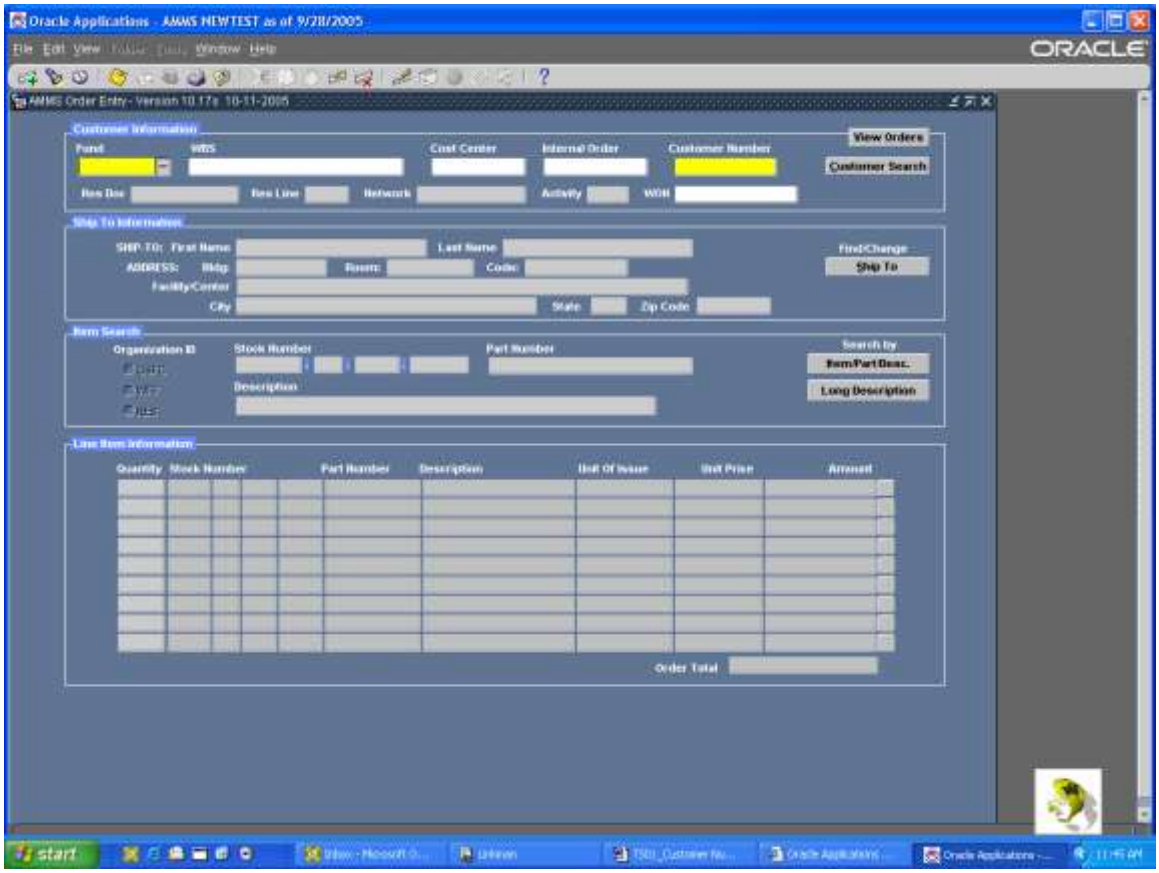
Step 1B: Navigating to the AMMS Order Entry Screen

Once you have successfully accessed the AMMS system and the list of available functions are displayed, you are ready to navigate to the AMMS Order Entry screen.

1. The AMMS function menu should appear:



2. Click on **Orders** to highlight it and then press **Open** to go to the AMMS Order Entry screen. The following screen should appear:



3. You are now ready to begin placing orders in the AMMS Order Entry form

Task 2: Entering AMMS Orders Using an Existing Customer Number

There are two methods of entering orders for a customer in the AMMS Order Entry form:

1. Enter a active Customer Number
2. Enter in the full SAP financial string

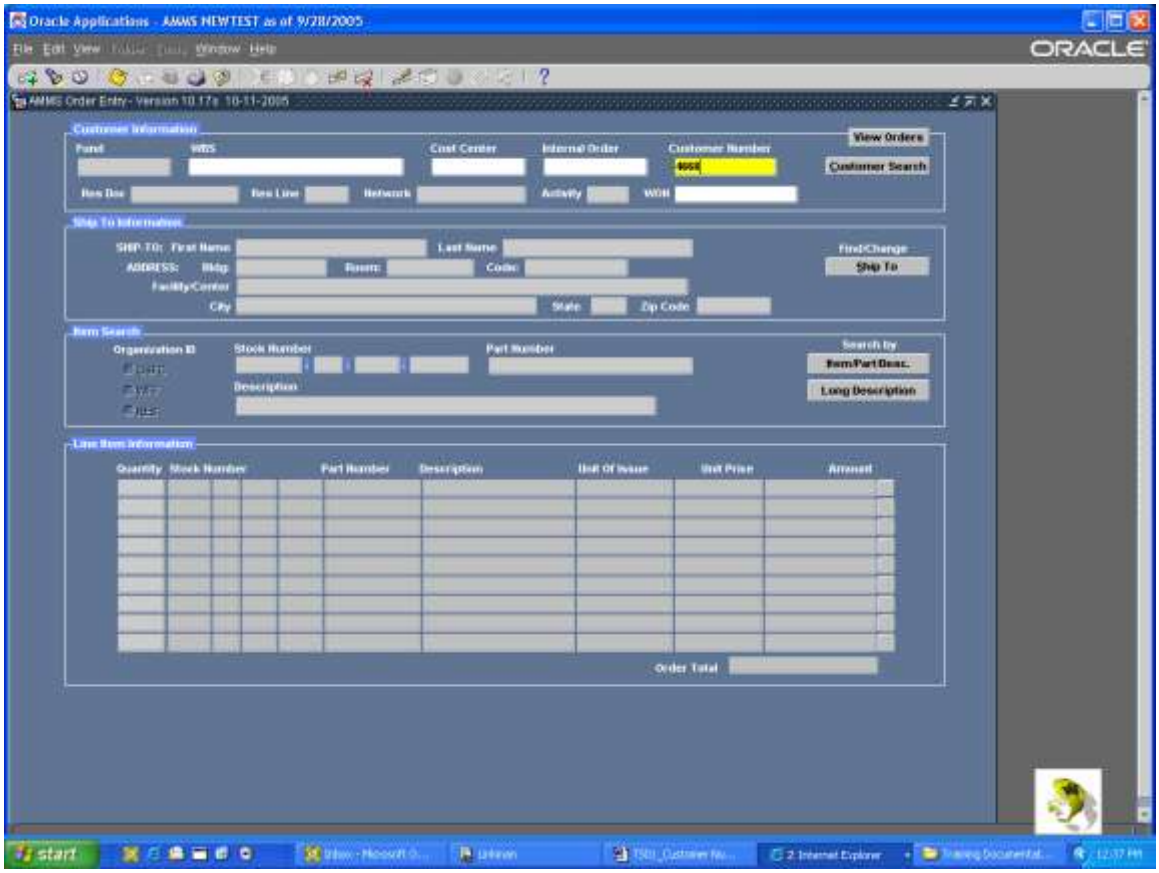
This section discusses how to enter an order for an existing active customer using the customer number. If you know the specific Customer Number, then see *Step 2A: Entering a Specific Customer Number*. If you do not know the Customer Number, you can search the AMMS system for that customer. To do this, see *Step 2B*: *Querying All Existing Customer Numbers.*

Note: *An "active customer" is an AMMS defined customer who is assigned a valid FY05 or FY06 SAP financial string. Customers from previous years or who no longer have funding are marked "inactive" in the AMMS system and may not order additional supplies.*

Step 2A: Entering a Specific Customer Number

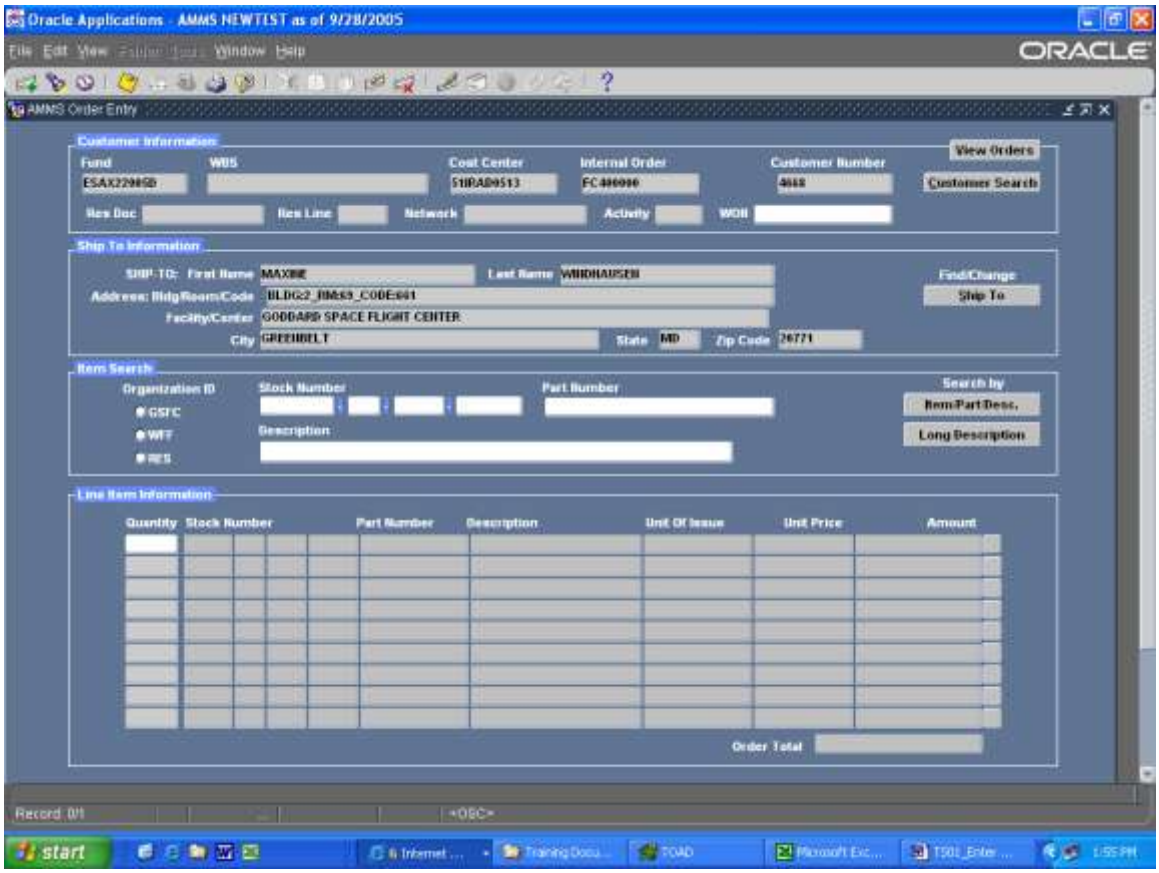
If you know the specific Customer Number, then you can enter it directly in the AMMS Order Entry form and begin ordering items. To do so:

1. Enter the Customer Number in Customer Number field and click on the **Customer Search** button.



2. The Fund, WBS, Cost Center and Internal Order financial fields will be populated with data and the default "Ship To" information should be displayed.

   Note: *If a reimbursable fund is associated with your Customer Number, this data will not load but an Order Entry Alert window will pop-up. To specify the reimbursable fund information, proceed to Step 2c.*



3. Verify that the "Ship To" information is correct. If it is not, then proceed to the section *Task 3 Updating the Ship To Information*. If no address information is displayed, you will see an alert advising of this. See section *Task 3 Updating the Ship To Information* on how to add a address for this customer
   .
4. If the "Ship To" information is correct, proceed to section *Task 4 Item Search*.

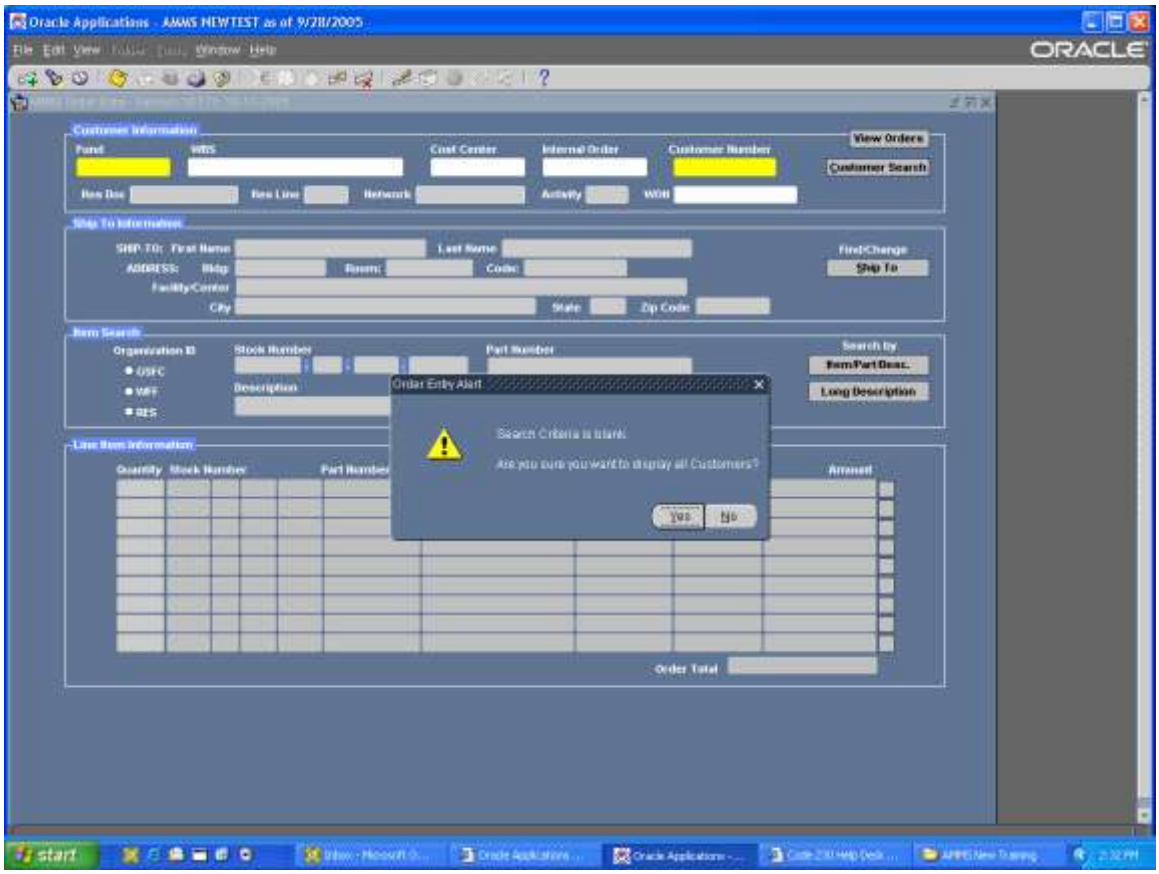
Step 2B: Querying All Existing Customer Numbers

If you do not remember the specific customer number, you can have the AMMS system display all of the active customer numbers. This allows you to choose the correct Customer Number from a list of values.

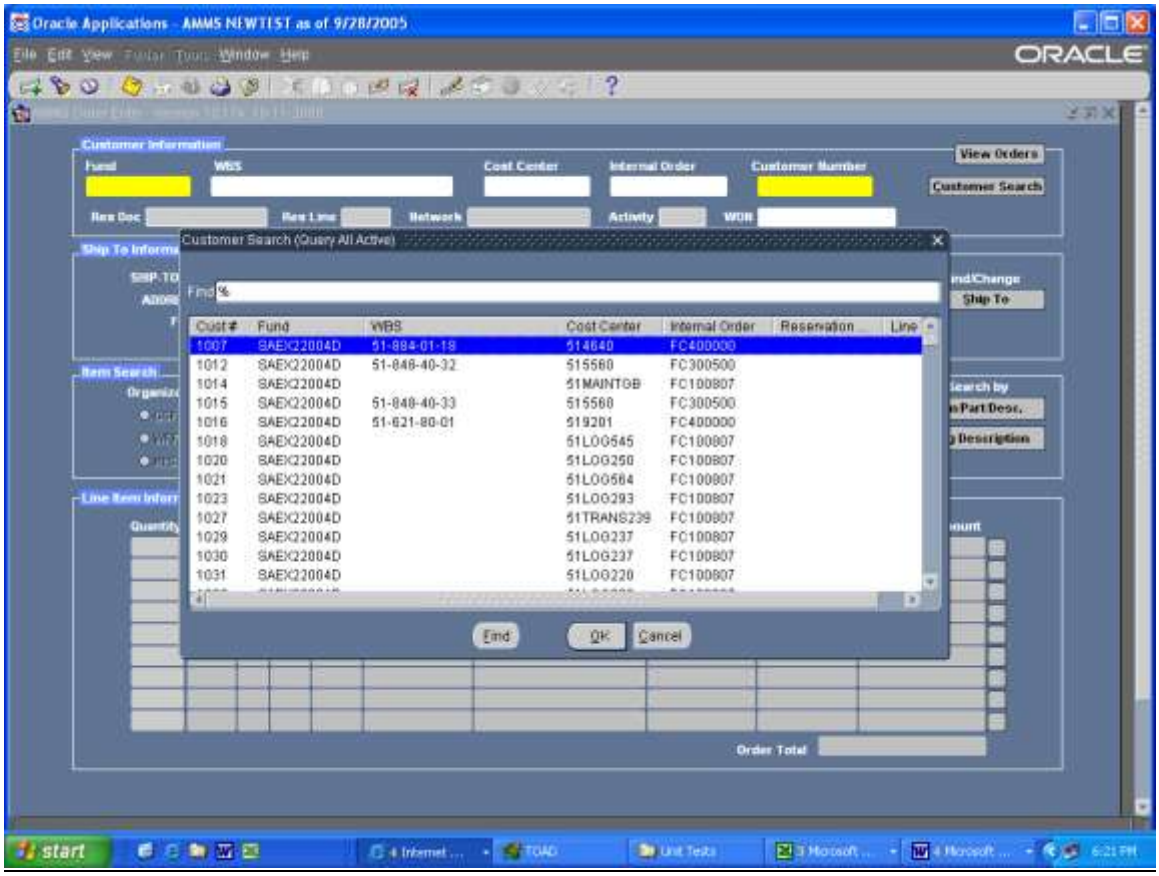
Note: *Using this Query-All method will not allow you to change the Reservation Document or Reservation Line values. This is applicable only when a reimbursable fund is associated with the customer number selected.*

To search for a Customer Number, you must:

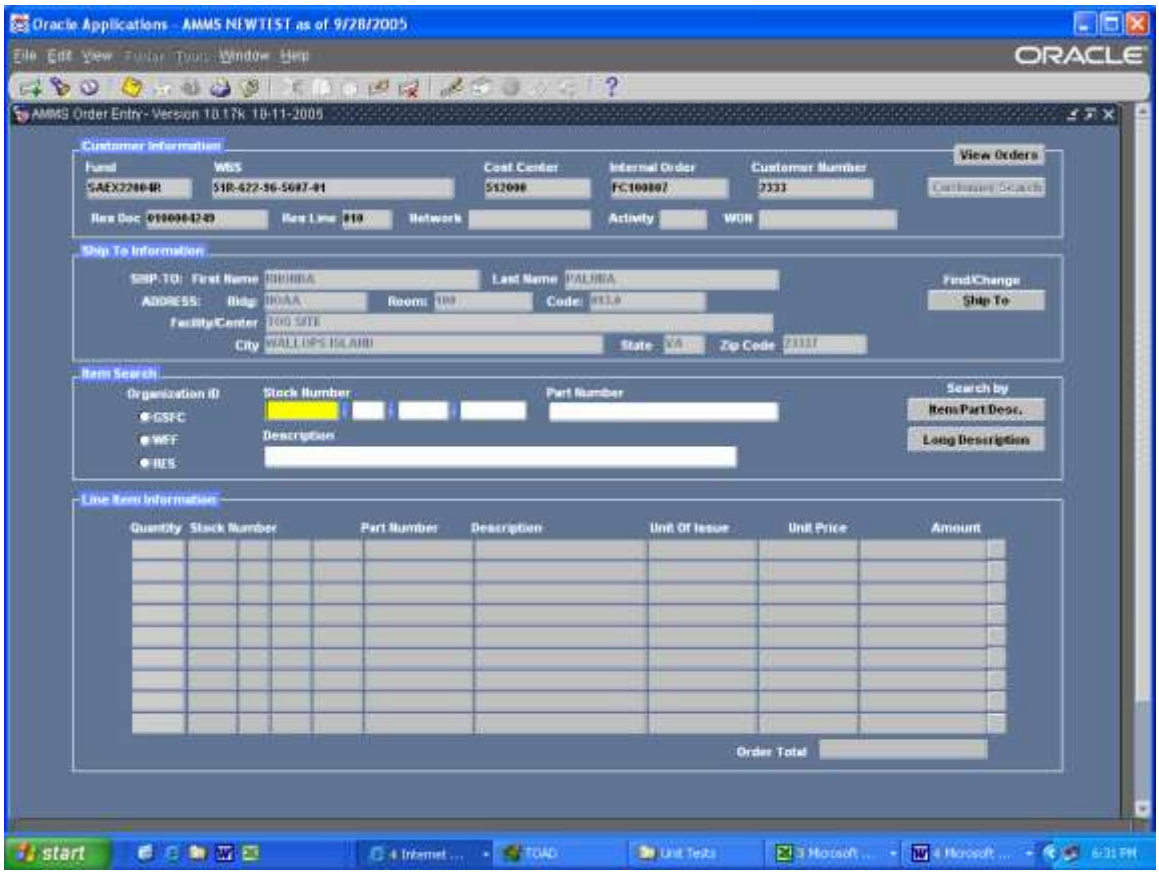
1. Without entering any information in the Customer Number field (or any other field in the Customer Search region), click the **Customer Search** button. The **Customer Search (Query All Active)** List of Values window will display.



2. Click **Yes** to display the list of all Customer Numbers



3. Scroll through the list until you find the customer you are looking for then click the OK button. The fund string data will load into the form and “Ship To information” will display.

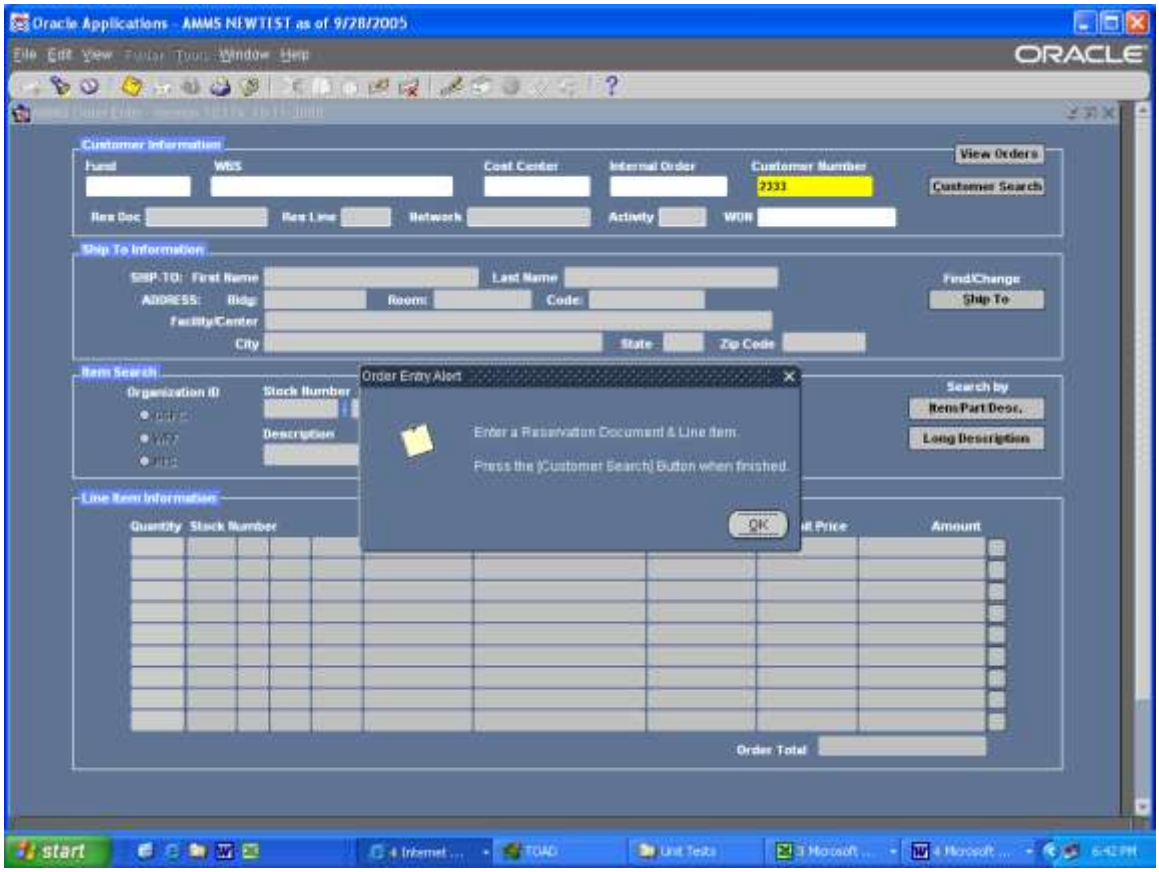


4. Verify that the “Ship To” information is correct. If it is not, then proceed to the section *Task 3 Updating the Ship To Information*. If no address information is displayed, you will see an alert advising of this. See section *Task 3 Updating the Ship To Information* on how to add a address for this customer
.
5. If the “Ship To” information is correct, proceed to section *Task 4 Item Search*.

Step 2C: Entering Reservation Information

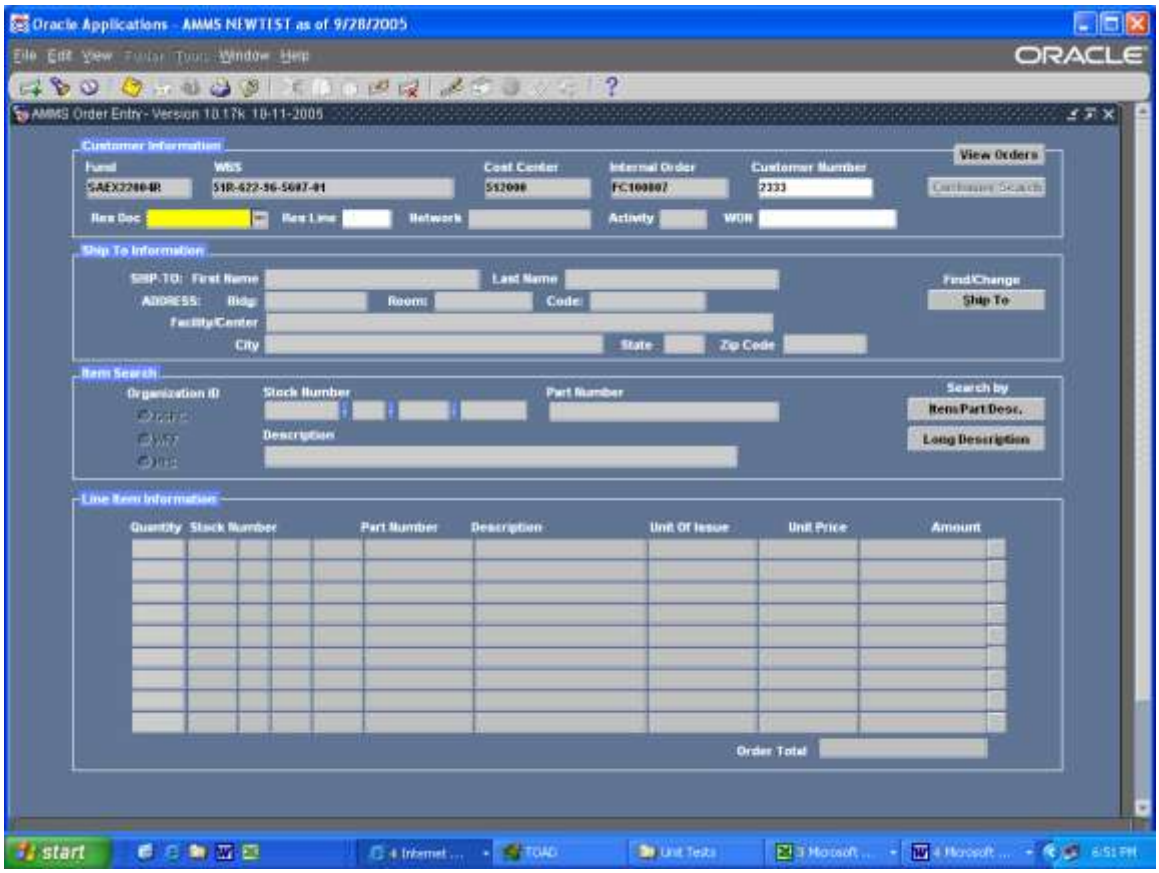
If the Fund associated with your customer number is a reimbursable or working capital fund, AMMS requires you to enter a Reservation Document and Line Number. Only Reservation Document and Line information that is valid for the Fund and WBS values associated with your Customer Number can be entered into the **Res Doc** and **Res Line** fields.

1. If a Customer Number requires a Reservation Document and Line Number, the following alert will appear after you enter the Customer Number:



2. Click **OK** to acknowledge this Order Entry Alert.

3. The Financial String values will load into the Fund, WBS, Cost Center and Internal Order fields and the Reservation Document (**Res Doc**) field will highlight in yellow.

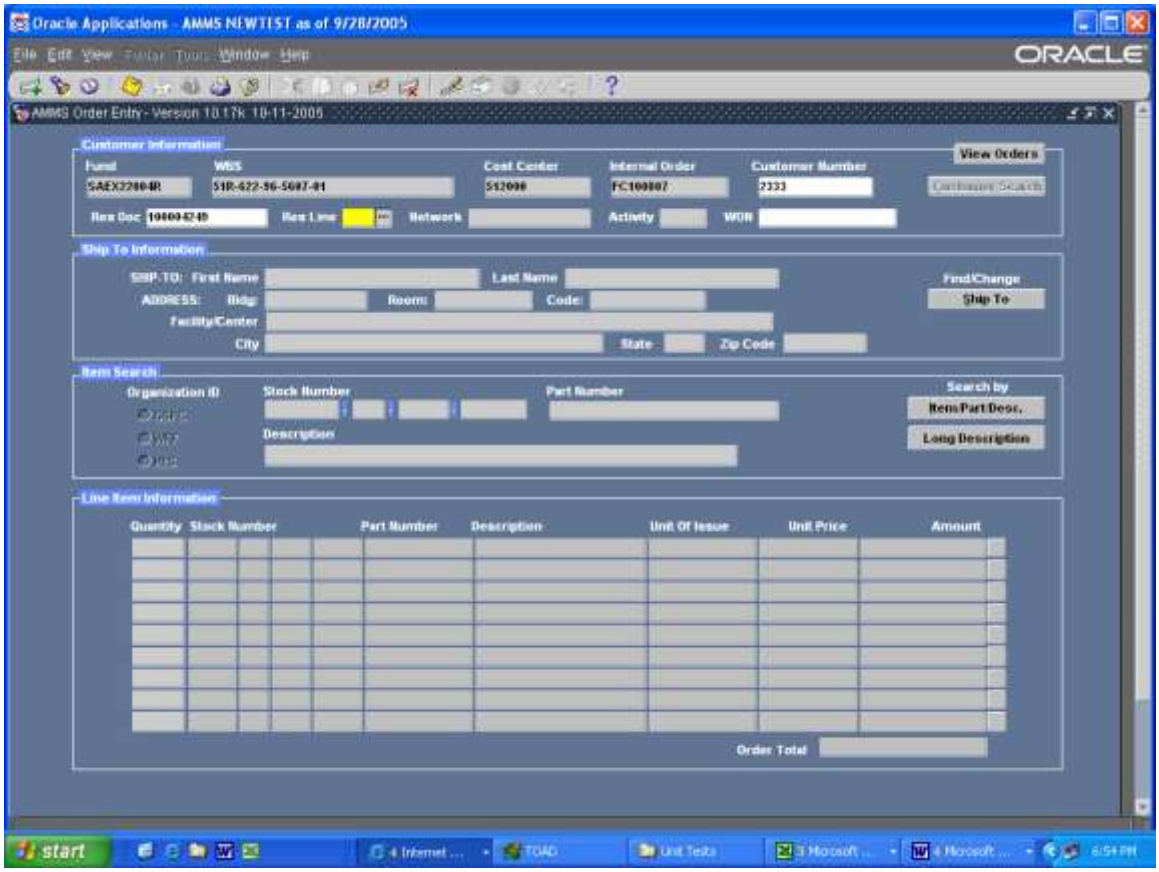


4. If you know the correct Reservation Document Number, you can enter a value directly in the **Res Doc** field or click on the List of Values (LOV) button ... on the right side of the field to get a List of Values valid for that Customer Number.

5. If you use the List of Values button, highlight the Reservation Document Number you want and click the **OK** button.

   If a value automatically loaded into the field when you clicked the LOV button, it means there is only one valid Reservation Document Number in the List of Values.

6. The selected Reservation Document number will load into the field and the Reservation Line (**Res Line**) field will highlight in yellow.



7. If you know the correct Reservation Line Number, you can enter a value directly in the **Res Line** field or click on the List of Values (LOV) button ... on the right side of the field to get a List of Values valid for that Customer Number.

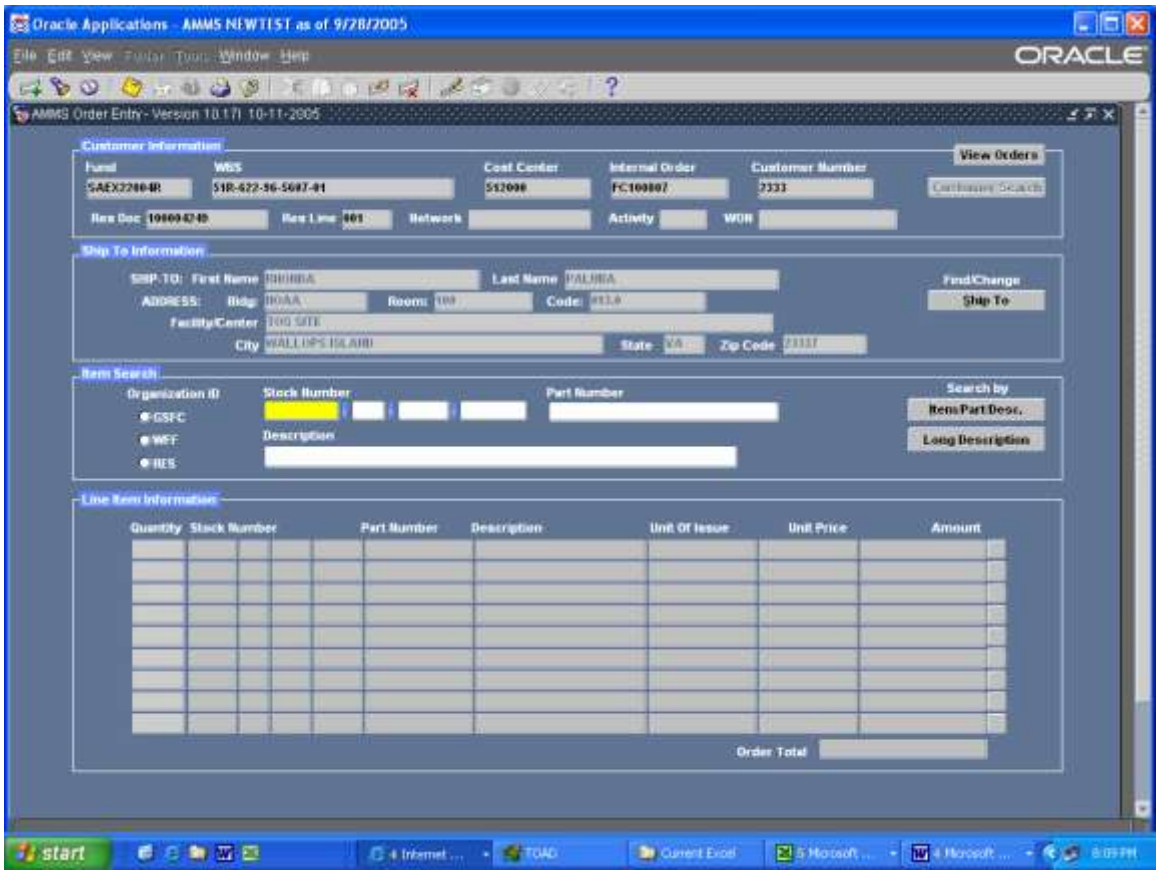
8. If you use the List of Values button, highlight the Reservation Line Number you want and click the **OK** button.

   If a value automatically loaded into the field when you clicked the LOV button, it means there is only one valid Reservation Line Number in the List of Values.

9. The selected Reservation Line Number will load into the field.

10. Once you have a valid Reservation Line accepted, click the **Customer Search** button.

11. After clicking the Customer Search button, the Fund, WBS, Cost Center, Internal Order, Res Doc and Res Line fields will be populated with data and “Ship To” information should be displayed.

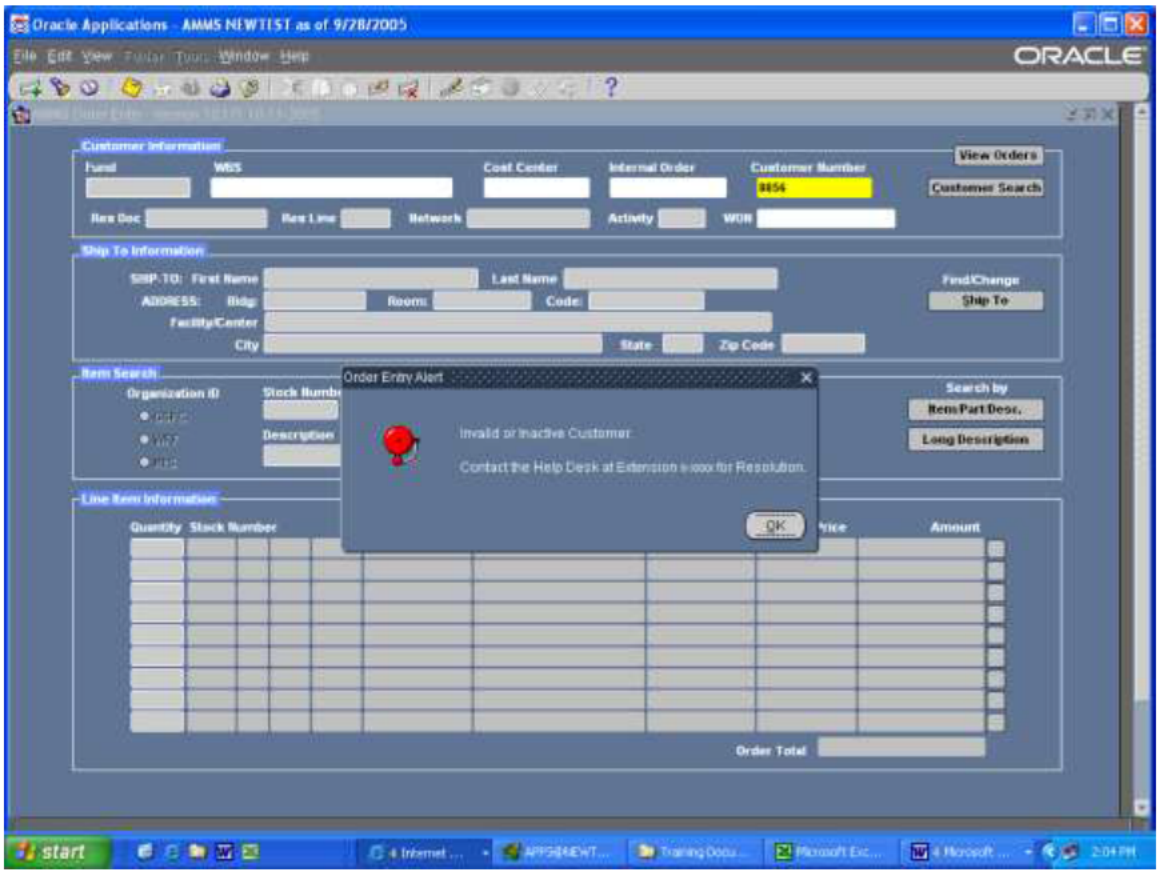


6. Verify that the “Ship To” information is correct. If it is not, then proceed to the section *Task 3 Updating the Ship To Information*. If no address information is displayed, you will see an alert advising of this. See section *Task 3 Updating the Ship To Information* on how to add a address for this customer
.
7. If the “Ship To” information is correct, proceed to section *Task 4 Item Search*.

Common Error Messages for Customer Search

Customer Number not found or invalid

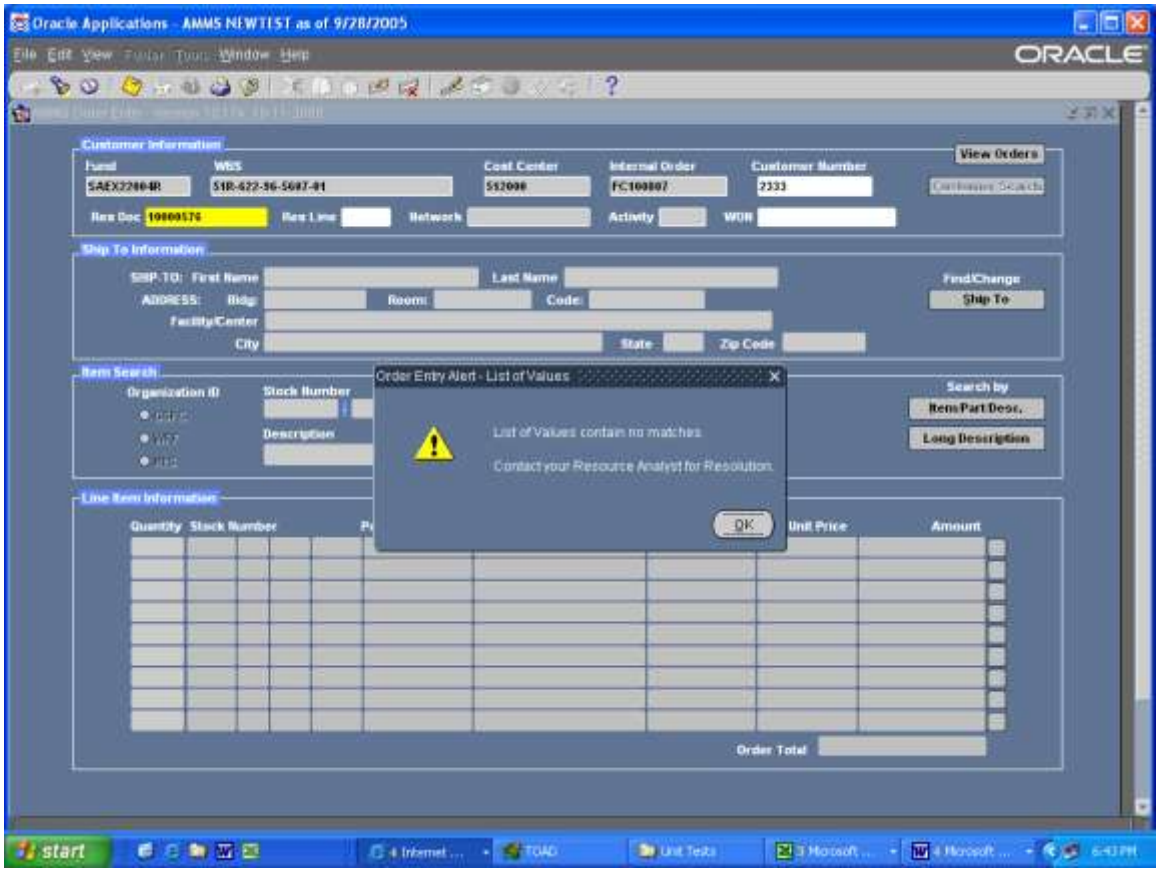
1. If the customer number you entered is not valid, the following Order Entry Alert window will appear.



2. Click **OK** to this alert and you will be returned to a blank screen. If you mistyped your customer number, try re-entering it. If this alert appears again, contact the Help Desk at the phone number listed in the alert.

No Matching Reservation Document

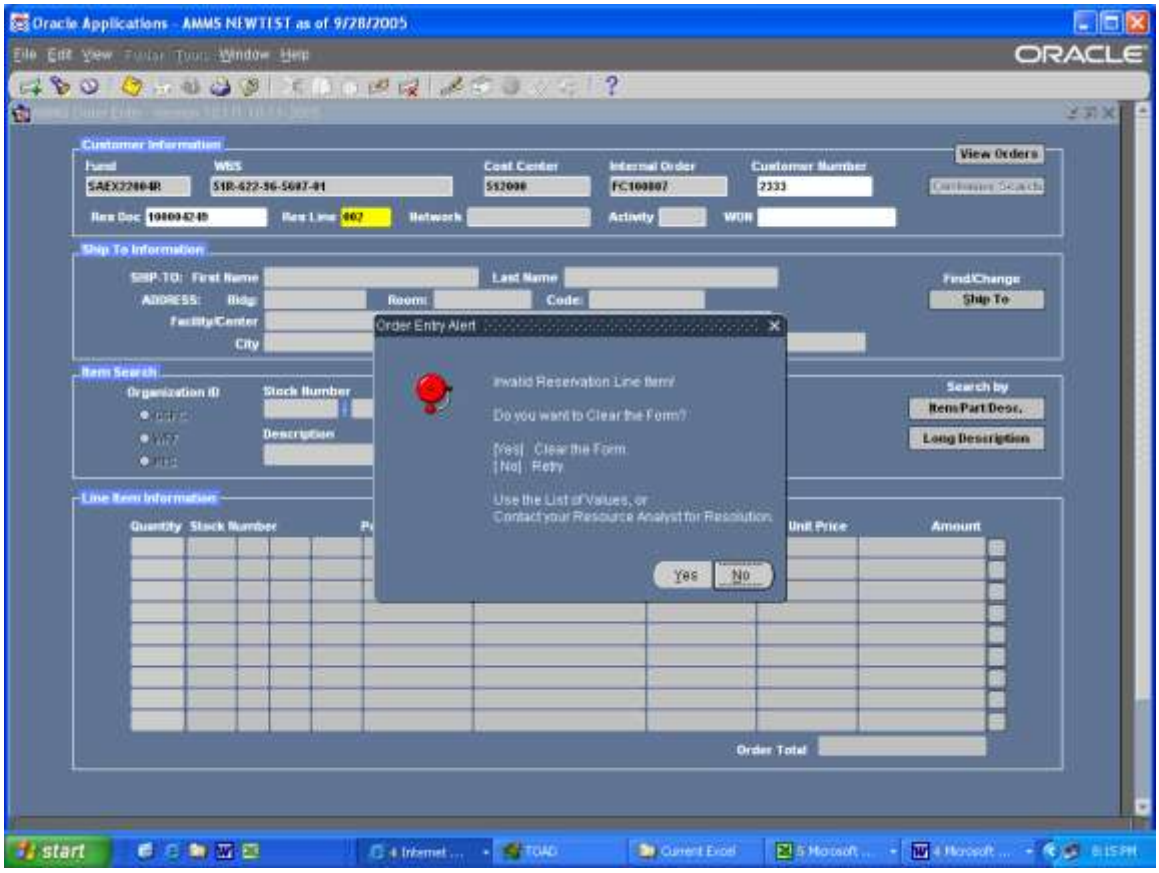
1. If you entered a Reservation Document Number directly into the **Res Doc** field, but it is not valid, this Order Entry Alert will appear.



2. If you mistyped the entry, click **OK** to the alert and the **Res Doc** field will clear. You can then re-enter a Reservation Document Number or click on the List of Values button to get valid document numbers. If none of the valid document numbers are correct, contact your Resource Analyst to resolve the problem.

Invalid Reservation Line Number

1. If you entered a Reservation Line directly into the **Res Line** field, but it is not valid, this Order Entry Alert will appear:



2. If you mistyped the entry, click the No button in the alert window and the **Res Line** field will clear. You can then re-enter a **Res Line** value or click on the List of Values button to get valid document numbers. If none of the valid reservation line numbers are correct, click the **Yes** button which will clear all fields of the form and contact your Resource Analyst to resolve.

Task 3: Updating the Ship To Information

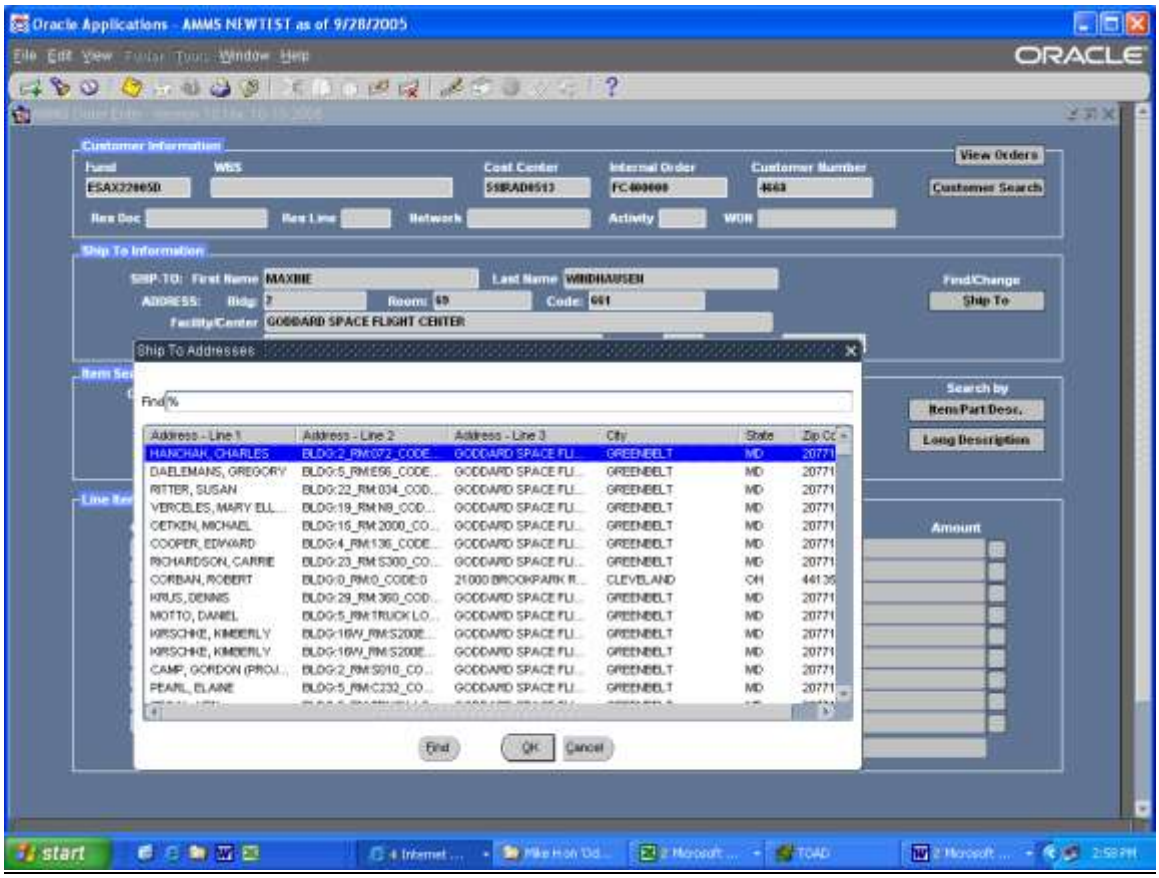
Step 3A: Changing the Ship To Information

1. If you need to change the Ship To information, click on the **Ship To** button.

2. A **Ship To Addresses** List of Values display will appear, scroll through the list to find the address you want. You can shorten the list by typing a portion of the value before the '%' in the Find line of the List of Values.

3. Once you find the address you need, click on the line and it will highlight in blue.

4. Click the **OK** button to close the List of Values window and the selected address information will load into the form.



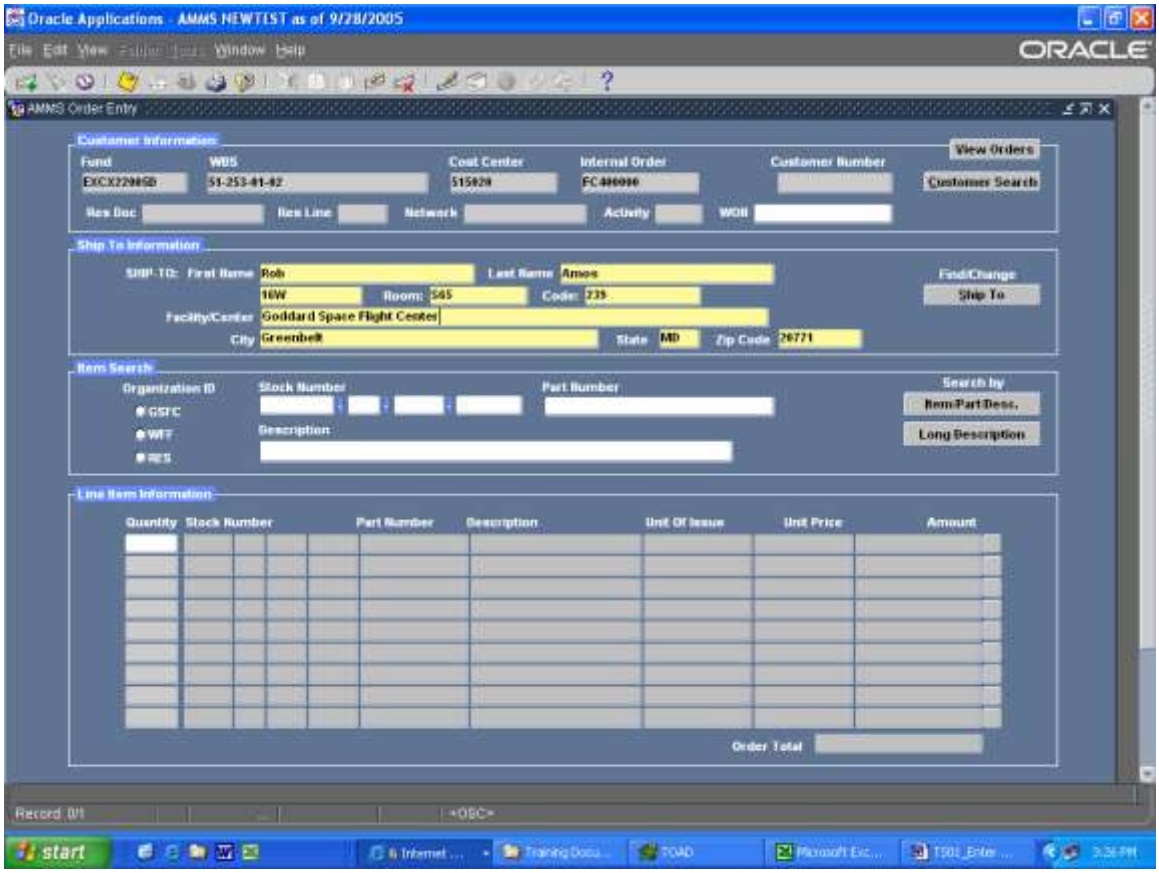
5. If the address you need is not in the List of Values, click the **Cancel** button and proceed *Step 3B: Adding New Ship To Information*.

Step 3B: Adding New Ship To Information

If the correct customer shipping information is not displayed or you need to add a new shipping contact for this Customer Number, then:

1. Fill in the blanks, customers first and last name, building, room, code, facility/center, city, state and zip code. Once you have completed this click in the **Stock Number** field and the address field will become gray.

WARNING: *When specifying your building, room and code, do not add the words "building", "room" or "code" in front of the number. For example, Building 16W should only be specified as 16W in the* ***Building*** *field. Adding any additional words to the address field may cause AMMS to not process your order delaying the receipt of materials to your customer.*

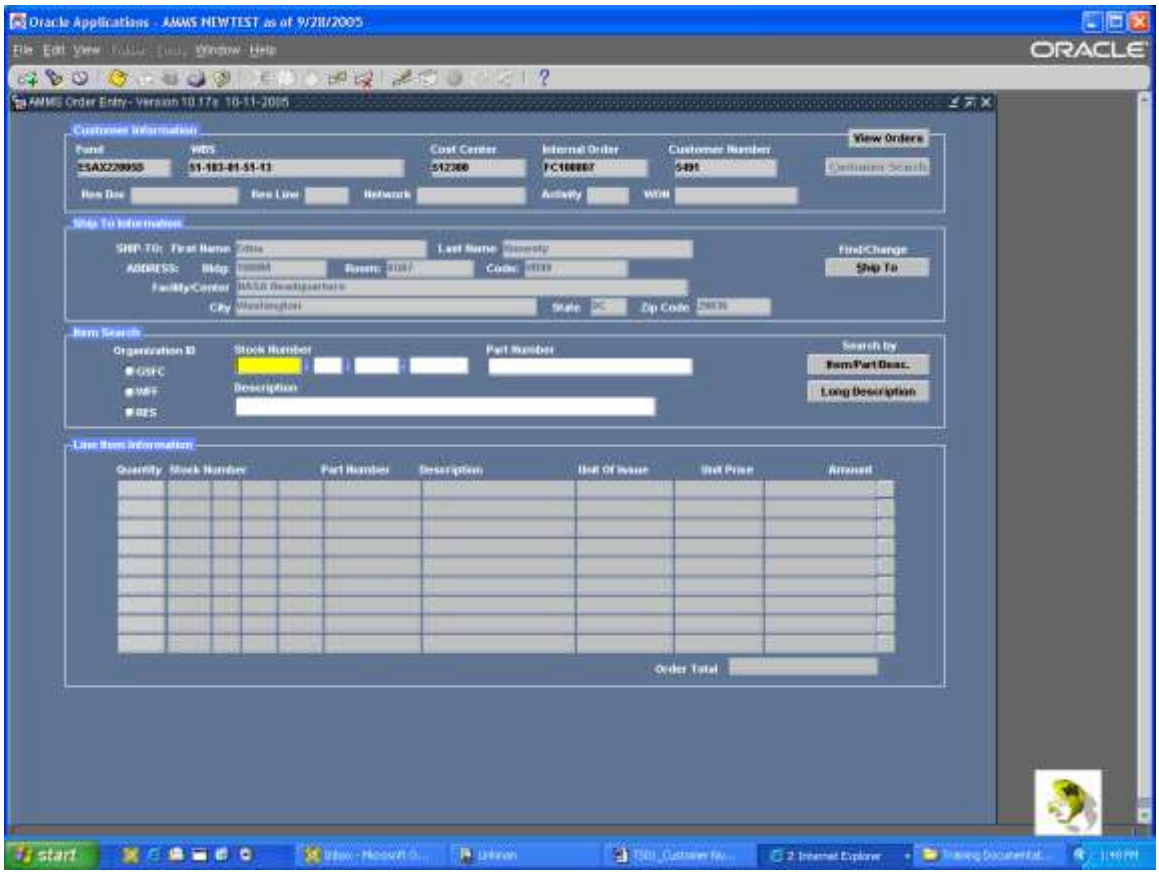


Task 4: Item Search

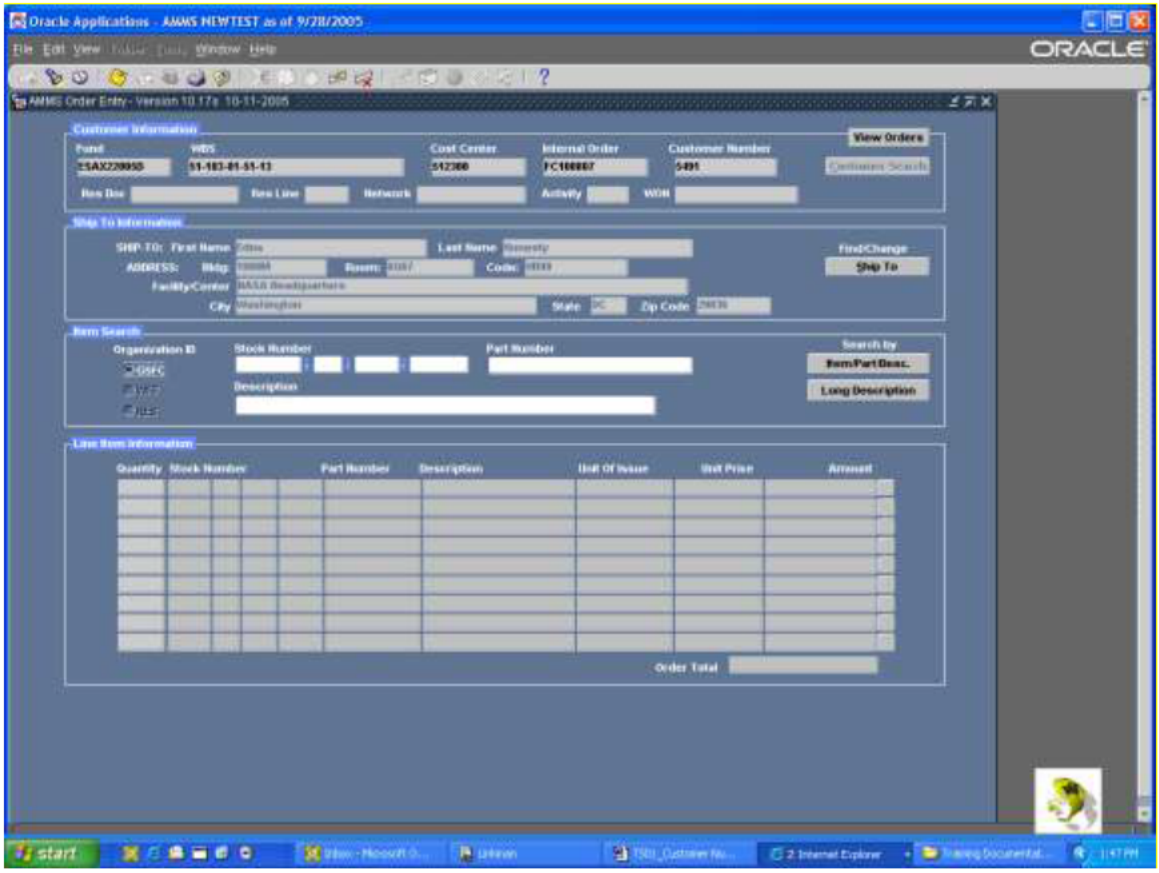
Step 4A: Selecting Your Organization

In order to begin adding stock items to your order, you first select your organization.

1. Click the 'Radio Button' beside your NASA **Organization ID**



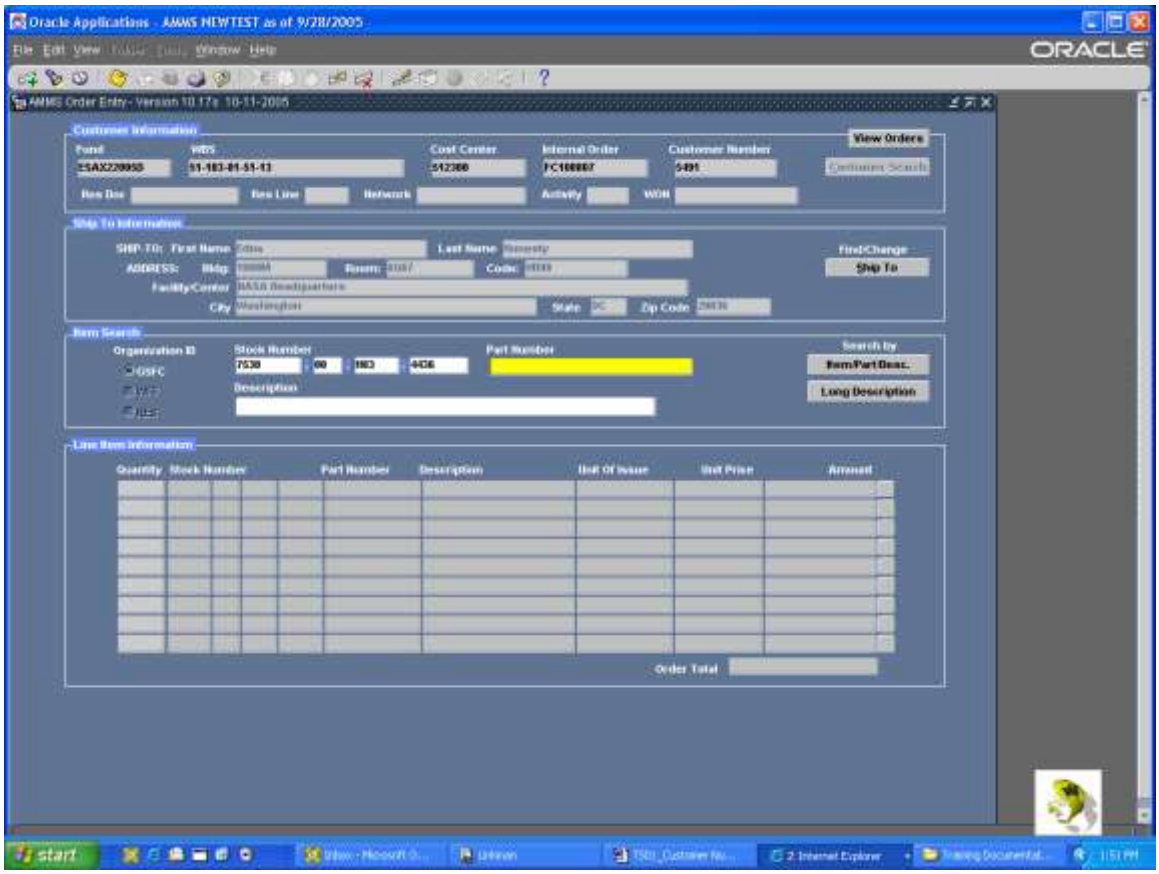
2. The selected NASA Organization ID will be selected and all other options are inactivated.



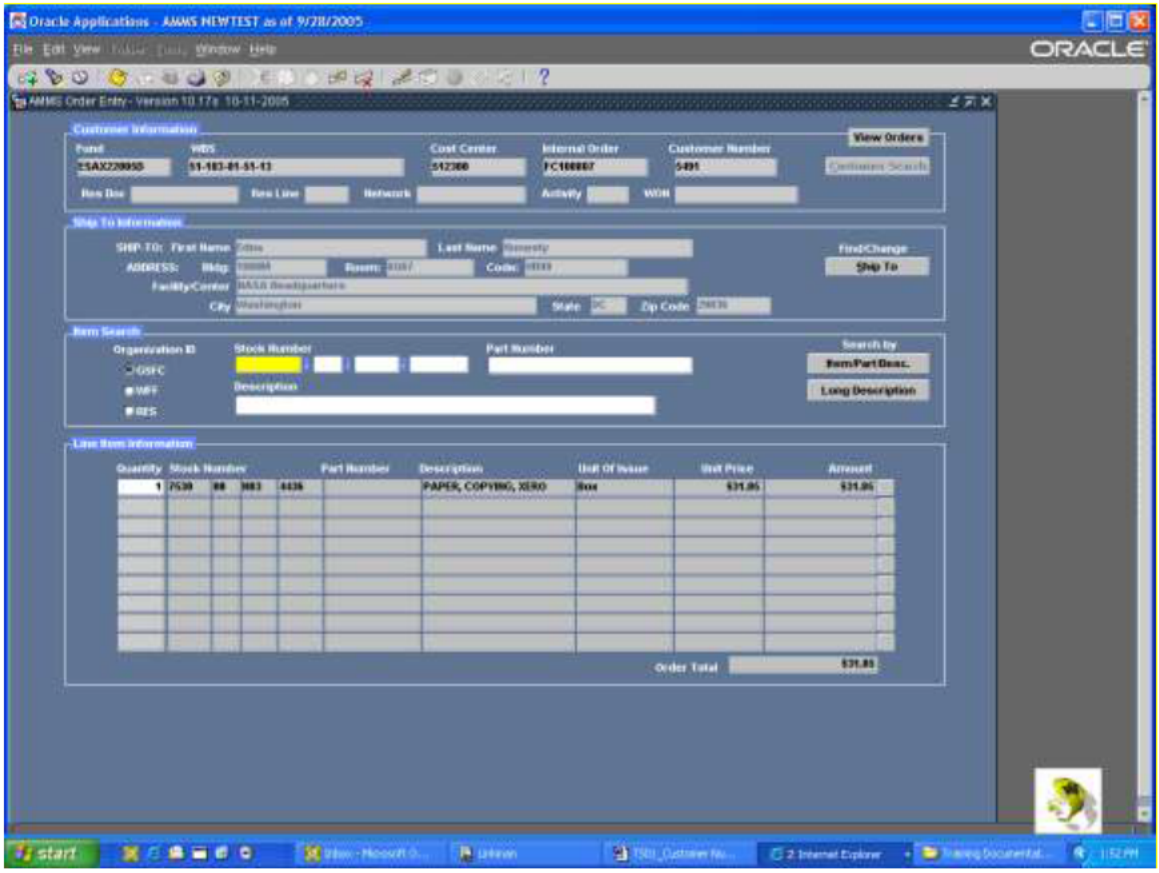
Step 4B: Enter Item Number

To begin ordering items for your customer, you must now specify the item stock number.

1. In the Item Search area, enter the Item Number in the **Stock Number** field, and then click on the **Item/Part/Desc** button.



2. Data will appear in the Line Item Information section.

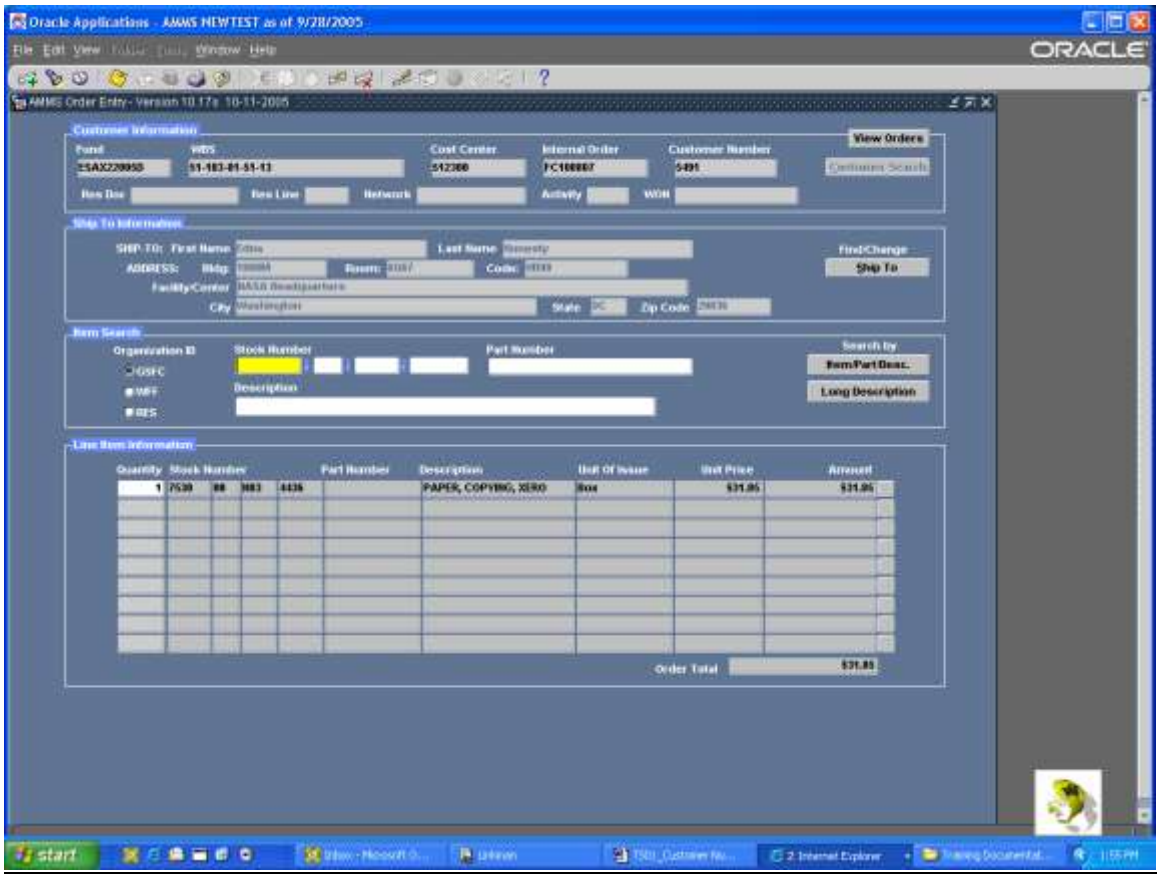


Task 5: Entering Line Item Information

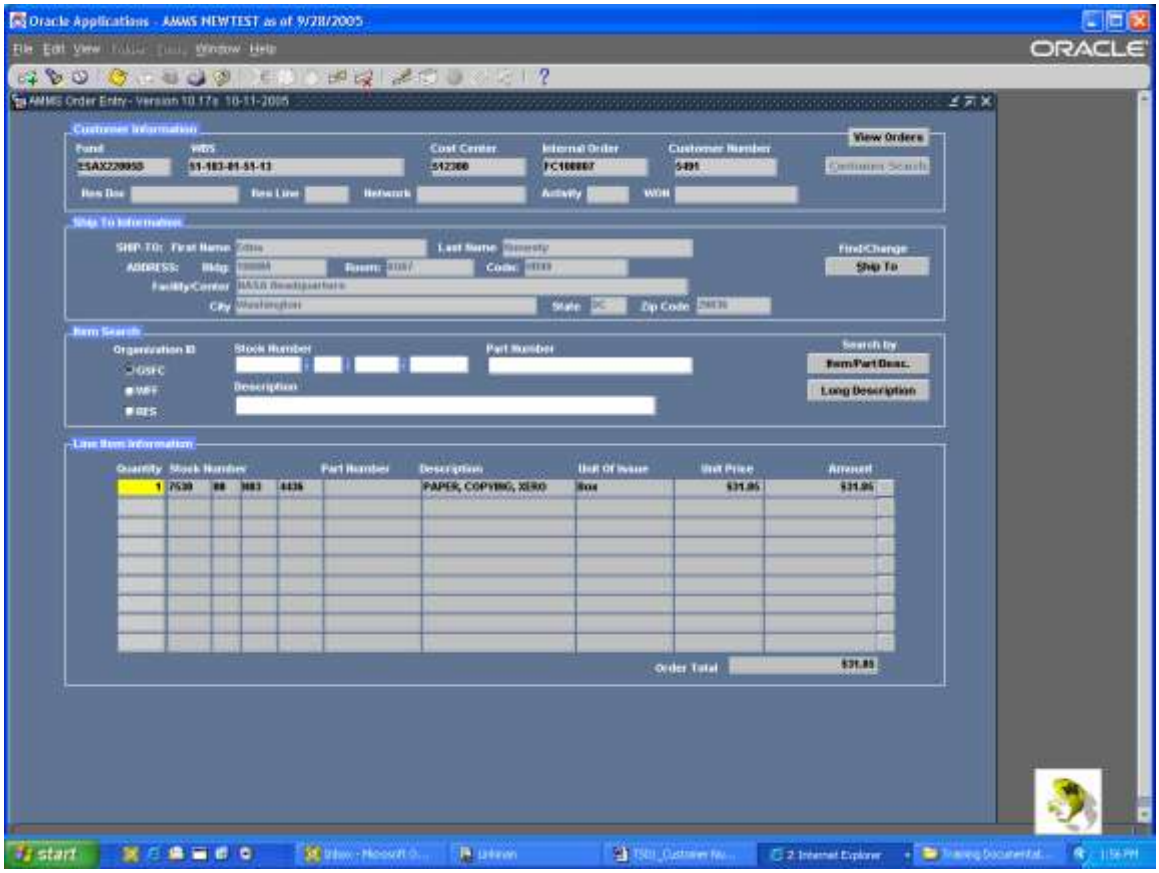
Step 5A: Updating the Line Item Quantity

By default, the quantity will of each line item ordered defaults to 1. If you want to order more than one of this item, you can you can change the quantity.

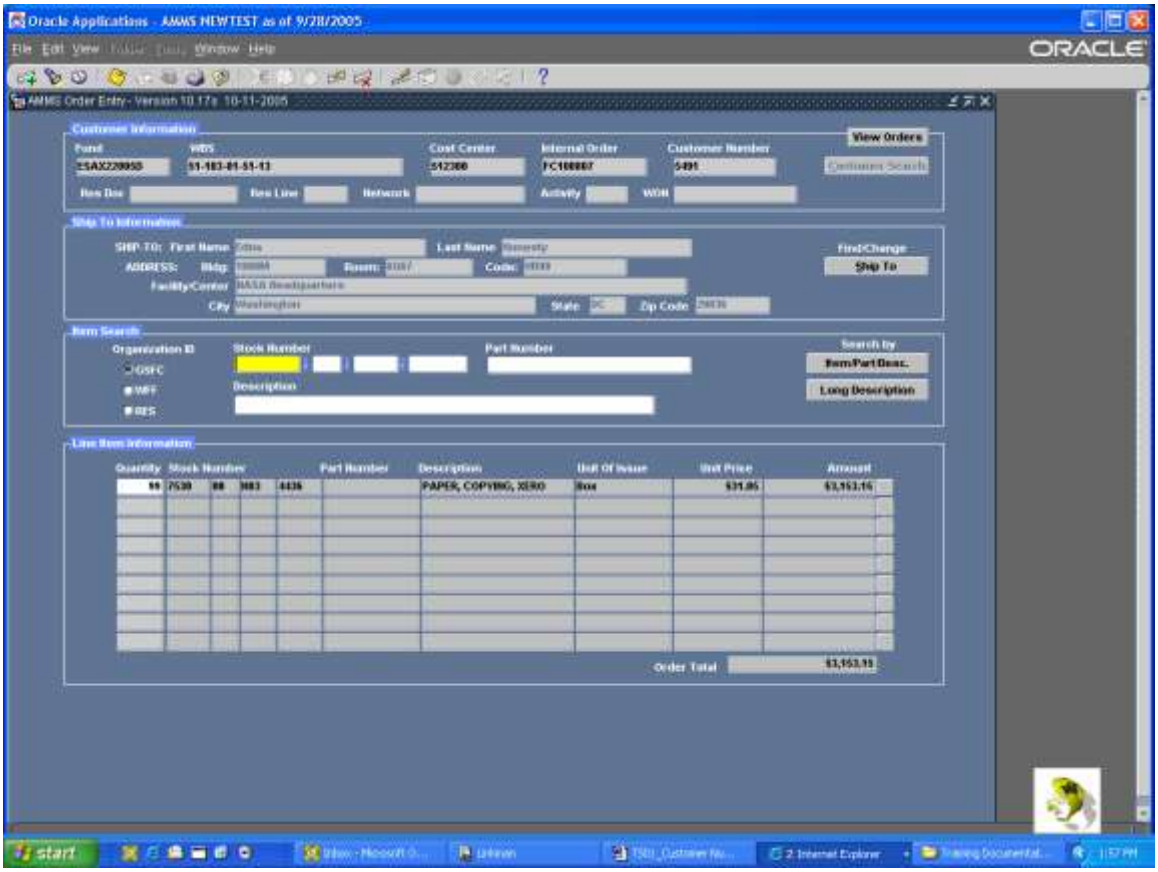
1. Click in the Quantity field for the line item.



2. It will turn yellow.



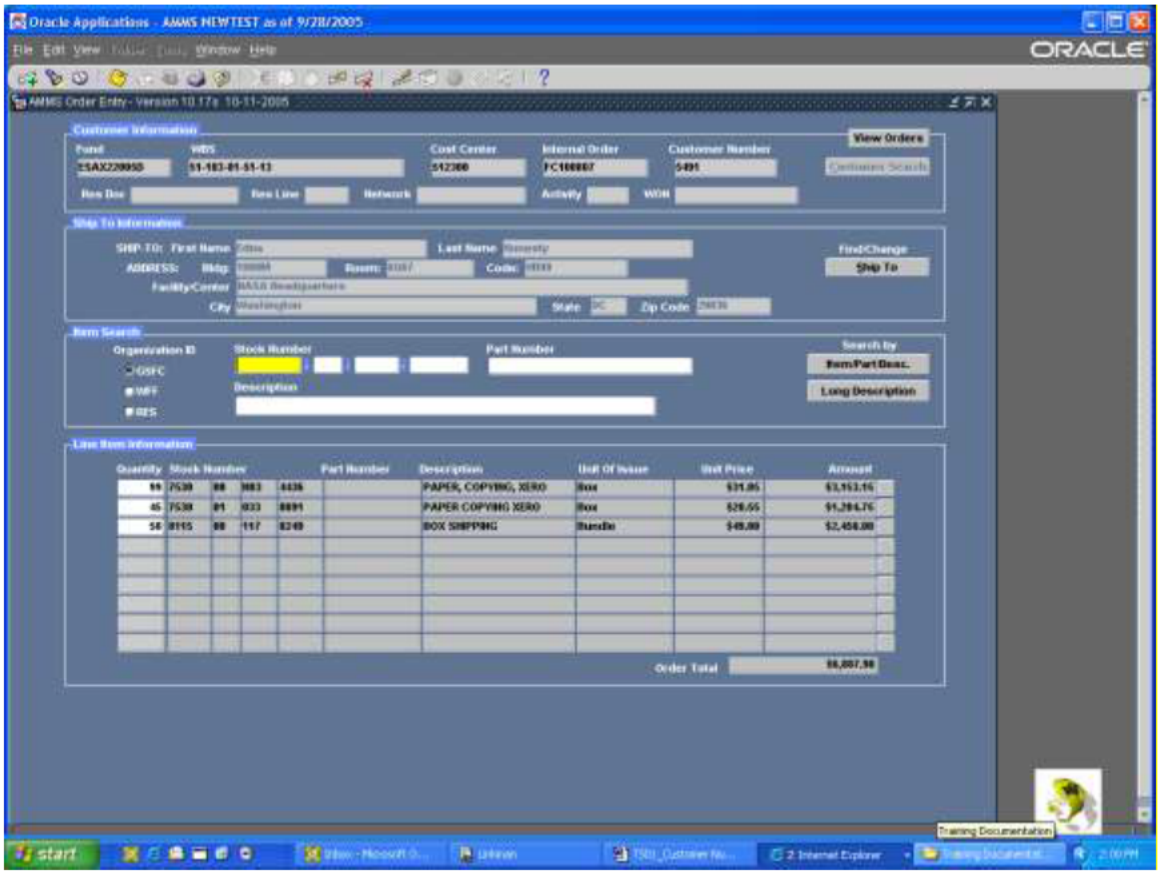
3. Update the quantity for that item and then click back in the Stock Number field to add a new line item.



Step 5B: Entering Additional Order Lines

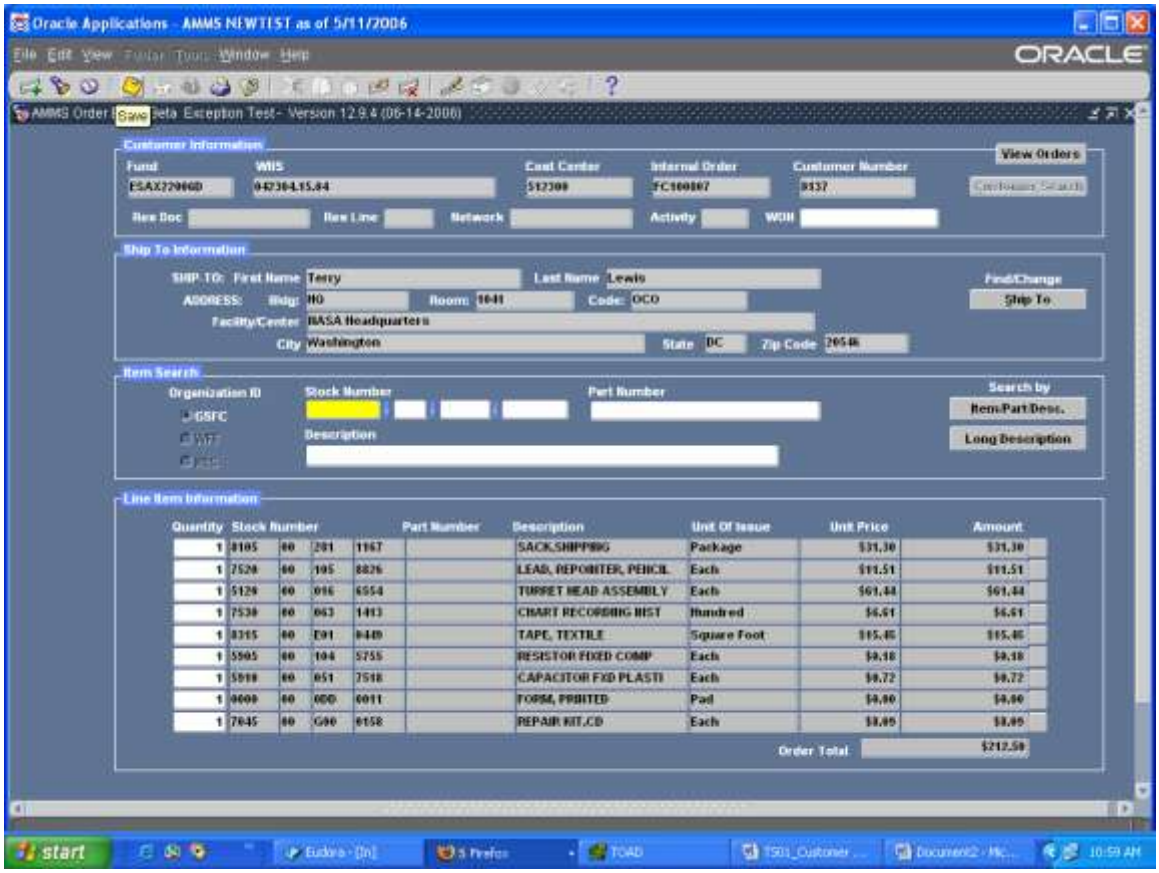
You can add up to 99 lines to one order just repeat the steps where you enter the item number, remember to update the quantities if needed.

All items will be in the Line Item Information section, verify that your quantities are correct.



Saving Your Order

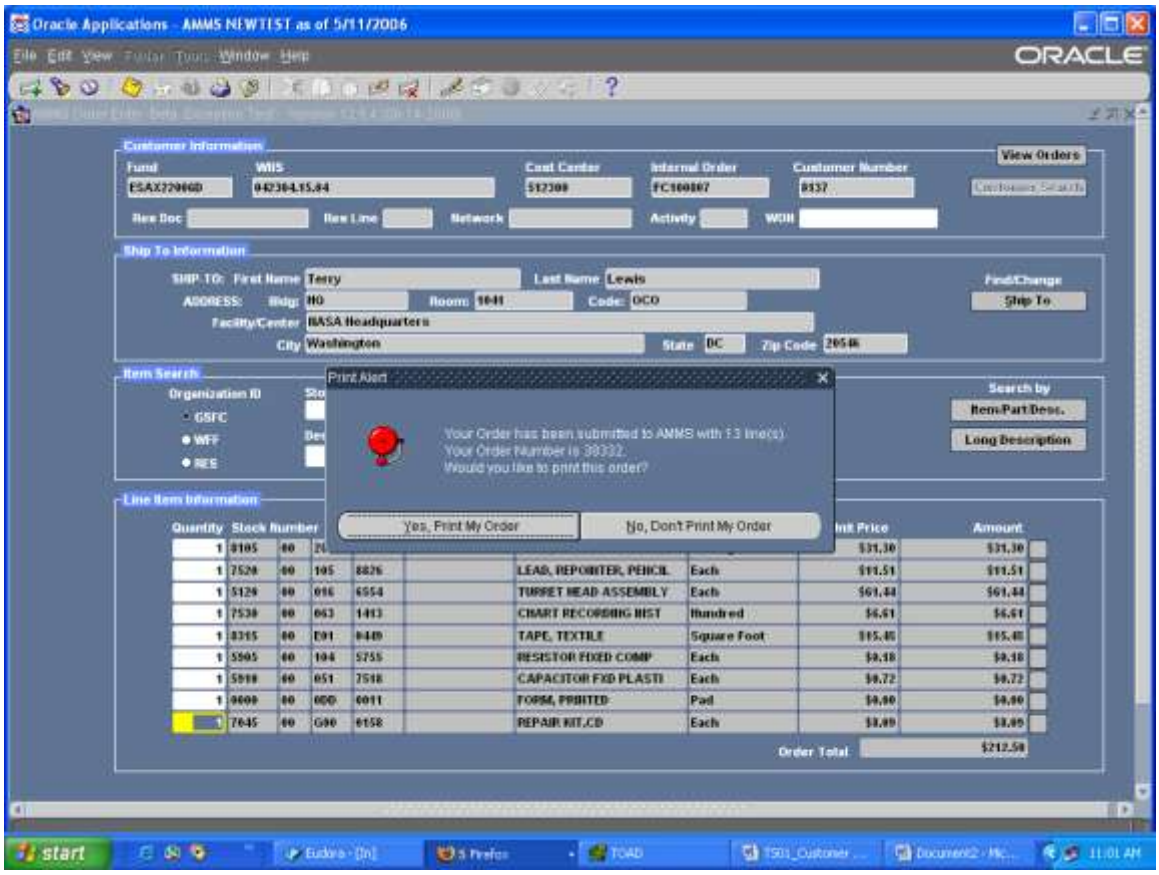
3. Once you have entered all of your lines on the order click on the Yellow Diskette on the tool bar, this is the **Save** button. This will save your order, give you an order number and ask if you would like to print your order.



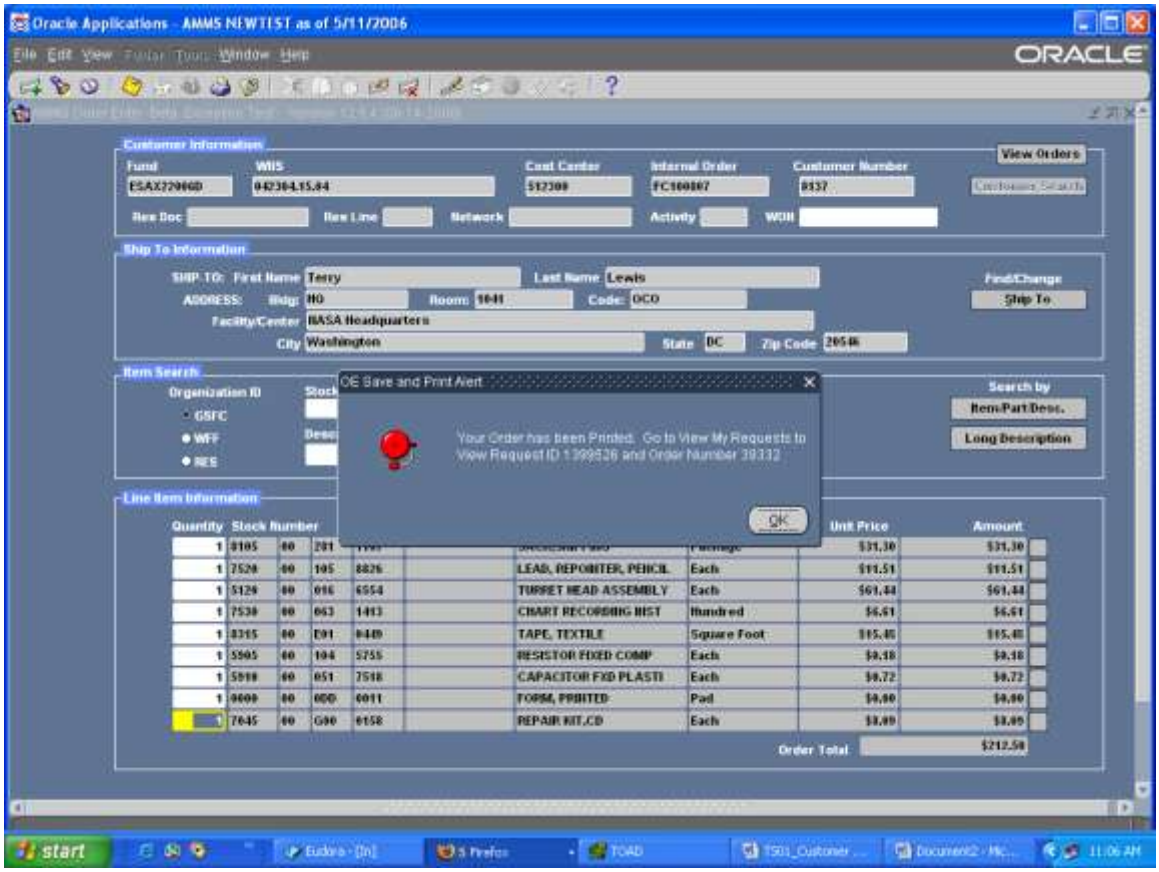
4. You will receive an OE Print Alert window, telling you your order has been submitted to AMMS, the number of line items, your Order Number, and asking “Would you like to print this order?”

   A. If you click “Yes, Print my Order”, you will receive another OE Alert

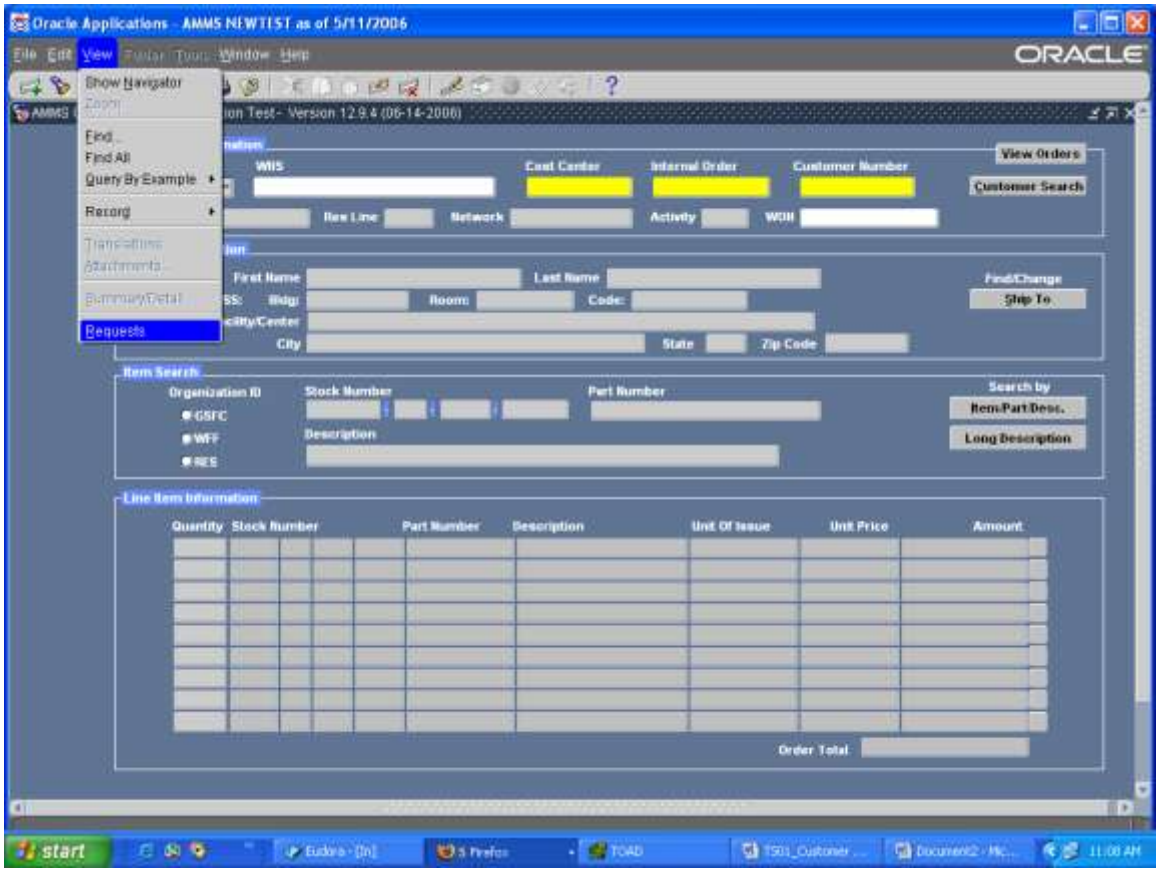
   B. If you click “No, Don’t Print my Order”, you order will still be submitted for processing but not be printed. You will have to contact the AMMS Help Desk at 6-2525 to print your order.



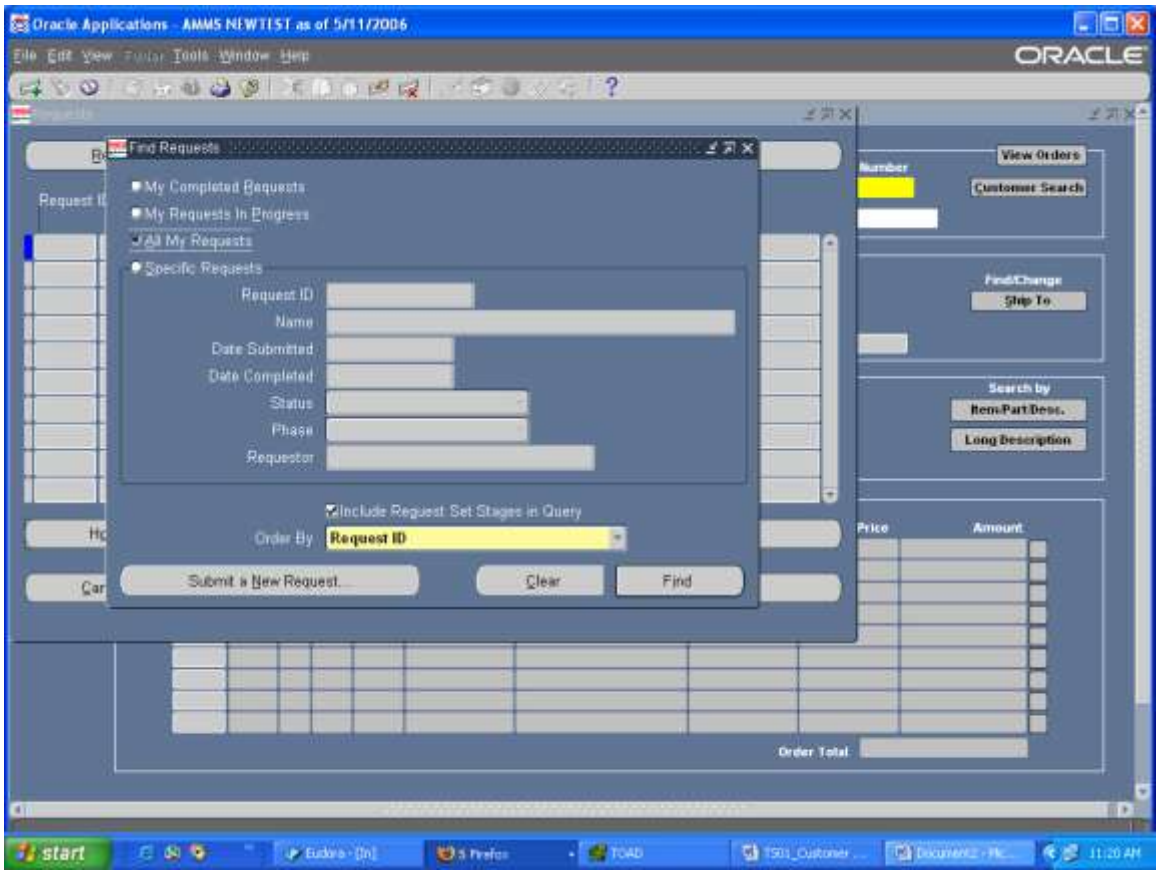
3. If you click “Yes, Print my Order” you will receive an OE Save and Print Alert, telling you your order has been printed, and to go to View Requests to view your order.



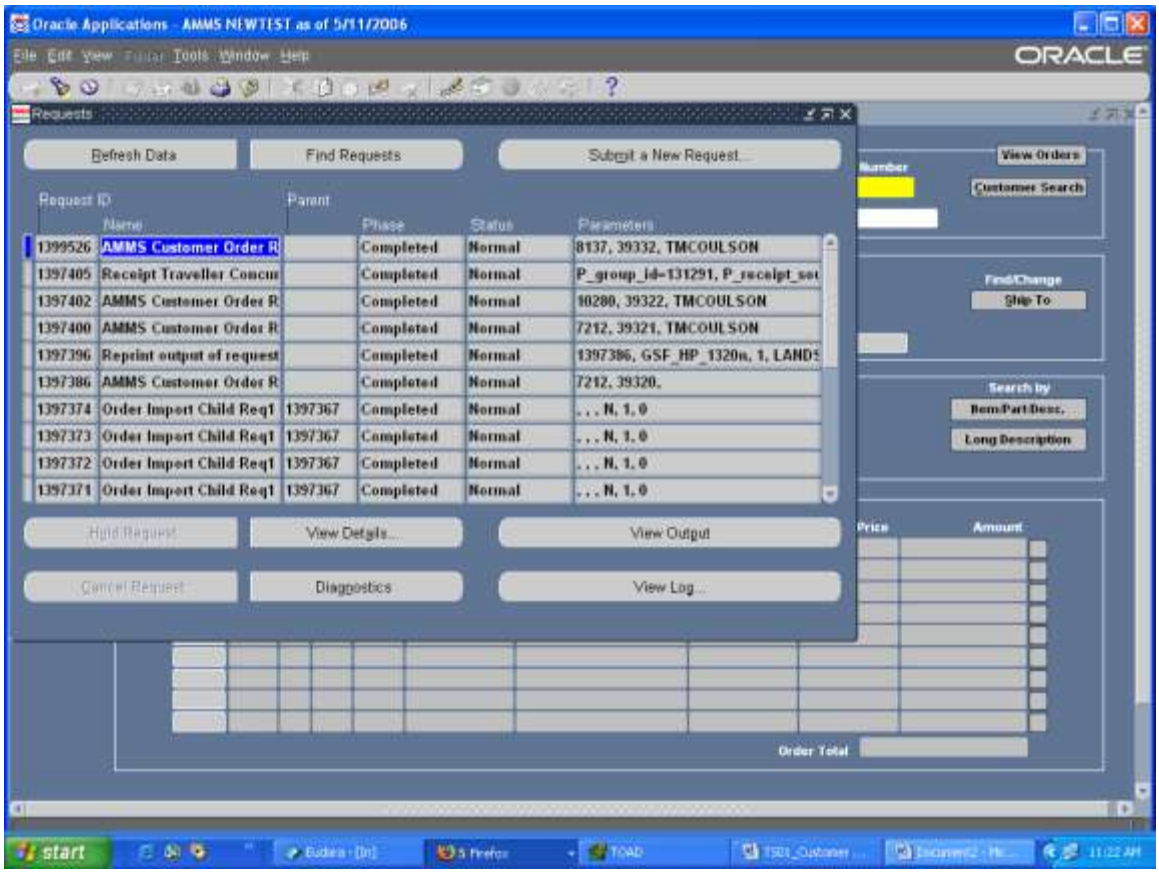
4. Click OK to the OE Save and Print Alert, your form will go blank. From the Toolbar select View, then select Requests



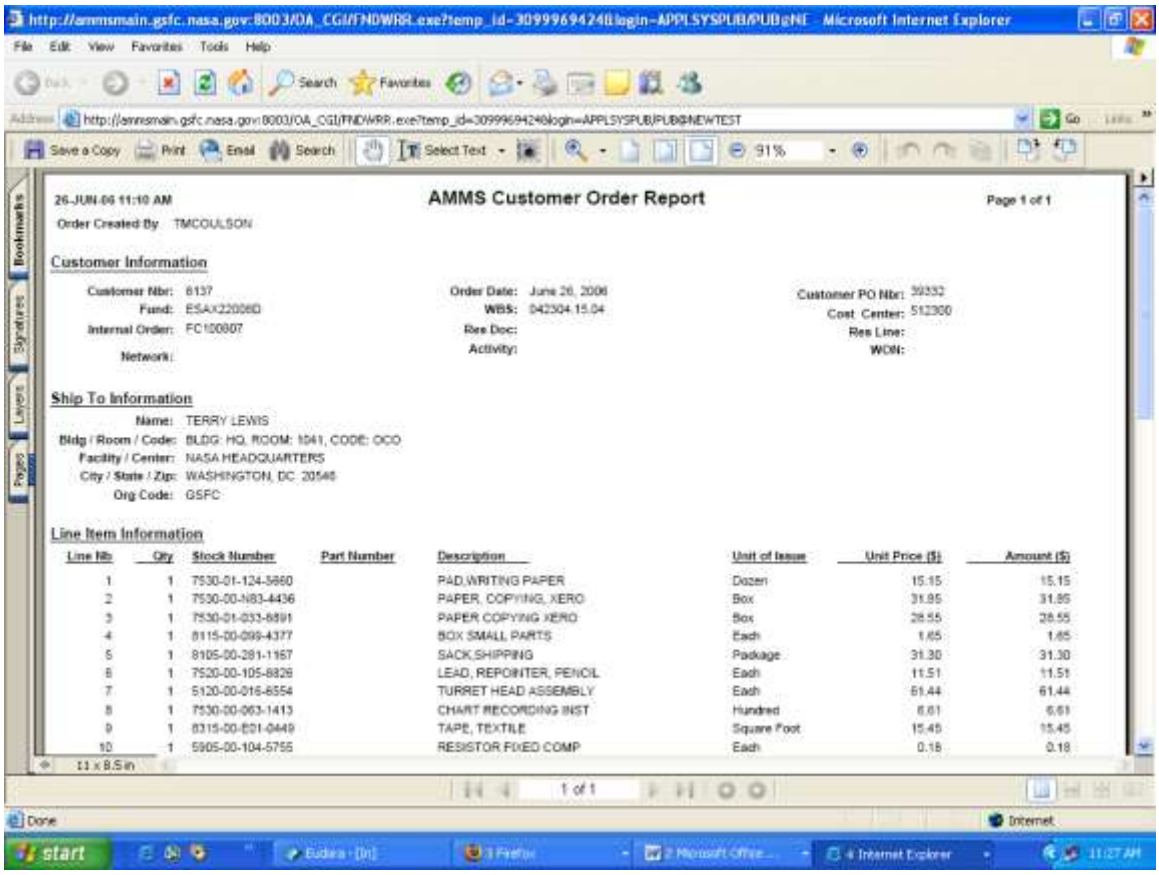
5. The Find Requests window will appear, make sure the “All my Requests” is selected, click on the Find Button



6. You are looking for the AMMS Customer Order Report. To the right on each line, you will see your Customer Number, AMMS Number and your name. Make sure that the line indicator is on the line you want to print, if not, click on the order you want to print, click on the View Output button



7. Adobe Acrobat will open with the AMMS Customer Order Report for the selected order.



26-JUN-06 11:10 AM

Order Created By: TMCOULSON

AMMS Customer Order Report

Page 1 of 1

Customer Information

Customer Nbr: 6137
Fund: ESAX22006D
Internal Order: FC100807
Network:

Order Date: June 26, 2006
WBS: 042304.15.04
Res Doc:
Activity:

Customer PO Nbr: 39332
Cost Center: 512300
Res Line:
WON:

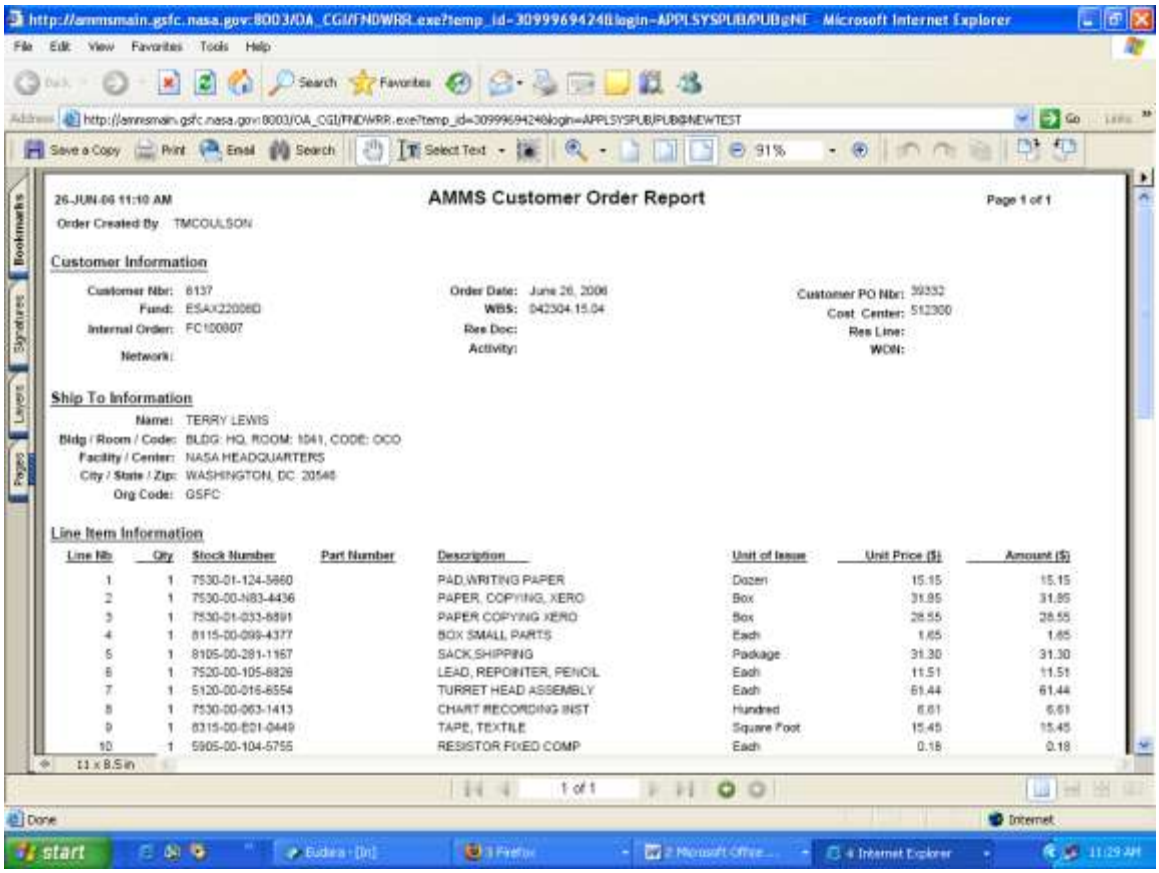
Ship To Information

Name: TERRY LEWIS
Bldg / Room / Code: BLDG: HQ, ROOM: 1041, CODE: OCO
Facility / Center: NASA HEADQUARTERS
City / State / Zip: WASHINGTON, DC 20546
Org Code: GSFC

Line Item Information

Line Nb	Qty	Stock Number	Part Number	Description	Unit of Issue	Unit Price ($)	Amount ($)
1	1	7530-01-124-5860		PAD,WRITING PAPER	Dozen	15.15	15.15
2	1	7530-00-N83-4436		PAPER, COPYING, XERO	Box	31.85	31.85
3	1	7530-01-033-8891		PAPER COPYING XERO	Box	28.55	28.55
4	1	8115-00-099-4377		BOX SMALL PARTS	Each	1.65	1.65
5	1	8105-00-281-1167		SACK,SHIPPING	Package	31.30	31.30
6	1	7520-00-105-8826		LEAD, REPOINTER, PENCIL	Each	11.51	11.51
7	1	5120-00-016-8554		TURRET HEAD ASSEMBLY	Each	61.44	61.44
8	1	7530-00-063-1413		CHART RECORDING INST	Hundred	6.61	6.61
9	1	8315-00-E01-0449		TAPE, TEXTILE	Square Foot	15.45	15.45
10	1	5905-00-104-5755		RESISTOR FIXED COMP	Each	0.18	0.18

8. From this page you can either print your order, or save it to your desktop. To print the order click on the "Print", to Save the order click "Save a Copy", and save to your documents. You can open the saved order at anytime to print it.



AMMS TRAINING SCRIPT

Entering Customer Orders Using Financial Strings

Purpose

The purpose of this training script is to explain how to enter orders in AMMS using the SAP Financial Strings

Audience

AMMS Users

Prepared By	Theresa Coulson, Rob Amos, Mike Hopper
Creation Date:	10/11/2005
Document Name	TS02_Financial String.doc
Version	2
Last Updated:	11/23/2008
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\Misc\.	

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Summary of Changes

This training document will walk you through the process of entering an order in the AMMS Order Entry form when using the SAP Financial String information (Fund, WBS, Cost Center, Internal Order, Reservation Document, and Reservation Line Number).

For the 2006 Fiscal Year, several changes were required for the AMMS Order Entry System. These changes include:

- Financial string input fields Fund, WBS, Cost Center, and Internal Order were re-arranged on the Order Entry form.
- The JON input field was removed; you may no longer lookup customers using a JON number.
- Searches may be done by existing customer numbers or by specifying the complete Fund, WBS, Cost Center, and Internal Order financial string.
- Financial string input fields Reservation Document Number and Reservation Document Line were added. These financial string fields are required when using reimbursable or working capital financial strings
- Financial string fields Network Address (Network) and Network Activity (Activity) were added for future use. These fields are not active on the form.
- The existing Work Order field (WON) was increased from 7 characters to 20 characters. This change allows a user to specify longer project identifiers.
- Most financial string field values can be searched using “Lists of Values” (LOV) pull-down lists
- Inactive customer numbers are now flagged preventing orders from being placed using out-dated financial strings.
- New and enhanced informational alerts and error messages for fields and functions.

Task 1: Accessing the AMMS Order Entry System

This section will describe how to access the AMMS Oracle system and log in using your AMMS userid and password. If you are not currently enrolled as an AMMS user, you must contact AMMS Helpdesk at 301-286-2525 or send an e-mail to Tabatha Luskey at Tabatha.L.Luskey.1@gsfc nasa.gov.

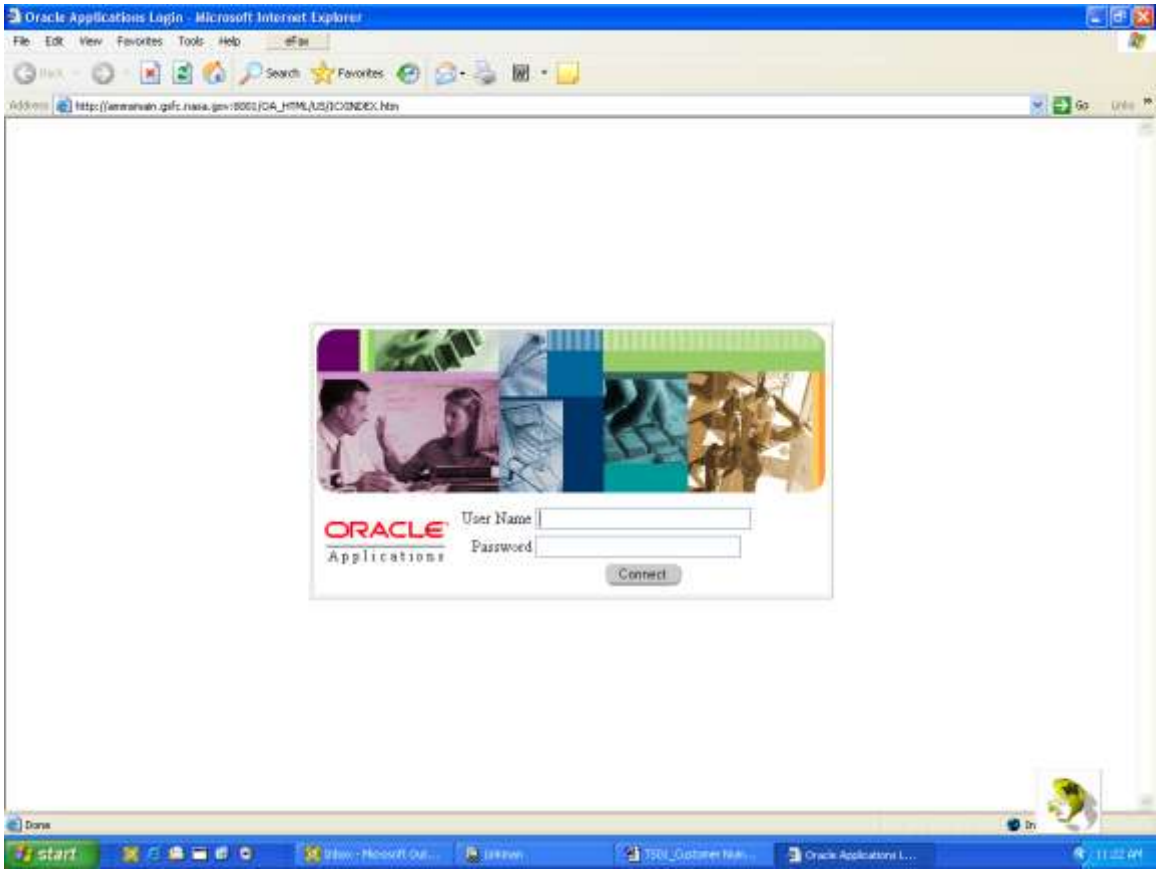
More information on the AMMS System is available on the AMMS web site http://amms/

Step 1A: Access the AMMS System Web Site

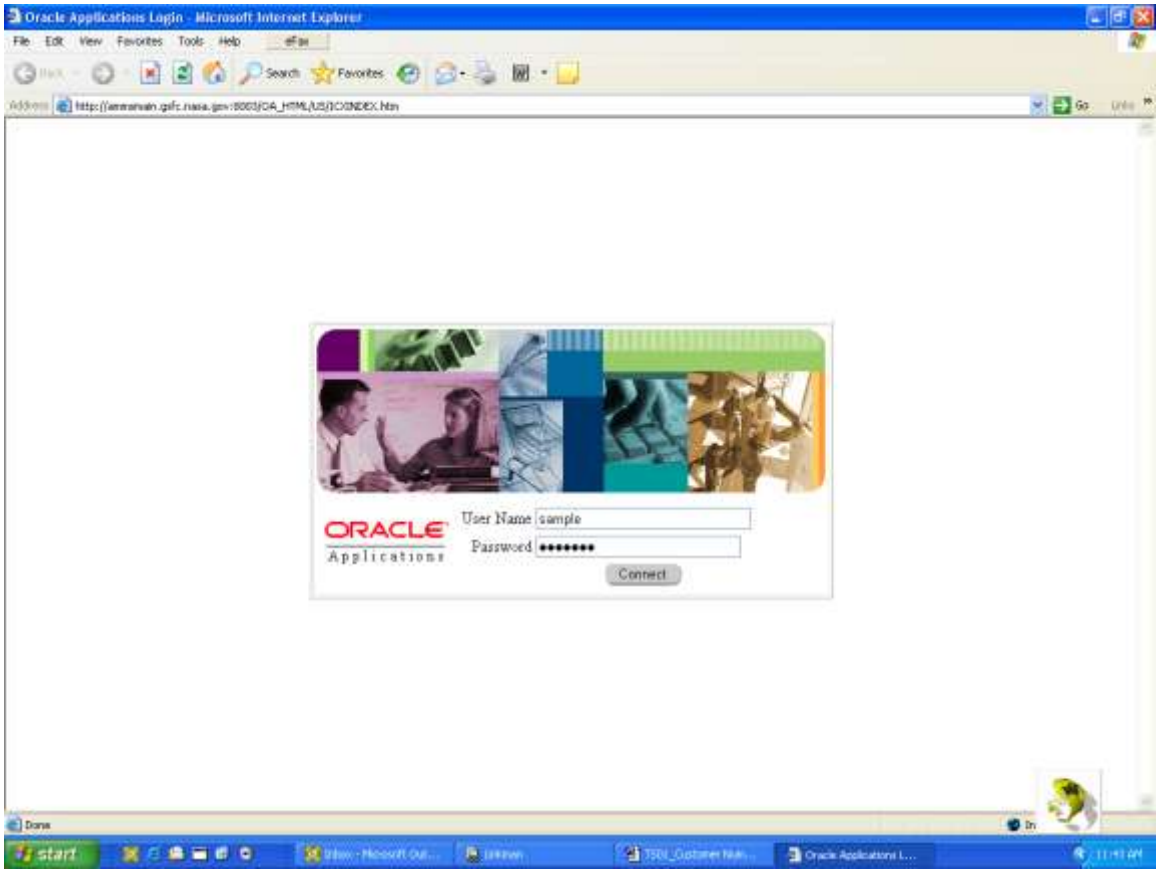
4. From your web browser, enter the following URL to access the AMMS system:

   http://ammsmain.gsfc nasa.gov:8001/OA_HTML/US/ICXINDEX htm

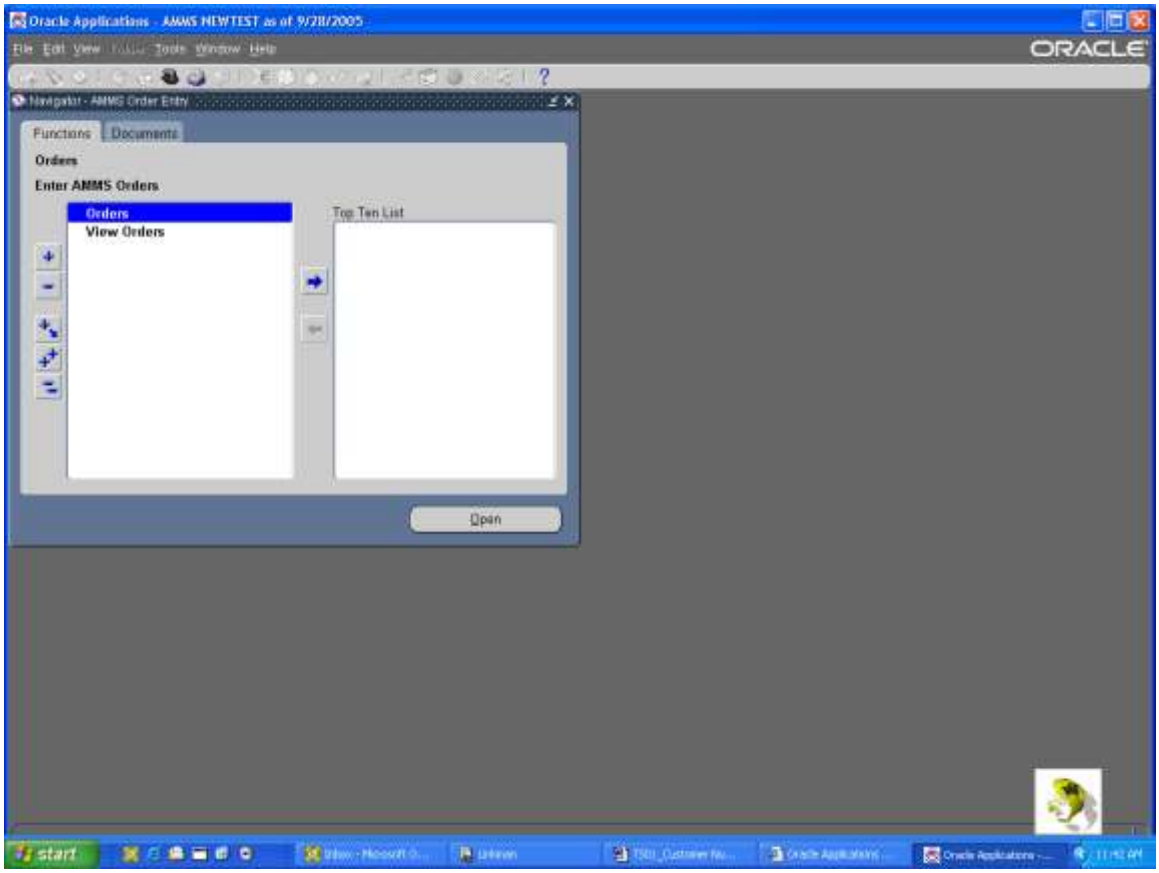
   The following screen should appear:



5. Enter your AMMS userid and password in the fields on the screen and then click on the **Connect** button. Note, your password will not display in text but will display as asterisks (*).



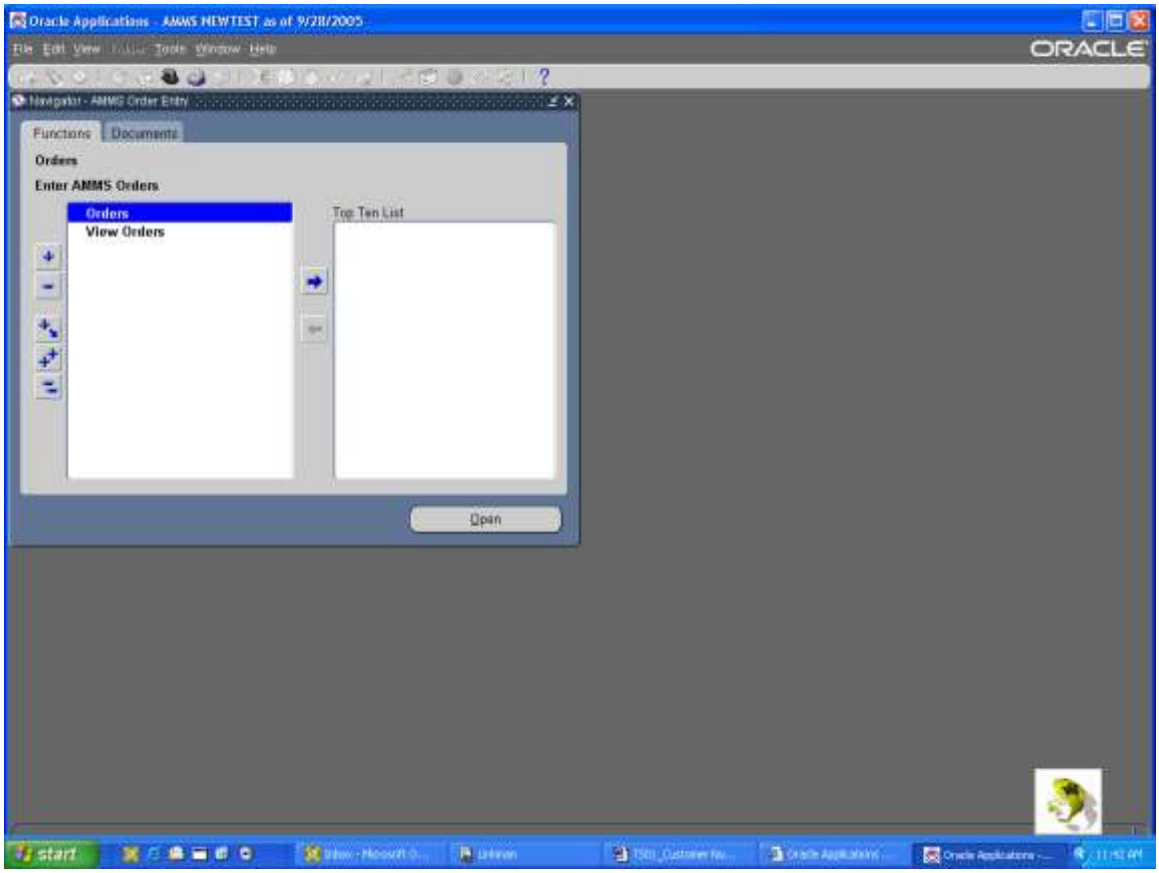
6. The AMMS Function menu will appear:



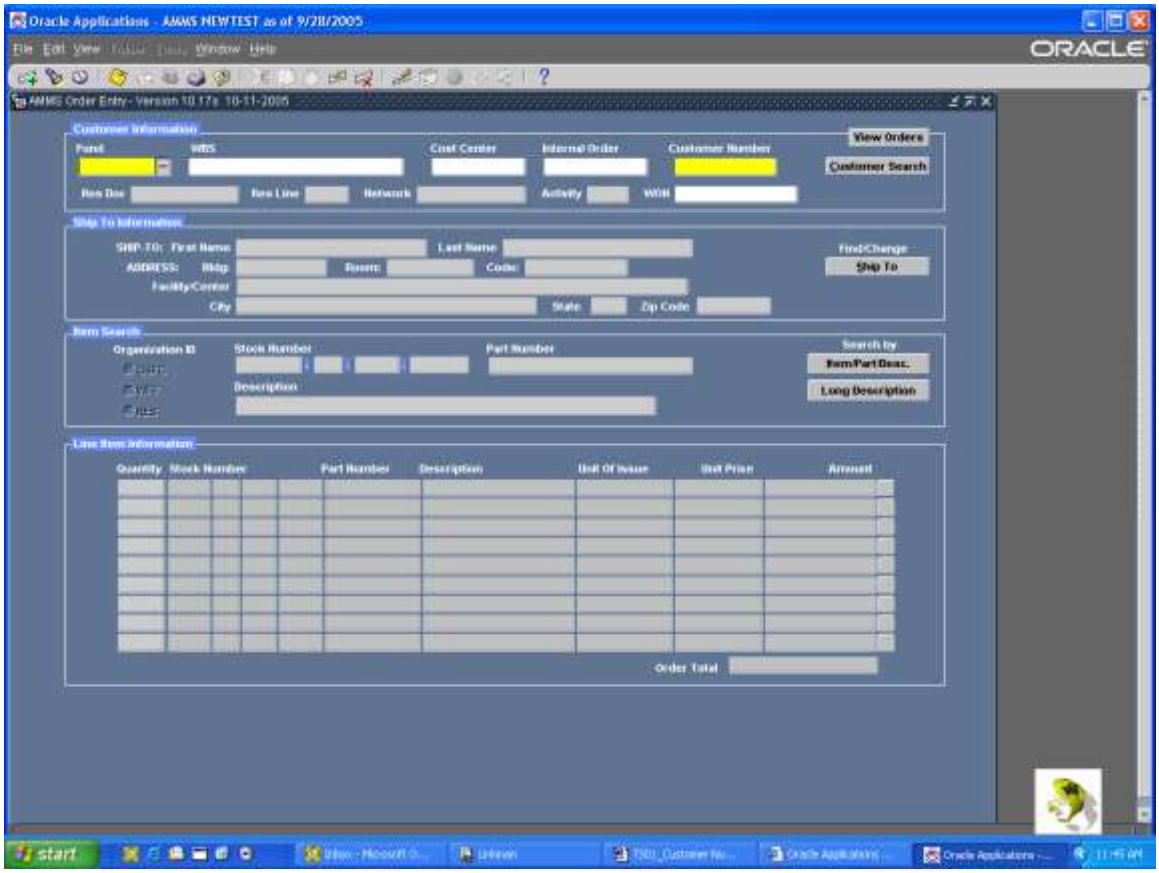
Step 1B: Navigating to the AMMS Order Entry Screen

Once you have successfully accessed the AMMS system and the list of available functions are displayed, you are ready to navigate to the AMMS Order Entry screen.

4. The AMMS function menu should appear:



5. Click on **Orders** to highlight it and then press **Open** to go to the AMMS Order Entry screen. The following screen should appear:



6. You are now ready to begin placing orders in the AMMS Order Entry form

Task 2: Entering AMMS Orders Using the SAP Financial String

There are two methods of entering orders for a customer in the AMMS Order Entry form:

3. Enter a active Customer Number
4. Enter in the full SAP financial string

This section discusses how to enter an order for a new customer by specifying the SAP Financial String information. The SAP Financial String consists of the Fund, WBS, Cost Center, Internal Order, and optionally the Reservation Document and Reservation Line Number. The Reservation Document and Reservation Line Number are required when using a reimbursable or working capital fund.

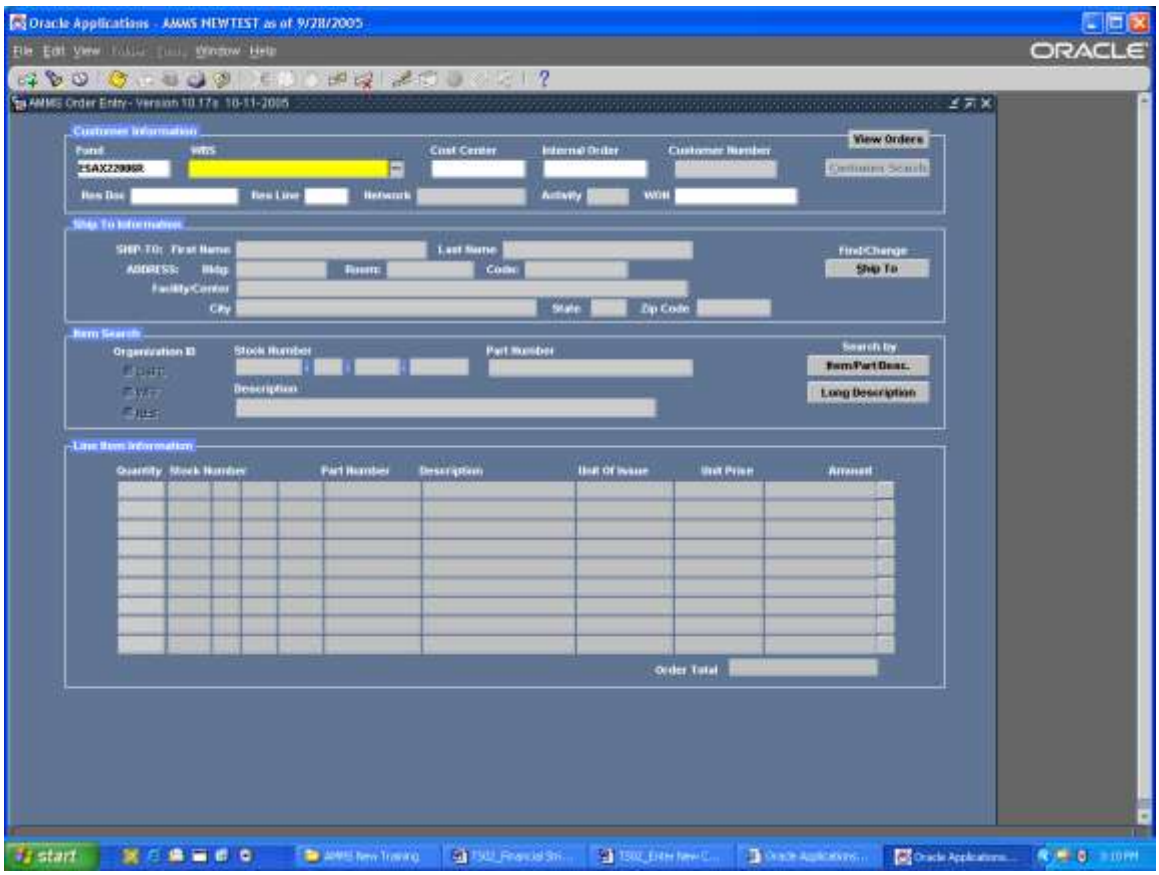
Note: *An "active customer" is an AMMS defined customer who is assigned a valid FY05 or FY06 SAP financial string. Customers from previous years or who no longer have funding are marked "inactive" in the AMMS system and may not order additional supplies.*

Step 2A: Entering a Fund

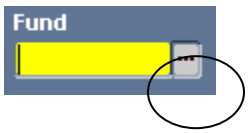
Specifying the Fund

If you know the specific Fund for the customer, then you can enter it directly in the AMMS Order Entry form:

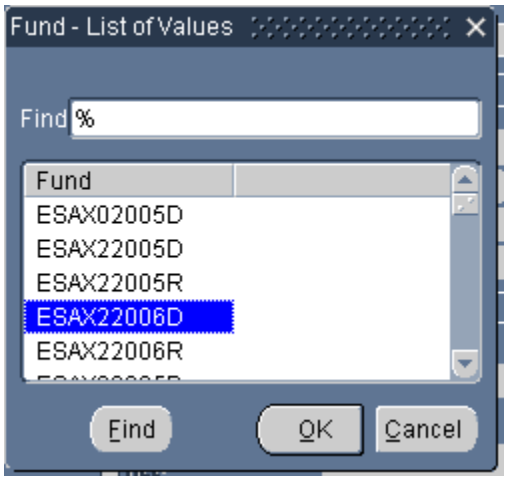
5. Enter the specific Fund in **Fund** field.



6. If you don't know the specific Fund number, click on the drop down button on the right side of the field and a listing of Funds will appear.

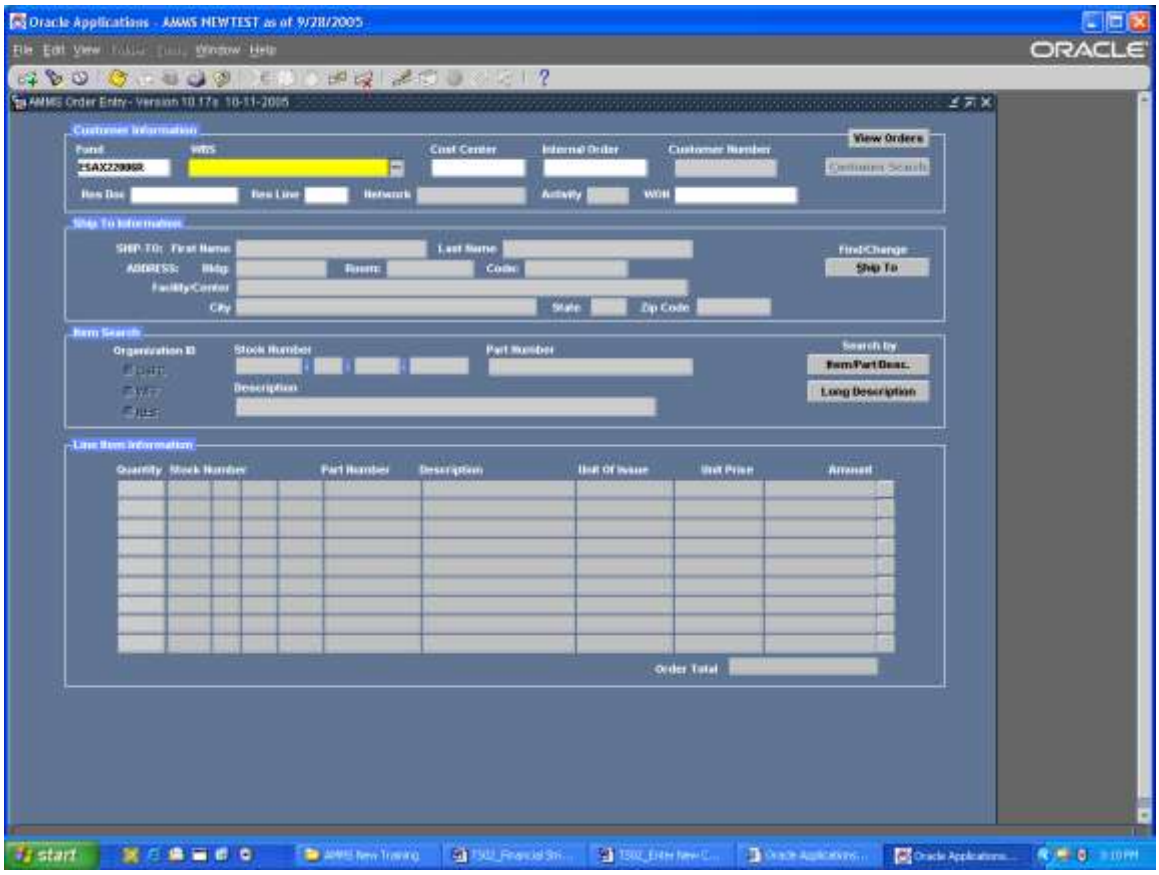


7. If using the List of Values, scroll down until you see your fund and click on the line to select it. To shorten the List of Values, type the first few characters in the Find line before the '%'.



8. Click **Ok**.

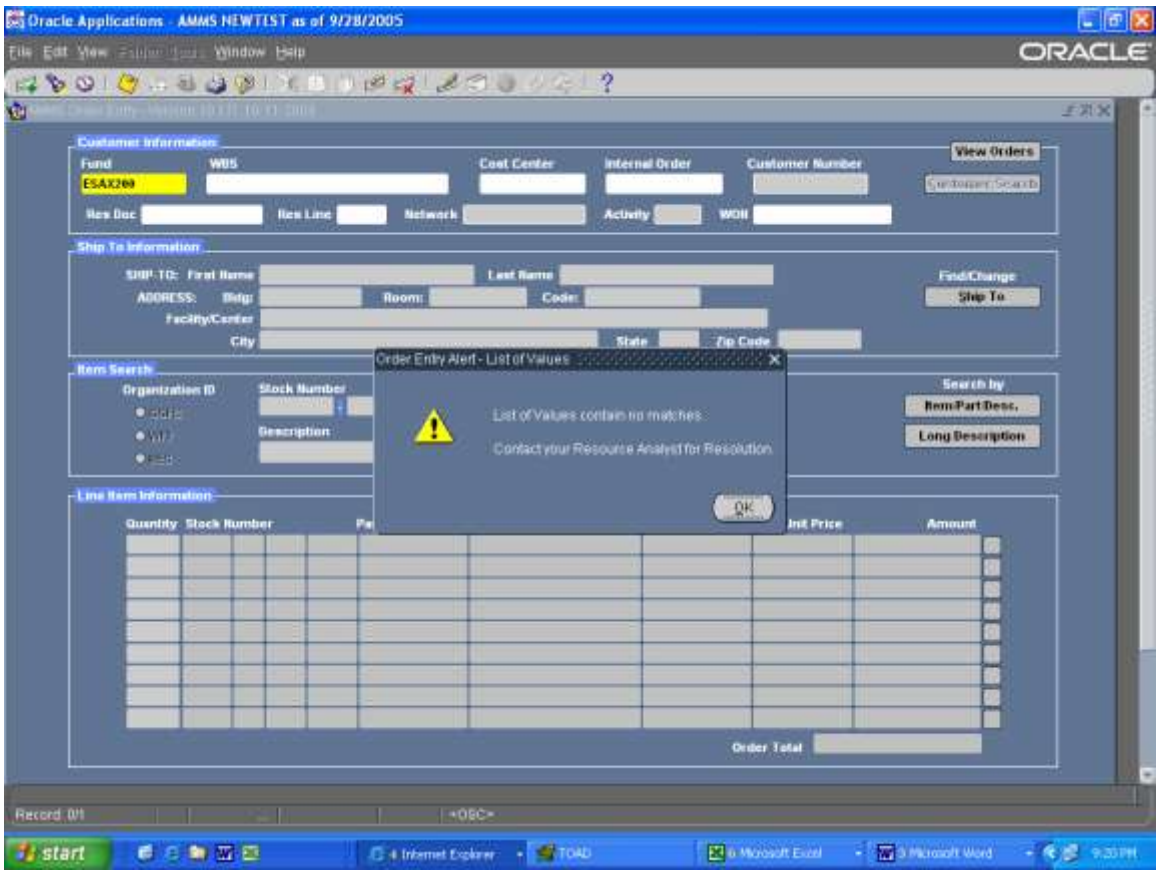
9. The Fund number will be accepted and the cursor will move to the WBS field, which is now highlighted in yellow.



Common Error Messages For Fund Entry

Invalid Fund Number

1. If the Fund number is not valid, this Order Entry Alert will appear:

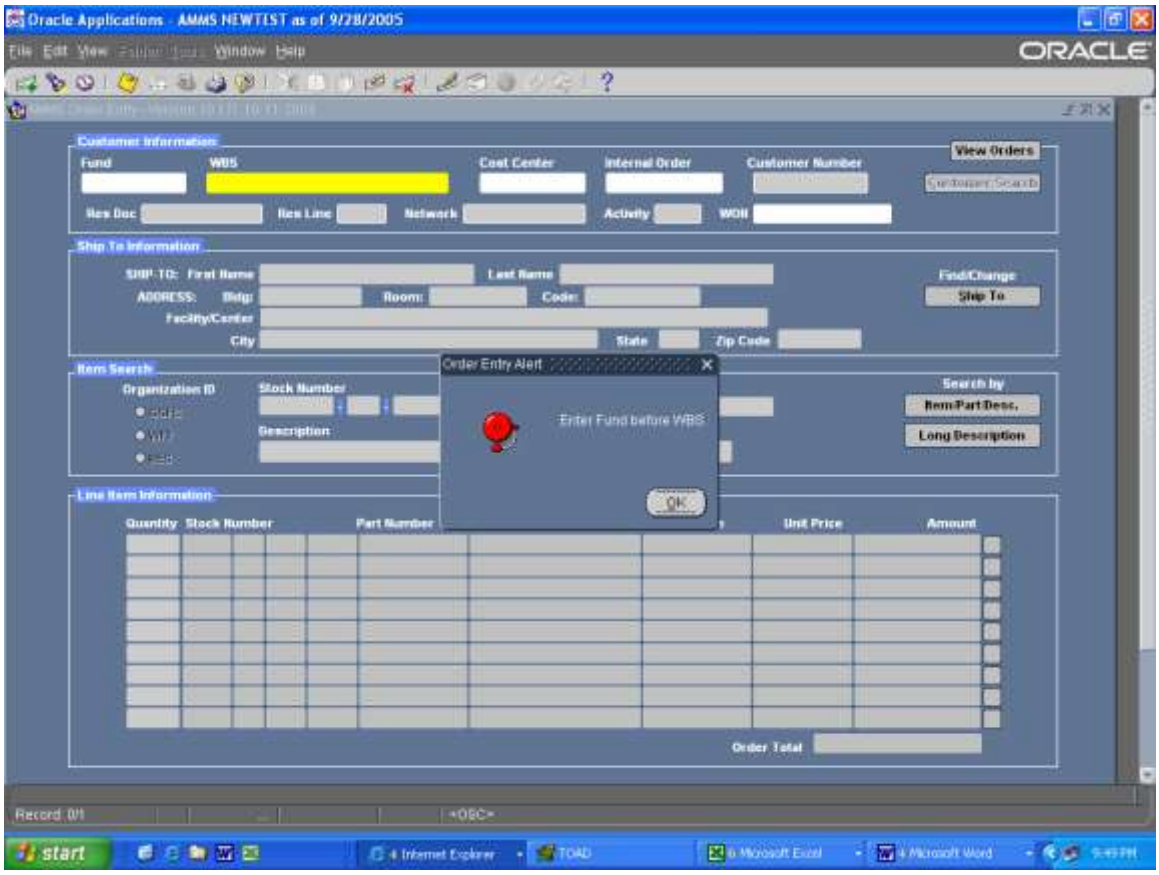


2. Click the **OK** button and you will be returned to a blank form.

3. If your entry was a typographical error, try again or use the List of Values button as described on the previously.

Entering the WBS First

1. Trying to enter a WBS without entering a Fund first:



2. Click **OK** to clear the alert window and you are returned to the Fund field.

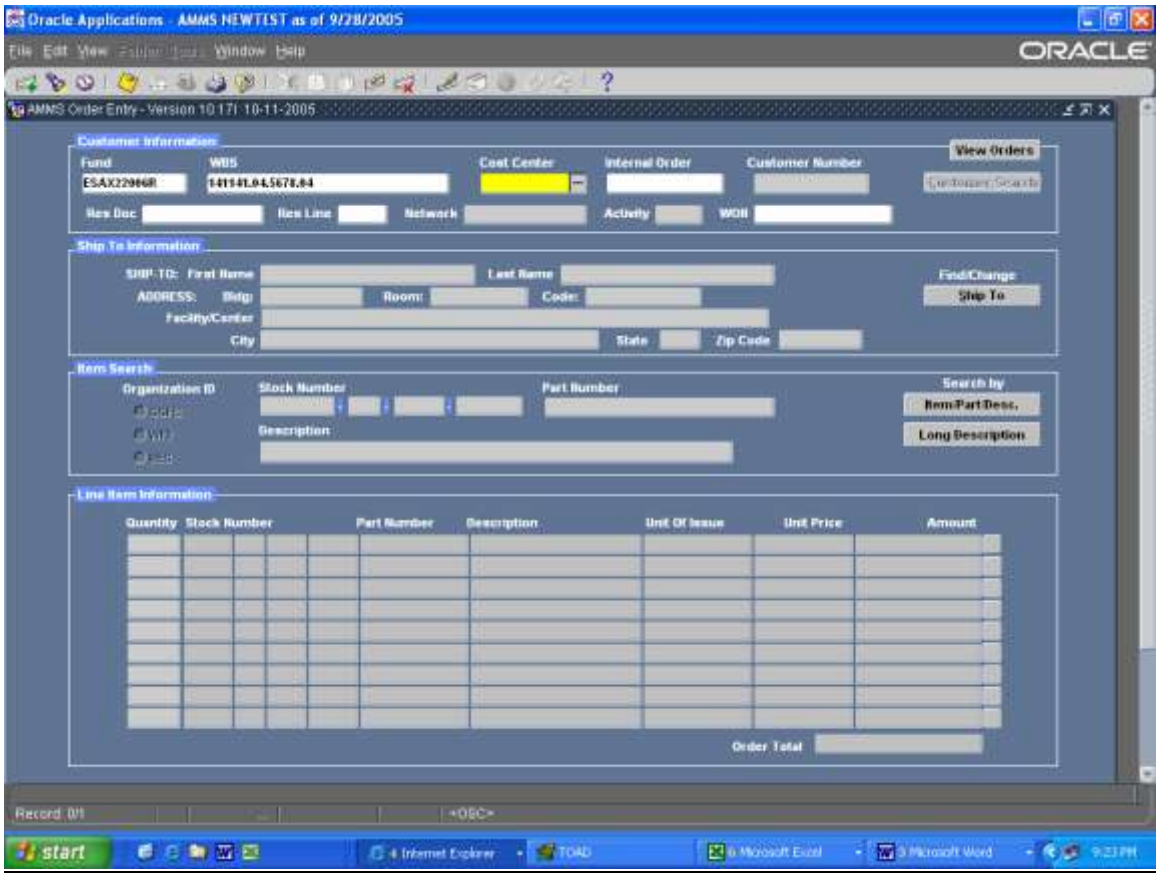
Step 2B: Entering the WBS

Not all financial strings require a WBS. If you are using Pool Money from FY2005, a WBS is not required; otherwise you will have a WBS as part of your financial string.

If you do not need to enter a WBS number (Pool money and FY2005 or before), proceed to *Step 2C Entering the Cost Center*.

Specifying the WBS

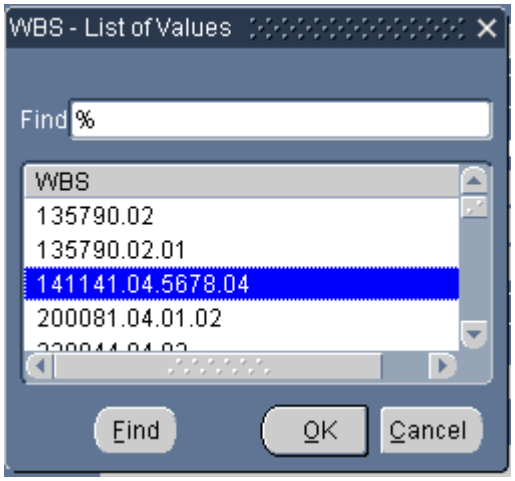
1. Enter the specific WBS in the **WBS** field.



2. If you don't know the specific WBS number, click on the drop down button on the right side of the field and a listing of WBSs will appear.

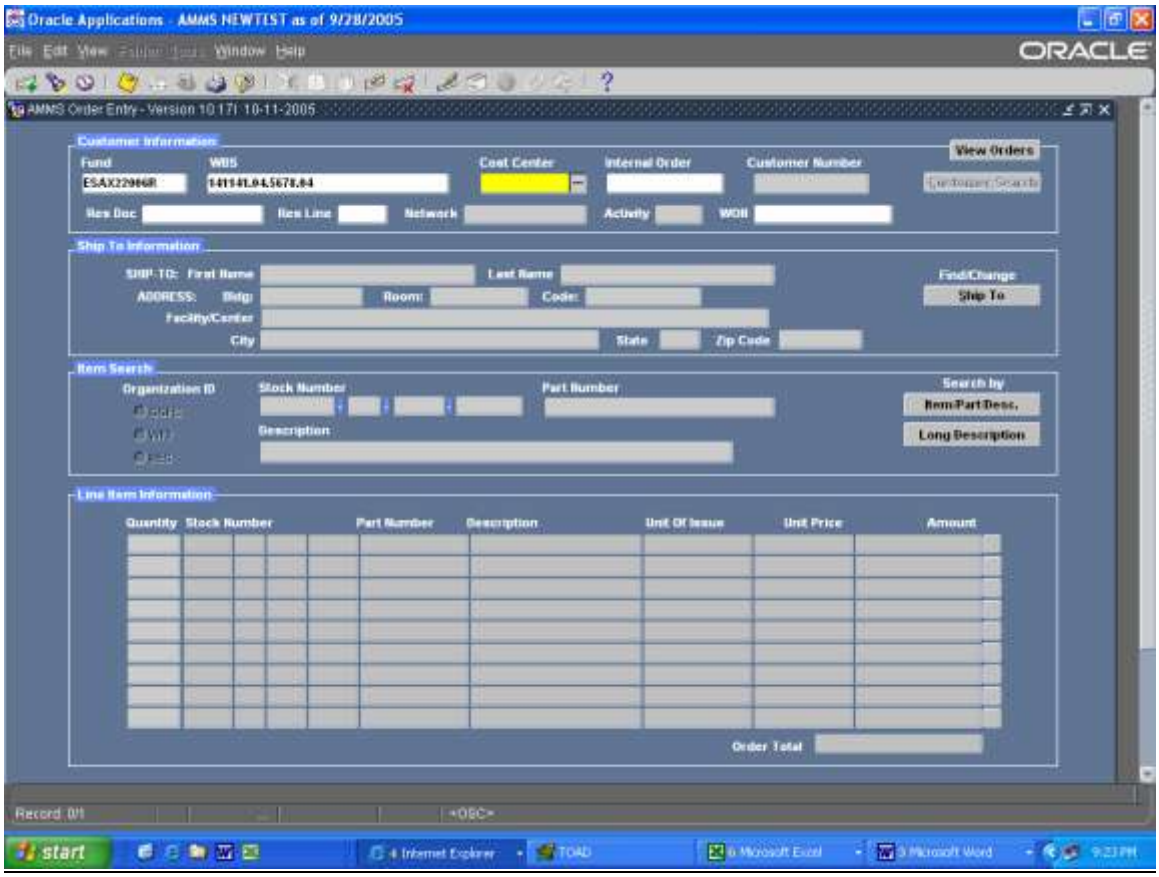
3. If using the List of Values, scroll down until you see the WBS and click on the line to select it. To shorten the List of Values, type the first few characters in the Find line before the '%'.

Note: *this can be a very long list, it is best to enter at least a part of the WBS number to shorten the list.*



4. Click **Ok**.

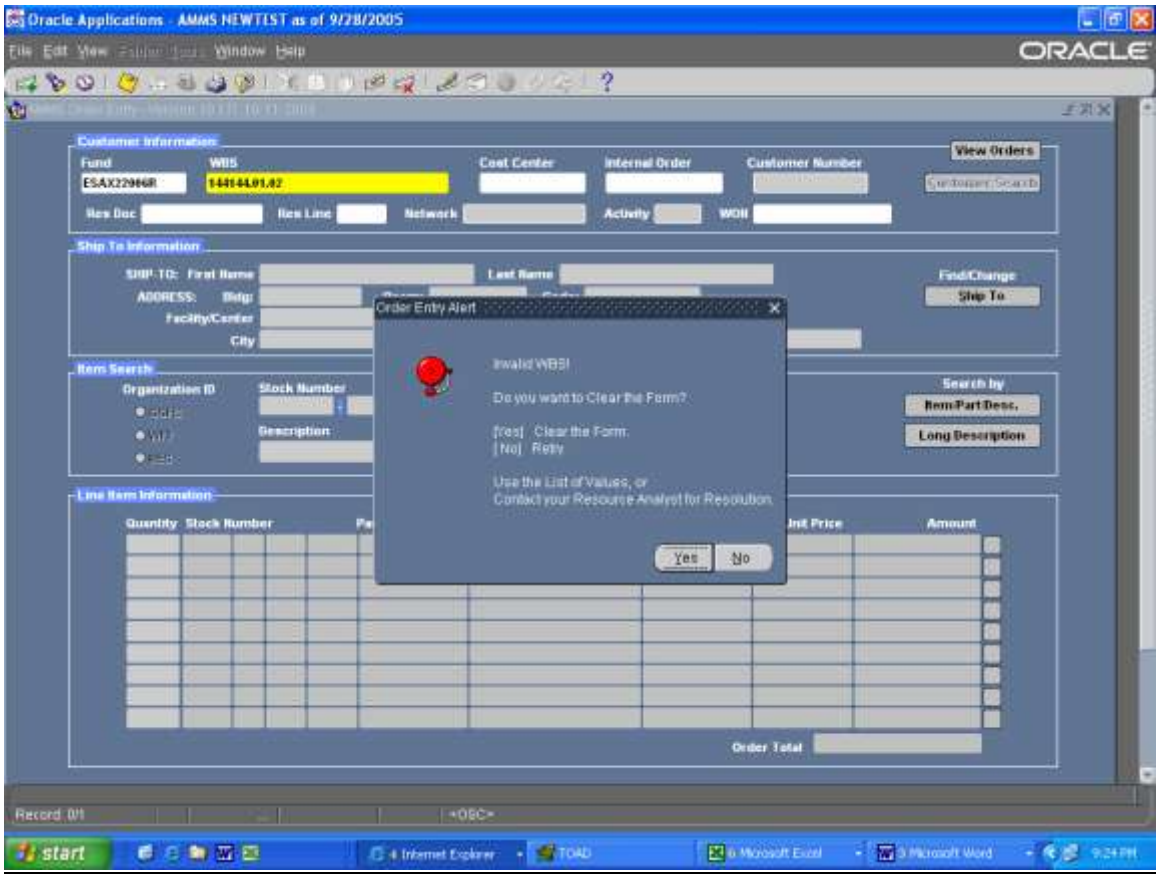
5. The WBS number will be accepted and the cursor will move to the Cost Center field, which is now highlighted in yellow.



Common Error Messages for WBS Entry

Invalid WBS Number

1. If you enter a WBS number without using the List of Values and it is not valid, this Order Entry Alert will appear:

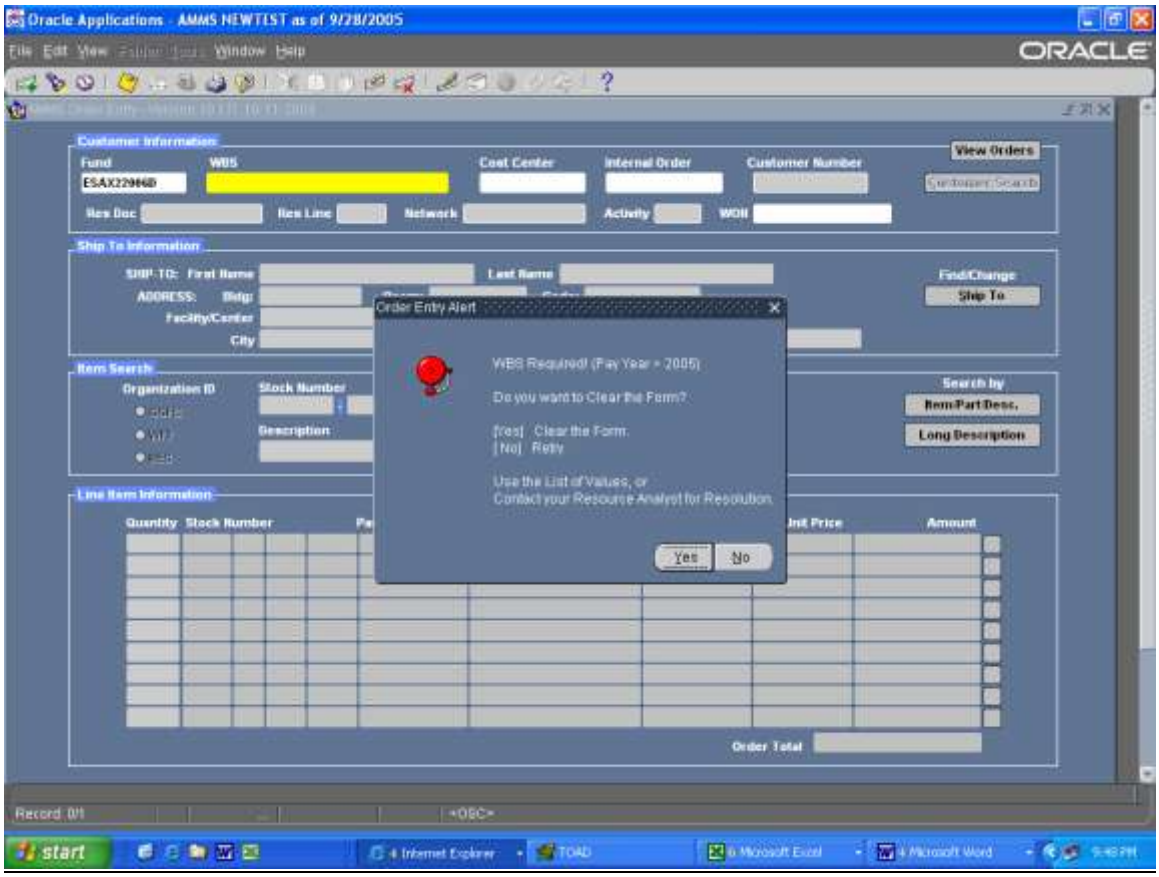


2. If you mistyped the WBS number, click the No button in the alert window. You will be returned to a blank WBS field. You can try re-entering your number or select one from the List of Values.

3. If the you believe you entered a valid WBS, click the Yes button in the alert window and all the fields in the form will be cleared. You will need to resolve this entry with your Resource Analyst.

Required WBS Not Specified

1. You did not enter a WBS after entering a 2006 (and beyond) Fund and tried to move the cursor to the Cost Center field:



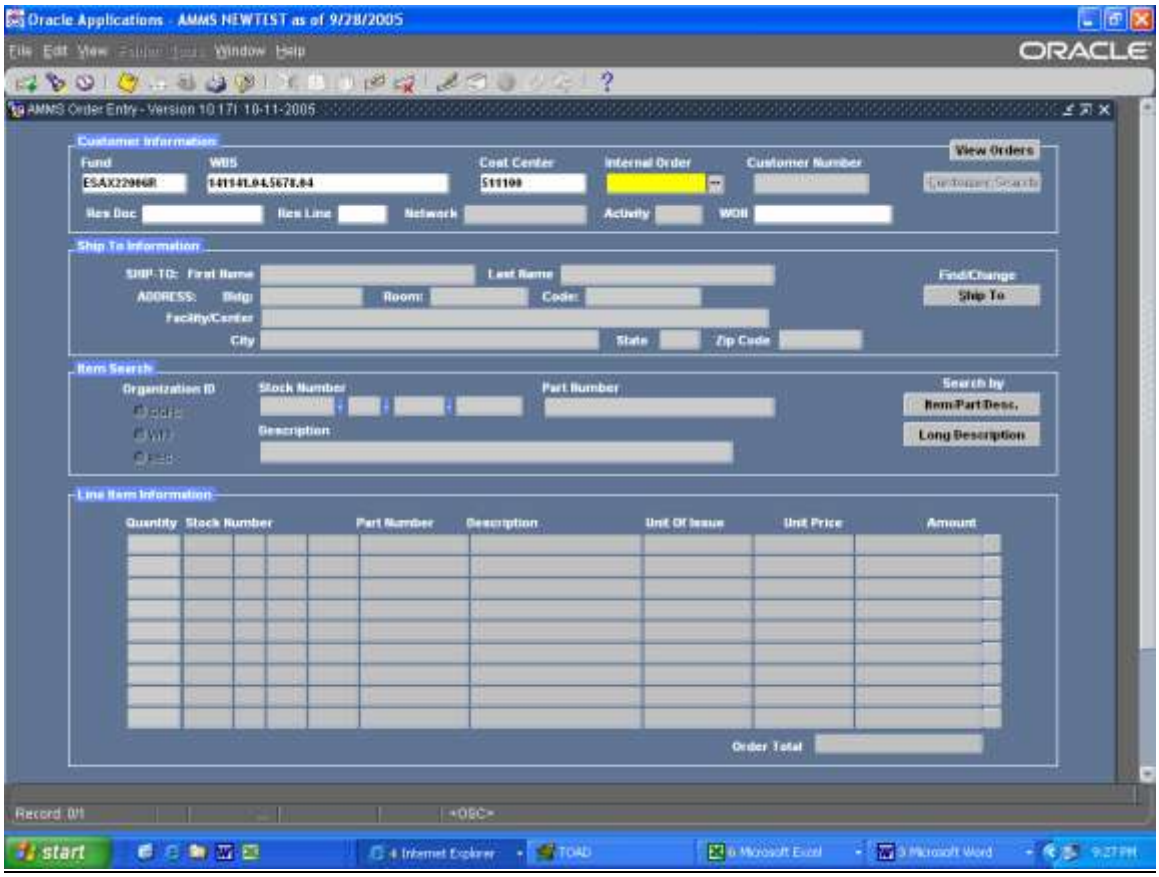
2. If you skipped past the WBS field by mistake, click the No button in the alert window and you will be returned to the WBS field so that you can enter a value.

3. If you meant to enter a Fund for 2005 or before, or believe there is some other problem, click Yes and all fields of the form will be cleared. If it is some other problem, you will need to work with your Resource Analyst to resolve it.

Step 2C: Entering Cost Center

Specifying the Cost Center

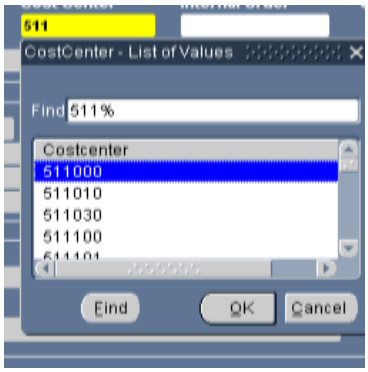
1. Enter the specific Cost Center in the **Cost Center** field:



2. If you don't know the specific Cost Center number, click on the drop down button ... on the right side of the field and a listing of Cost Centers will appear.

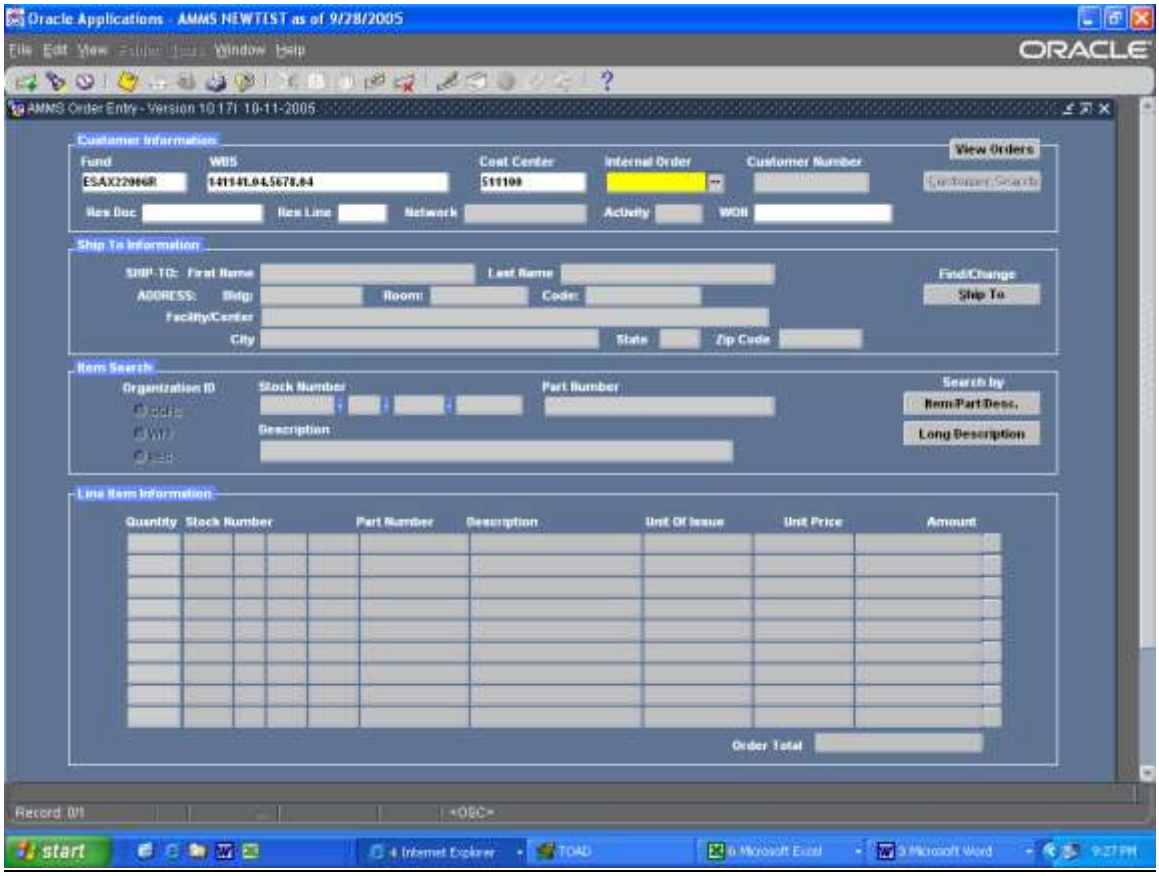
3. If using the List of Values, scroll down until you see the Cost Center and click on the line to select it. To shorten the List of Values, type the first few characters in the Find line before the '%'.

Note: *this can be a very long list, it is best to enter at least a part of the Cost Center number to shorten the list.*



4. Click **Ok**.

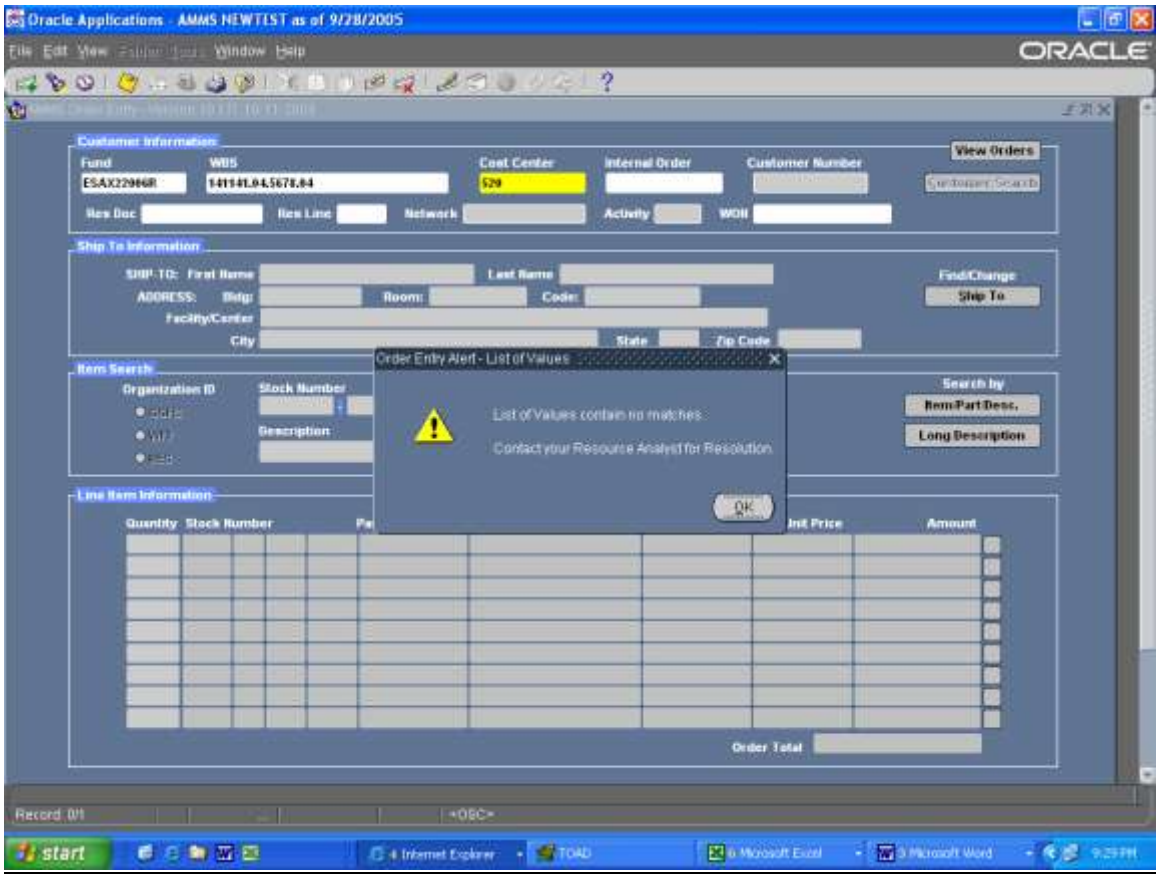
5. The Cost Center number will be accepted and the cursor will move to the Internal Order field, which is now highlighted in yellow.



Common Error Messages for Cost Center Entry

Invalid Cost Center

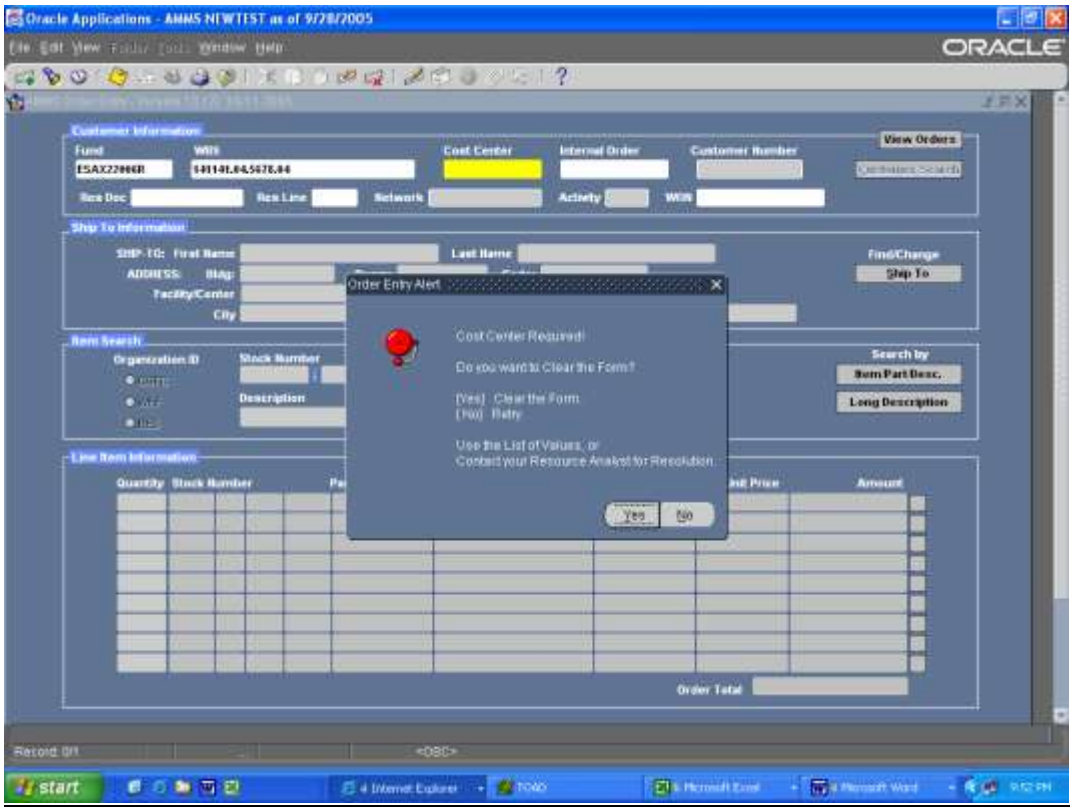
1. If you entered a Cost Center value with using the List of Values and it is not valid, this Order Entry Alert will appear:



2. Click the **OK** button in the alert window and you will be returned to a blank Cost Center field. If you believe the Cost Center you entered is valid, contact your Resource Analyst to resolve.

No Cost Center Specified

1. You moved the cursor to the Internal Order field without entering a Cost Center value:



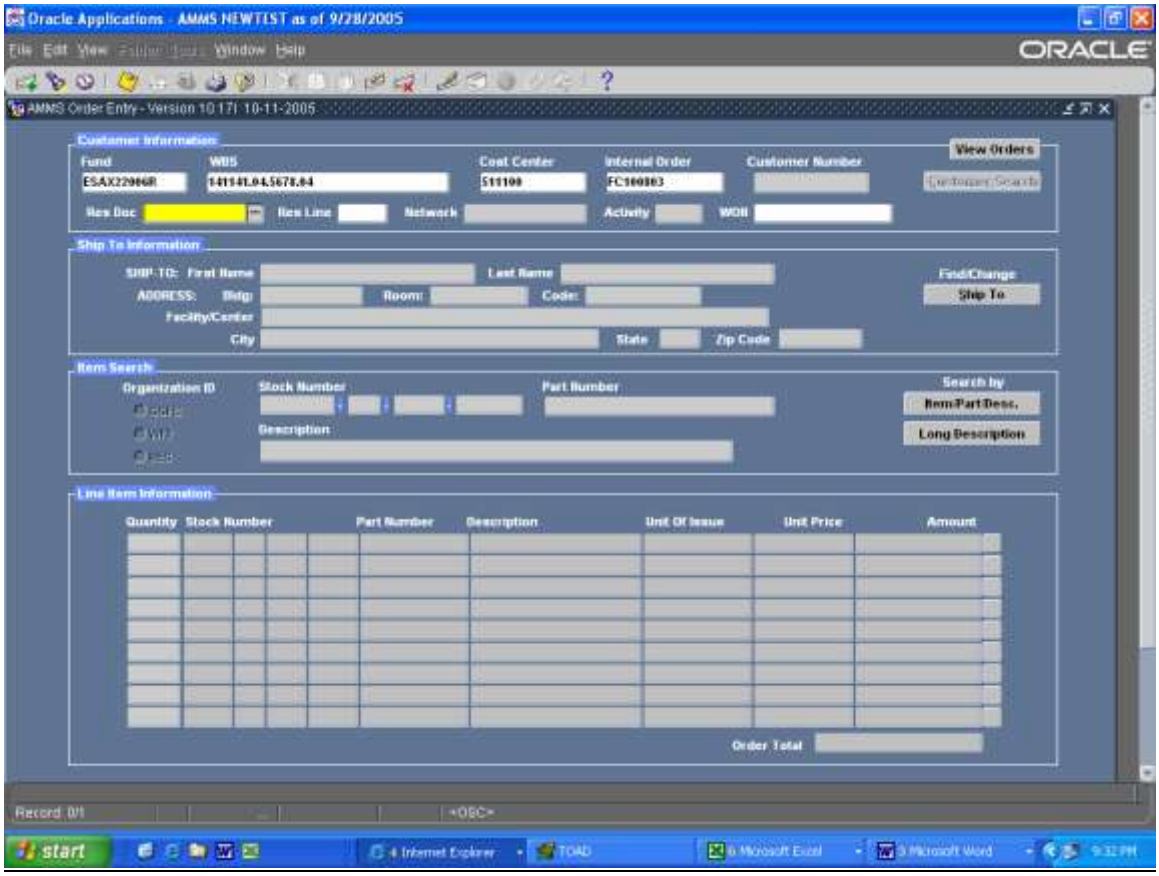
2. If you skipped the field by mistake, click the No button in the alert window. You will be returned to the Cost Center field and you can enter a value.

3. If there is some other problem, click the Yes button in the alert window. Contact your Resource Analyst to resolve the matter.

Step 2D: Enter Internal Order

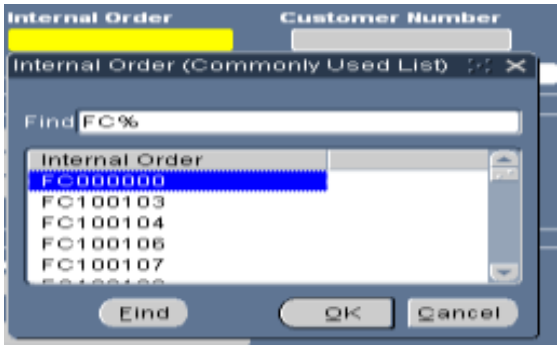
Specify an Internal Order

1. Enter the specific Internal Order in the **Internal Order** field:



2. If you don't know the specific Internal Order number, click on the drop down button on the right side of the field and a listing of Internal Orders will appear.

3. If using the List of Values, scroll down until you see your Internal Order and click on the line to select it, then click the OK button. To shorten the List of Values, type the first few characters in the Find line before the '%'.

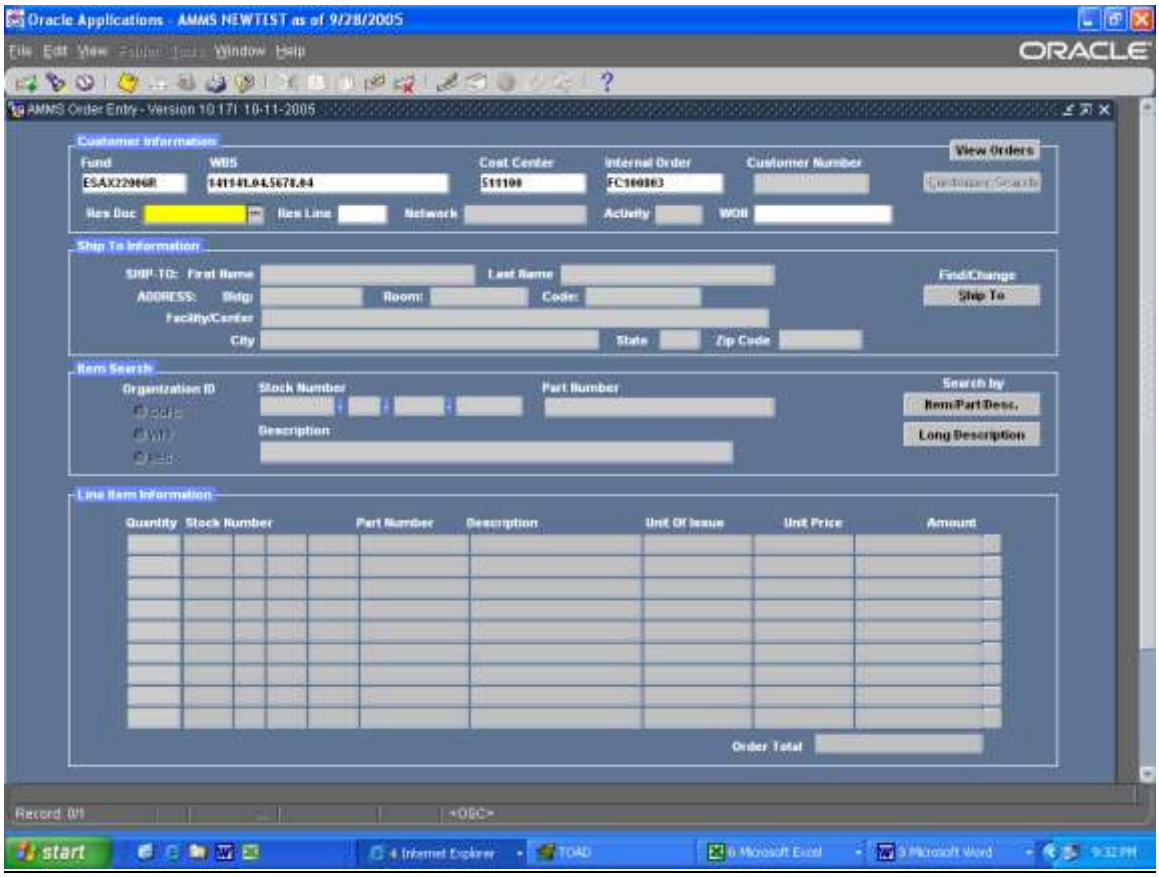


4. Click **Ok**.

5. The Internal Order number will be accepted.

   If a non-reimbursable fund has been entered in this string, the Customer Search button will become active. For non-reimbursable funds proceed to *Step 2G*.

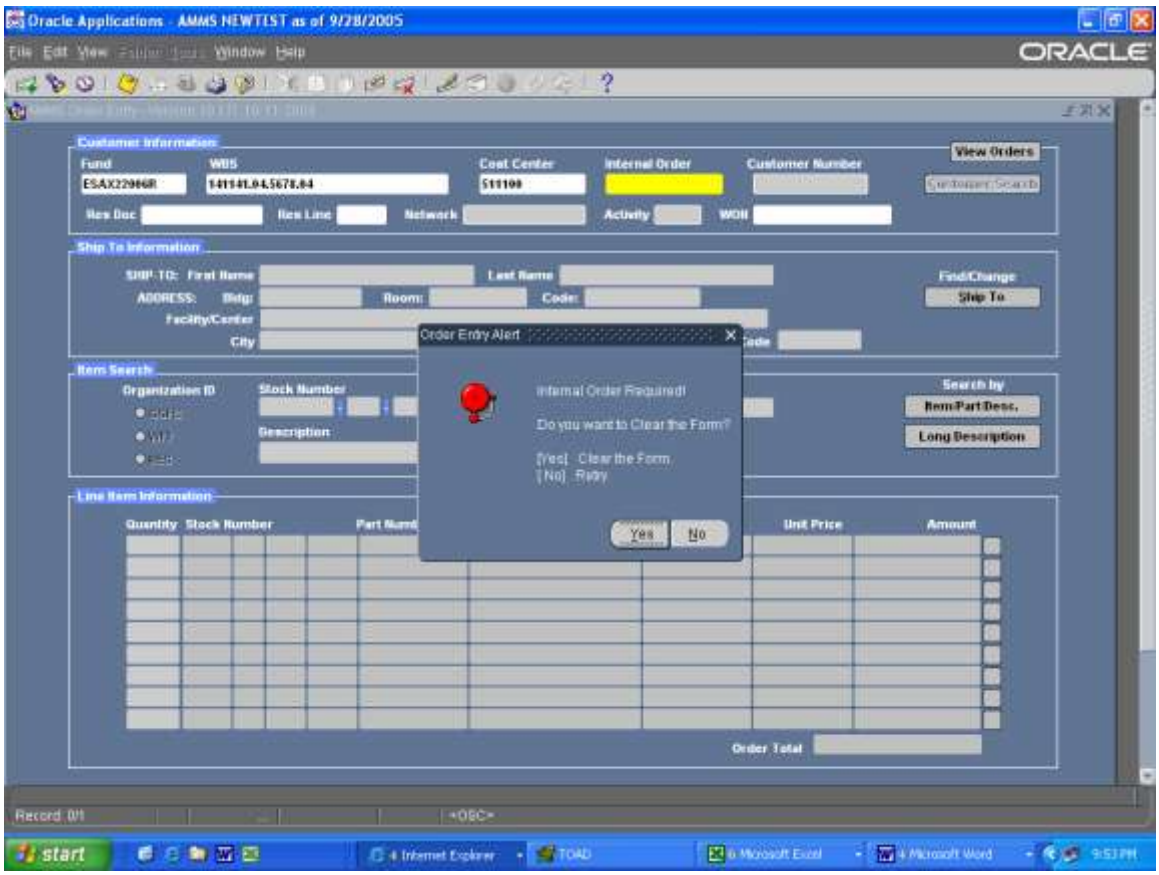
   If a reimbursable fund has been entered, the cursor will move to the **Res Doc** field. For reimbursable funds, proceed to *Step 2E Enter Reservation Document*



Common Errors for Internal Order Entry

Internal Order Not Specified

1. You moved the cursor to the **Res Doc** field without entering an Internal Order value:



2. If you skipped the field by mistake, click the **No** button in the alert window and you will be returned to the Internal Order field.

3. Otherwise, click the **Yes** button and all of the form fields will be cleared.

Step 2E: Entering Reservation Document Number

If the Fund associated with your Financial String is a reimbursable or working capital fund, AMMS requires you to enter a Reservation Document and Line Number. Only Reservation Document and Line information that is valid for the Fund and WBS values associated with that Financial String can be entered into the **Res Doc** and **Res Line** fields.

If the Fund number you entered is not reimbursable, see Task 3: Specifying the Ship To Information.

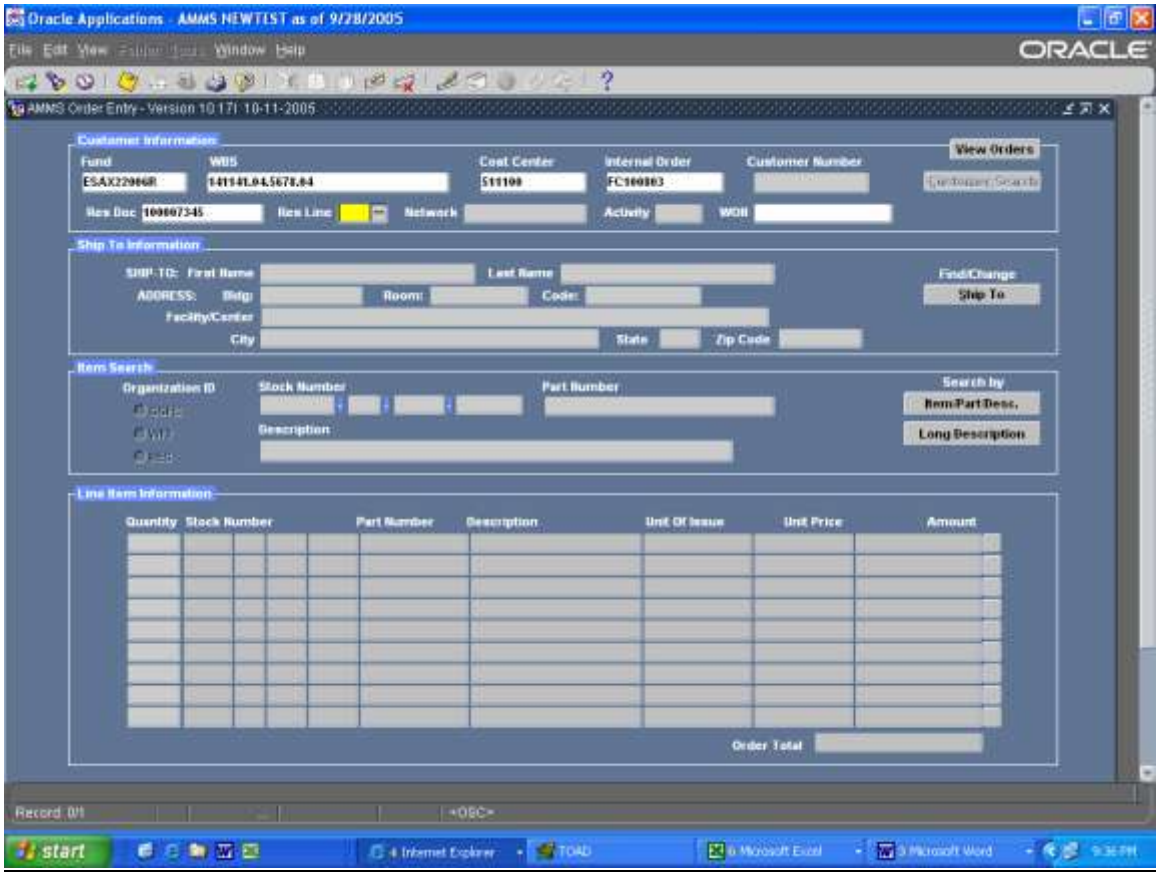
Specifying the Reservation Document Number

12. If you know the correct Reservation Document Number, you can enter a value directly in the **Res Doc** field or click on the List of Values (LOV) button on the right side of the field to get a List of Values valid for that Financial String.

13. If you use the List of Values button, highlight the Reservation Document Number you want and click the **OK** button.

    If a value automatically loaded into the field when you clicked the LOV button, it means there is only one valid Reservation Document Number in the List of Values.

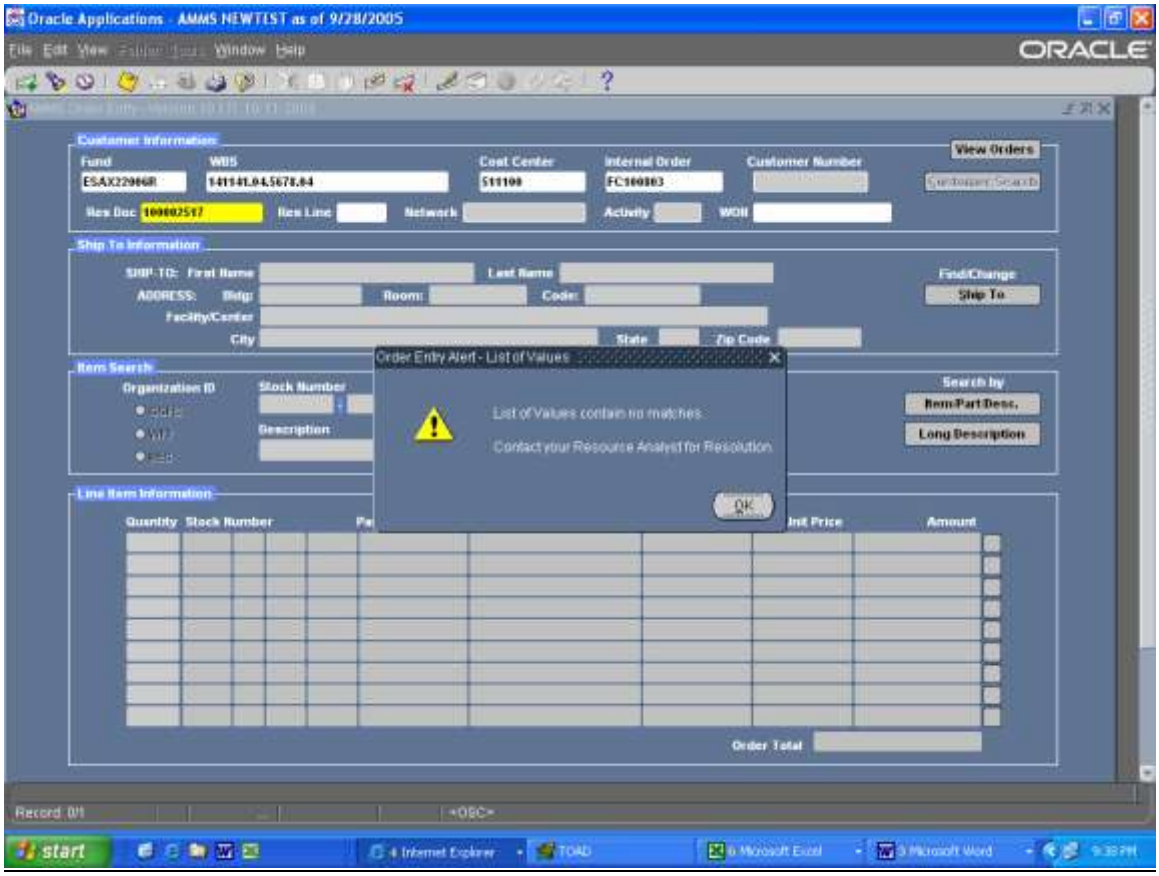
14. The selected Reservation Document number will load into the field and the Reservation Line (**Res Line**) field will highlight in yellow



Common Error Messages for Reservation Document Entry

Invalid Reservation Document Number Entered

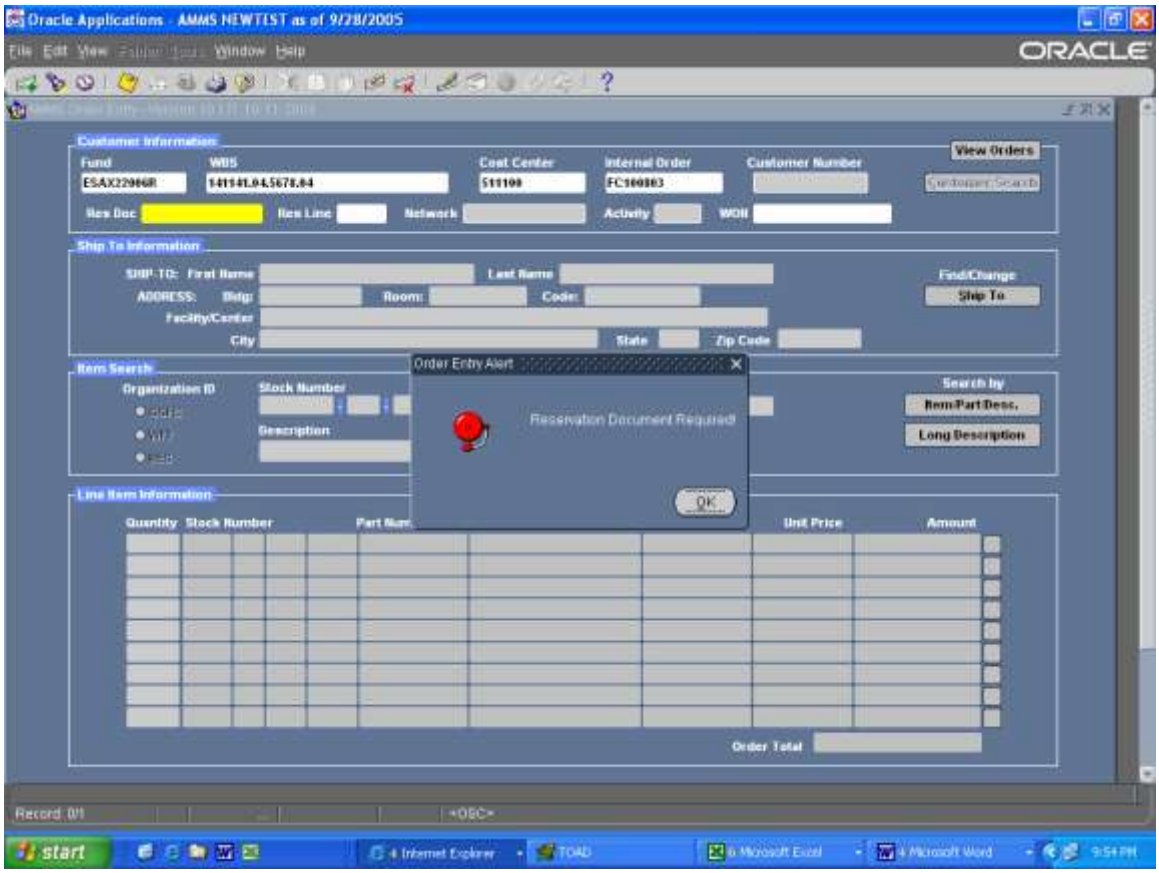
1. If the Reservation Document is not valid, this Order Entry Alert will appear:



2. Click the **OK** button in the alert window and you will be returned to the **Res Doc** field. If you mistyped the Reservation Document number can enter the value again or click on the List of Values button.

Skipped the Reservation Document Field

1. If you moved the cursor to the Res Line field without entering a value in the Res Doc field, this alert will appear:



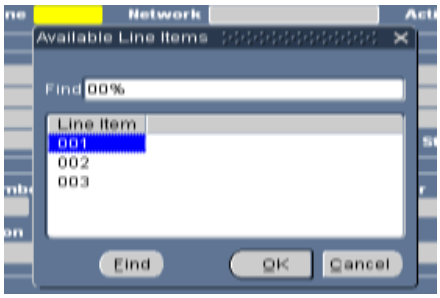
Click the **OK** button in the alert window and you will be returned to the **Res Doc** field. You can enter a value or select one using the List of Values button.

Step 2F: Entering Reservation Line Number

Specifying The Reservation Line Number

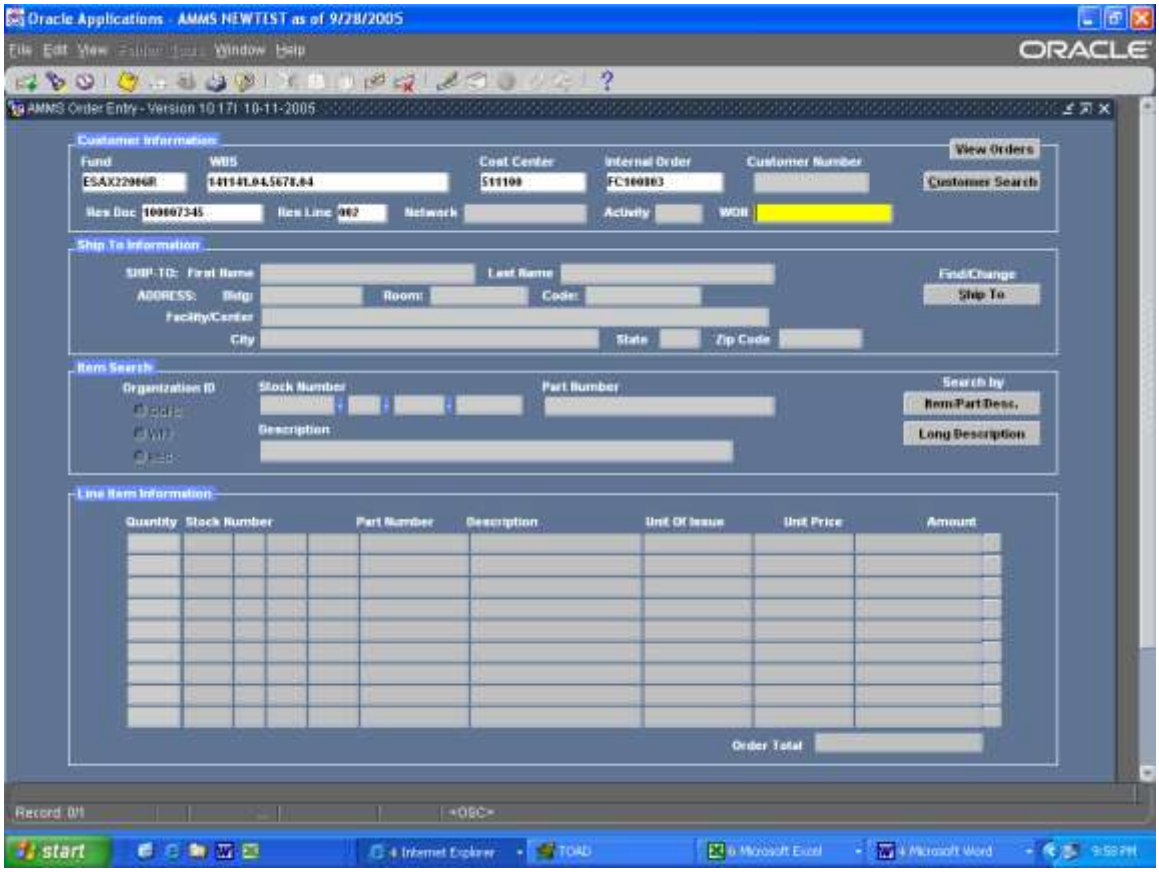
1. If you know the correct Reservation Line Number, you can enter a value directly in the **Res Line** field or click on the List of Values (LOV) button on the right side of the field to get a List of Values valid for that Customer Number.

2. If you use the List of Values button, highlight the Reservation Line Number you want and click the **OK** button.



If a value automatically loaded into the field when you clicked the LOV button, it means there is only one valid Reservation Line Number in the List of Values.

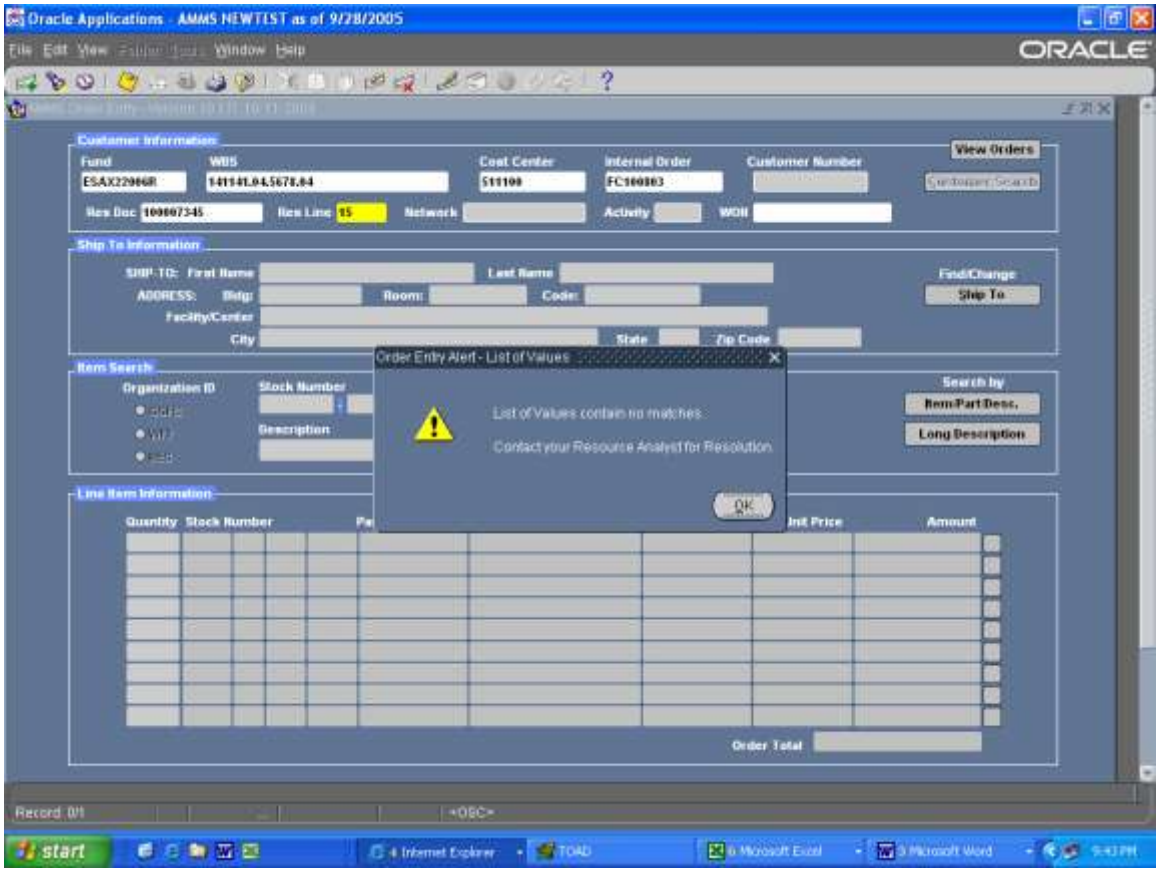
3. The selected Reservation Line Number will load into the field.



Common Error Messages for Reservation Line Entry

Invalid Reservation Line Number Entered

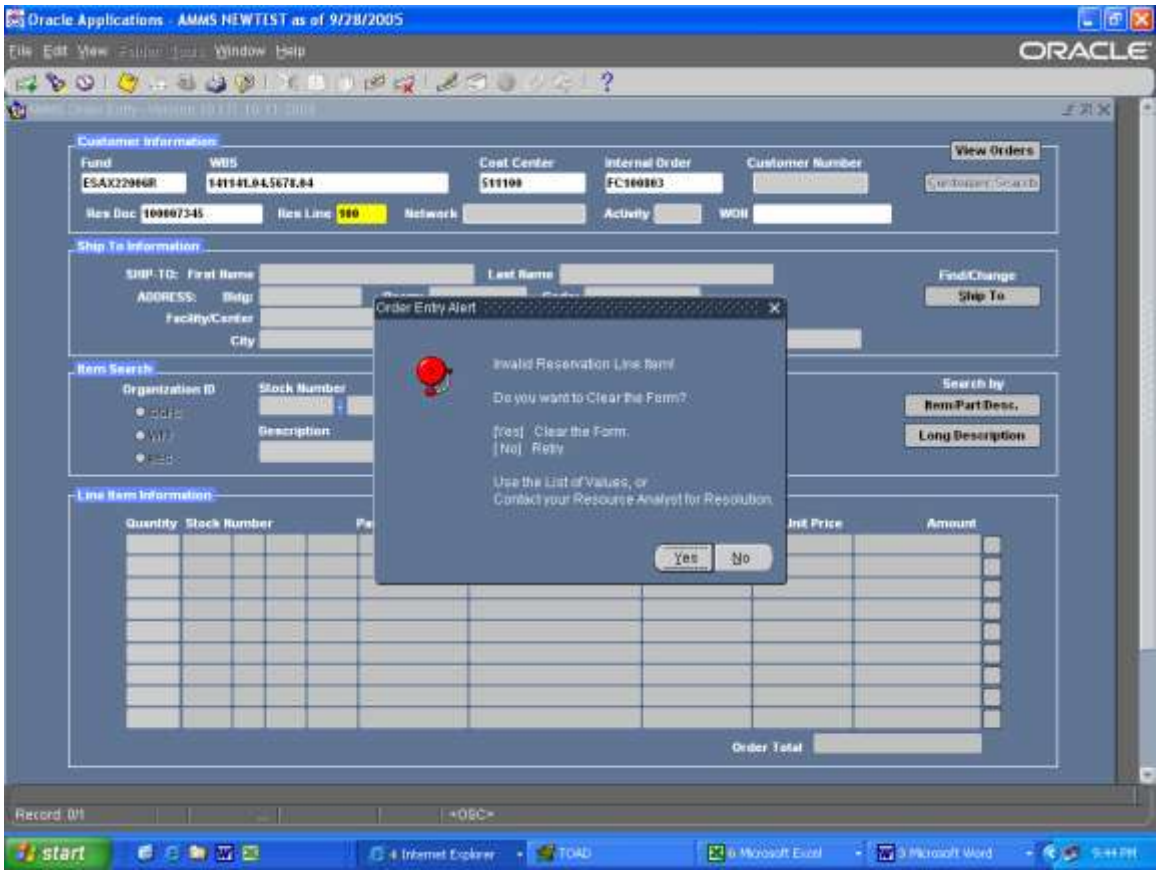
1. You entered a value in the field that does not match a valid Reservation Line number:



2. Click the **OK** button in the alert window and you will be returned to the Res Line field. You can re-enter a value or select on from the List of Values.

Invalid Reservation Line Number

1. You entered three-digit value for RES LINE and get this error:

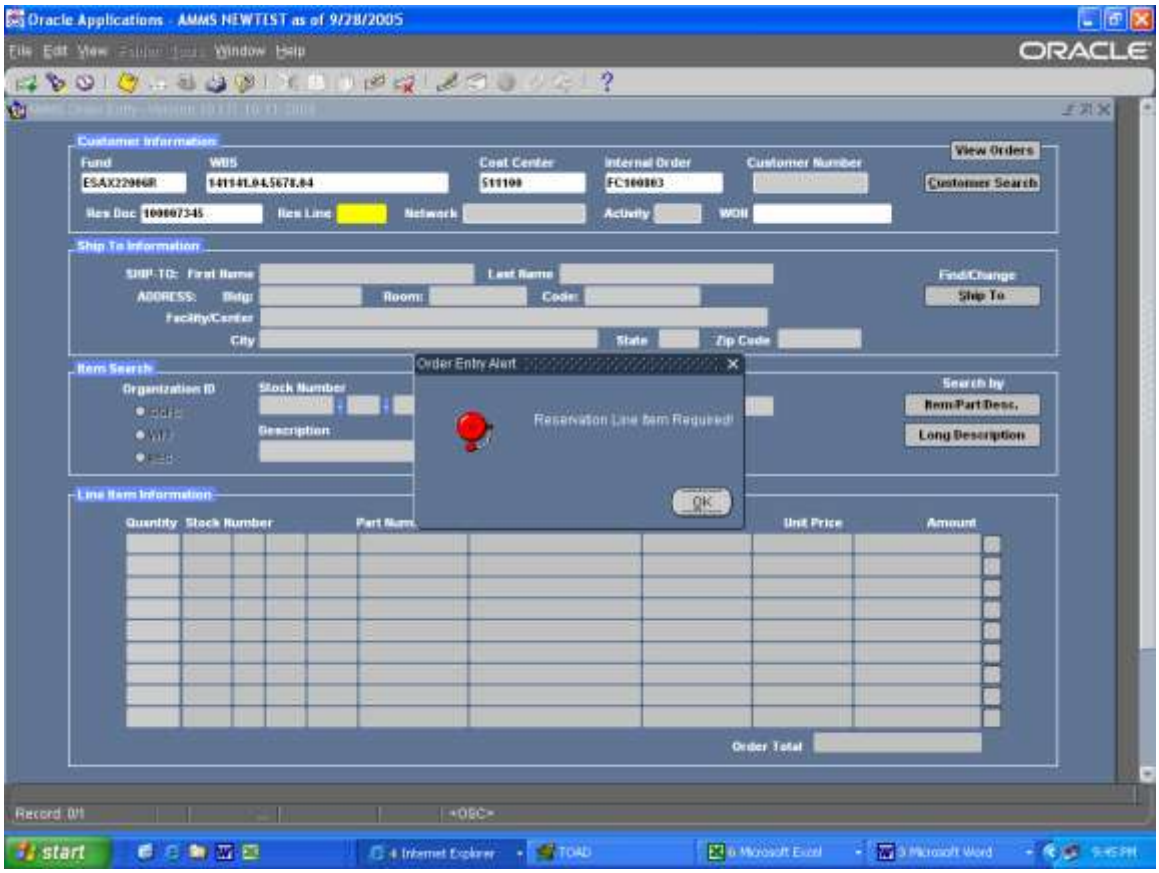


2. If you mistyped, click the No button in the alert window and you will be returned to the Res Line field to re-enter a value or select a one from the List of Values.

3. If you click the Yes button in the alert window, all fields of the form will be cleared. If you believe the value you entered is correct, contact your Resource Analyst to resolve.

No Reservation Document Number Specified

1. You moved the cursor to the WON field or clicked the Customer Search button before entering a value in **Res Line**:



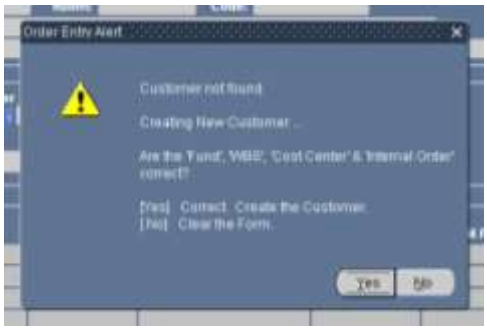
2. Click the **OK** button in the alert window, and you will be returned to the **Res Line** field. Enter a value or select one from the List of Values.

Step 2G: Processing the Financial String Selection

1. At this point you have entered all required fund string data. Click the **Customer Search** button. If this is the first time this customer financial information is being used in AMMS, you will need to "create" a customer. Oracle will ask if the entered information is correct and whether to create a customer. Select **Yes** if correct or **No** if incorrect.

WARNING: *If you select* ***No****, this will clear the form.*

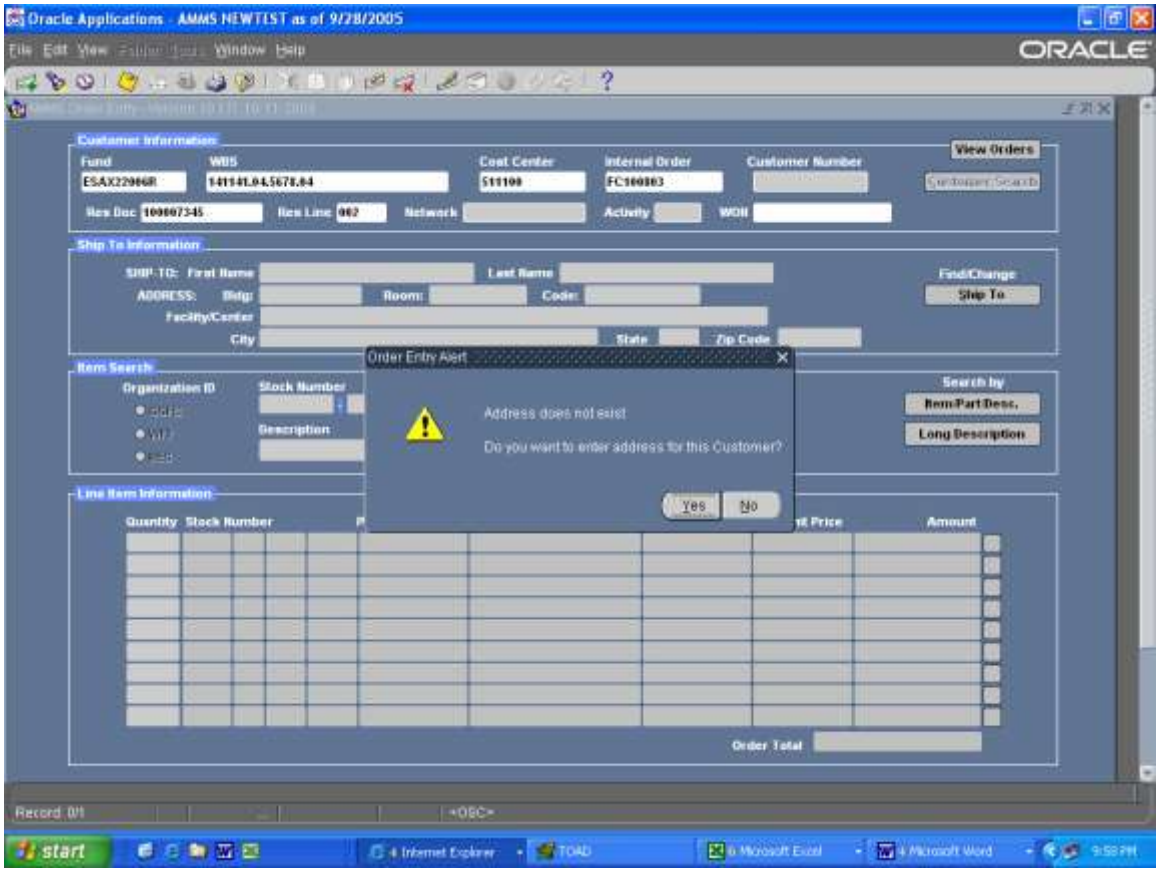
2. The Order Entry Alert window will open asking if the information entered is correct.



3. Click the **Yes** button in the alert window if the information you entered is correct. Behind the scenes Oracle will create a customer.

   If the information you entered is not correct, click the **No** button in the alert window. This will clear all fields in the form and you can start over.

4. If you selected Yes, you will be prompted to enter an address. See section *Task 3 Updating the Ship To Information* on how to add a address for this customer

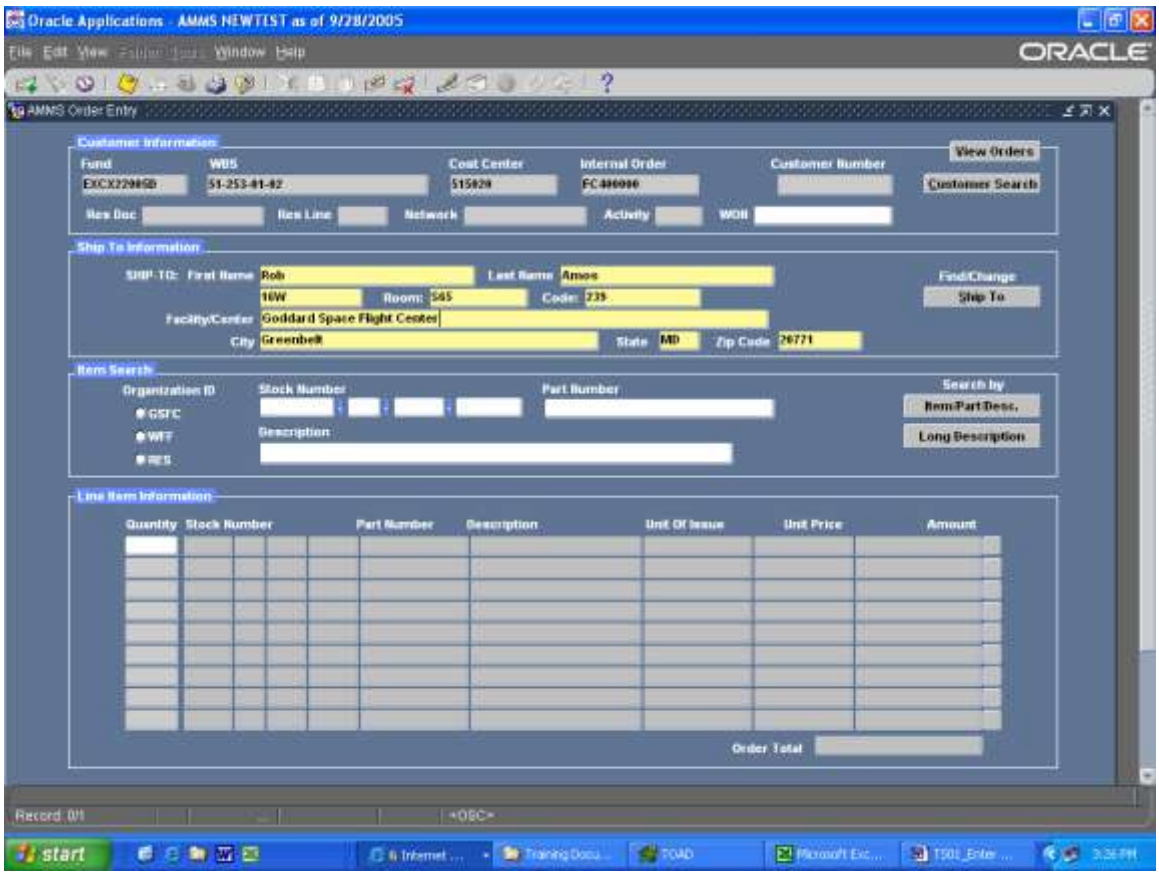


Task 3: Adding the Ship To Information

Since you are adding a new customer to AMMS, you will need to add a new shipping contact for this Customer Number:

2. Fill in the blanks, customers first and last name, building, room, code, facility/center, city, state and zip code. Once you have completed this click in the **Stock Number** field and the address field will become gray.

WARNING: *When specifying your building, room and code, do not add the words "building", "room" or "code" in front of the number. For example, Building 16W should only be specified as 16W in the* ***Building*** *field. Adding any additional words to the address field may cause AMMS to not process your order delaying the receipt of materials to your customer.*

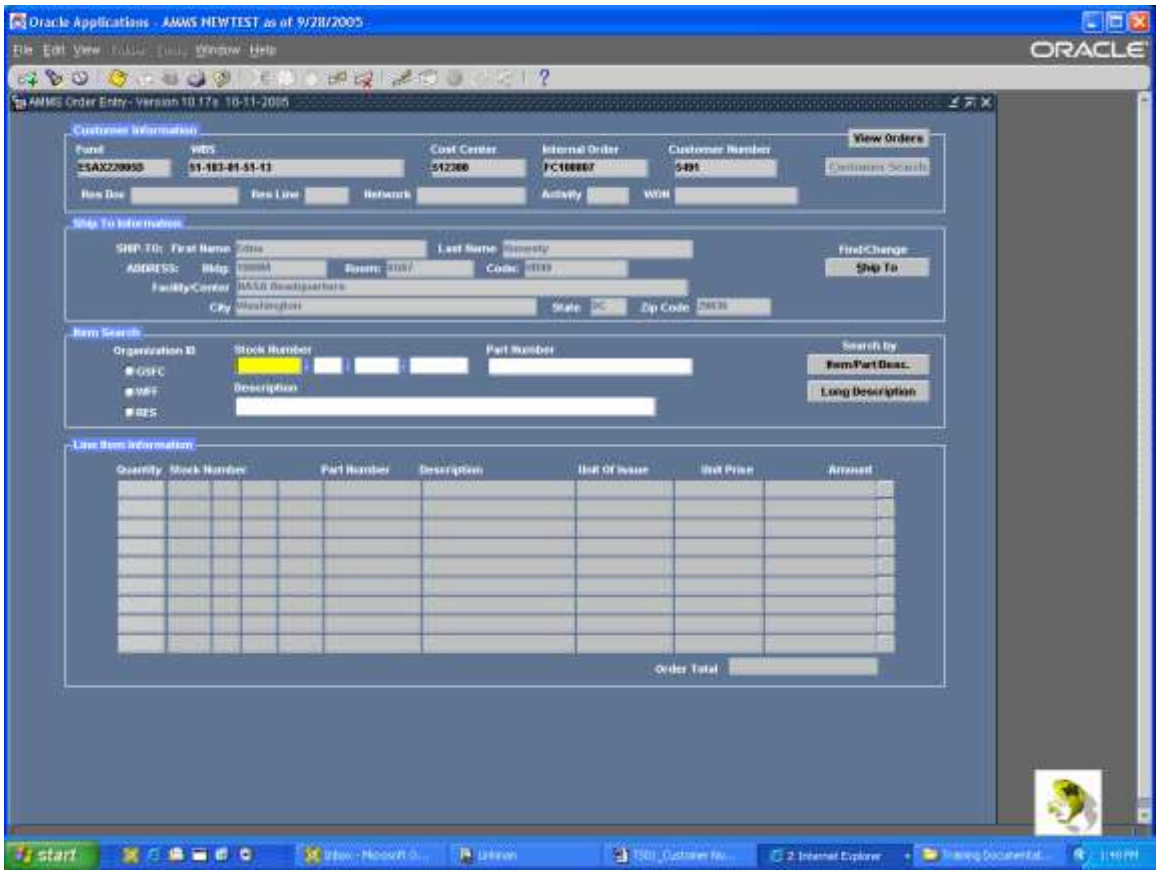


Task 4: Item Search

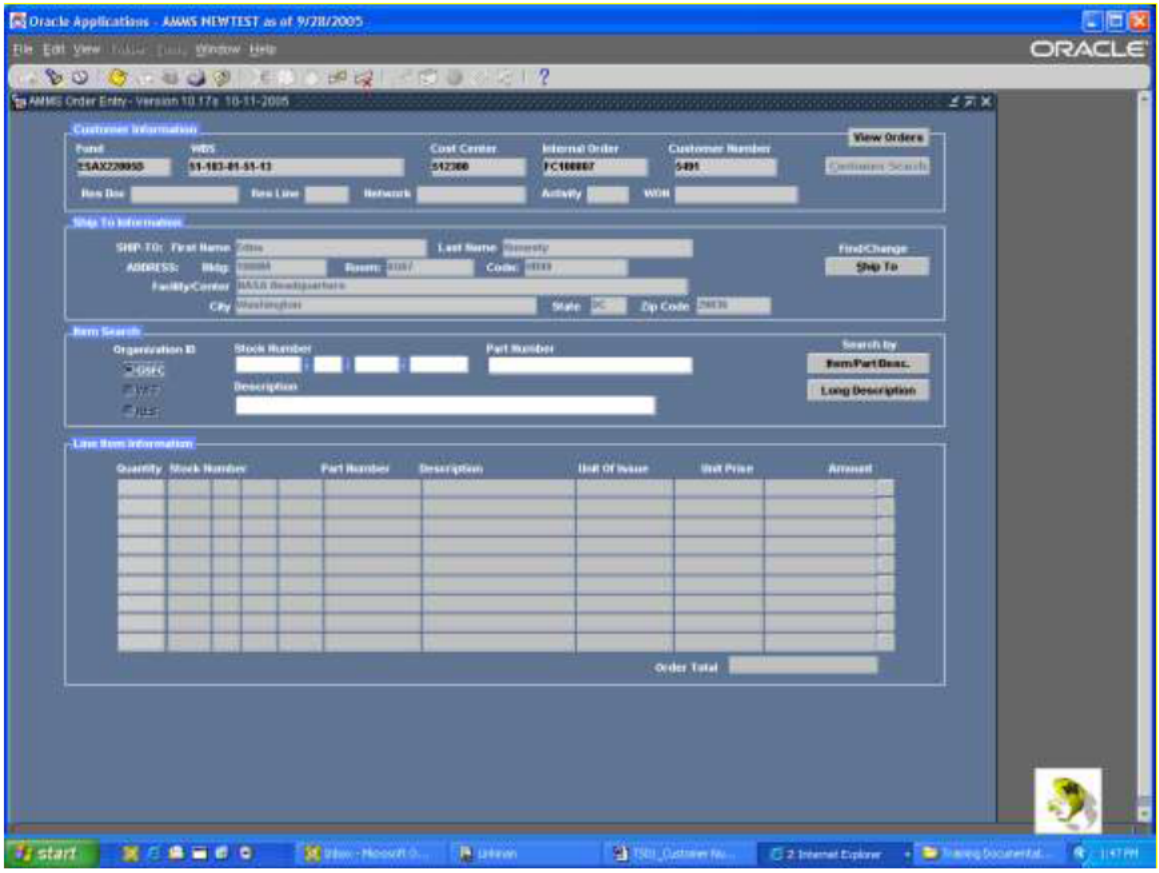
Step 4A: Selecting Your Organization

In order to begin adding stock items to your order, you first select your organization.

3. Click the 'Radio Button' beside your NASA **Organization ID**



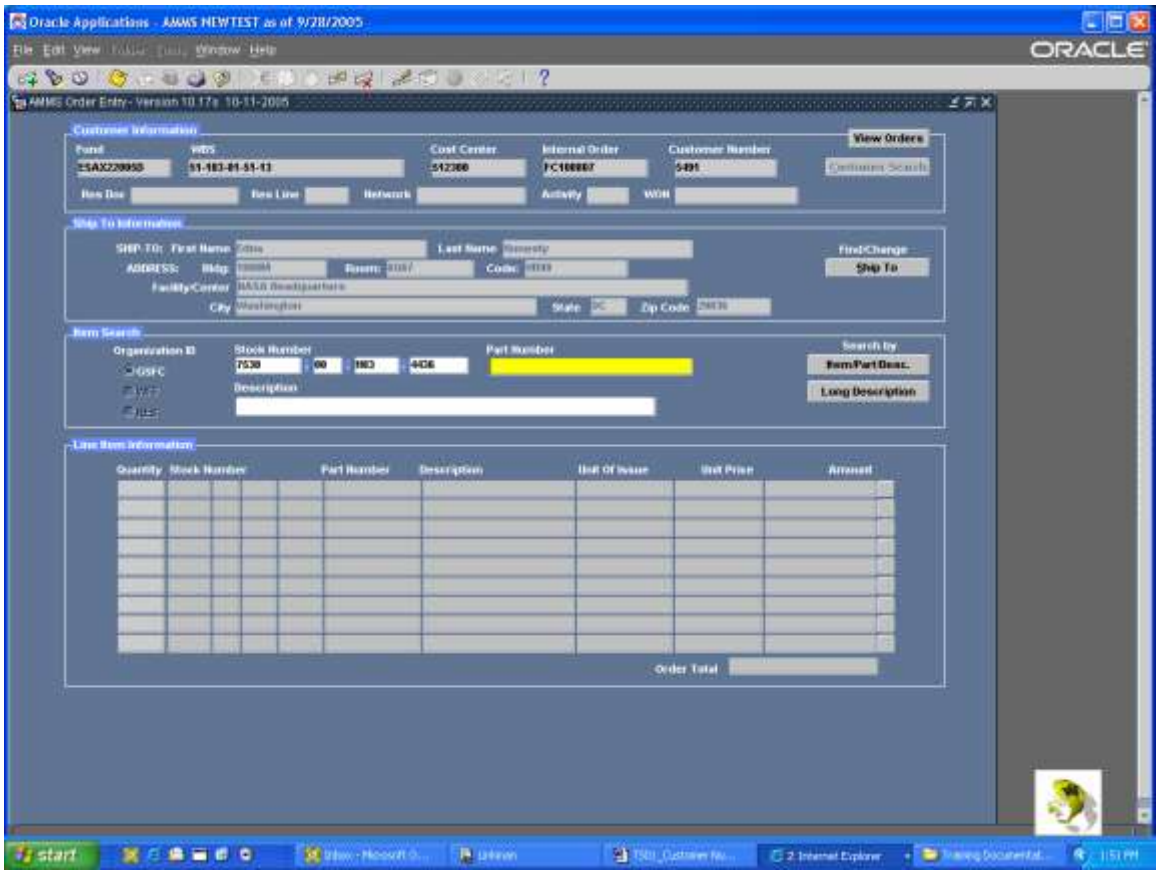
4. The selected NASA Organization ID will be selected and all other options are inactivated.



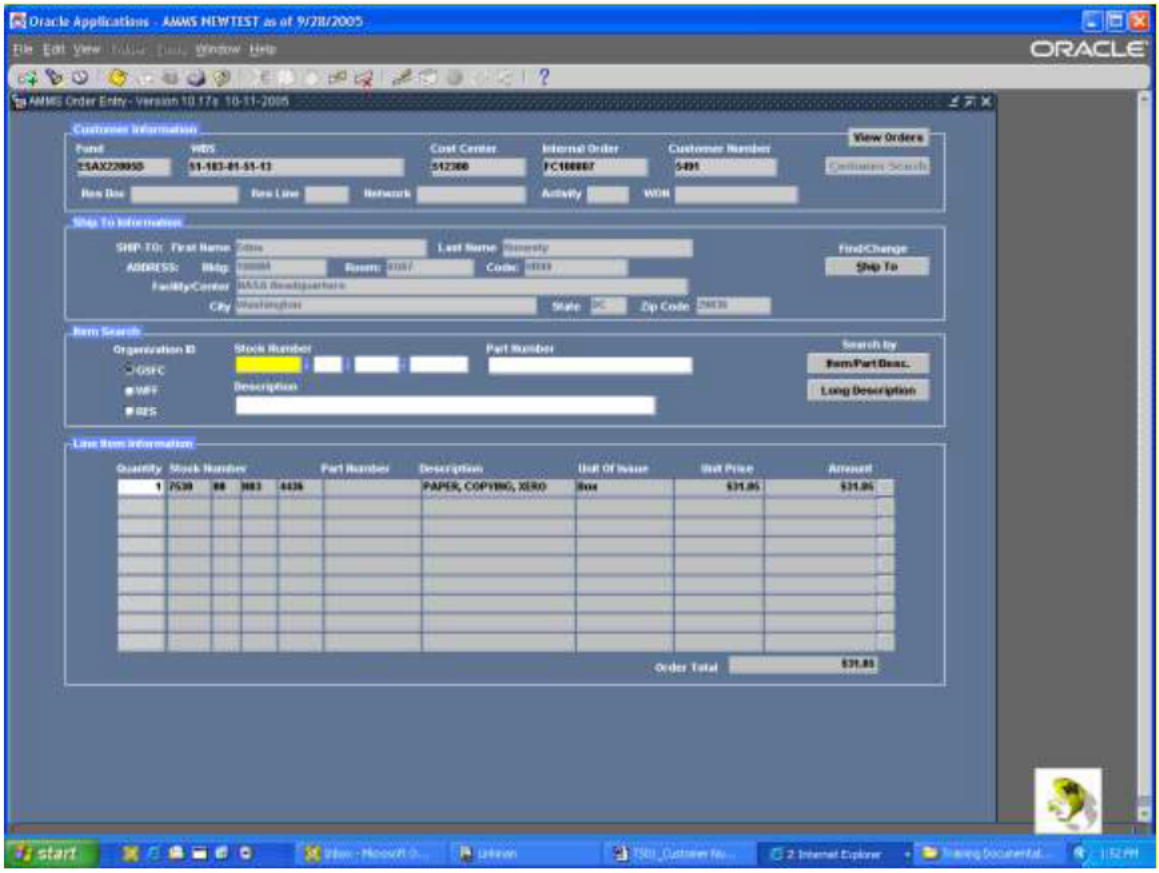
Step 4B: Enter Item Number

To begin ordering items for your customer, you must now specify the item stock number.

3. In the Item Search area, enter the Item Number in the **Stock Number** field, and then click on the **Item/Part/Desc** button.



4. Data will appear in the Line Item Information section.

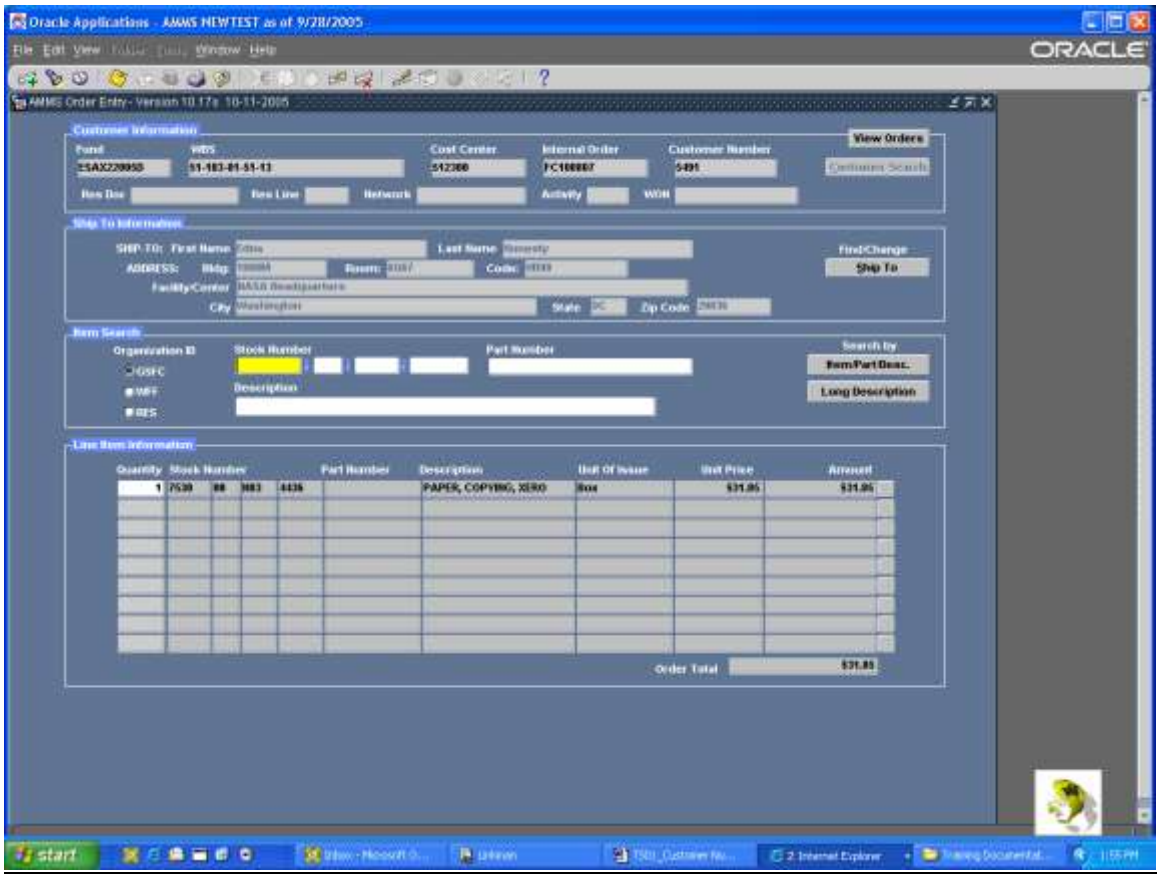


Task 5: Entering Line Item Information

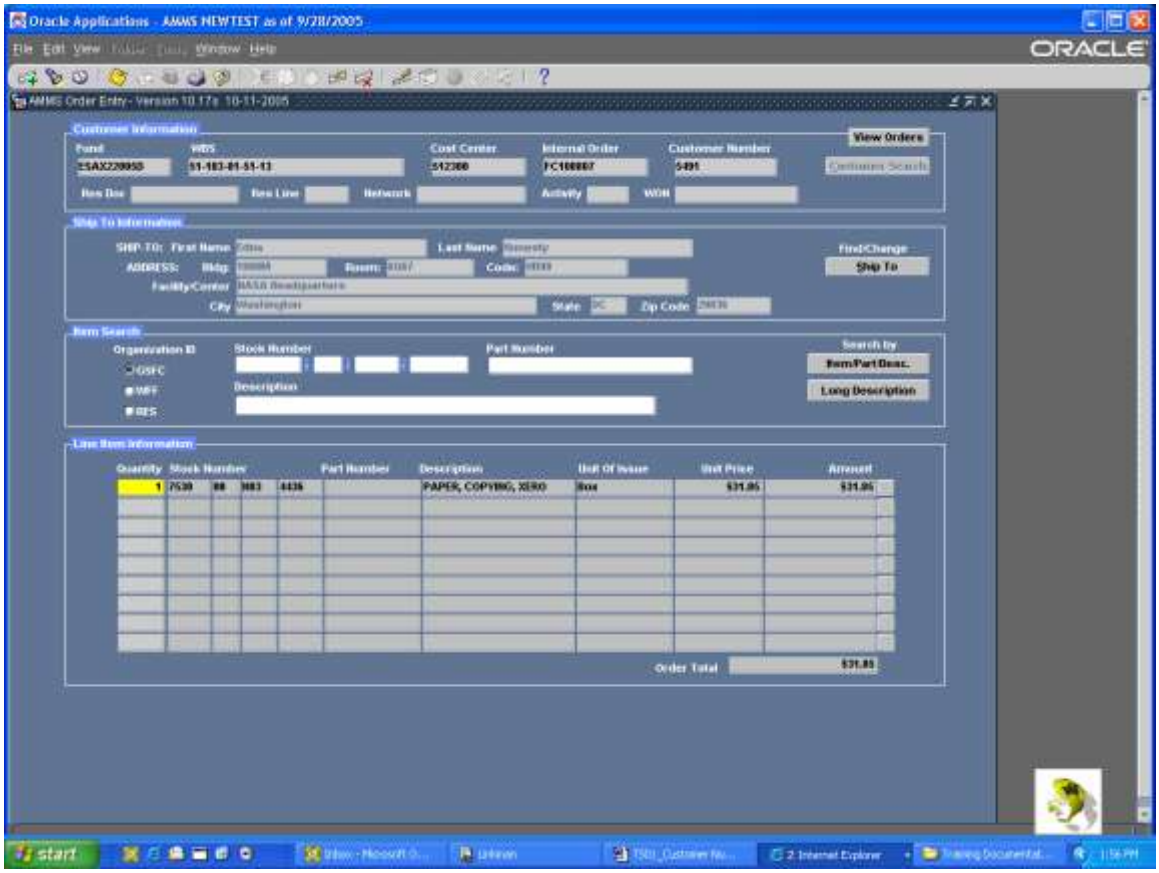
Step 5A: Updating the Line Item Quantity

By default, the quantity will of each line item ordered defaults to 1. If you want to order more than one of this item, you can you can change the quantity.

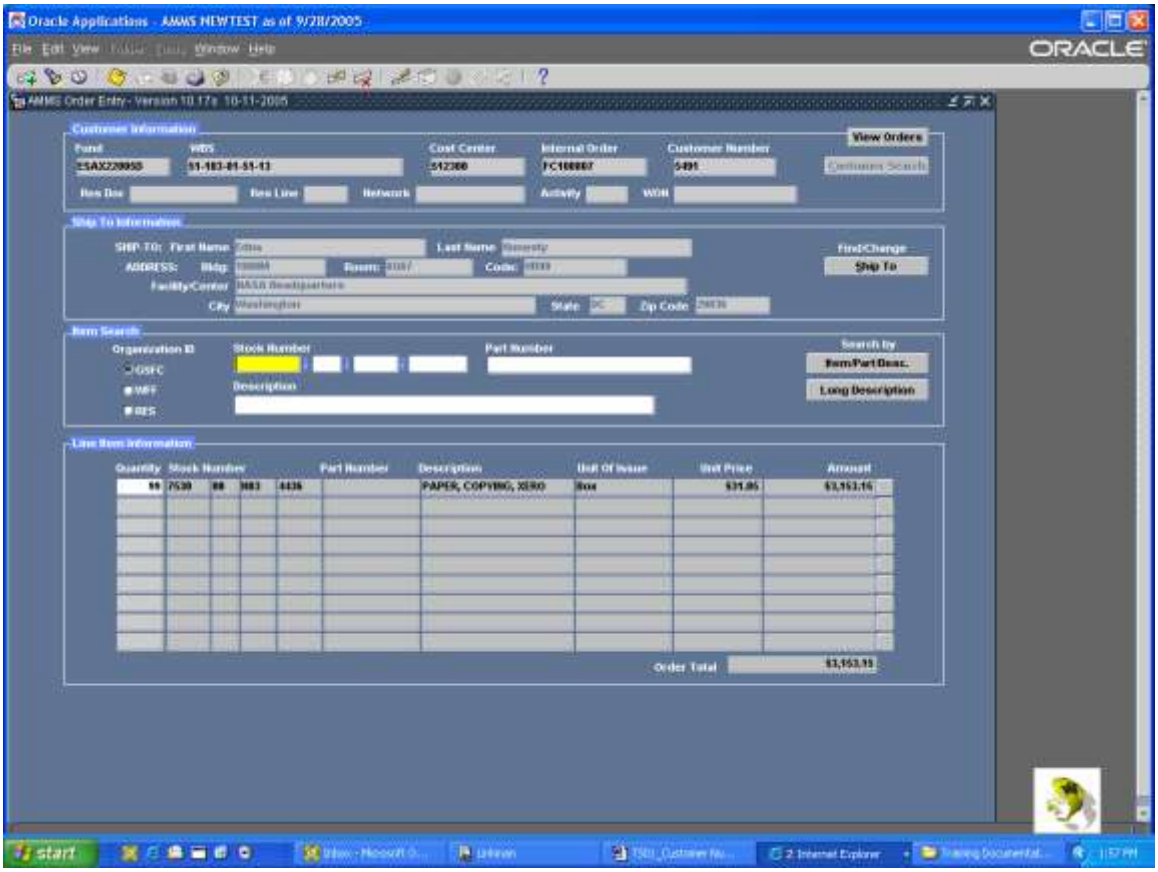
4. Click in the Quantity field for the line item.



5. It will turn yellow.



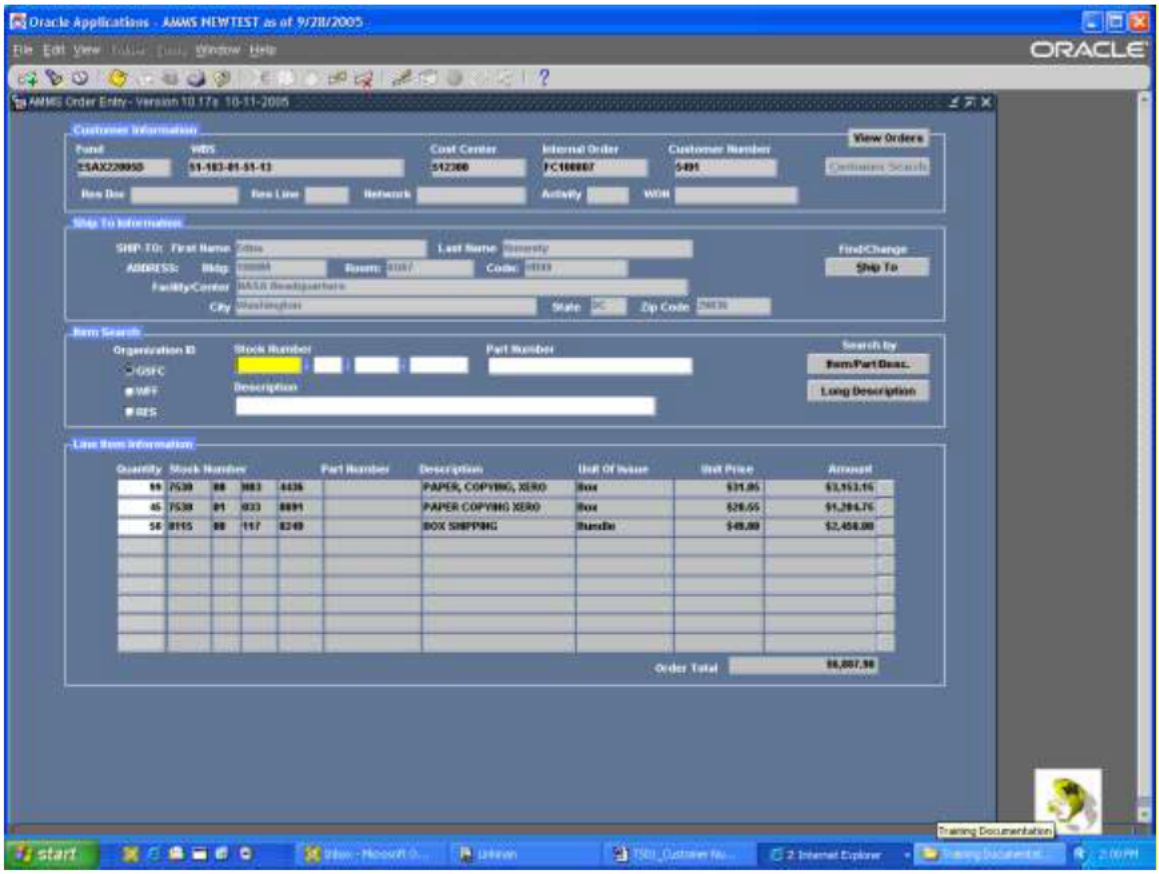
6. Update the quantity for that item and then click back in the Stock Number field to add a new line item.



Step 5B: Entering Additional Order Lines

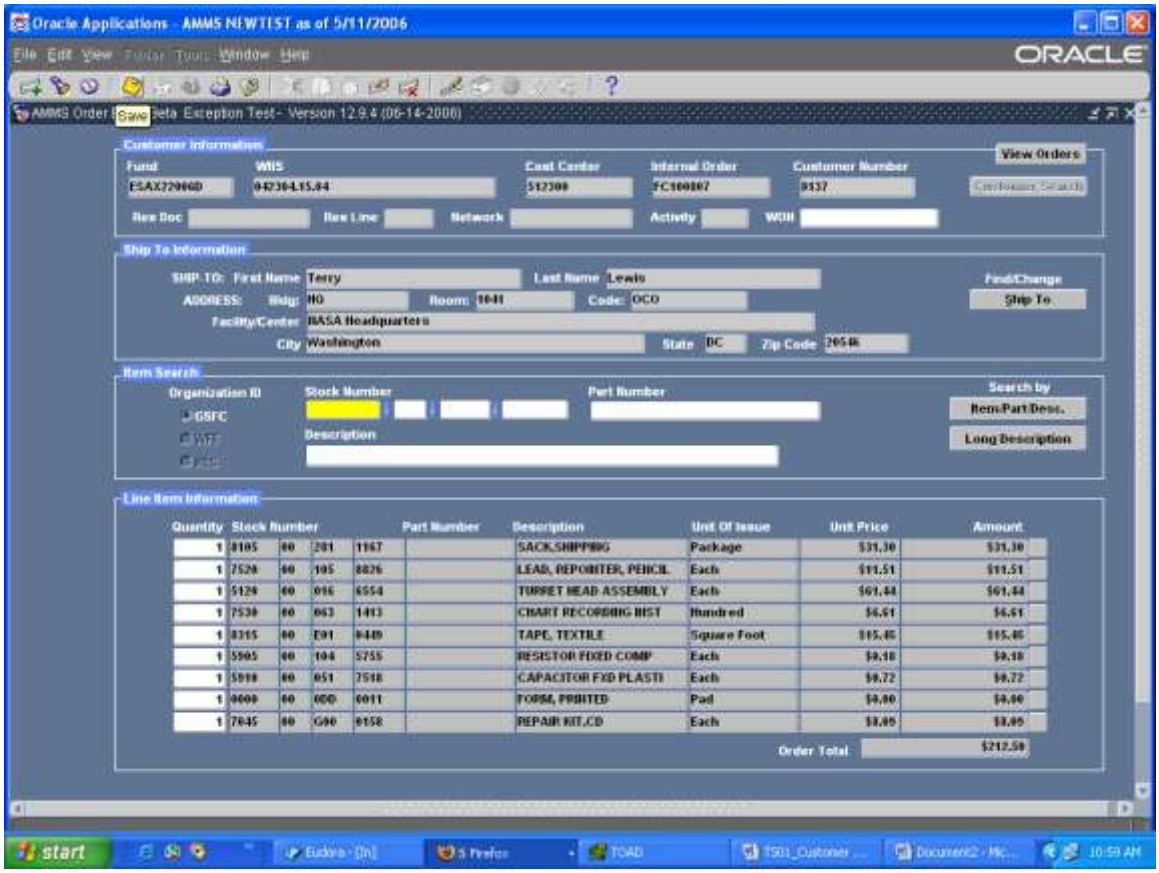
You can add up to 99 lines to one order just repeat the steps where you enter the item number, remember to update the quantities if needed.

All items will be in the Line Item Information section, verify that your quantities are correct.



Task 6: Saving Your Order

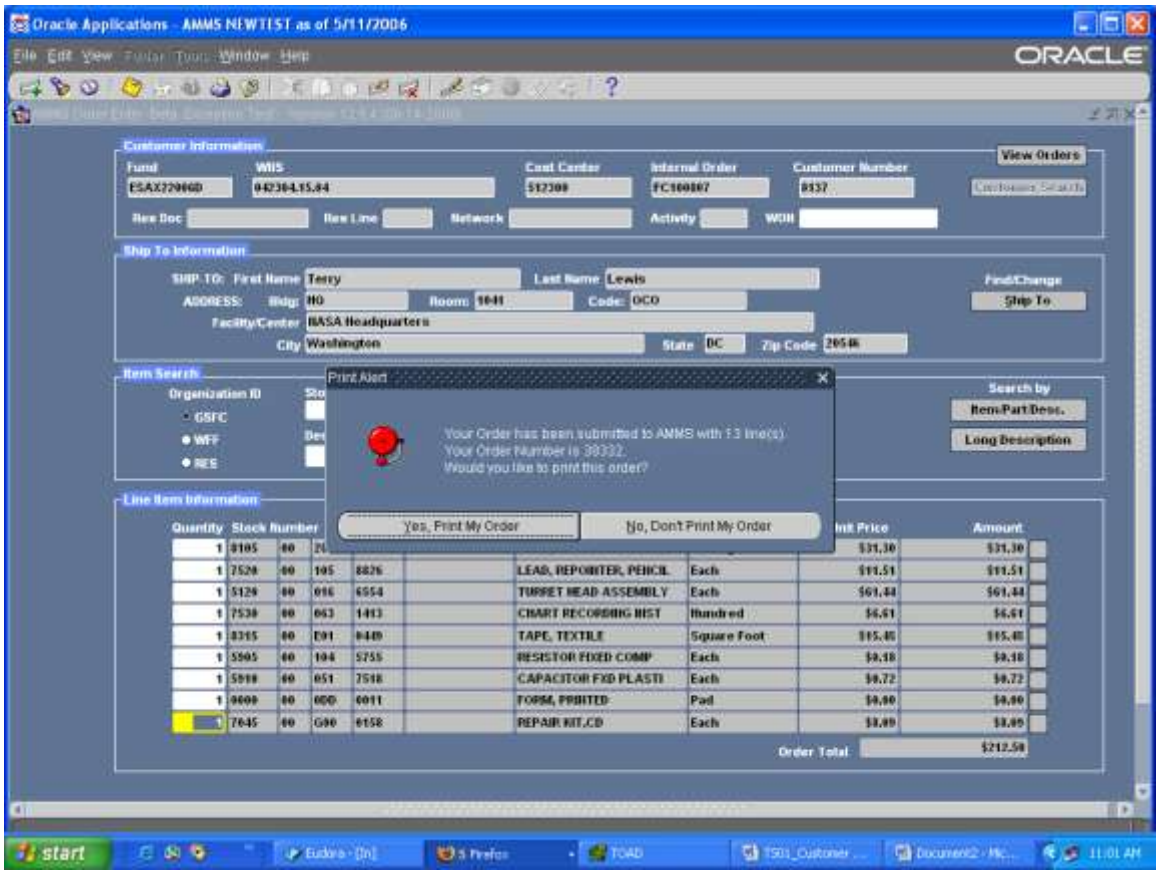
5. Once you have entered all of your lines on the order click on the Yellow Diskette on the tool bar, this is the **Save** button. This will save your order, give you an order number and ask if you would like to print your order.



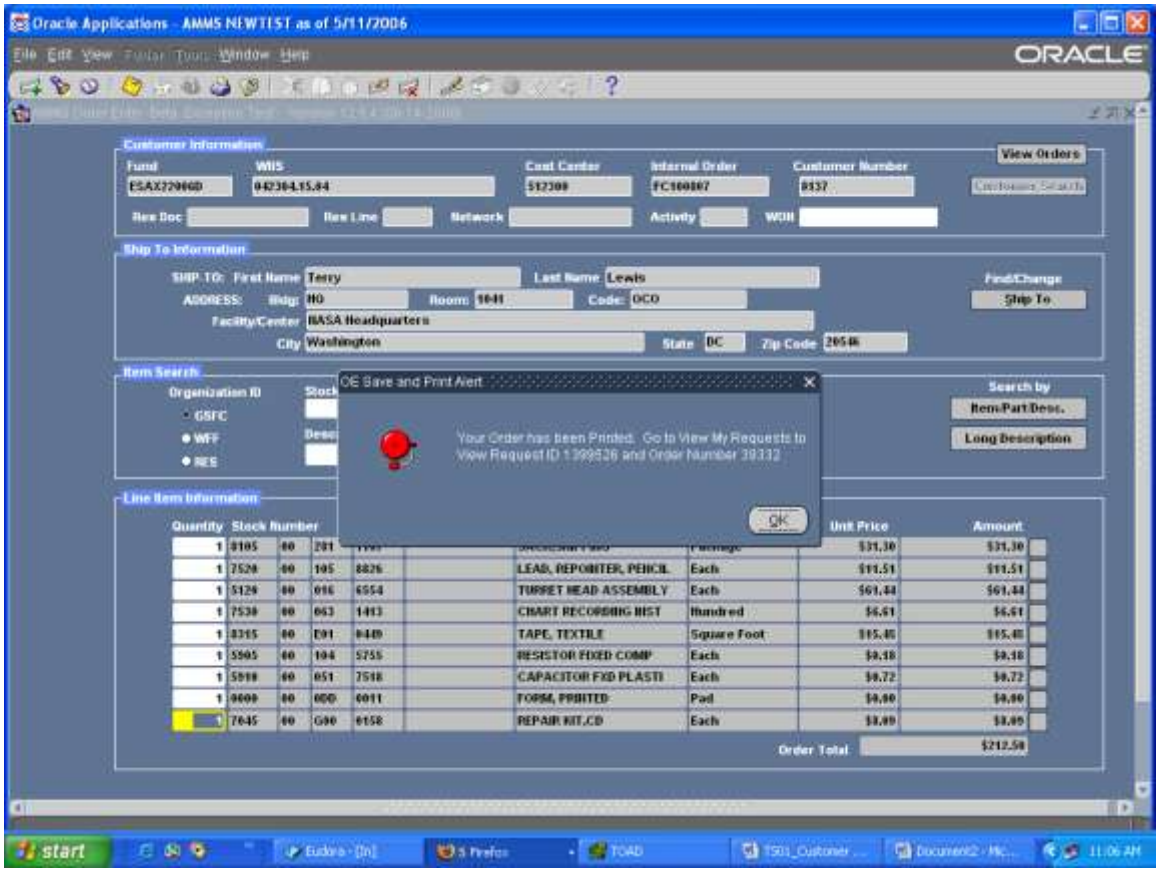
6. You will receive an OE Print Alert window, telling you your order has been submitted to AMMS, the number of line items, your Order Number, and asking “Would you like to print this order?”

   A. If you click “Yes, Print my Order”, you will receive another OE Alert

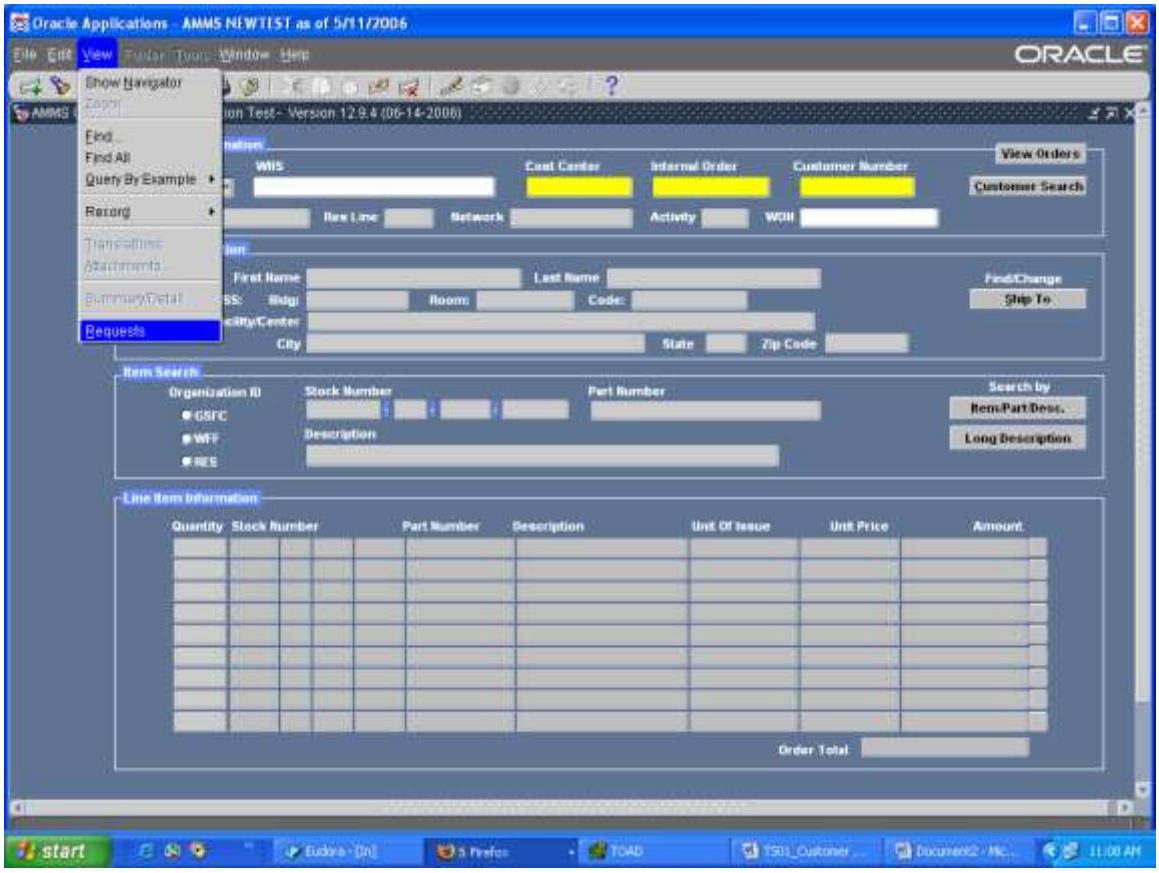
   B. If you click “No, Don’t Print my Order”, you order will still be submitted for processing but not be printed. You will have to contact the AMMS Help Desk at 6-2525 to print your order.



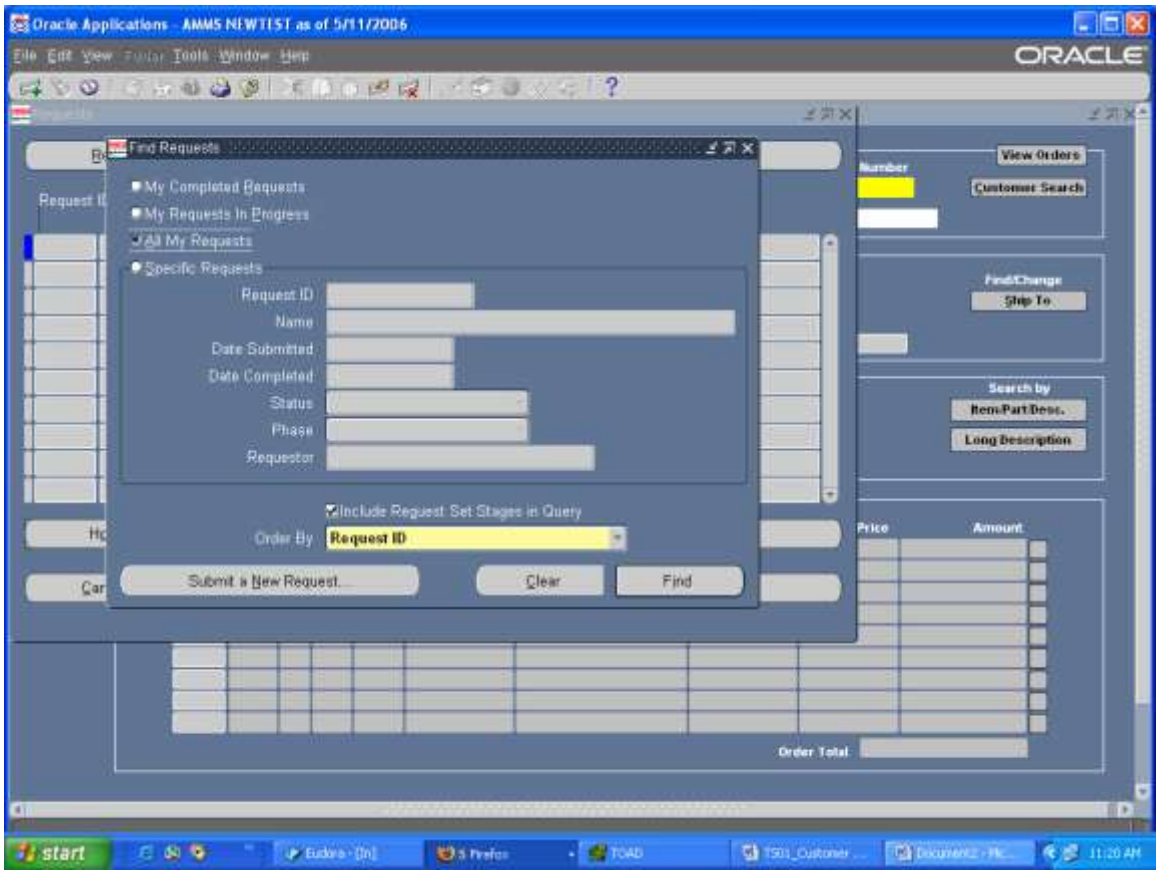
3. If you click “Yes, Print my Order” you will receive an OE Save and Print Alert, telling you your order has been printed, and to go to View Requests to view your order.



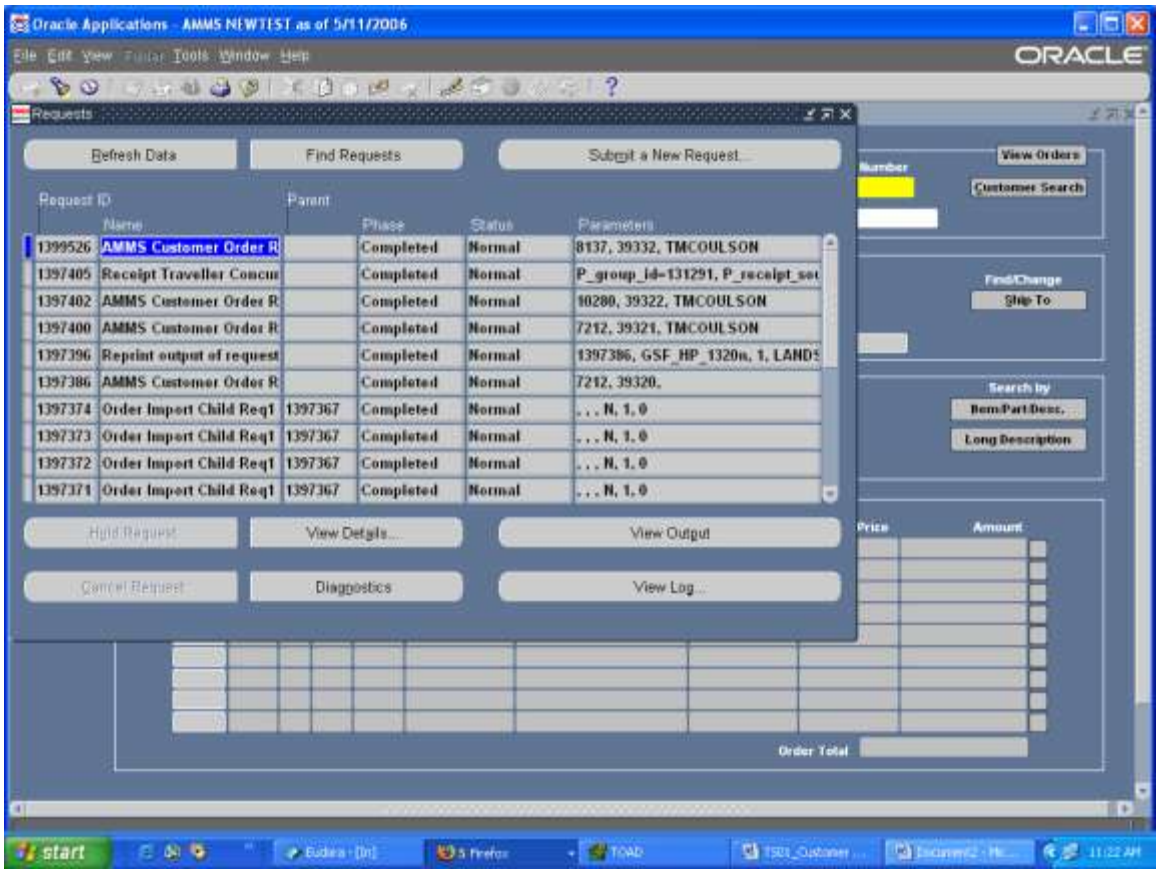
4. Click OK to the OE Save and Print Alert, your form will go blank. From the Toolbar select View, then select Requests



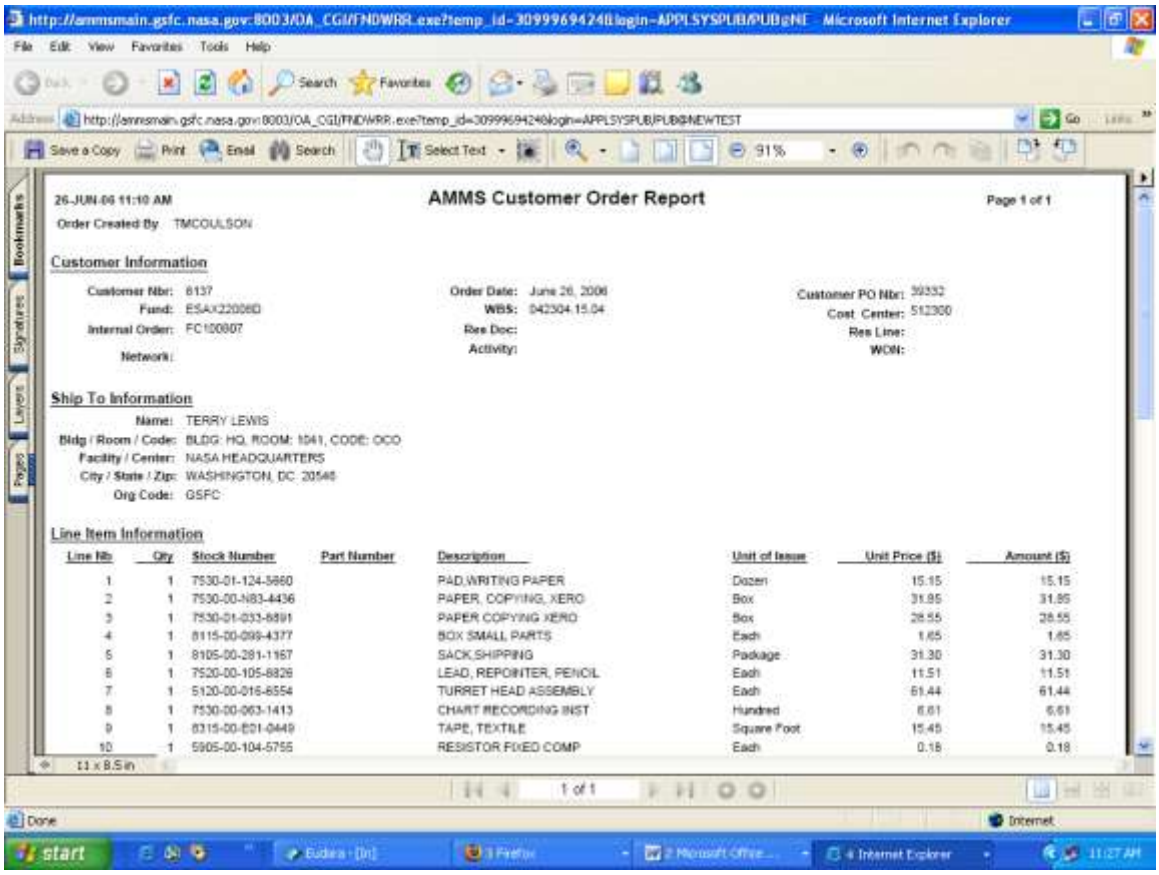
5. The Find Requests window will appear, make sure the “All my Requests” is selected, click on the Find Button



6. You are looking for the AMMS Customer Order Report. To the right on each line, you will see your Customer Number, AMMS Number and your name. Make sure that the line indicator is on the line you want to print, if not, click on the order you want to print, click on the View Output button



7. Adobe Acrobat will open with the AMMS Customer Order Report for the selected order.



26-JUN-06 11:10 AM

Order Created By: TMCOULSON

AMMS Customer Order Report

Page 1 of 1

Customer Information

Customer Nbr: 6137
Fund: ESAX22006D
Internal Order: FC100807
Network:

Order Date: June 26, 2006
WBS: 042304.15.04
Res Doc:
Activity:

Customer PO Nbr: 39332
Cost Center: 512300
Res Line:
WDN:

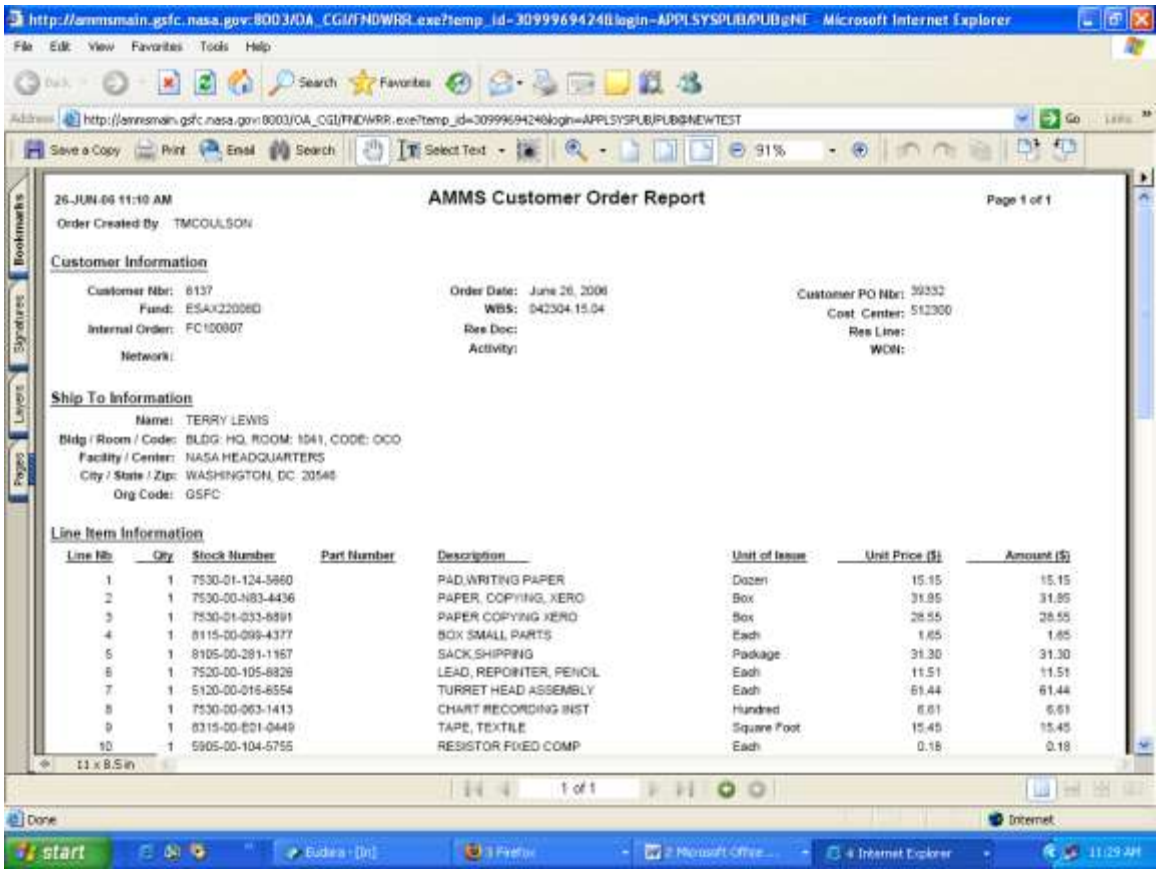
Ship To Information

Name: TERRY LEWIS
Bldg / Room / Code: BLDG: HQ, ROOM: 1041, CODE: OCO
Facility / Center: NASA HEADQUARTERS
City / State / Zip: WASHINGTON, DC 20546
Org Code: GSFC

Line Item Information

Line Nb	Qty	Stock Number	Part Number	Description	Unit of Issue	Unit Price ($)	Amount ($)
1	1	7530-01-124-5860		PAD,WRITING PAPER	Dozen	15.15	15.15
2	1	7530-00-N83-4436		PAPER, COPYING, XERO	Box	31.85	31.85
3	1	7530-01-033-8891		PAPER COPYING XERO	Box	28.55	28.55
4	1	8115-00-099-4377		BOX SMALL PARTS	Each	1.65	1.65
5	1	8105-00-281-1167		SACK,SHIPPING	Package	31.30	31.30
6	1	7520-00-105-8826		LEAD, REPOINTER, PENCIL	Each	11.51	11.51
7	1	5120-00-016-8554		TURRET HEAD ASSEMBLY	Each	61.44	61.44
8	1	7530-00-063-1413		CHART RECORDING INST	Hundred	6.61	6.61
9	1	8315-00-E01-0449		TAPE, TEXTILE	Square Foot	15.45	15.45
10	1	5905-00-104-5755		RESISTOR FIXED COMP	Each	0.18	0.18

8. From this page you can either print your order, or save it to your desktop. To print the order click on the "Print", to Save the order click "Save a Copy", and save to your documents. You can open the saved order at anytime to print it.



26-JUN-06 11:10 AM

Order Created By TMCOULSON

AMMS Customer Order Report

Page 1 of 1

Customer Information

Customer Nbr: 6137
Fund: ESAX22006D
Internal Order: FC100807
Network:

Order Date: June 26, 2006
WBS: 042304.15.04
Res Doc:
Activity:

Customer PO Nbr: 39332
Cost Center: 512300
Res Line:
WON:

Ship To Information

Name: TERRY LEWIS
Bldg / Room / Code: BLDG: HQ, ROOM: 1041, CODE: OCO
Facility / Center: NASA HEADQUARTERS
City / State / Zip: WASHINGTON, DC 20546
Org Code: GSFC

Line Item Information

Line Nb	Qty	Stock Number	Part Number	Description	Unit of Issue	Unit Price ($)	Amount ($)
1	1	7530-01-124-5860		PAD,WRITING PAPER	Dozen	15.15	15.15
2	1	7530-00-N83-4436		PAPER, COPYING, XERO	Box	31.85	31.85
3	1	7530-01-033-8891		PAPER COPYING XERO	Box	28.55	28.55
4	1	8115-00-099-4377		BOX SMALL PARTS	Each	1.65	1.65
5	1	8105-00-281-1167		SACK,SHIPPING	Package	31.30	31.30
6	1	7520-00-105-8826		LEAD, REPOINTER, PENCIL	Each	11.51	11.51
7	1	5120-00-016-6554		TURRET HEAD ASSEMBLY	Each	61.44	61.44
8	1	7530-00-063-1413		CHART RECORDING INST	Hundred	6.61	6.61
9	1	8315-00-E01-0449		TAPE, TEXTILE	Square Foot	15.45	15.45
10	1	5905-00-104-5755		RESISTOR FIXED COMP	Each	0.18	0.18

AMMS ORDER ENTRY TRAINING SCRIPTS

AMMS TRAINING SCRIPT

GSFC AMMS Order Entry Training Script

Entering Customer Orders Using Financial Strings

Authors	Theresa Coulson
Creation Date	10/1/2007
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Summary of Changes

This training document will walk you through the process of entering an order in the AMMS Order Entry form when using the SAP Financial String information (Fund, WBS, Cost Center and Internal Order)

For the 2008 Fiscal Year, several changes were required for the AMMS Order Entry System. These changes include:

- All orders now require funds validation at the Funded Program level to ensure funds are in the Inventory Pool before orders are placed in AMMS, and to ensure there are sufficient funds available when the order is submitted.
- In order to check funds availability, the Customer Number field is no longer available. Users must input the financial string fields (Fund, WBS, Cost Center, and Internal Order) for each order.
- A Save function allows users to start an order, save the order, modify the order, and submit the order at a different time.
- All users of AMMS are required to have the AMMS authorization form on file before being able to use AMMS in FY 2008. This form provides the AMMS user with authorization to use the AMMS application and to use the specified Funded Programs.
- The new “Requested For” field, allows AMMS users to specify who they are placing the order for.
- New and enhanced informational alerts and error messages for fields and functions have been added to AMMS.

Task 1: Accessing the AMMS Order Entry System

This section will describe how to access the AMMS Oracle system and log in using your AMMS userid and password. If you are not currently enrolled as an AMMS user, you must contact AMMS Helpdesk at 301-286-2525 or send an e-mail to Tabatha Luskey at Tabatha.L.Luskey.1@gsfc nasa.gov.

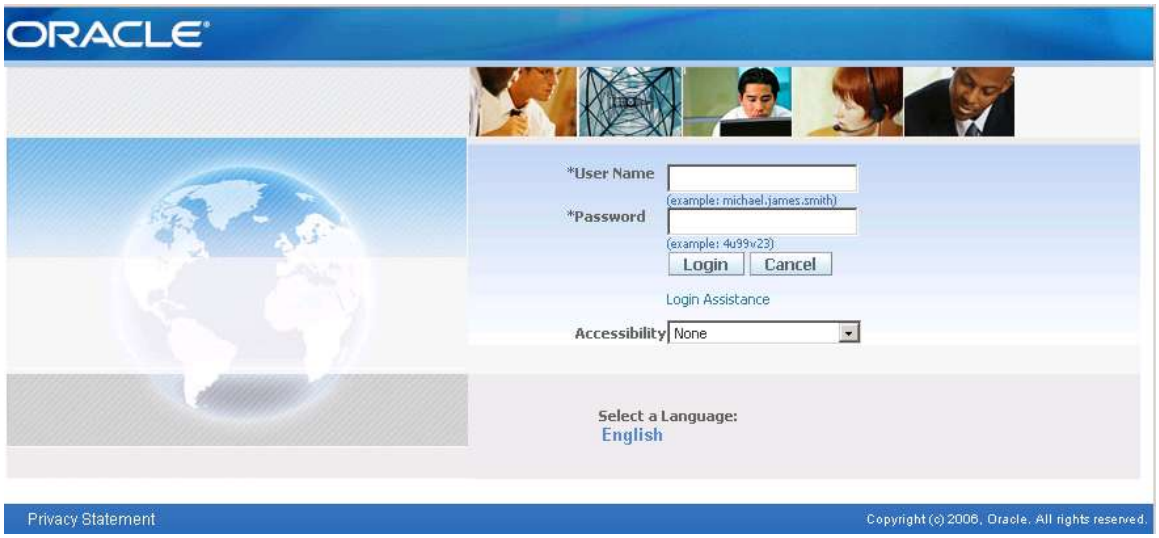
More information on the AMMS System is available on the AMMS web site http://amms/

Step 1A: Access the AMMS System Web Site

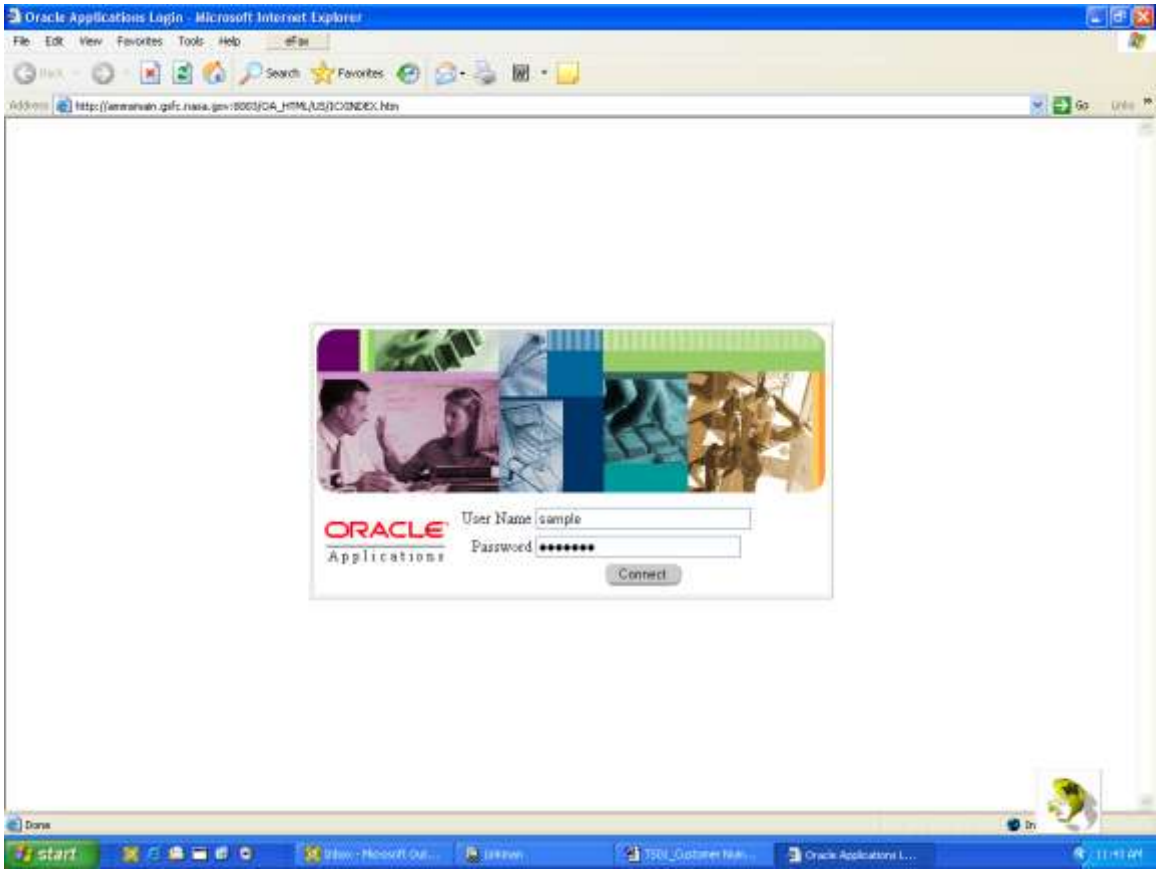
7. From your web browser, enter the following URL to access the AMMS system:

   http://amms.gsfc nasa.gov

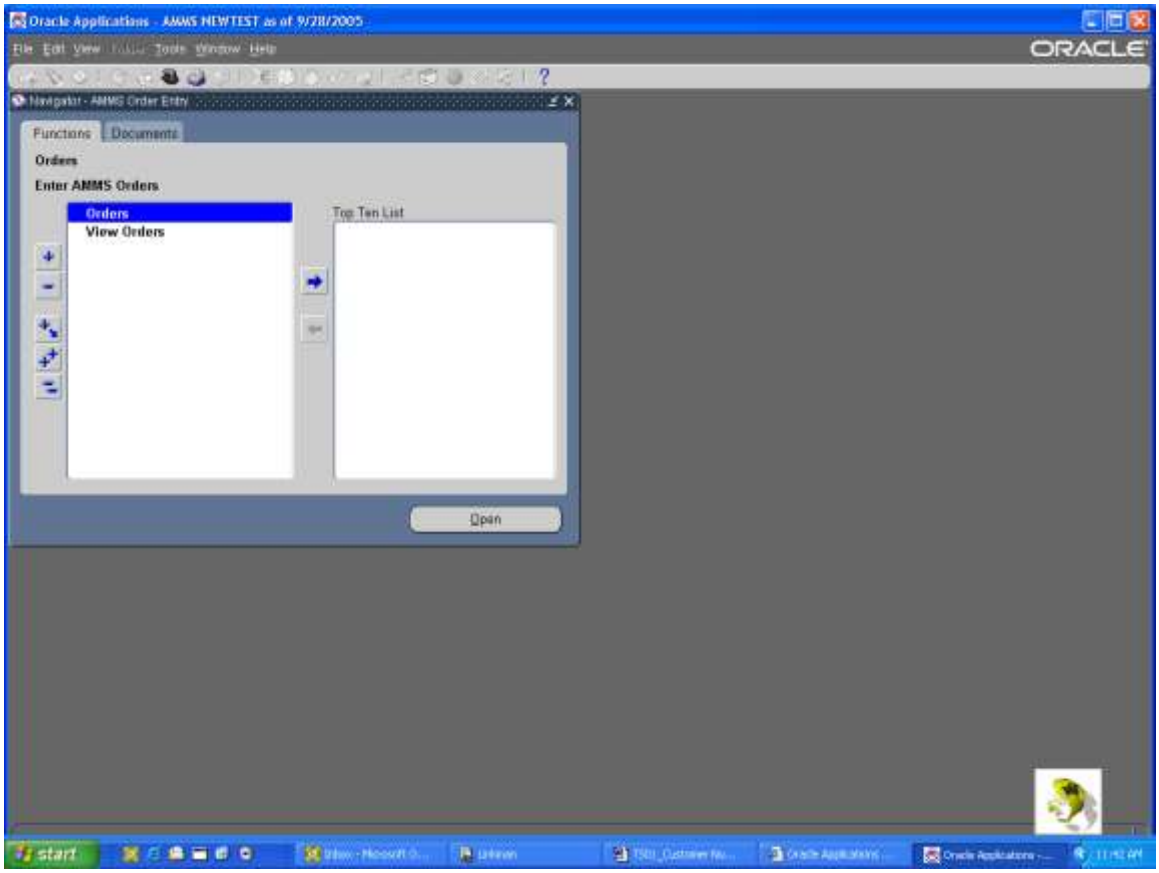
   Click on "AMMS Order Entry Login", click OK on the government warning box then following screen should appear:



8. Enter your AMMS userid and password in the fields on the screen and then click on the **Connect** button. Note, your password will not display in text but will display as asterisks (*).



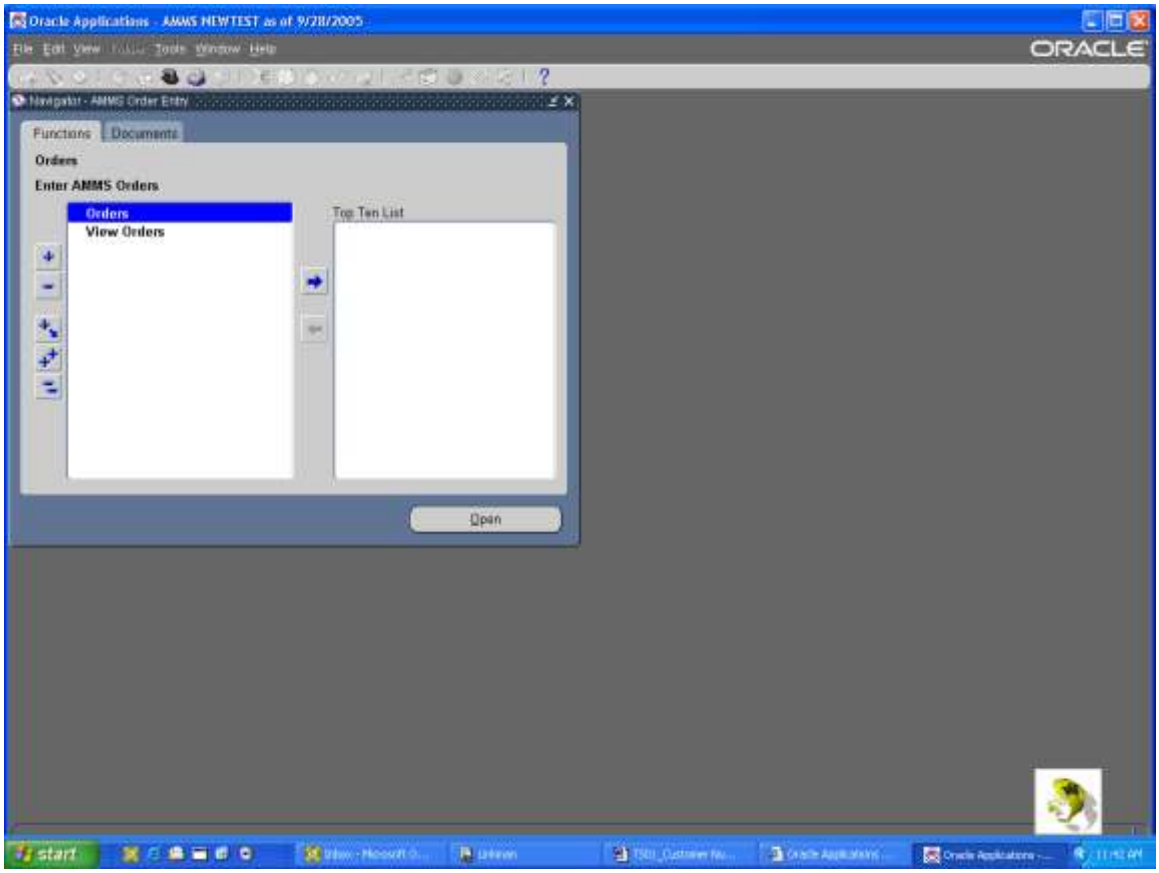
9. The AMMS Function menu will appear:



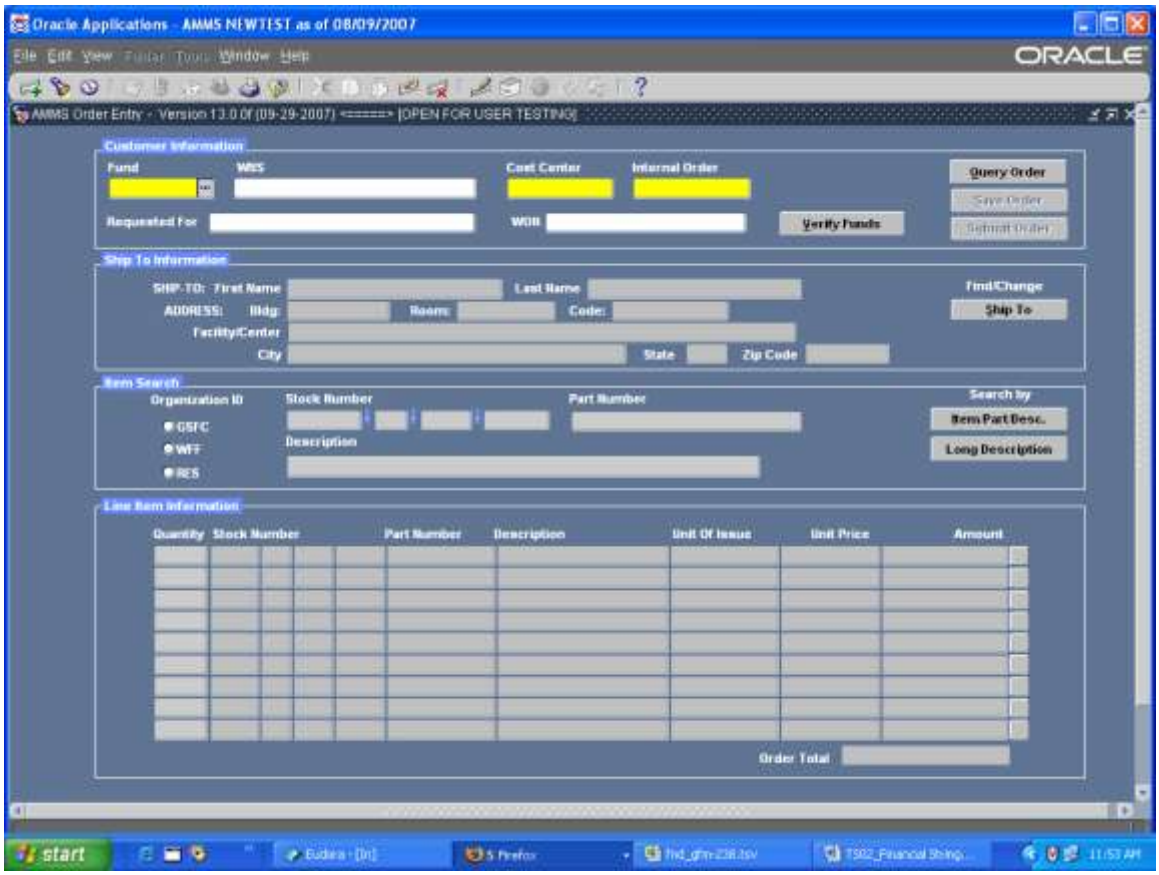
Step 1B: Navigating to the AMMS Order Entry Screen

Once you have successfully accessed the AMMS system and the list of available functions are displayed, you are ready to navigate to the AMMS Order Entry screen.

7. The AMMS function menu should appear:



8. Click on **Orders** to highlight it and then press **Open** to go to the AMMS Order Entry screen. The following screen should appear:



9. You are now ready to begin placing orders in the AMMS Order Entry form

Task 2: Entering AMMS Orders Using the SAP Financial String

The SAP Financial String consists of the Fund, WBS, Cost Center and Internal Order.

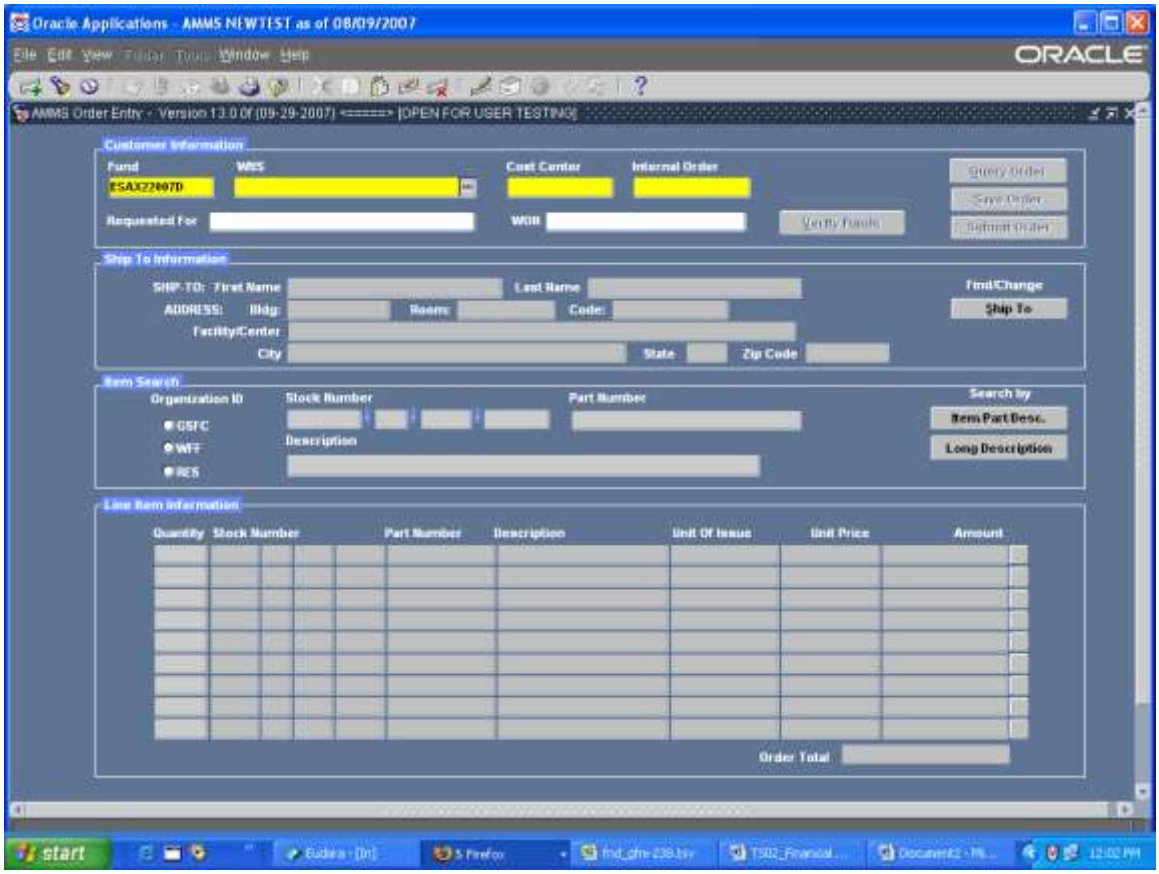
Note: *An "active customer" is an AMMS defined customer who is assigned a valid FY07 or FY08 SAP financial string. Customers from previous years or who no longer have funding are marked "inactive" in the AMMS system and may not order additional supplies.*

Step 2A: Entering a Fund

Specifying the Fund

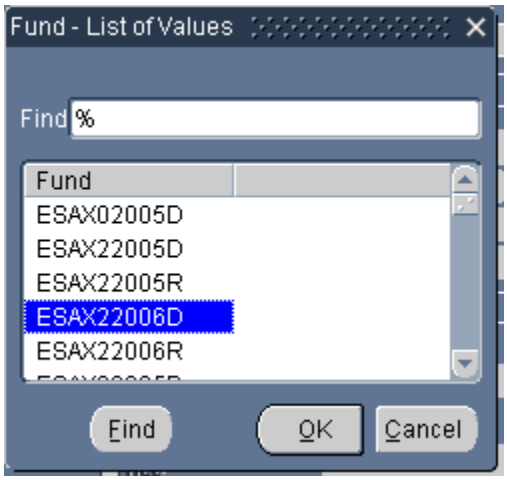
If you know the specific Fund for the customer, then you can enter it directly in the AMMS Order Entry form:

10. Enter the specific Fund in **Fund** field.



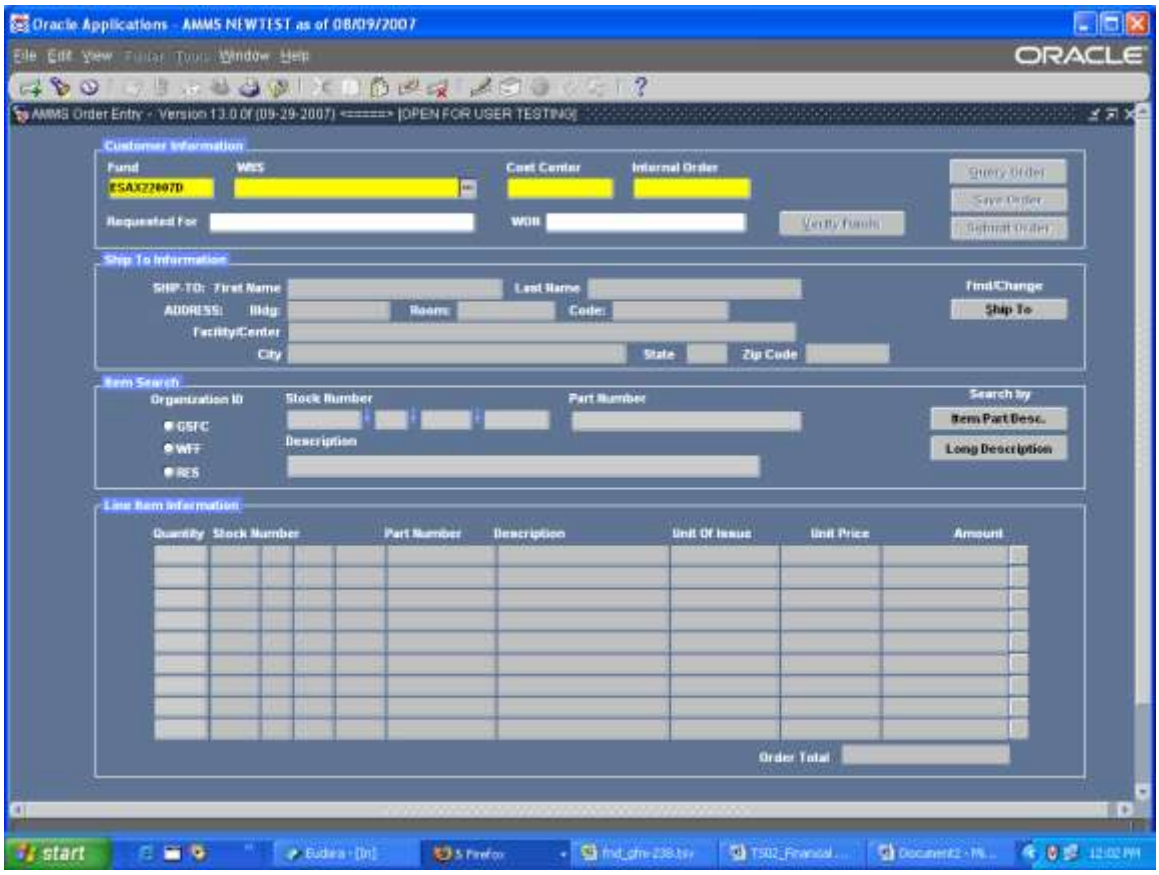
11. If you don't know the specific Fund number, click on the drop down button on the right side of the field and a listing of Funds will appear.

12. If using the List of Values, scroll down until you see your fund and click on the line to select it. To shorten the List of Values, type the first few characters in the Find line before the '%'.



13. Click **Ok**.

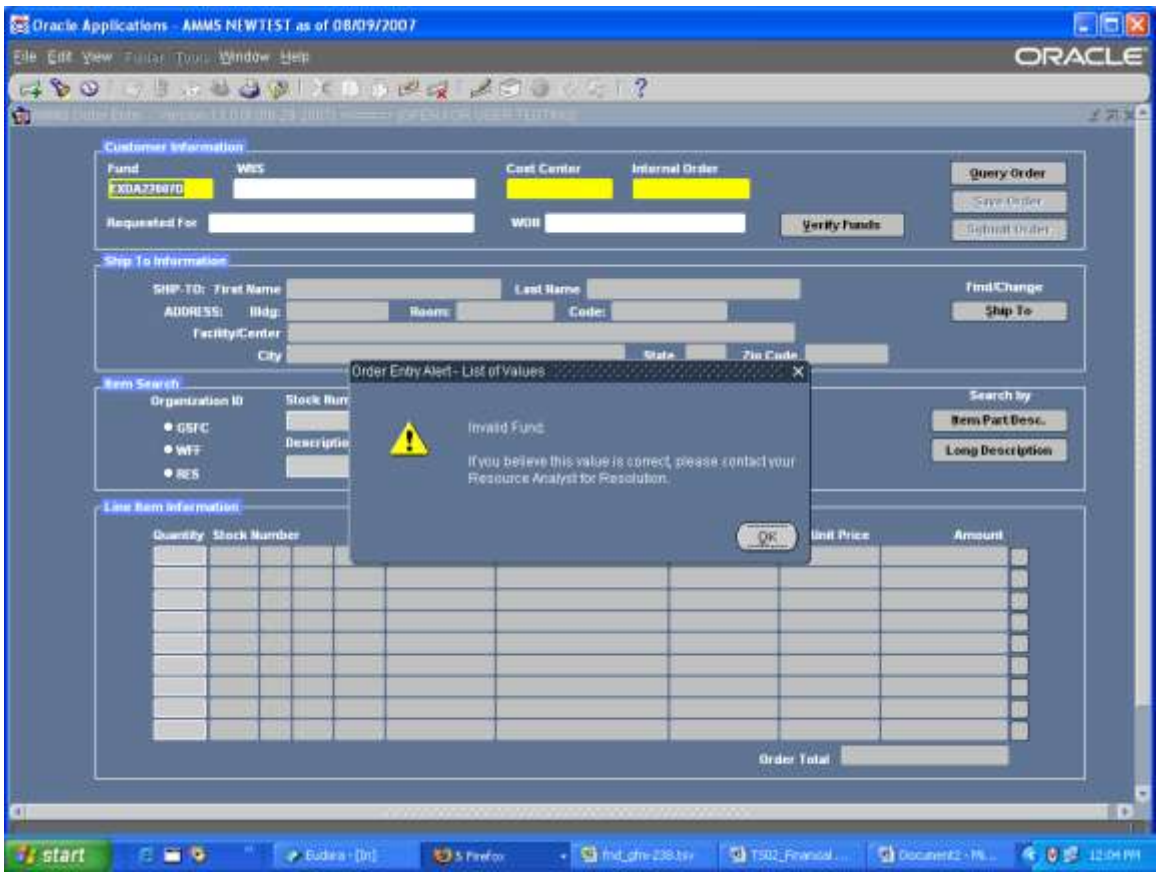
14. The Fund number will be accepted and the cursor will move to the WBS field, which is now highlighted in yellow.



Common Error Messages For Fund Entry

Invalid Fund Number

4. If the Fund number is not valid, this Order Entry Alert will appear:

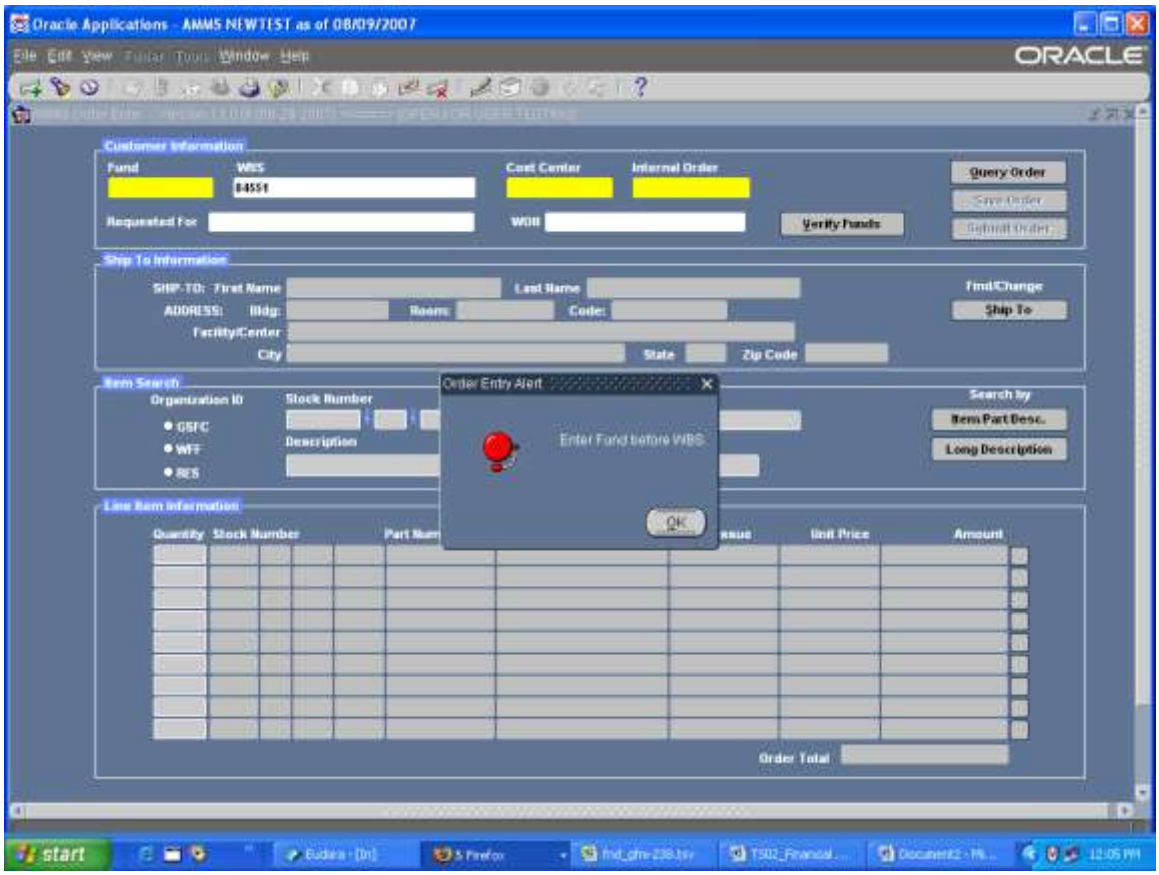


5. Click the **OK** button and you will be returned to a blank form.

6. If your entry was a typographical error, try again or use the List of Values button as described on the previously.

Entering the WBS First

3. Trying to enter a WBS without entering a Fund first:



4. Click **OK** to clear the alert window and you are returned to the Fund field.

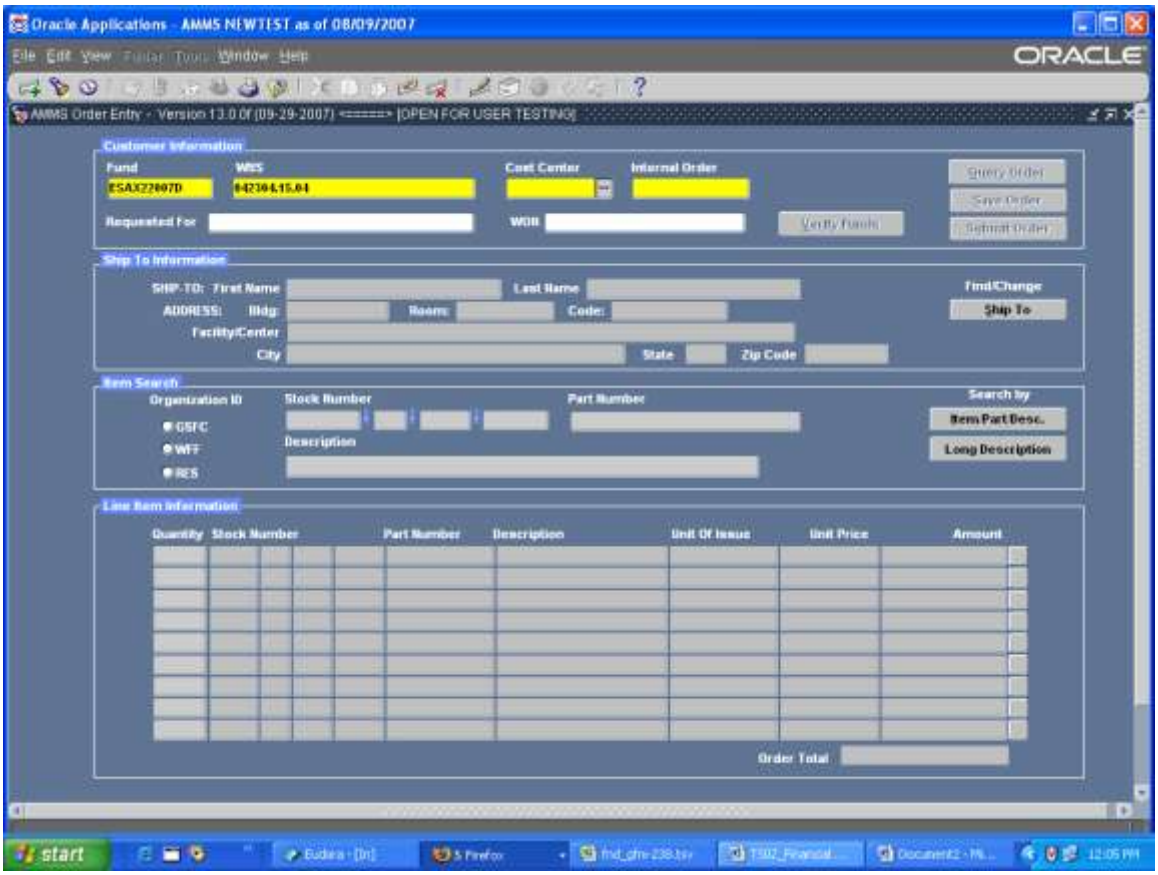
Step 2B: Entering the WBS

Not all financial strings require a WBS. If you are using Pool Money from FY2005, a WBS is not required; otherwise you will have a WBS as part of your financial string.

If you do not need to enter a WBS number (Pool money and FY2005 or before), proceed to *Step 2C Entering the Cost Center*.

Specifying the WBS

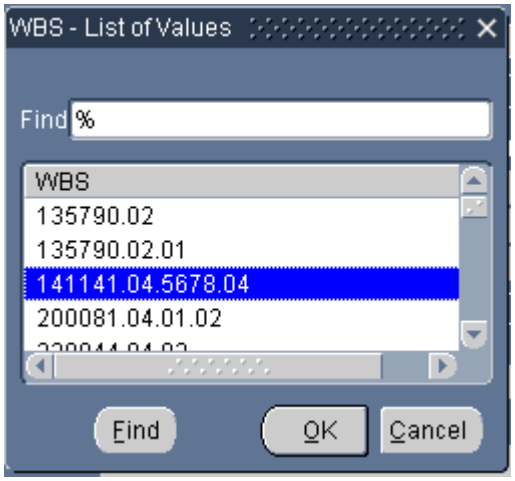
6. Enter the specific WBS in the **WBS** field.



7. If you don't know the specific WBS number, click on the drop down button on the right side of the field and a listing of WBSs will appear.

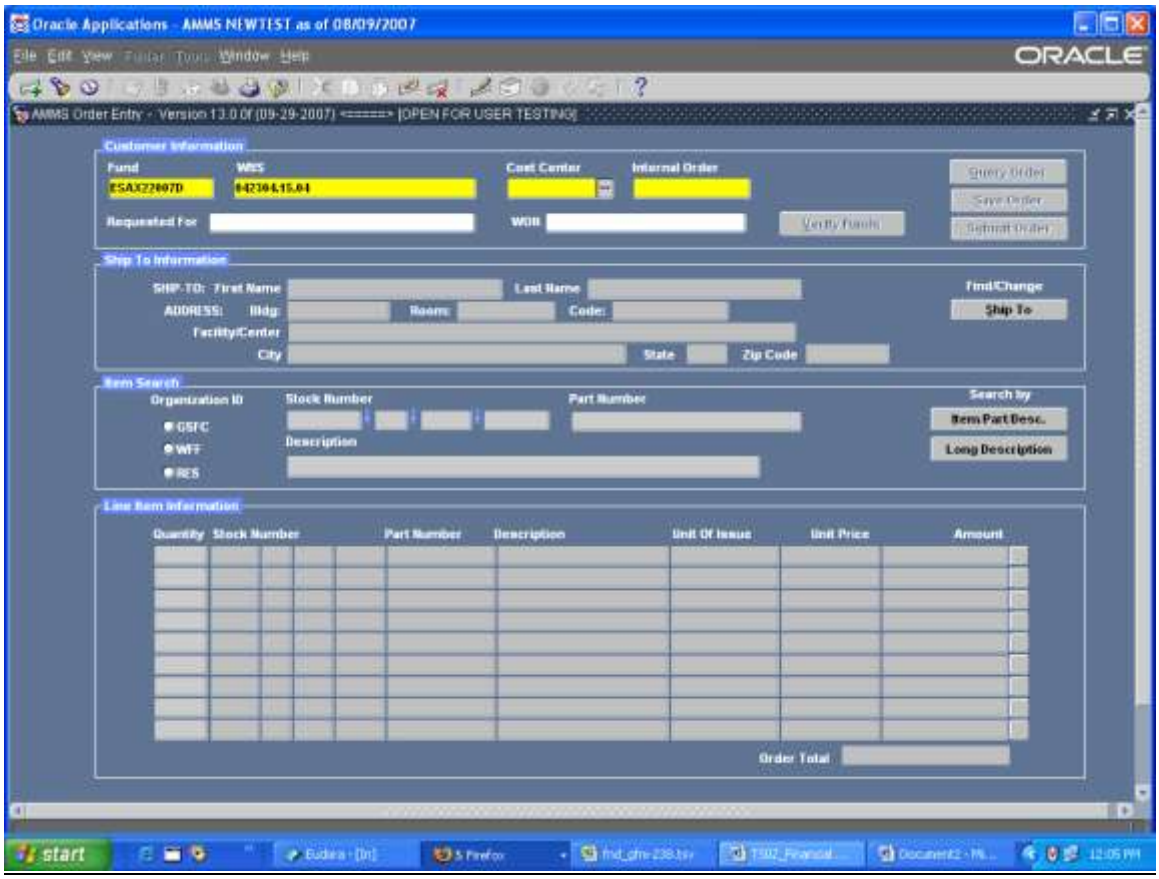
8. If using the List of Values, scroll down until you see the WBS and click on the line to select it. To shorten the List of Values, type the first few characters in the Find line before the '%'.

Note: *this can be a very long list, it is best to enter at least a part of the WBS number to shorten the list.*



9. Click **Ok**.

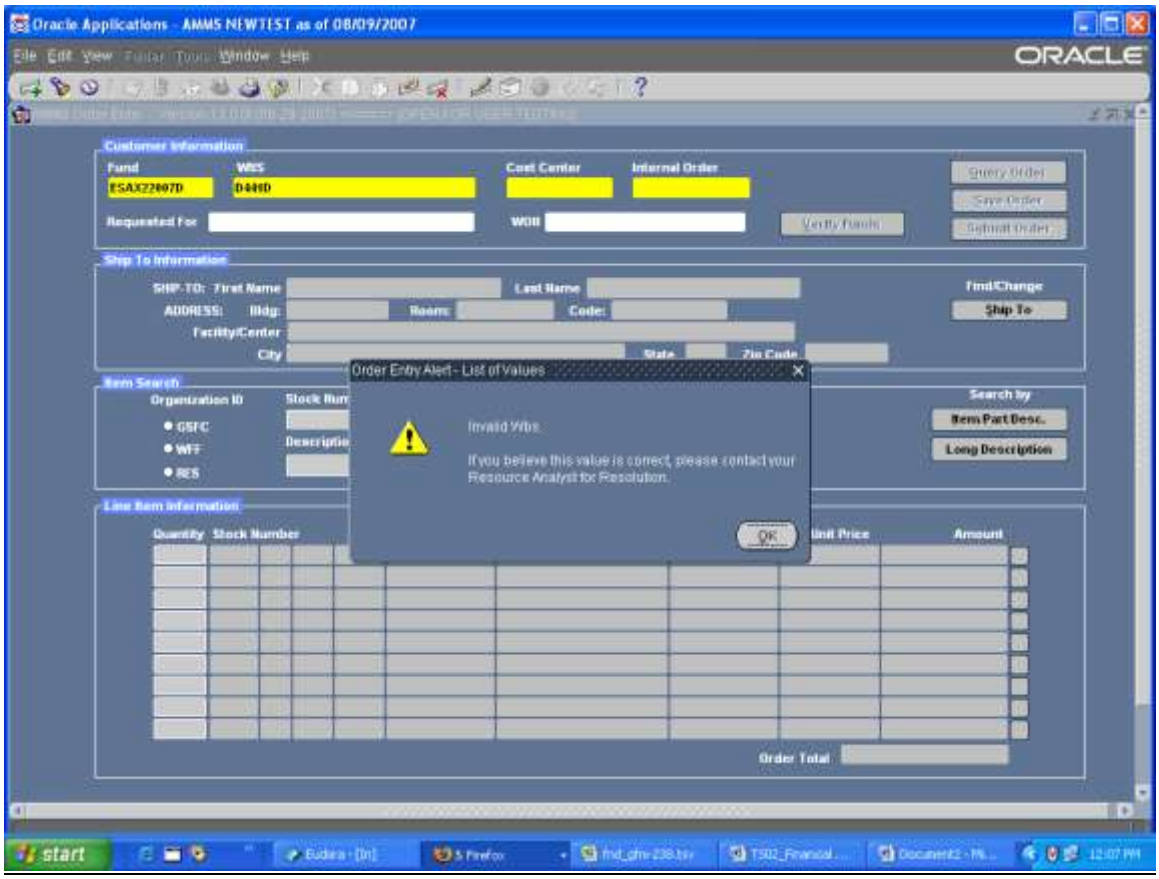
10. The WBS number will be accepted and the cursor will move to the Cost Center field, which is now highlighted in yellow.



Common Error Messages for WBS Entry

Invalid WBS Number

4. If you enter a WBS number without using the List of Values and it is not valid, this Order Entry Alert will appear:

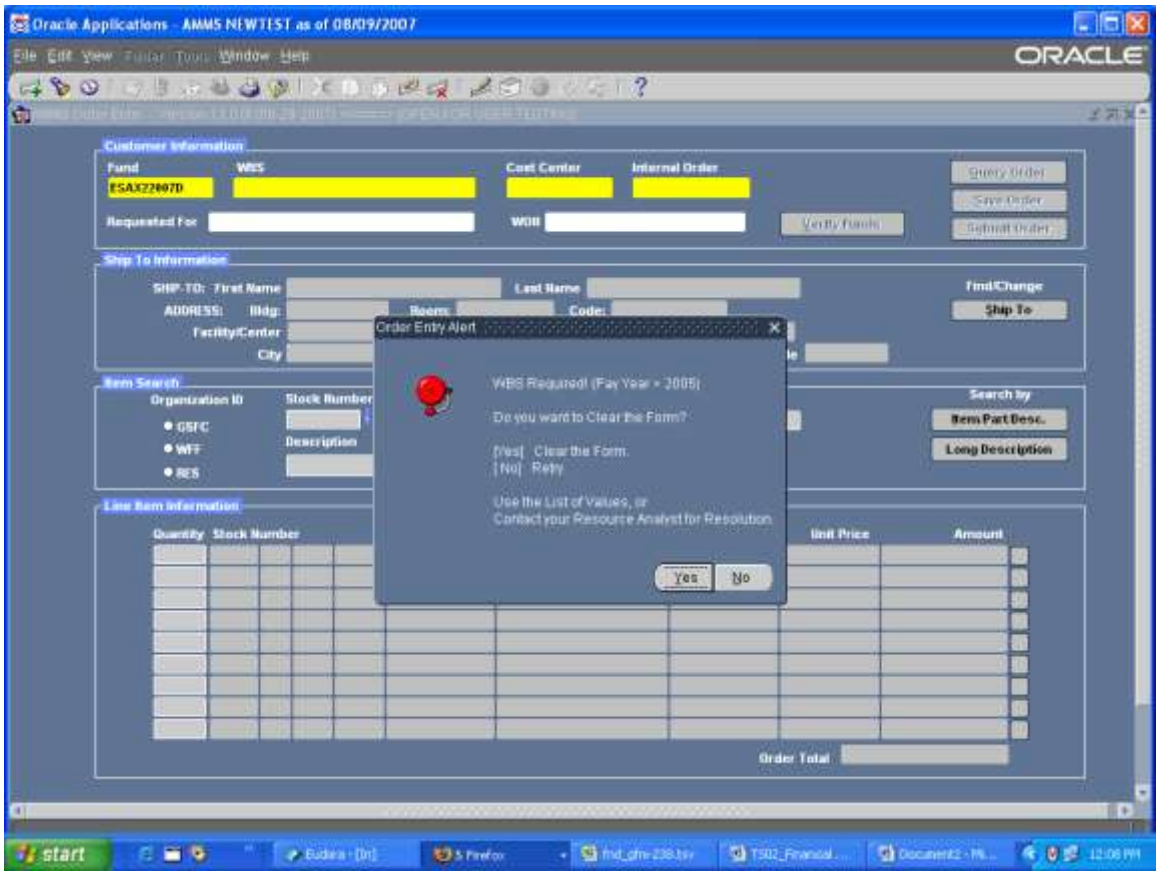


5. If you mistyped the WBS number, click the No button in the alert window. You will be returned to a blank WBS field. You can try re-entering your number or select one from the List of Values.

6. If the you believe you entered a valid WBS, click the Yes button in the alert window and all the fields in the form will be cleared. You will need to resolve this entry with your Resource Analyst.

Required WBS Not Specified

4. You did not enter a WBS after entering a 2006 (and beyond) Fund and tried to move the cursor to the Cost Center field:



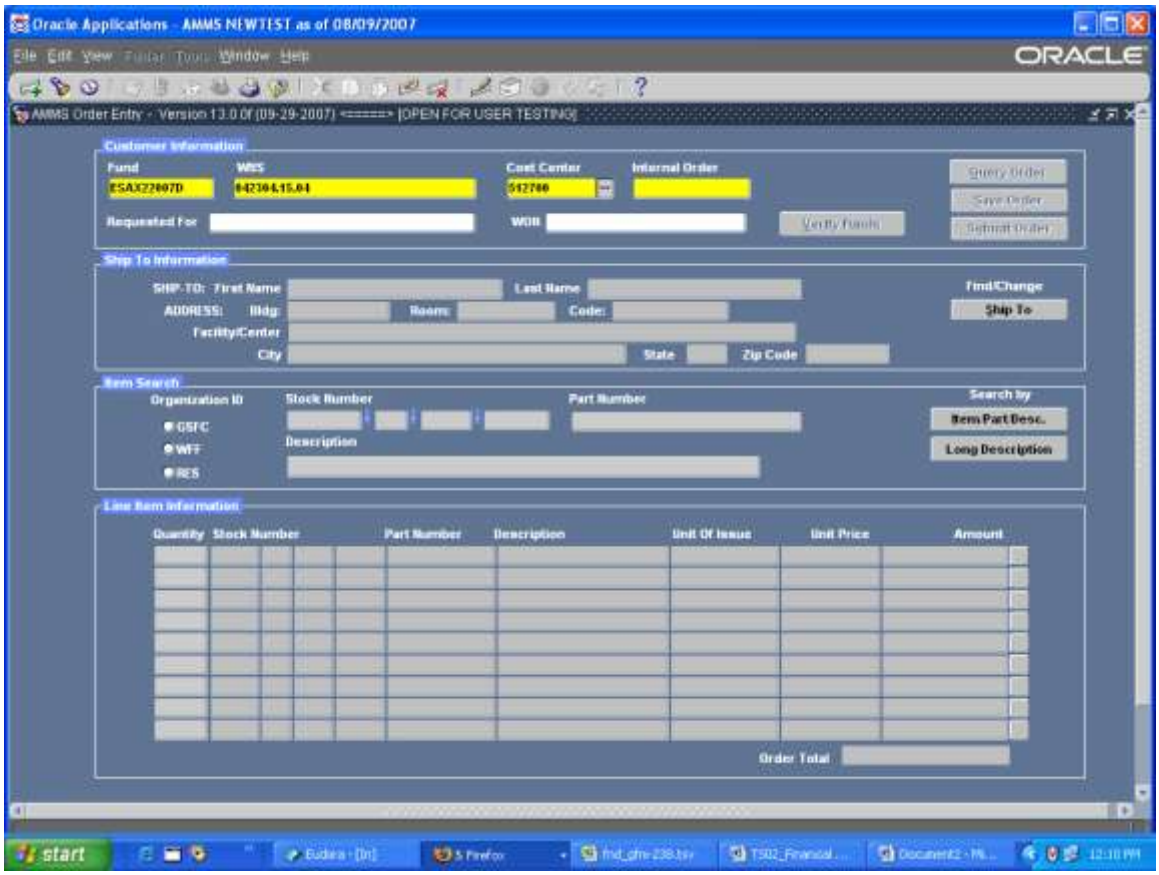
5. If you skipped past the WBS field by mistake, click the No button in the alert window and you will be returned to the WBS field so that you can enter a value.

6. If you meant to enter a Fund for 2005 or before, or believe there is some other problem, click Yes and all fields of the form will be cleared. If it is some other problem, you will need to work with your Resource Analyst to resolve it.

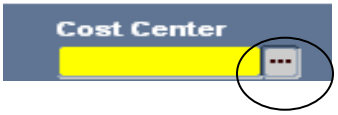
Step 2C: Entering Cost Center

Specifying the Cost Center

6. Enter the specific Cost Center in the **Cost Center** field:

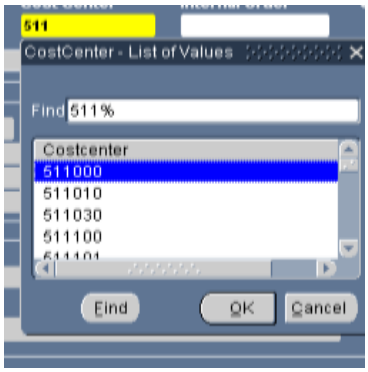


7. If you don't know the specific Cost Center number, click on the drop down button ... on the right side of the field and a listing of Cost Centers will appear.



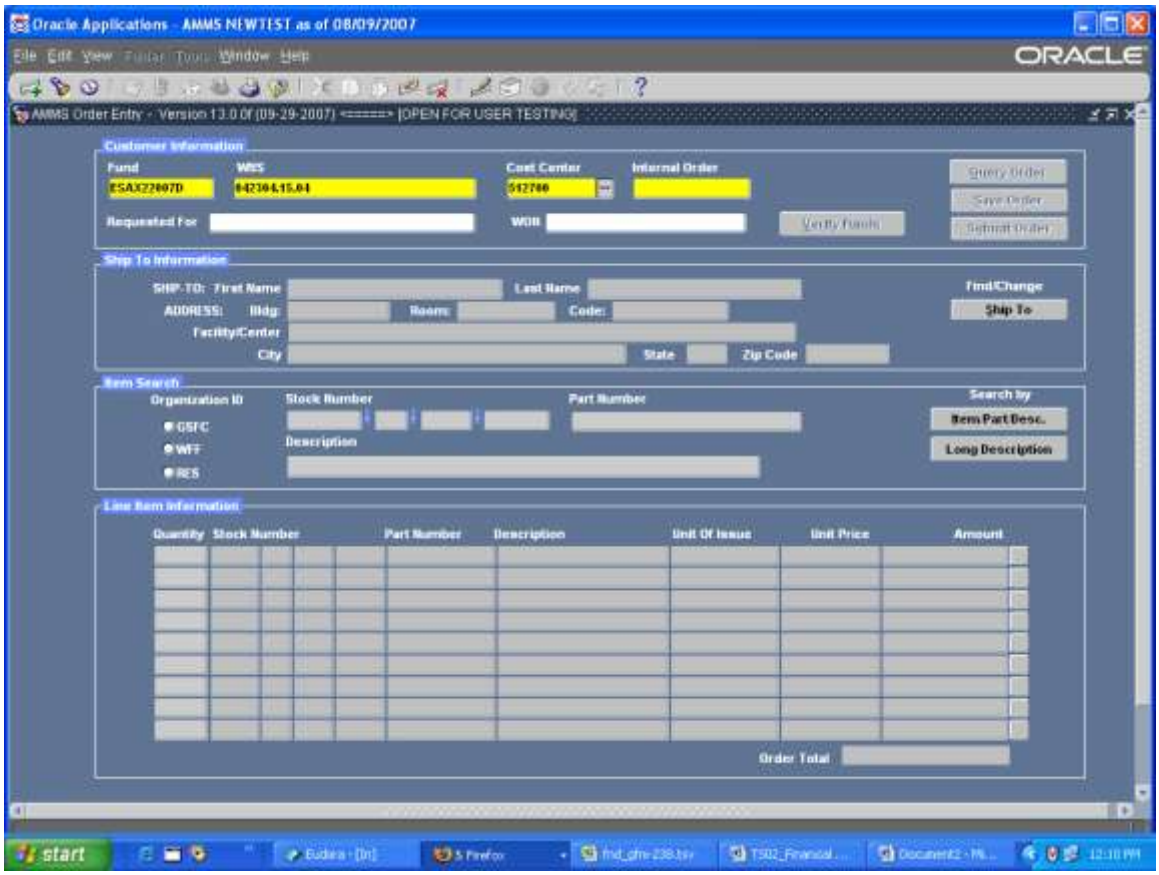
8. If using the List of Values, scroll down until you see the Cost Center and click on the line to select it. To shorten the List of Values, type the first few characters in the Find line before the '%'.

Note: *this can be a very long list, it is best to enter at least a part of the Cost Center number to shorten the list.*



9. Click **Ok**.

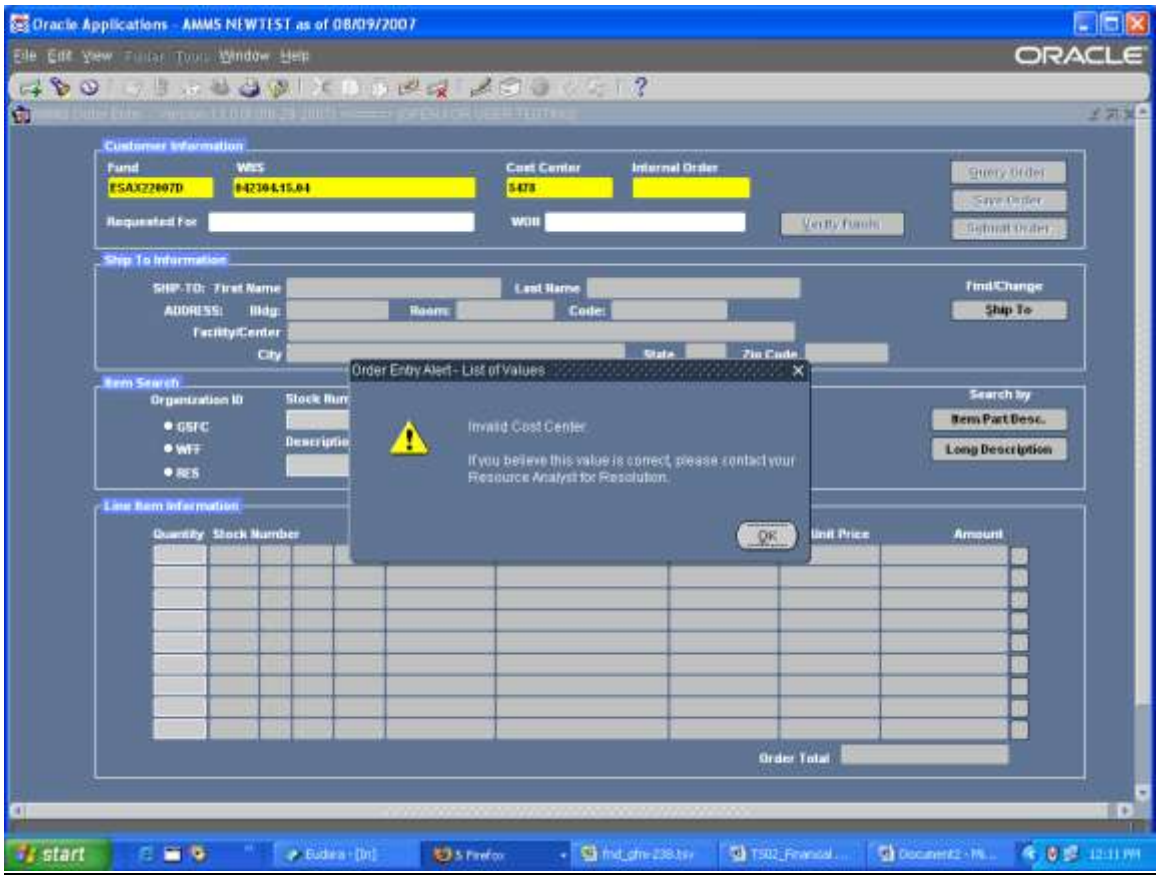
10. The Cost Center number will be accepted and the cursor will move to the Internal Order field, which is now highlighted in yellow.



Common Error Messages for Cost Center Entry

Invalid Cost Center

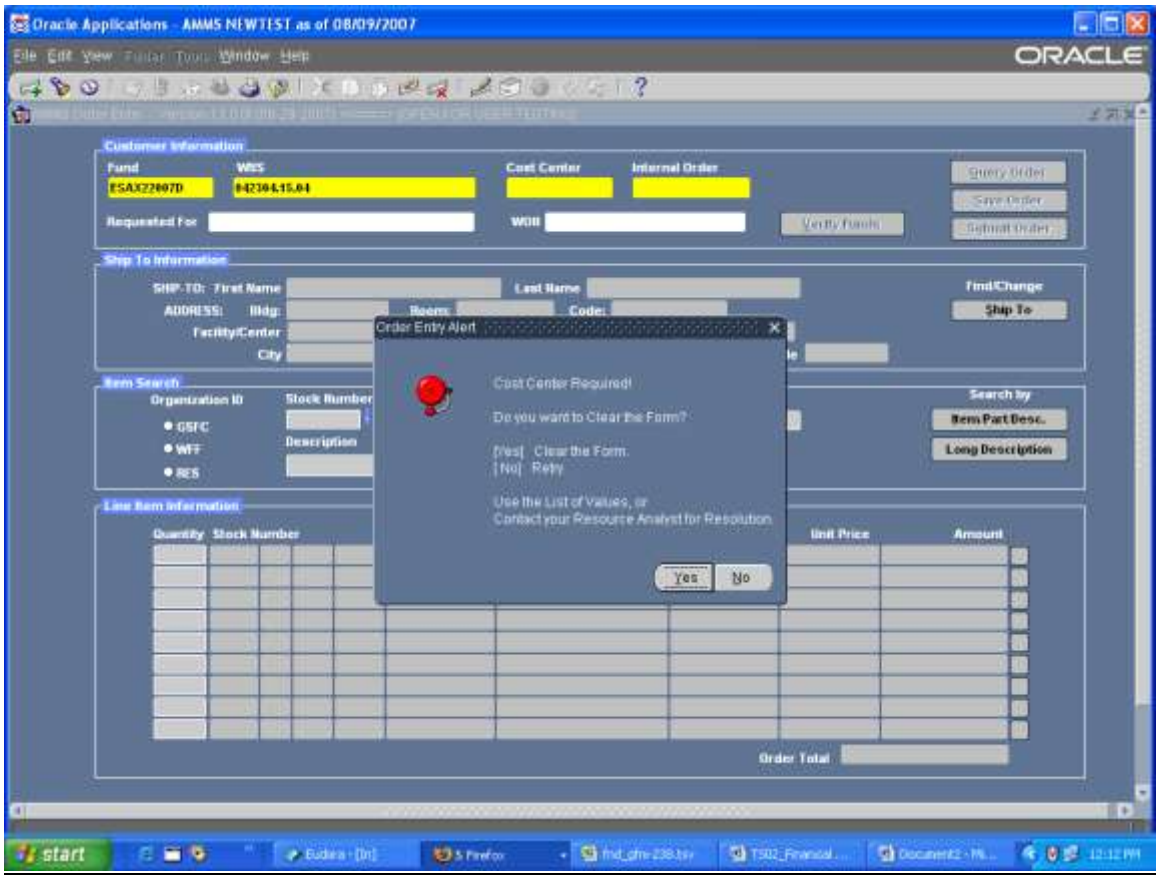
3. If you entered a Cost Center value with using the List of Values and it is not valid, this Order Entry Alert will appear:



4. Click the **OK** button in the alert window and you will be returned to a blank Cost Center field. If you believe the Cost Center you entered is valid, contact your Resource Analyst to resolve.

No Cost Center Specified

4. You moved the cursor to the Internal Order field without entering a Cost Center value:



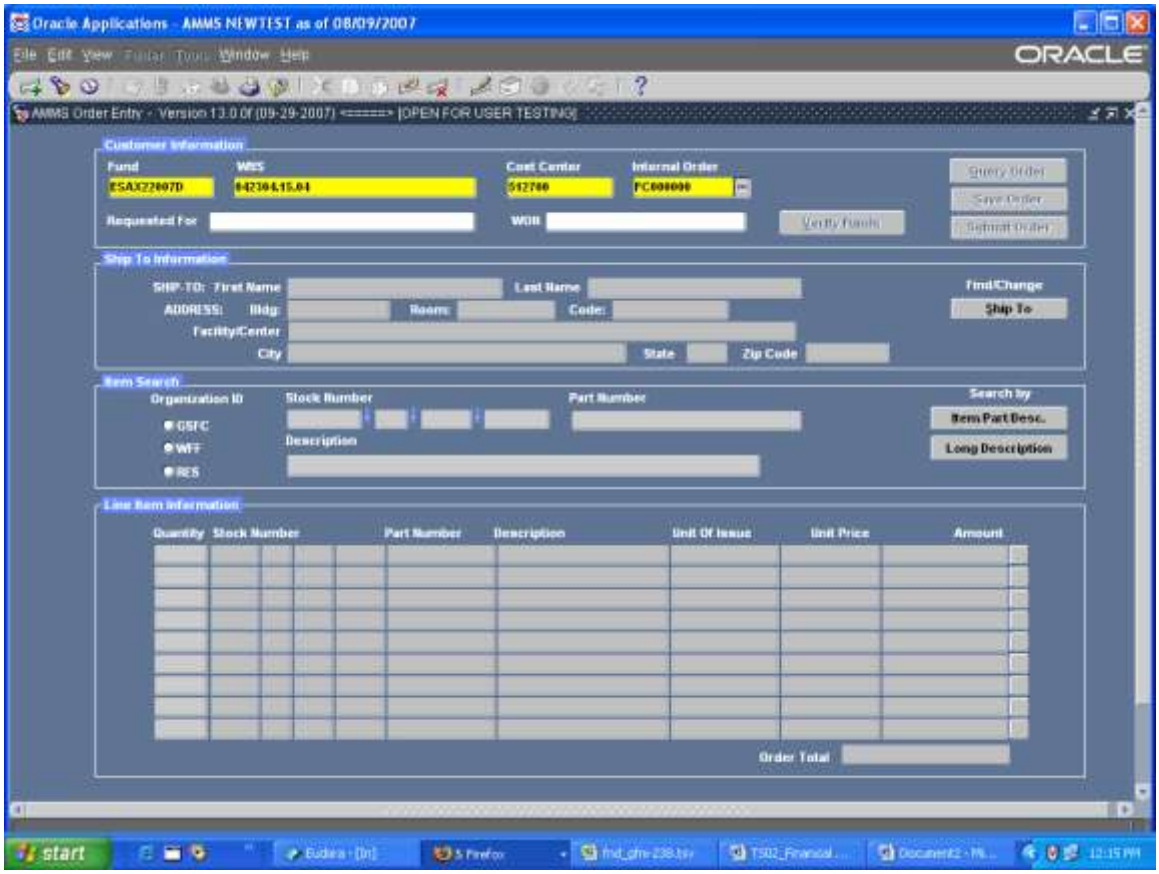
5. If you skipped the field by mistake, click the No button in the alert window. You will be returned to the Cost Center field and you can enter a value.

6. If there is some other problem, click the Yes button in the alert window. Contact your Resource Analyst to resolve the matter.

Step 2D: Enter Internal Order

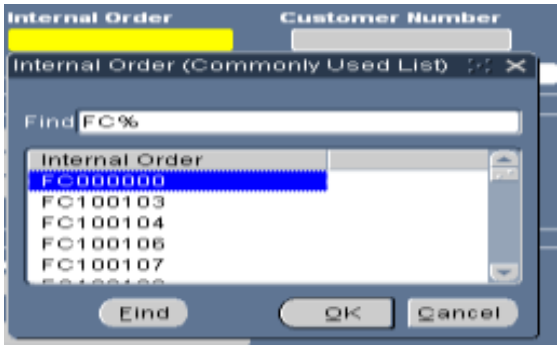
Specify an Internal Order

6. Enter the specific Internal Order in the **Internal Order** field:



7. If you don't know the specific Internal Order number, click on the drop down button on the right side of the field and a listing of Internal Orders will appear.

8. If using the List of Values, scroll down until you see your Internal Order and click on the line to select it, then click the OK button. To shorten the List of Values, type the first few characters in the Find line before the '%'.

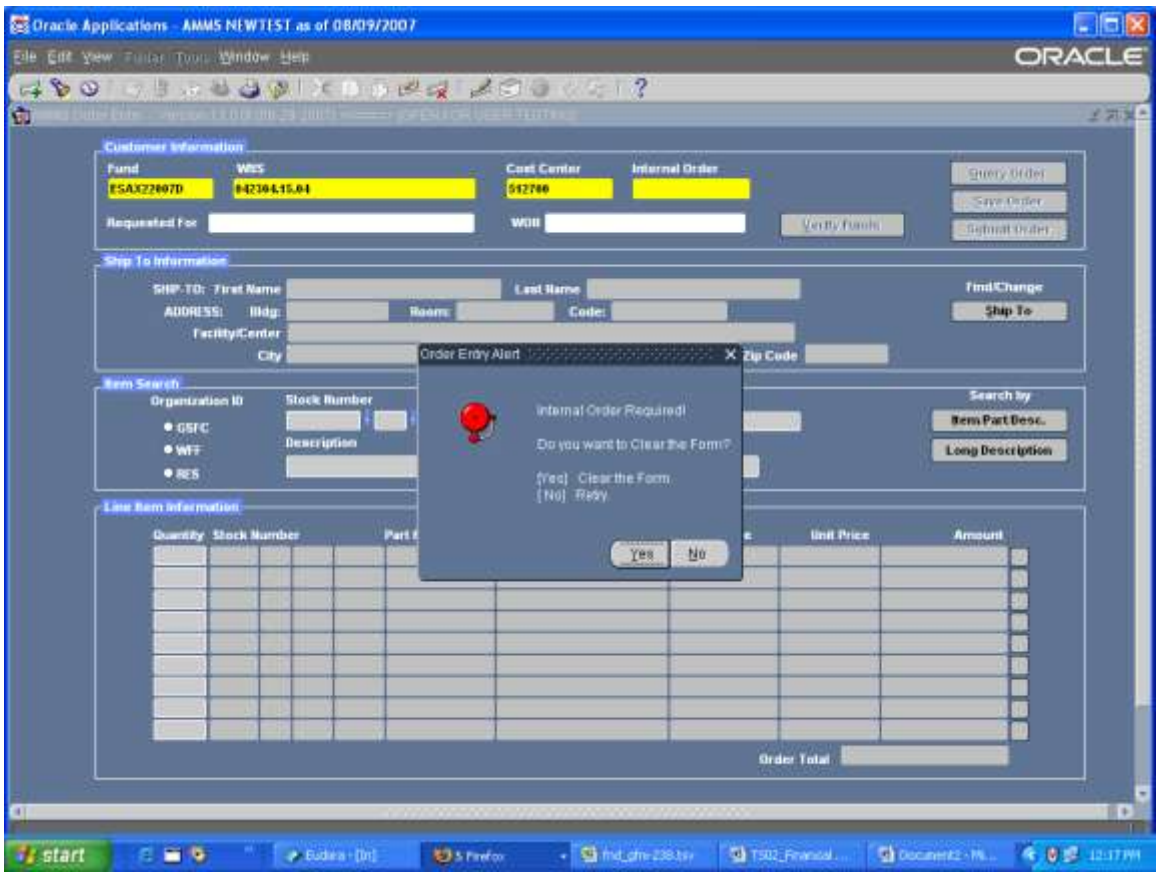


9. Click **Ok**. The Internal Order number will be accepted.

Common Errors for Internal Order Entry

Internal Order Not Specified

4. You moved the cursor to the **Requested For** field without entering an Internal Order value:



5. If you skipped the field by mistake, click the **No** button in the alert window and you will be returned to the Internal Order field.

6. Otherwise, click the **Yes** button and all of the form fields will be cleared.

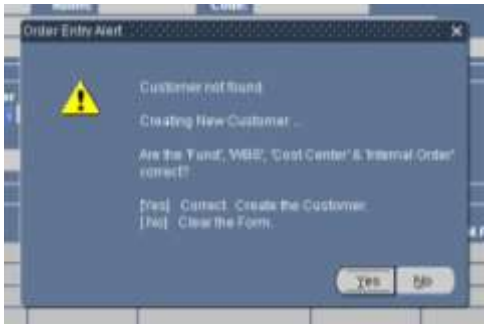
7. At this point you can enter information in the Requested For field. This will allow you to know who the original requestor was for the items being ordered.

Step 2E: Processing the Financial String Selection

5. At this point you have entered all required fund string data. Click the **Verify Funds** button. This is where the first funds verification will occur. If sufficient funds are available and this is the first time this customer financial information is being used in AMMS, you will need to "create" a customer. Oracle will ask if the entered information is correct and whether to create a customer. Select **Yes** if correct or **No** if incorrect.

WARNING: *If you select* ***No****, this will clear the form.*

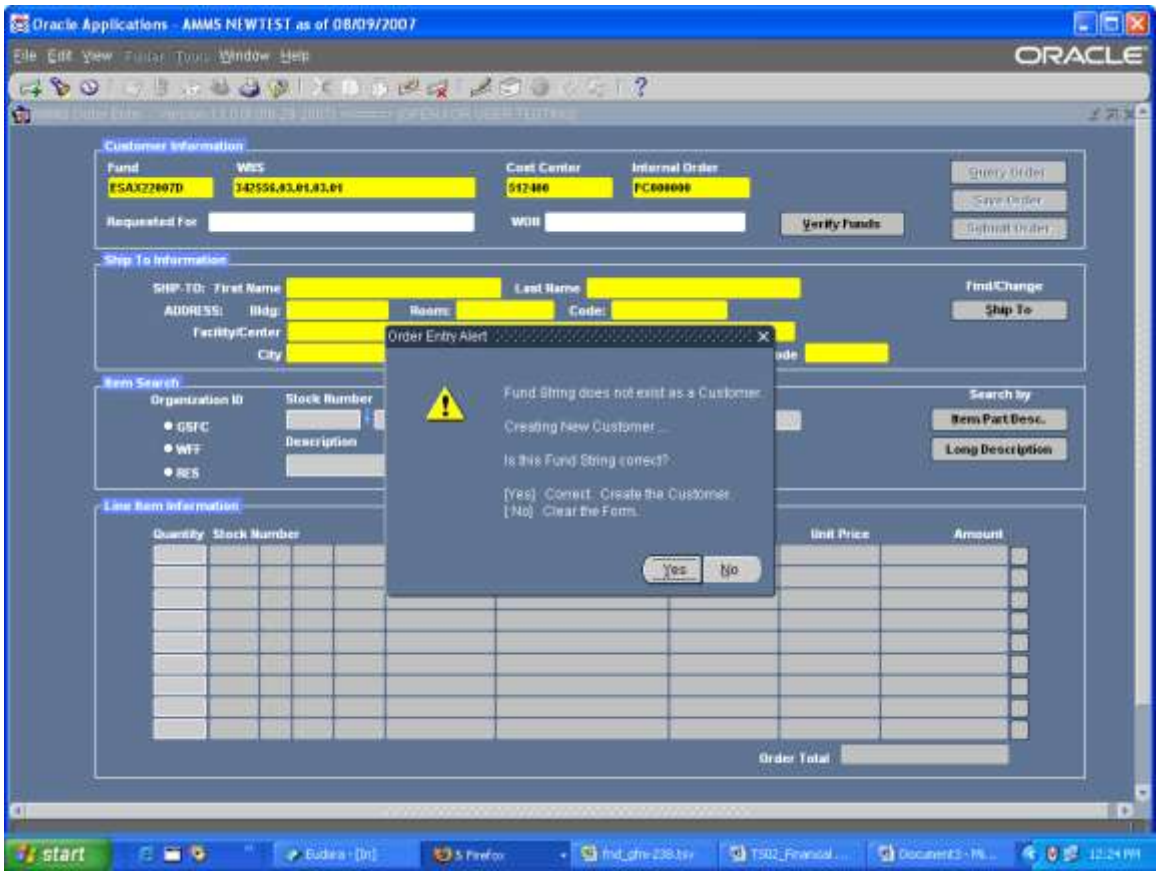
6. The Order Entry Alert window will open asking if the information entered is correct.



7. Click the **Yes** button in the alert window if the information you entered is correct. Behind the scenes Oracle will create a customer.

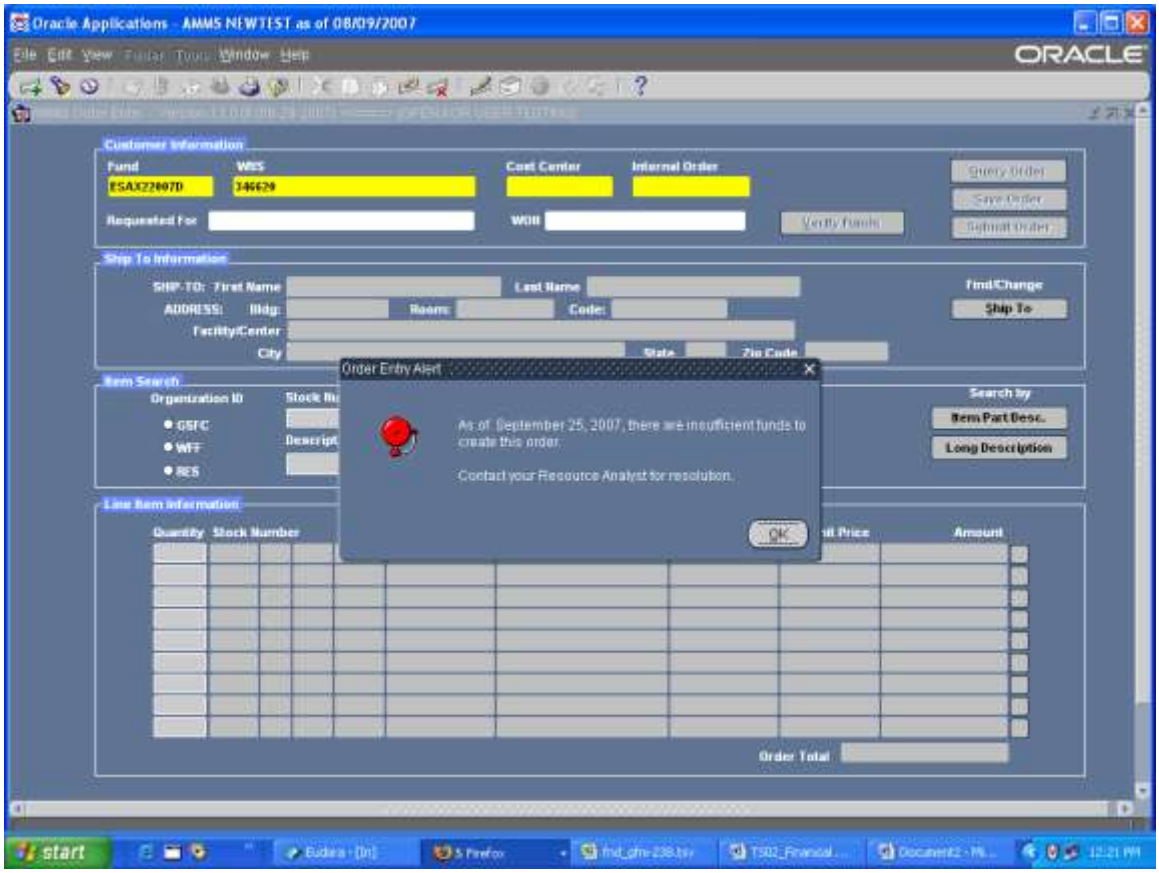
   If the information you entered is not correct, click the **No** button in the alert window. This will clear all fields in the form and you can start over.

8. If you selected Yes, you will be prompted to enter an address. See section *Task 3 Updating the Ship To Information* on how to add a address for this customer



Step 2F: Insufficient Funds Message

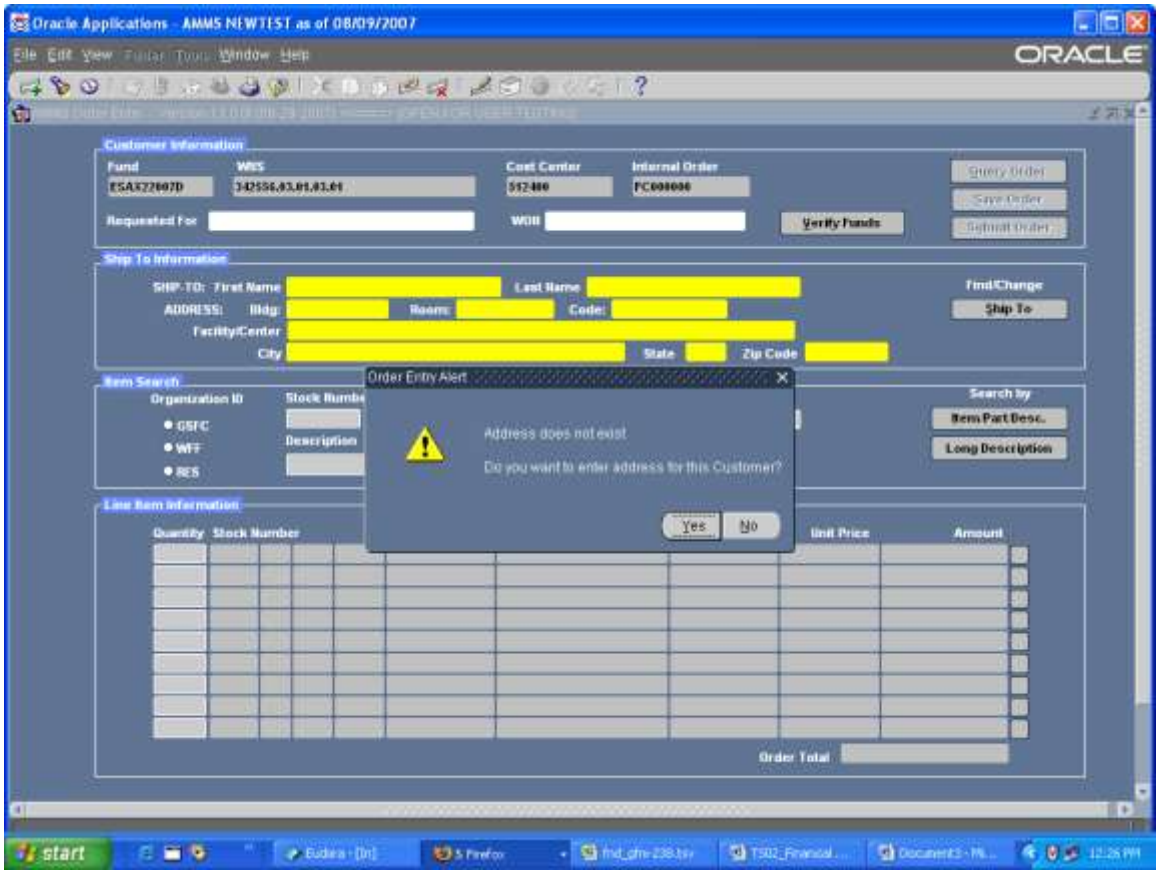
After you have entered all of the financial information and click on the Verify Funds button, if there are no funds available in the Inventory Pool for the specific Funded Program the following message will appear:



You will have to contact your Resource Analyst for resolution. The Resource Analyst will have to do a funds transfer into the Inventory Pool in Funds Control.

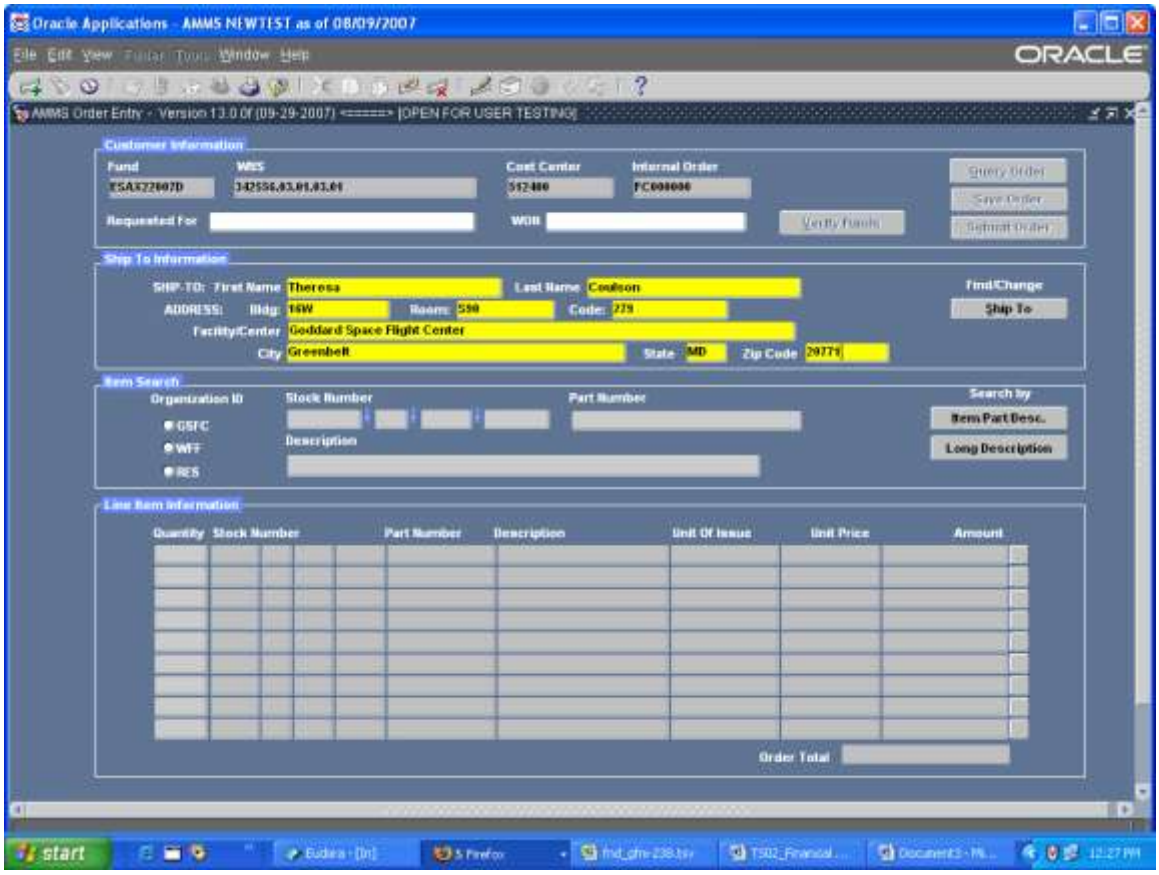
Task 3: Adding the Ship To Information

Since you are adding a new customer to AMMS, you will need to add a new shipping contact for this financial string. Click Yes to the message “do you want to enter an new address for this customer”



3. Fill in the blanks, customers first and last name, building, room, code, facility/center, city, state and zip code. Once you have completed this click in the **Stock Number** field and the address field will become gray.

WARNING: *When specifying your building, room and code, do not add the words "building", "room" or "code" in front of the number. For example, Building 16W should only be specified as 16W in the* ***Building*** *field. Adding any additional words to the address field may cause AMMS to not process your order delaying the receipt of materials to your customer.*

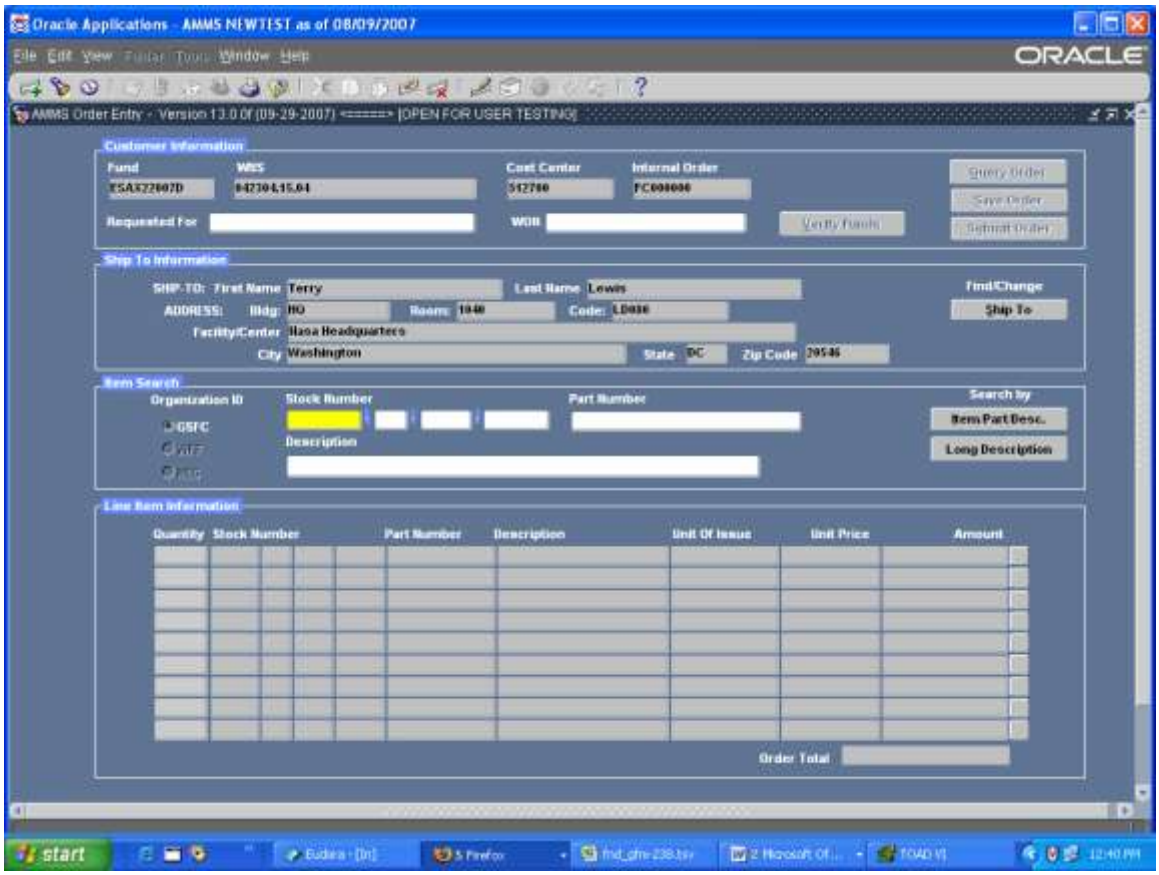


Task 4: Item Search

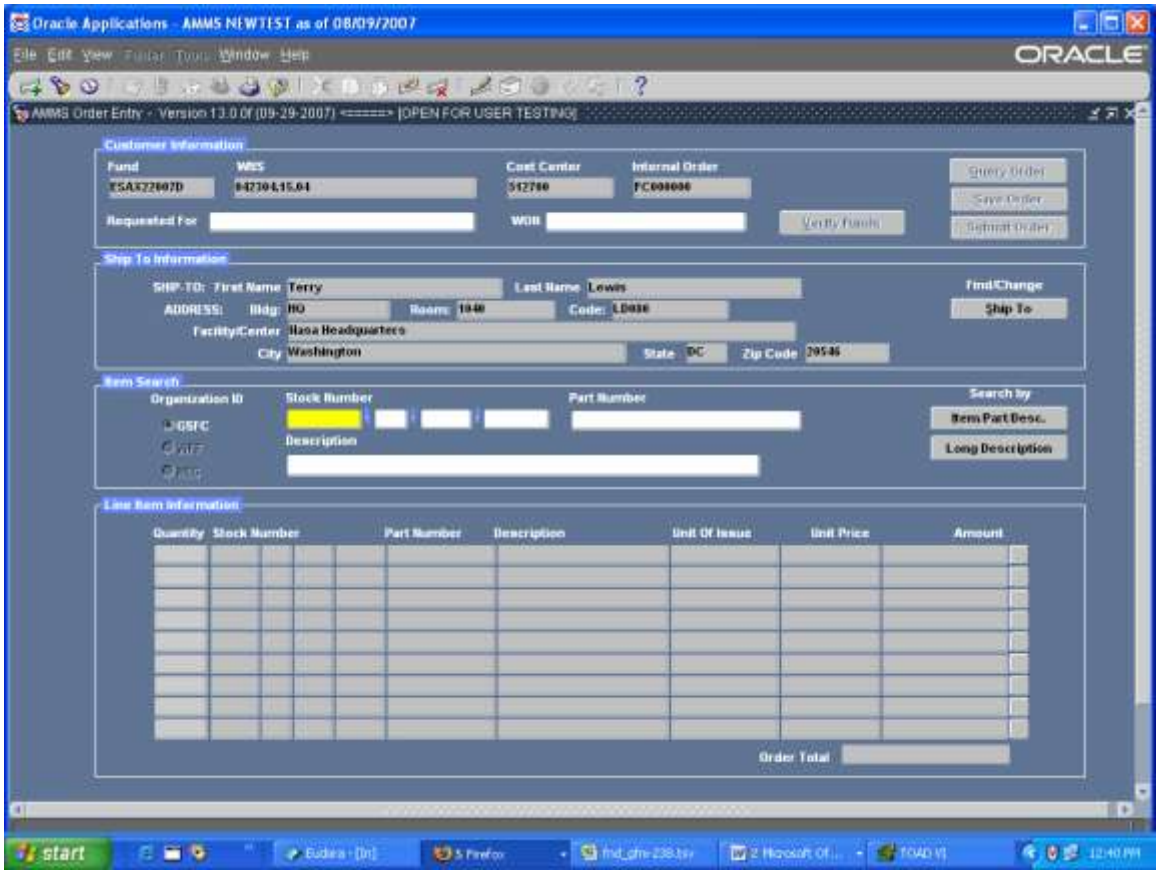
Step 4A: Selecting Your Organization

In order to begin adding stock items to your order, you first select your organization.

5. Click the 'Radio Button' beside your NASA **Organization ID**



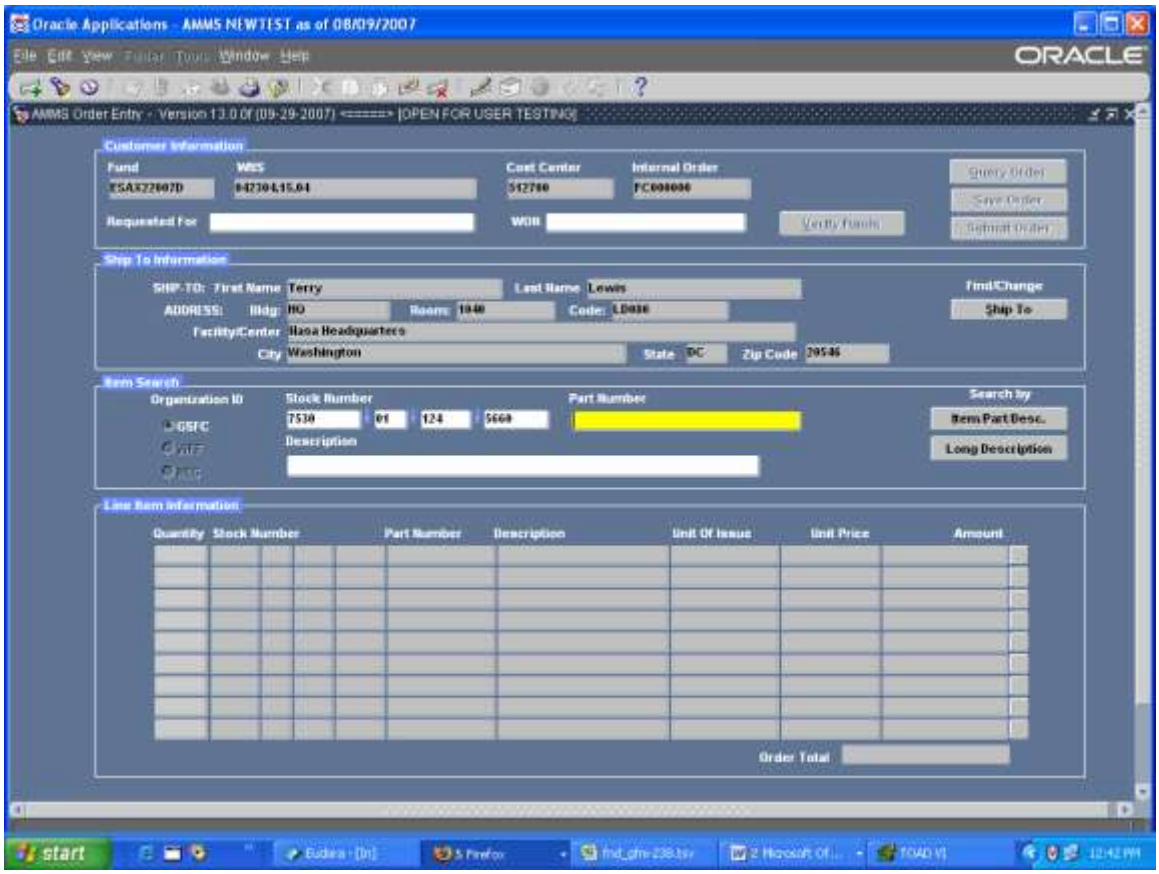
6. The selected NASA Organization ID will be selected and all other options are inactivated.



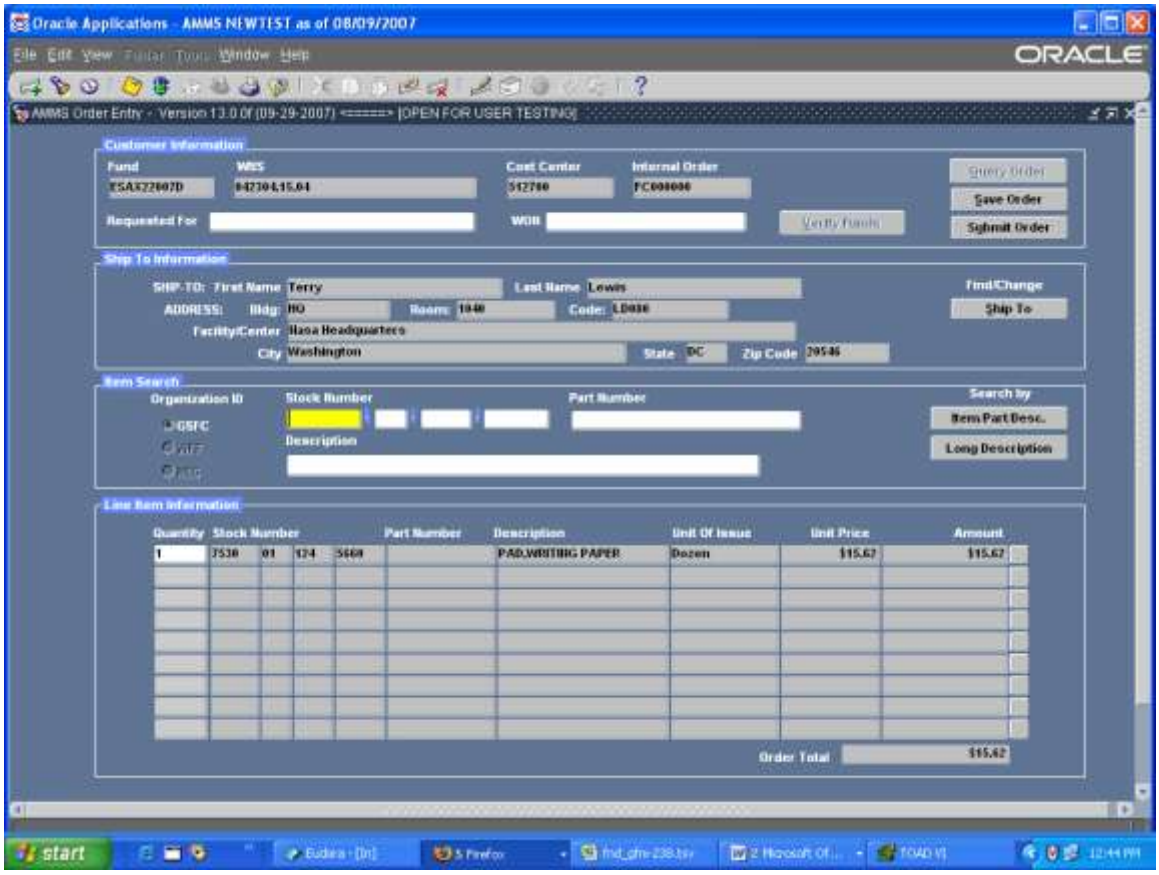
Step 4B: Enter Item Number

To begin ordering items for your customer, you must now specify the item stock number.

5. In the Item Search area, enter the Item Number in the **Stock Number** field, and then click on the **Item/Part/Desc** button.



6. Data will appear in the Line Item Information section.

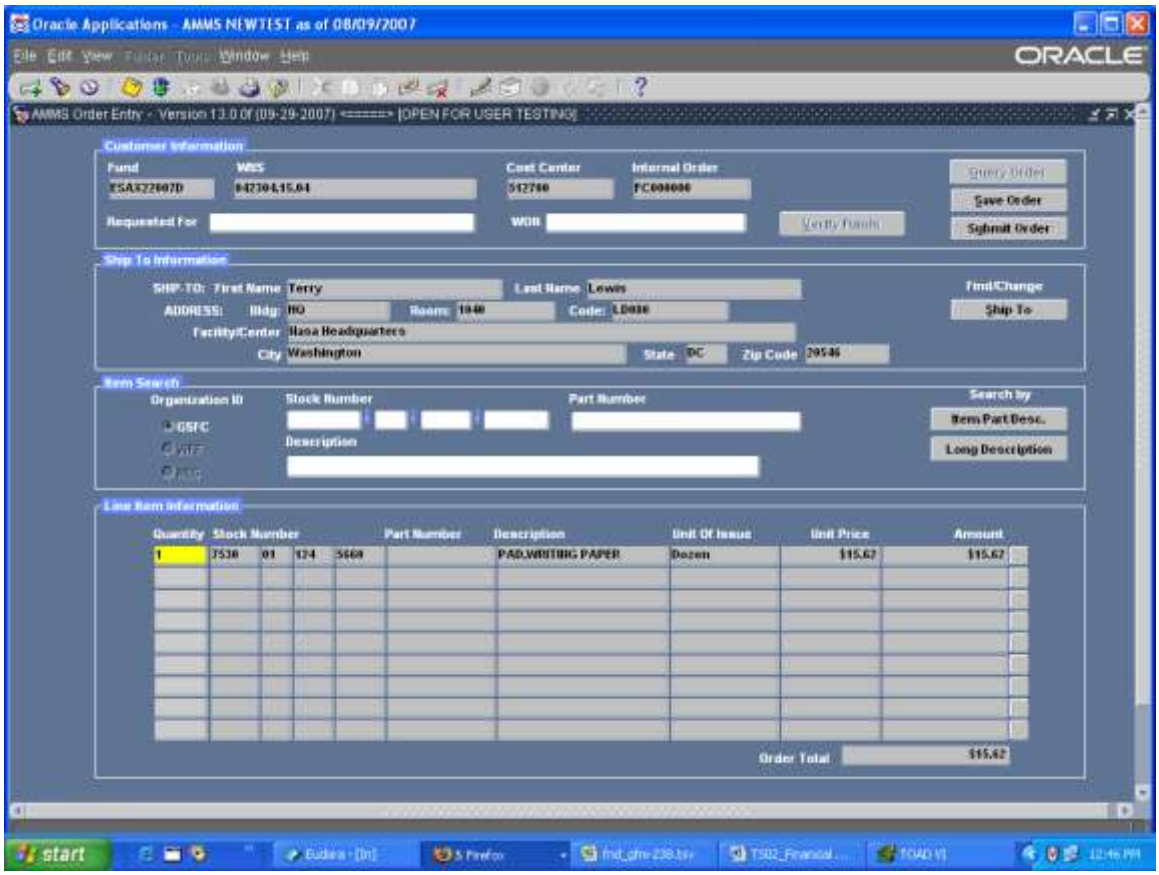


Task 5: Entering Line Item Information

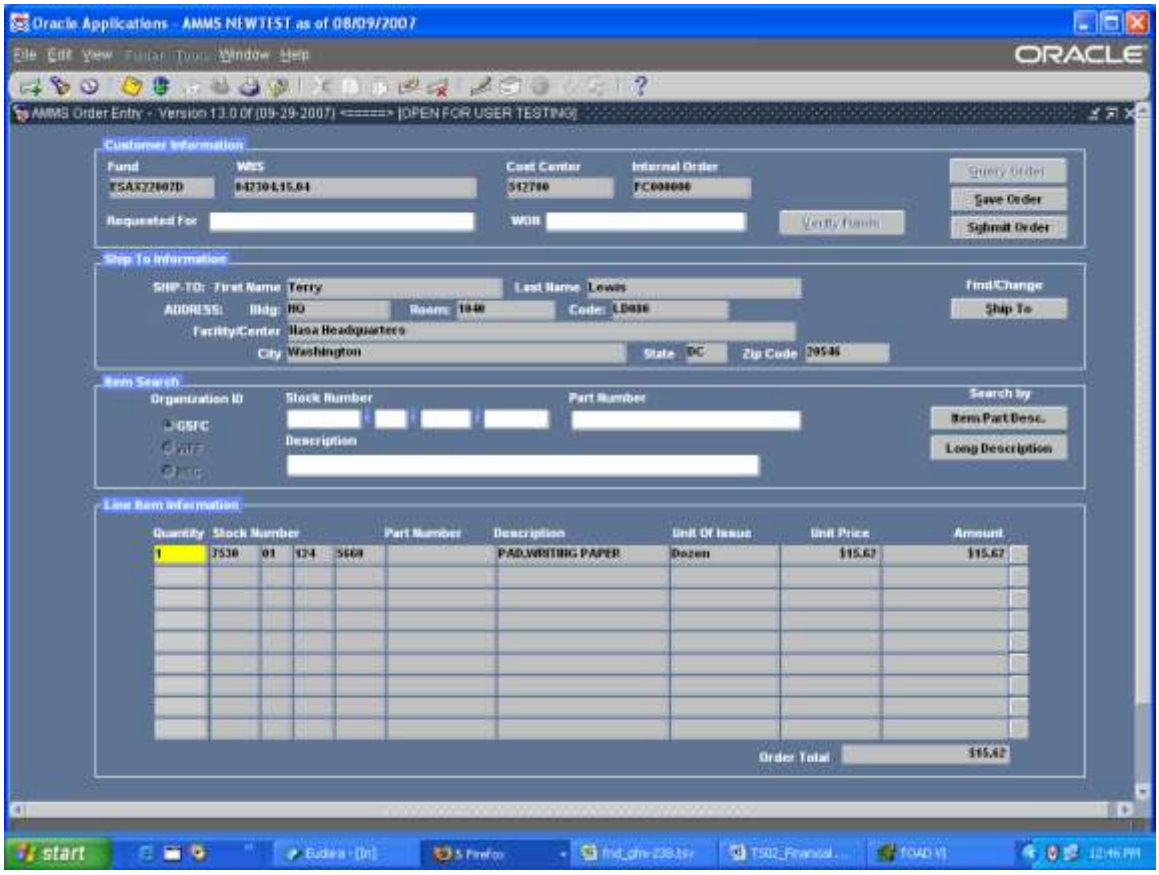
Step 5A: Updating the Line Item Quantity

By default, the quantity will of each line item ordered defaults to 1. If you want to order more than one of this item, you can you can change the quantity.

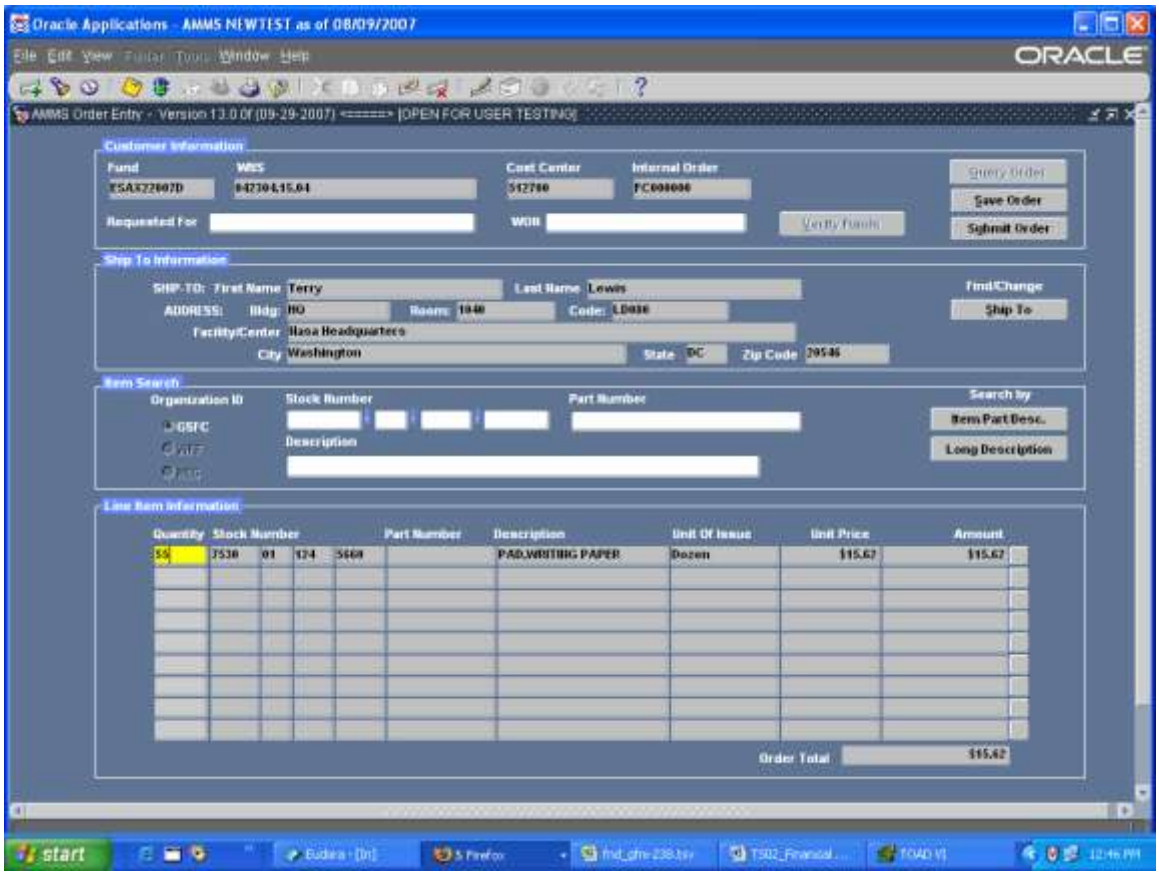
7. Click in the Quantity field for the line item.



8. It will turn yellow.



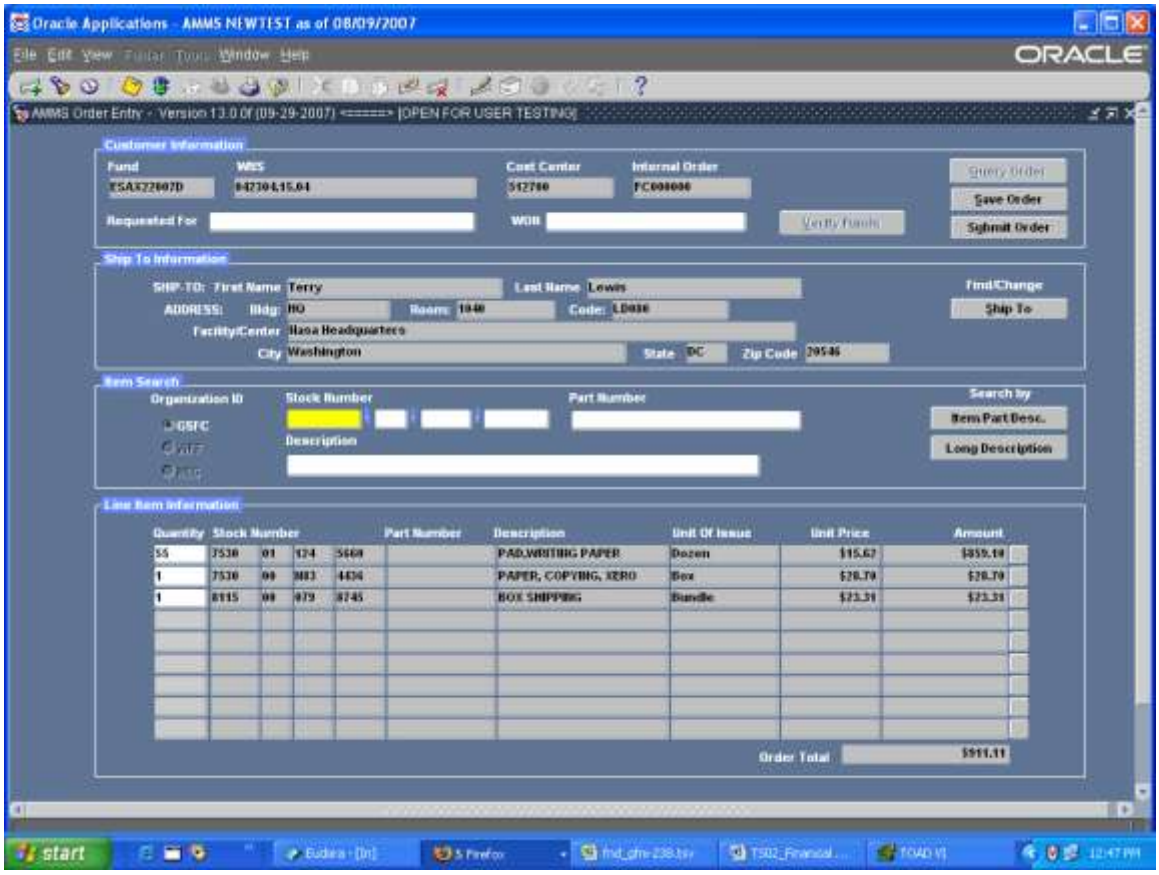
9. Update the quantity for that item and then click back in the Stock Number field to add a new line item.



Step 5B: Entering Additional Order Lines

You can add up to 99 lines to one order just repeat the steps where you enter the item number, remember to update the quantities if needed.

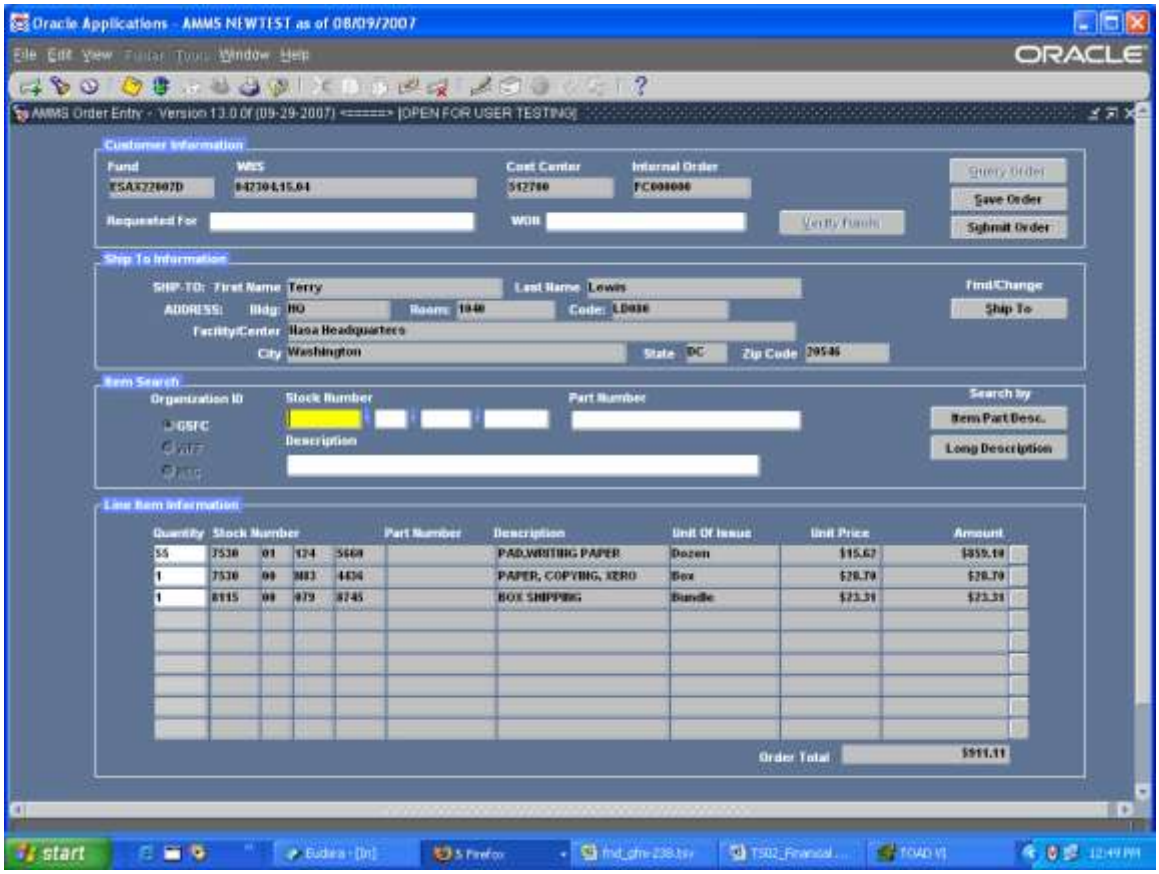
All items will be in the Line Item Information section, verify that your quantities are correct.



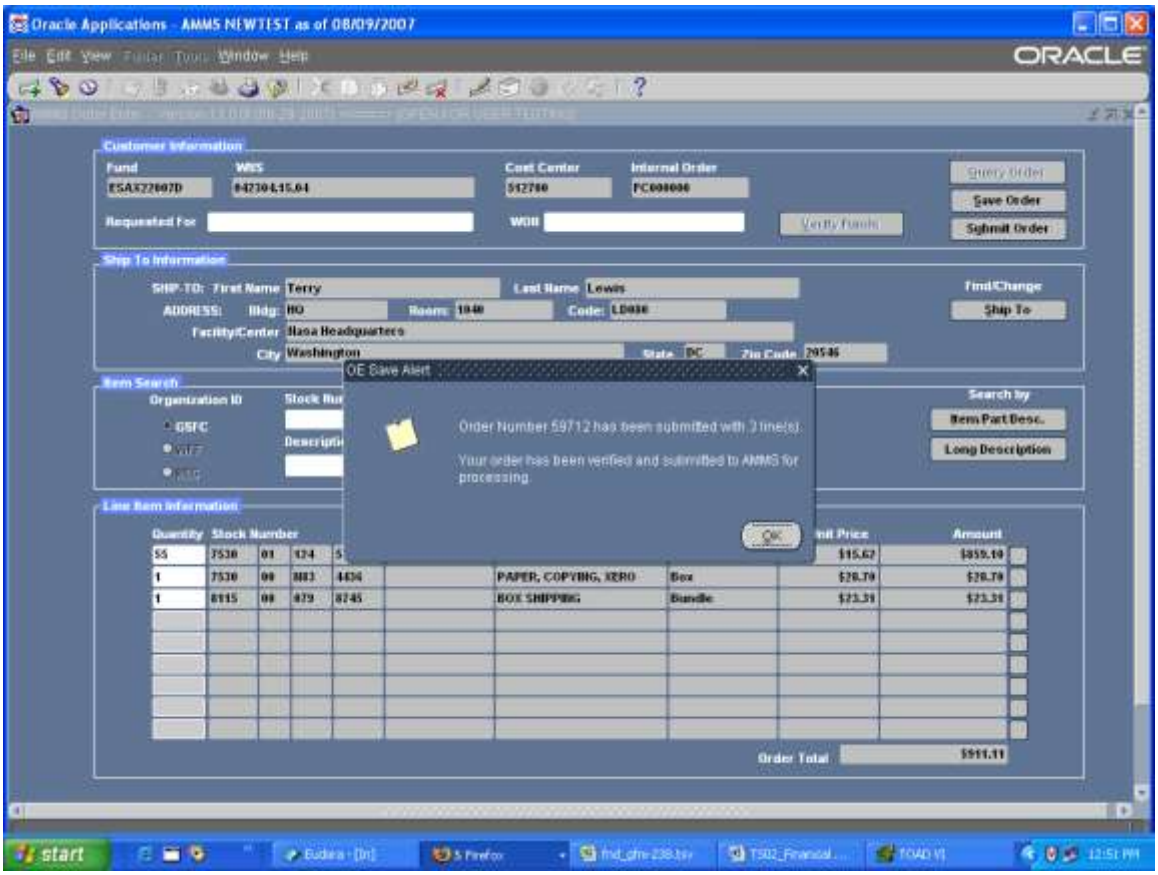
TASK 6: Submitting Your Order

Step 6A: Submitting Your Order with Sufficient Funds

7. Once you have entered all of your lines on the order click on the Submit Order button this is will be the second funds validation to make sure sufficient funds are available to cover the order. If sufficient funds are available submit your order, give you an order number and ask if you would like to print your order.



8. You will receive an OE Print Alert window, telling you your order has been submitted to AMMS, the number of line items.

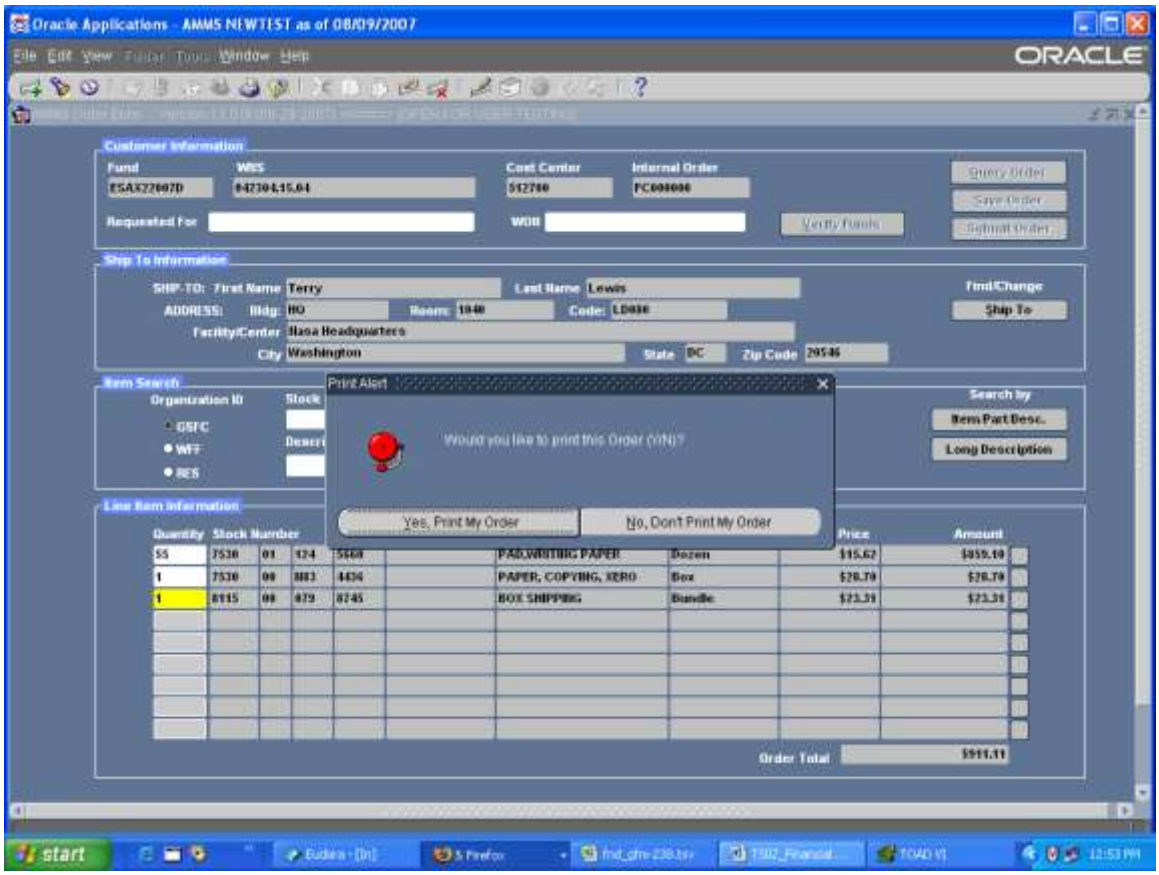


Click OK to for the print function.

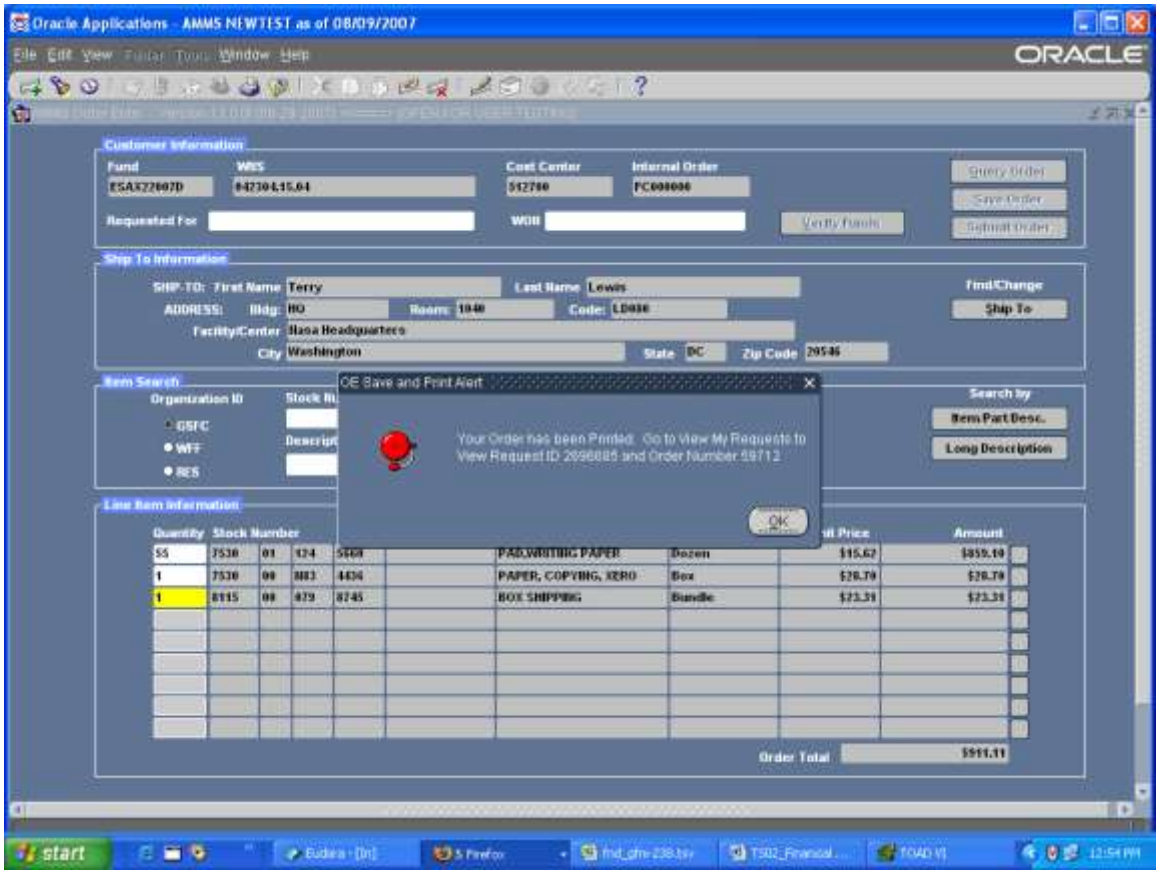
3. Printing your order:

A. If you click “Yes, Print my Order”, you will receive another OE Alert

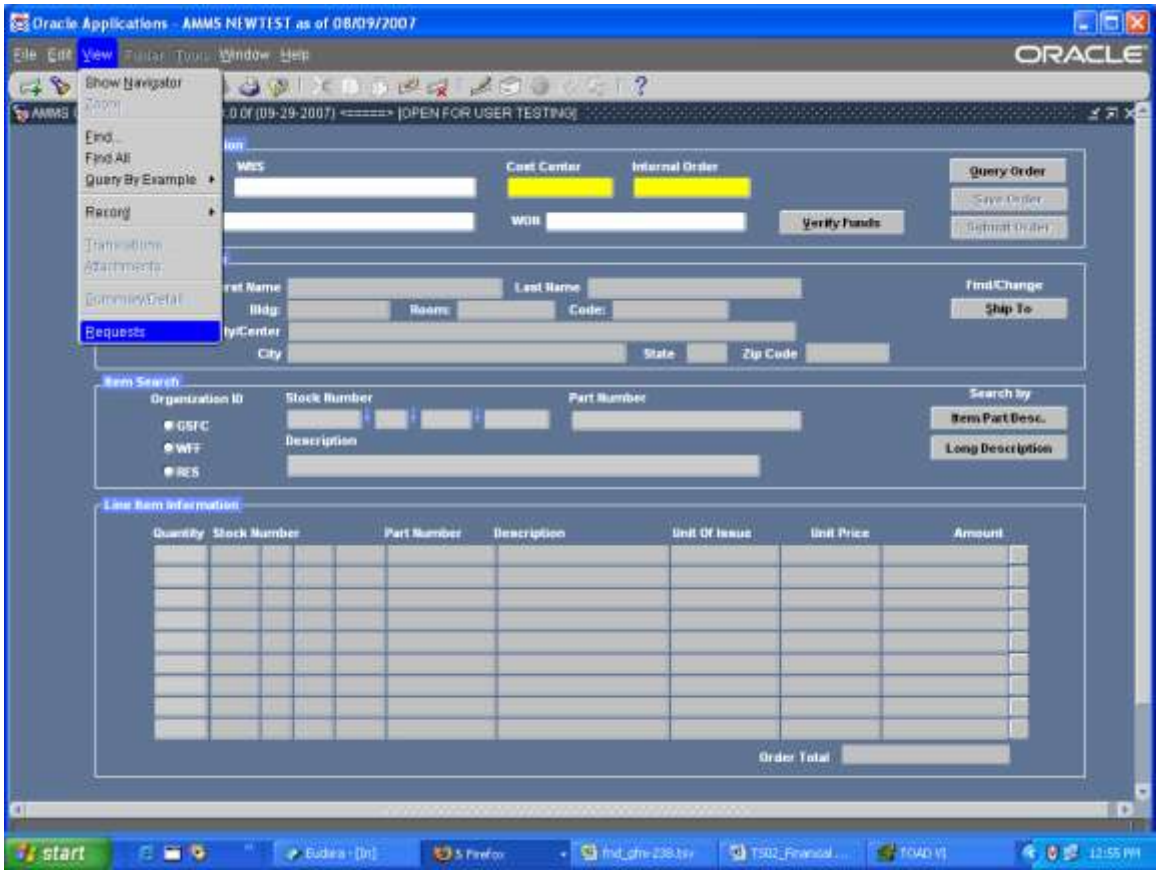
B. If you click “No, Don’t Print my Order”, you order will still be submitted for processing but not be printed. You will have to contact the AMMS Help Desk at 6-2525 to print your order.



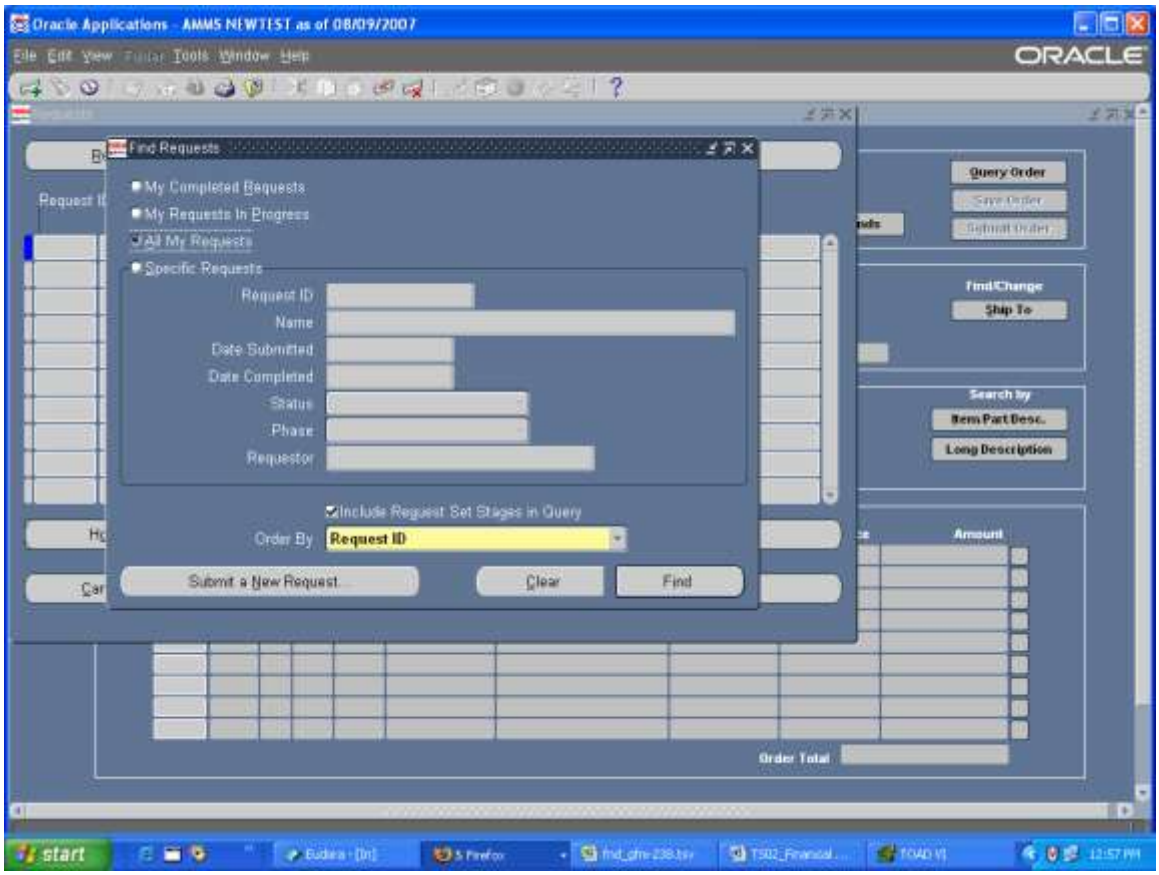
3. If you click “Yes, Print my Order” you will receive an OE Save and Print Alert, telling you your order has been printed, and to go to View Requests to view your order.



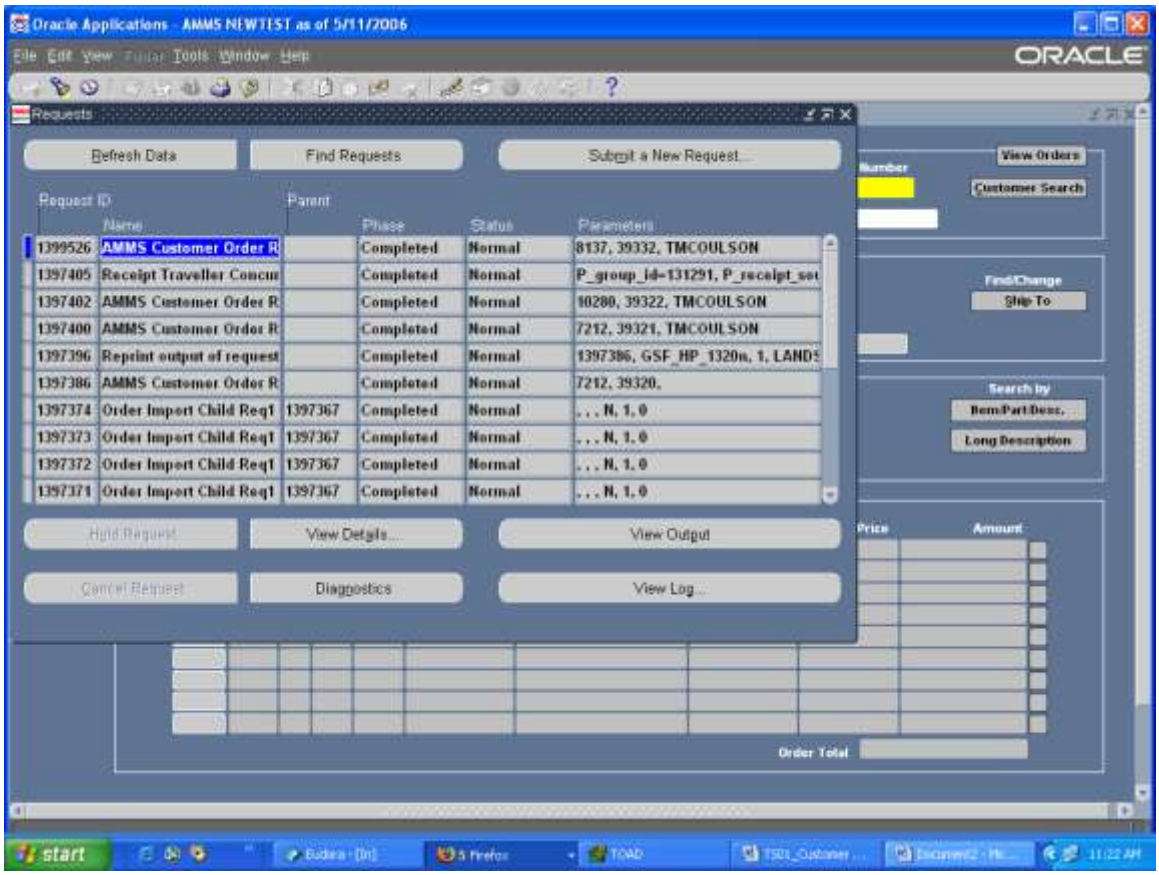
4. Click OK to the OE Save and Print Alert, your form will go blank. From the Toolbar select View, and then select Requests



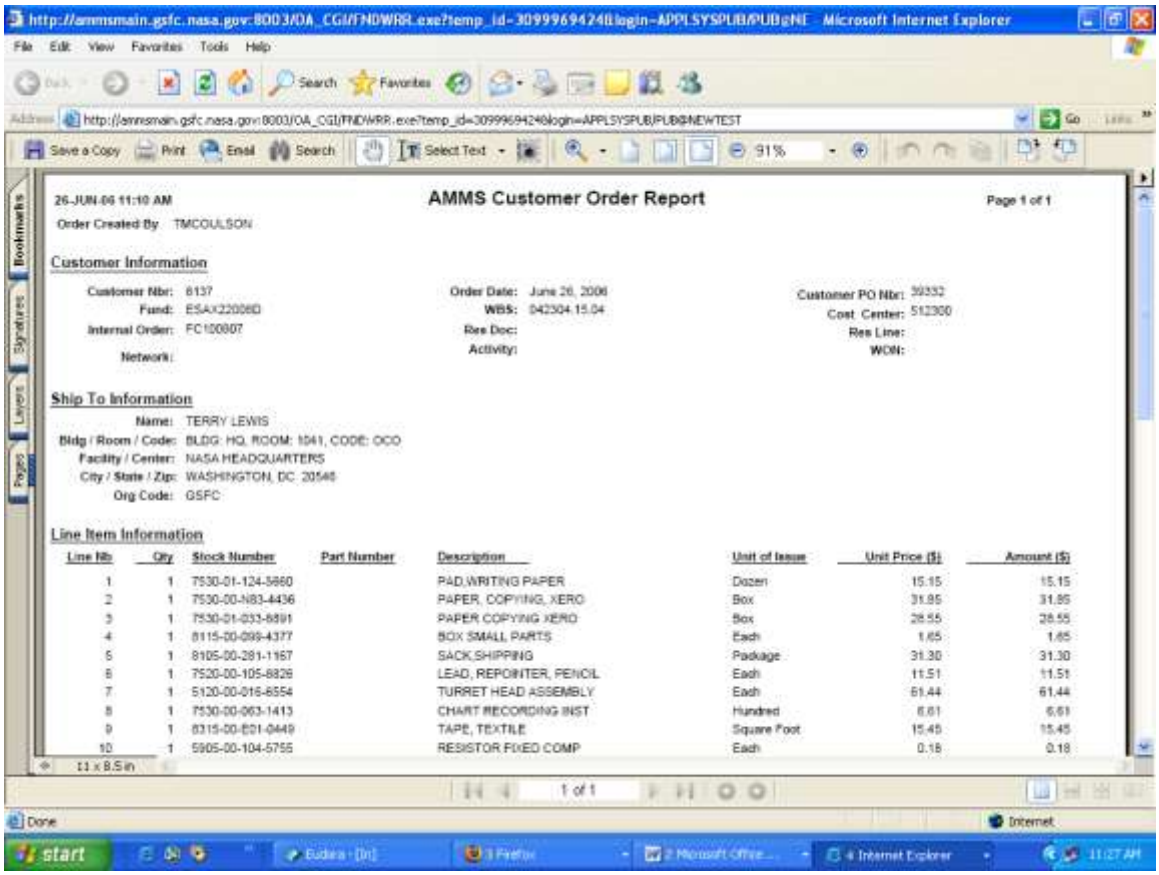
5. The Find Requests window will appear, make sure the “All my Requests” is selected, and click on the Find Button



6. You are looking for the AMMS Customer Order Report. To the right on each line, you will see your Customer Number, AMMS Number and your name. Make sure that the line indicator is on the line you want to print, if not, click on the order you want to print, click on the View Output button



7. Adobe Acrobat will open with the AMMS Customer Order Report for the selected order.



26-JUN-06 11:10 AM

Order Created By: TMCOULSON

AMMS Customer Order Report

Page 1 of 1

Customer Information

Customer Nbr: 6137
Fund: ESAX22006D
Internal Order: FC100807
Network:

Order Date: June 26, 2006
WBS: 042304.15.04
Res Doc:
Activity:

Customer PO Nbr: 39332
Cost Center: 512300
Res Line:
WON:

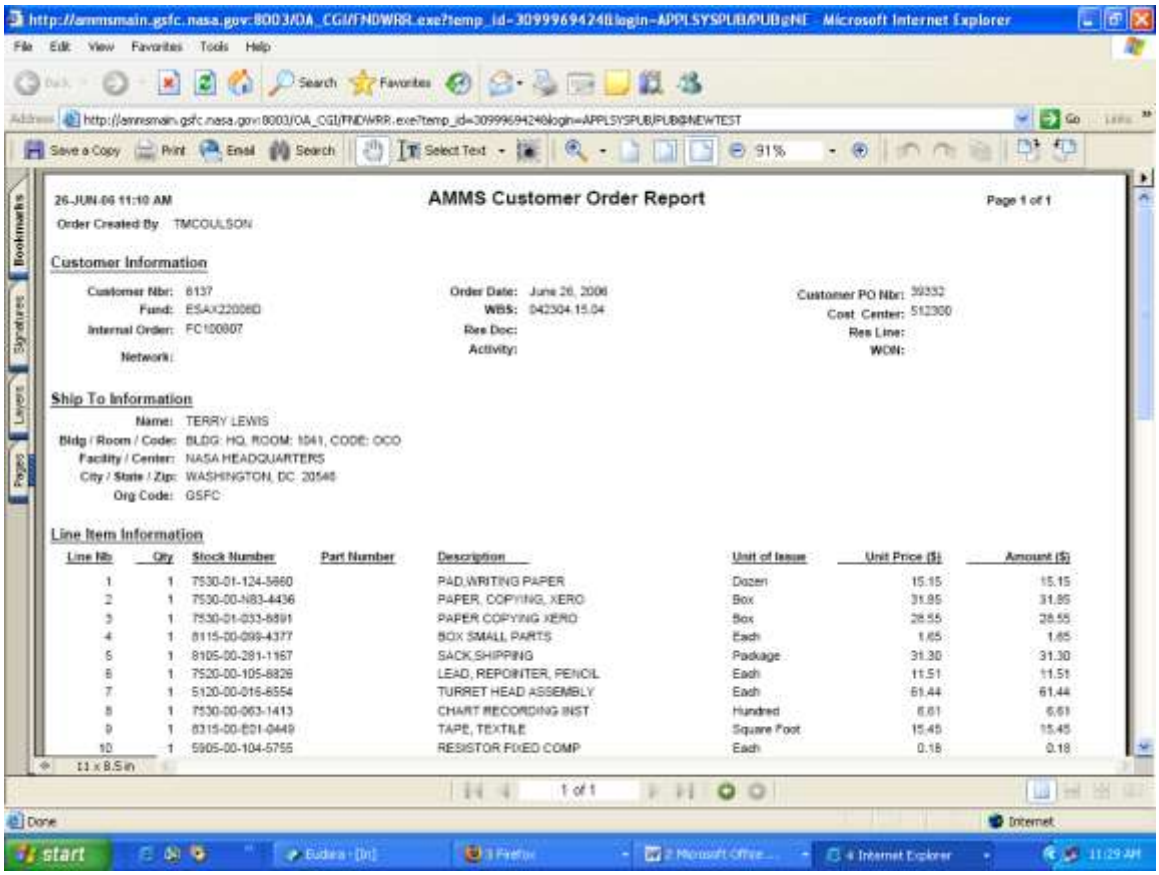
Ship To Information

Name: TERRY LEWIS
Bldg / Room / Code: BLDG: HQ, ROOM: 1041, CODE: OCO
Facility / Center: NASA HEADQUARTERS
City / State / Zip: WASHINGTON, DC 20546
Org Code: GSFC

Line Item Information

Line Nb	Qty	Stock Number	Part Number	Description	Unit of Issue	Unit Price ($)	Amount ($)
1	1	7530-01-124-5860		PAD,WRITING PAPER	Dozen	15.15	15.15
2	1	7530-00-N83-4436		PAPER, COPYING, XERO	Box	31.85	31.85
3	1	7530-01-033-8891		PAPER COPYING XERO	Box	28.55	28.55
4	1	8115-00-099-4377		BOX SMALL PARTS	Each	1.65	1.65
5	1	8105-00-281-1167		SACK,SHIPPING	Package	31.30	31.30
6	1	7520-00-105-8826		LEAD, REPOINTER, PENCIL	Each	11.51	11.51
7	1	5120-00-016-8554		TURRET HEAD ASSEMBLY	Each	61.44	61.44
8	1	7530-00-063-1413		CHART RECORDING INST	Hundred	6.61	6.61
9	1	8315-00-E01-0449		TAPE, TEXTILE	Square Foot	15.45	15.45
10	1	5905-00-104-5755		RESISTOR FIXED COMP	Each	0.18	0.18

8. From this page you can either print your order, or save it to your desktop. To print the order click on the "Print", to Save the order click "Save a Copy", and save to your documents. You can open the saved order at anytime to print it.



26-JUN-06 11:10 AM

AMMS Customer Order Report

Page 1 of 1

Order Created By: TMCOULSON

Customer Information

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Internal Order: FC100807
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Customer PO Nbr: 39332
Cost Center: 512300
Res Line:
WON:

Ship To Information

Name: TERRY LEWIS
Bldg / Room / Code: BLDG: HQ, ROOM: 1041, CODE: OCO
Facility / Center: NASA HEADQUARTERS
City / State / Zip: WASHINGTON, DC 20546
Org Code: GSFC

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Line Nb	Qty	Stock Number	Part Number	Description	Unit of Issue	Unit Price ($)	Amount ($)
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7	1	5120-00-016-6554		TURRET HEAD ASSEMBLY	Each	61.44	61.44
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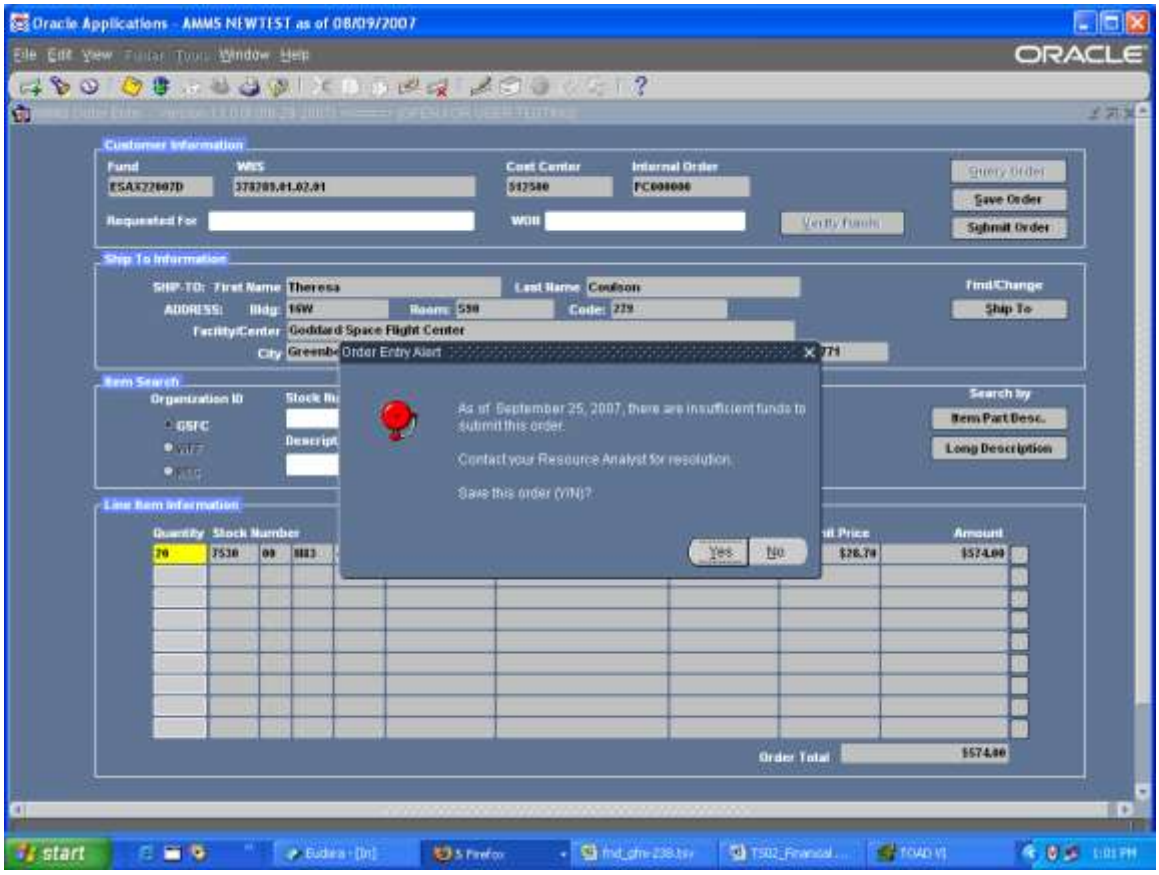
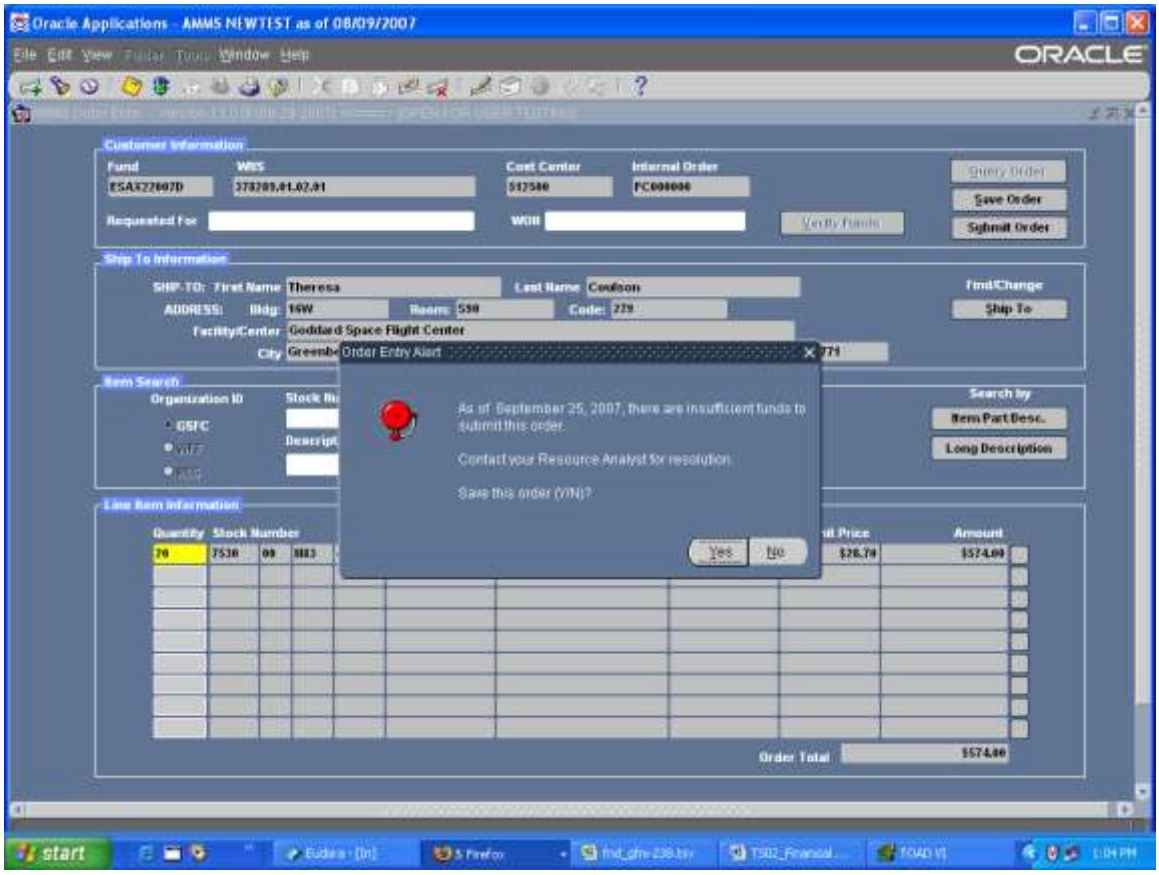
9	1	8315-00-621-0449		TAPE, TEXTILE	Square Foot	15.45	15.45
10	1	5905-00-104-5755		RESISTOR FIXED COMP	Each	0.18	0.18

Step 6B: Submitting Your Order with insufficient funds

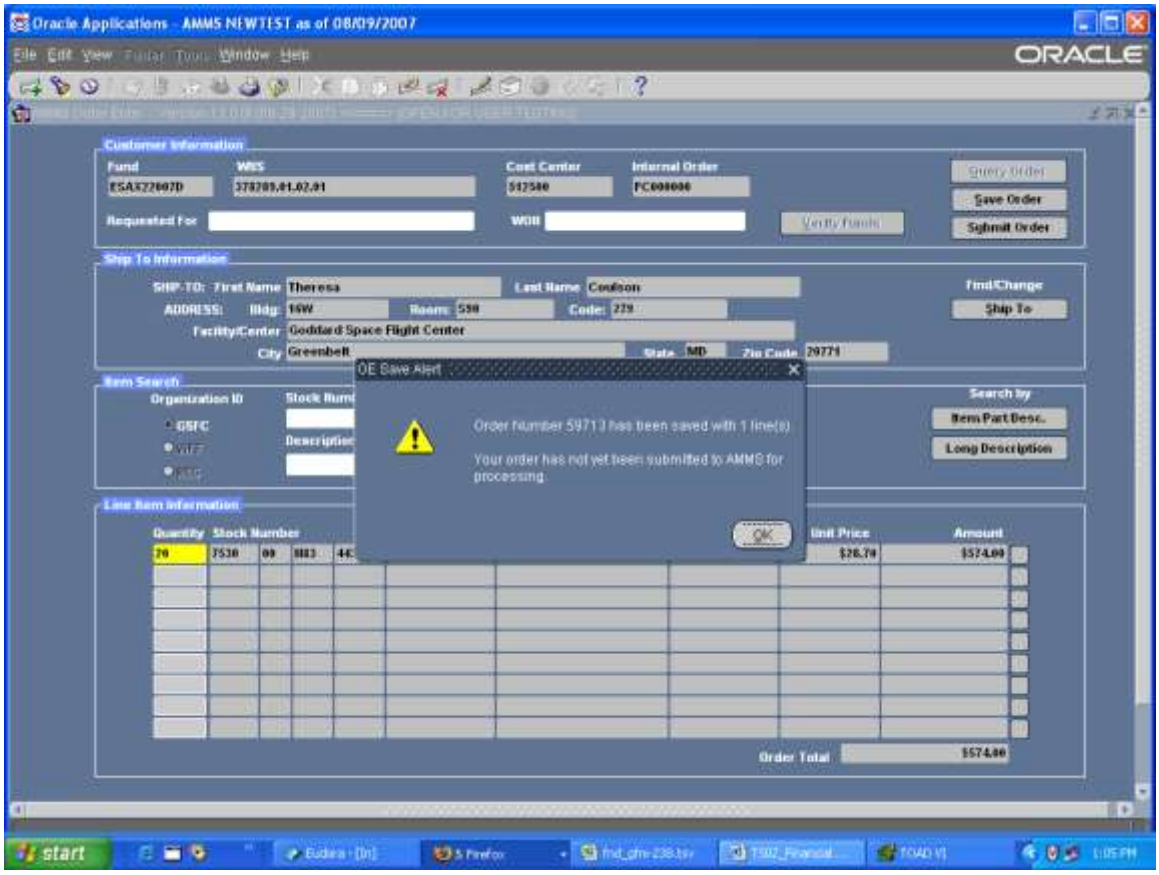
1. If after you have entered all of your items you want to order and you click on Submit button and you receive this message:



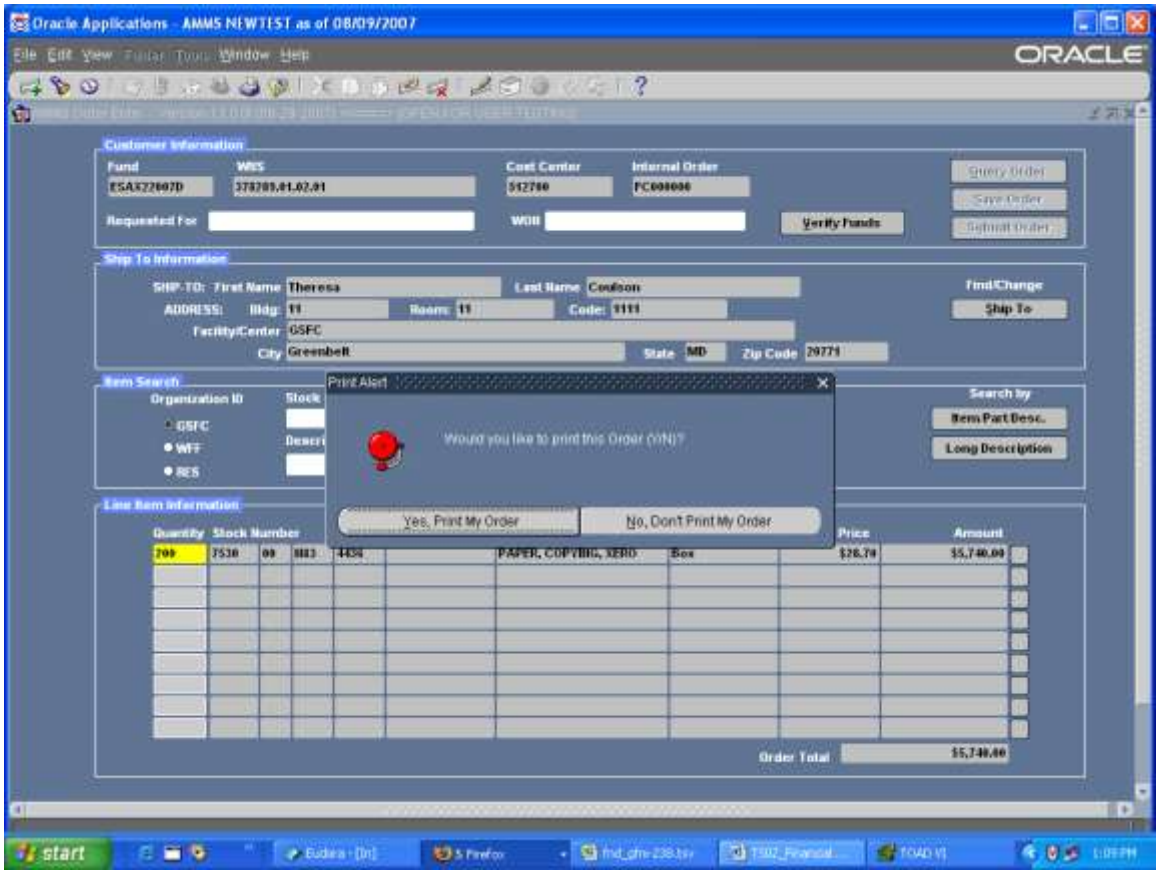
There is not enough money in the Inventory Pool to cover your order. You need to contact your Resource Analyst. You now have the ability to Save your order to refer back to once the funds transfer has been completed. Click Yes to the "Save this Order?"



2. Your order is now saved and can be queried at a later date. You will need to know your AMMS Order Number to query your saved orders.



3. You also have the ability to print your saved orders:

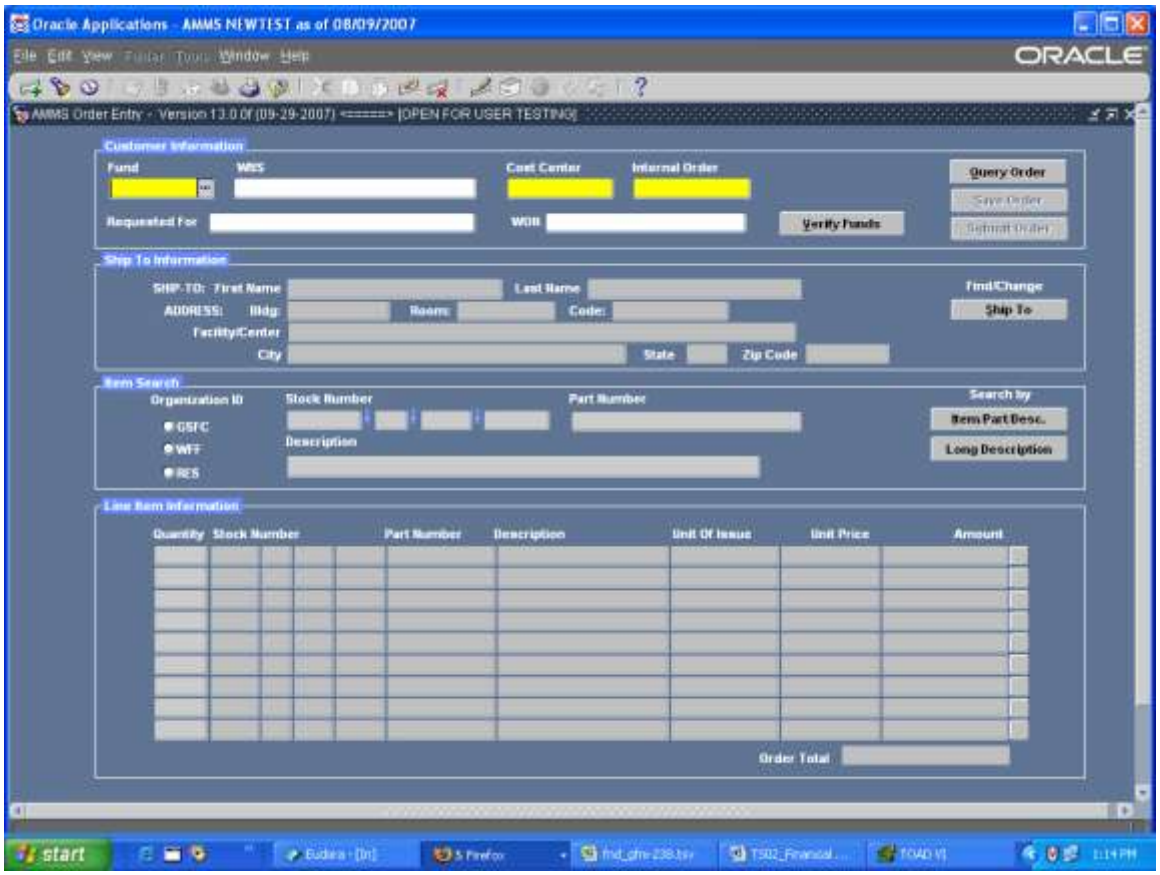


Follow the printing instructions from above.

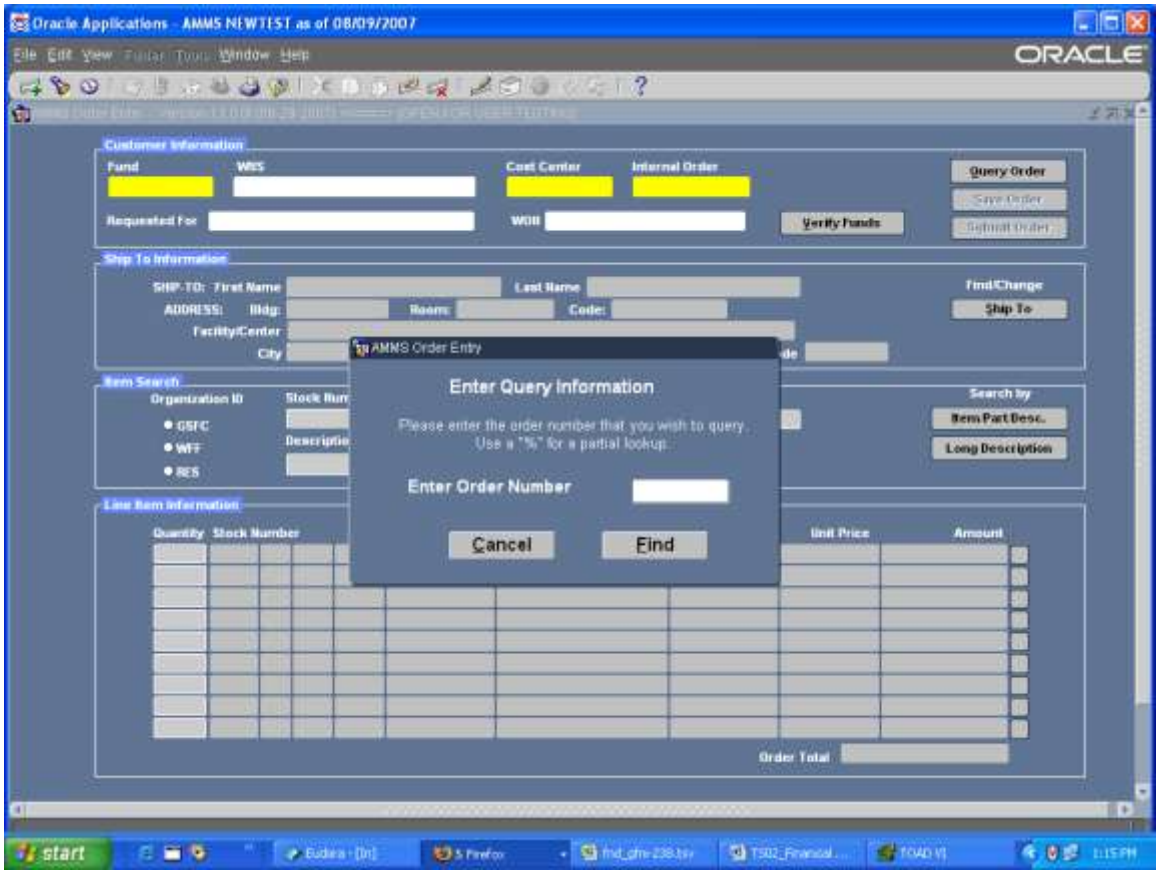
Task 7: Query a Saved Order

Once your Resource Analyst resolves the funds issue you can query your saved order and submit it.

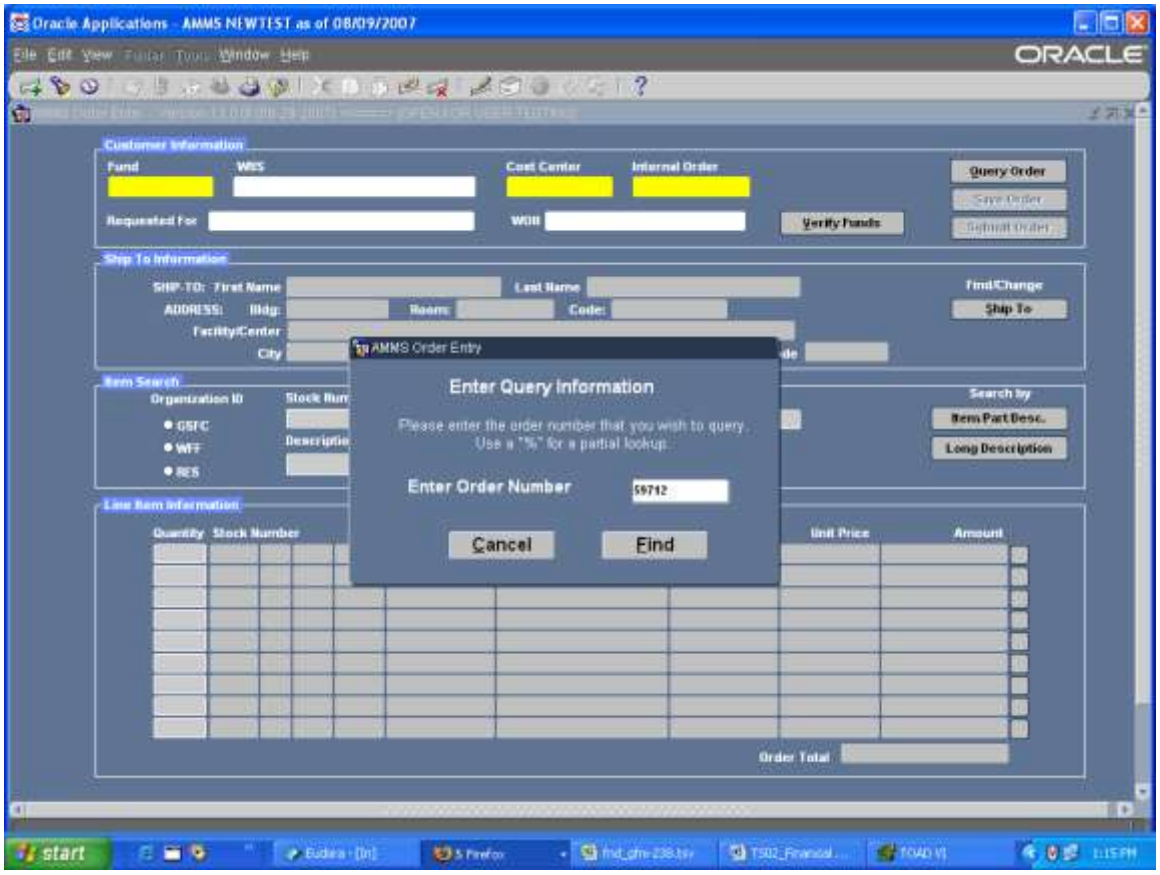
1. Open AMMS and click on the Query Order button:



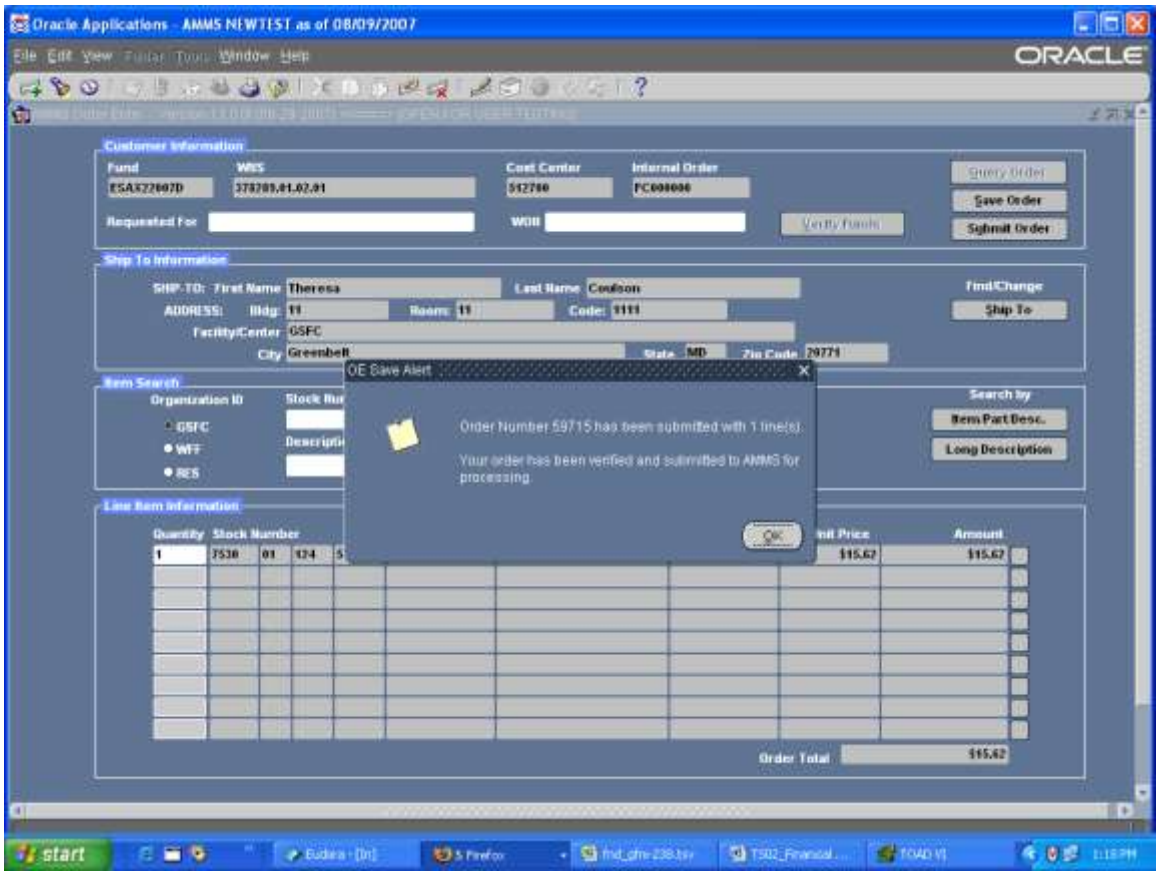
2. In the Enter Order Number field enter the number of the order that was saved:



3. Click on Find:



Your original order will appear. At this time if sufficient funds are available click on the Submit Order button, you will receive your Order Number and be able to print your order:



AMMS TRAINING SCRIPT

How HQ Users Use AMMS
To Place Store Stock Orders

Purpose

The purpose of this training script is to explain how HQ Users are to place orders in AMMS

Audience

HQ Users of AMMS

Prepared By	Rob Amos, Theresa Coulson
Creation Date:	08/4/2008
Document Name	AMMS HQ Order Entry.doc
Version	3
Last Updated:	10/21/2010
The most current version of this training script can be found at GSFC-FileSRVC\270Public\279 IT\Training\AMMS Customer Training Docs\Published\AMMS HQ Order Enter Training\.	

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Task 1: Accessing the HQ AMMS Order Entry System

This section will describe how to access the Advanced Material Management System (AMMS) Oracle system and log in using your AMMS userid and password. If you are not currently enrolled as an AMMS user, you must contact the AMMS Help Desk at 301-286-2525 or send an e-mail to Tabatha Luskey at Tabatha.L.Luskey@nasa.gov.

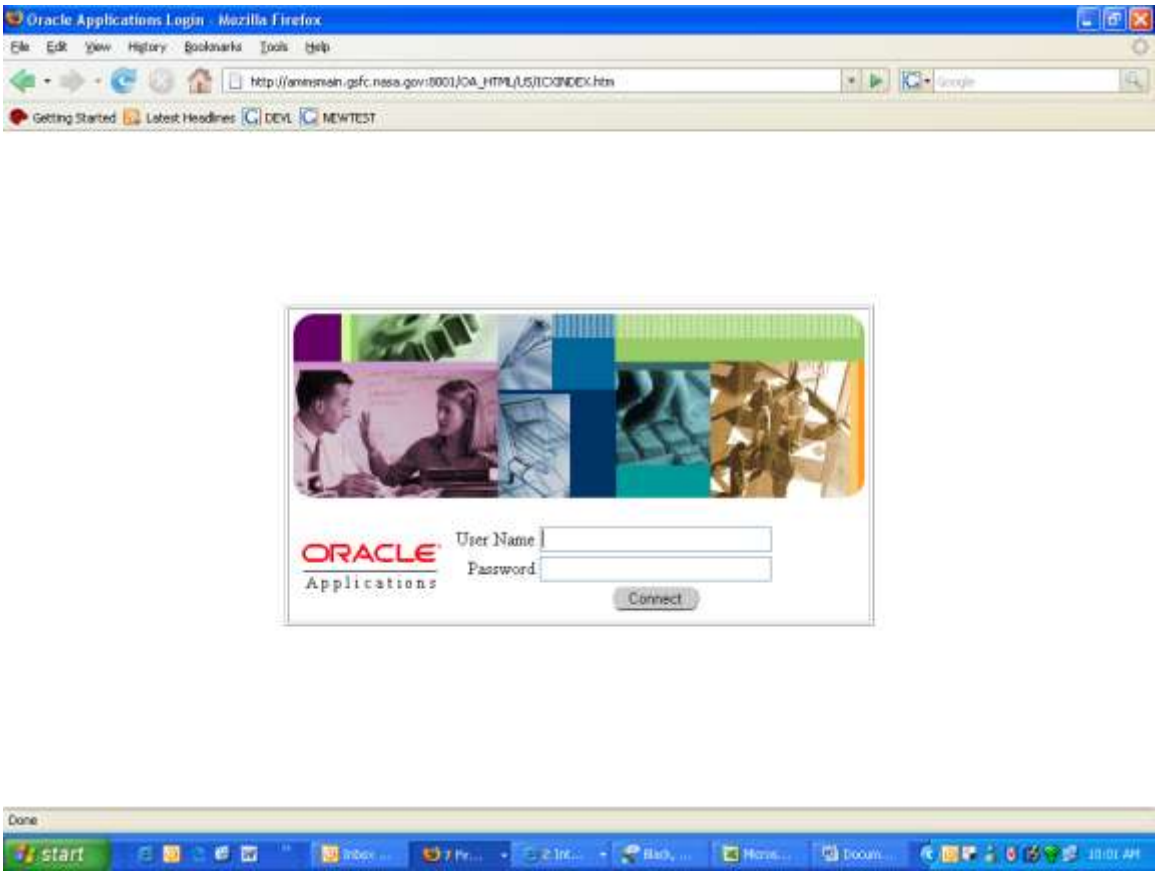
More information on the AMMS System is available on the AMMS web site http://amms.gsfc.nasa.gov

Step 1A: Access the AMMS System Web Site

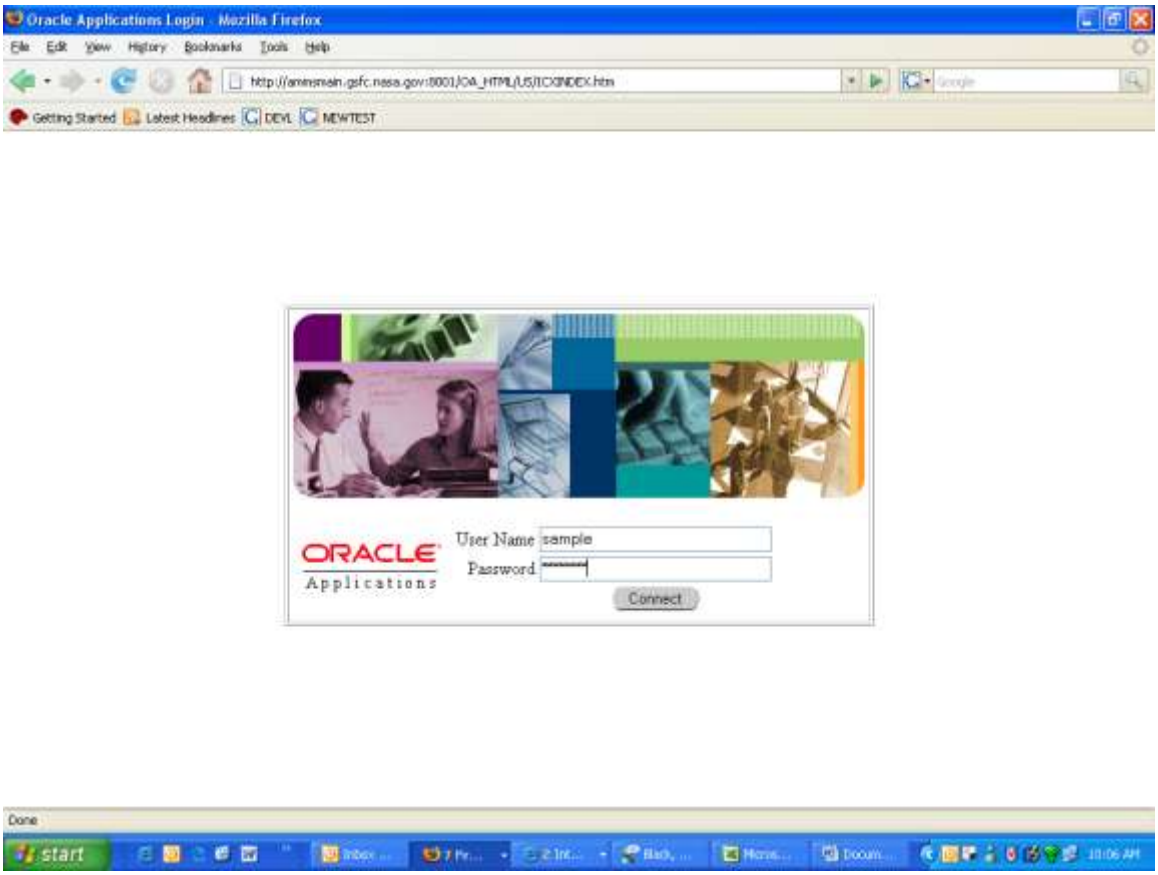
1. From your web browser, enter the following URL to access the AMMS system:

   http://amms.gsfc.nasa.gov

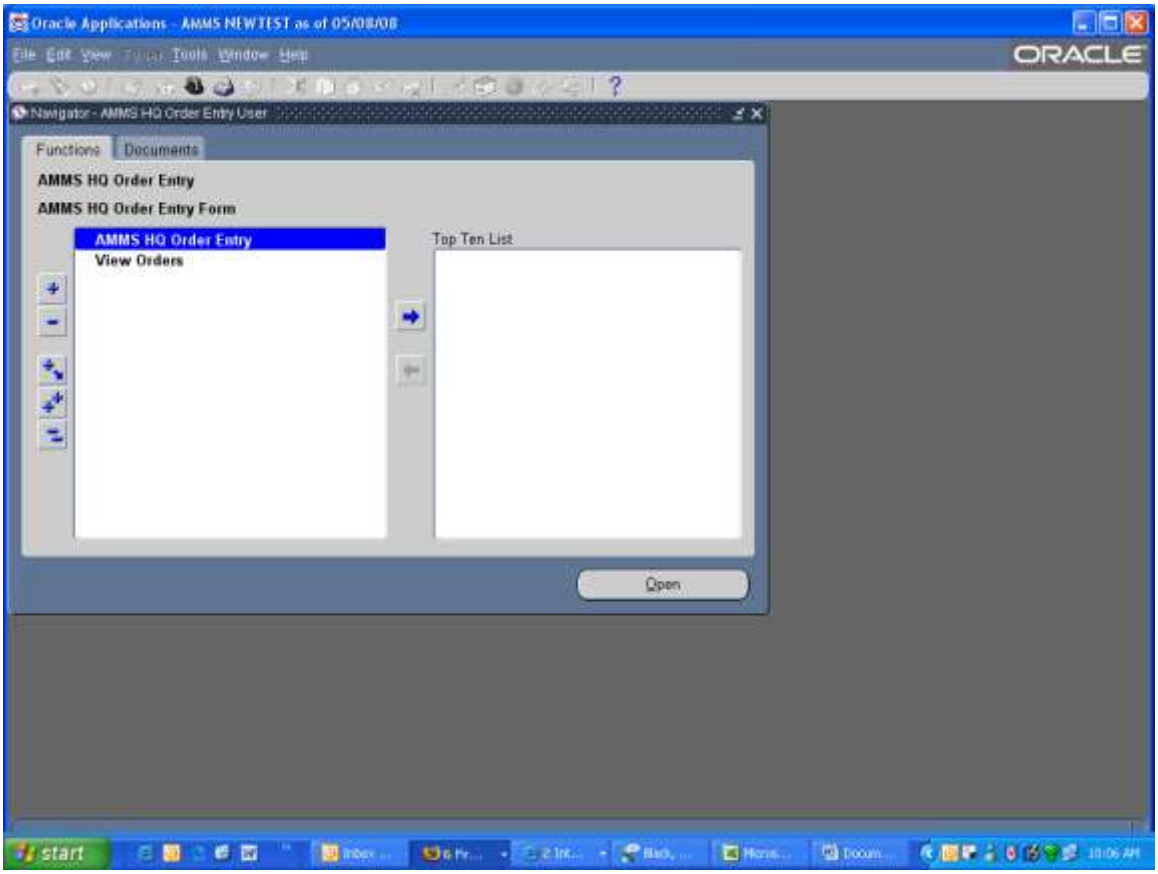
The following screen should appear:



2. Enter your AMMS userid and password in the fields on the screen and then click the **Connect** button. Note, your password will not display in text but will display as asterisks (*).



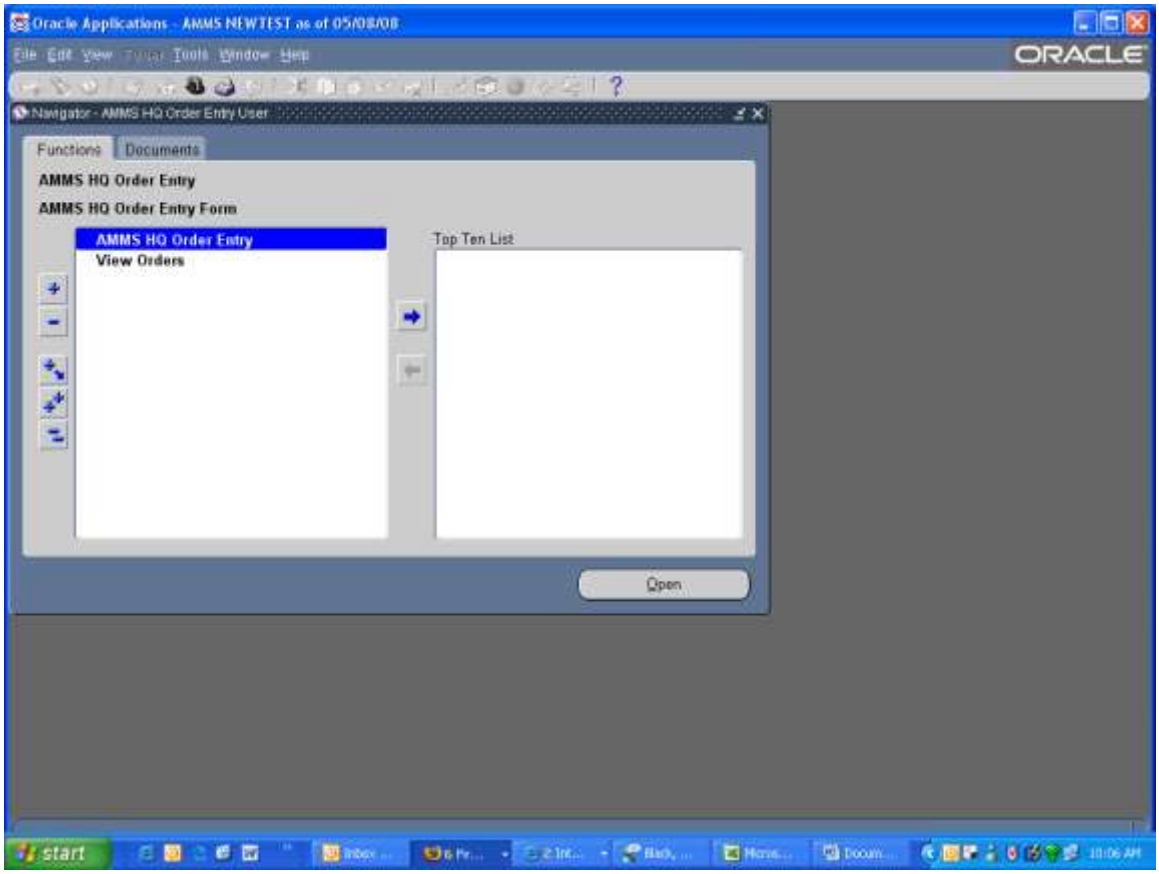
3. The **AMMS HQ Order Entry Form** function menu will appear:



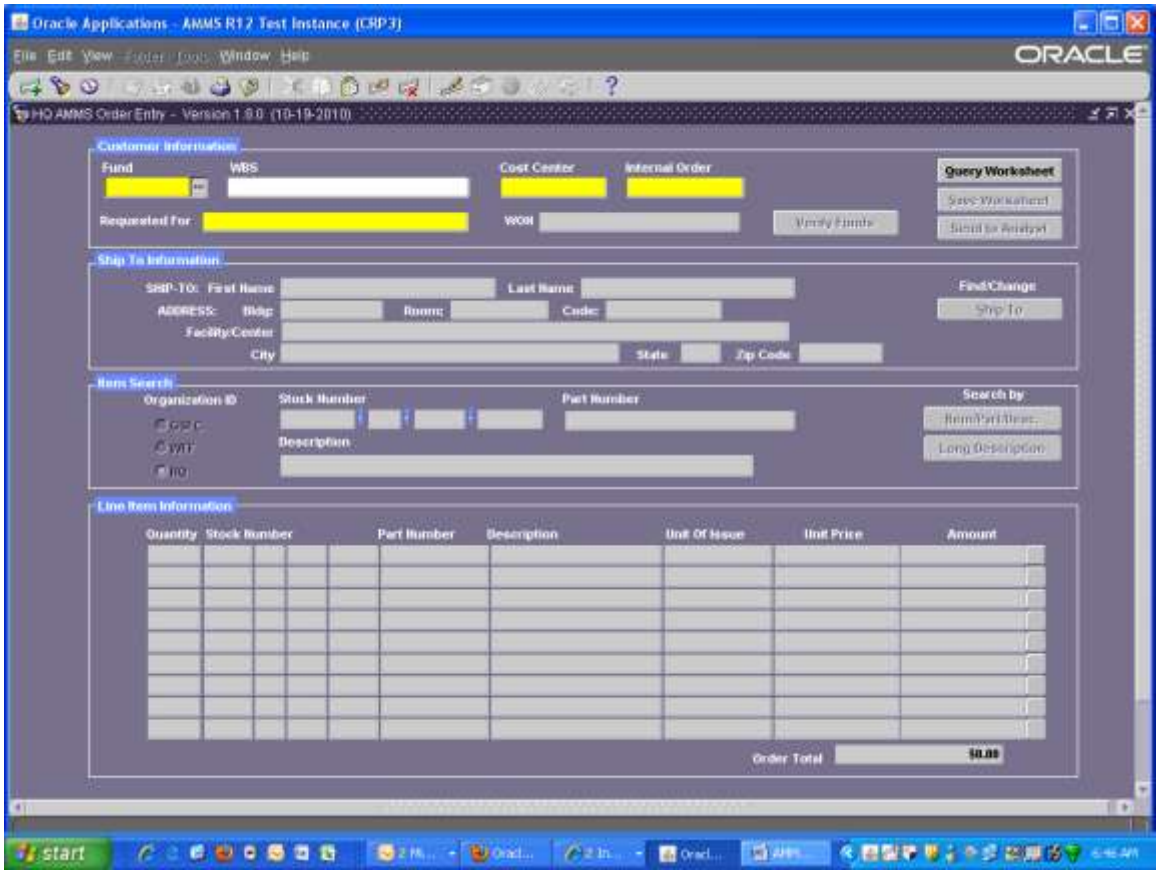
Step 1B: Navigating to the AMMS HQ Order Entry Screen

Once you have successfully accessed the AMMS HQ system and the list of available functions are displayed, you are ready to navigate to the **AMMS HQ Order Entry** screen.

1. The **AMMS HQ Order Entry Form** function menu should appear:



2. Click on **AMMS HQ Order Entry** to highlight it and then press the **Open** to go to the **AMMS HQ Order Entry** screen. The following screen should appear:



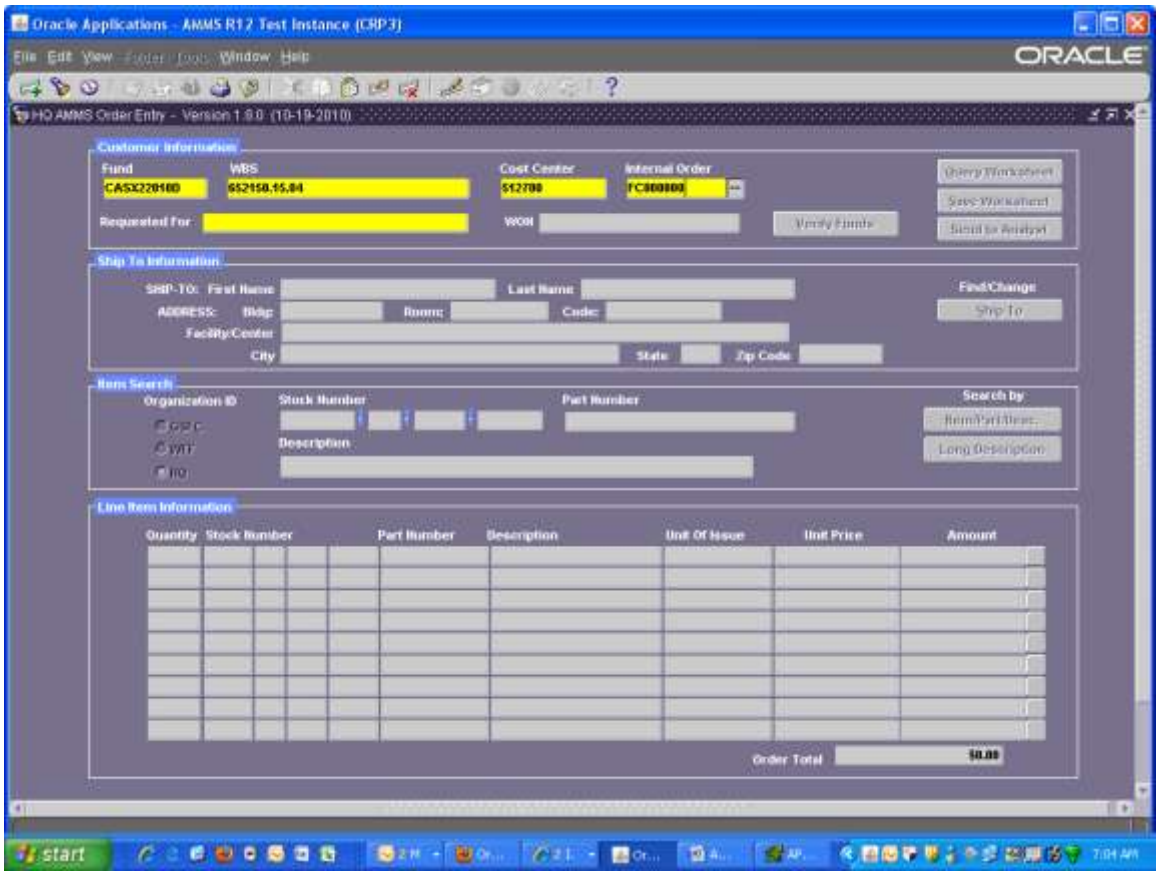
3. You are now ready to begin placing order in the **AMMS HQ Order Entry** form.

Task 2: Entering AMMS HQ Orders Using Your Financial String

All NASA HQ orders must now be entered into the system using your SAP Financial String. The SAP financial string consists of the SAP Fund, WBS, Cost Center, and Internal Order numbers assigned to your organization. Each year, aspects of the financial string will change and you will be notified of the new financial string.

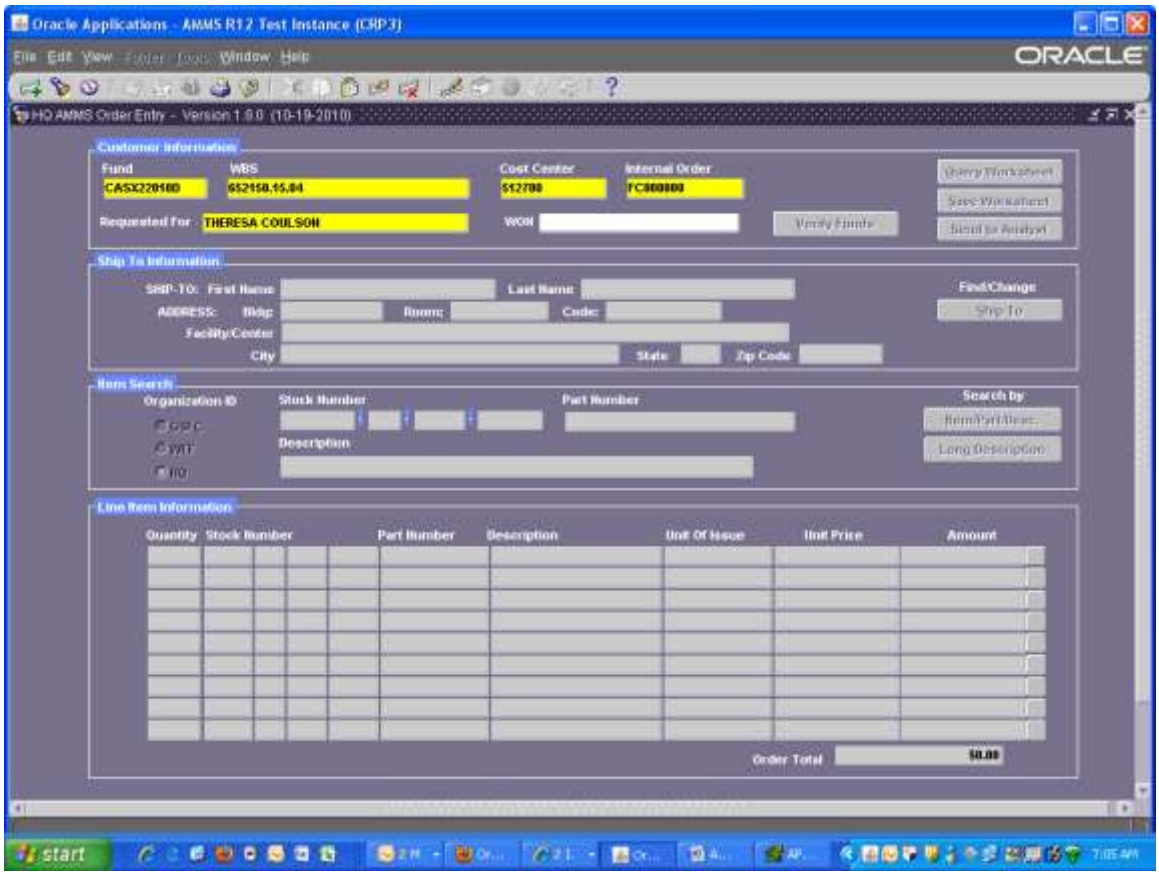
Step 2A: Entering the Financial Information

Each year, you will be given the financial information [Fund, WBS, Cost Center and Internal Order] to use for HQ AMMS orders. You will enter these numbers directly in the AMMS HQ Order Entry form:



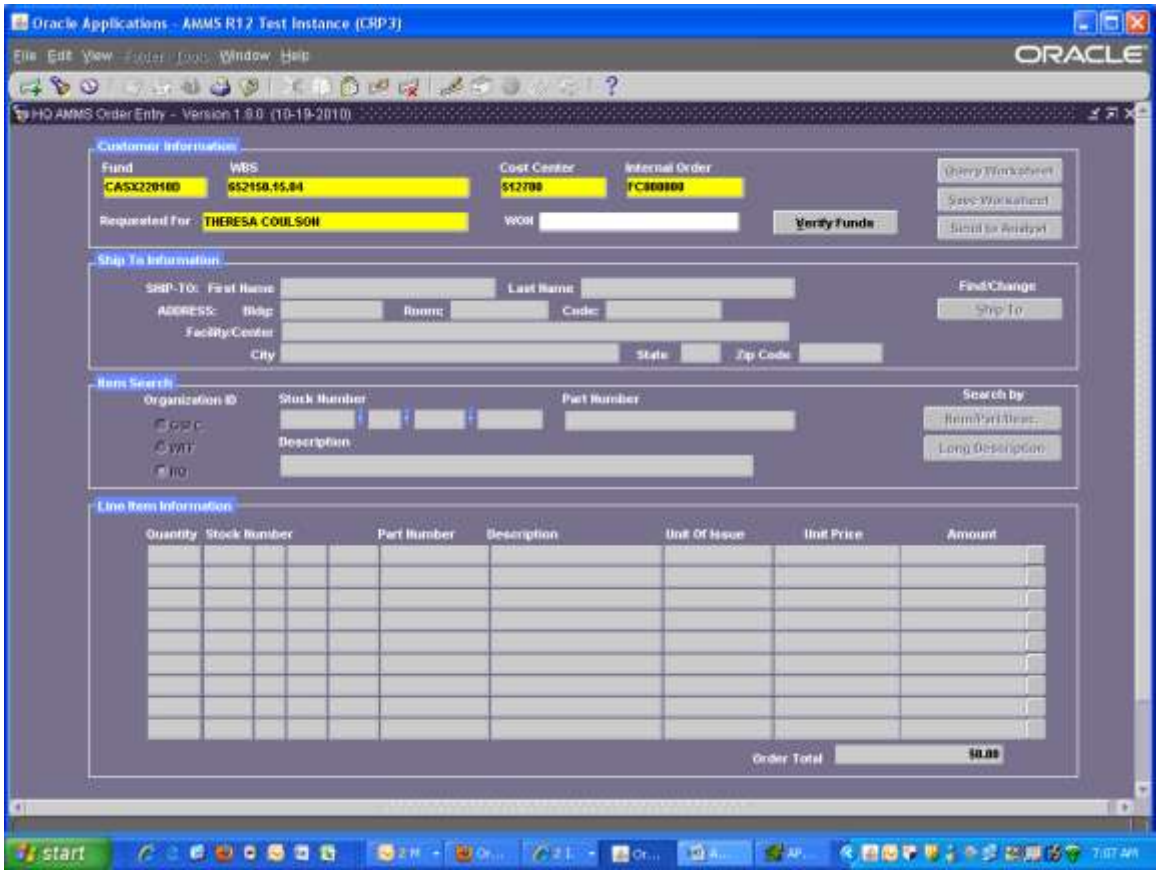
Step 2B: Entering Requested For information

You are required to enter information in the **Requested For** field. This is a free-form field that you should use to document who this order is for or any other pertinent information you want to remember about the order.



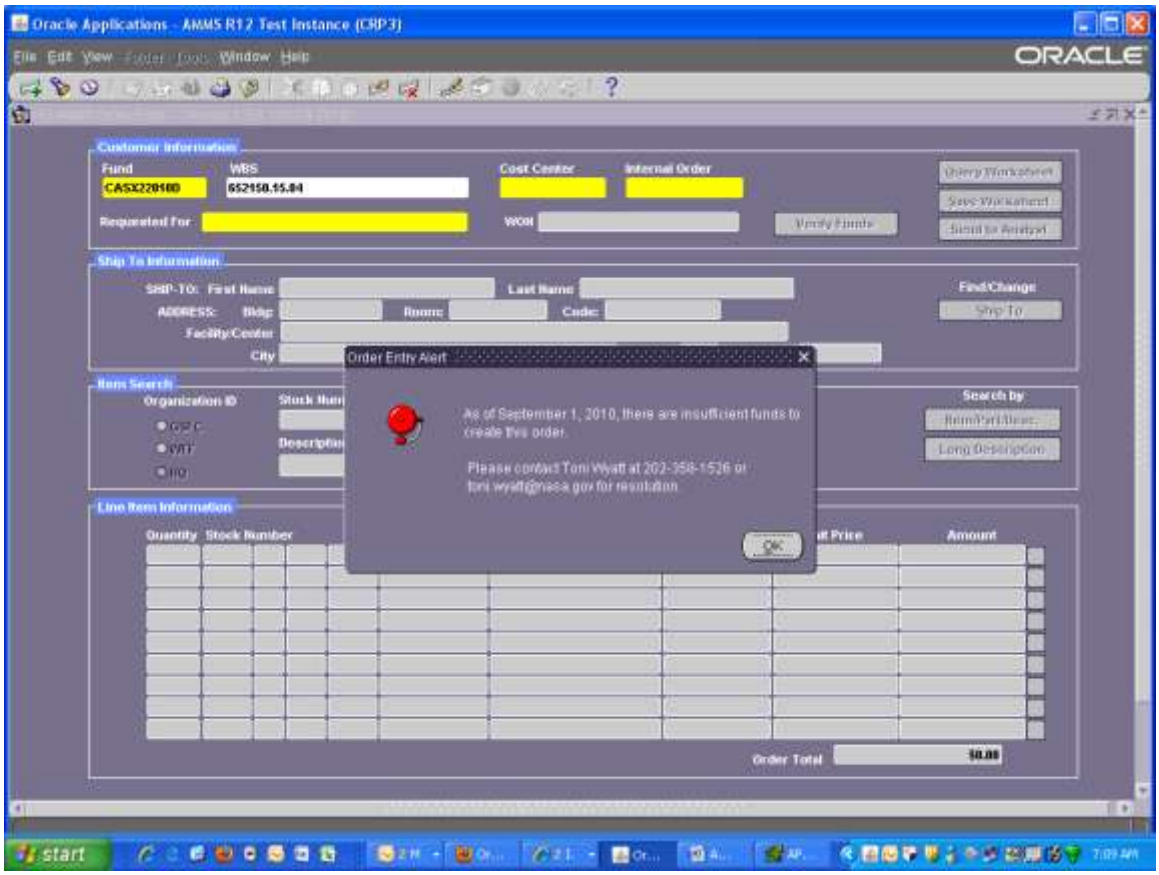
Step 2C: Verifying the Financial Information

After you enter the data in the **Requested For** field, press the **Tab** key on your keyboard to move the cursor to the **Verify Funds** button (which will then become active). Click on the **Verify Funds** button to validate that you have entered the correct financial information for HQ, if there are funds available you can proceed with your order



Step 2D: If there are insufficient funds

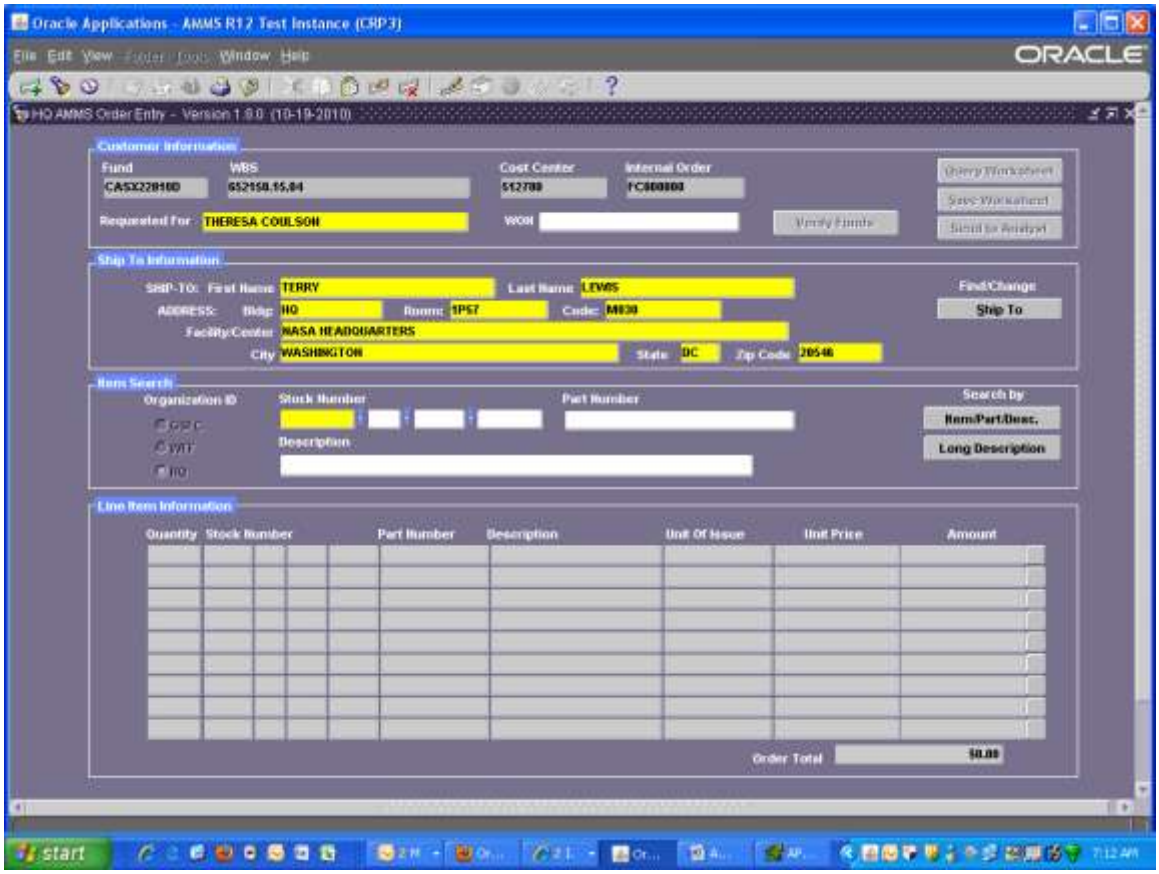
If there are no funds available for the HQ financial information you will see this message. Please contact the person indicated for assistance.



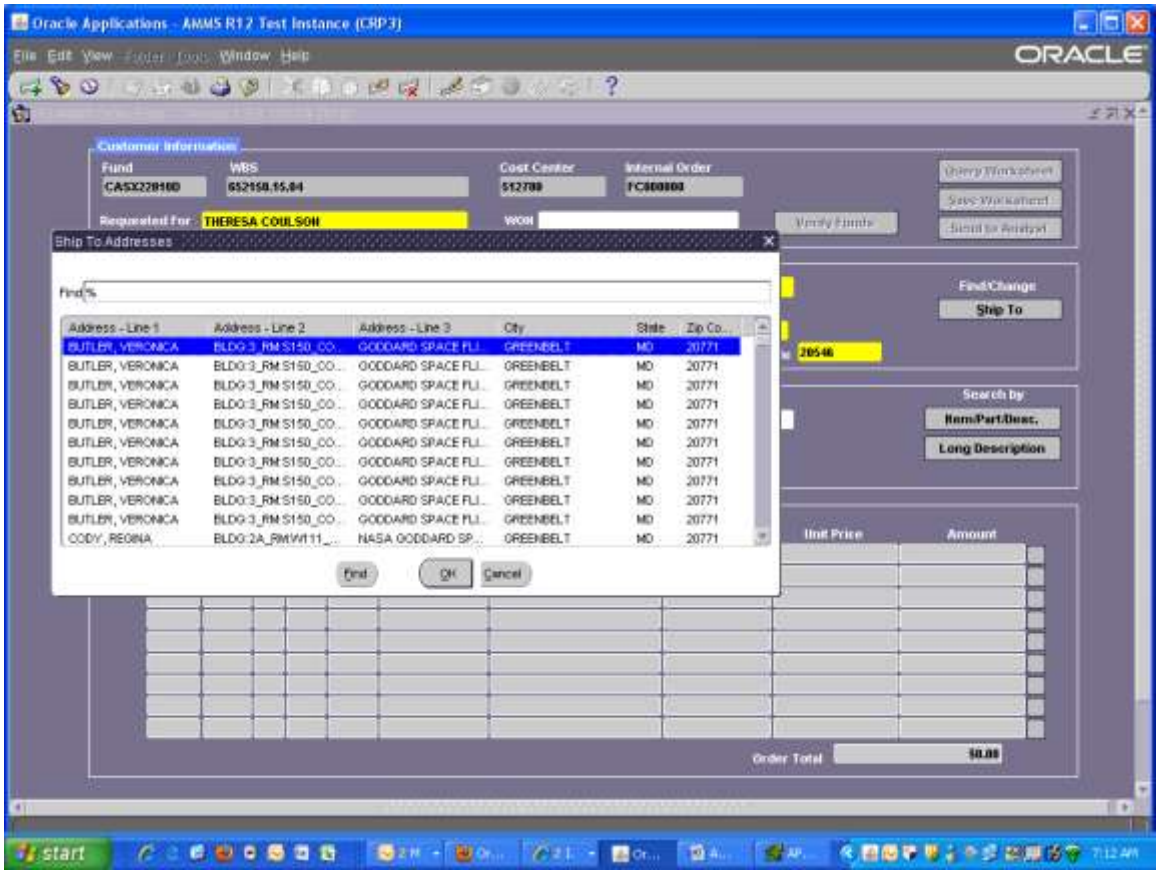
Step 2E: Entering the Shipping Information

Once the **Financial Information and it** has been verified that there are funds available, the **Ship To Information** block will be populated with the default shipping address for this customer number. You must change this address to have the material shipped to the correct location.

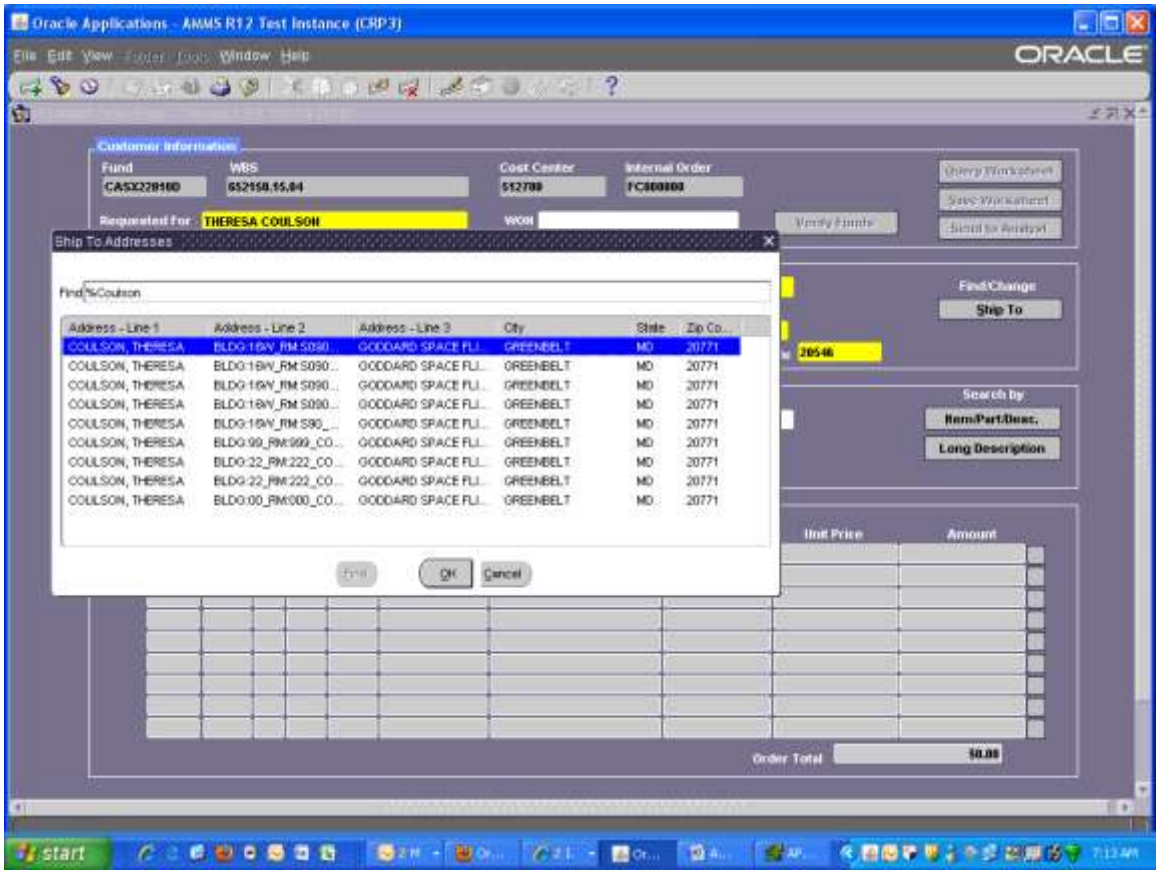
To do this click on the **Ship To** button:



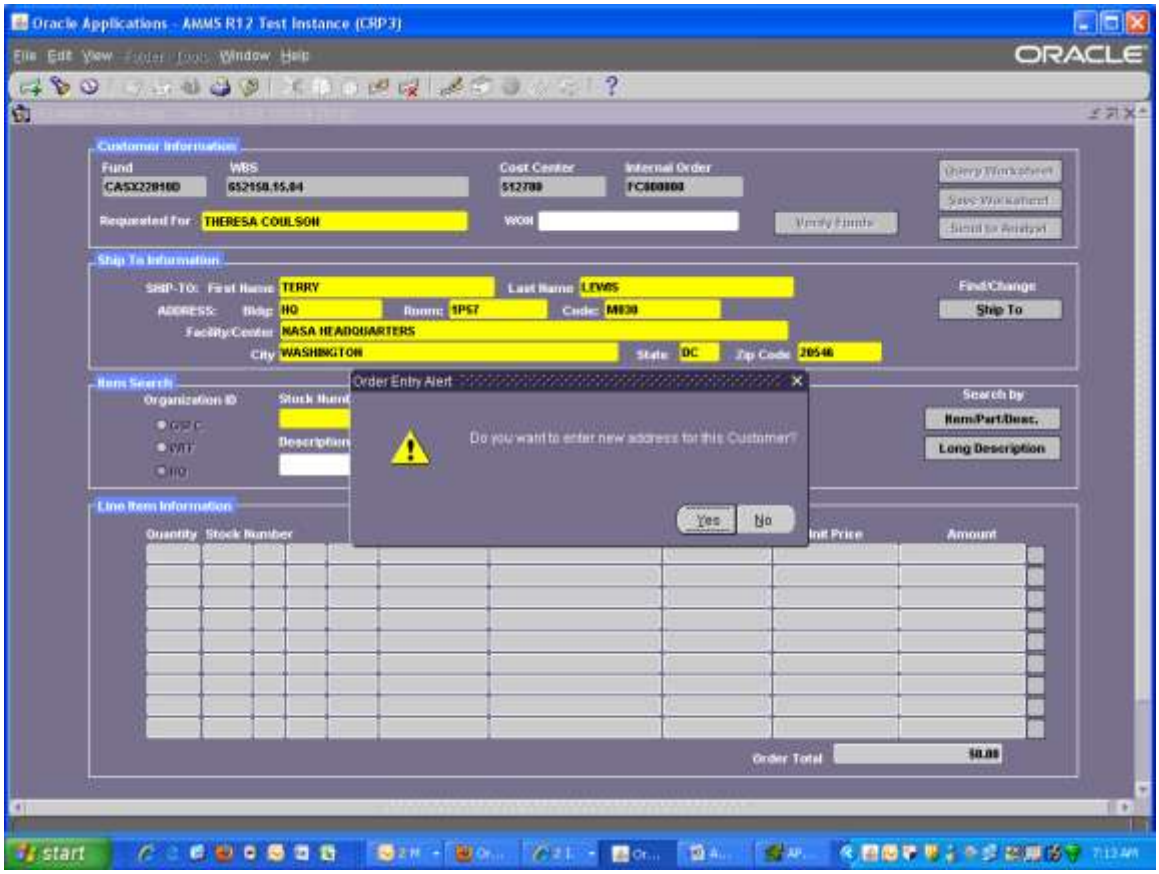
A list of addresses will appear in the new **Ship To Addresses** window. In the **Find** field on the **Ship To Addresses** window, enter your last name with the % sign and click on **Find**, all of the addresses assigned to your name will appear.



Select the address that you want the material shipped to and then click **OK** on the **Ship To Addresses** window.

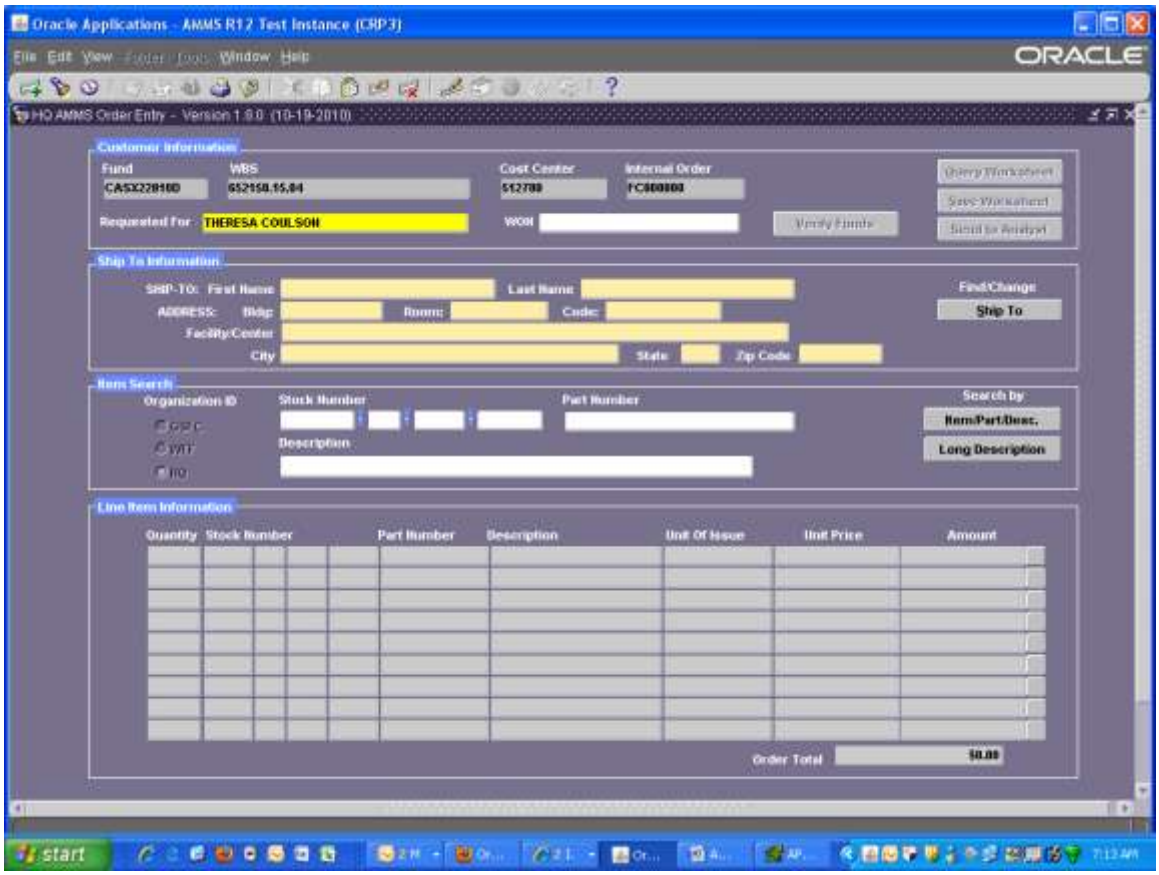


If you do not see the correct address, you can add a new shipping address. In the **Ship To Addresses** window click on the **Cancel** button. You will be asked: *Do you want to enter a new ship to address for this customer?* Click **Yes.**



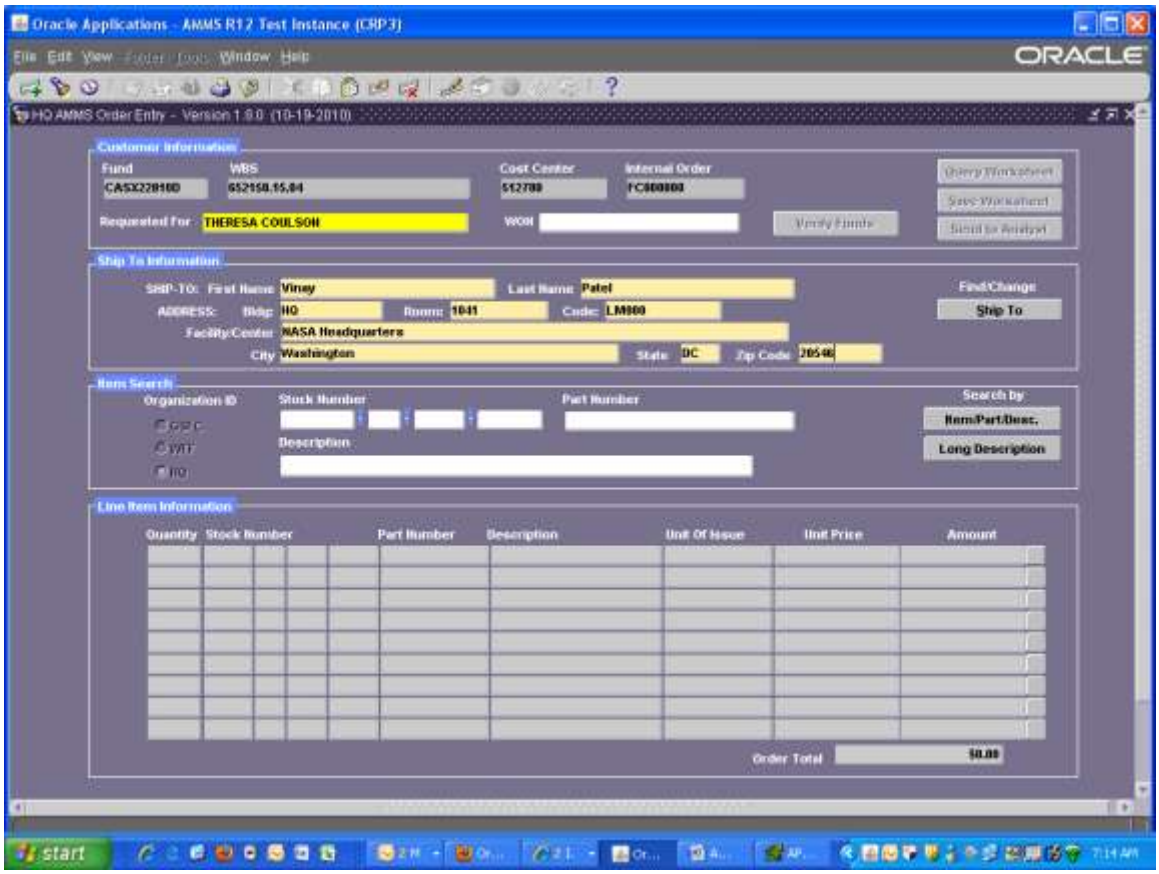
The **Ship to** Fields will be highlighted and will allow you to enter a new shipping address for this order. Enter the new Ship To address in these fields.

Note: For each new shipping address, you will only have to enter it once; it remains in the Ship to database for orders you may place in AMMS.



Enter the following **Ship to** Information.

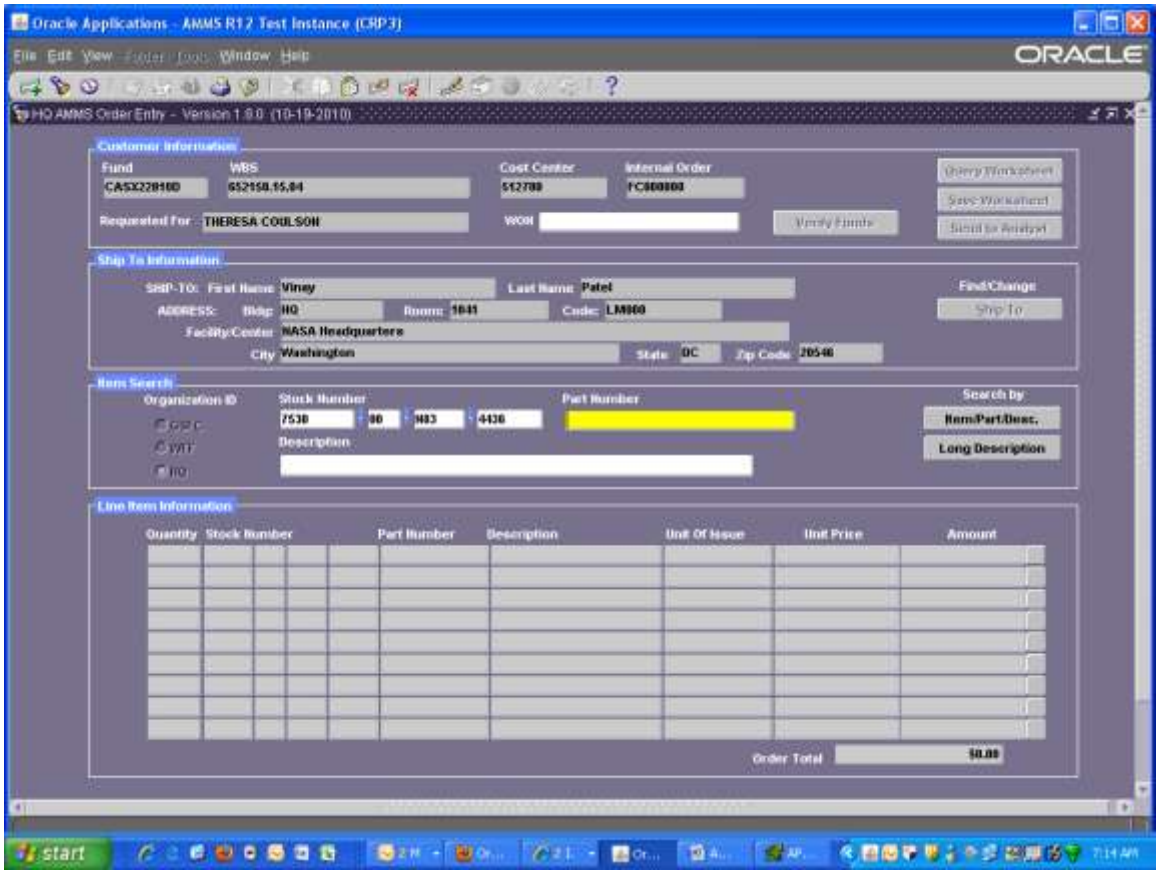
- First Name – Enter your first name in this field
- Last Name – Enter your last name in this field
- Bldg – Enter “HQ” for your building in this field
- Room – Enter your room number at HQ in this field
- Code – Enter your HQ Code in this field
- Facility/Center – Enter “NASA Headquarters” in this field
- City - Enter “Washington” for the city
- State – Enter “DC” as the State
- Zip Code – Enter your HQ five-digit Zip Code in this field



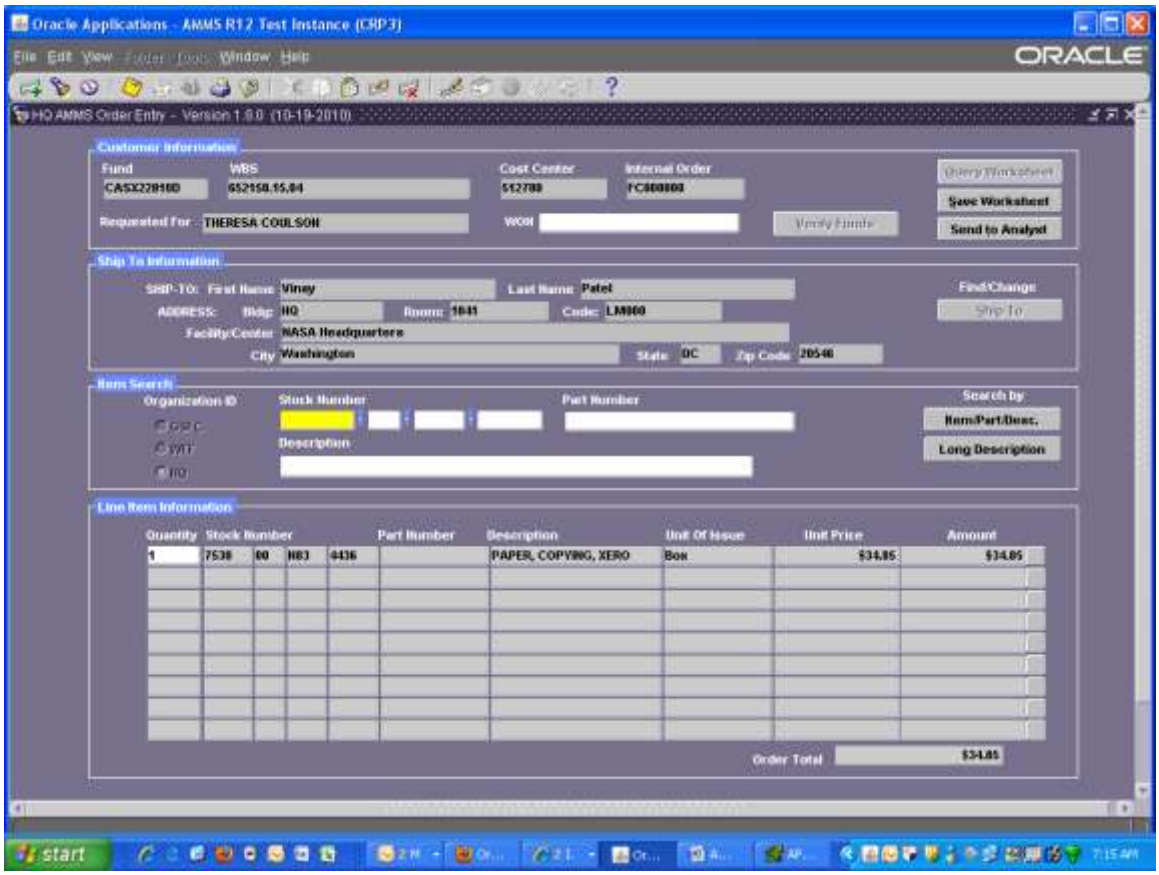
Once you have entered the new shipping address, you are ready to begin entering the actual store stock items for this order. If you are satisfied with the shipping address, tab to or click your mouse in the first field under **Stock Number.**

Step 2E: Entering Stock Numbers for Your Order

In the **Item Search** area, enter the four parts of the Item Number in the **Stock Number** field, and then click on the **Item/Part/Desc** button.



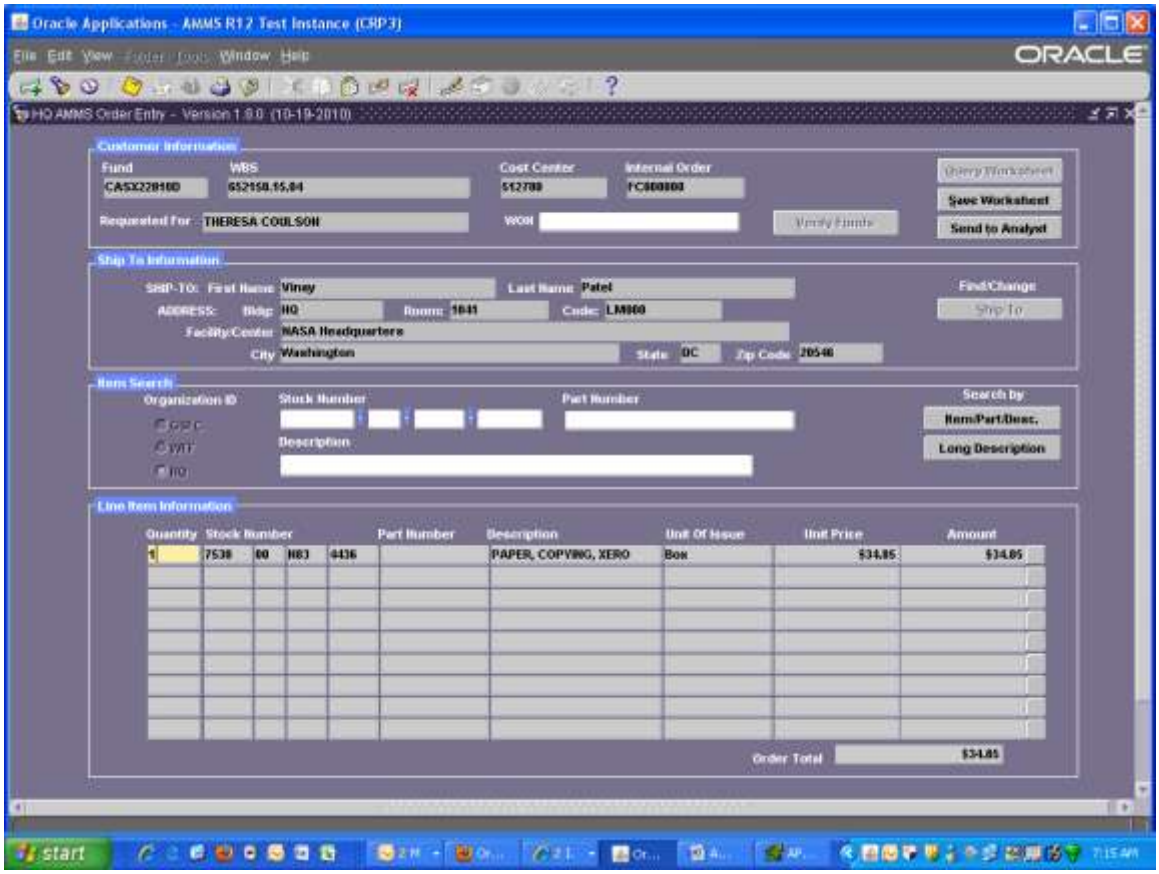
Information about item entered will appear in the **Line Item Information** section.



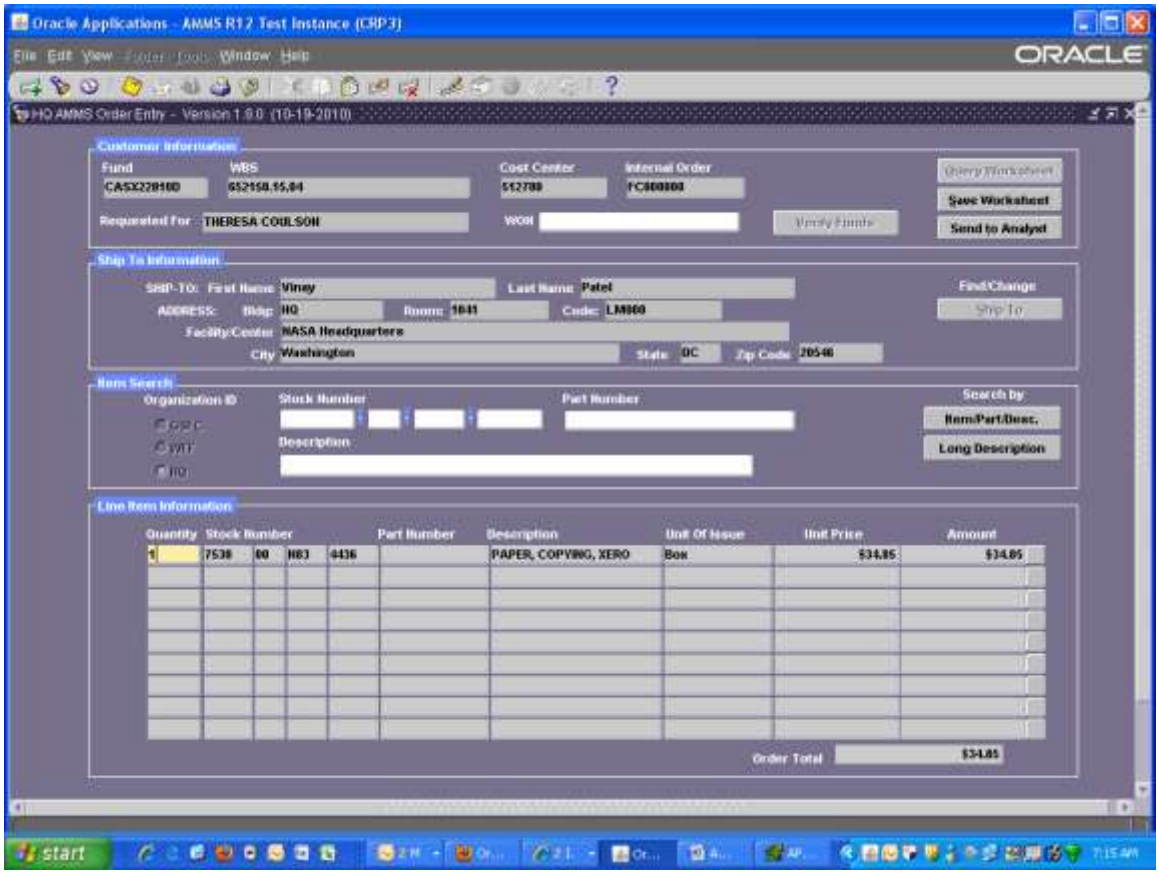
Step 2F: Updating the Line Item Quantity

By default the quantity will for each line item ordered default to 1. If you want to order more than one of this item, you can change the quantity.

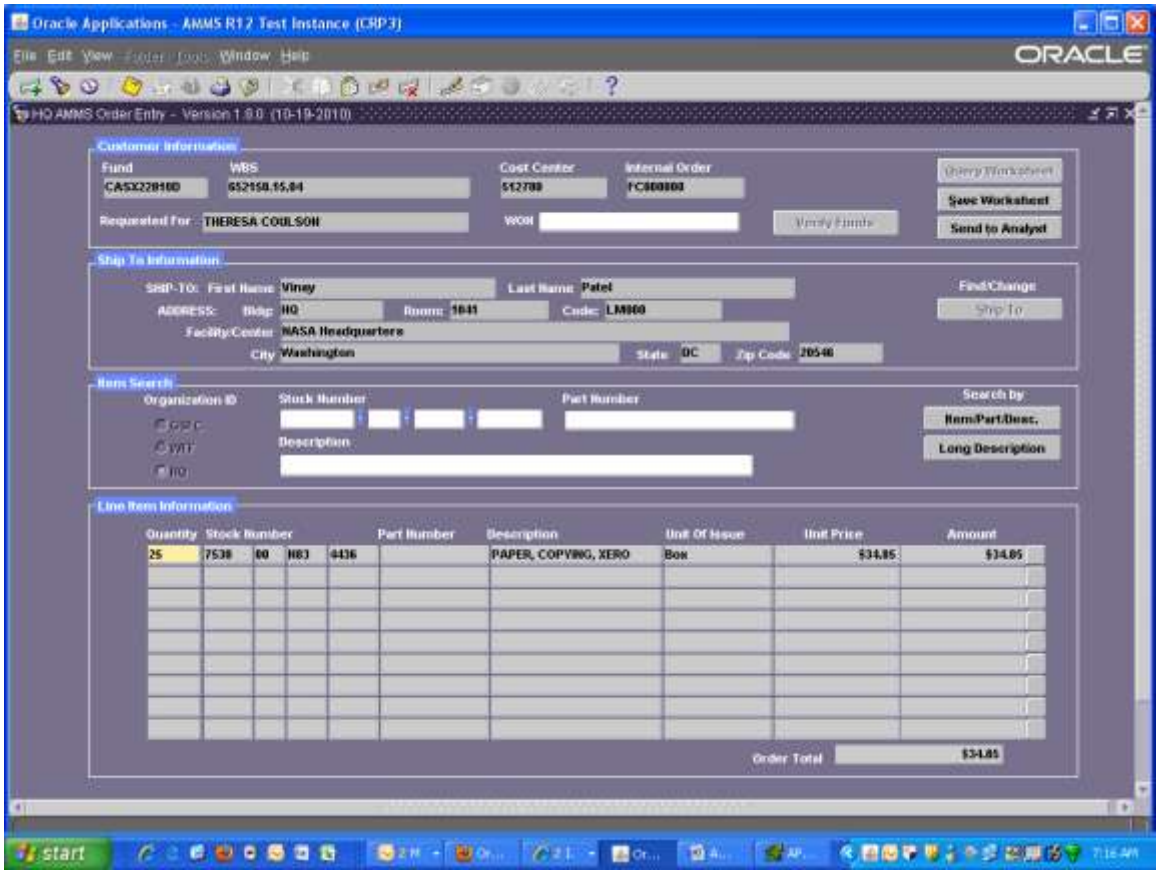
Click in the **Quantity** field for the line item.



The **Quantity** field will turn yellow and allow you to make changes in that field.



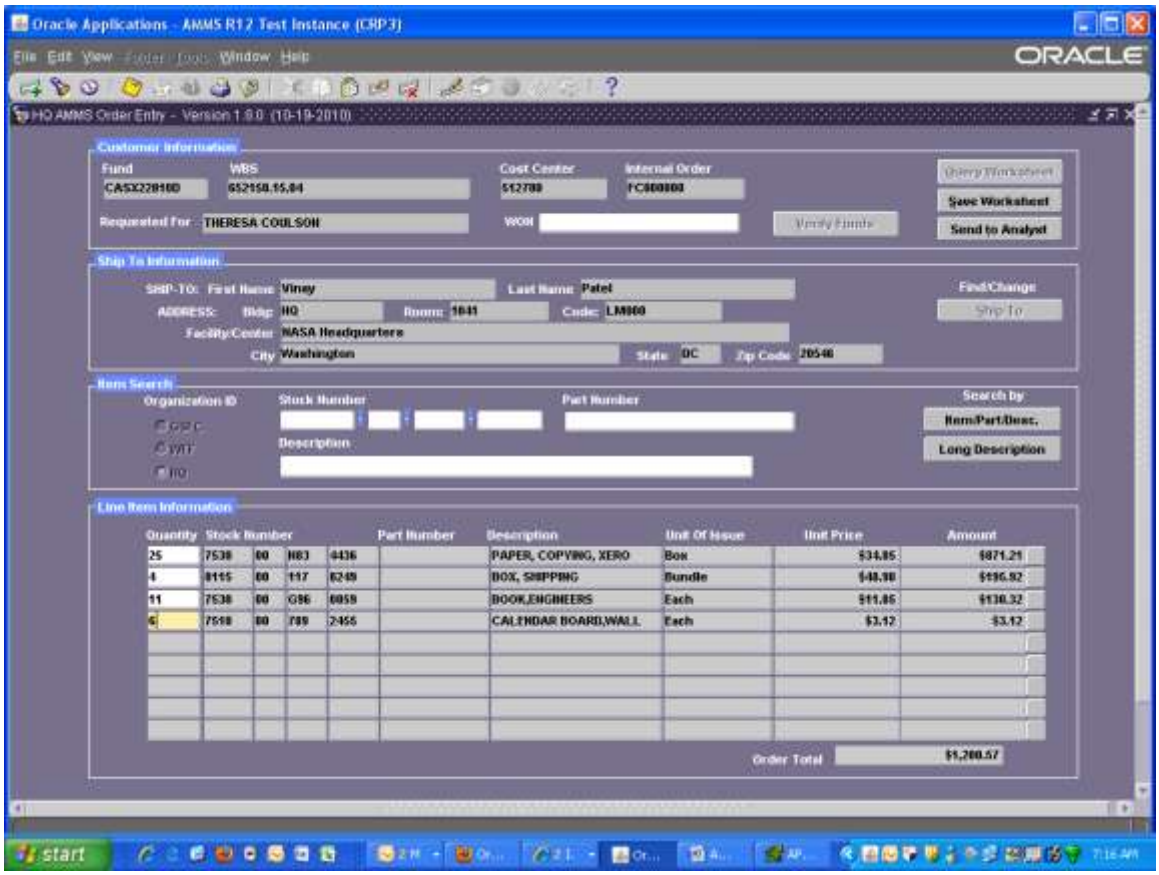
Change the quantity for that item and then click back in the **Stock Number** field in the Item Search area to add another line item.



Step 2G: Entering Additional Order lines

You can add up to 99 lines to one order just repeat the steps where you enter the item number, remember to update the quantities if needed.

All items will be in the **Line Item Information** section, verify that your quantities are correct.



Step 2H: Completing Your Order

One you have entered all of the items for order, you are now ready to begin completing your order. At this point you have two choices:

- You can ***save your order (worksheet)*** so you can add more line items to the order at a later time
- You can ***send your order (worksheet) to the Analyst*** for review and actual submission for processing.

Note:

Your order is not processed by AMMS until you send your order to the Analyst.

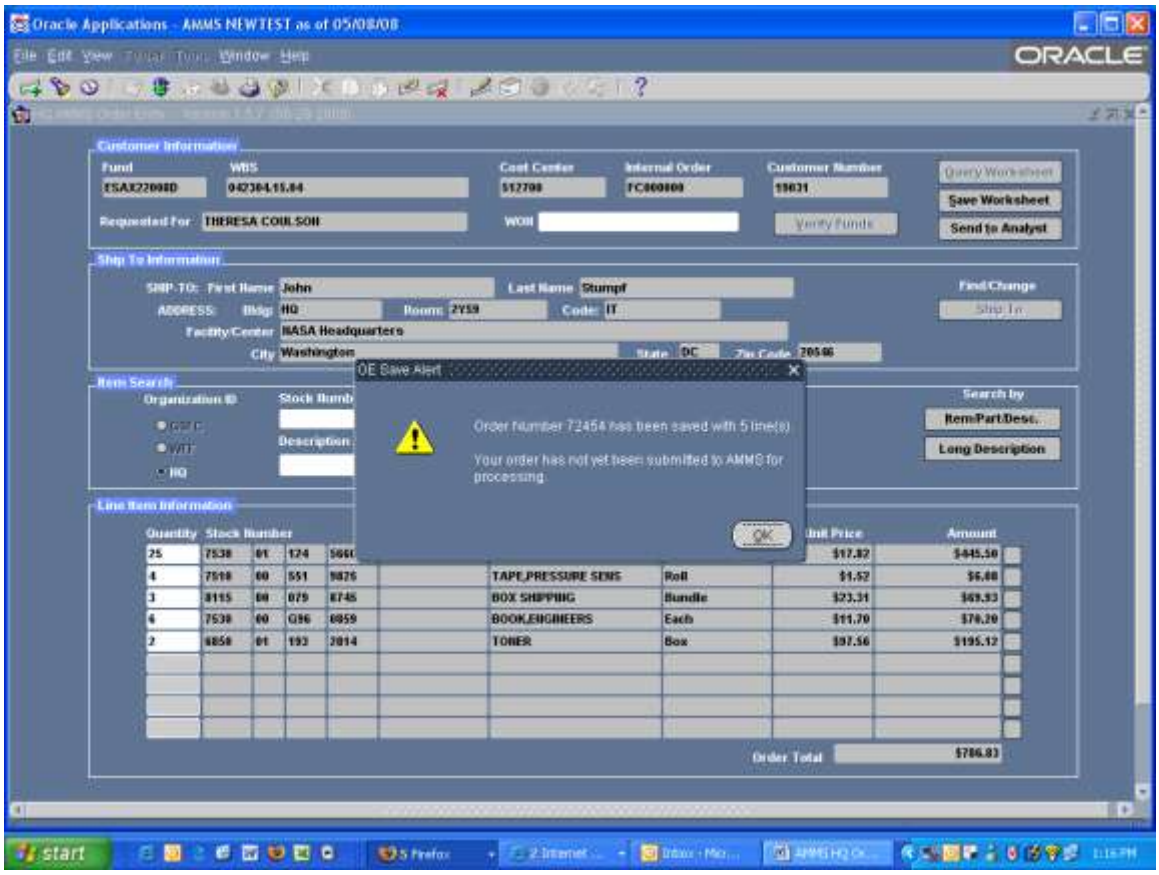
At that time, the AMMS Analyst will be notified that your order is ready for review; they will review and approve the order, and then submit it to AMMS for processing. Once the order is submitted for processing, then it is considered "placed" and will be delivered to your desk when Office Depot fulfills the order (usually the next day)

Saving Your Order

To ***save your order*** so that you can go back and add more lines (or to modify an existing line item), click on the **Save Worksheet** button

If there are enough funds to cover the cost of the items you are ordering You will receive an alert message saying your order has been saved, the order number and the number of lines in your order, and that your order has not yet been submitted to AMMS.

Please take note of this order number because you will need it to add future lines to the order or to send the order to the analyst.



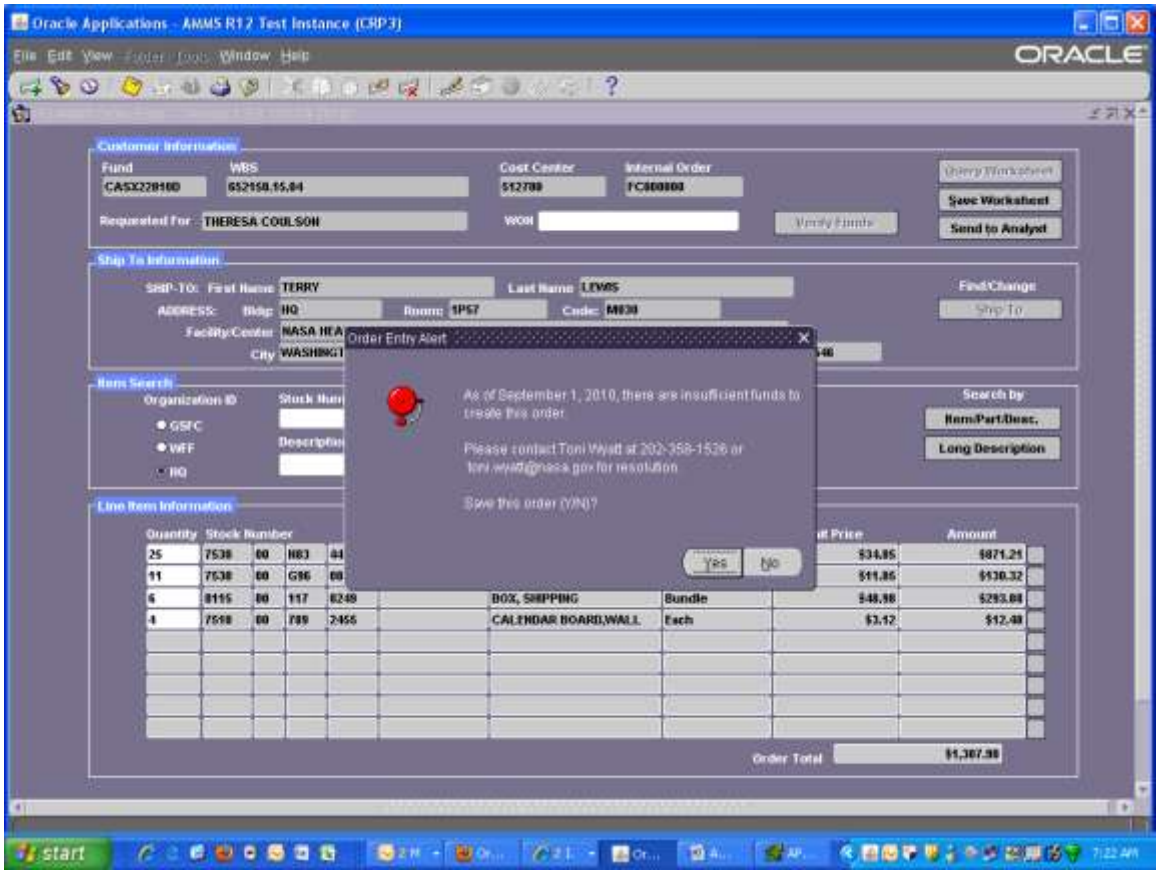
Click **OK** to the OE Save Alert box.

You will now receive another AMMS Alert box asking you if you want to print your order. To print your order, see ***Step 2I: Printing Your Order***.

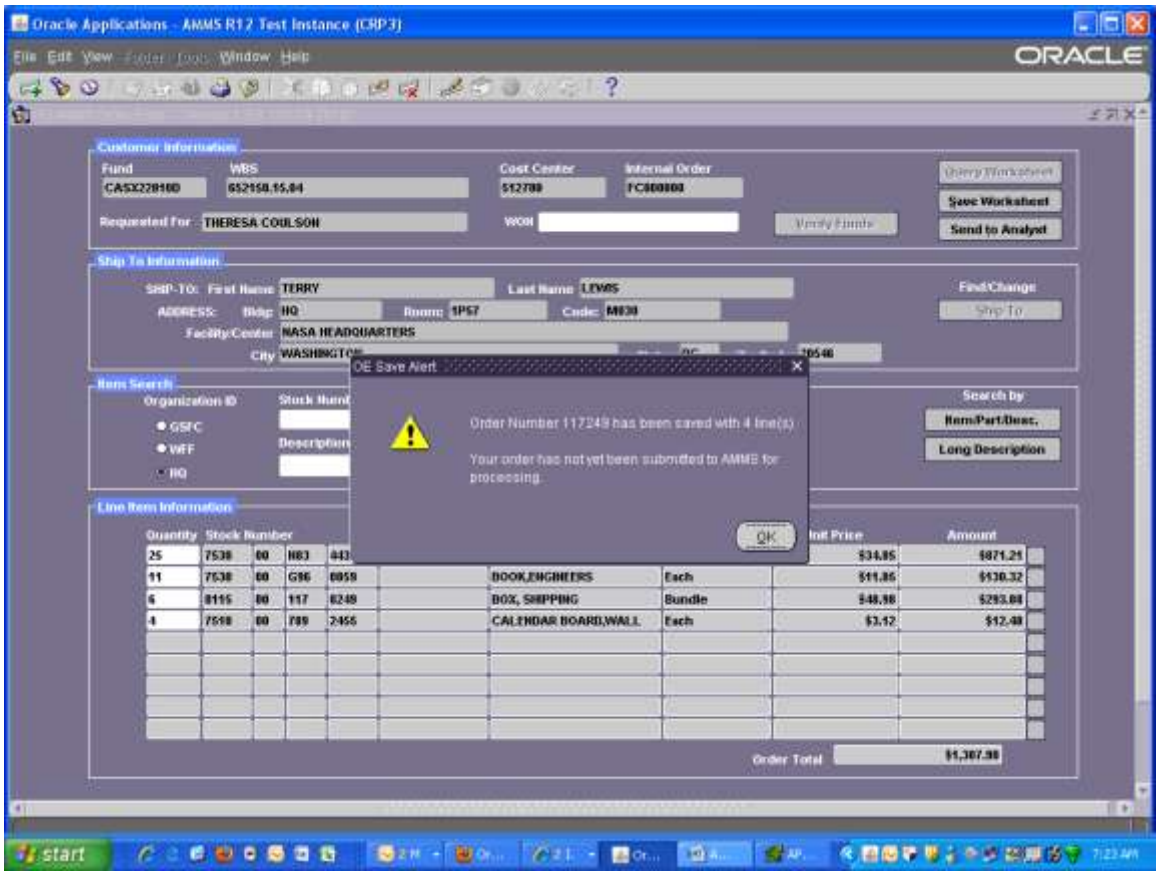
Saving order with Insufficient Funds:

To ***save your order*** so that you can go back and add more lines (or to modify an existing line item), click on the **Save Worksheet** button

If there are **not** enough funds to cover the cost of the items you are ordering You will receive an alert message saying there are insufficient funds with contact information, you will still be able to save your order, the order number and the number of lines in your order



Take note of the order number:



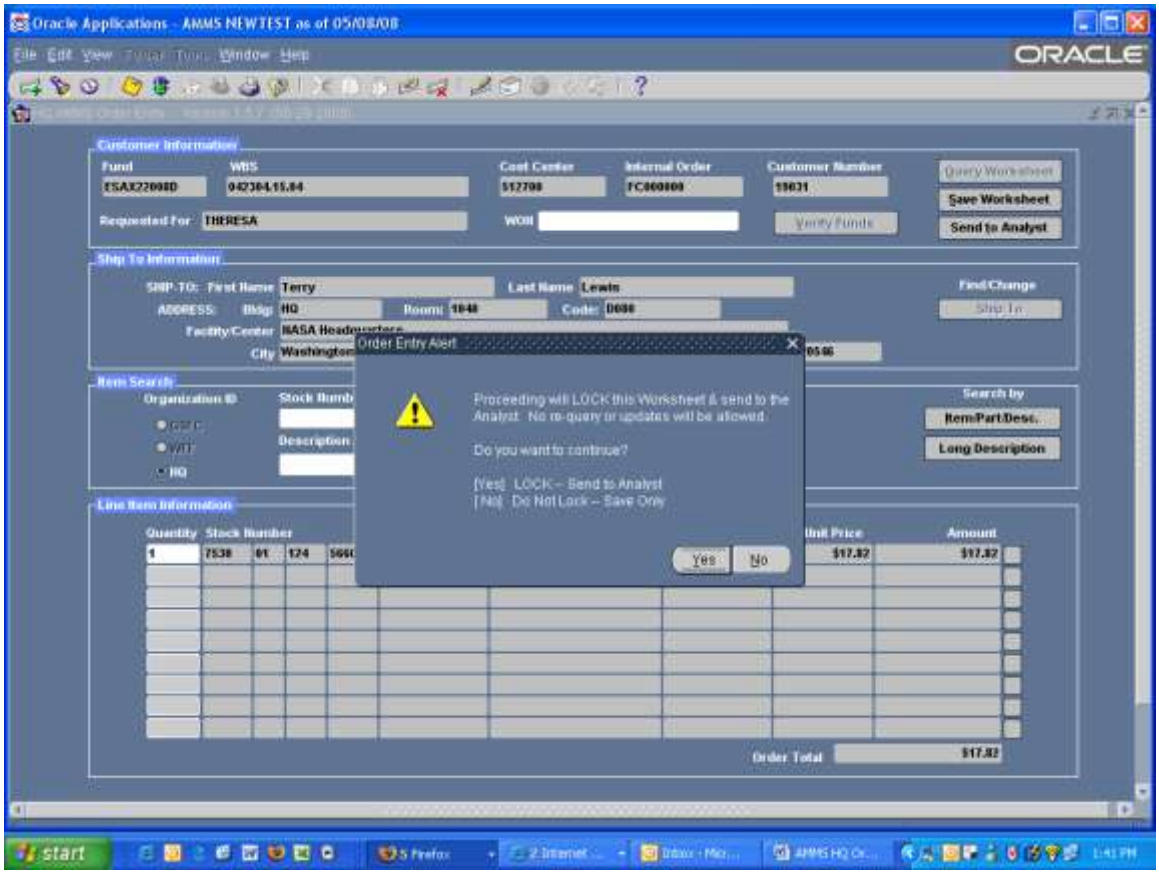
Sending the Order to the Analyst

Your other choice is to send the order to the Analyst for review and approval.

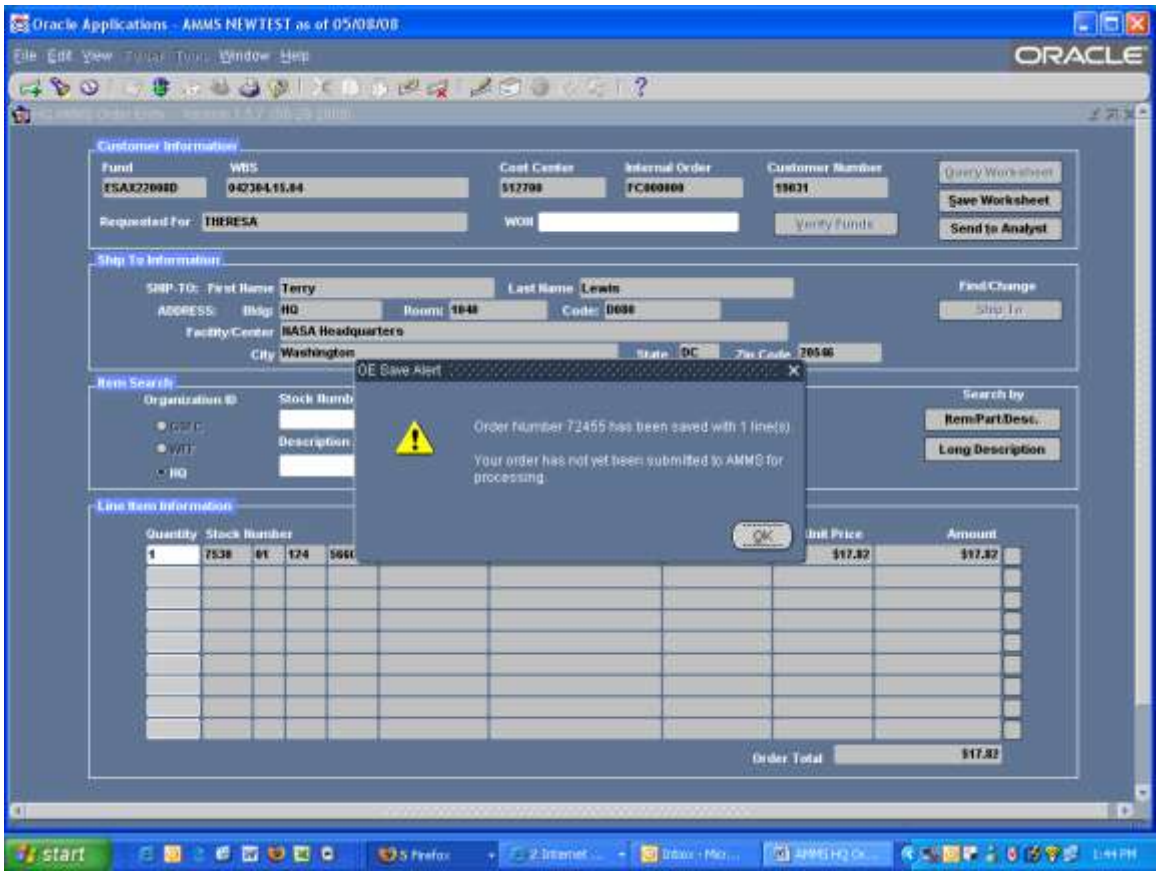
To ***send your order for approval*** click the **Send to Analyst** button. This will check to make sure there are funds available and if so send the order to one of the AMMS Analysts at HQ for review and approval in AMMS so that you will receive your suppliers.

You will receive an Order Entry Alert: "*Proceeding will LOCK this worksheet and send to the Analyst. No re-query or updates will be allowed"*.

You can either respond "**Yes**" to lock this order and send it to the Analyst for review or "**No**" to only save the order. If you respond "No" then, your order is only saved and you can modify the order at a later time. If you are sure that you do not want to add any more items to the order, click "**Yes**"



When you Click **Yes** to send the order to the Analyst for approval, you will receive an OE Save Alert with your AMMS order number, the number of lines saved, and that your order has not yet been submitted to AMMS for processing. However, the order has been sent to the Analyst for review.

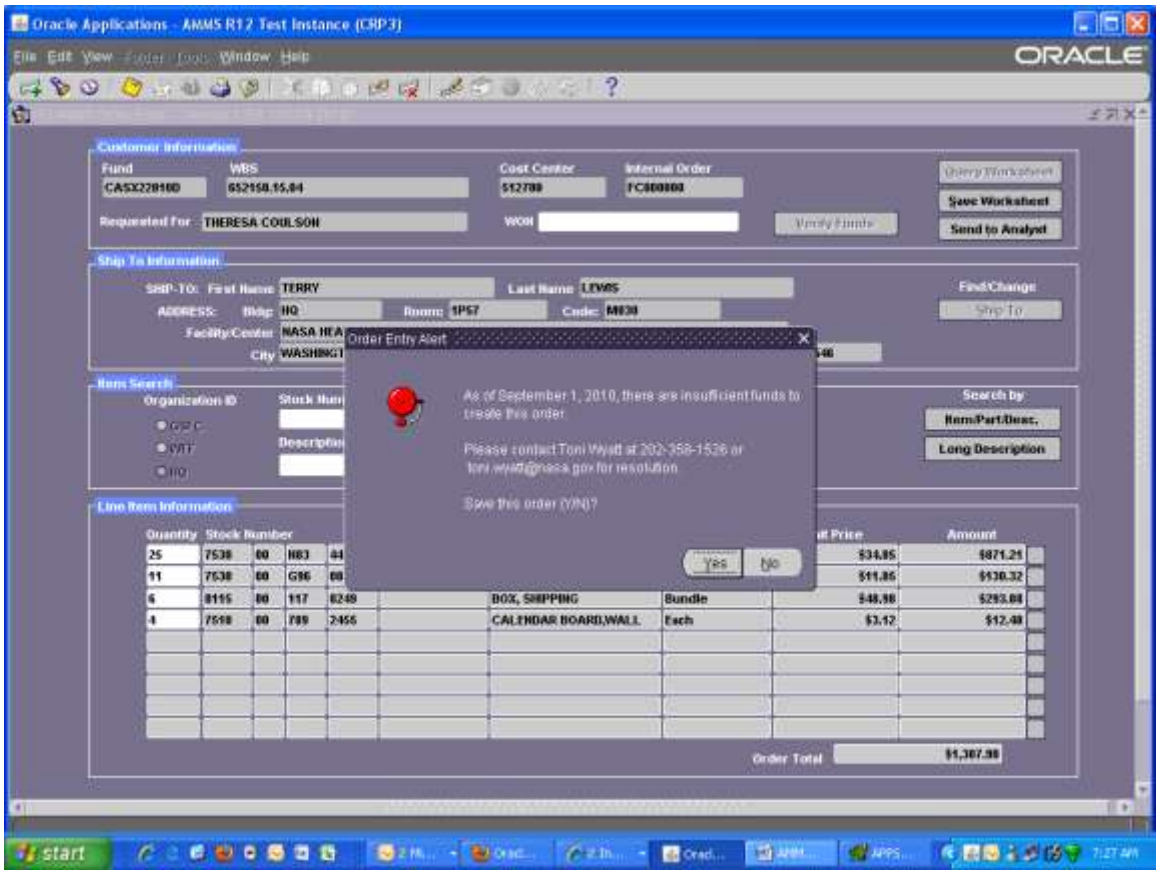


You will now receive another AMMS Alert box asking you if you want to print your order. To print your order, see ***Step 2I: Printing Your Order***.

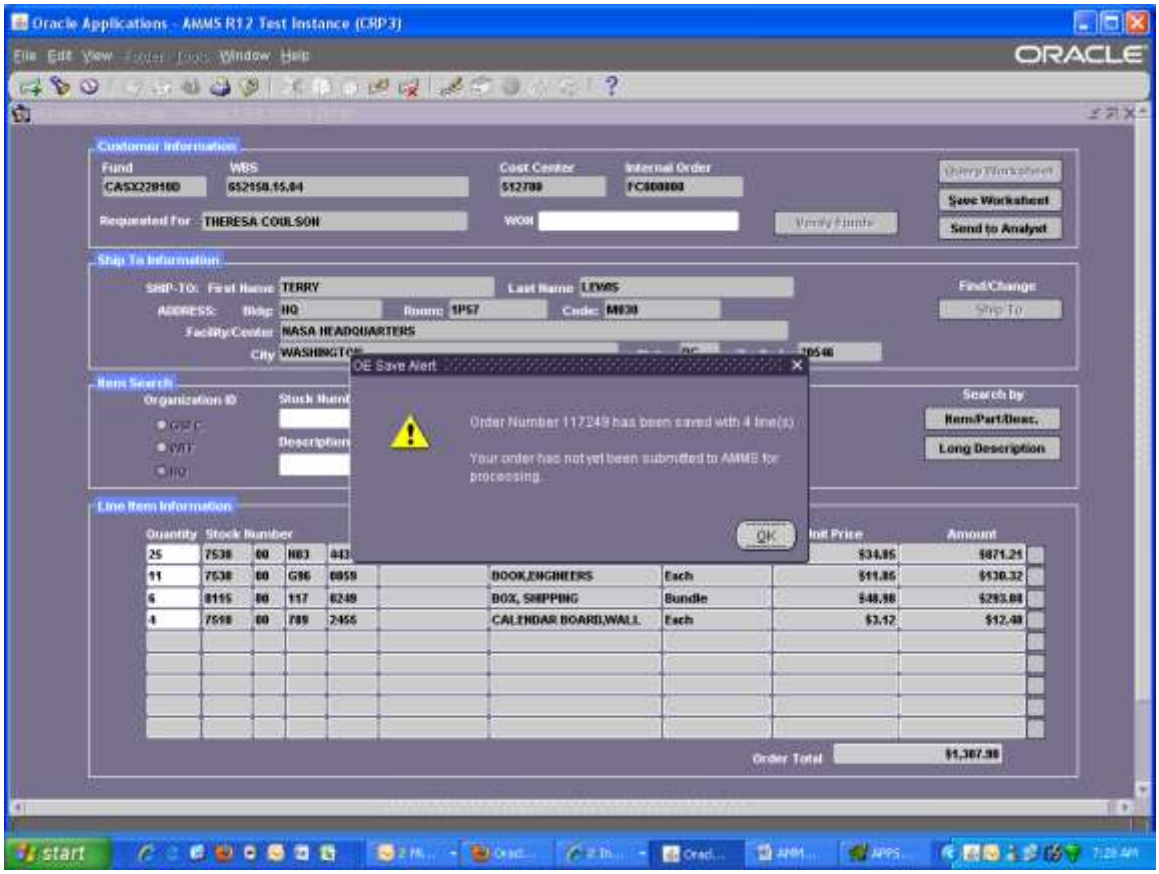
Sending the Order to the Analyst with Insufficient Funds

Your other choice is to send the order to the Analyst for review and approval.

To ***send your order for approval*** click the **Send to Analyst** button. This will check to make sure there are funds available and if there are not funds available you will get an alert message with who to contact.
You will still have the option to save the order requery and submit when funds are made available:

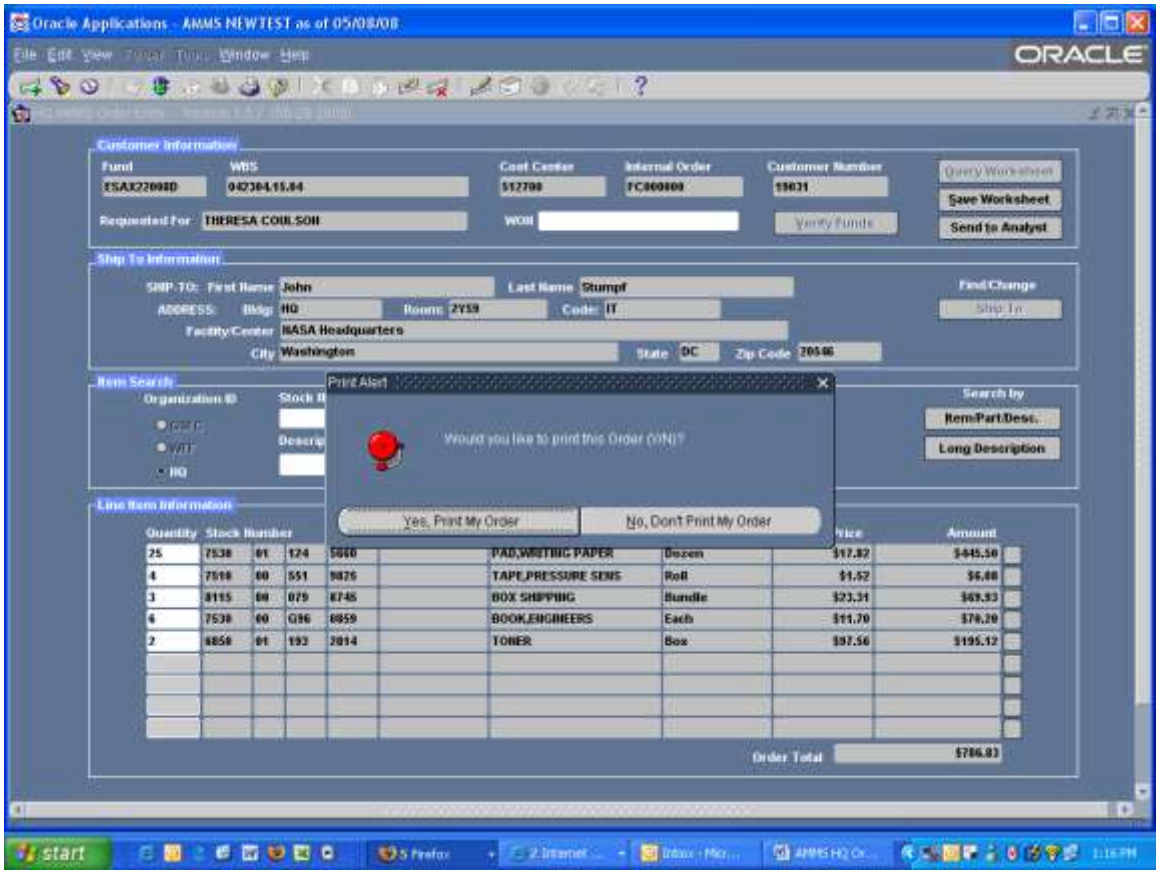


Saving order with Insufficient Funds, click yes and take note of your order number



Step 2I: Printing Your Order

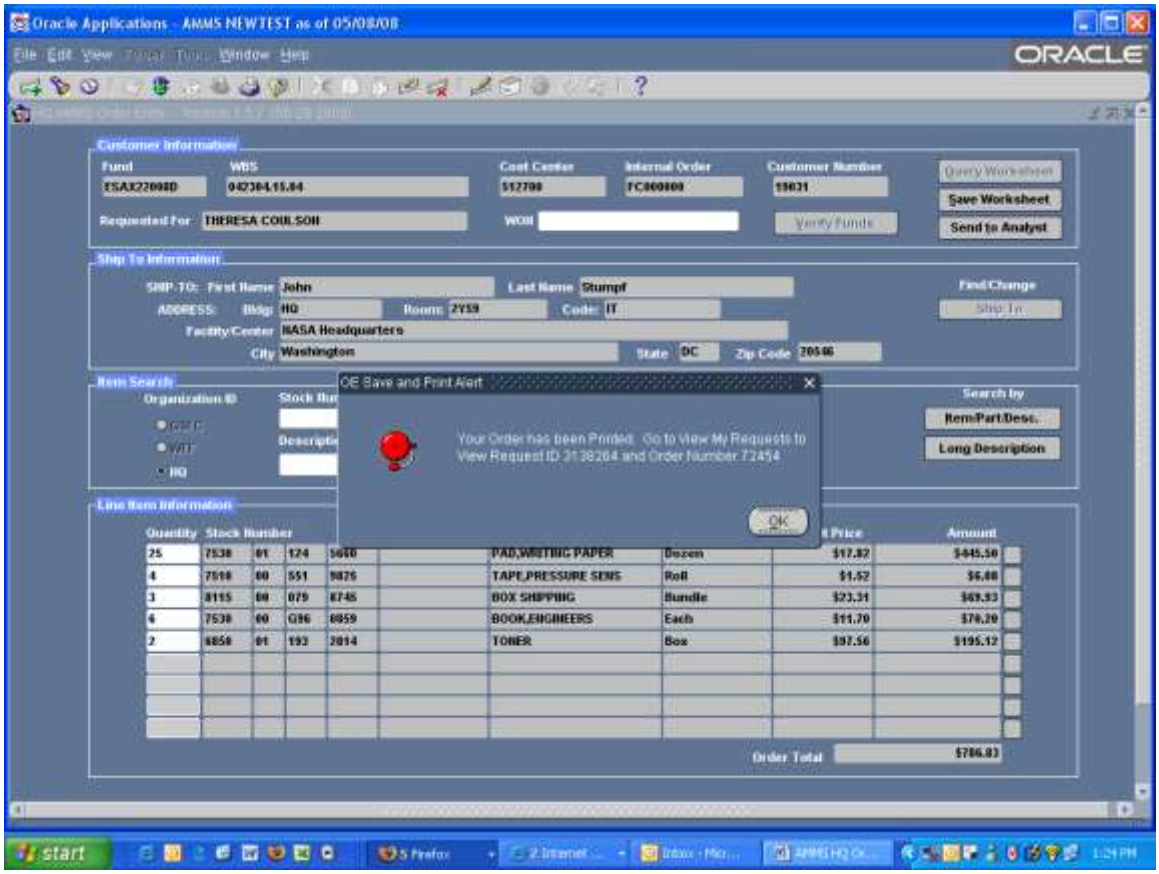
After you have either decided to save your order or to submit your order to the Analyst, you will be provided another alert box asking if you want to print your order. Although the alert box says "print", AMMS is actually making an Adobe Acrobat PDF copy of your order so that you can either print your order on your workstation's printer or you can save the PDF file for later reference.



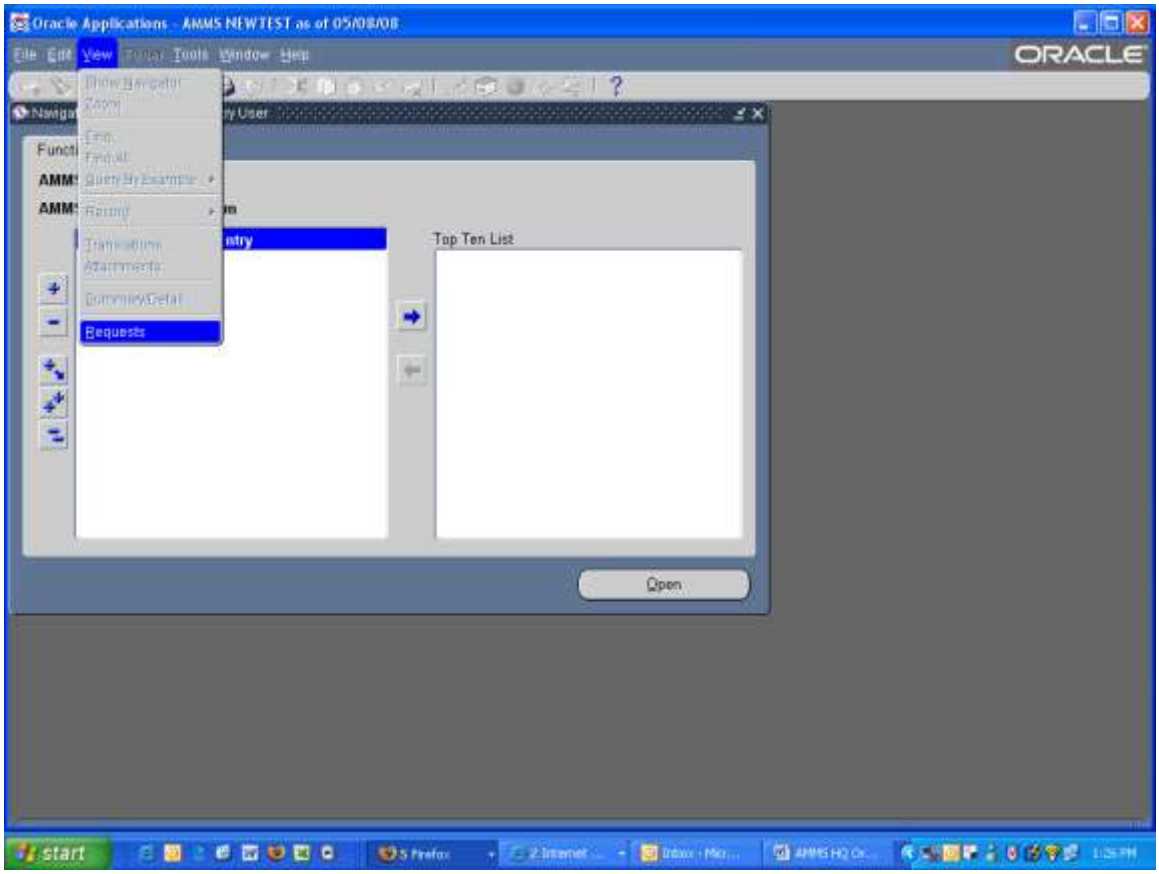
If you click "**Yes Print My Order**" your order will be made available for you as an Adobe Acrobat PDF file. If you click '**No Don't Print my order**" your order will still be saved but will not be printed.

Note: It is strongly suggested that you print your order for later reference. It contains your order number as well as a listing of every item that you placed on this order.

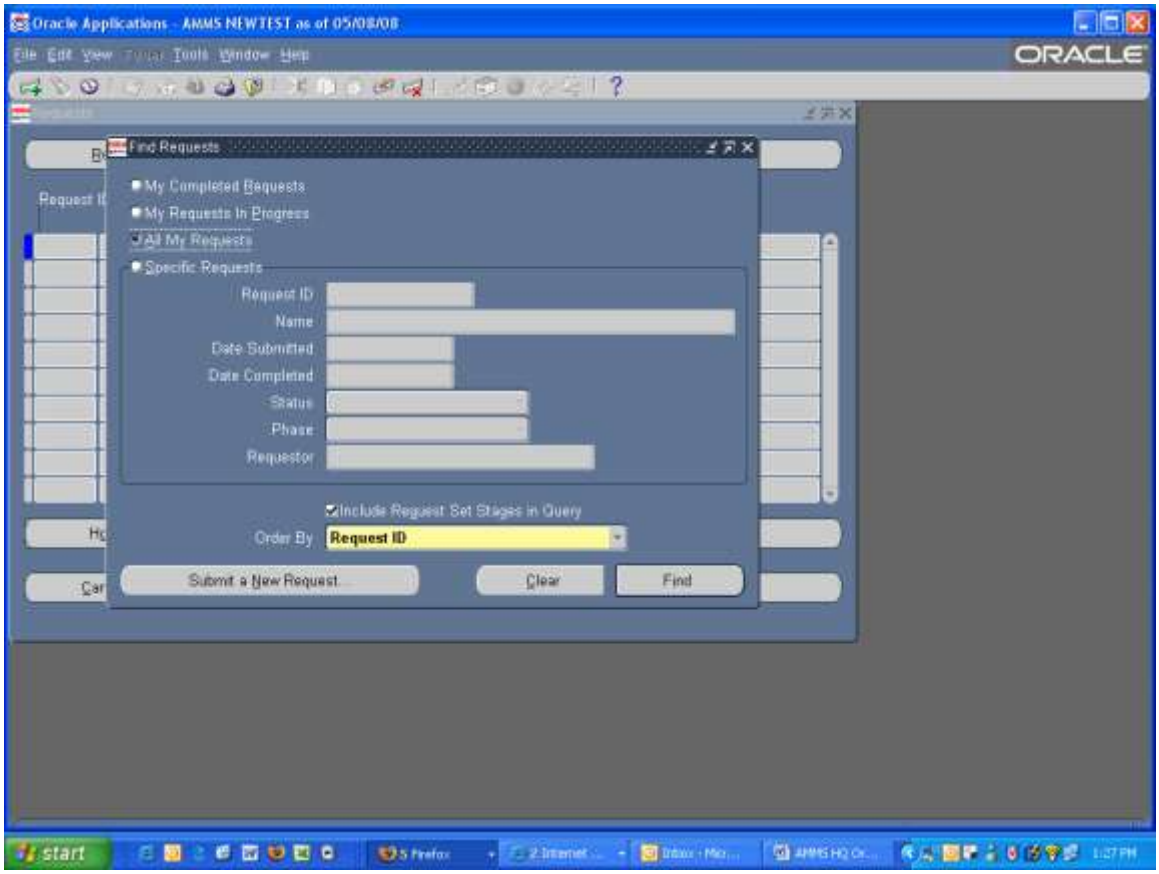
If you click "**Yes, Print my Order**" you will receive an **OE Save and Print Alert,** telling you your order has been printed, and to go to **View Requests** to view your order



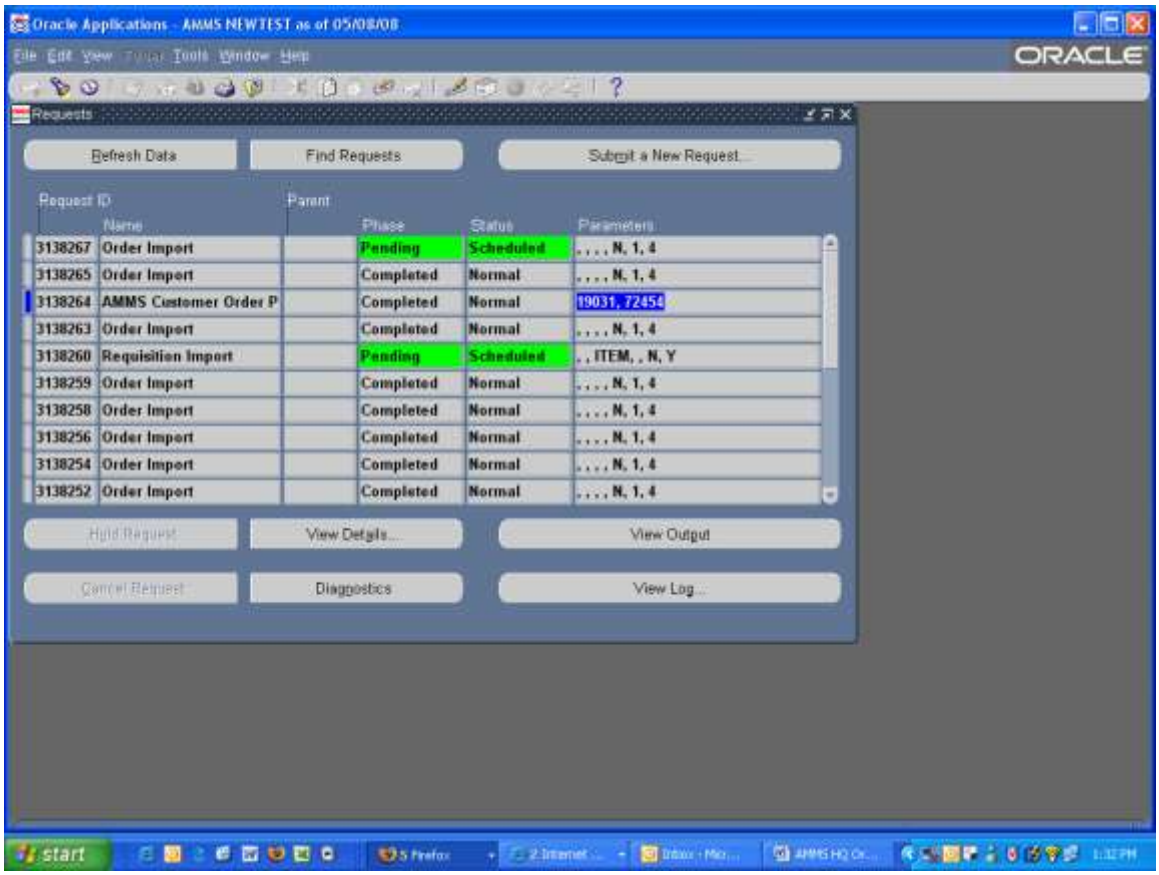
Click **OK** to the **OE Save and Print Alert,** the **HQ AMMS Order Entry** form will clear. Close the **HQ AMMS Order Entry** Form, then from the toolbar select **View** and then select **Requests**



The **Find Requests** window will appear, make sure that **All My Requests** is selected, and click on the **Find** Button.

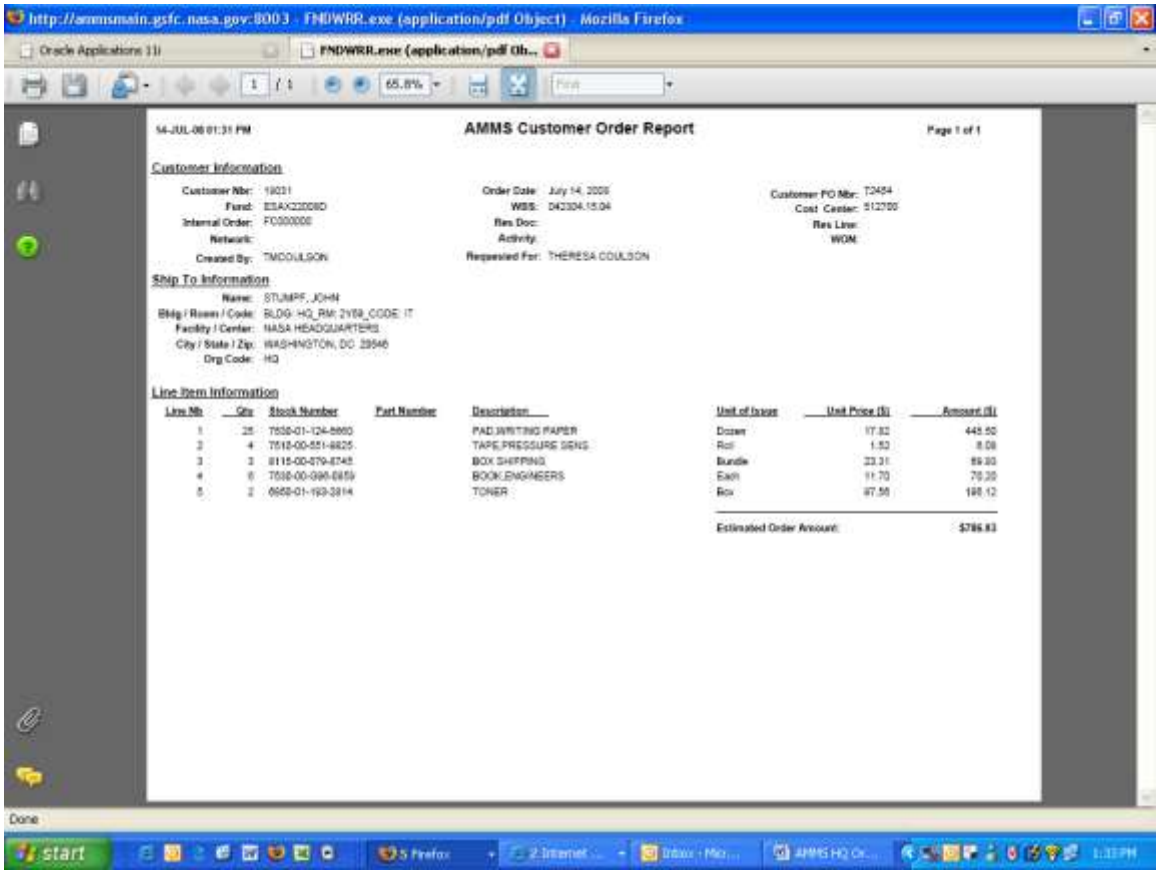


A list of all of your requests will now display.



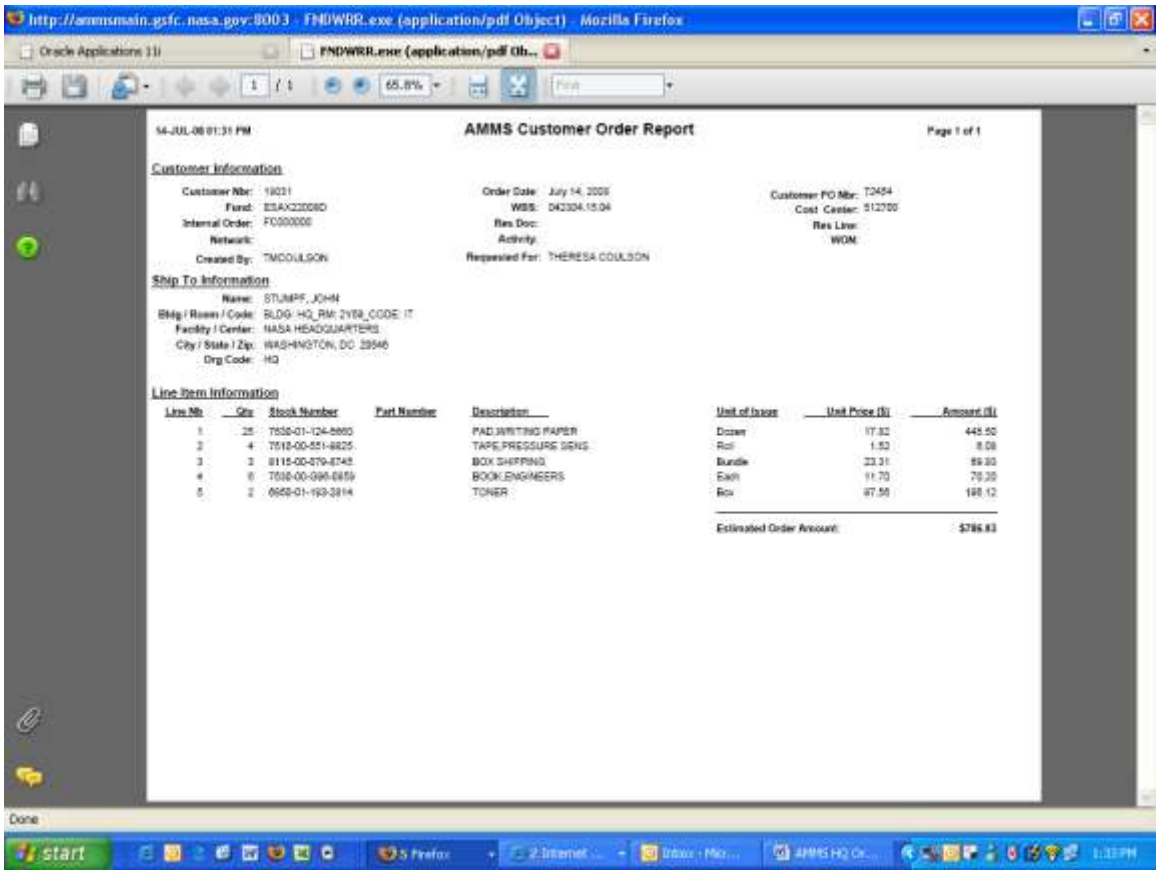
You are looking for the **AMMS Customer Order Report.** To the right on each line (under the Parameters column), you will see your Customer Number and the AMMS Order Number. Make sure that the line indicator (far left column is blue) is on the line you want to print; if not click on the order you want to print. To view the PDF version of your order, click on the **View Output** button.

A new window will appear and Adobe Acrobat will open with the **AMMS Customer Order Report** for your order.



From this window, you can either print your order or save it to your workstation as a PDF file..

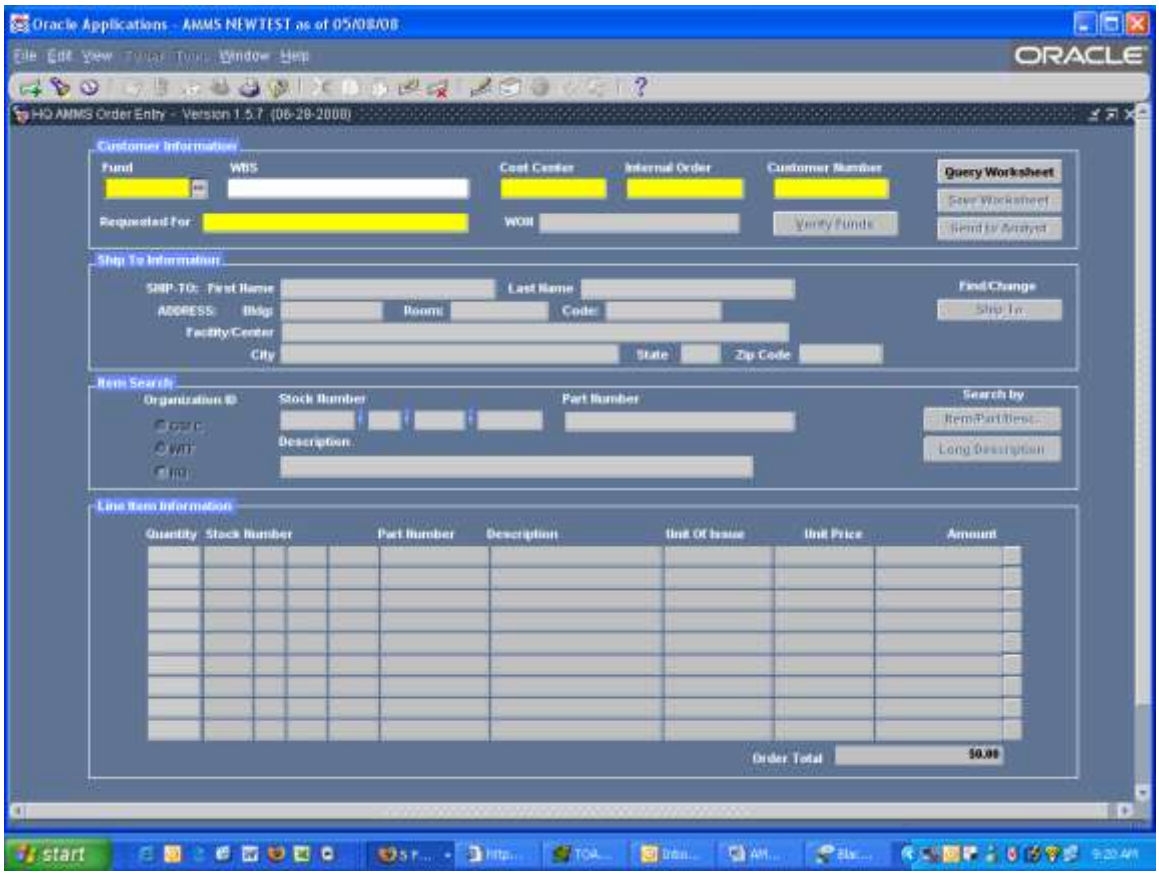
- To print the order click on the printer icon on the toolbar.
- To save the order to your workstation, click on the floppy disk icon on the toolbar and save your document. Once the document has been saved to your workstation, you can open the order at anytime to review it or to print it.



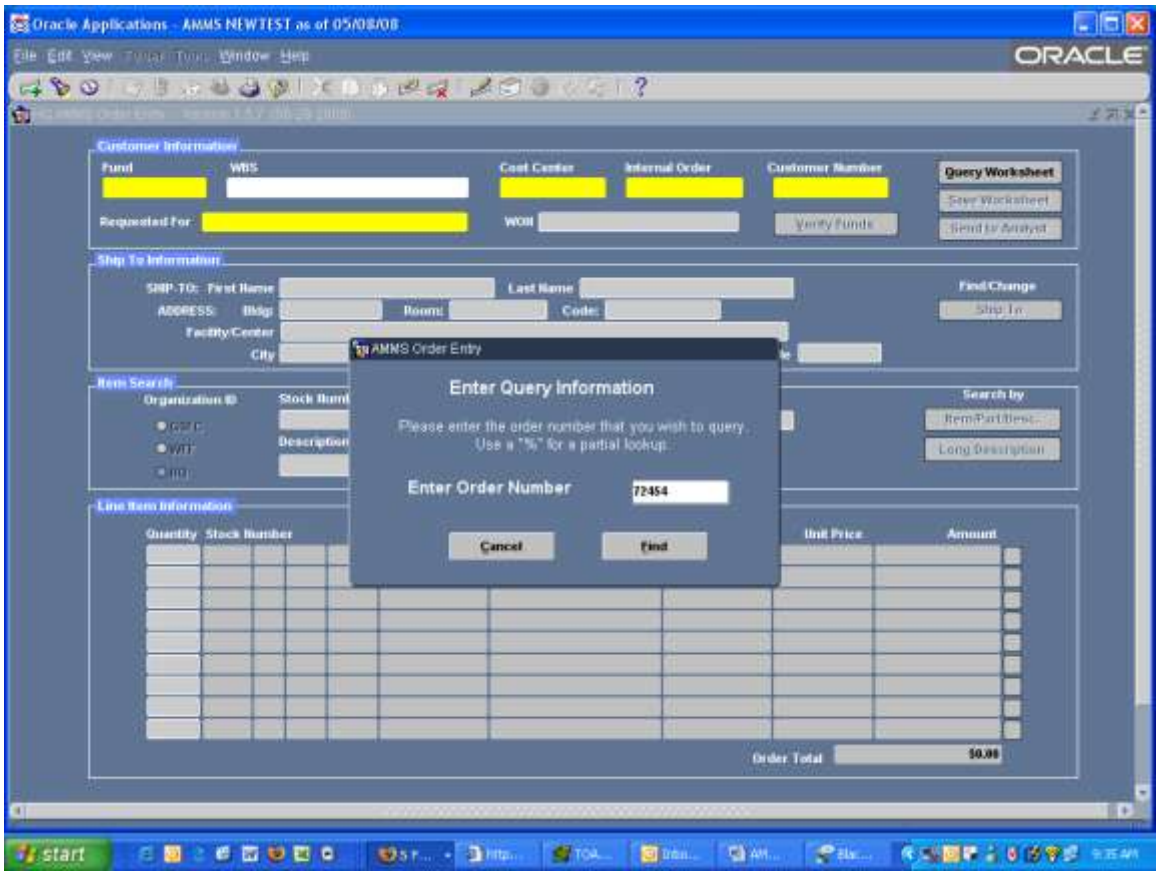
Step 2J: Querying A Saved Order

Once you are ready to add more lines to your order and send the order to the analyst for review, you will need to query your saved order and complete the order processing.

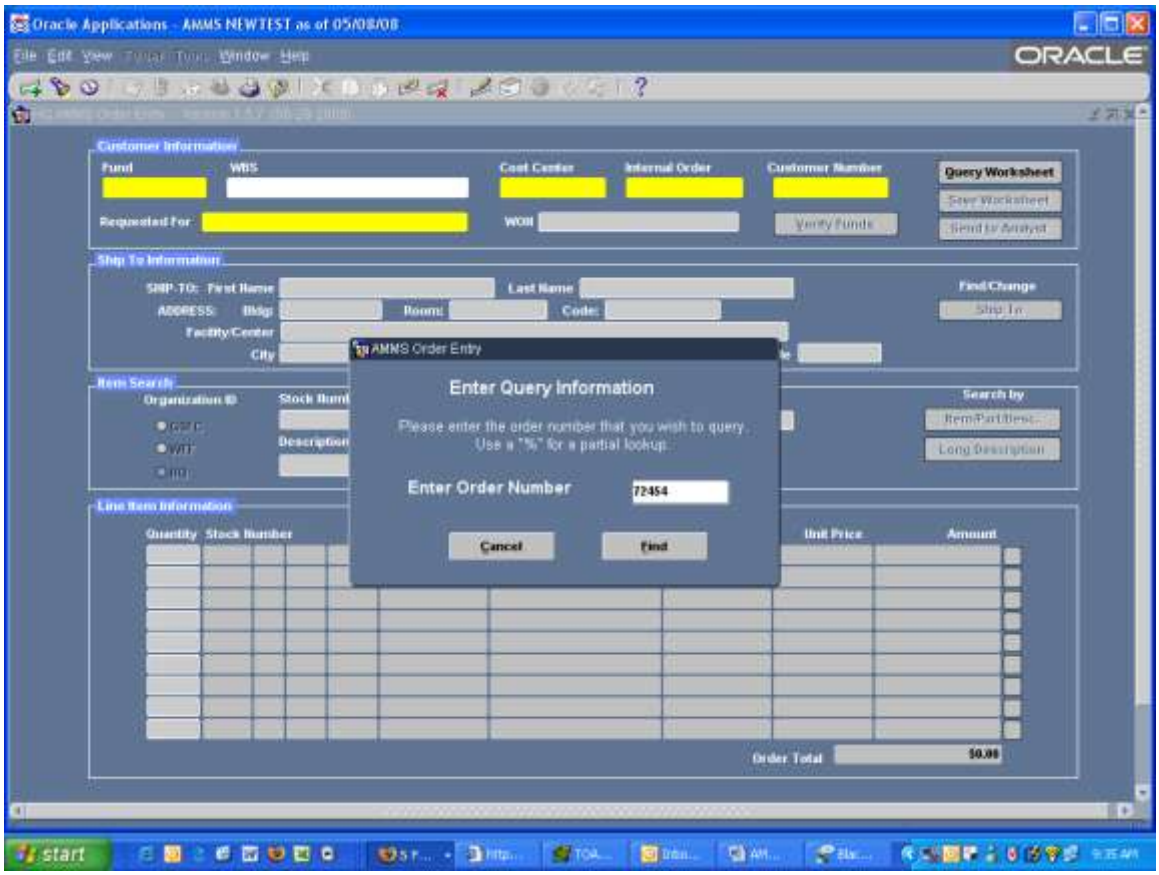
Open **HQ AMMS Order Entry** Form and click the **Query Worksheet** Button



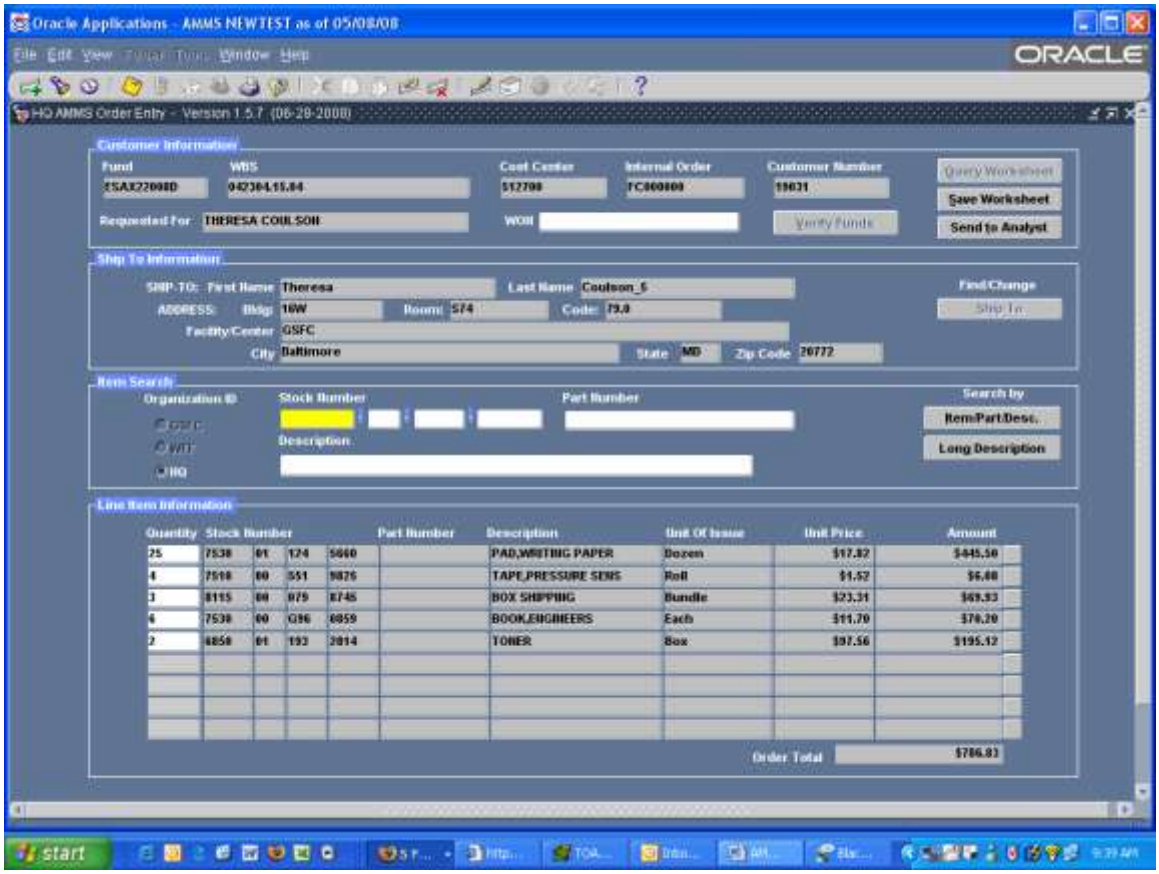
In the **Enter Order Number** field, enter the number of the order that was saved.



Click on **Find**



You original order will appear. At this time you can add more items to the order or make changes to the existing items on the order.



To add a new line item to the order, you need to enter a new stock number in the Item Search fields like you did to add the original line items in section ***Step 2E: Entering Stock Numbers for Your Order***

To change the quantity of an item in your order, follow the instructions outlined in the section. ***Step 2F: Updating the Line Item Quantity***

To delete a line item from your order, click in the quantity field of the line you want to remove from the order. Then click on the Delete icon on the toolbar.