ESP FINANCIALS
◆ User Training ◆

MSR TRAINING
PARTICIPANT GUIDE

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♦ MSR Training ♦

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**Exercise 1: Running the Item Catalog**

**Scenario:** You want to have an electronic and printable copy of all items currently available through the inventory stores.

**Step 1.** To access Item Catalog nVision, Navigate to

**Reporting Tools, nVision Control Centre**

![nVision Control Centre](image)

- **Report Manager** 
- **Process Monitor**

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<th>Report Type</th>
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<td>AM Accumulated Depreciation Reconciliation</td>
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Click on the **Report Book** hyperlink

**Expected Results:** Report Books page opens in a new window.
Step 2. Enter or select the following:

As Of Date: Use Business Unit Reporting Date
If this option is selected the report will run for the end of the Previous Period. The advantage to using the Business Unit Reporting Date is that when you go to run your EOP Reports at the end of next period you don’t have to change the date just requeue the series. If you choose Specify the date entered is used to determine the appropriate Accounting Period on which to Report. NEVER select Today’s Date.

Tree Effective Date: Leave as Use Reporting Date (DO NOT use the other options)

Business Unit: ANUGL

Report ID: IV74733

Click: Run

Expected Results: The process scheduler page displays.
Step 3.  
Click:  

Expected Results: 
The report book is submitted.

Step 4  
Open the Process Monitor via the hyperlink Process Monitor  to view the progress of the report process. 

Click:  

Expected Results: 
Process runs to success.
Step 5

Return to nVision Control Centre page via the Go back to nVision Control Centre hyperlink, and open the Report Manager from the hyperlink Report Manager, or alternatively on a new page via Reporting Tools – Report Manager.

Click on the file named lv74733.xls to open the excel spreadsheet. If you are asked whether or not to enable Macros click Yes.

Expected Results:

The Report Manager page displays.

End of Exercise.
Exercise 2: Item Availability

Scenario: Before deciding to order an item you want to inquire on whether there are enough items in stock and what the current price of the item is.

Step 1. To access Item Availability, Navigate to

Inventory, Manage Inventory, Review Inventory Balance Info, Item/Product Availability

Click: the Search hyperlink

Expected Results: Availability Inquiry Selection page displays.
Step 2. Enter or select the following:

Unit: RSC
Item: 100020

Expected Results:
The Item Availability panel displays with quantity and price information.

End of Exercise.
**Exercise 3: Material Stock Request**

**Scenario:** You need to order several items for a project you are working on and so you raise a material stock request.

**Step 1.** To access Material Stock Request, Navigate to

**Inventory, Fulfil Stock Orders, Stock requests, Create/Update Material Stock Request**

Ensure the following:

- **Business Unit:** RSC
- **Order No.:** NEXT
- **Request Type:** Internal Issue

Click: **Add** or press: Enter

**Expected Results:** Stock Request Summary page displays.
Step 2. Enter or select the following:

- **Location:** F&B600
- **Item ID:** 112358
- **Quantity:** 1

**Note:** The available to promise link transfers users directly to the item availability panel if needed.

**Expected Results:** Correct data entry.
Step 3. Tab out of the quantity field and a new panel will appear, or select the link [Override ChartFields].

Note: The Work Order field will only appear if the Location Code is linked to Maximo – i.e. it has a jurisdiction of MAXIM.

Expected Results: Chartfield Overrides page displays.

Step 4. Enter or select the following:

Speedtype Key: Q411800701

Tab out of the speedtype key field and the chartfield panels below will populate.

Note: If you are using a barcode scanner the code will populate in this field. You can also manually enter chartfields as required.

Click: OK.

Expected Results: Correct data entry. Return to MSR.
Step 5. Click: [Save] to save.

Note: If you want to print a copy of the Issue as a receipt, you can click on the icon, which will create a pdf report in your report manager.

Expected Results: MSR saves correctly.

End of Exercise.
Exercise 4: Inquiring on MSR

Scenario: Having not received your goods the following day you want to inquire on the MSR you raised to see what status it is in.

Step 1. To access Stock Requests, Navigate to Inventory, Fulfil Stock Orders, Review Fulfillment Information, Stock Requests

Enter or select the following:

Unit: RSC

Expected Results: Stock Request Inquiry Selection displays.
Step 2. Enter or select the following:

**Item ID:** (refer to instructor)

**Note:** If you want to search by MSR number, simply enter the MSR into the order number field.

Click:  

**Expected Results:** Correct data entry.
Step 3.

You can now review the status of the order.

Expected Results:

Correct navigation.

End of Exercise.