Contract Supplier Manual

Contract Supplier Manual

Sandia National Laboratories
Procurement
Dept. 10223

Internet Procurement
July 2005

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CONTACT PHONE NUMBERS
(For CONTRACT SUPPLIERS)

JIT CONTRACT ADMINISTRATORS

Delilah Armijo	dvigil@sandia.gov	284-4637
Cathy Benavidez	cjbenav@sandia.gov	844-3857
Judy Jojola	jajojol@sandia.gov	284-2893
Tomas Martinez	tdmarti@sandia.gov	284-4348

JIT CONTRACT REPRESENTATIVES

Jennifer Coots	jjcoots@sandia.gov	284-5606
Dolores Gonzales-Limon	dgonzal@sandia.gov	844-3015
Angel Martinez	aamart@sandia.gov	844-5508
Jeff Miller	jmiller@sandia.gov	844-9195
Jeanne Wallace	jpwalla@sandia.gov	844-7355

CATALOG ADMINSTRATOR

E-Mail Address	catalogs@sandia.gov

RECEIVING DEPARTMENT

Email Address	jitdown@sandia.gov
Receiving Help Desk (NM)	844-1448
Receiving Help Desk (CA)	(925) 294-2881

JIT DEPARTMENT FAX	844-1151
PROCUREMENT HELP DESK	284-4743
ACCOUNTS PAYABLE HELP LINE	845-2455
PASSWORD CONTROL	844-6595
HARDWARE/COMPUTER SUPPORT-HOLMANS	343-3505

GENERAL INFORMATION

AUTHORIZED USERS OF JUST-IN-TIME (JIT)

Sandia employees are authorized to purchase items from JIT suppliers. Sandia Contractors are authorized to request items from JIT suppliers but their orders must be routed to a Sandia Manager for approval. See Section 2.0.14 of this manual for instruction on routing orders for approval.

UPDATING CATALOG CONTENT

Contract Suppliers should submit files to catalogs@sandia.gov as defined by contract terms.

DELIVERY WINDOWS

Each Contract Supplier delivering to Bldg. 957 is assigned a 'delivery window'. Contact your SCA or SCR if you are unsure of your window or if your assigned 'window' isn't working for you. Please stay within your assigned window.

PACKING SLIPS

Packing slips are strongly recommended by SNL and are very useful to Requesters

PACKAGING MULTIPLE ITEMS FOR ONE REQUESTER

It is possible for a supplier to package multiple items for one Requester in the same box, as long as the destination location is identical.

FINDING SNL EMPLOYEE INFORMATION

SNL employee information can be obtained at: http://www.sandia.gov/Contacting.htm. While entering requisitions, should you be unable to pull up the customer's delivery location (it's not loaded in Oracle), contact the Procurement Help Desk at 284-4743 to get this delivery location loaded into Oracle.

FINDING STATUS ON ORDERS

Purchase order, delivery, receipt, invoice, and payment status can be found through Internet Procurement.

Note: If your company does not currently have a web supplier account, the application at the end of this section may be completed and submitted to SNL for access approval, or you may obtain a copy from your SCA.

PRICE REVIEWS

Price Reviews will continue annually. Suppliers are responsible for maintaining all documentation regarding price changes.

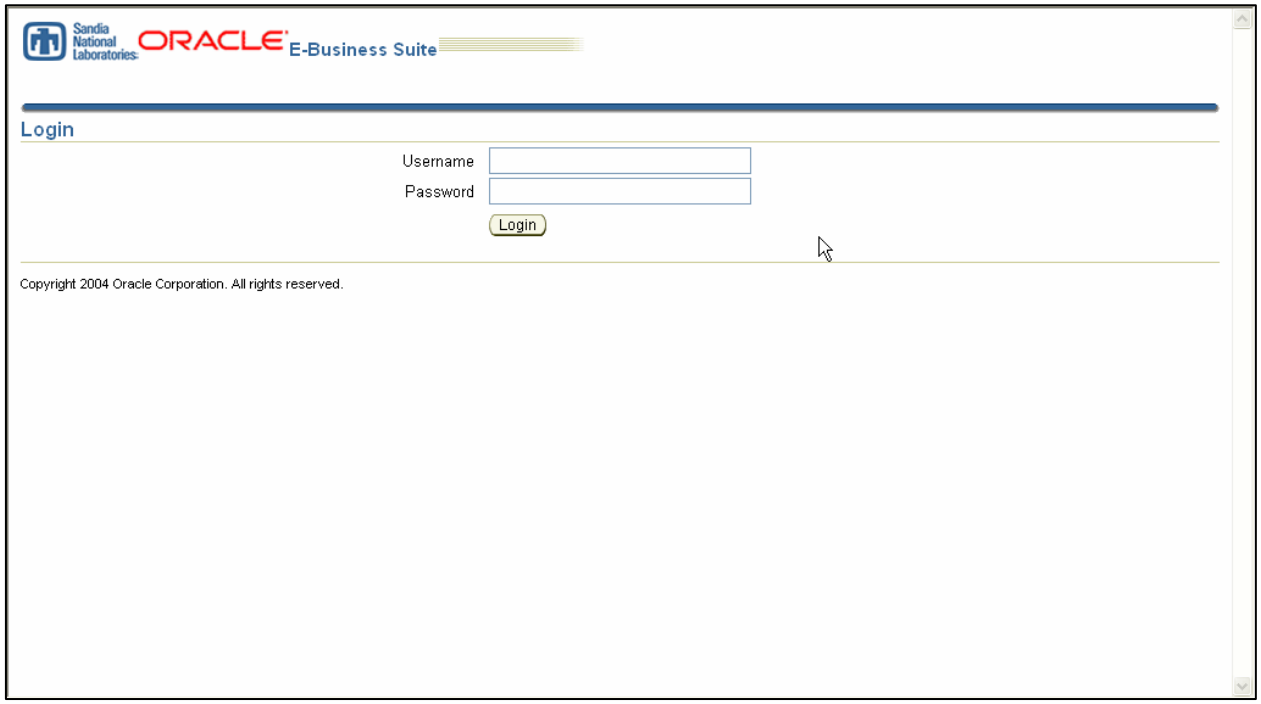
JIT REPORTS

Service Level Reports will continue to be distributed on a Monthly basis.

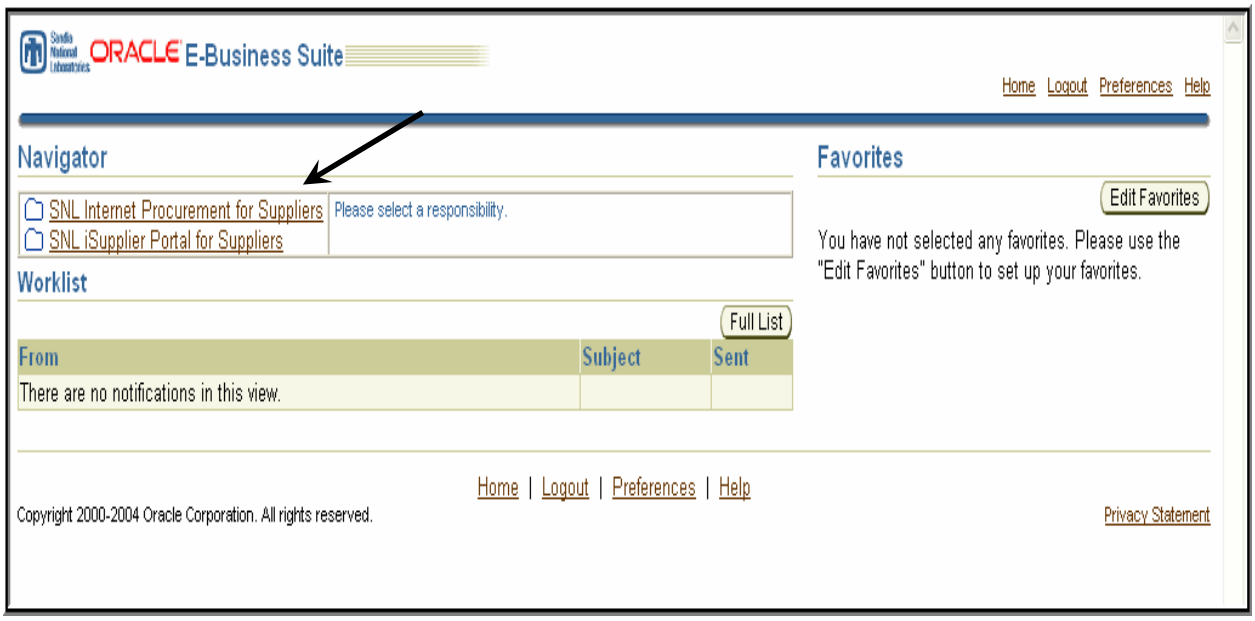
ORDERING LABELS
Order Avery smudge free printing labels #8164.

Placing Catalog Orders

Oracle can be accessed by using the following web-based URL:
https://oracleapps.sandia.gov:8807/oa_servlets/AppsLogin



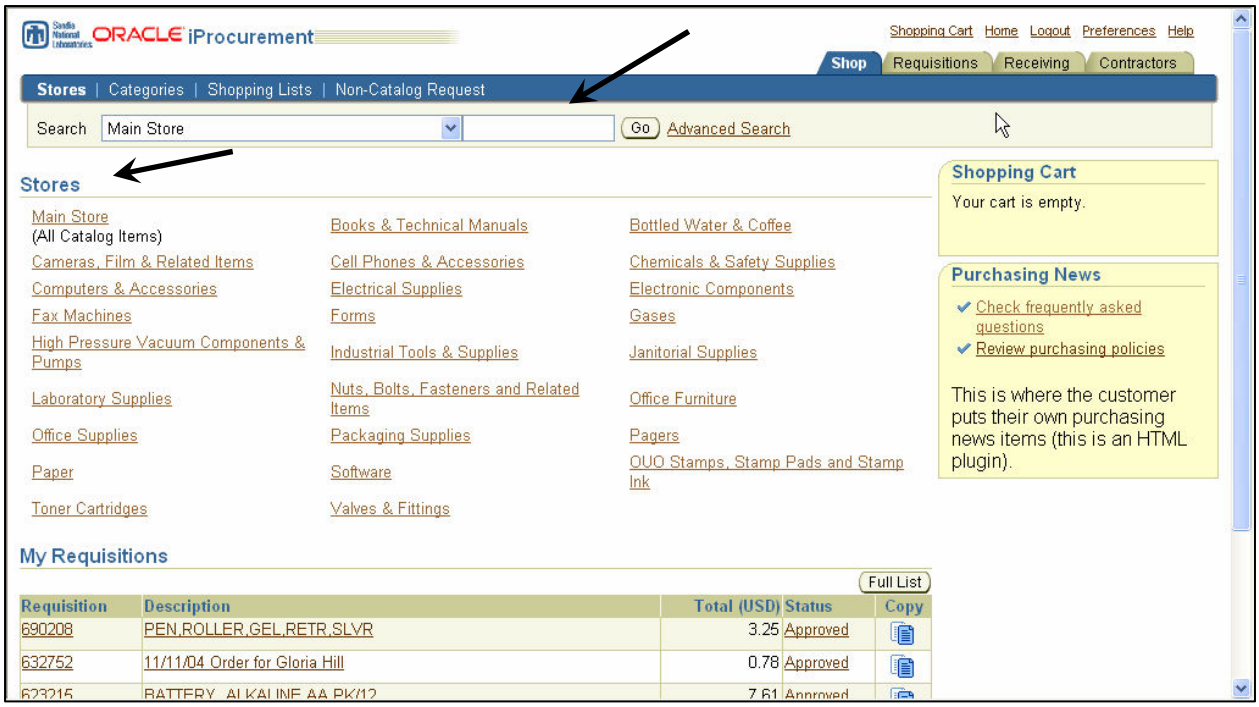
1. Enter your **Username** and **Password** in the given fields.
2. Click **Login** button.



Each supplier has two application responsibilities.

To *enter orders* – select **SNL Internet Procurement for Suppliers.**

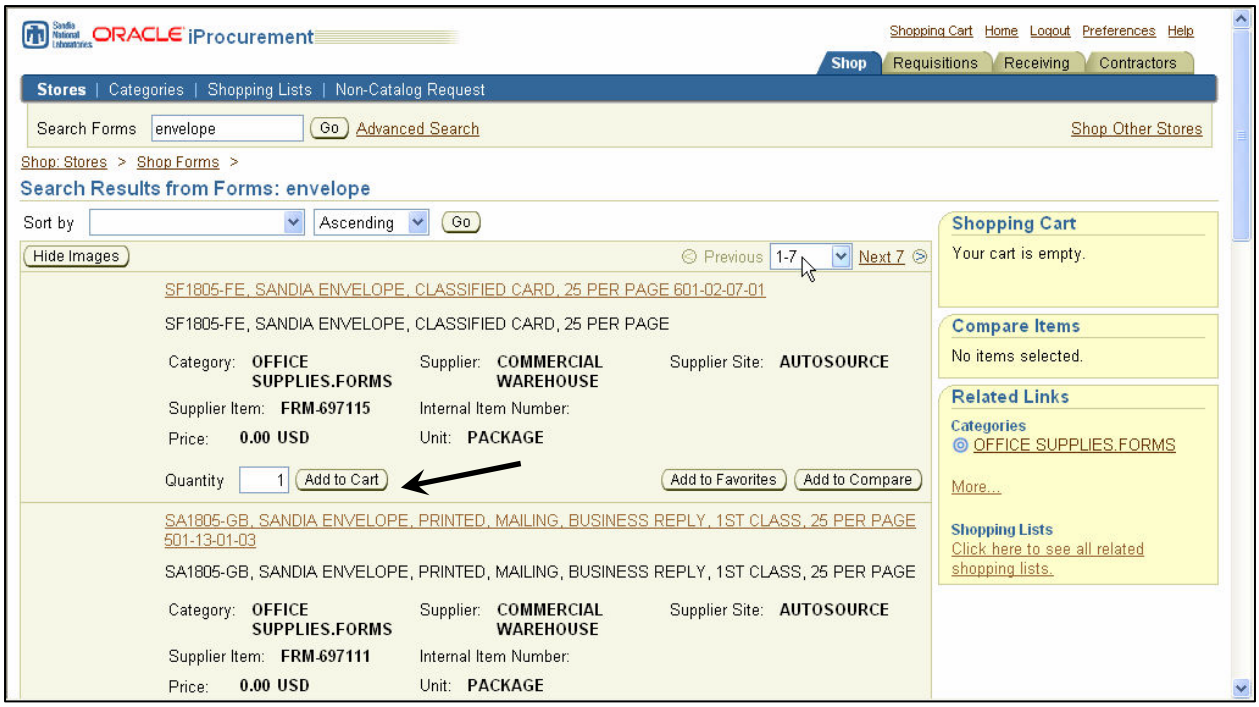
To *download/export orders and create Advanced Shipment Notice (ASN)* – select **SNL iSupplier Portal for Suppliers.**



To place a Catalog Order: (SNL Internet Procurement for Supplies>Home Page)

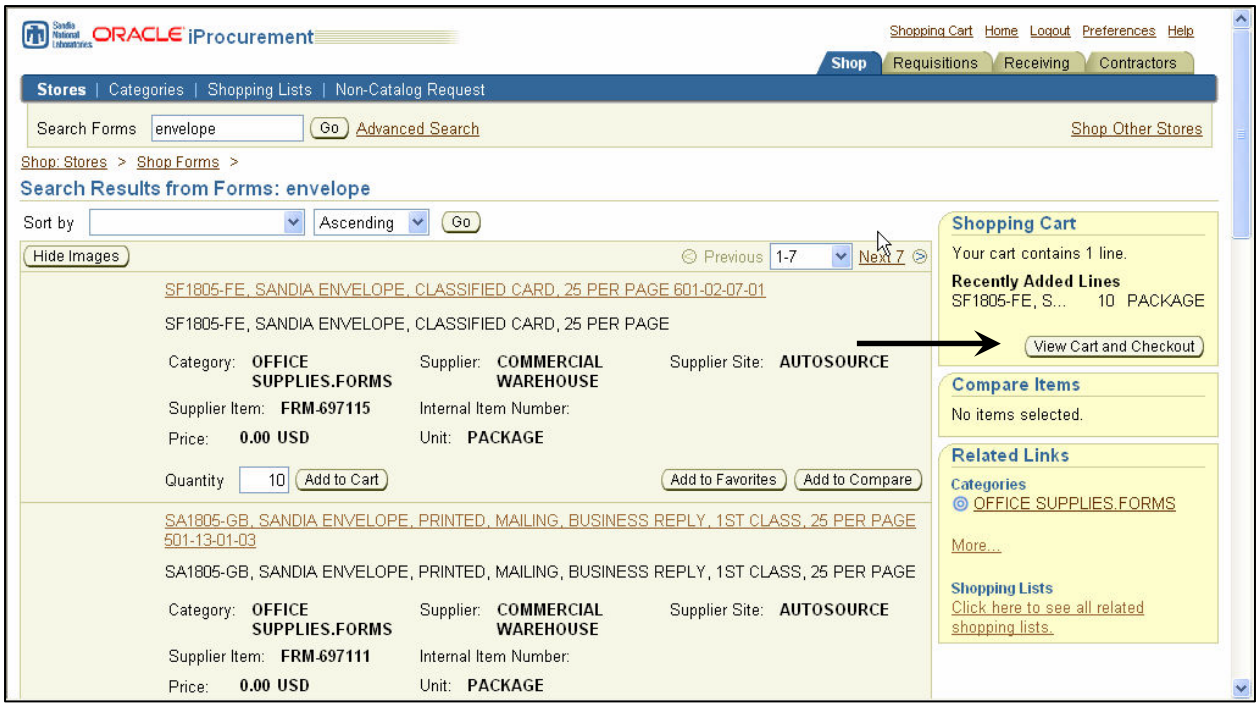
SNL Internet Procurement is set up with different stores. If your company has a store set up, click on the store name and then enter search criteria in search field.

1. Enter search criteria in **Search** field (Search can be by name, part number, category, etc).
2. Click **Go** button.



Results will be displayed.

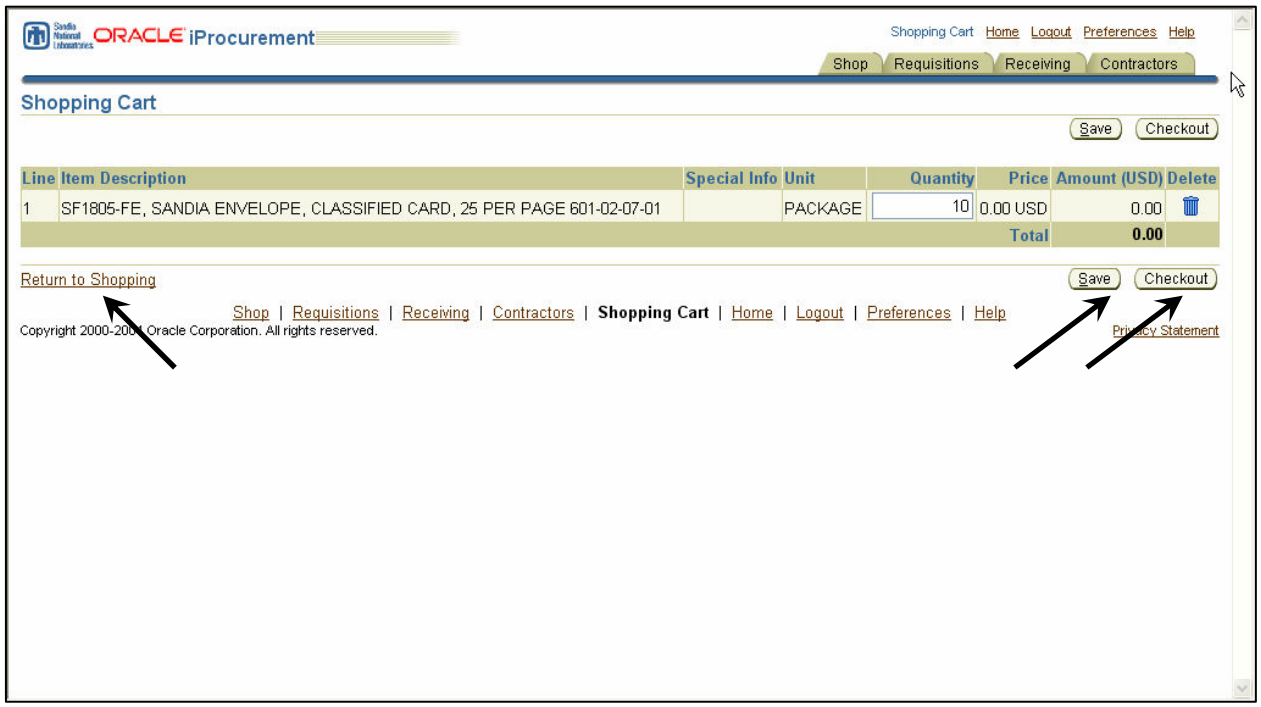
1. Change **Quantity** if more than one (1) is needed (system defaults to 1).
2. Click **Add to Cart** (You have the option to **Add to Favorites** and/or **Add to Compare** 1 product to another)



Your Shopping Cart Contents will be displayed to the right of screen.

When you are done shopping and ready to checkout:

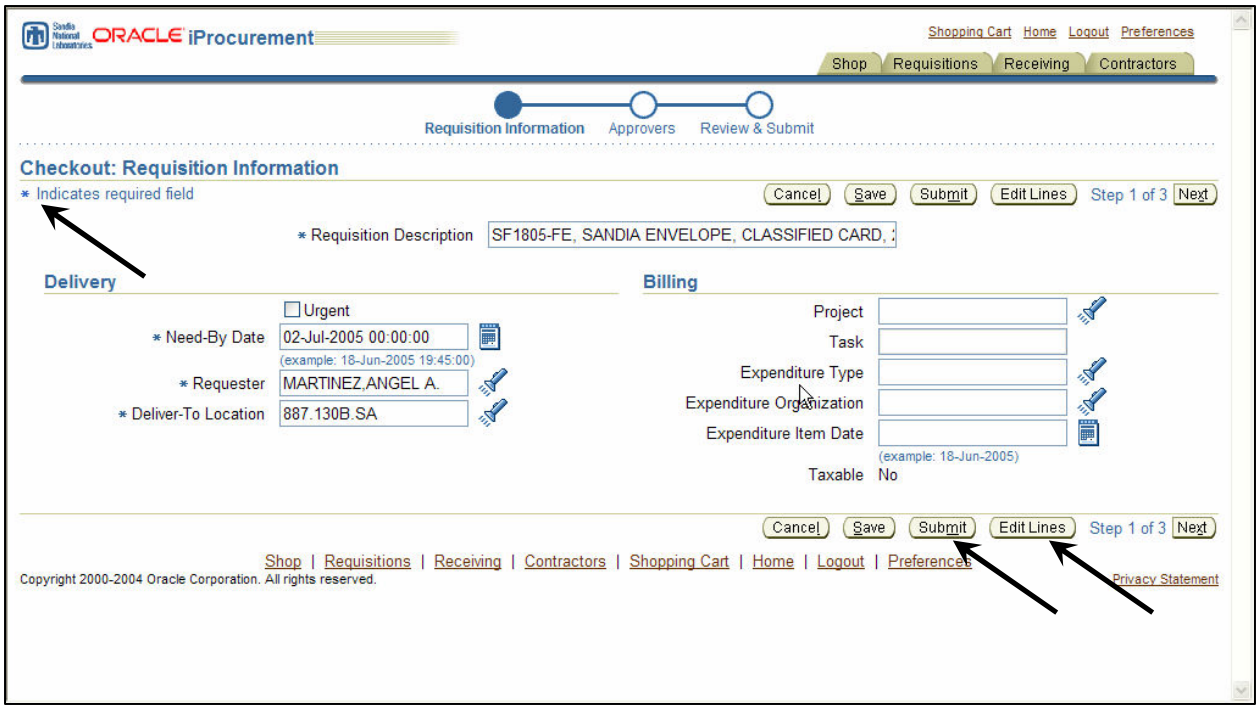
1. Click on **View Cart and Checkout**.



Your shopping cart content(s) will be displayed.

1. You have the option of changing the **Quantity**.
2. Select one of the following options:
    a. **Return to Shopping** (if you need to order other items)
    b. **Save** (To save items in your cart and complete the checkout process at a later time)
    c. **Checkout** (Step-by-Step checkout)

Note: Contract Suppliers will typically "Checkout"



Note: * indicates a required field. Some of the fields in this view auto populate, such as the Requester, Expenditure Type, and Expenditure Org.

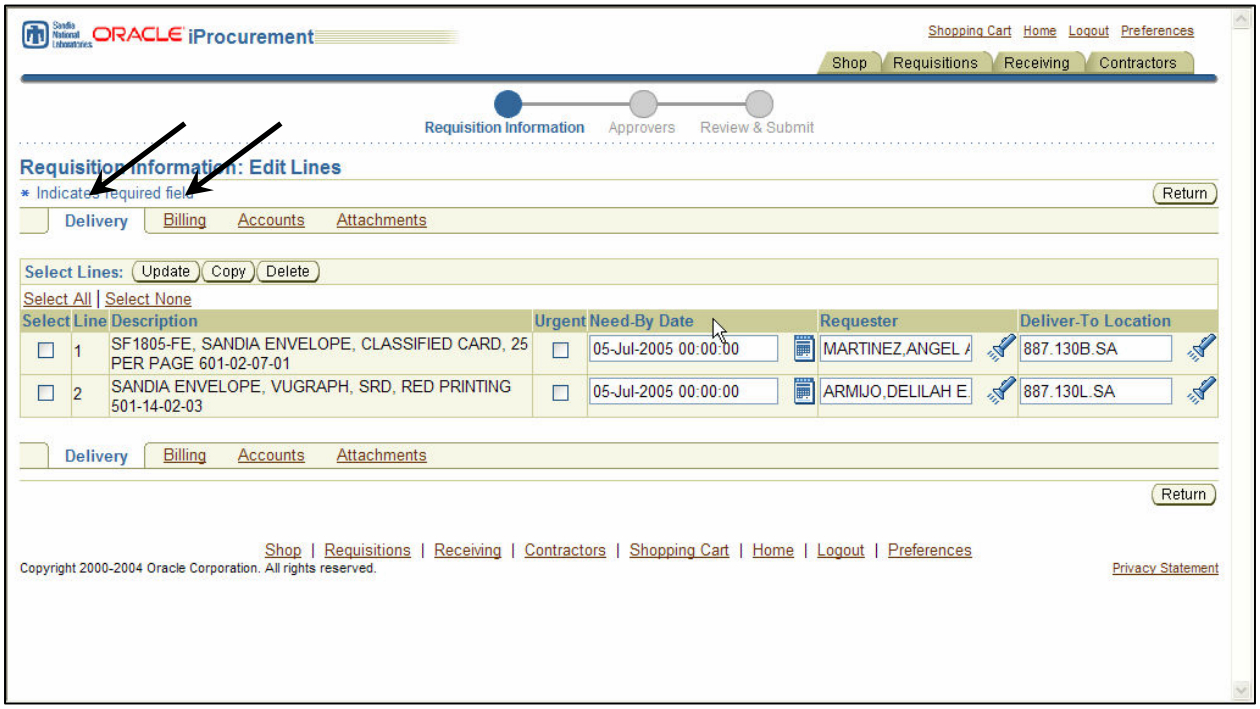
1. Enter the **Requisition Description** for the order. This will auto populate the description of the first item in your shopping cart.
2. Enter **Need-By Date** (Service Levels are determined based on contractual agreement (prefixes) for each item).
3. Enter **Requester** information (Last name,first name). NOTE: There is no space between the comma and the first name.
4. Enter **Deliver-To Location** (Building.Room.%). NOTE: Entering the Requester name will auto populate the Deliver-To Location. **Please verify this is the Deliver-To Location the Requester has provided.**
5. Enter Project Number in **Project** field.
6. Enter Task Number in **Task** field.
7. Enter Expenditure Type (PO ITEMS PURCHASED) in **Expenditure Type** field.
8. Enter Expenditure Org (Requesters Organization) in **Expenditure Org** field.
9. Enter Expenditure Item Date (Current date) in **Expenditure Item Date** field.

If the **Delivery** information and **Billing** information is the same for all items on the Purchase Requisition and the Requester is a Sandia employee, click the **Submit** button and proceed to page 2.0.17.

If the **Delivery** information and **Billing** information is NOT the same for all items on the Purchase Requisition, click the **Edit Lines** button and proceed to page 2.0.7.

To split a Project and Task on one line, click on the **Edit Lines** button and proceed to page 2.0.9.

To change the Delivery Information for different lines on the PR.

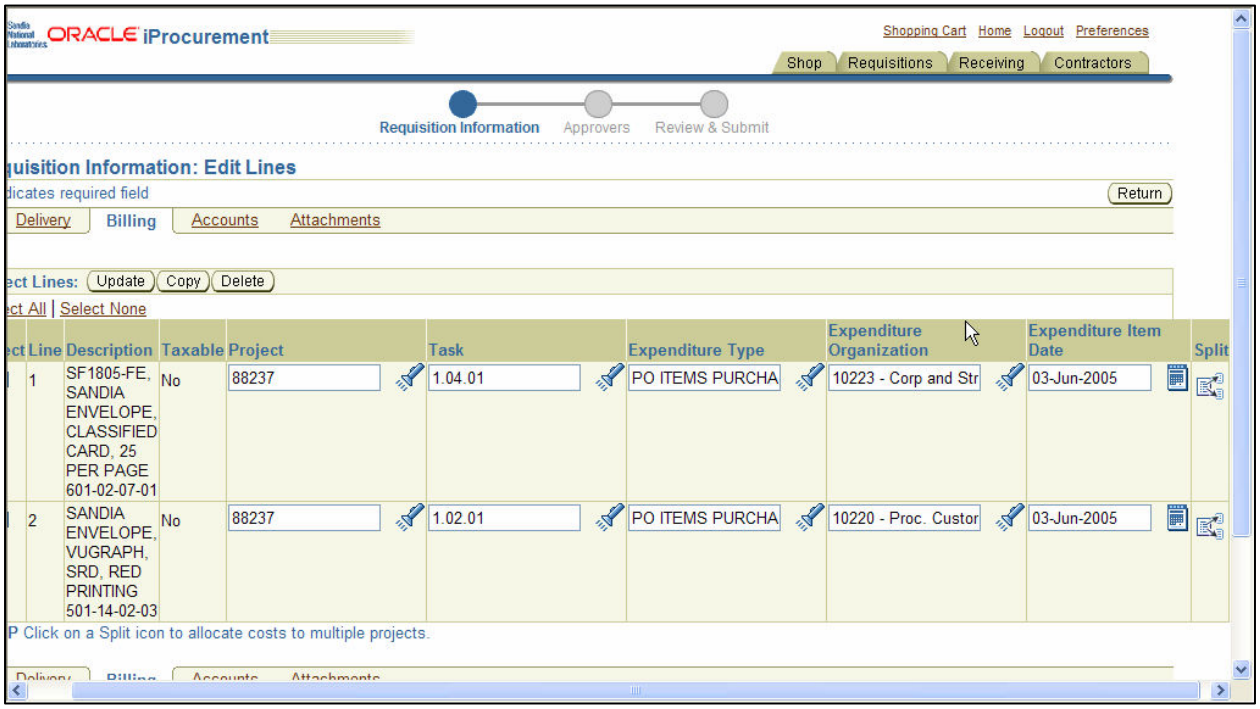


1. Make sure you are on the **Delivery** tab.
2. Change the **Delivery Information** on the required line.
3. If no other changes are required, click the **Return** button and proceed to page 2.0.13.

To change the **Billing Information** for different lines on the PR, click on the **Billing** hyperlink and proceed go page 2.0.8.

To split a Project and Task on one line, click on the Billing hyperlink and proceed to page 2.0.9.

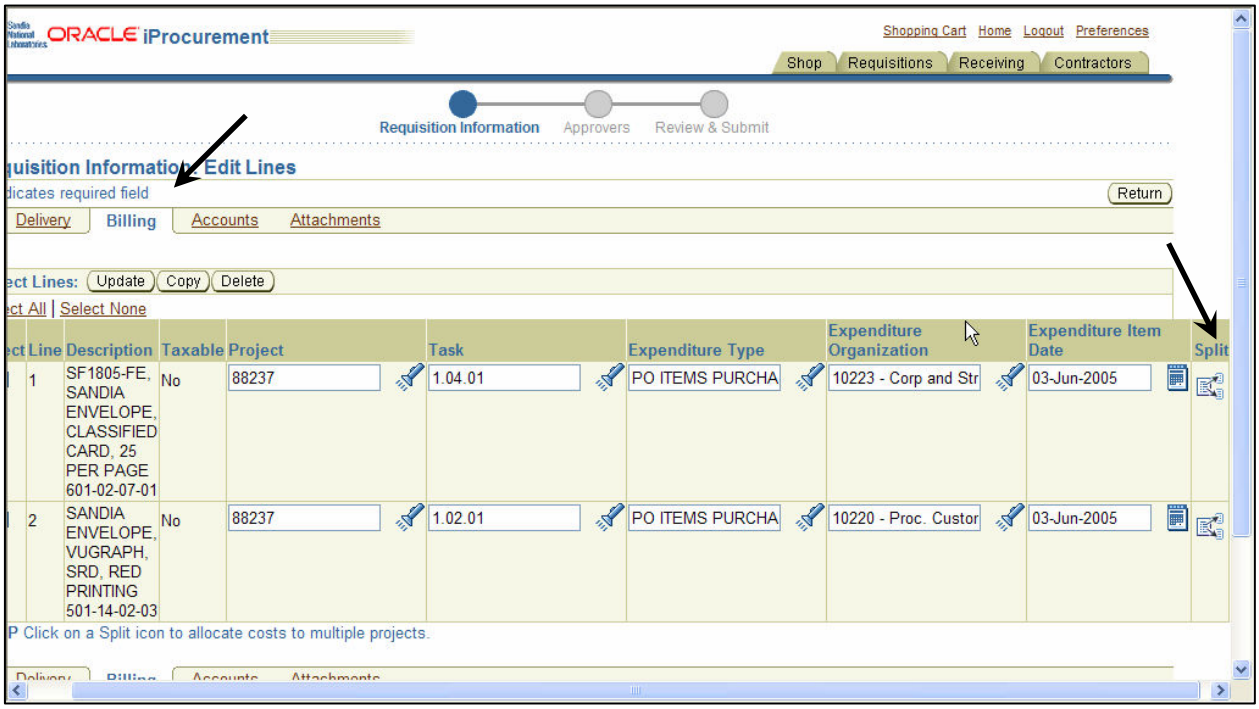
To change the Billing Information for different lines on the PR.



1. Make sure you are on the **Billing** tab.
2. Change the **Billing Information** on the required line.
3. If no other changes are required, click the **Return** button and proceed to page 2.0.13.

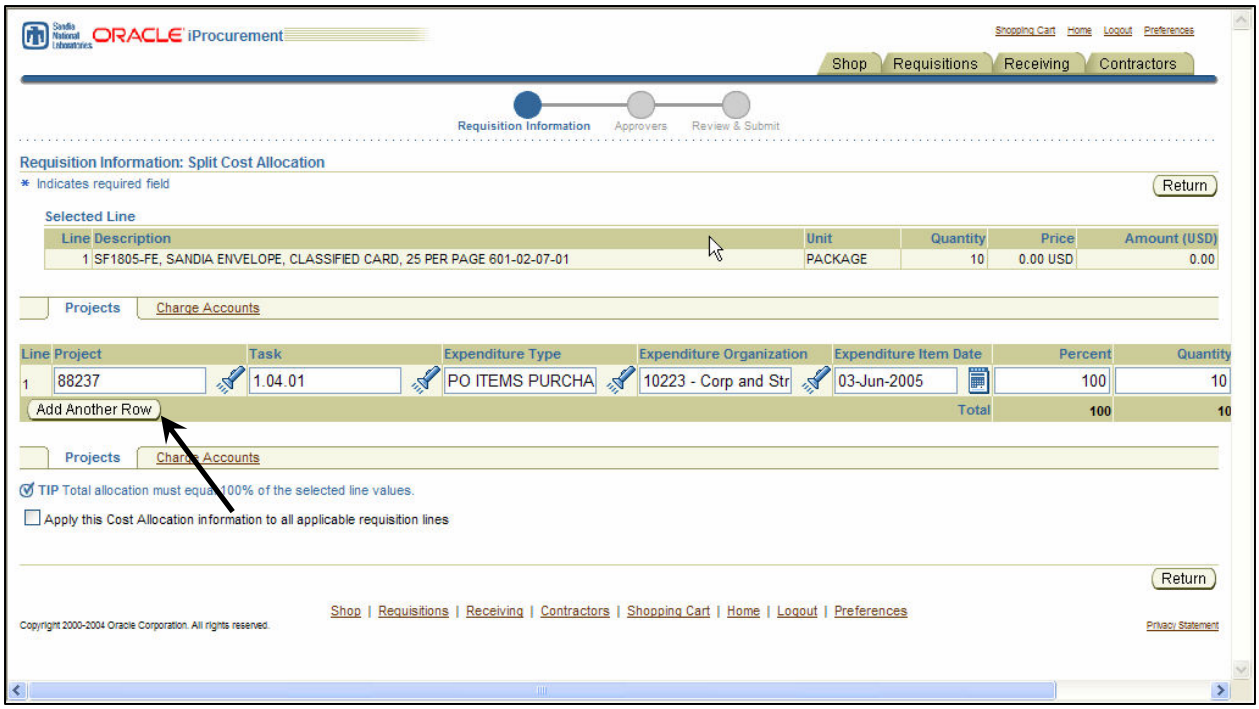
To split a Project and Task on one line, proceed to page 2.0.9.

ENTERING A MULTIPLE DISTRIBUTION – if you are not doing a split distribution, continue on with page 2.0.13.



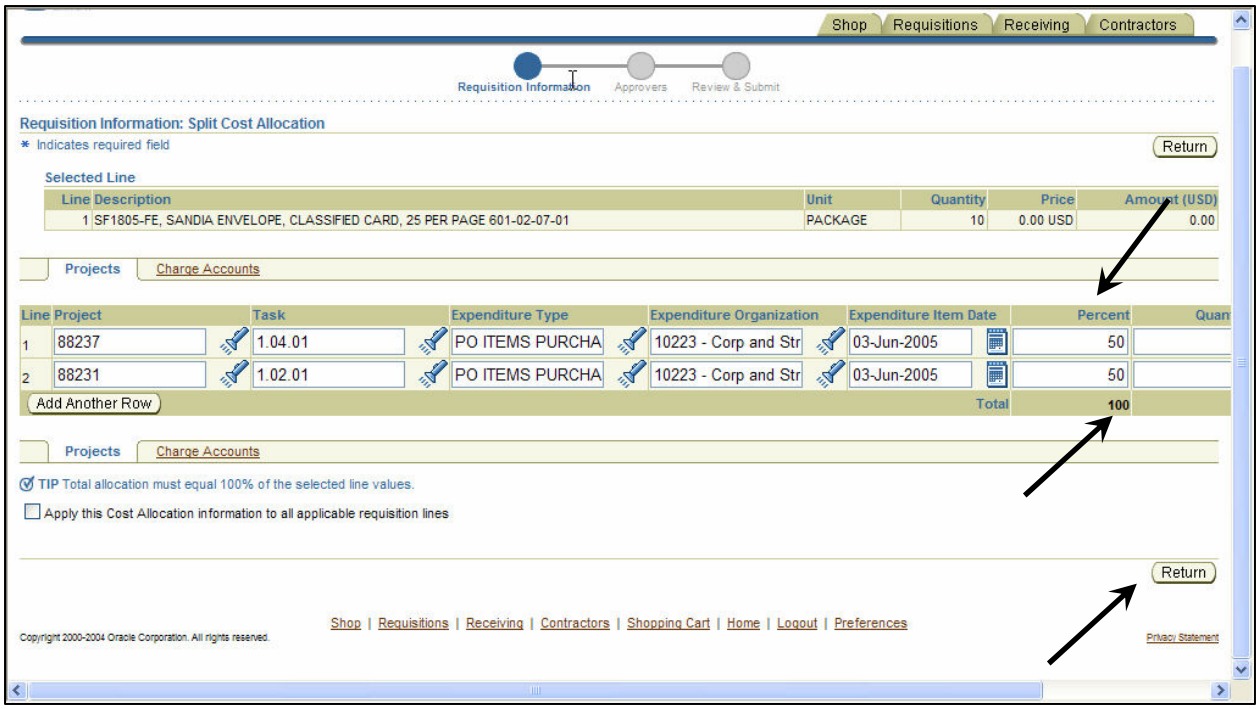
To do a split distribution for one item:

1. Make sure you are on the **Billing** tab.
2. Click on the **Split** icon at the end of the item row.

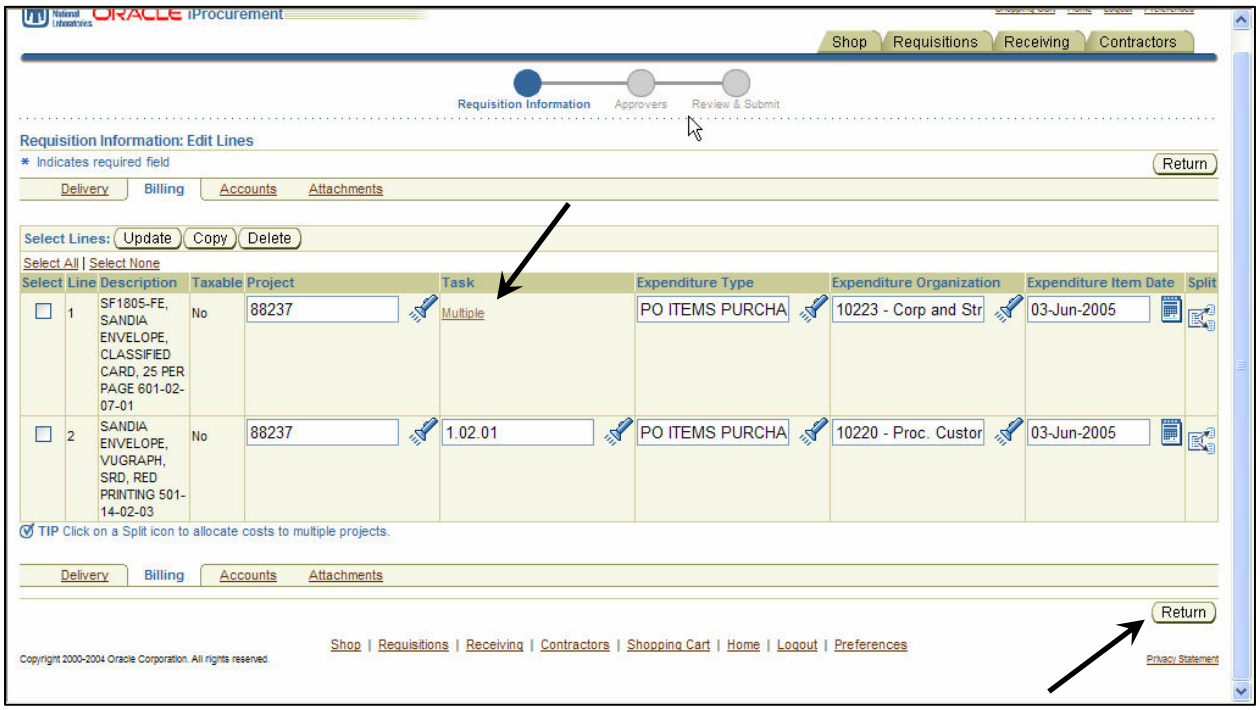


To add a new Project and Task for this line:

1. Click on the **Add New Row** button.

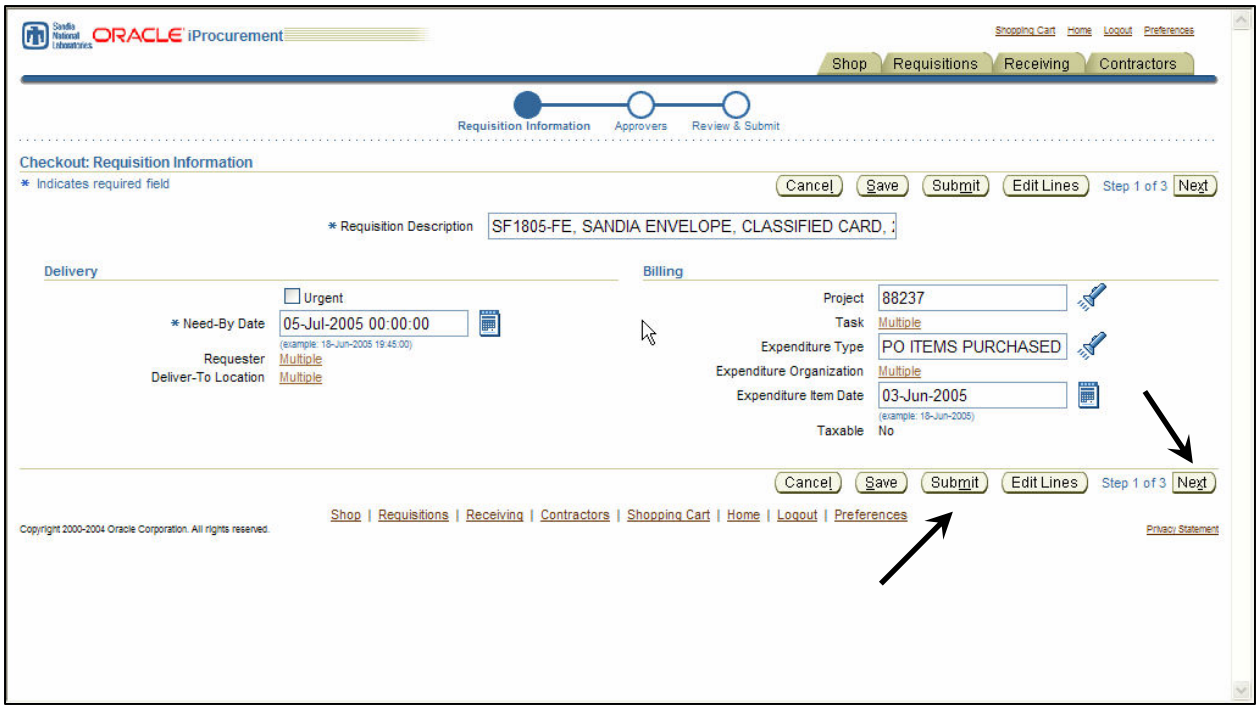


1. Add new project and task information.
2. Under **Percent**, enter the percent you wish to charge to each line. The **Total** must equal 100.
3. Once done, click the **Return** button.



The screen will refresh showing the **Multiple** Project and/or Task.

Click on the **Return** button.



The screen will refresh and show the fields that have been modified.

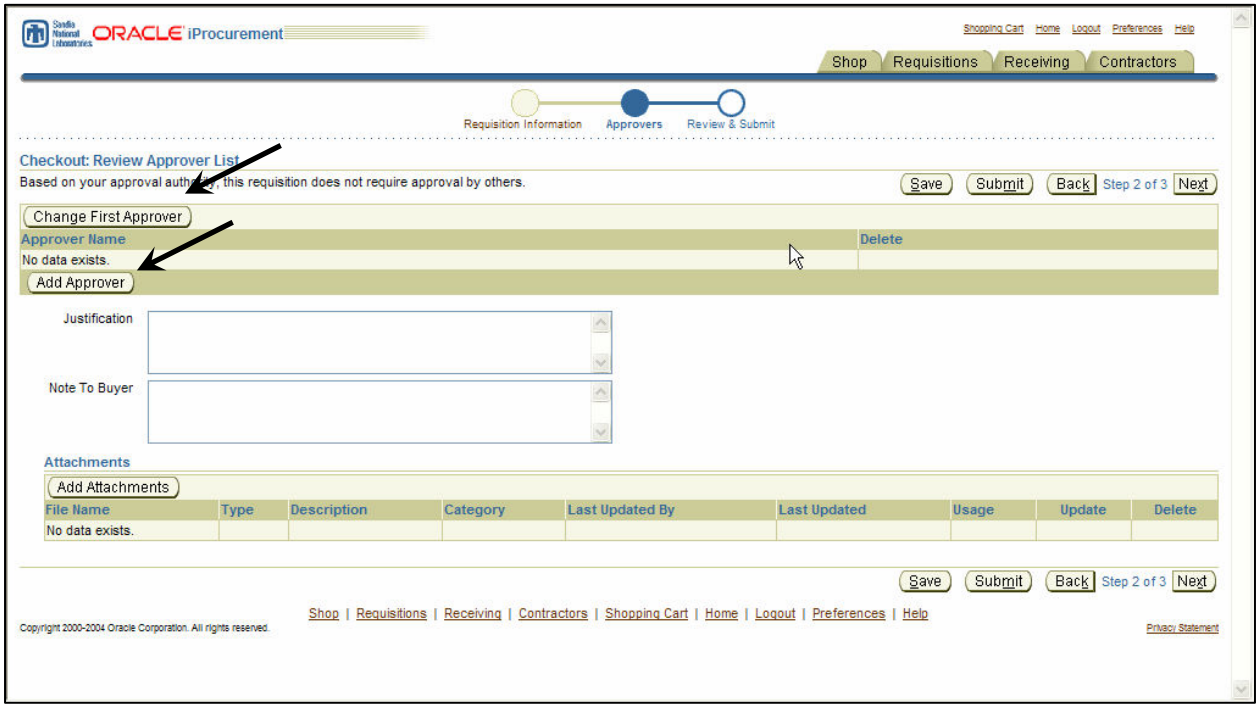
To submit the PR without adding an “approver”, click the **Submit** button and proceed to page 2.0.17.

To add an “approver” (if the Requester is a Contractor or over $25,000), click the **Next** button and proceed to page 2.0.14.

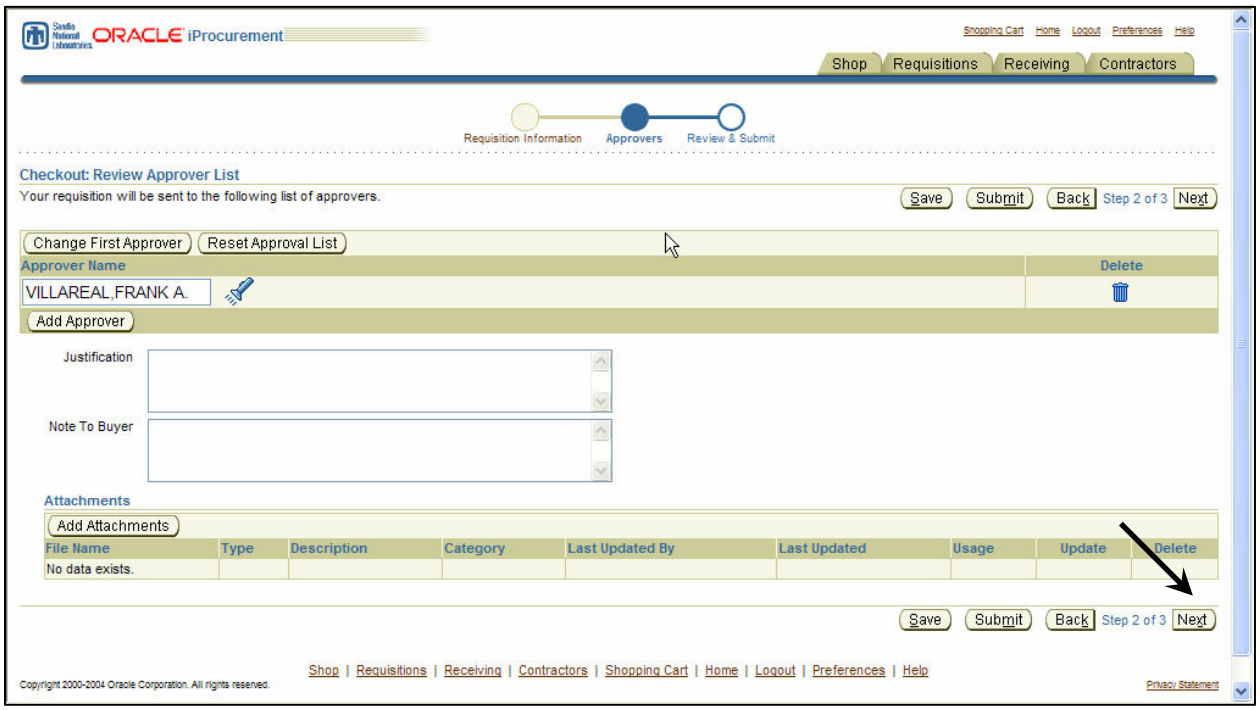
CONTRACTOR ORDERS & ORDERS OVER $25,000 – SETTING UP APPROVER.

Ask the requester if they are a Sandia employee or Sandia Contractor.

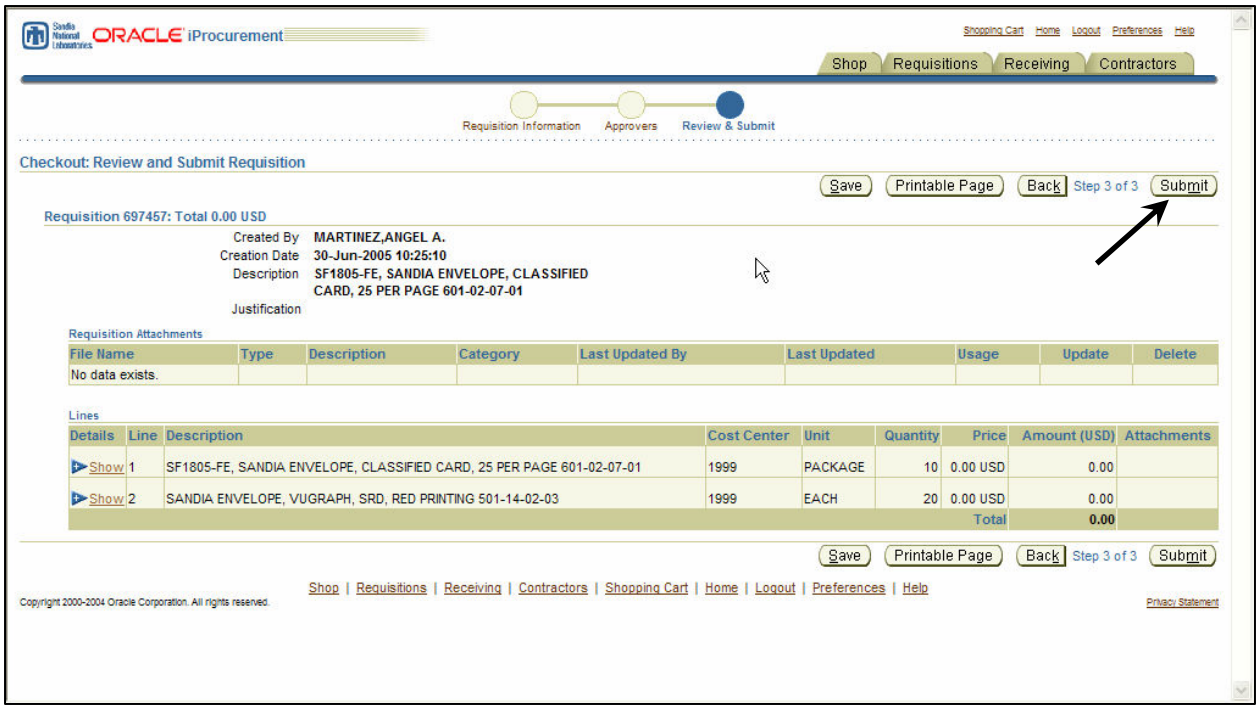
- **If Sandia employee, no approver is required, skip to page 2.0.12.**
- **If Sandia Contractor, proceed to Step 1 below.**



1. If the item is for a Sandia Contractor or the item is over $25,000, then the order requires approval, and you must input the manager of the Sandia Requester. Be sure and remove the 10223-department manager if an approver is already populated.
2. If the 10223-department manager is already populated, click on **Change the First Approver**.
3. To ADD a manager approver, click the **Add Approver** button.

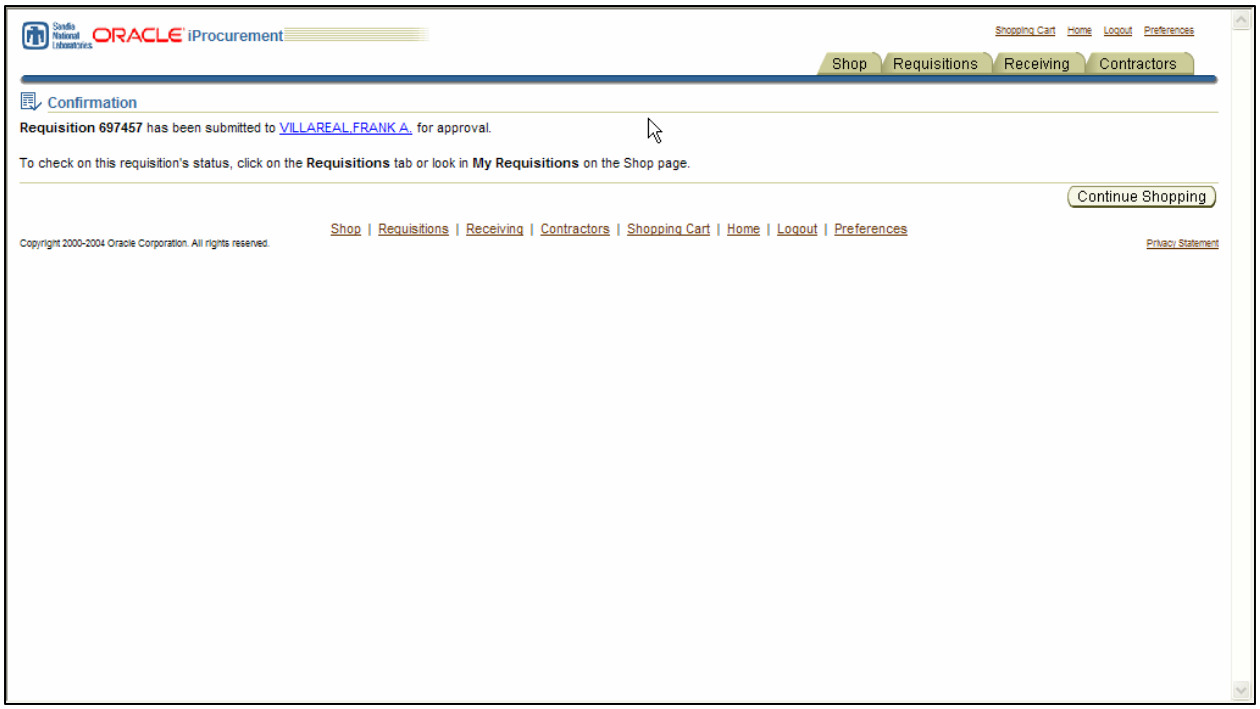


1. The new approver will be displayed.
2. Click on the **Next** button.



The final “Review and Submit Requisition” screen will appear. Check the information for accuracy.

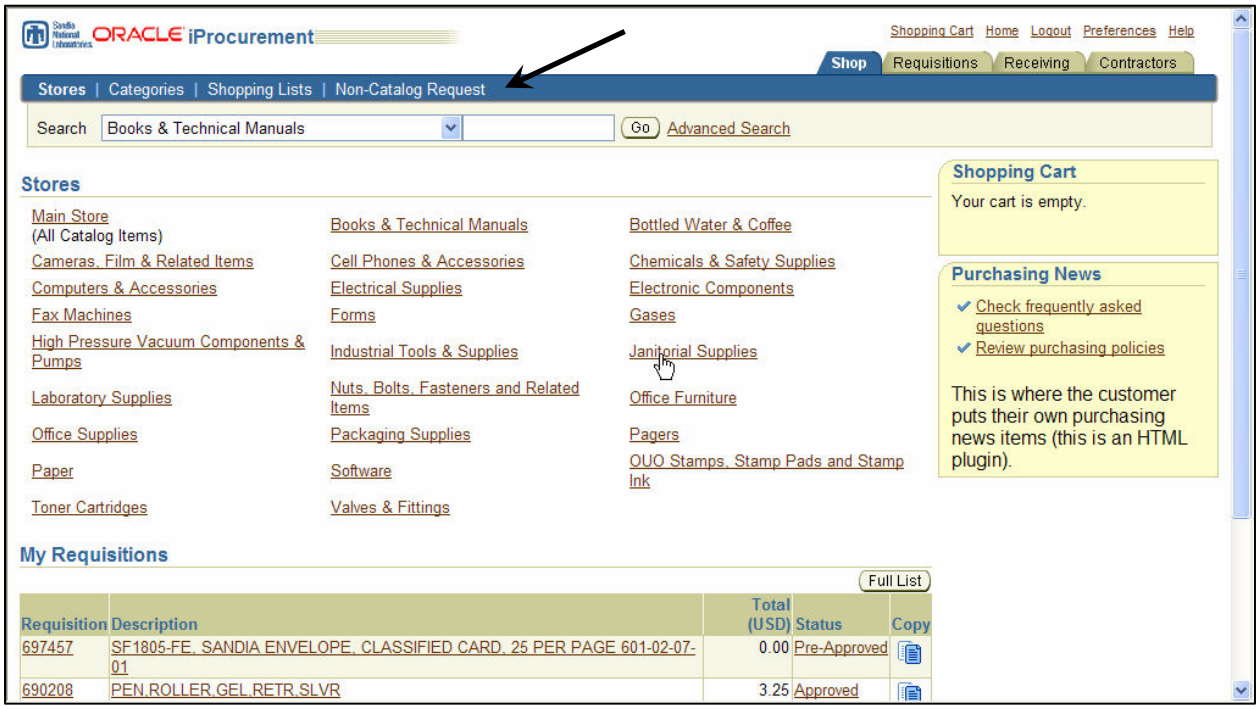
Click the **Submit** button.



Once the PR has been submitted, a **Confirmation** page will appear with the PR number.

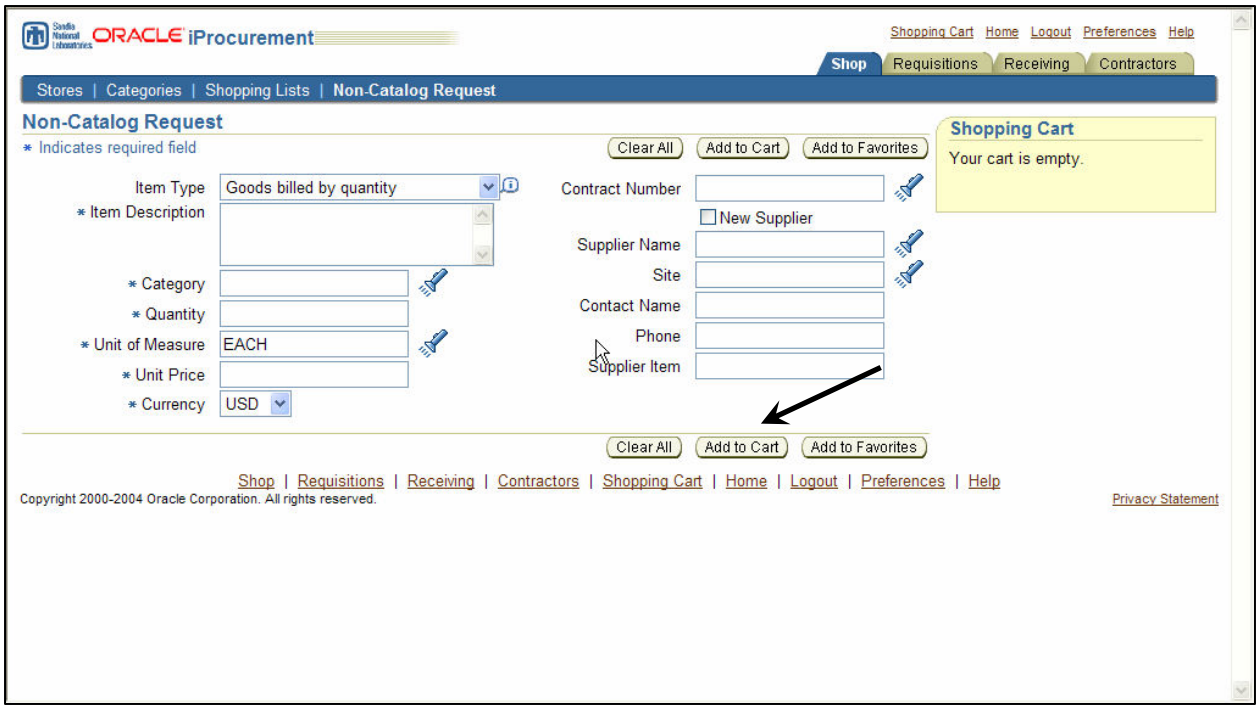
You have successfully placed a catalog order!!

Placing Non-Catalog Orders

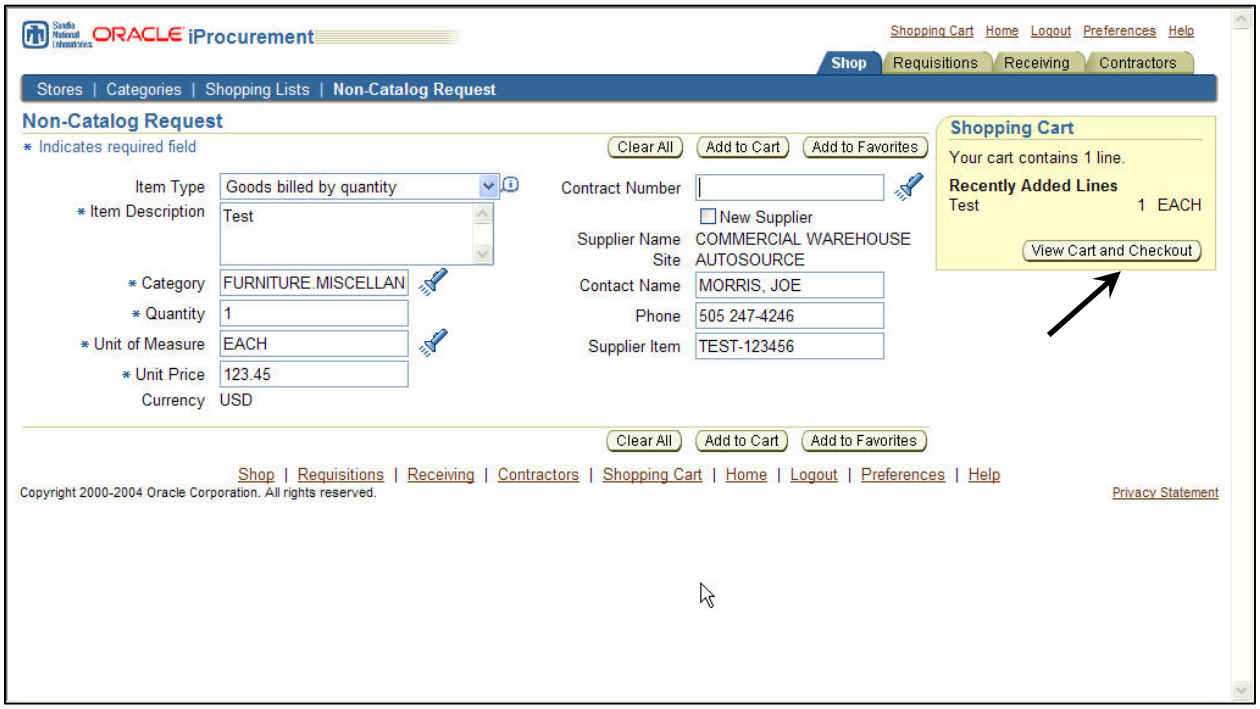


To place a Non Catalog Order: (SNL Internet Procurement for Supplies>Home Page)

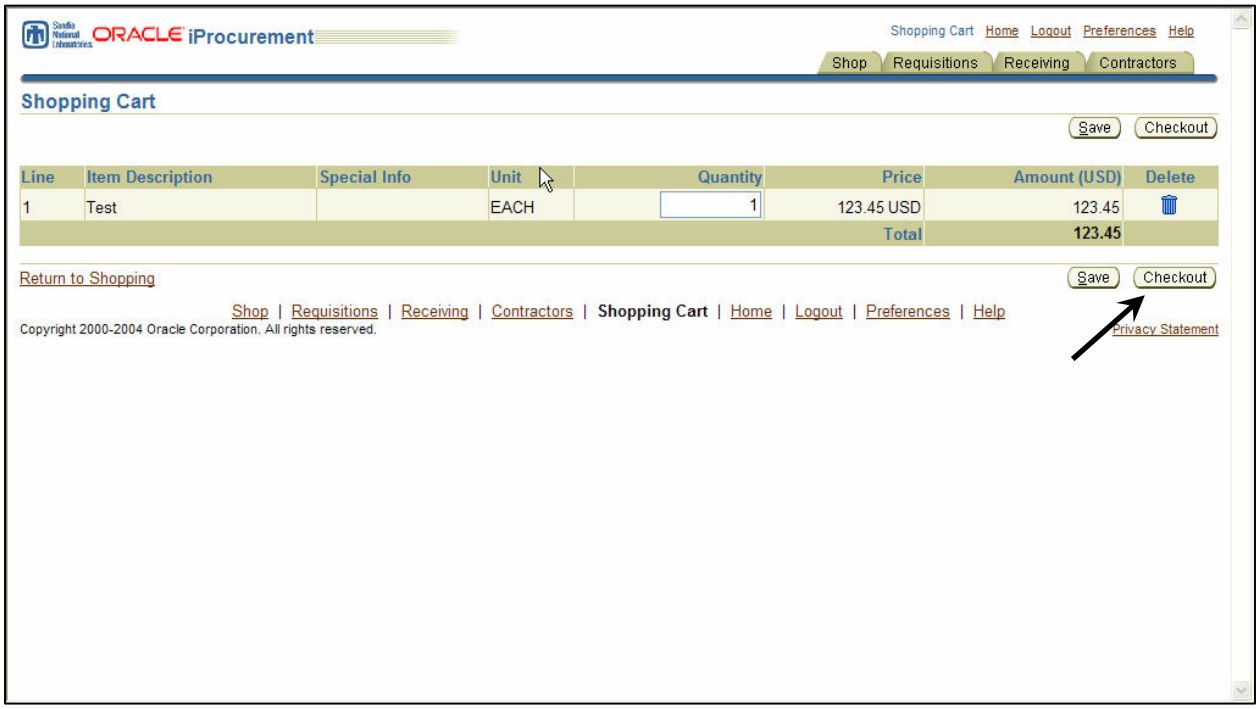
1. Click **Non-Catalog Request.**



1. Select **Item Type**, JIT Contractors will use one of the two (Goods billed by quantity or Services billed by quantity).
2. Enter product/service Description in **Item Description** field (you may also include part number). NOTE: Do not use the inch or feet tick marks (“, ‘) to represent inches or feet. Spell the word out. Suppliers **must** enter meaningful, detailed descriptions for all non-catalog items. Only use obvious abbreviations such as “oz” for ounce and “blk” for black.
3. Enter Category in **Category** field. That is the assigned category for your company.
4. Enter Quantity in **Quantity** field.
5. Enter Unit of Measure in **Unit of Measure** field.
6. Enter Price in **Unit Price** field.
7. Verify **Currency** field defaulted to USD.
8. Enter your Sandia JIT Agreement CPA number in the **Contract Number** field. This will then populate the **Supplier Name** and **Site**. The **Contact Name/Phone** fields may auto populate, but they are not required fields. There is no need to worry if they do not auto populate.
9. You **MUST** enter the **Supplier Item** number. This number is the part number for the item ordered along with the assigned Sandia prefix. This Supplier Item number is what drives supplier service levels.
10. Click the **Add to Cart** button.



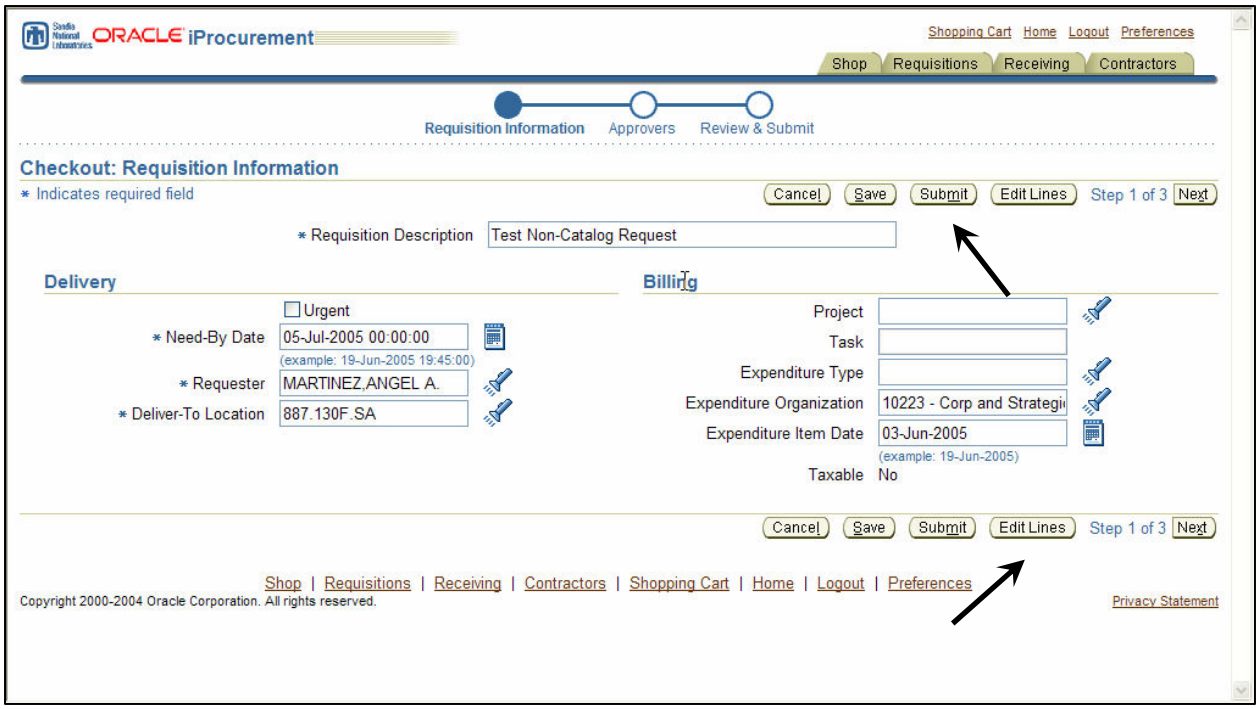
1. Once you have clicked **Add to Cart**, the item will be shown in the **Shopping Cart** preview.
2. If you are ready to checkout, click the **View Cart and Checkout** button.



Your Shopping Cart Contents will be displayed

1. Verify items, quantity and price are correct
2. Select one of the following options:
    a. **Return to Shopping** (if you need to order other items)
    b. **Save** (To save items in your cart and complete the checkout process at a later time)
    c. **Checkout** (Step-by-Step checkout)

Note: Contract Suppliers will typically "Checkout"



Note: * indicates a required field. Some of the fields in this view auto populate, such as the Requester, Expenditure Type, and Expenditure Org.

1. Enter the **Requisition Description** for the order.
2. Enter **Need-By Date** (Service Levels are determined based on contractual agreement (prefixes) for each item).
3. Enter **Requester** information (Last name,first name). NOTE: There is no space between the comma and the first name.
4. Enter **Deliver-To Location** (Building.Room.%). NOTE: Entering the Requester name will auto populate the Deliver-To Location. Please verify this is the Deliver-To Location the Requester has provided.
5. Enter Project Number in **Project** field.
6. Enter Task Number in **Task** field.
7. Enter Expenditure Type (PO ITEMS PURCHASED) in **Expenditure Type** field.
8. Enter Expenditure Org (Requesters Organization) in **Expenditure Org** field.
9. Enter Expenditure Item Date (Current date) in **Expenditure Item Date** field.

If the **Delivery** information and **Billing** information is the same for all items on the Purchase Requisition and the Requester is a Sandia employee, click the **Submit** button and proceed to page 3.0.5.

If the **Delivery** information and **Billing** information is NOT the same for all items on the Purchase Requisition, click the **Edit Lines** button and proceed to page 2.0.7.

To split a Project and Task on one line, click on the **Edit Lines** button and proceed to page 2.0.9.

You will receive a “Submit Confirmation” and a “Requisition Number” for your records.

You have successfully placed a non-catalog order!!

CANCELLING AN ORDER

It is the responsibility of the contract supplier to notify their Sandia Contract Administrator (SCA) that a requisition needs to be cancelled.

A 'Notice of Cancellation' (next page) will need to be completed and faxed or e-mailed to your SCA. It is important to complete all the columns on the form. A copy of the 'Notice of Cancellation' form may be found at the end of this section.

Note: Do not use IP to cancel an order, use the Notice of Cancellation form.

NOTICE OF CANCELLATION

Date: _____ To (SCA): _____

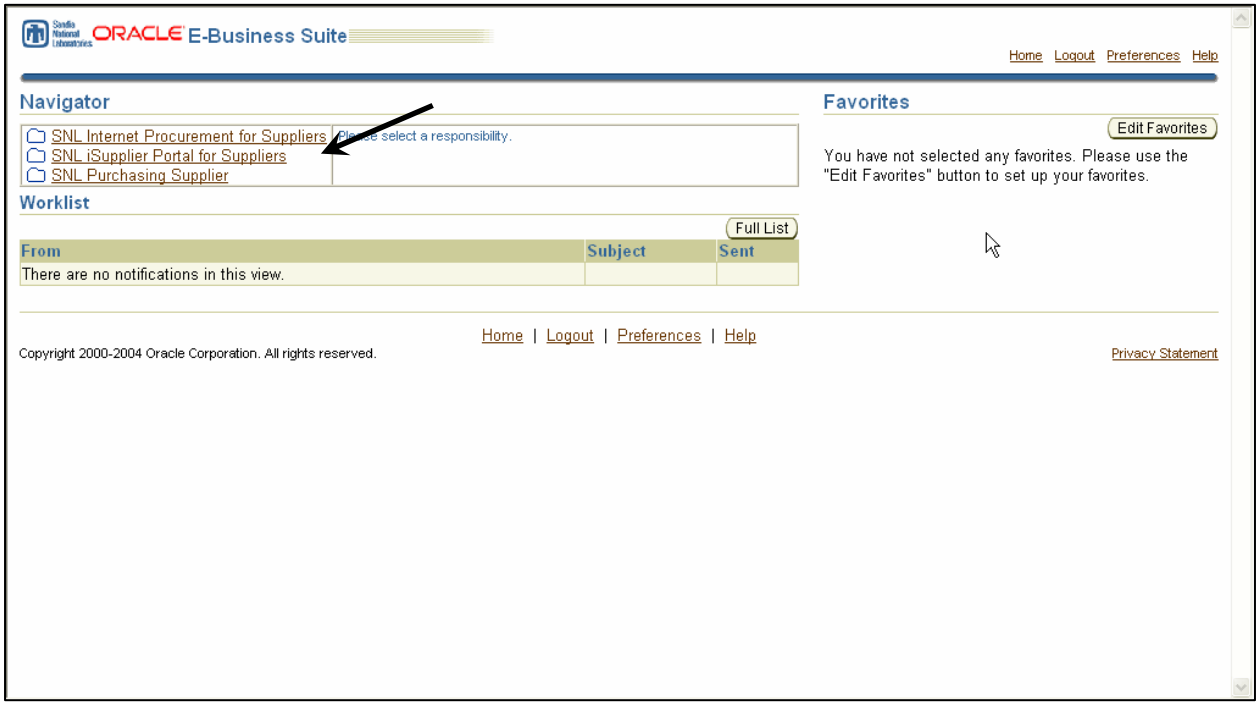
Supplier: _____ Contract#: _____

From: _____ Phone Number: _____

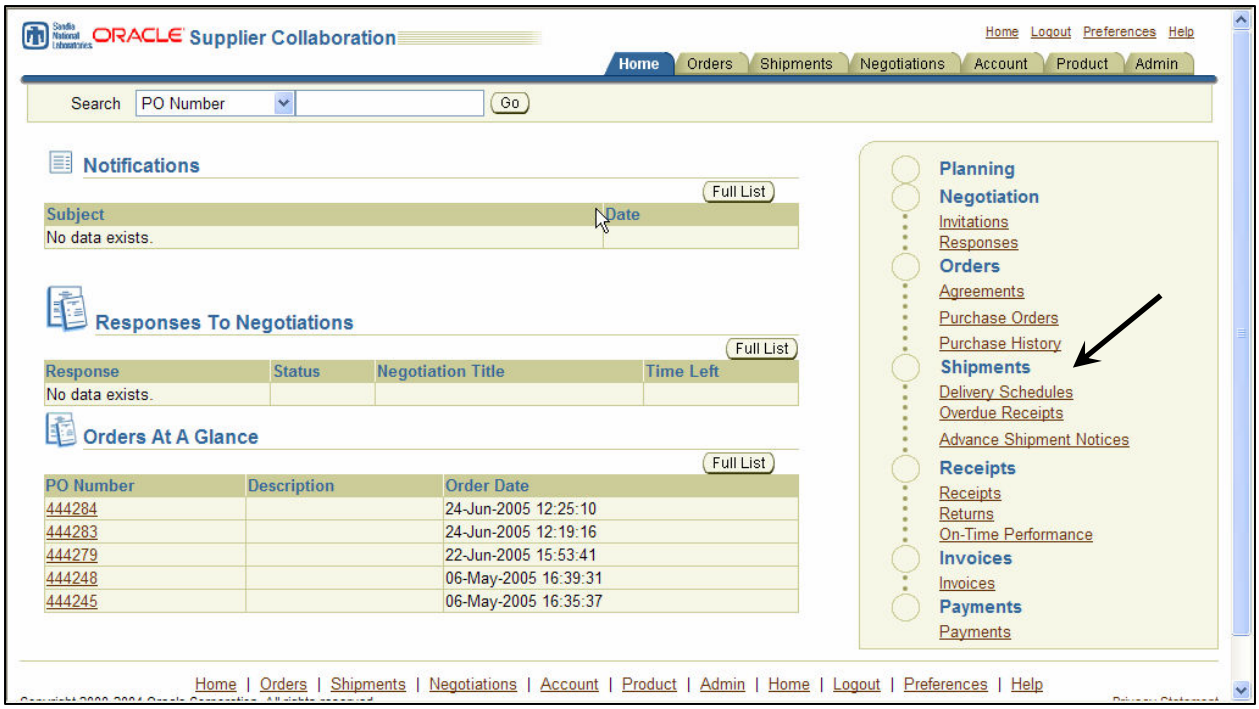
PO #	PO Line #	Requisition Number	Item Number	Reason for cancellation

FAX TO: Sandia JIT Procurement @ 844-1151

DOWNLOADING ORDERS

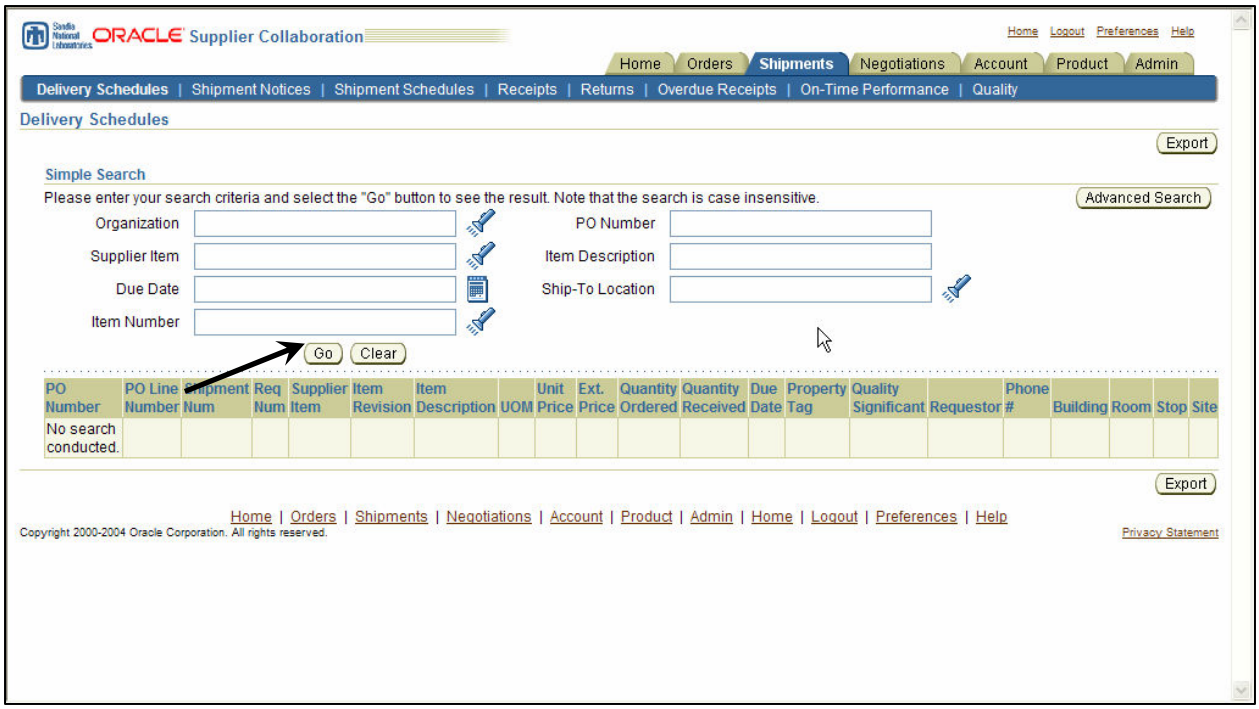


1. Select **SNL iSupplier Portal for Suppliers**.



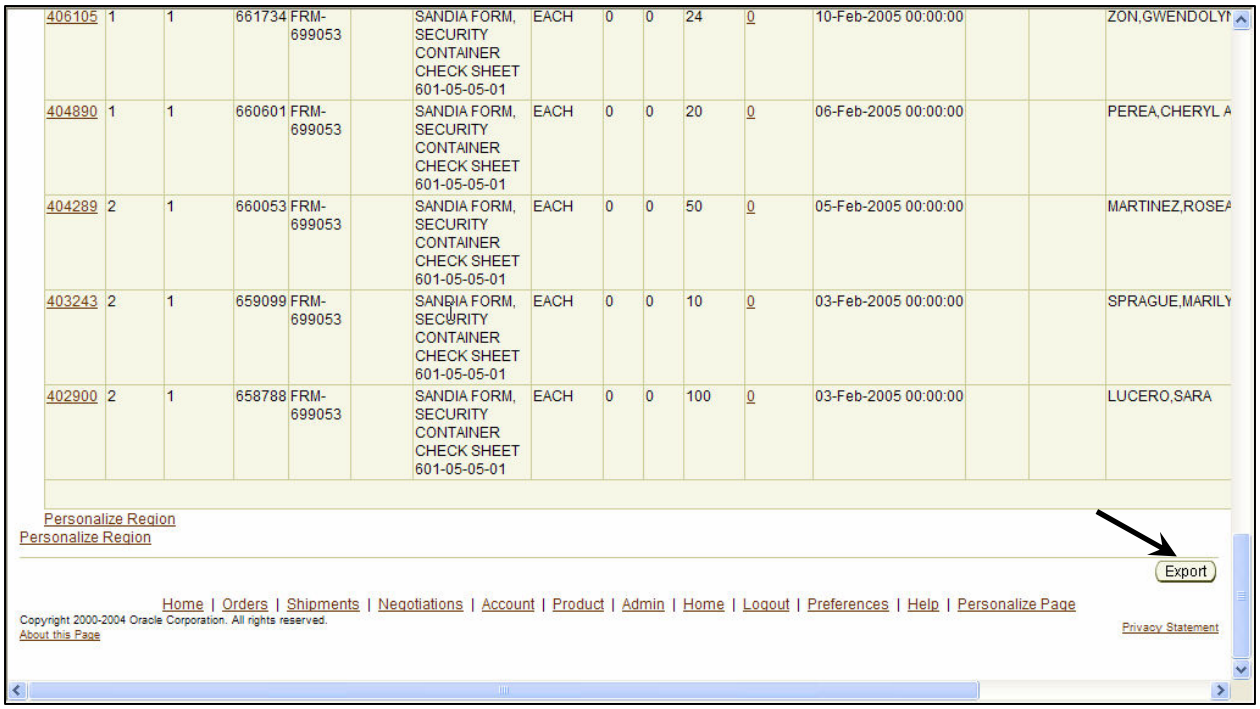
To obtain orders: Access Internet Supplier Portal Home Page (iSupplier Portal for Suppliers>Home Page).

1. Select **Delivery Schedule** to search for all OPEN Purchase Orders.



1. Do not enter any search criteria.
2. Click the **Go** button.

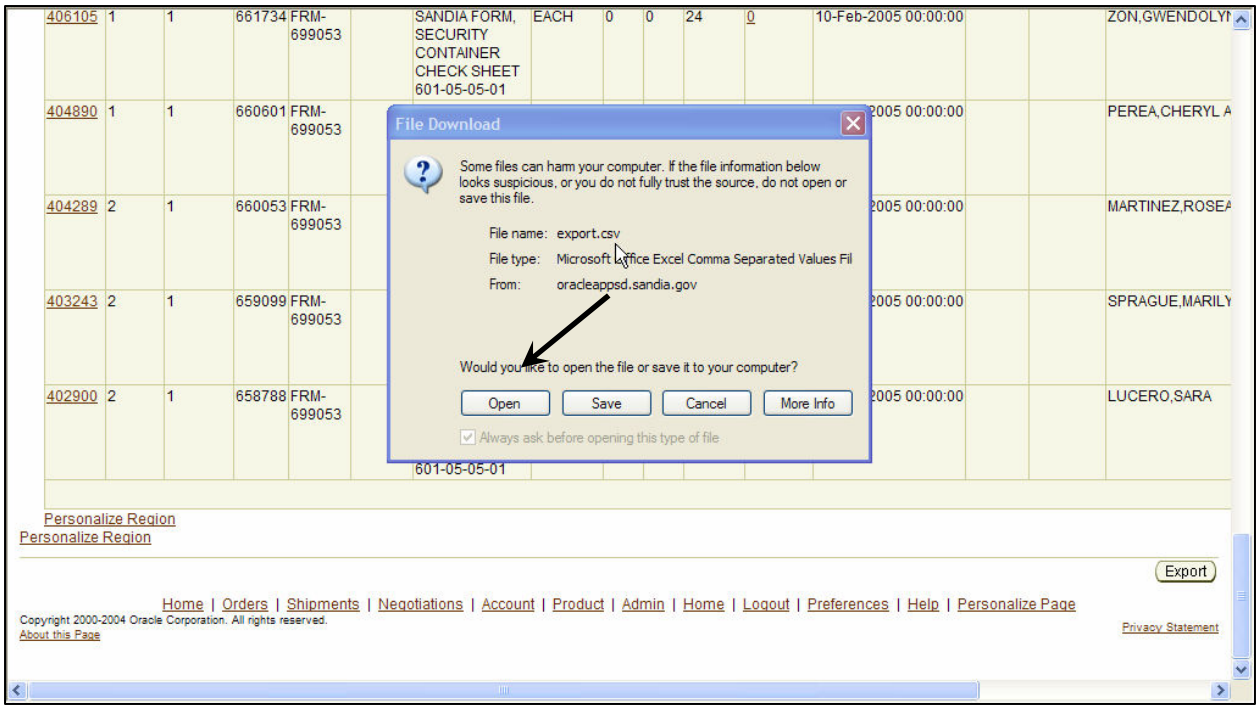
All “Open” orders will appear on the screen.



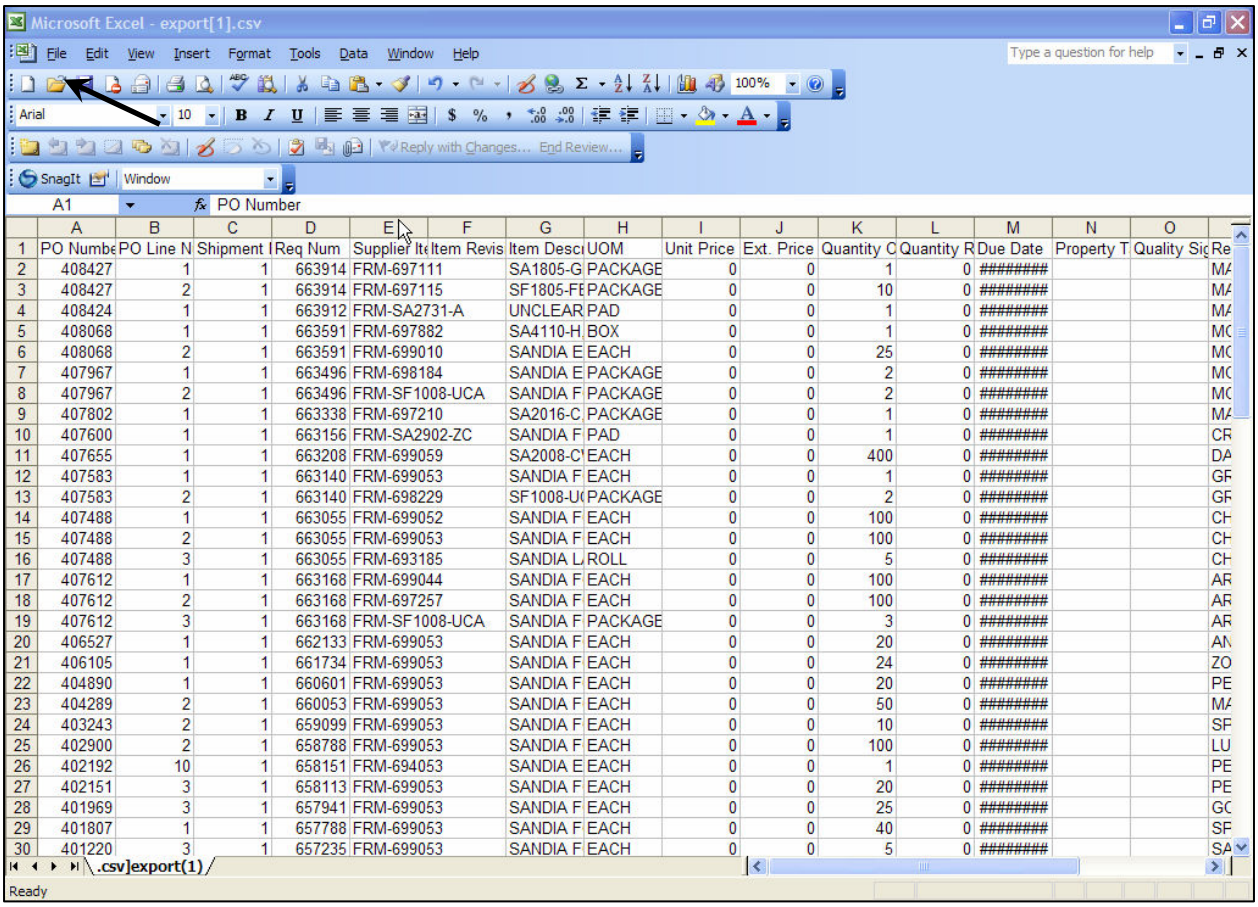
406105	1	1	661734	FRM-699053		SANDIA FORM, SECURITY CONTAINER CHECK SHEET 601-05-05-01	EACH	0	0	24	0	10-Feb-2005 00:00:00			ZON,GWENDOLYN
404890	1	1	660601	FRM-699053		SANDIA FORM, SECURITY CONTAINER CHECK SHEET 601-05-05-01	EACH	0	0	20	0	06-Feb-2005 00:00:00			PEREA,CHERYL A
404289	2	1	660053	FRM-699053		SANDIA FORM, SECURITY CONTAINER CHECK SHEET 601-05-05-01	EACH	0	0	50	0	05-Feb-2005 00:00:00			MARTINEZ,ROSEA
403243	2	1	659099	FRM-699053		SANDIA FORM, SECURITY CONTAINER CHECK SHEET 601-05-05-01	EACH	0	0	10	0	03-Feb-2005 00:00:00			SPRAGUE,MARILY
402900	2	1	658788	FRM-699053		SANDIA FORM, SECURITY CONTAINER CHECK SHEET 601-05-05-01	EACH	0	0	100	0	03-Feb-2005 00:00:00			LUCERO,SARA

Your orders will be displayed.

1. Click **Export** to download your orders to a Microsoft Excel file to prepare for printing labels.



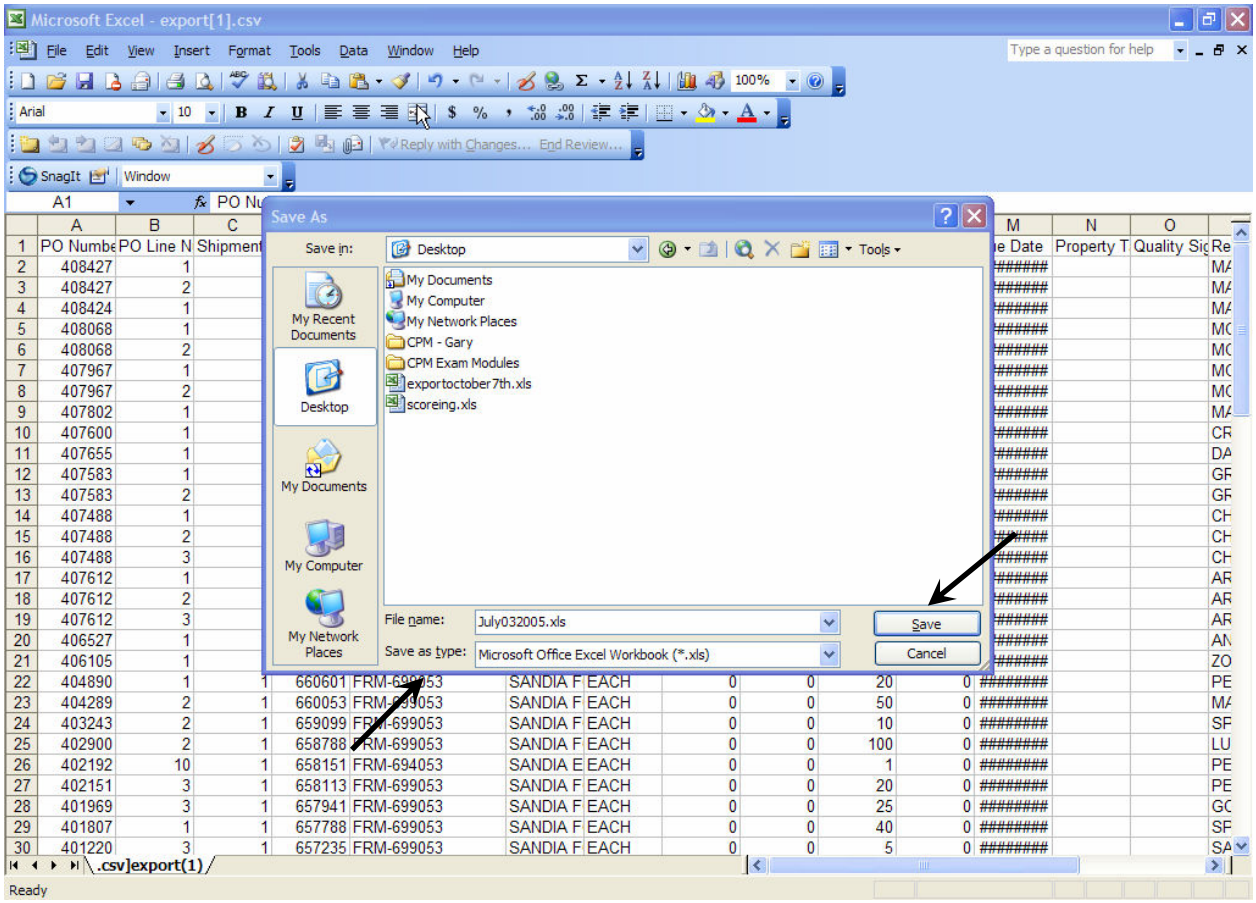
1. You will be prompted to “**Open**” or “**Save**” the file.
2. Choose the option to **Open** the export file.



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	
1	PO Numbe	PO Line N	Shipment I	Req Num	Supplier Ite	Item Revis	Item Desci	UOM	Unit Price	Ext. Price	Quantity C	Quantity R	Due Date	Property T	Quality Sig	Re
2	408427	1	1	663914	FRM-697111		SA1805-G	PACKAGE	0	0	1	0	########			MA
3	408427	2	1	663914	FRM-697115		SF1805-FE	PACKAGE	0	0	10	0	########			MA
4	408424	1	1	663912	FRM-SA2731-A		UNCLEAR	PAD	0	0	1	0	########			MA
5	408068	1	1	663591	FRM-697882		SA4110-H	BOX	0	0	1	0	########			MC
6	408068	2	1	663591	FRM-699010		SANDIA E	EACH	0	0	25	0	########			MC
7	407967	1	1	663496	FRM-698184		SANDIA E	PACKAGE	0	0	2	0	########			MC
8	407967	2	1	663496	FRM-SF1008-UCA		SANDIA F	PACKAGE	0	0	2	0	########			MC
9	407802	1	1	663338	FRM-697210		SA2016-C	PACKAGE	0	0	1	0	########			MA
10	407600	1	1	663156	FRM-SA2902-ZC		SANDIA F	PAD	0	0	1	0	########			CR
11	407655	1	1	663208	FRM-699059		SA2008-C'	EACH	0	0	400	0	########			DA
12	407583	1	1	663140	FRM-699053		SANDIA F	EACH	0	0	1	0	########			GR
13	407583	2	1	663140	FRM-698229		SF1008-U(	PACKAGE	0	0	2	0	########			GR
14	407488	1	1	663055	FRM-699052		SANDIA F	EACH	0	0	100	0	########			CH
15	407488	2	1	663055	FRM-699053		SANDIA F	EACH	0	0	100	0	########			CH
16	407488	3	1	663055	FRM-693185		SANDIA L	ROLL	0	0	5	0	########			CH
17	407612	1	1	663168	FRM-699044		SANDIA F	EACH	0	0	100	0	########			AR
18	407612	2	1	663168	FRM-697257		SANDIA F	EACH	0	0	100	0	########			AR
19	407612	3	1	663168	FRM-SF1008-UCA		SANDIA F	PACKAGE	0	0	3	0	########			AR
20	406527	1	1	662133	FRM-699053		SANDIA F	EACH	0	0	20	0	########			AN
21	406105	1	1	661734	FRM-699053		SANDIA F	EACH	0	0	24	0	########			ZO
22	404890	1	1	660601	FRM-699053		SANDIA F	EACH	0	0	20	0	########			PE
23	404289	2	1	660053	FRM-699053		SANDIA F	EACH	0	0	50	0	########			MA
24	403243	2	1	659099	FRM-699053		SANDIA F	EACH	0	0	10	0	########			SF
25	402900	2	1	658788	FRM-699053		SANDIA F	EACH	0	0	100	0	########			LU
26	402192	10	1	658151	FRM-694053		SANDIA E	EACH	0	0	1	0	########			PE
27	402151	3	1	658113	FRM-699053		SANDIA F	EACH	0	0	20	0	########			PE
28	401969	3	1	657941	FRM-699053		SANDIA F	EACH	0	0	25	0	########			GC
29	401807	1	1	657788	FRM-699053		SANDIA F	EACH	0	0	40	0	########			SF
30	401220	3	1	657235	FRM-699053		SANDIA F	EACH	0	0	5	0	########			SA

Your Order file will display.

1. Save your file (File, Save As) to your hard drive.



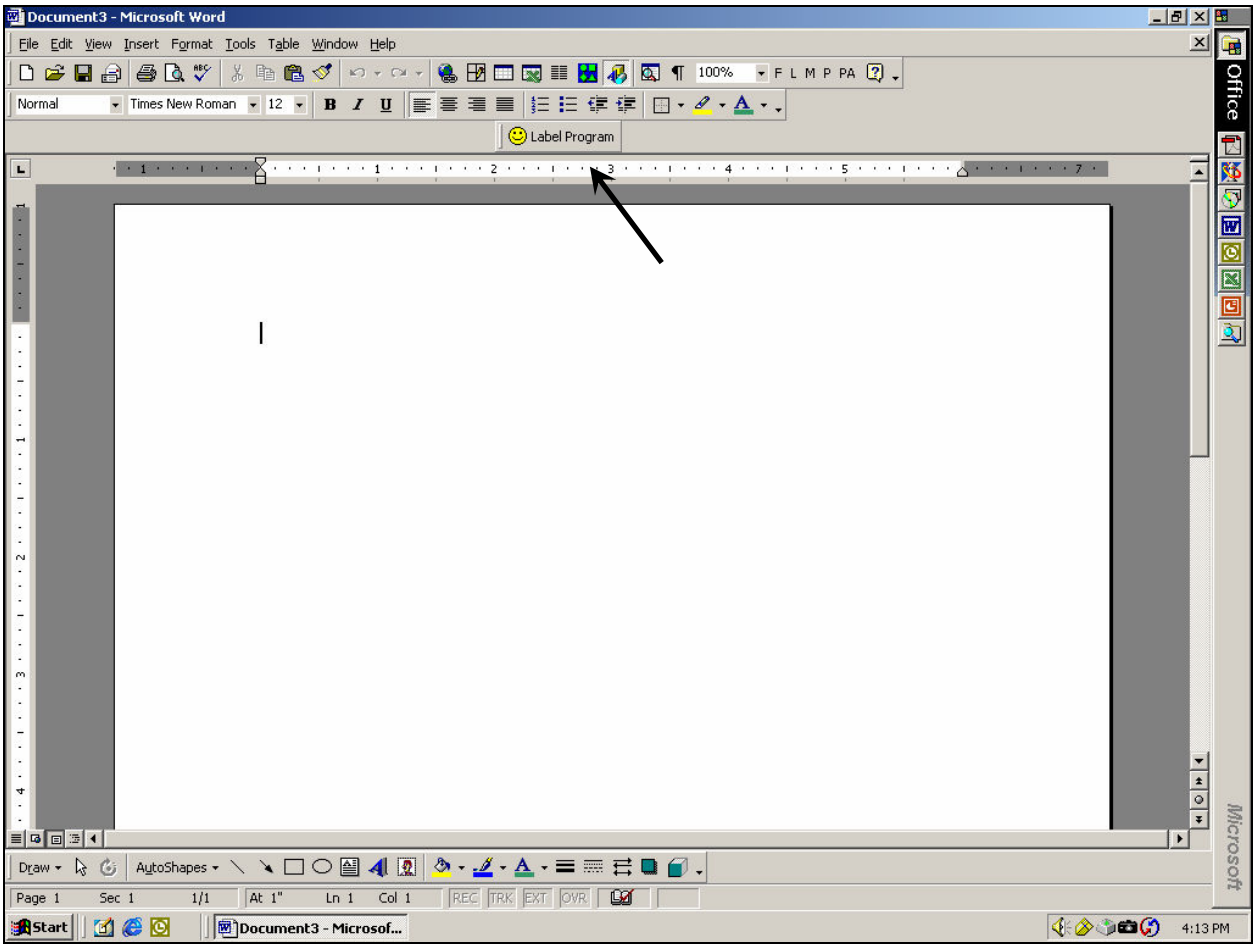
1. Save your file with a meaningful file name (in case you ever have to go back to the file). You can save it with the date you exported it.
2. Save your file as a **Microsoft Excel Worksheet (.xls)** format.
3. Click on the **Save** button.
4. Exit out of Excel and return to the iSupplier Portal Home page.

You have now successfully exported your order file. You will need to export your order file on a regular basis. Be aware that each time you export your order file; the POs that appear are ONLY “open” orders. This will not pull POs that have already been filled and submitted for payment.

Once an order has been placed in the Internet Procurement system, the order is immediately available for export.

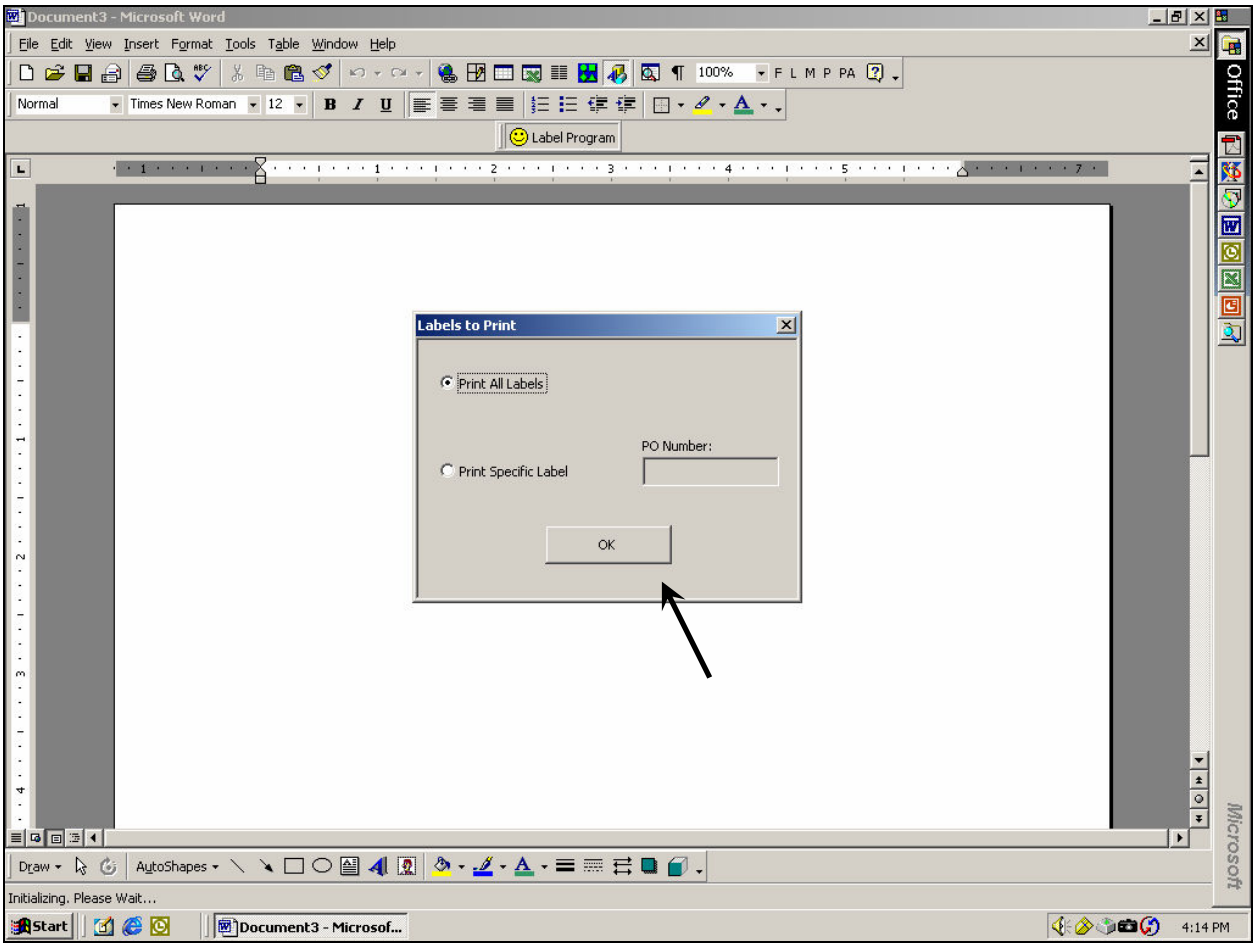
If you deliver products to receiving, you are now ready to print labels and create an Advanced Shipment Notice (ASN). If you direct deliver, you are now ready to proceed to creating an ASN.

PRINTING DELIVERY LABELS



To print labels: Access the Label Program Icon from your desktop

1. Select **Label Program** button (the smiley face icon).

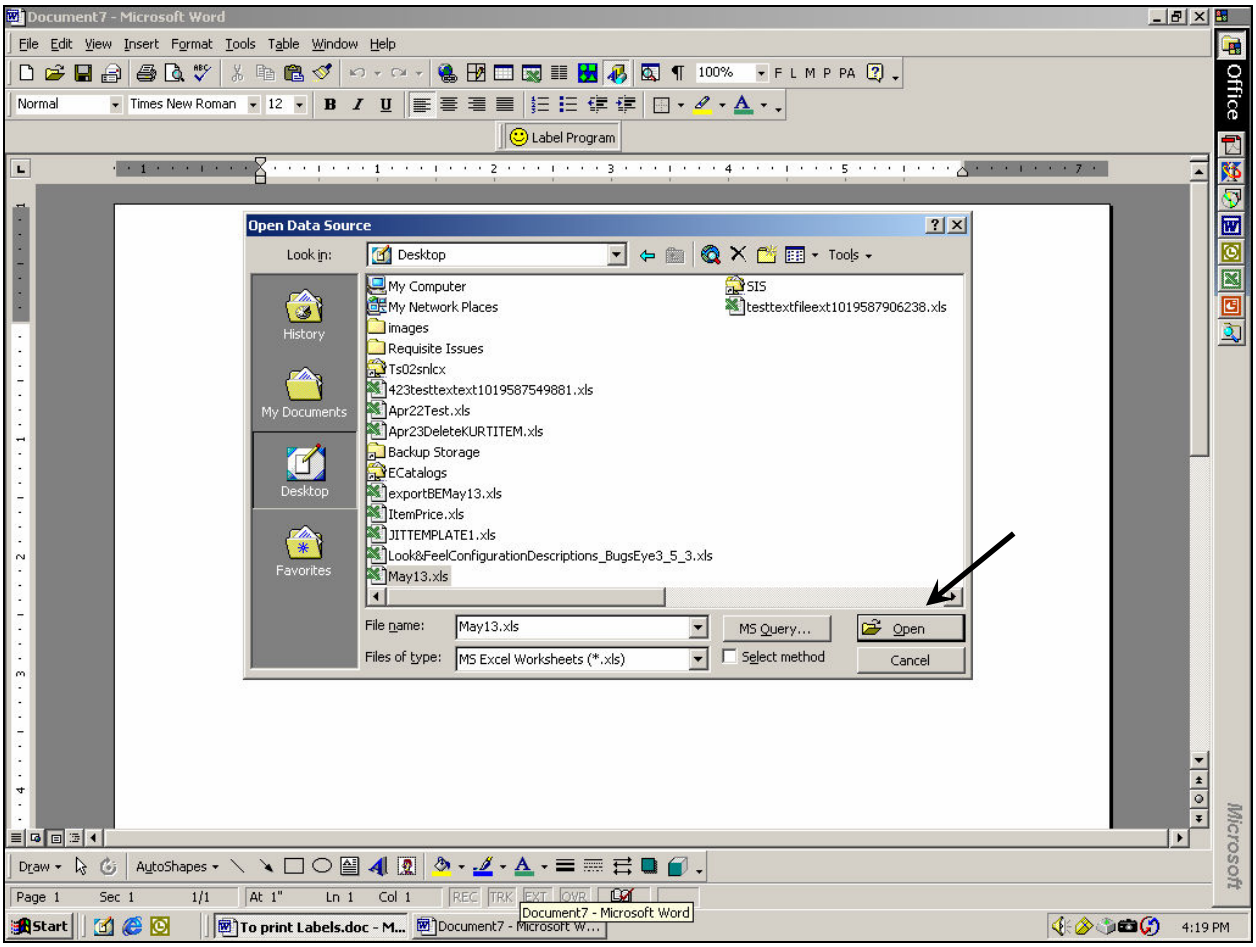


To print All Labels:

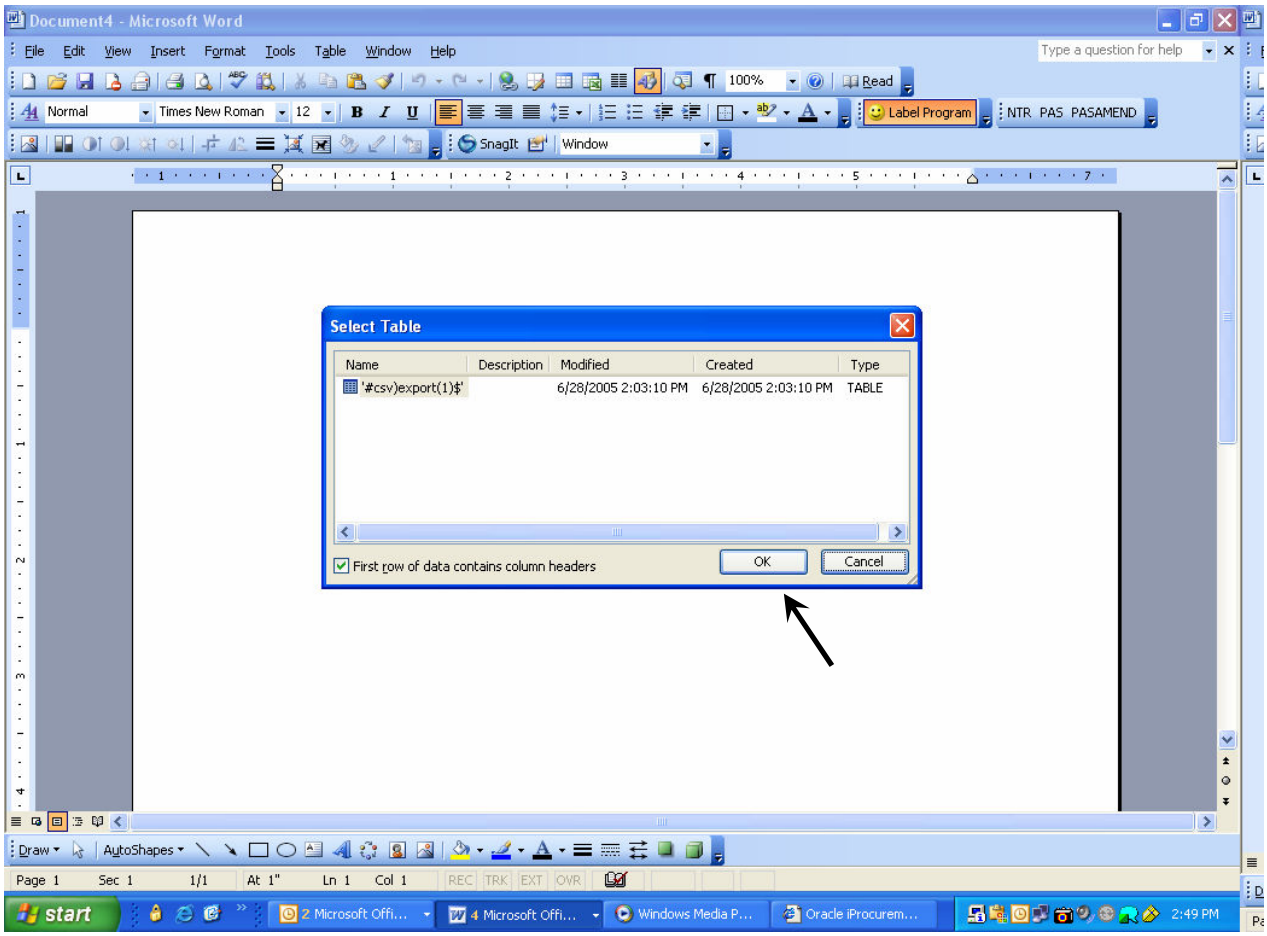
1. Select Print All Labels option.
2. Click **OK** button.

To print Specific Label:

1. Select Print Specific Label option.
2. Enter PO Number.
3. Click **OK** button.

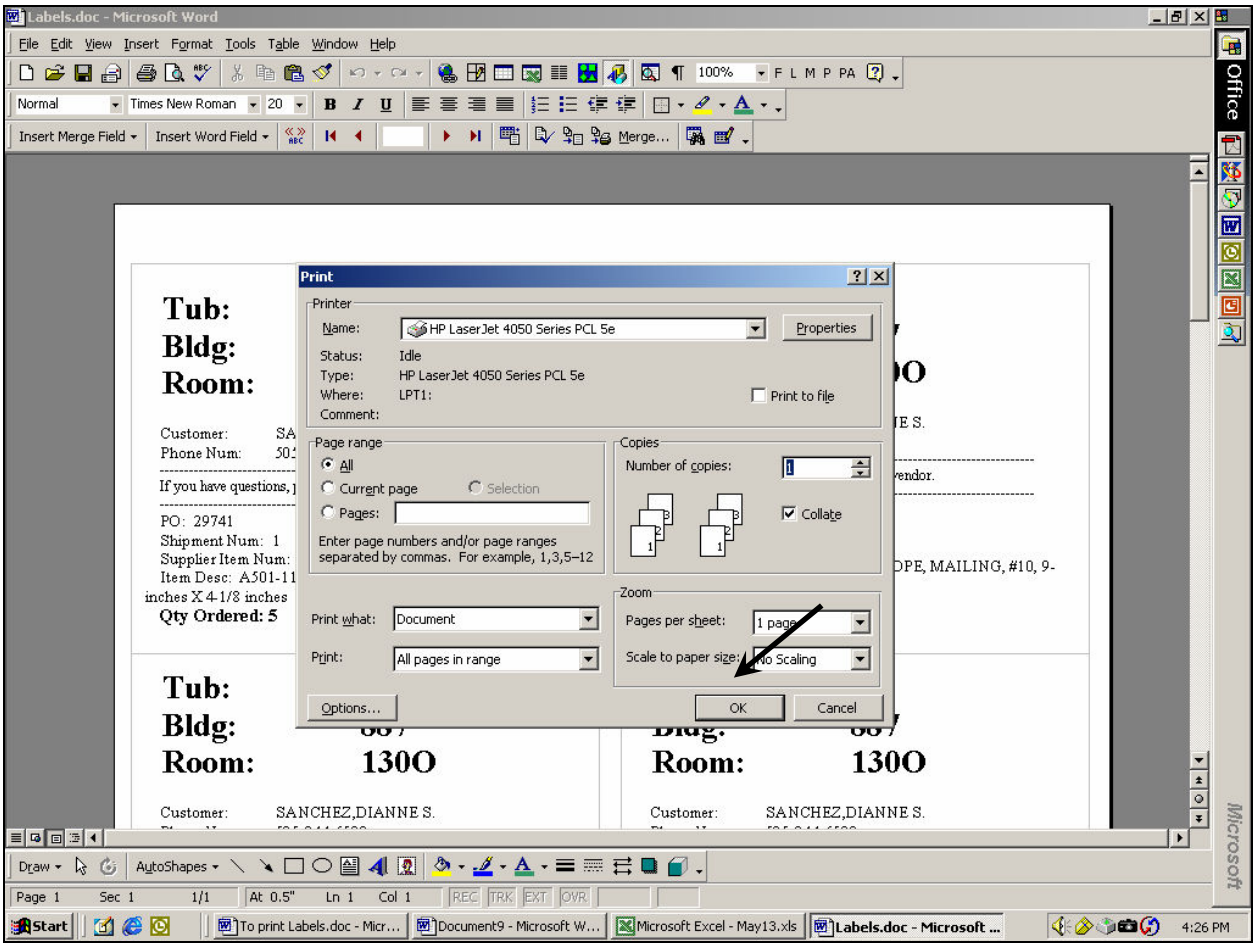


1. Navigate to your file (where you stored your file upon export).
2. Highlight file.
3. Verify File Type reflects MS Excel Worksheets (*.xls).
4. Click **Open** button.



Pop-up window will appear two (2) times.

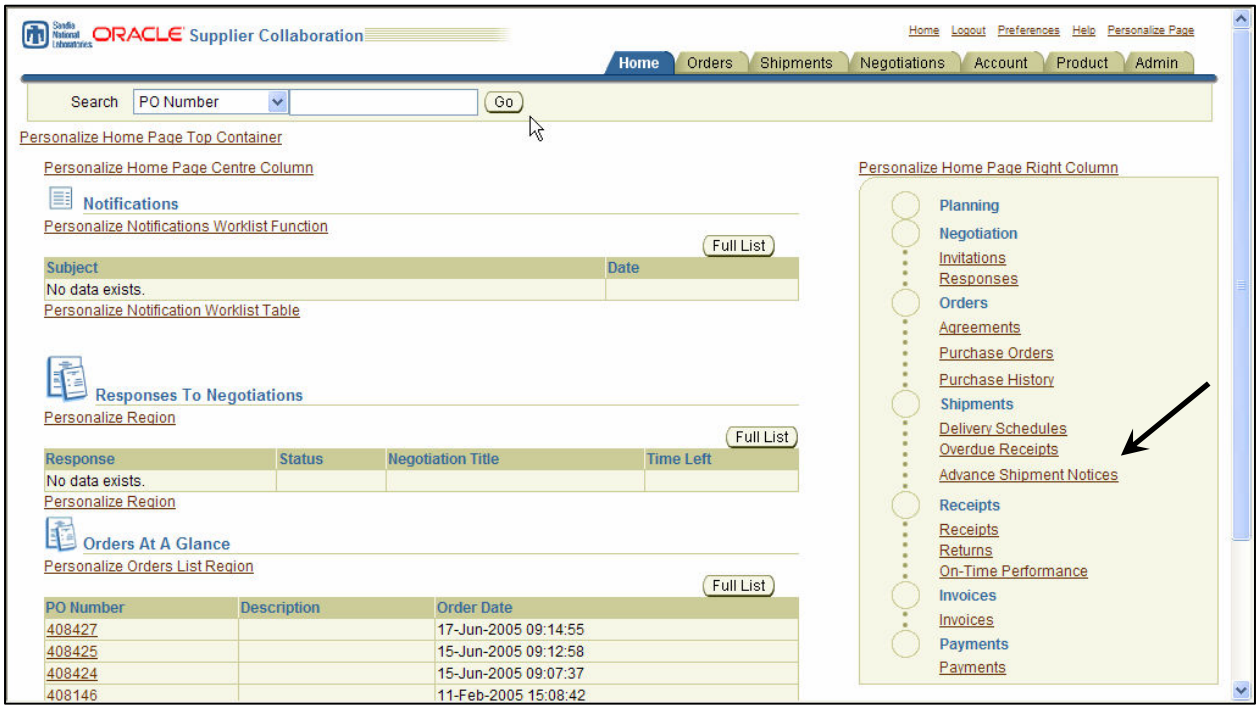
1. Click **OK** button to both boxes.



1. Click **OK** button (You have the option to print more than 1 copy by indicating quantity in Number of Copies field).
2. Close Microsoft Word application.

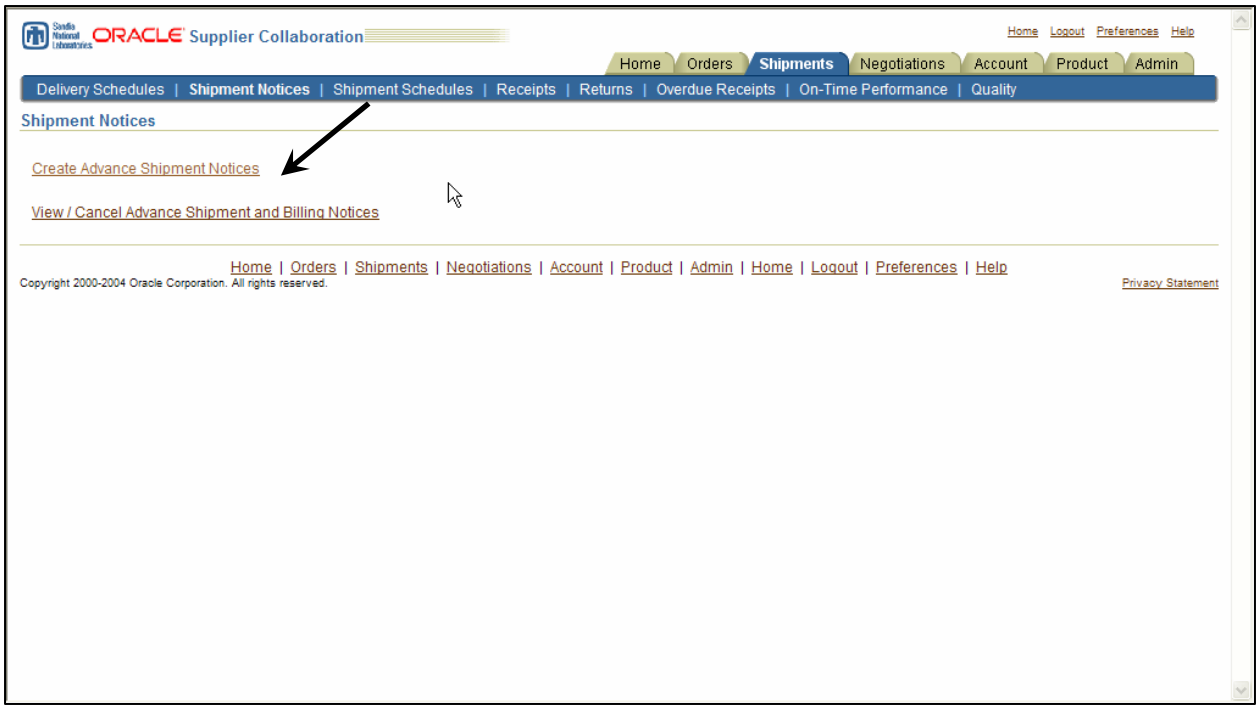
The labels will print and the label program will close.

CREATING ADVANCED SHIPMENT NOTICES (ASN)

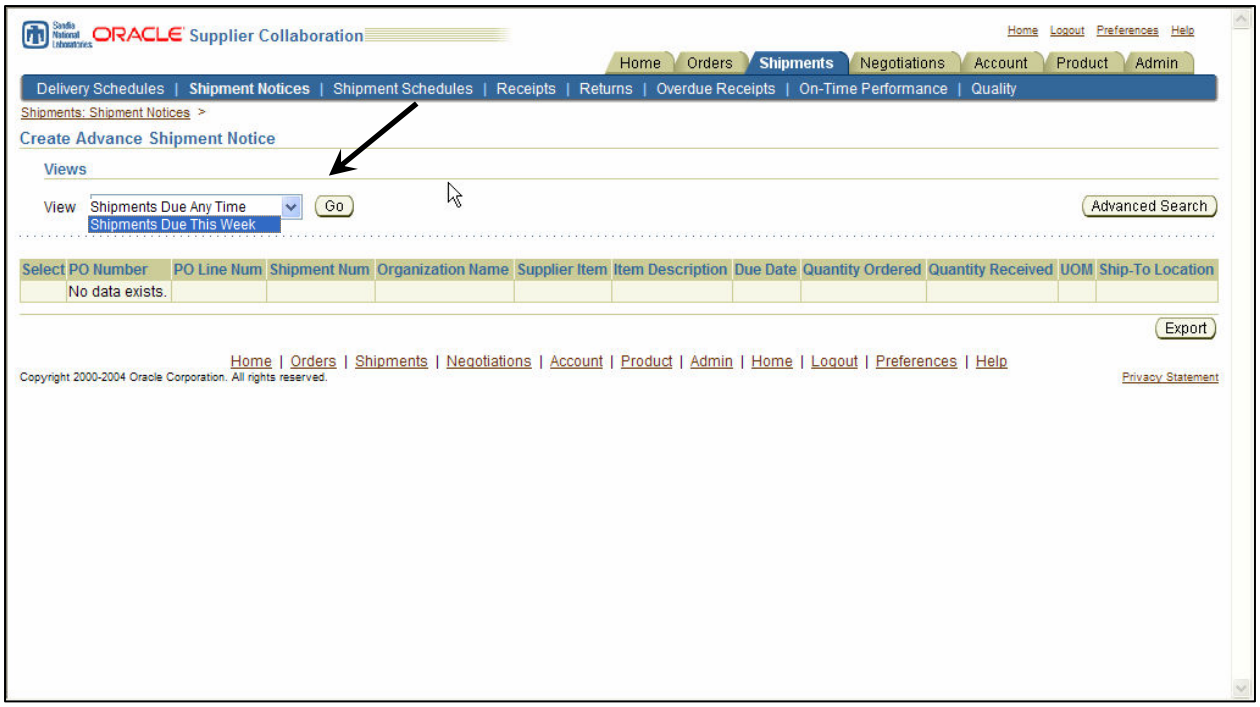


To create an Advanced Shipment Notice (ASN): (iSupplier Portal for suppliers>Home page).

1. Select **Advance Shipment Notice** under Shipments heading.



1. Click on **Create Advance Shipment Notices**.



1. At View, select appropriate option. Note: We recommend that you select **Shipments Due Any Time**.
2. Click on the **Go** button.

All orders that remain outstanding (including partials) will be displayed.

View Shipments Due Any Time Go Advanced Search

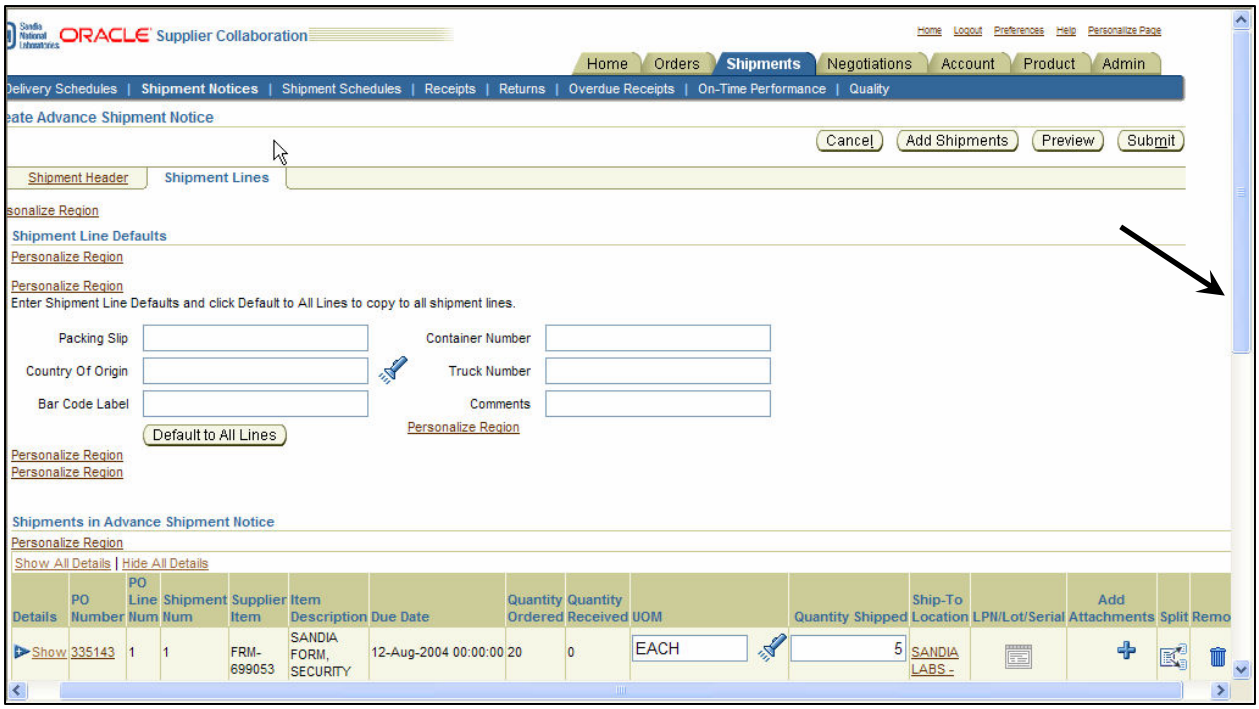
Personalize ASN Shipment Results

Select PO Shipments: Add To Shipment Notice Previous 1-25 Next 25

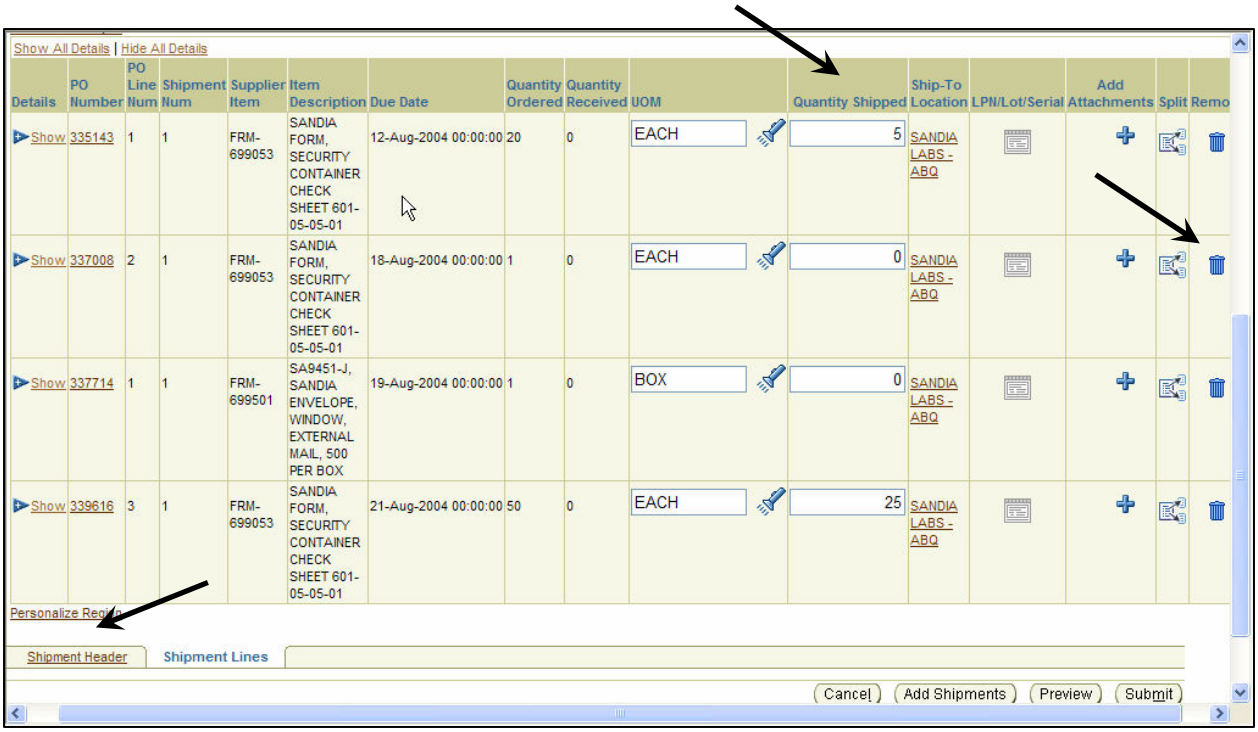
Select All | Select None

Select	PO Number	PO Line Num	Shipment Num	Organization Name	Supplier Item	Item Description	Due Date	Quantity Ordered	Quantity Received	UOM	Ship-To Location
☑	335143	1	1	SANDIA OPERATING UNIT	FRM-699053	SANDIA FORM, SECURITY CONTAINER CHECK SHEET 601-05-05-01	12-Aug-2004 00:00:00	20	0	EACH	SANDIA LABS - ABQ
☑	337008	2	1	SANDIA OPERATING UNIT	FRM-699053	SANDIA FORM, SECURITY CONTAINER CHECK SHEET 601-05-05-01	18-Aug-2004 00:00:00	1	0	EACH	SANDIA LABS - ABQ
☑	337714	1	1	SANDIA OPERATING UNIT	FRM-699501	SA9451-J, SANDIA ENVELOPE, WINDOW, EXTERNAL MAIL, 500 PER BOX	19-Aug-2004 00:00:00	1	0	BOX	SANDIA LABS - ABQ
☑	339616	3	1	SANDIA OPERATING UNIT	FRM-699053	SANDIA FORM, SECURITY CONTAINER CHECK SHEET 601-05-05-01	21-Aug-2004 00:00:00	50	0	EACH	SANDIA LABS - ABQ
☐	341396	1	1	SANDIA OPERATING UNIT	FRM-699053	SANDIA FORM, SECURITY CONTAINER CHECK SHEET 601-05-05-01	26-Aug-2004 00:00:00	24	0	EACH	SANDIA LABS - ABQ
☐	341710	1	1	SANDIA OPERATING UNIT	FRM-699053	SANDIA FORM, SECURITY CONTAINER CHECK SHEET 601-05-05-01	27-Aug-2004 00:00:00	25	0	EACH	SANDIA LABS - ABQ
☐	344291	2	1	SANDIA OPERATING UNIT	FRM-699053	SANDIA FORM, SECURITY CONTAINER CHECK SHEET 601-05-05-01	02-Sep-2004 00:00:00	25	0	EACH	SANDIA LABS - ABQ
☐	346969	2	1	SANDIA OPERATING UNIT	FRM-699053	SANDIA FORM, SECURITY CONTAINER CHECK SHEET 601-05-05-01	04-Sep-2004 00:00:00	20	0	EACH	SANDIA LABS - ABQ
☐	350401	1	1	SANDIA	FRM-	SANDIA ENVELOPE, MAIL SERVICE	15-Sep-2004 00:00:00	500	0	EACH	SANDIA

1. Select (by including a check mark in the select column) those orders you are sending to Receiving or Direct Delivering.
2. Click the **Add to Shipment Notice** button.



The above screen will appear, you must scroll down further to see the orders you selected from the previous screen.



Show All Details | Hide All Details

Details	PO Number	PO Line Num	Shipment Num	Supplier Item	Item Description	Due Date	Quantity Ordered	Quantity Received	UOM	Quantity Shipped	Ship-To Location	LPN/Lot/Serial	Add Attachments	Split	Remo
Show	335143	1	1	FRM-699053	SANDIA FORM, SECURITY CONTAINER CHECK SHEET 601-05-05-01	12-Aug-2004 00:00:00	20	0	EACH	5	SANDIA LABS - ABQ				
Show	337008	2	1	FRM-699053	SANDIA FORM, SECURITY CONTAINER CHECK SHEET 601-05-05-01	18-Aug-2004 00:00:00	1	0	EACH	0	SANDIA LABS - ABQ				
Show	337714	1	1	FRM-699501	SA9451-J, SANDIA ENVELOPE, WINDOW, EXTERNAL MAIL, 500 PER BOX	19-Aug-2004 00:00:00	1	0	BOX	0	SANDIA LABS - ABQ				
Show	339616	3	1	FRM-699053	SANDIA FORM, SECURITY CONTAINER CHECK SHEET 601-05-05-01	21-Aug-2004 00:00:00	50	0	EACH	25	SANDIA LABS - ABQ				

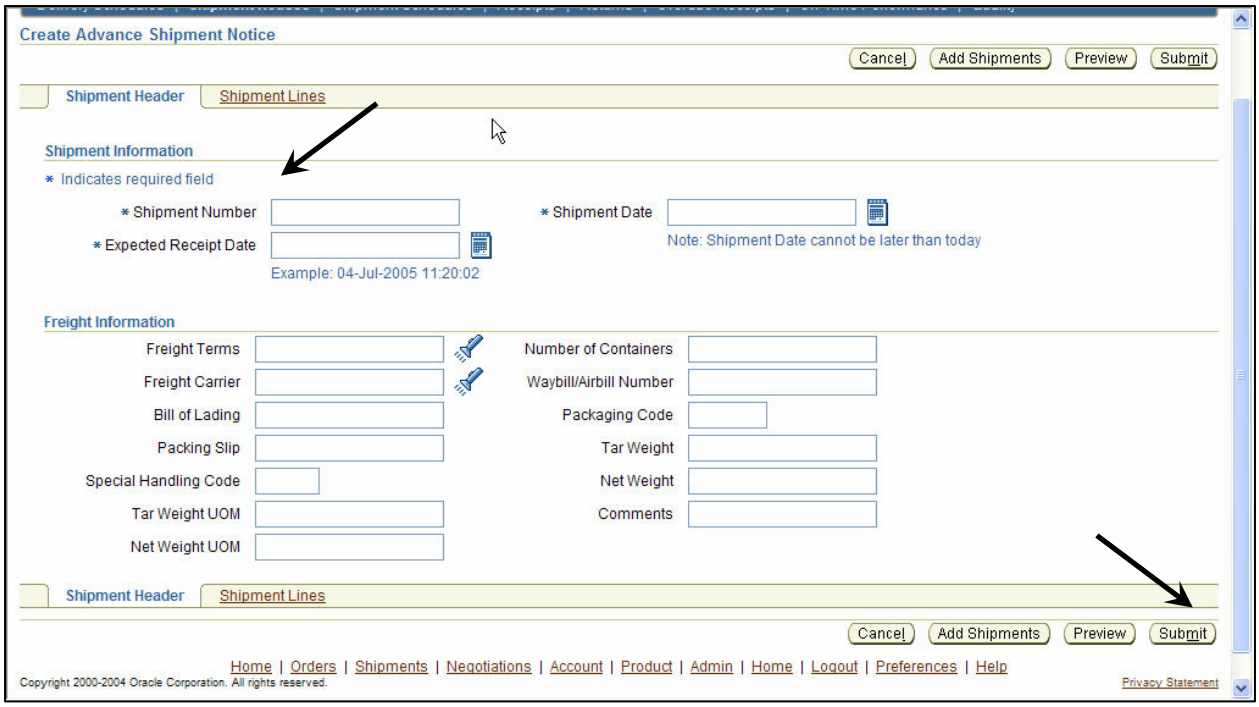
Personalize Regi

Shipment Header | Shipment Lines

Cancel | Add Shipments | Preview | Submit

This screen will recap what was selected on the previous screen.

1. Change **Quantity Shipped** to what you are actually sending/delivering **<u>IF</u>** different from what was ordered.
2. If you must remove a PO from the ASN, click on the **Trashcan** icon.
3. Click the **Shipment Header** button.



1. Enter **Shipment Number** i.e., ABC051402-01. Naming convention should include Prefix, Date, dash, Number. (If more than one shipment is sent in a given day, the shipment number would be ABC051402-02, etc.)
2. Enter **Shipment Date** (the date the shipment will be delivered to Receiving or direct delivered). Use the Calendar icon to select date.
3. Enter **Expected Receipt Date** (Generally the same date as the Shipment Date unless item(s) is shipped). Use the Calendar to select date.
4. If you would like to preview your ASN or print a summary for your records, click the **Preview** button and proceed to page 7.0.7.
5. If you are ready to submit the ASN, click the **Submit** button and proceed to page 7.0.8.

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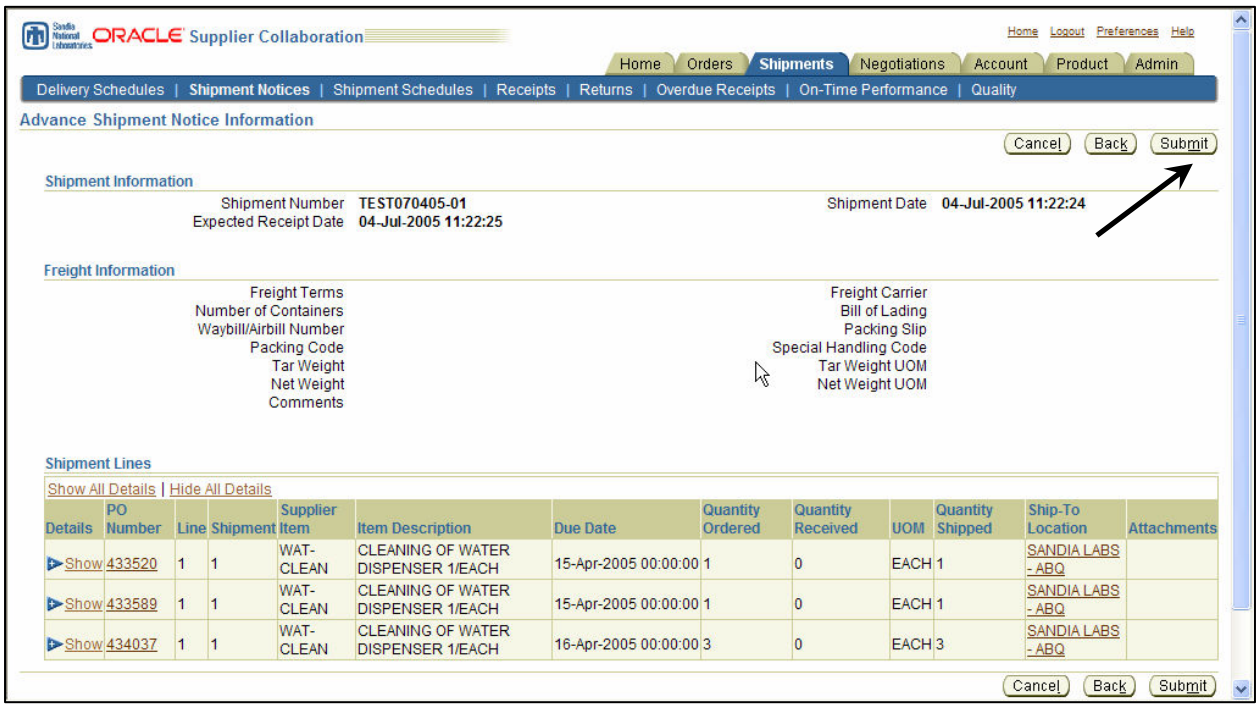
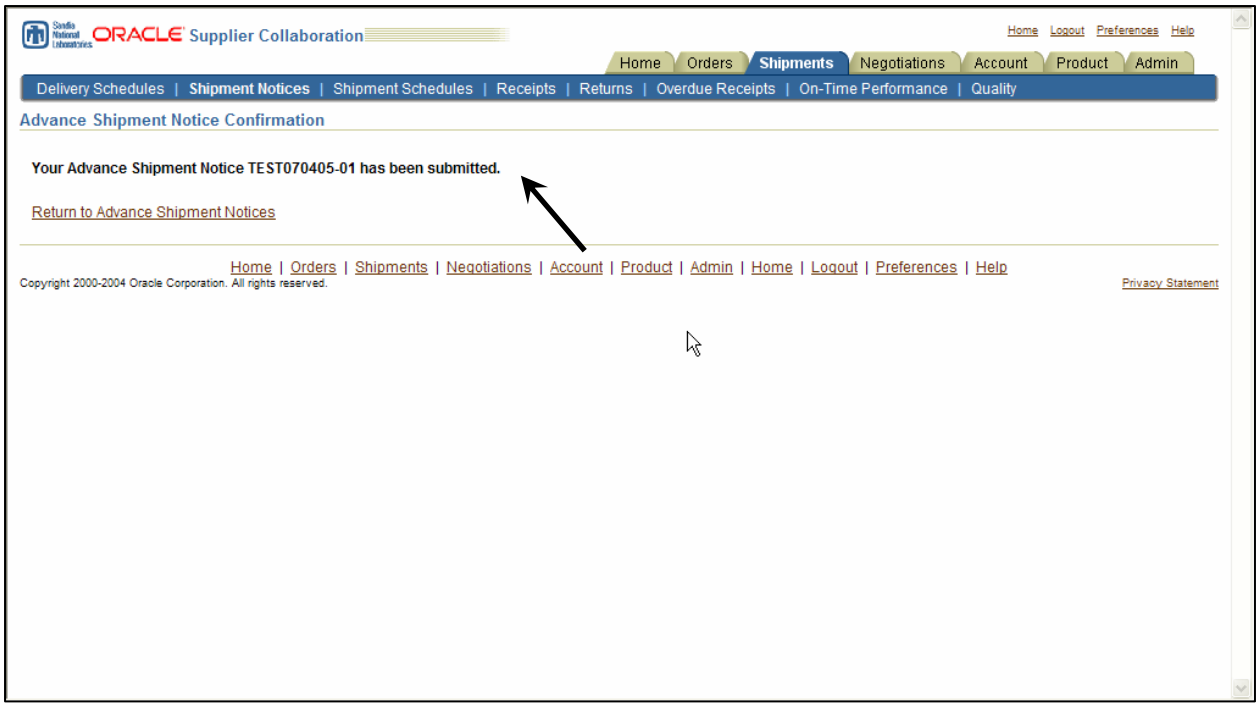


This screen will list your Advanced Shipment Notice information.

1. Click the **Submit** button at the bottom of the page.



Once you have click on the Submit link, you have successfully, submitted your ASN.

1. An e-mail will automatically be sent to Sandia Receiving to receive your ASN.
2. Once Sandia Receiving has received your ASN, you will get an automatic e-mail back with your receipt number.

The Receiving Processor is scheduled to run every 3 minutes

RETURNS/EXCHANGES/AMOUNT ADJUSTMENTS

PROCESSING A JIT RETURN

CRITERIA FOR RETURNING JIT ITEMS:

1. A return **must take place within 30 days of receipt** at Sandia and the items must be in re-sellable condition.
2. The item being returned **must have a unit value greater than $25 or** if there are multiple items from the same line the **extended price must be greater than $100**. Example: 50 folders at $2 each.

When the order is received, the customer must: identify, inspect, and count what is received.

<u>If an item needs to be returned, follow this process</u>:

1. Customer contacts the supplier to get an authorization for the return. If the item ordered was a special order there may be cases when it cannot be returned. This will need to be confirmed with the supplier.

2. Supplier completes Form SF6430-JR, JIT Returns, with all pertinent information.

3. Supplier sends a copy of Return form to Returns (returns @sandia.gov), Moves (moves@sandia.gov), the customer, and the Contract Administrator, via email. Customer will attach a copy of the form to the item(s) being returned. As soon as Logistics (moves@sandia.gov) receives the email notification from the supplier, a dispatch ticket is initiated to have the item(s) picked up from the customer.

4. IF ITEM WAS DIRECT DELIVERED BY JIT SUPPLIER, customer calls the supplier and schedules pickup. Supplier will email a copy of the completed form to their appropriate Contract Administrator for input into Oracle, noting that this was a direct delivery.

Exchange vs. Credit

Exchanges are made for defective items or for items that were incorrectly filled*. No money is exchanged between Sandia National Laboratories and the Supplier. This is a $0 transaction.

*For incorrectly filled items - exchanges will be made if the dollar value falls under the criteria for a return (unit price >$25.00 or extended price >$100.00). For example, a customer orders a paper cutter, but receives file folders; the customer calls the vendor to alert them of the error and to let them know the item is being returned; the supplier will complete the JIT Return Form, mark the EXCHANGE box and follow steps 3 & 4 above. If the item falls under the $25.00 unit value, the customer will keep the incorrect item, but the vendor will re-fill and re-send the correct item.

Credits are processed for items meeting the return criteria. The customer will contact the supplier for a return approval; supplier completes the JIT Return Form; then continues with steps 3 & 4 above. Sandia does not expect a replacement for the credit. Credits are processed through Oracle, exchanges are not.

Credits and Amount Adjustments

Credits are issued where there is no actual product being returned. All credits, excluding amount adjustments, are processed by the supplier's appropriate Contract Administrator (SCA). Example: an item is received damaged, the supplier instructs the customer to dispose of the damaged item, but needs to have the customer's project and task credited. The supplier will complete the JIT

Return Form and sends to the SCA via email, with a copy to the customer for their records. The SCA will process the credit in Oracle.

Amount Adjustments are processed when the pricing has changed after the item was delivered to Sandia. A JIT Amount Adjustment Form will be completed by the supplier and submitted to Accounts Payable (brabaca@sandia.gov) for processing. Example: the customer was charged $150.00 for an item, after the item was delivered to Sandia; the supplier receives a discount of $25.00, which is then passed on to Sandia. The supplier would submit an amount adjustment to AP.

SUMMARY:

If…..	Then complete…..	Email to……
Return (product return)	JIT Return Form	• moves@sandia.gov • Returns@sandia.gov • Customer • Contract Administrator
Exchange	JIT Return Form	• moves@sandia.gov • Returns@sandia.gov • Customer • Contract Administrator
Credit (no product return)	JIT Return Form	• Contract Administrator • Customer
Amount Adjustment	JIT Amount Adjustment Form	• brabaca@sandia.gov (Accounts Payable) • Contract Administrator • Customer

SF 6430-JR (1-2004)
Supersedes (12-2003) issue

JIT RETURNS

Supplier		**Prepared By**	
Supplier Contact Name			
Date Received by Customer		**Date Return Requested**	
Building		**Room**	

☐ CREDIT ☐ EXCHANGE

Deliver To Information (Requester's Name)	Phone	Return Material Authorization No.	Property Tagged*	Property Number
			☐Yes ☐No	

***All property tagged items must be reported to Barbara Bays at 284-3265, so that they may be removed from the Sandia property database.**

Returns must be made within 30 days of receipt. Each item returned must have a unit price greater than $25 or if unit price is under $25 the extended price must be over $100. The item returned must be in sellable condition and in the original manufacturing packaging.

If the items being returned do not meet the above outlined criteria, the items cannot be returned.

SUPPLIER: FILL OUT THE FORM THEN E-MAIL ONE COPY TO RETURNS@SANDIA.GOV AND MOVES@SANDIA.GOV. AND EMAIL ONE COPY TO THE CUSTOMER. *FOR CA RETURNS* (send e-mail to jjmoore@sandia.gov). FOR RETURNS WITH NO PRODUCT RETURNED, PLEASE EMAIL ONE COPY TO YOUR SANDIA CONTRACT ADMINISTRATOR.

CUSTOMER/EMPLOYEE: ATTACH ONE COPY OF THE FORM TO THE ITEMS BEING RETURNED TO BLDG. 957.

PO Number	Requisition Number	PO Line #	Quantity	Unit Price	Total Credit Amount (price x quantity)	Description and Item Number	Weight

Comments (Reason for return)

Exchanges: **Issued in the case of the requester receiving the wrong item. Exchange would be for an item of equal dollar value. Example of a reason for EXCHANGE is:**

- **Received the wrong item, exchange for ordered item.**
- **Defective Item**

Credits: **Issued when an item must be returned to the supplier for credit. DO NOT use the credit box if you are expecting an item to be returned to Sandia. Examples of reasons for CREDIT are:**

- **Item is not what customer wanted.**
- **Quantity of 5 was ordered, but wanted a quantity of 4.**
- **Item does not perform as well as expected or is not compatible with system.**

JIT AMOUNT ADJUSTMENT

Supplier Name			
Requestor's Name	**Telephone #**	**Bldg**	**Room**

SUPPLIER: Fill out the form then e-mail to Accounts Payable (brabaca@sandia.gov) or fax to 844-6504. Also send a copy to the requestor and to your JIT contract administrator.

PO NUMBER	REQUISITION NUMBER	PO LINE NUMBER	LINE ITEM DESCRIPTION AND ITEM NUMBER	PO LINE AMOUNT	ADJUSTMENT AMOUNT

Comments (Reason for Amount Adjustment)

INSTRUCTIONS FOR JIT VENDORS WITH BULKY (I.E., SKIDDED) ORDERS TO DELIVER:

1. Multiple boxes which are all intended for one delivery location (both building and room must be the same) can be delivered and remain skidded at the 957 warehouse.

2. **If items skidded are all to complete the same order and are the same items**,
   - Be sure there is at a minimum an indication on each side of the skid (inside the plastic wrap is fine) of the deliver to info. Placing a copy of the delivery label on a piece of paper on each side of the skid is sufficient. There should be an indication for the customer if more packages are required to fill the order. (See 5 below)
   - Skid will remain wrapped and be delivered as received.

3. **If items skidded are different orders or items, but to the same destination**,
   - Make sure there is clear destination information on the skid (a copy of the delivery labels), again on each side of the skid (inside the plastic wrap is fine).
   - Each different item should have a label on at least one of the boxes for the order that's on the skid.
   - Skid will remain wrapped and be delivered as received.

4. **If items cannot remain skidded (multiple orders to multiple destinations),**
   - The delivery skid will be burst at the dock and individual boxes will be run down the line.
   - Please be sure that each box contains a delivery label

5. **Multiple packages are required to fill one order**
   - Each delivery label that fulfills the same order should read exactly the same, except for the 1 of __, 2 of __ , etc., designation handwritten in.

6. If an order is a partial delivery (customer ordered 10, but you're bringing 3 and 7 are on backorder), be sure to change the delivery amount on your ASN and write on the label the actual delivery amount.

If there are questions regarding these instructions, please contact the Receiving Supervisor, Jan Wallner at 844-5741.
Sandia National Laboratories Receiving
Organization 10263-1
08/04/04

PROPERTY MANAGEMENT

It is important that all JIT Contractors be familiar with Sandia's property requirements referenced in this document. Refresher training will be required to be completed annually by all JIT Contractors.

Sandia Property Contacts

For property tagging questions, property stickers, etc., please contact:

- Barbara Bays (284-3265) babays@sandia.gov
- Christine Perez (284-1505) mcperez@sandia.gov

Property Tagging

Purpose of Tagging

- Under the prime contract with Lockheed Martin and DOE, Sandia National Laboratories is required to establish, administer, and properly maintain an approved property management system of accounting for and control, utilization, maintenance, repair, protection, preservation, and disposition of Government property in its possession.
- In order for DOE approval, Sandia's property management system must provide for acquisition, accountability, utilization, and disposal of Government personal property.

What Property Items Need to be Tagged

- Firearms and transceivers (two-way radios) regardless of cost.
- **Computers**, cameras, camcorders, portable tools with an acquisition cost of **$1000 or more** (computers under $1000 should not be tagged).
- All property items including printers or monitors with an acquisition cost of **$5000** or more each (printers/monitors under $5000 should not be tagged).
- If there is any doubt, please contact Barbara Bays (284-3265) for clarification.

Funding (S# vs. R#)

- An "S" or "R" will print out on the vendor label. Tags should be applied accordingly.

Mixed funding

- Occasionally, an organization will mix Sandia funding and Reimbursable funding to purchase an asset. **Until further notice, apply an S#** to the property item when the funding is mixed.

Our (Sandia Property Management) Requirements

- Data we need in order to enter an asset correctly into our Oracle Fixed Asset database:

✓ Tag # (S or R)
✓ Name/Requester
✓ Quantity
✓ Brief Description (is it a computer or server, etc.)

- ✓ Description is extremely important. Many times we receive only the part number (or catalog number) of an item & it's difficult to tell what it is which leads to database inaccuracies. A brief description is needed.

✓ Serial #
✓ Model #
✓ Cost

<u>Returned Items</u>

- A copy of the credit/return slip needs to be sent to Barbara Bays, MS1118 (denoting S# or R#) so that we can decontrol the asset and keep our database accurate.
- If an item is exchanged for another, a copy of the exchange slip (denoting S# or R#) needs to be sent to Barbara Bays, MS1118.
- These items can be e-mailed to babays@sandia.gov

2006 ANNUAL PROPERTY MANAGEMENT REFRESHER TRAINING FOR JUST-IN-TIME (JIT) CONTRACTORS

All JIT Contract Coordinators must review the attached Property Management annual refresher training document to reinforce Sandia's property requirements. The JIT Contract Coordinator is responsible for ensuring that JIT Contractor employees that perform property tagging duties review the attached Property Management refresher training document; however, any JIT Contractor employee may review the information. It is important that all JIT Contractors be familiar with this information. This information will reinforce and update awareness of JIT Contractors' responsibilities for tagging Sandia property.

If you have any questions regarding the attached information, contact your Sandia Contracting Representative (SCR) or Sandia Contract Administrator (SCA) immediately for clarification.

The following JIT Contractor employees have reviewed and understand the Property Management Refresher Training information:

PRINTED NAME	SIGNATURE	DATE

<u>Note to Contractor</u>: Return original form to your SCR by June 30, 2006.

COUNTER ORDER PICKUPS

JIT Suppliers can process counter order pickups only if their contract terms allow them. All Sandia employees who pick up an orders from a JIT Supplier will be required to provide proof they are an employee of Sandia National Laboratory. A Sandia Employee Identification Card is the only form of identification that a JIT Supplier may accept for pick up of a JIT item. The Sandia Employee Identification Cards are available at the Sandia Badge Office and will only be issued to direct employees of Sandia National Laboratories. Contractors, subcontractors, sub-tier suppliers and others are not eligible to receive a Sandia Employee Identification Card. Sandia Security Clearance Badges may not be used for this purpose. Questions regarding the Sandia Employee Identification Cards can be referred to the Sandia Badge Office Helpline (505) 284-3103.

Suppliers must follow complete the Counter Order Pickup Log (see below) and submit the completed log to your Sandia Contracting Representative (SCR) at the end of each month. An electronic version of the form will be provided by your SCR. Suppliers are responsible for completing the shaded fields of the form. SCRs may request supporting counter order backup documentation at any time.

Questions regarding this process should be directed to your SCR.

SANDIA NATIONAL LABORATORIES
COUNTER ORDER PICKUP LOG

Revised 6/21/05

CONTRACTOR: _____
AGREEMENT NUMBER: _____
_____ 2005

Instructions: The JIT Contractor is responsible for completing the gray section of this form. The JIT Contractor must require Sandia employees to show their Sandia Employee Identification Card before a counter order can be picked up; counter orders cannot be filled without proper identification. (Note: Sandia Contractor Employees are not authorized to pick up counter orders.) The Sandia employee must sign for all counter pickup orders.

DATE	SANDIA EMPLOYEE	SANDIA EMPLOYEE ID CARD NUMBER	PO NUMBER	SANDIA EMPLOYEE SIGNATURE

Note to Contractor: Original Counter Pickup Logs must be provided to your Sandia Contracting Representative (SCR) at the end of each month. Questions regarding this process should be directed to your SCR.

QUESTIONABLE TRANSACTIONS

If JIT Contractors suspect waste, fraud, or abuse, they should immediately contact Sandia's Corporate Investigations Office at 845-9900 and the assigned Sandia Contracting Representative (SCR).

ARMS LENGTH BUSINESS TRANSACTIONS

JIT Suppliers are prohibited from designating Sandia Requesters as representatives/purchasing agents of the JIT Suppliers' companies for the purposes of conducting business. Any such action may result in a conflict of interest and/or possible termination of their JIT agreement. If you have any questions, contact the assigned Sandia Contracting Representative (SCR).