How to Conduct and Log Inventories

This guide applies to Aircraft, Communications Gear, Equipment and Supplies, and Vehicles. Where there are differences, they will be noted.

IMPORTANT NOTE: MAKE SURE TRANSFERS OR ISSUES HAVE BEEN COMPLETED IN ORMS OR YOU WILL **NOT** BE ABLE TO ENTER YOUR INVENTORY!

This guide presumes you know how to get into ORMS. If you do not, contact your mentor or commander.

1. Generating the Inventory Worksheet.

      The Inventory Worksheet is a report found in ORMS. It will list all the appropriate inventory items for the type you select.

- In ORMS, click on "Reports" under the "Reports" section on the left column.

- Select the module you are conducting the inventory for:

      For this guide, we will be generating the "Equipment" report for wing.

- Select the "Supplies and Equipment Inventory Worksheet", your organization (if not pre-selected), check the "View Unit Only" box for Group or higher units. If you don't your report will list everything in your unit and all your subordinate units. Select the format (PDF, Word doc, or Excel spreadsheet). The default ins PDF, which works fine.

When everything is selected, click "Submit".

- Print out the report and physically check everything. Record the status on the worksheet as you go. You can do this over multiple days, if necessary.
  - S – Serviceable (ready to use, may need to be plugged in)
  - SNR – Serviceable, Needs repair (Can be used after repair, i.e. radio missing a knob)
  - U – Unserviceable (unusable or uneconomical to repair. Needs to be retired)
  - M – Missing or Damaged (If you can't find it, it's missing. Selecting this initiates the Report of Survey process)
- Everything means EVERYTHING. Equipment that is issued to members must be checked.
  - Physically checking is preferred
  - Proof of Life can be used if equipment is installed at a member's home, such as an HF radio
  - Serviceable means you've tested it and the equipment works.
    - This specifically includes radios. The Communications staff has found a significant percentage of radios listed as "Serviceable" that did not work.

Completing the Inventory in ORMS.

- After filling out your Inventory Worksheet, go into ORMS and select "Conduct Inventory" under the appropriate section.

- Select your unit from the drop down, if not already selected.

- You will get a pop-up dialog box to remind you to complete your inventory worksheet. Once you check the status of an item and submit it, you cannot change the status until the entire inventory is complete.

- After clicking "OK", enter the type of inventory you are completing -
  ○ Annual – your big inventory, done once a year. Everything assigned to your unit needs to be checked.
  ○ Changeover – conducted when there is a change of command or change of Logistics, Communications, or Supply Officers.

- The Inventory list will come up.

It will tell you how many items you have to inventory.

- You will need to select the "Condition" from the drop down list for each item.
  - Serviceable
  - Needs Repair
  - Unserviceable
  - Missing/Damaged
- You can also change the location on this screen.
- When you've finished changing the condition and checking the "Verified" box for all items you are entering at this time, click on the "Update Inventory" button at the top or bottom.
- Once you update the inventory for an item, you cannot change the status of that item until you've completed inventorying everything on the list.
- Once you've updated everything, you'll get a pop-up asking you to certify the inventory is correct. Once you click OK, ORMS will log your inventory as completed.
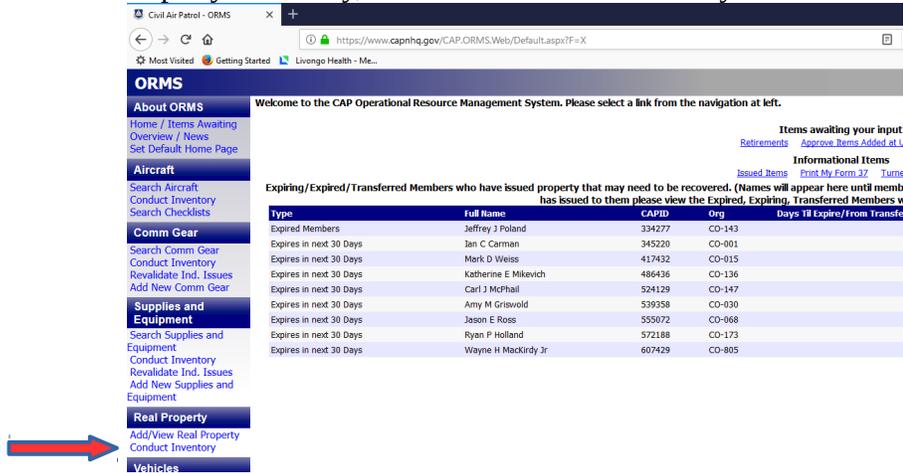
Congratulations! You're done!

ORMS will automatically complete inventories that do not apply to units. For example, if your unit does not have a vehicle assigned to it, ORMS will show "Annual Inventory completed by Inventory Completion Script on 01 Oct 2018", if you try to complete an inventory that you no items in.

Repeat process for Communications Gear, Supplies and Equipment, Vehicles, and Aircraft. Real Property is the next section.

Inventorying Real Property.

For Real Property, there is no Inventory Worksheet. Instead, there is a "Real Property Report". This report lists the Real Property your unit has listed in ORMS.

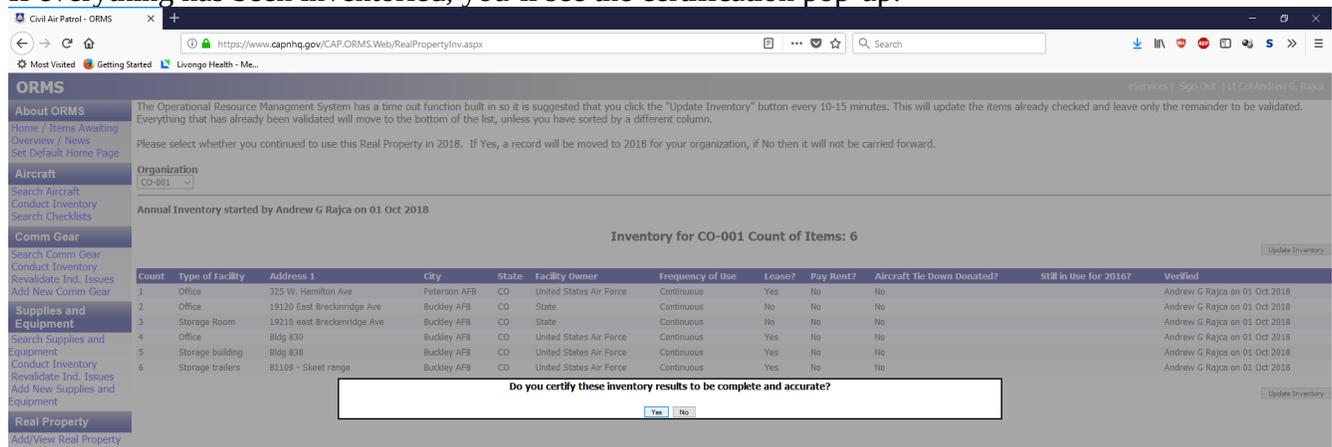To conduct the Real Property Inventory, click on "Conduct Inventory" under Real Property.

Select your organization, if not already selected.

Under "Still in Use for 2016", check "Yes" or "No". When finished, check "Verified", then click "Update Inventory".

If everything has been inventoried, you'll see the certification pop-up:

Click "Yes" and ORMS will log your inventory as completed.

The author does not know why National has not updated the Still In Use header, but it saves the information for 2018, not 2016.