

## **NEW!! 2011 ANNUAL INVENTORY INSTRUCTIONS**

To ensure good stewardship of all its property resources CAP has established the 1 January through 31 March as the annual inventory period for the accounting of all CAP property. Possession or proper accounting for every item on your unit's ORMS inventory, including aircraft, vehicles, communications items and all supplies and equipment, must be certified in ORMS during the annual inventory.

To eliminate problems encountered during last year's annual inventory several minor changes have been implemented in the ORMS Annual Inventory module. Primarily, all validations and physical counts must now take place before units attempt to open the inventory module in ORMS or attempt to enter the appropriate data. If the instructions below are carefully followed, the period when transactions are locked will be minimal.

### **WARNING**

**FOR THE ORMS ANNUAL INVENTORY FUNCTION TO WORK CORRECTLY YOU MUST FIRST COMPLETE YOUR PHYSICAL COUNT, AND ALL TRANSFERS AND INDIVIDUAL ISSUE VALIDATIONS BEFORE CLICKING THE "CONDUCT INVENTORY" BUTTON IN THE DIFFERENT PROPERTY MODULES.**

Once you have clicked Conduct Inventory you will not be able to initiate any transfers, retirements, or issuances until your unit's entire inventory results have been recorded. ORMS was constructed this way to insure clear accountability of all items by making sure they are counted and not stuck in a transitory status during the inventory.

- **CAP Regulation 174-1, paragraph contains policies regarding the annual inventory.**

**2-16. Annual Physical Inventory.** Perform annual inventories to ensure property is safeguarded and managed effectively for use in CAP missions. Scheduled inventories are a requirement of the DoDGARs. Results of all inventories shall be recorded in ORMS. Selecting a condition of missing/damaged will automatically generate a requirement for a report of survey in ORMS. Use the checklist provided in ORMS to conduct the annual inventory.

**a.** During the inventory, unit commanders, supply or communications officers shall verify in ORMS the condition, location and requirement for retention of property. Off-site property must also be checked during annual inventory. Remote functional checks are acceptable to verify condition and presence of off-site equipment. During the inventory all non-expendable property that has been issued to an individual must be presented to a property officer for validation of possession and condition. Commanders are responsible for determining appropriate verification procedures for property that that cannot be transported and presented for inventory..

**b.** Conduct the annual inventory during the 1 January to 31 March period. Inventories are complete when all individual issues have been revalidated and conditions and locations of all un-issued items have been verified.

**c.** Units failing to complete their annual inventory during this period shall be placed on Property Freeze. Wings are also subject to Property Freeze if a significant number of subordinate unit physical inventories are delayed beyond 31 March.

**d.** To accomplish the physical inventory, complete the following tasks:

**(1)** Complete all pending issues, transfers and retirements.

**(2)** Using the ORMS annual inventory worksheet, perform a 100% "eyes on" check to determine the presence, condition and data accuracy of each item on the unit's property list.

**(3)** Check condition of all non-expendable property. Indicate condition as "missing/damaged", "serviceable," "needs repair" or "Unserviceable".

**(4)** Ensure all non-expendable items on hand are properly tagged and are reflected accurately in ORMS. Replace missing property tags where required. Update ORMS if new property tag numbers are assigned.

**(5)** Make note of items that cannot be located and record them as "missing/damaged" in the "condition" field in ORMS.

**(6)** Any non-expendable property discovered during the annual inventory shall be researched to determine its source before loading in ORMS.

**(7)** ORMS will not permit completion of the annual inventory until all issued property has been validated in ORMS.

**(8)** Off-site property condition and location must be validated during annual inventory.

**(9)** When all counts are complete, all issued property has been validated, and Reports of Survey for all missing or damaged property have been initiated, property management officers will log into ORMS and certify the inventory results. Commanders must also acknowledge completion of the annual inventory after property management officers have completed the inventory.

**(10)** On-loan property must be physically checked during the annual inventory.

## CAP ANNUAL INVENTORY PROCESS

STEP1 - COMPLETE UNIT'S IN-PROGRESS TRANSACTIONS. (Do not click "Conduct Inventory" at this point.) Inventory takers should first make sure all in-progress individual issuances and transfers have been completed. The annual inventory will not let you proceed if there are any pending transfer or issue transactions. Property managers may need to contact the receiving party to let them know that action in ORMS is required on their part. Look in the Reports Module under each property type (aircraft, vehicle, etc.) for the unit's "Items with a Pending Status" and "Pending Transfers" reports to see which incomplete transactions need to be resolved before beginning your physical inventory. In-progress Reports of Survey will not impede completion of the annual inventory. Items for which the retirement process has been initiated will need to be counted during the inventory. Any items in wing-000 accounts should be transferred to wing-001 or other unit accounts before commencing the inventory.

<b>Vehicles</b>
<a href="#">Vehicle Search</a>
<a href="#">Conduct Inventory</a>
<a href="#">Add New Vehicle</a>
<b>Other Property</b>
<a href="#">Expendable Property</a>
<b>Reports</b>
<a href="#">Reports</a>
<b>Documentation</b>
<a href="#">Documentation</a>
<a href="#">Printable Forms</a>

**ORMS - Reports** e-Services

**About ORMS**  
Home  
Overview / News  
Administration  
Logistics Freeze

**Aircraft**  
Search Aircraft  
Conduct Inventory  
Add New Aircraft

**Comm Gear**  
Search Comm Gear  
Conduct Inventory  
Revalidate Ind. Issues  
Add New Comm Gear

**Supplies and Equipment**  
Search Supplies and Equipment  
Conduct Inventory  
Revalidate Ind. Issues  
Add New Supplies and Equipment

**Real Property**  
Temp. Unavailable

**\*Select Module**  
Communications Gear

**\*Organization**  
AK-001  View Unit Only

**\*Select Report**  
Items with a Pending Status

**\*Select Format**  
 PDF  Word  Excel

**Comm Gear Reports**

Comm Gear Inventory Worksheet - Shows all Comm Gear items for the selected Organization and where it stands in the current inventory.

Individual Issue Validations Progress by Member's Organization - Shows all Members from the selected Organizatin that have Comm Gear items issued to them and when they will need to do the next revalidation.

Individual Issue Validations Progress by Item's Organization - Shows all Comm Gear items from the selected Organizatin that are issued and when they will need to be revalidated next.

Transaction Log - Shows all ORMS Comm Gear transactions for the selected Organization between the Start Date and End Date.

**Items with a Pending Status** - Shows all Comm Gear items for the selected Organization that are Issue Pending, in Need of Review (from CATS) or Pending Deletion (from cems).

Pending Retirement Approval Status - Shows all Pending Comm Gear Retirements for the selected Organization and where it is in the retirement approval process.

**Pending Transfers** - Shows all Pending Comm Gear Transfers for the selected Organization and who can approve/accept them.

STEP 2 - VALIDATE INDIVIDUAL ISSUES. (*Do not click "Conduct Inventory" at this point.*) The next step in the annual inventory process is to validate all property that has been issued to individuals. Select "Revalidate Ind. Issues" in the appropriate module (Communications or Supplies and Equipment) to validate each issued item in a member's possession. Do not begin annual individual validations until 1 January.

Any individual with issued property must have all their items validated by a squadron, group, wing or region property officer. Communications officers, logistics officers, supply officers, commanders and deputy commanders have been issued permissions in ORMS to perform individual issue validations. Members who are not property management officers must bring their property to a commander or property management officer for validation.

The best way to see all the issued property in your inventory is to use the "Individual Issue and Validations Progress by Member's Organization" or "Individual Issue Validations Progress by Item's Organization" reports found in the Reports module.

You may also list all issued property via a search in the appropriate module. First, select the unit and check the "View Unit Only" box. Then check the "Issued" box and hit Submit to list all the items in your unit that are issued to individuals. This feature is useful to determine at a glance all those you may need to contact to arrange their property validation. You may also use this screen to see all the property issued to a single individual by entering their CAPID or name in the "Search for Items Issued to" section at the bottom. This method is also useful for producing a spreadsheet that you can sort to meet your requirements.



## ORMS - Comm Gear - Search

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<div style="background-color: #003366; color: white; padding: 2px; font-weight: bold; margin-bottom: 5px;">About ORMS</div> <ul style="list-style-type: none"> <li><a href="#">Home</a></li> <li><a href="#">Overview / News Administration</a></li> <li><a href="#">Logistics Freeze</a></li> </ul> <div style="background-color: #003366; color: white; padding: 2px; font-weight: bold; margin-bottom: 5px;">Aircraft</div> <ul style="list-style-type: none"> <li><a href="#">Search Aircraft</a></li> <li><a href="#">Conduct Inventory</a></li> <li><a href="#">Add New Aircraft</a></li> </ul> <div style="background-color: #003366; color: white; padding: 2px; font-weight: bold; margin-bottom: 5px;">Comm Gear</div> <ul style="list-style-type: none"> <li><a href="#">Search Comm Gear</a></li> <li><a href="#">Conduct Inventory</a></li> <li><a href="#">Revalidate Ind. Issues</a></li> <li><a href="#">Add New Comm Gear</a></li> </ul> <div style="background-color: #003366; color: white; padding: 2px; font-weight: bold; margin-bottom: 5px;">Supplies and Equipment</div> <ul style="list-style-type: none"> <li><a href="#">Search Supplies and Equipment</a></li> <li><a href="#">Conduct Inventory</a></li> <li><a href="#">Revalidate Ind. Issues</a></li> <li><a href="#">Add New Supplies and Equipment</a></li> </ul> <div style="background-color: #003366; color: white; padding: 2px; font-weight: bold; margin-bottom: 5px;">Real Property</div>	<div style="text-align: right; font-weight: bold; margin-bottom: 10px;">Search Criteria</div> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p><b>*Organization</b> <span style="color: red;">↗</span>  <span style="background-color: yellow;">AK-001</span> <span style="color: red;">↗</span> <input checked="" type="checkbox"/> <span style="background-color: yellow;">View Unit Only</span></p> <p><b>Noun</b>  --Select--</p> <p><b>Source</b>  --Select--</p> <p><b>Acquisition Cost (&gt;=)</b>  <input type="text"/></p> <p><b>Stock Class</b>  --Select--</p> <p><b>NSN</b>  <input type="text"/></p> <p><b>Remarks</b>  <input type="text"/></p> <p style="font-size: small; background-color: yellow; margin-top: 10px;"><b>Search for Items Issued to:</b>  Enter all or part of a CAPID or name and click the search button.</p> <input type="text"/> </div> <div style="width: 45%;"> <p><b>Serial Number</b>  <input type="text"/></p> <p><b>Make</b>  --Select--</p> <p><b>Location</b>  <input type="text"/></p> <p><b>Acquisition Date</b>  <input type="text"/></p> <p><b>Condition</b>  --Select--</p> <p><input checked="" type="checkbox"/> <span style="background-color: yellow;">Issued?</span> <input type="checkbox"/> Encryption Loaded?</p> <p><input type="checkbox"/> Assigned to Aircraft, Vehicle, or Kit?</p> </div> <div style="width: 45%;"> <p><b>PCN</b>  <input type="text"/></p> <p><b>Model</b>  <input type="text"/></p> <p><b>Old CEMS RecordID</b>  <input type="text"/></p> <p><b>Description</b>  <input type="text"/></p> <p><b>Property Tag</b>  <input type="text"/></p> <p><b>Purchase Order #</b>  <input type="text"/></p> <p><b>Search In</b>  <input checked="" type="radio"/> Active <input type="radio"/> Retired</p> </div> </div> <div style="text-align: right; margin-top: 10px;"> <input type="button" value="Search"/> <input type="button" value="Reset"/> </div>
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STEP 3 - CONDUCT PHYSICAL COUNT. (*Do not click "Conduct Inventory" at this point.*) Next, you should complete your physical count. The best way to accomplish this is to print the Inventory Worksheet from the Reports module and write the results of your physical count on it. Only after you have completed this should you open the inventory record.

The screenshot shows the ORMS - Reports interface. On the left is a navigation menu with sections: About ORMS (Home, Overview / News, Administration, Logistics Freeze), Aircraft (Search Aircraft, Conduct Inventory, Add New Aircraft), and Comm Gear (Search Comm Gear). The main content area has four sections with red arrows pointing to specific elements:
 

- \*Select Module:** A dropdown menu with 'Communications Gear' selected.
- \*Select Report:** A dropdown menu with 'Comm Gear Inventory Worksheet' selected.
- \*Organization:** A dropdown menu with 'AK-001' selected and a checked checkbox for 'View Unit Only'.
- \*Select Format:** Radio buttons for 'PDF' (selected), 'Word', and 'Excel', with a 'Submit' button below.

Use the inventory worksheet to make a temporary written record of the locations and condition of your unit's items. You will need to enter this info into ORMS when you record your inventory count results in ORMS.

The screenshot shows the 'S8 - Comm Gear Inventory Worksheet' with the following data:

Total Comm Gear - 3  
This report prints at 8.5" x 14"

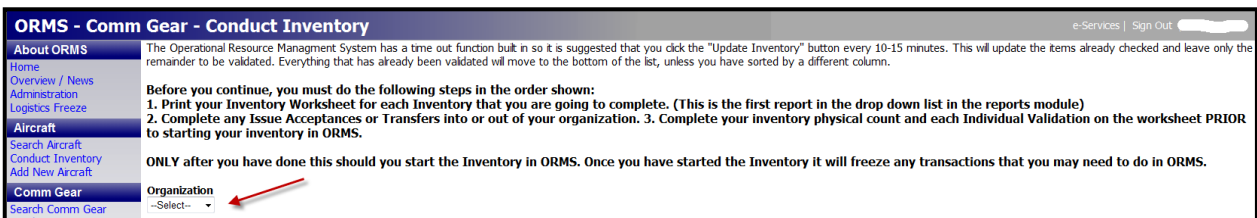
Count	Noun	Make	Model	Property Tag	SerialNumber	Location	IssuedTo	S	SNR	U	M
1	Power Supply	Astron	SL-15R-EFJ	CAP2030574 Old cemsID	205070194	39 Ti	WAREHOUSE	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Mobile Radio-VHF	EF Johnson	STEALTH 5317	CAP2026940 Old cemsID	5317H4605T37156	39 Ti	CJ	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Mobile Radio-UHF	Tait	2020	914733 Old cemsID: 0	17045652	39 Ti	CJ	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

STEP 4 - RECORD PHYSICAL COUNT RESULTS. (**Now** click “Conduct Inventory”!) You are ready to record your results in ORMS in the appropriate property module. Once the Inventory Record has been opened, record the results from your inventory worksheet. Remember, once the inventory record is open you will be unable to transfer or issue any property until you have submitted the inventory.

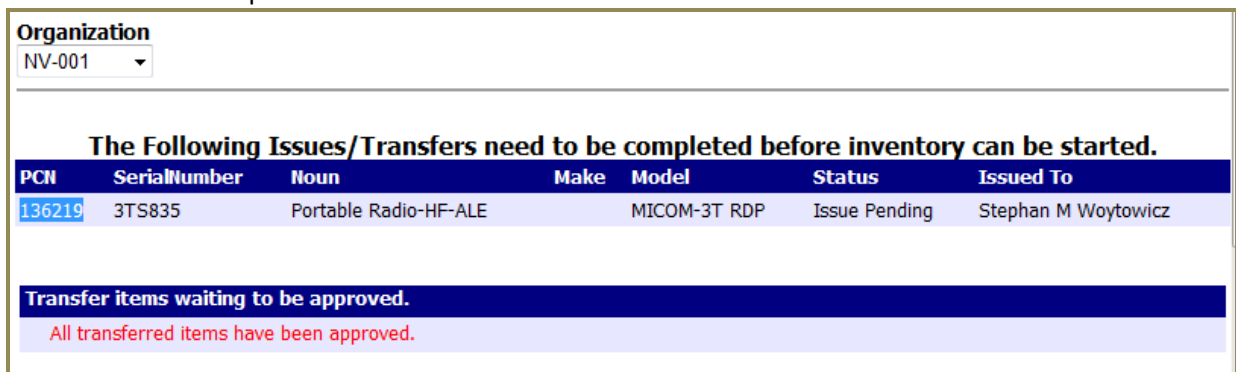
a. Select “Conduct Inventory” under the module you wish to record.



b. Select your unit from the dropdown list:



c. If you still have any pending transactions you will not be allowed to proceed until the transaction has been completed. A notice like the one below will appear letting you know which transaction needs to be completed.



d. Once you have no pending transfers or individual issues the system will remind you that when you continue the inventory process you will not be able to conduct any other transactions until the inventory results have been recorded and submitted. If you have completed all the steps above click “OK” and select “Annual Inventory”.

**Comm Gear - Conduct Inventory** e-Services | Sign Out | J

The Operational Resource Management System has a time out function built in so it is suggested that you click and leave only the remainder of the list, unless you have sorted the list differently.

**Before you start your inventory, please complete the Inventory Worksheet.**

1. Print the Inventory Worksheet  
 2. Complete the Inventory Worksheet  
 3. Complete the Inventory Worksheet

**ONLY Inventory it will freeze any transactions that you may need to do in ORMS.**

Organization: NY-043

Inventory Type:  Annual  Changeover

**BEFORE** you continue with the inventory, please make sure you have completed the Inventory Worksheet.

Once inventory is started in ORMS, transactions will be locked for these items.

**OK**

- e. You are now ready to record the results of your physical count in ORMS. Update the location field for each item that differs from your inventory worksheet location note. Enter the condition of the item remembering that selecting the "Missing/damaged" entry will automatically initiate a Report of Survey for that item. When the location and condition entries are done, click the box next to the item in the Verified column and move on to your next entry. When you have finished your entries click Update Inventory. You do not have to make all your entries in a single sitting. Clicking Update Inventory will save and hold all your entries until you are able to return. Please understand however that you will not be able to conduct any ORMS transactions until you have finished all your entries and submitted the inventory.

**Annual Inventory started by Jo**

Inventory for  Count of Items: 16

**Update Inventory**

Count	Noun	Make	Model	Serial Number	Property Tag	Issued To/Assigned To	Location (ICAO)	Condition	Verified
1	Base Station-HF	Motorola	MICOM-2	856SXC1668	CAP1002067 Old	cemsID: 904536	Cmdr Residence	--Select--	<input checked="" type="checkbox"/>
2	Power Supply	Astron	SS-30	98112596	CAP2004142 Old	cemsID: 911108	Cmdr Residence	--Select-- Serviceable Needs Repair	<input type="checkbox"/>
3	Mobile Radio-VHF	EF Johnson	STEALTH 5317	5317MD260A50586	CAP2004736 Old	cemsID: 915052	Cmdr Residence	Unserviceable Missing/Damage	<input type="checkbox"/>

**RECOMMENDATION:** As a web security measure, eServices (and all its applications including ORMS) has a built-in time-out function to deter hackers. When conducting an annual or changeover inventory **we strongly recommend that you click the "Update Inventory" button at least every 10-15 minutes** to prevent losing your work and having to re-accomplish your entries. Doing this will update the items already checked and leave only the remainder to be validated.

Everything that has already been validated will move to the bottom of the list, unless you have sorted by a different column.

- f. If you need to re-start your inventory you may select the Reset Inventory button. Doing this will erase all your entries but will permit you to conduct transactions if you absolutely must.

Feeds provide updated website content  
e-Service | Sign Out | Primary Dept

## Comm Gear - Conduct Inventory

The Operational Resource Management System has a time out function built in so it is suggested that you click the "Update Inventory" button every 10-15 minutes. This will update the items already checked and leave only the remainder to be validated. Everything that has already been validated will move to the bottom of the list, unless you have sorted by a different column.

**Before you continue, please make sure that you have done the following:**

1. Print your Inventory Worksheet for each Inventory that you are going to completed. (This is the first report in the drop down list in the reports module)
2. Complete your inventory and each Individual Validation on the worksheet PRIOR to starting your inventory in ORMS.
3. Complete any Issue Acceptances or Transfers into or out of your organization.

**ONLY after you have done this should you start the Inventory in ORMS. Once you have started the Inventory it will freeze any transactions that you may need to do in ORMS.**

Organization

Reset Inventory

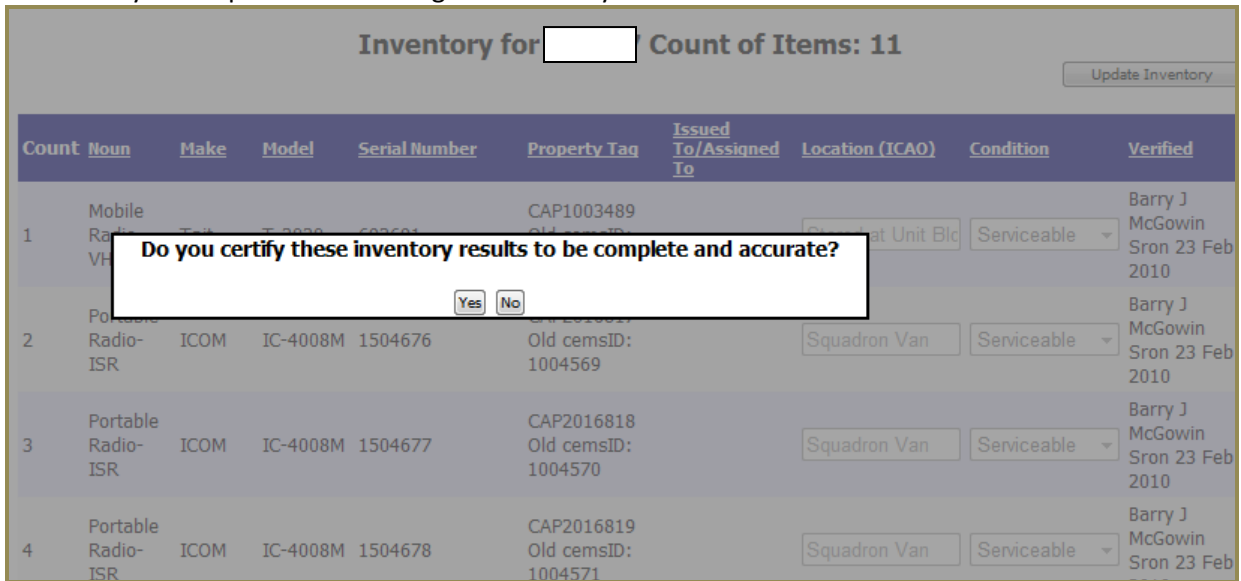
- g. Items that have been previously verified or validated will have their Location and Condition fields grayed out and will not require an entry. The name of the individual who verified the item will also be displayed. Items that have already been reported as missing or damaged will also be grayed out since the Report of Survey for that item is already underway.

Annual Inventory started by Jo

**Inventory for**  **Count of Items: 90**

Count	Noun	Make	Model	Serial Number	Property Tag	Issued To/Assigned To	Location (ICAO)	Condition	Verified
1	Base Station-HF	Motorola	MICOM-2	856SXC1633	CAP1001043 Old cemsID: 904526		MEG Comm.	Needs Repai	Donald W on 13 Mar 2010

- h. When you have made your last entry hit Update Inventory. At this point the system will ask you to confirm that your entries are accurate and complete. Selecting Yes will record the date, time and identity of the person submitting the inventory.



- i. The Annual Inventory Status Report will reflect the date and time you submitted your unit's inventory.

**All unit annual inventories must be completed between January 1 and March 31.**

Please use the eServices Help Desk to submit any questions you may have about these instructions.