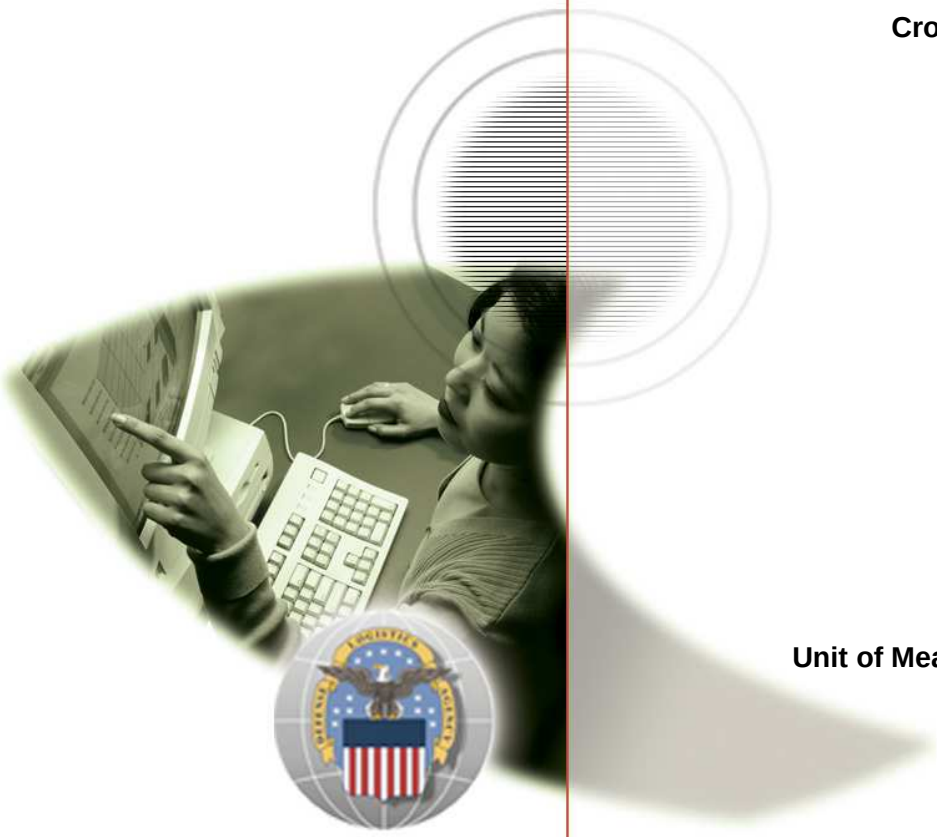
EBS enterprise business systems

delivering 21st century logistics



Cross Process Job Aid

Unit of Measure Management

Effective December 1, 2009

Table of Contents

Transaction or activity overview

Purpose, Business Scenario, Audience……..3

Definitions/Terminology/References……4

Business Scenario or Business Rules
Steps……5

Transaction MM14, Display Planned Changes (Future Changes)……6

Transaction MM19, Material Master Material Display- Display at Key Date…7

Excerpt FLIS TIR/Management /Phrase and Future Management /Phrase 11

Transaction MM03 or ZSM_MATINFO/Sales: sales org 1……12

Transaction MM03 or ZSM_MATINFO/Purchasing Tab……..13

Transaction MM03 or ZSM_MATINFO/Additional Data/
Unit of Measure Tab……. ……..……14

Transaction MM03 or ZSM_MATINFO/Additional Data/
Internal Comment Tab……..……14

Transaction MM03 or ZSM_MATINFO/Additional Data/
Purchase Order Text……..……15

Transaction VK13, Display Condition (Price Verification)……16

Transaction MMBE, Stock Overview (Authorized Units of Measure)……..18

Job Aid Title

Transaction or Activity Overview

Purpose:

- The purpose of this job aid is to provide guidance for the management of Unit of Measure.
- Upon coordination with all users as stated in DOD/DLA policy guidance

Business Scenario:

- To ensure that all Enterprise Business System (EBS) Unit of Measure fields are accurate to describe the material.

Audience:

- Packaging Specialist
- Product Specialist
- Finance
- Planning
- Order Fulfillment
- Business Process Analyst (BPA)
- Cataloging
- Procurement

Definitions/Terminology/References

In EBS there are several units of measure that can be used; however, the Base Unit of Measure (BUoM) is the only one mandatory, since it is needed to create a material. The following terms are provided for clarification.

BASE UNIT OF MEASURE (BUoM): d. This is the smallest/lowest unit for which the material shall be managed. The BUoM can't be changed once established in EBS!

Primary Location: Basic Data 1
Primary User: All

Note: The following data elements are reviewed and could change if the Sales Unit needs to change.

SALES UNIT (SU): The unit of measure in which a material is issued to the customer when different from the Base Unit. The Federal Logistics Information System (FLIS) Unit of Issue (UI) populates the EBS Sales Unit field. SU shall only be changed by DSC authorized personnel via form 1359 and E-CAT submission to DLIS. **DO NOT** manually update EBS Sales Unit field as it will automatically populate once DLIS processes the E-CAT transaction.

Primary Location: Sales: Sales Org 1
Primary User: All

ORDER UNIT (OU): The OU is the unit of measure a material may be/is procured and may be different from the Base Unit and/or the Sales Unit. **NOTE:** When it is necessary to procure the material in a Unit of Issue other than the BUoM or SU update of the OU is the responsibilities of the T/Q BPA contact them to update the OU accordingly.

Primary Location: Purchasing
Primary User: Planning and Purchasing

(EBS) Unit of Issue: Unit in which the **material** is issued from the warehouse. In Inventory Management, the unit of issue is for goods issues, transfer postings, other goods receipts, and reservations. This UI is also plant specific

Primary Location: Plant Data/Stor.1
Primary User: All

(FLIS) Unit of Issue: A code indicating the physical measurement, the count or when neither is applicable, the container, or shape of an item for purposes or requisitioning by, and issue to, the end-user, and is that element of management data to which the unit price is ascribed.

Primary Location: Total Item Record (TIR) Management Data
Primary User: All

Quantity Unit Pack (QUP): The code indicating the number of units of issue in the unit package as established by the managing activity. The QUP is used on definitive units of issue and may represent an intermediate pack.

(EBS) Primary Location: Classification/Packaging
(FLIS) Primary Location: TIR Management Data

Quantitative Expression (QE): An expression which specifies the content (decimal locator, quantity and unit of measurement) of a non-definitive unit of issue assigned to the material. When the UI is non-definitive the QUP will always be 1 because the QE spells out the Quantity and Unit of Measure that define the non-definitive unit of issue.

(EBS) Primary Location: Additional Data/Units of Measure
(FLIS) Primary Location: TIR Phrase Code Data

Unit of Issue Conversion Factor: The quantitative value by which the proper quantity per unit of issue must be multiplied to arrive at an equal quantity of the new unit of issue.

Primary Location: Internal to FLIS

Additional data/ Unit of Measure Tab

References

DLA Technical-Quality Support Policy and Procedures Deskbook, Appendix B23
FLIS Procedures Manual 4100.39-M
Volume 10 Tables 52, Phrase Codes
Table 53, Unit of Issue
Table 56, Quantity Unit Pack

Table 79, Unit of Issue Conversion Factors
Table 81, Units of Measure Designation for Quantitative Expression
Procurement Job Aid, Change Purchase Info Record

Business Scenario or Business Rules

- When it becomes necessary to change Sales Unit.
- When it becomes necessary to change the Order Unit and it is different from the Sales Unit.
- When it becomes necessary to change the QUP.
- Validation of Sales Unit Change
- Validation of Price Change
- Stock Overview quantity validation.

Steps

Sales Unit change-When the material needs to be issued in a manner other than the recorded BUoM.

Review and validate request for change If valid, prepare DLA Form 1359 Request for Unit of Issue Change

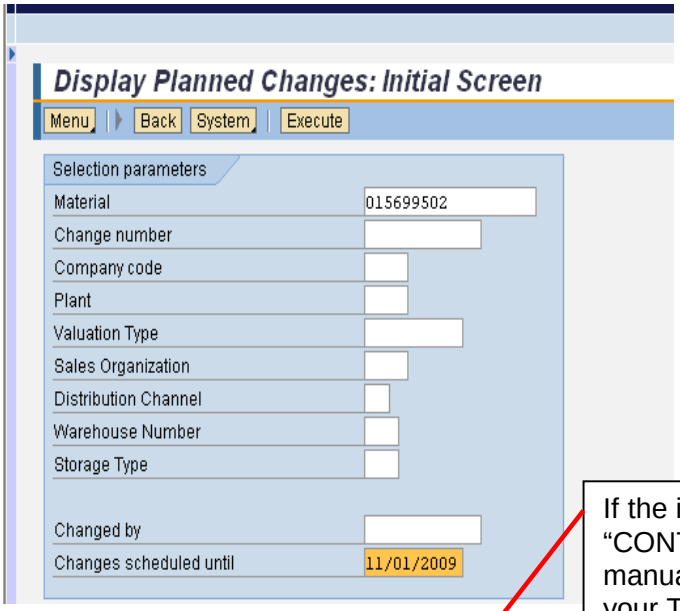
Instructions are found in the DLA Technical-Quality Support Policy and Procedures Deskbook, Appendix B23
ALL Sales Unit updates are accomplished via an effective dated cataloging transaction initiated from FLIS. (Note: To maintain data integrity; this process is done to ensure synchronization between EBS, FLIS and DSS.)
Once cataloging action is processed changes can be viewed using EBS transactions MM14 and MM19.

MM14 will display the planned changes in a table format as a result of future effective dated cataloging actions.

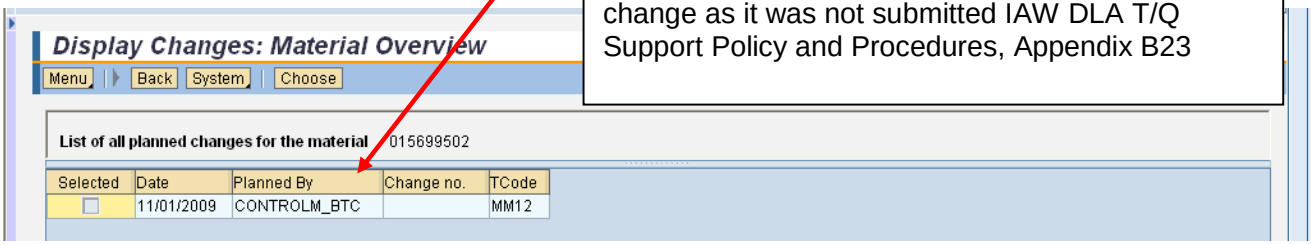
MM19 will graphically display what Sales Org 1 will look like on or after the effective date.

MM14-Display Planned (Future Effective Dated) Changes

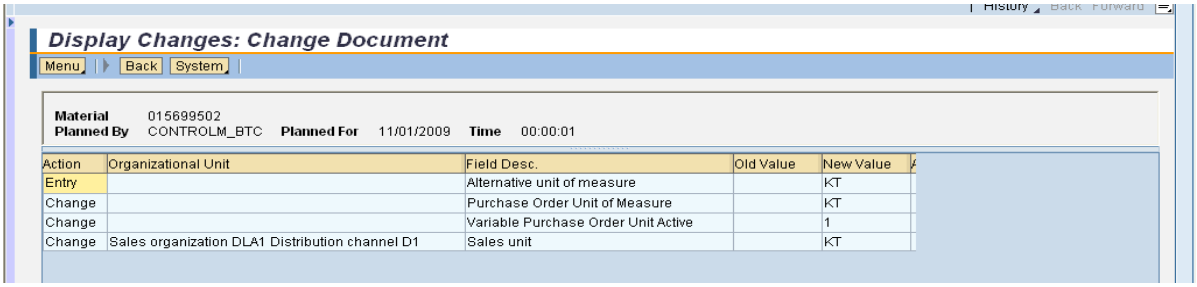
Select Execute



If the identifier in the "Planned By" field is other than "CONTROLM_BTC" then the change was input manually. If the change is for Unit of Issue contact your T/Q BPA to research to research the future change as it was not submitted IAW DLA T/Q Support Policy and Procedures, Appendix B23



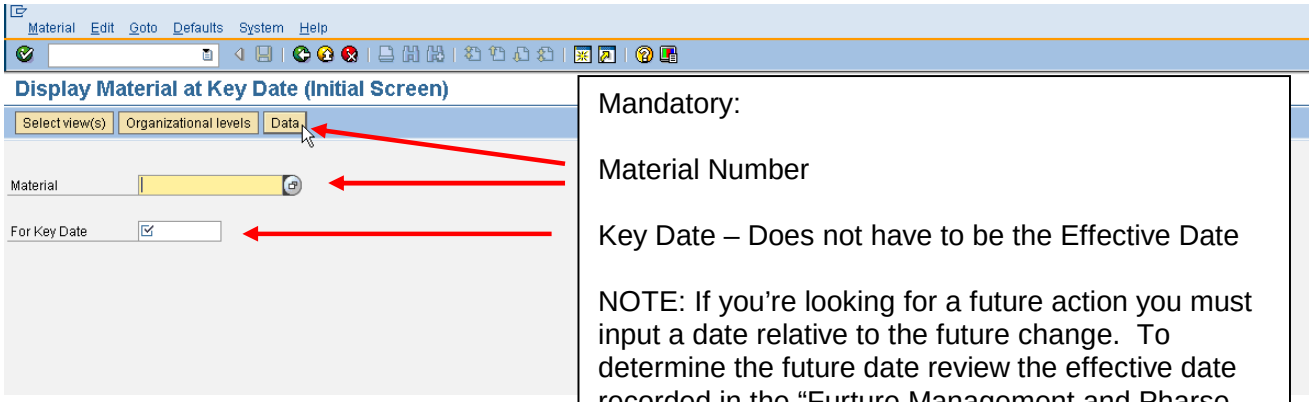
Double click on Planned for date and the actual information can be seen



Note: All FLIS changes will be effective on the <u>first day</u> of the month. First day of the month from here on will be described as the Effective Date or EFFDT.

This can be seen as follows:

MM19 -Display material Key Date (This transaction shows past and future of the Material Master)



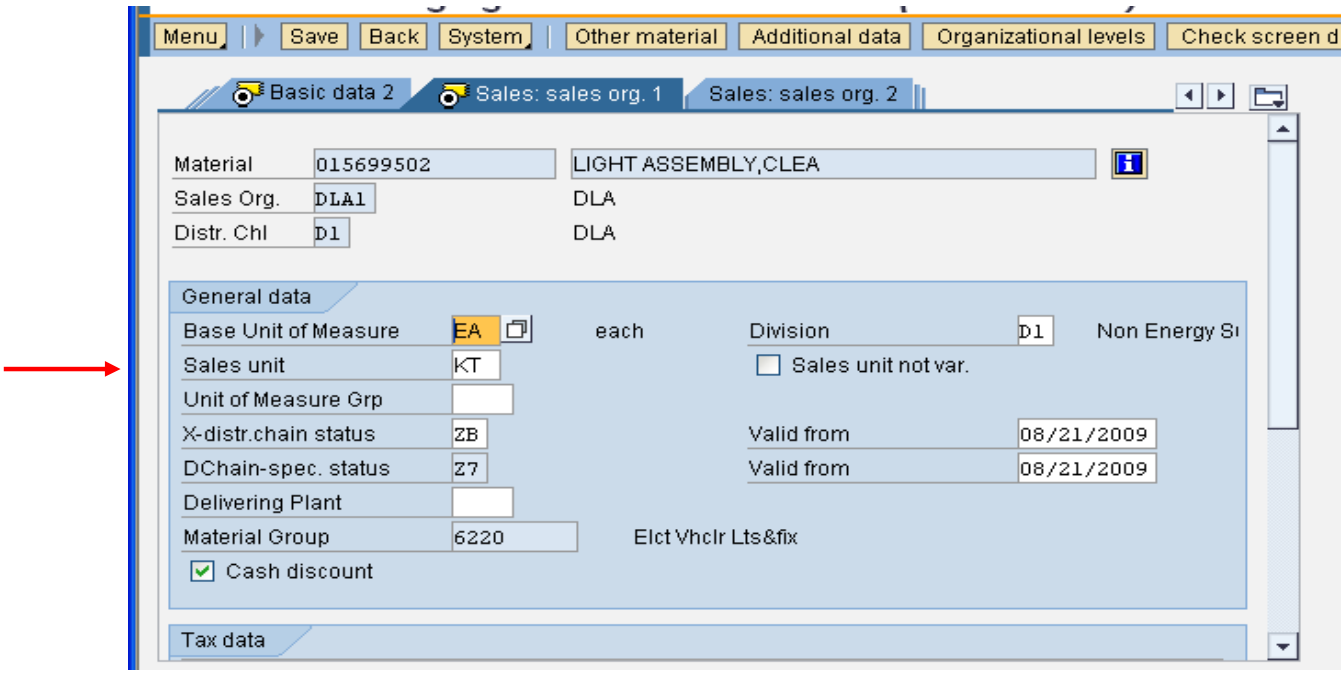
Mandatory:

Material Number

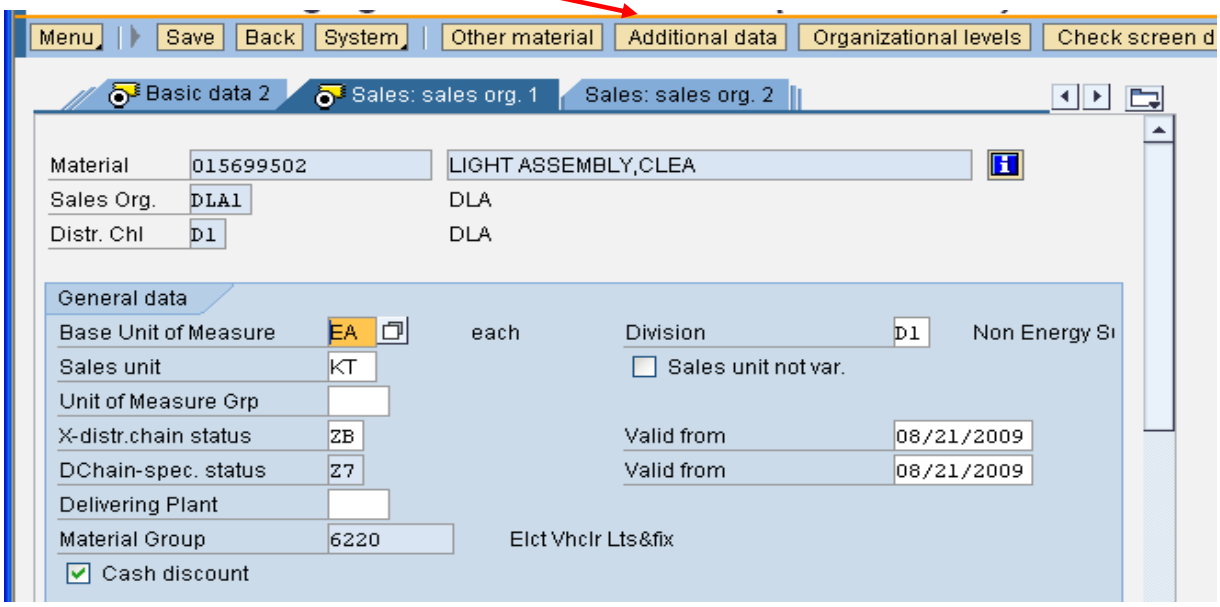
Key Date – Does not have to be the Effective Date

NOTE: If you're looking for a future action you must input a date relative to the future change. To determine the future date review the effective date recorded in the "Furture Management and Pharse Data of the FLIS TIR.

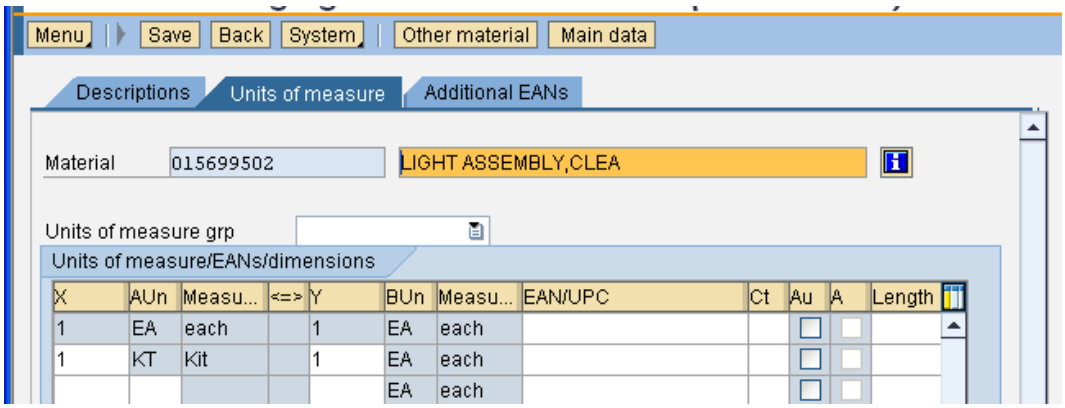
Select Sales: sales org 1 Tab



Select Additional Data Tab



Select Unit of Measure



In this example, the Base unit is Each (EA) and a FLIS unit of Issue change was made to KIT (KT). Therefore, the KT now becomes the unit seen in FLIS as the Unit of Issue and is the unit in which material will be sold. There must be a conversion factor to relate the KT to the Base Unit of EA. The system will create the conversion factor based upon the data in the FLIS transaction and post it to the Units of Measure Tab under Additional Data.

Note: Once the effective date is met, the system will automatically insert the new sales unit and conversion factor into the proper fields in the material master.

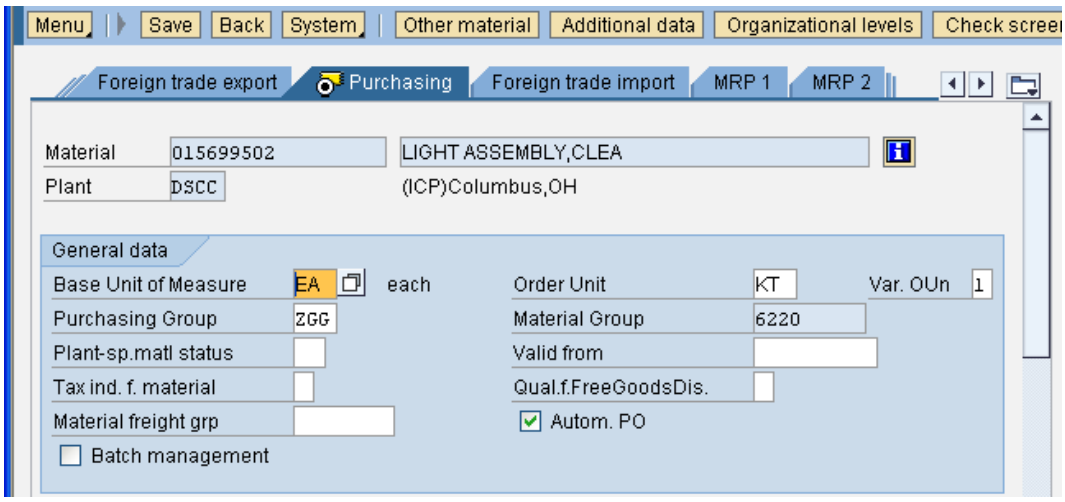
*Prior to the effective date you can view the changes using transaction MM19, on or after the effective date you can view the changes in MM03 or ZSM_MATINFO.

Order Unit is different from Sales Unit- When the material needs to be procured in a manner other than the Sales Unit.

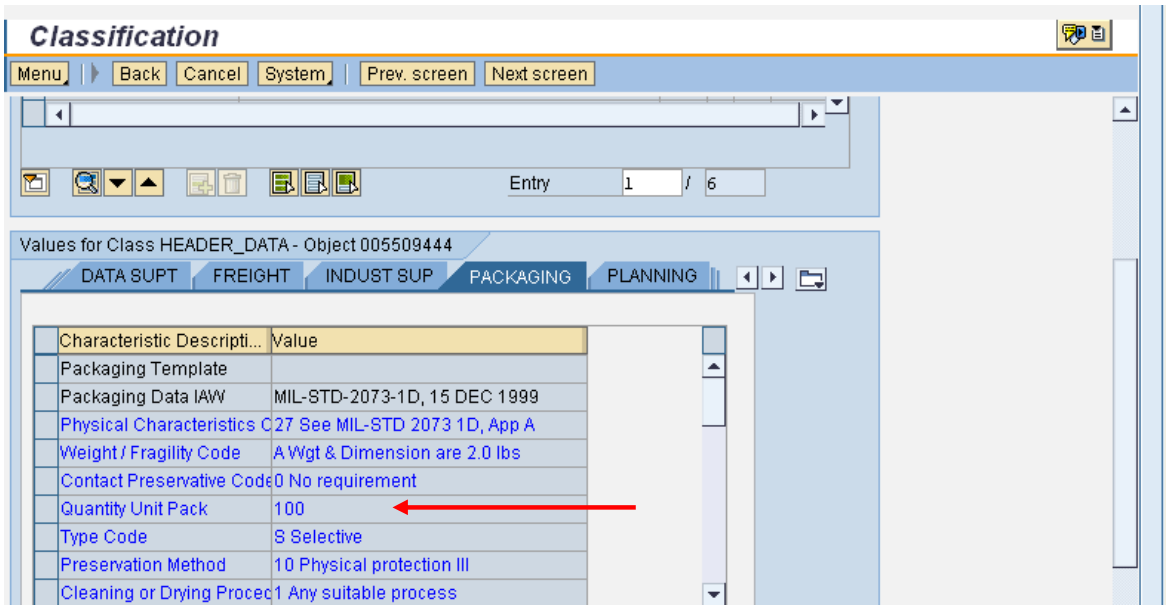
If a procurement action is in process, contact TQ BPA for assistance.
Prior to a procurement action, refer to Appendix B23 for assistance
For Order Unit updates please ensure Order Unit conversion factors are loaded in the Units of Measure tab.

*If further assistance is needed regarding conversion, please contact TQ BPA.

MM19



QUP changes-If the QUP needs to be updated the responsible packaging personnel shall update the EBS 3 position QUP field in the Classification/Packaging tab and submit a cataloging request to update the FLIS 1 position QUP field. For additional instruction please refer to Appendix B23 available at. https://headquarters.dla.mil/j-3/j-334/ESTS-techsuppdeskbook.asp



Validation of Sales Unit Change
Review Materials
Review FLIS TIR - Management/Phrase Sections line coded with MOE Code" DS" as highlighted below

Management (Current)
EFF-DT MOE AAC SOS UI UI PRICE QUP CIIC SL REP MGT-CTL USC

2009152	DA	D	SMS	RO	$13.25	1	U	0	Z	J2200X-	A
2009152	DF	D	SMS	RO	$13.25	1	U	0	N	SF9---N	F
2009152	DM	D	SMS	RO	$13.25	1	U	0	Z	15B2---	M
2009152	DN	D	SMS	RO	$13.25	1	U	0		9B-----	N
2009152	DS	D	SMS	RO	$13.25	1	U	0	N	N-	I

Management Future
FUTURE DATA EFF-DT: 2009274 PRI-DIC: ORI-DIC:LCM ORG-ACTY: 9T

EFF-DT	MOE	AAC	SOS	UI	UI-PRICE	QUP	CIIC	SL	REP	MGT-CTL	USC
2009274	DA	D	SMS	RO	$2.07	1	U	0	Z	J2200X-	A
2009274	DF	D	SMS	RO	$2.07	1	U	0	N	SF9---N	F
2009274	DS	D	SMS	RO	$2.07	1	U	0	N	N-	I
2009274	DN	D	SMS	RO	$2.07	1	U	0		9B-----	N
2009274	DM	D	SMS	RO	$2.07	1	U	0	Z	15B2---	M

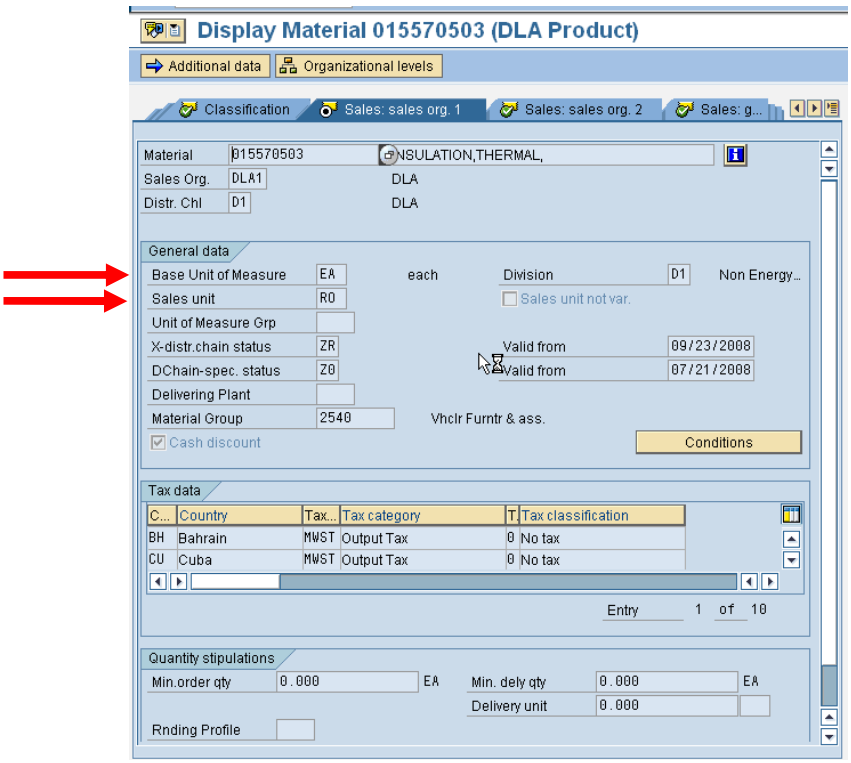
Phrase (Current)

MOE	USC	PHRS-CD	PHRASE-CODE-DATA	ORDER-OF-USE	JUMP-TO-CODE	QPA	UM
DA	A	K	00000000050FT			0	
DF	F	K	00000000050FT			0	
DM	M	4	5640015552892			0	
DM	M	K	00000000050FT			0	
DN	N	K	00000000050FT			0	
DS	I	K	00000000050FT			0	

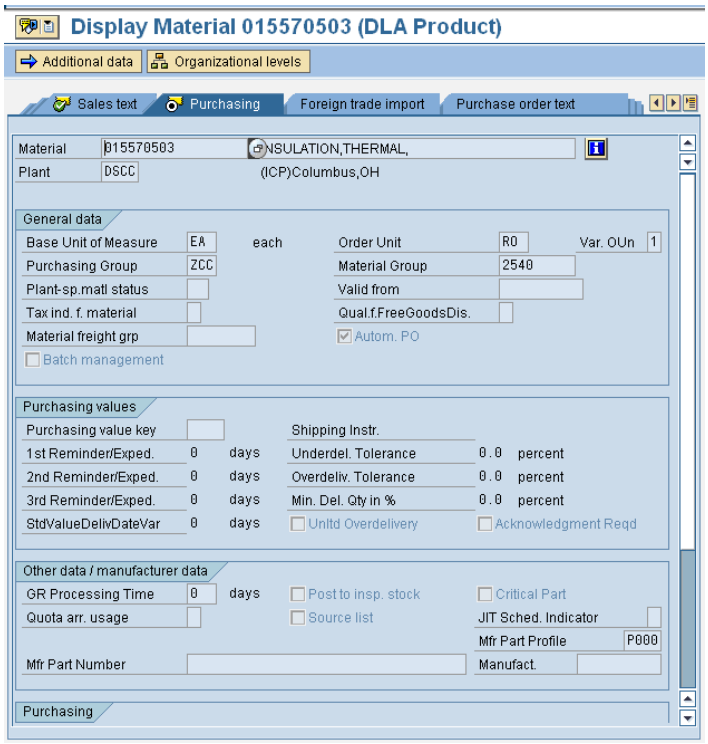
Phrase Future
FUTURE DATA EFF-DT:2009274 PRI-DIC: ORI-DIC: LCM ORG-ACTY: 9T

MOE	USC	PHRS-CD	PHRASE-CODE-DATA	ORDER-OF-USE	JUMP-TO-CODE	QPA	UM
DM	M	4	5640015552892			0	
DS	I	K	00000000050FT			0	
DF	F	K	00000000050FT			0	
DA	A	K	00000000050FT			0	
DN	N	K	00000000050FT			0	
DM	M	K	00000000050FT			0	

Review Sales: Sales Org. 1 - Base Unit of Measure (BUoM) does not change only the Sales Unit (SU), changes. The SU will equal the FLIS TIR/Management Section UI. As shown below:



Review - Purchasing Tab Order Unit (OU) changes when the Sales Unit (SU), changes; as shown below.

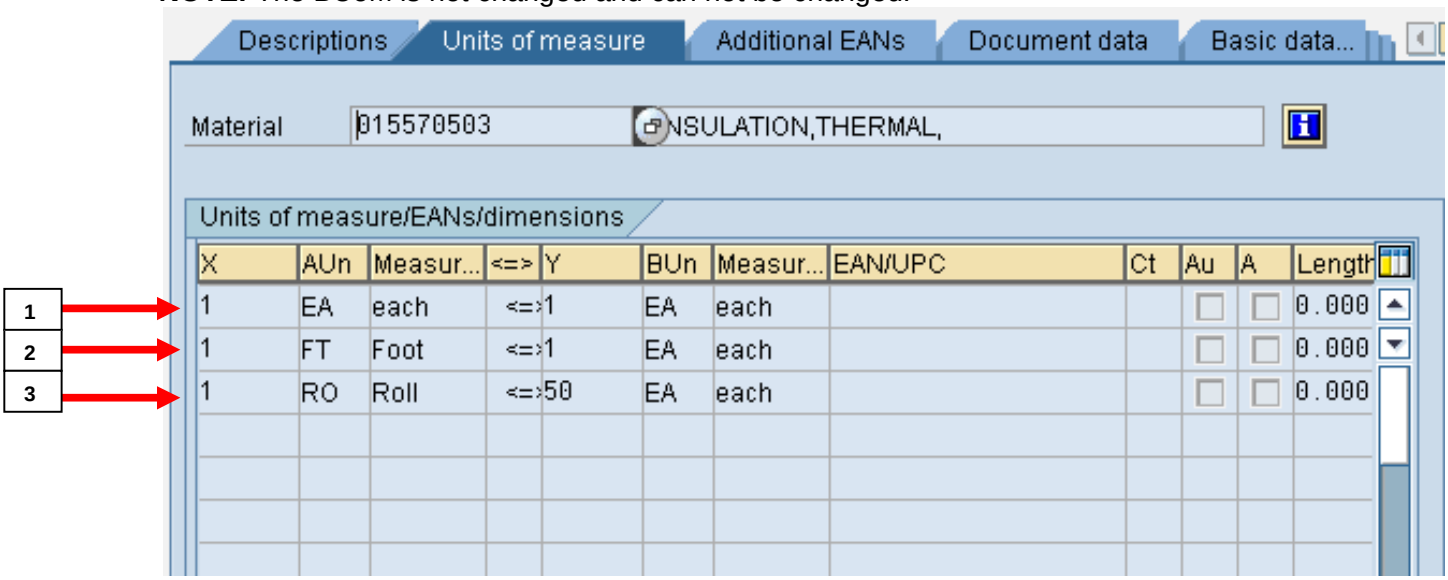


NOTE: The **only time** the OU and the SU **will not be equal** is when the manufacturer (MFG) supplies the material in quantities other than the SU. **The OU may be updated but shall only be updated by the BPA.**

Additional Information/Unit of Measure Tab Displays: BUoM and conversion factor to SU or OU. Looking at the example below the following is a history of the BUoM/SU and the changes that have occurred and the conversion ratio between the changes. Ensure the correct information is loaded

Original BUoM/SU and what was recorded originally in the FLIS TIR/Management Data Section SU/FLIS TIR UI changed from EA to FT with a 1 to 1 Conversion Ratio/UI Conversion Factor 00001. SU changed from FT to RO with a 1 to 50 Conversion Ration/UI Conversion Factor 00050.

NOTE: The BUoM is not changed and can not be changed.



Review Additional Data/Internal Comment – Verify TGI/PGI; ensure the Unit of Measure information is accurately recorded in the TGI/PGI and Packaging Guidance section as appropriate.

Includle the following:

1. Date all notes
2. Align notes in Internal Comments beginning with the most current at the top of each guidance section.
3. When the UI applies to a specific vendor be sure to include the vendor CAGE in the notes
4. Annotate Internal Comments when the Sales Unit and Order Unit are different. Meaning the UI we issue to the customer (SU) is not the same as the UI we procure (OU) under always include the vendor and both the Sale Unit and Order Unit as follows:

    - CAGE
    - SU – FT (1)
    - OU - RO(100)

    NOTE: ALWAYs annotate Vendor/Manufacturer differences

```
10/03/08 Per the coded sources Cages 1EFH8, and 36MV0 the part
numbers are good and the item is available. Larry French FLBB
X8463 10-13-08 RSW WORKED-/LARRY SLONE FLBB X8690.


QUALITY GUIDANCE DATA:
PIC/QCC - 2/DAA

PACKAGING GUIDANCE DATA:
5/29/09. Unit container changed from A2 to ZZ and updated
inspection txt to include "UNIT CONTAINER=ZZ: supplier's unit
container is acceptable, such as a reel, roll, spool, etc.."
Acquisition shall be notified of changes to modify
contracts/PRs. POC: M. KREML/DSCC-VSP/2-8806.

4/4/09. Supplier only provides material on 50 FT rolls. As
requested by Edward J. Eby, Quantitative expression changed from
100 FT to 50 FT. Effective date is 2009152. POC: M.
Kreml/DSCC-VSP/2-8806.

10-31-08. Unit of issue update. EBS supplemental packaging data
(inspection text) updated to include the following: "Unit of
issue is "RO" (roll). One roll consists of 100 feet. Customer
may order material by base unit 1 EA = 1 FT." This data will
display on PR, PO, and contracts. POC: M. Kreml/DSCC-VSP/2-8806.
```

Purchase Order Text Tab

When the OU is different than the SU it is important to insure that the POT is updated with the correct Unit of Measure conversions and clear text explanation as shown below. **NOTE:** Align all notes in the Purchase Order Text beginning with the most current at the top of each guidance section.

Display Purchase order text: Purchase order text Language EN

Formats ¶

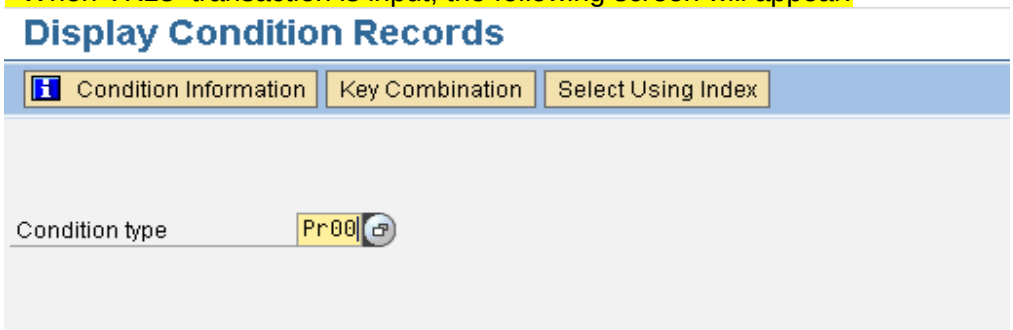
Parag.Formats * Paragraph, left-aligned Char.Formats

```
INSULATION,THERMAL,VEHICULAR
(WRAP, EXHAUST PIPE)

UNIT OF ISSUE IS FOOT
50 FEET PER ROLL

"Unit of issue is "RO" (roll). One roll consists of 50 feet.
Customer may order material by base unit 1 EA = 1 FT."


INCLUDE CA060 OBJECT TEXT ID ST
```

Validation of Price Change

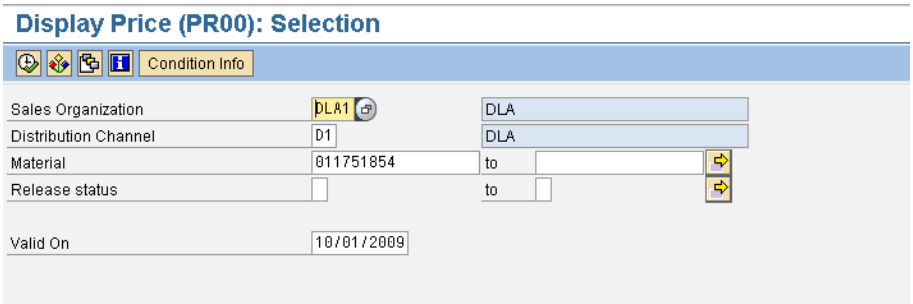
The FLIS price is the on-line catalog price that is visible to the Services of material prices within DoD. FLIS prices are maintained by DLIS. You can access the FLIS website by: EBS Portal Home Page, click on WEBFLIS under the quick links, and then click on public search. Pricing changes made in EBS will show the next day in FLIS under "management future – future data effective date". DLA customers are billed the price in EBS at the time of shipment. This may or may not be the same as the FLIS price. Out-of-cycle price changes that are over $100K impact are made effective in EBS for the next day. All FLIS price changes are updated approximately 48 days later. To validate a price change in EBS, check the PR00 price condition to make sure that the price has been updated. This is accomplished by using transaction code VK13, Display Condition Records or clicking on the Conditions button on the Sales:sales Org 1 tab.

When VK13 transaction is input, the following screen will appear:



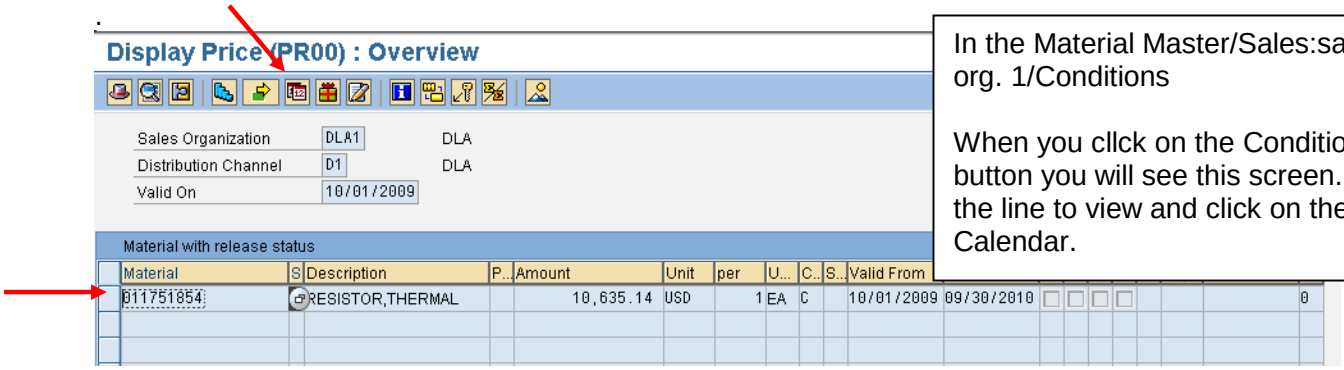
Select Key Combination button

1. Material with release status button
2 Click green check (choose button)



If the Sales Organization is blank, enter DLA1. If the Distribution Channel is blank, enter D1. Enter the material number and valid on date then execute

.

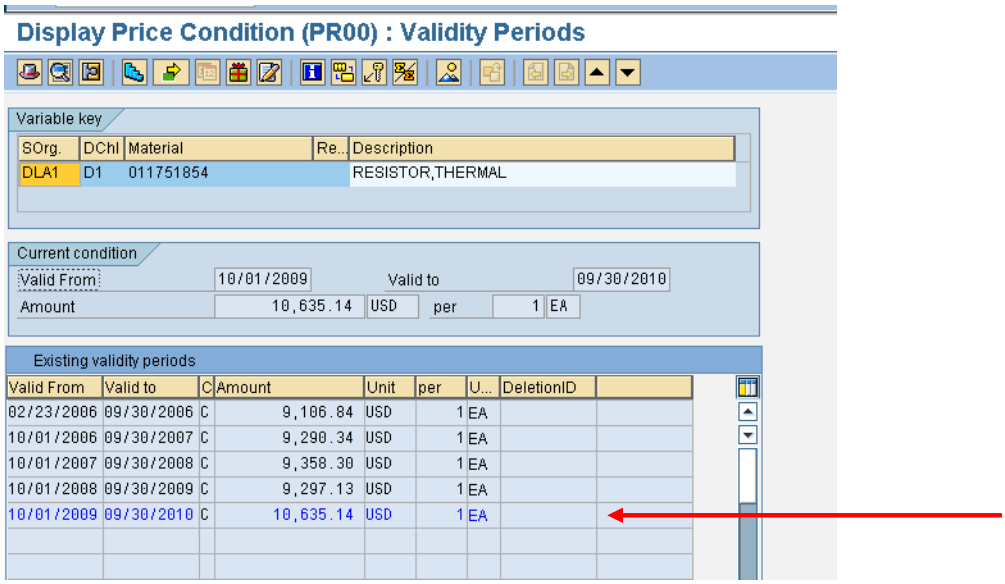


In the Material Master/Sales:sales org. 1/Conditions

When you cllck on the Conditions button you will see this screen. Select the line to view and click on the Calendar.

Now go to the tool bar and click on the calendar, which is to the left of the gift box. The next screen will show you the history of the pricing for the item and the timeframes for which the prices were valid.

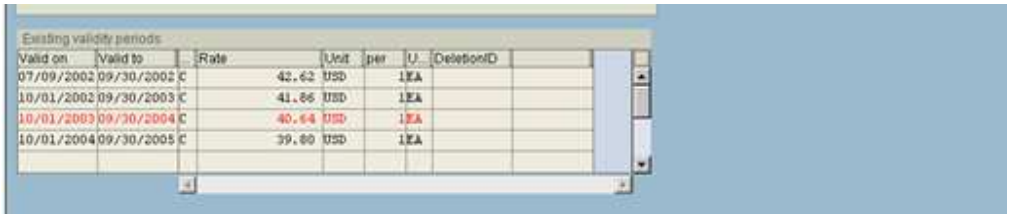
The following screenshot shows the various prices. If you are looking at this page on the computer screen or have a color printer, the price that is currently effective will be highlighted in BLUE. This example already has the future dated price that will be effective on October 1, 2009 through Sept 30, 2010.



When a sales unit change occurs, usually the FLIS price will also change. Due to the requirement to show the FLIS unit price in the Sales Unit and not the Base Unit of Measure, a future dated price will not be visible. The new price however will be visible using VB13 only on the effective date. On the effective date a new pricing condition record will be created so that the new price will be associated with the new Sales Unit. Thus the future price will not be visible for sales unit changes until the effective date.

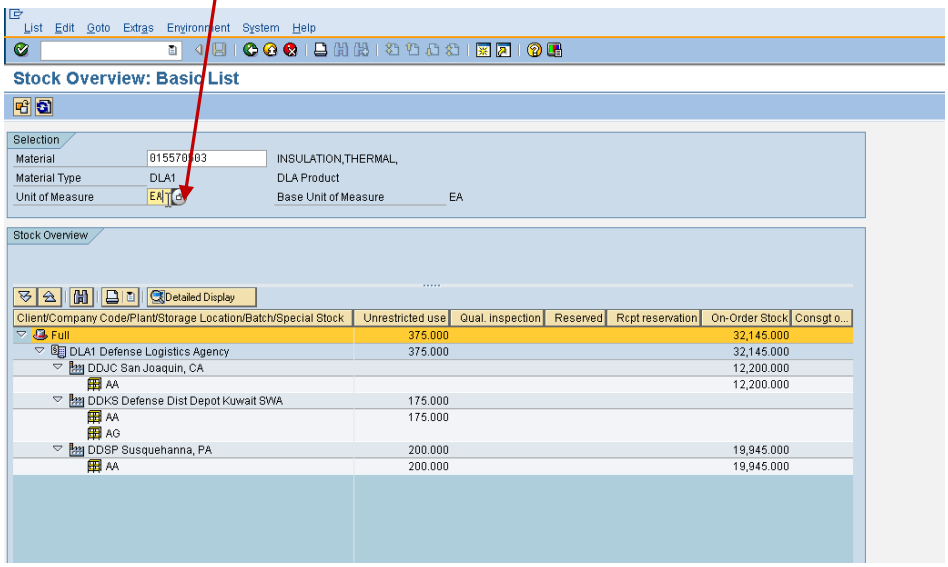
Looking at the example above that we were following, the screen below would have a new line that would be as follows if the sales unit change is effective on November 1.

Valid on	Valid to	Rate	Per	Unit
11/01/04	09/30/05	156.00	1	PG



Stock Overview quantity validation-Access transaction MMBE

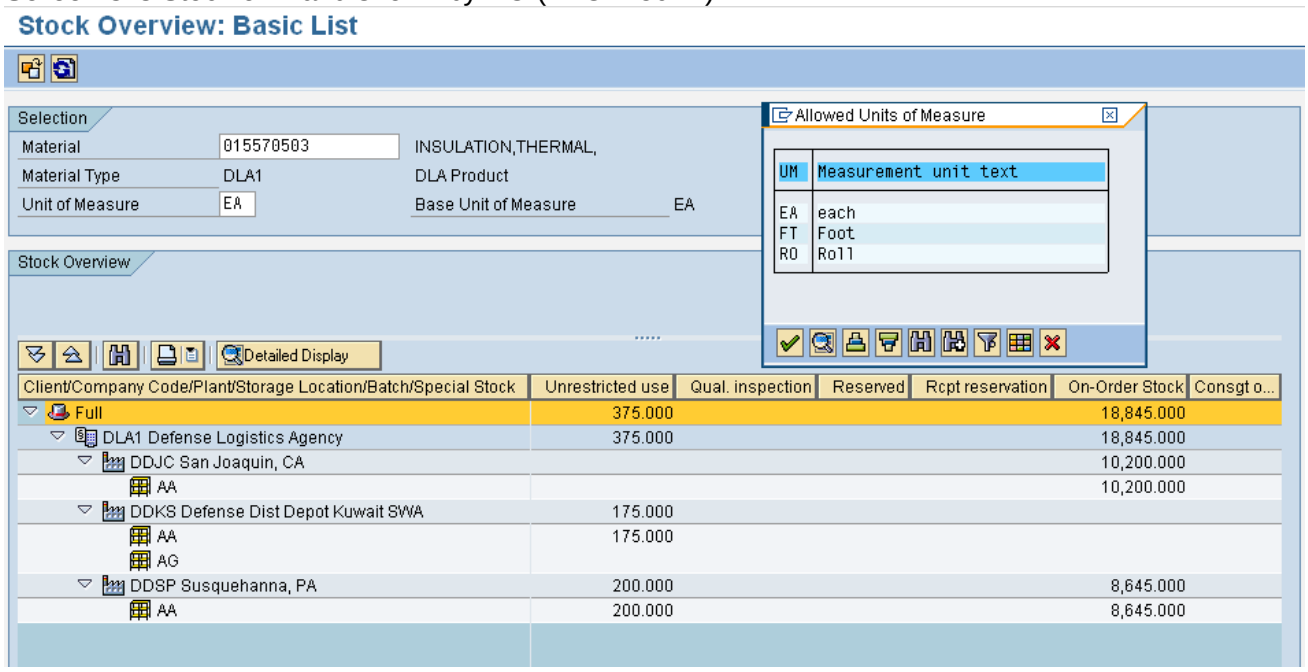
The Stock Overview Screen can provide the display of material in terms of the Base unit of measure or the Sales Unit. To see the allowed Units of Measure click on the drop down menu beside Unit of Measure.



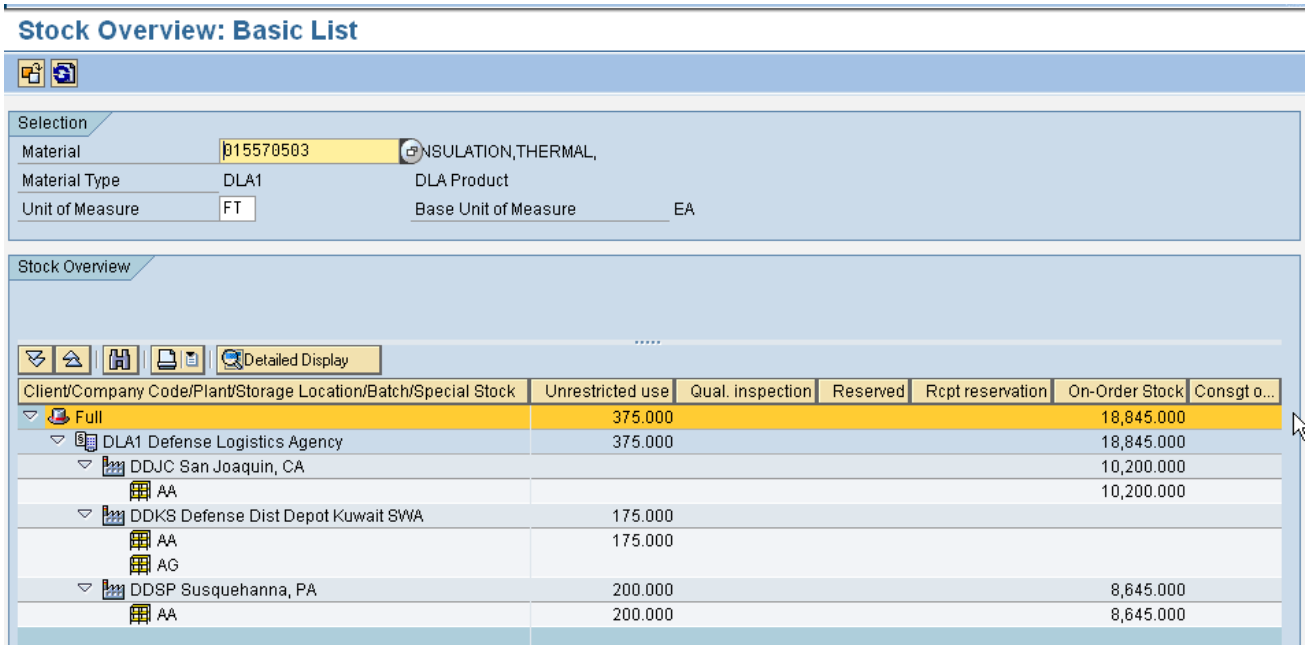
Examples have been provided on the following pages to show the “Allowed Units of Measure” for this material.

Screen 1 is Stock on Hand shown by EA (1EA = 1FT)
Screen 2 is Stock on Hand shown by FT (1FT = 1FT)
Screen 3 is Stock on Hand shown by RO (1RO = 50FT)

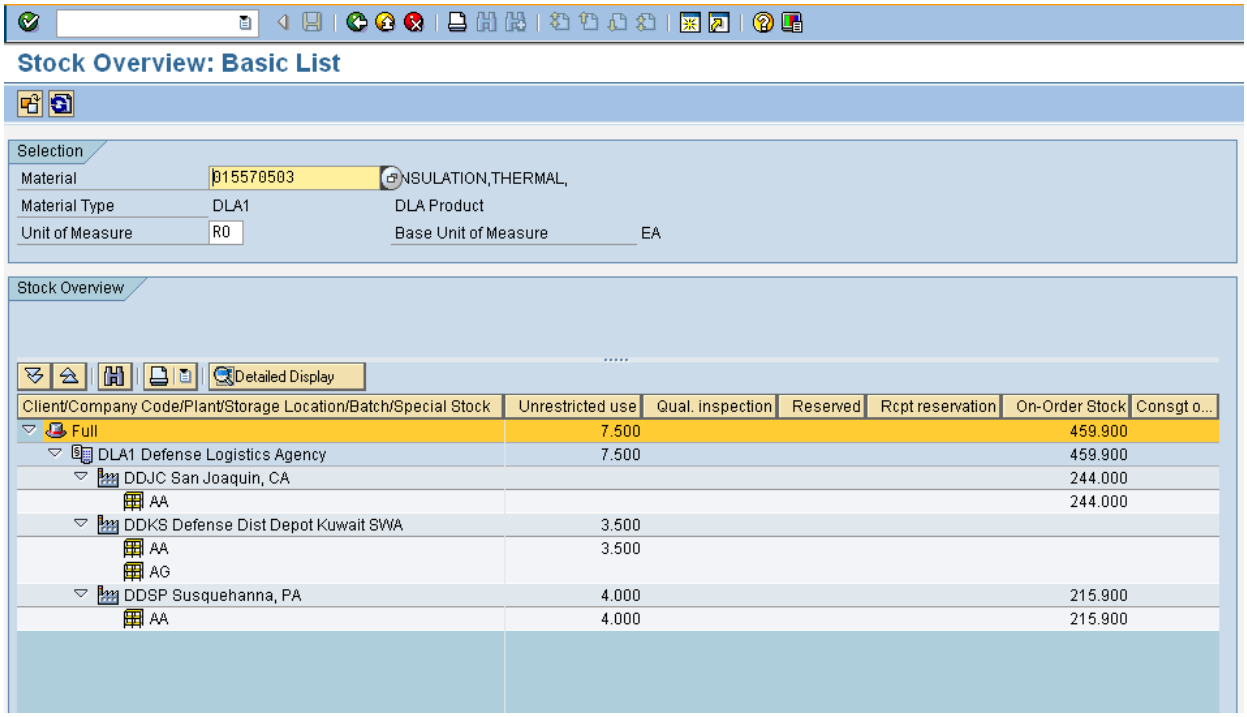
1



2



3


Stock Overview: Basic List
Selection
Material 015570503 INSULATION,THERMAL,
Material Type DLA1 DLA Product
Unit of Measure RO Base Unit of Measure EA
Stock Overview
Detailed Display
Client/Company Code/Plant/Storage Location/Batch/Special Stock | Unrestricted use | Qual. inspection | Reserved | Rcpt reservation | On-Order Stock | Consgt o...
Full 7.500 459.900
DLA1 Defense Logistics Agency 7.500 459.900
DDJC San Joaquin, CA 244.000
AA 244.000
DDKS Defense Dist Depot Kuwait SWA 3.500
AA 3.500
AG
DDSP Susquehanna, PA 4.000 215.900
AA 4.000 215.900