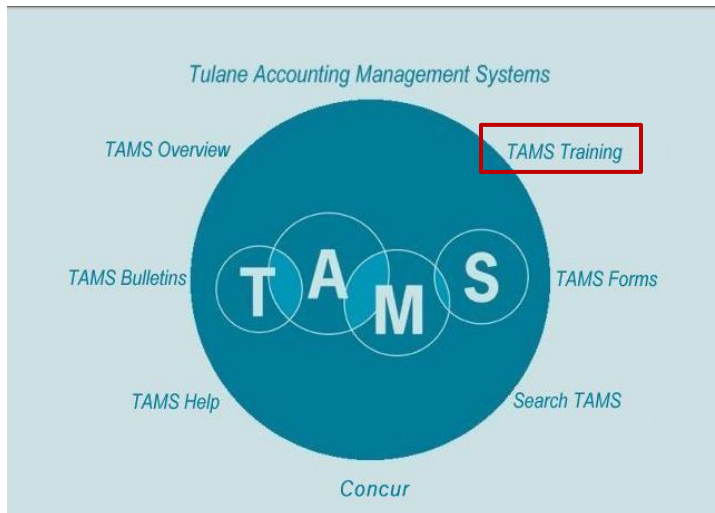


TAMS UPK (User Productivity Kit) Training

1

The TAMS training for Requisitions and General Ledger are now available on the TAMS Index website: <http://www.tulane.edu/~tams/index.html> .

Open the TAMS Training link.



Click on the General Ledger or Requisitions Link.

Online Training

Click the links below to go to online training.

[General Ledger](#) - Online instructions for General Ledger. This module covers:

- Performing an account inquiry
- Performing advanced queries
- Using folder tools
- Exporting TAMS data
- Performing payables inquiry
- Inquiring on available funds

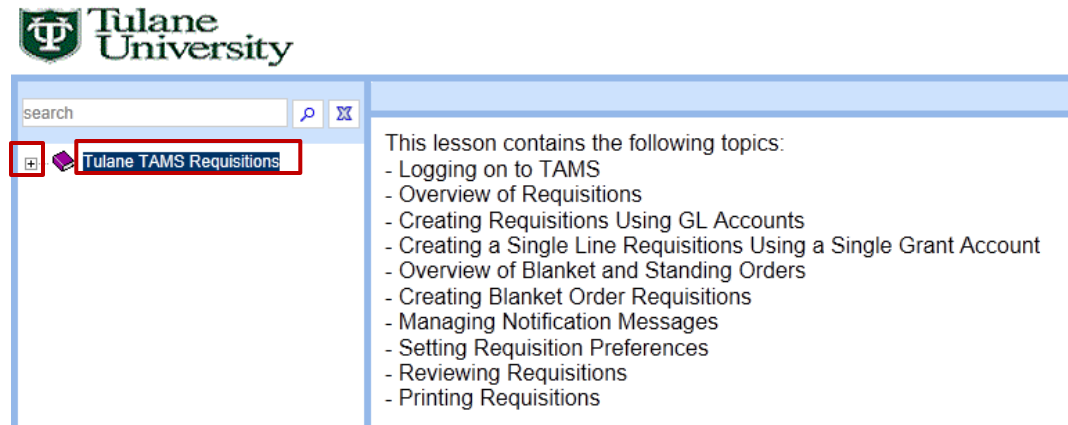
[Requisitions](#) - Online instructions for Requisitions. This module covers:

- Overview of TAMS requisitions
- Creating requisitions using GL accounts
- Creating a single line requisition using a single grant account
- Overview of blanket and standing orders
- Creating blanket order requisitions
- Managing notification messages
- Reviewing requisitions
- Setting requisition preferences
- Printing requisitions

Online Training Start Page

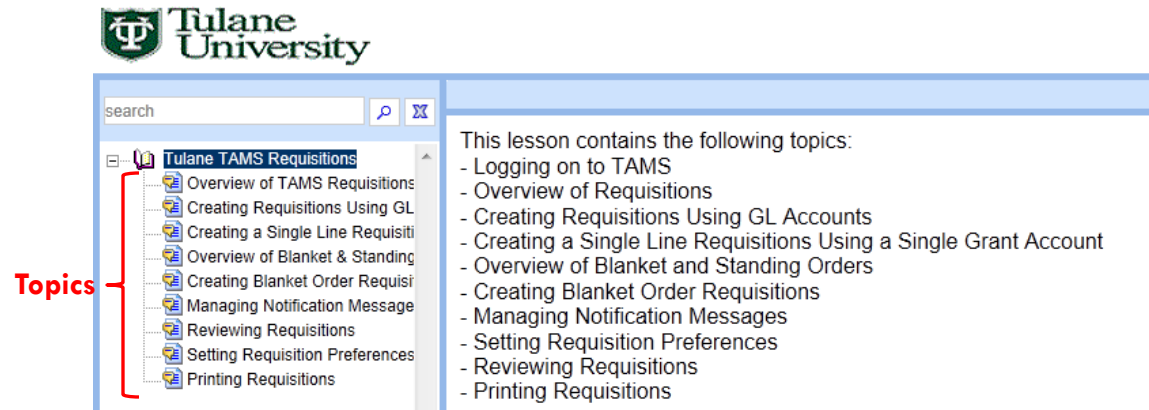
2

- After you've clicked on the training link, you will see this web page.
- The training module is "Tulane TAMS Requisitions".
- Clicking on the "+" next to the module will expand the individual topics.
- NOTE: The UPK topics open in a browser window. To exit the online training, close the corresponding browser tab.



This lesson contains the following topics:

- Logging on to TAMS
- Overview of Requisitions
- Creating Requisitions Using GL Accounts
- Creating a Single Line Requisitions Using a Single Grant Account
- Overview of Blanket and Standing Orders
- Creating Blanket Order Requisitions
- Managing Notification Messages
- Setting Requisition Preferences
- Reviewing Requisitions
- Printing Requisitions



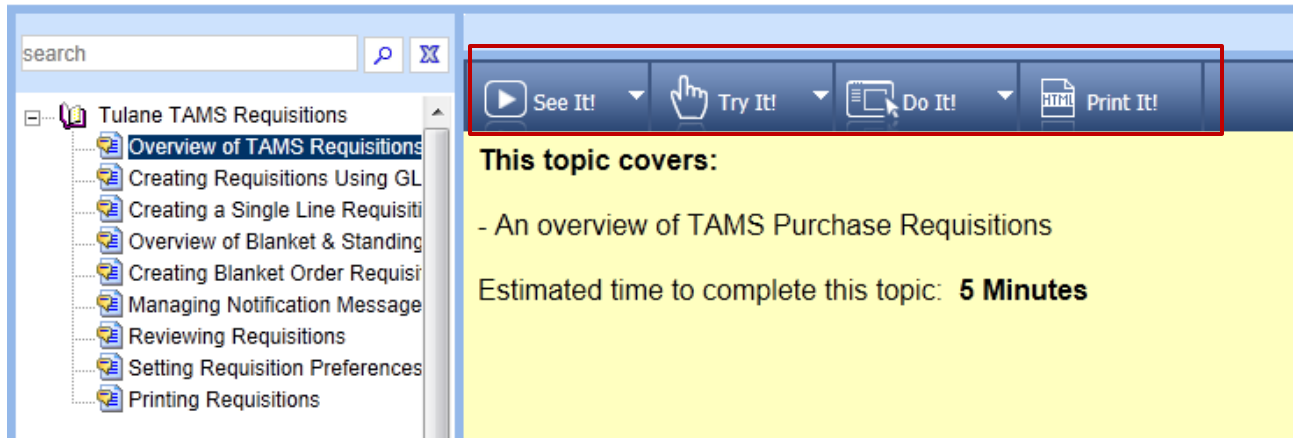
This lesson contains the following topics:

- Logging on to TAMS
- Overview of Requisitions
- Creating Requisitions Using GL Accounts
- Creating a Single Line Requisitions Using a Single Grant Account
- Overview of Blanket and Standing Orders
- Creating Blanket Order Requisitions
- Managing Notification Messages
- Setting Requisition Preferences
- Reviewing Requisitions
- Printing Requisitions

Online Training Modes

3

- When you click (single click) on a training topic you will see an overview of the topic and the training modes:
 - See It Mode
 - Try It Mode (The preferred training mode)
 - Do It Mode
 - Print It Mode
- Click on the mode you wish to use to view the topic.
- NOTE: Double clicking on the topic will automatically open the Try It Mode



search

Tulane TAMS Requisitions

- Overview of TAMS Requisitions
- Creating Requisitions Using GL
- Creating a Single Line Requisition
- Overview of Blanket & Standing
- Creating Blanket Order Requisition
- Managing Notification Message
- Reviewing Requisitions
- Setting Requisition Preferences
- Printing Requisitions

See It! Try It! Do It! Print It!

This topic covers:

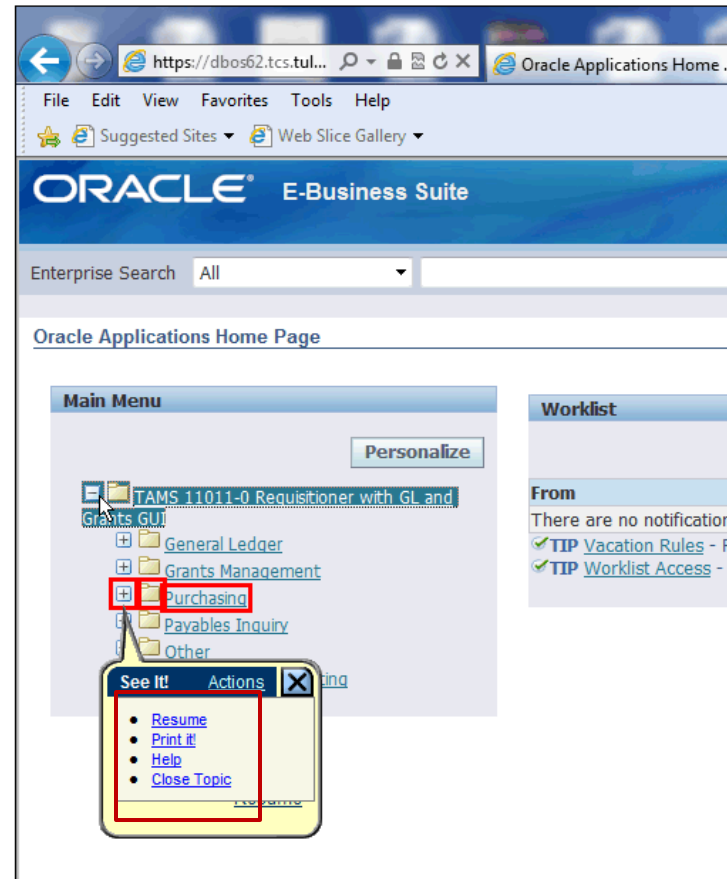
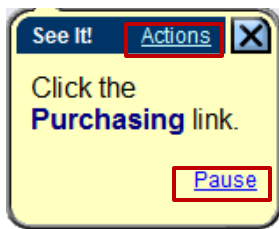
- An overview of TAMS Purchase Requisitions

Estimated time to complete this topic: **5 Minutes**

See It Mode

4

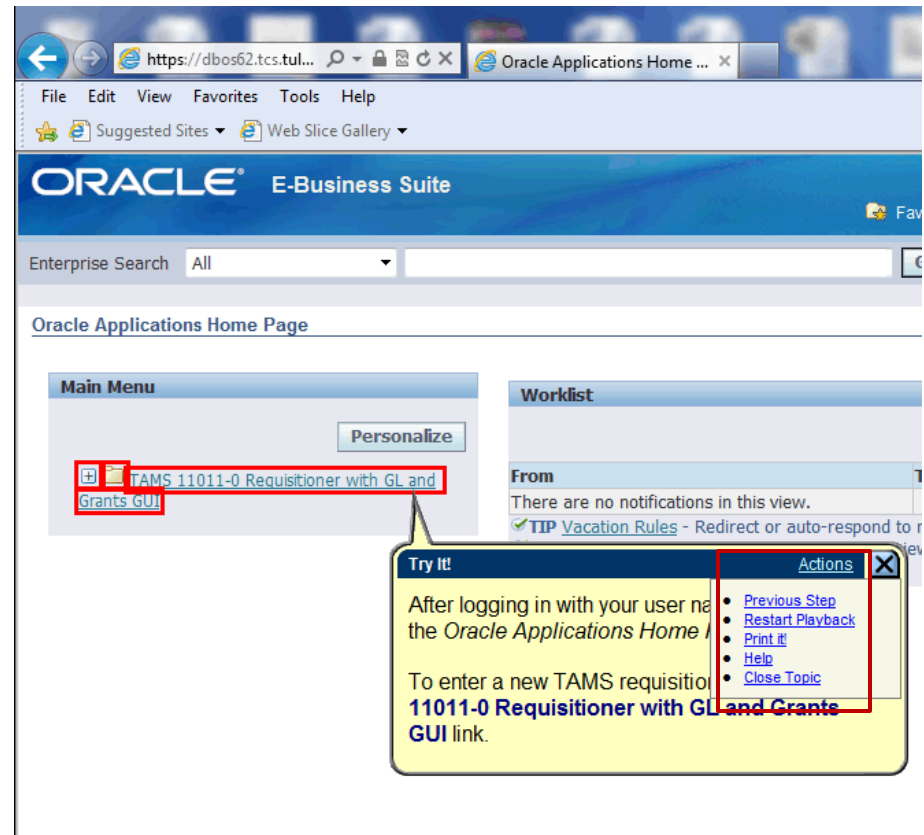
- See It mode automatically progresses through the training steps while you watch.
- You can pause the training by clicking “Pause” and resume the training by clicking “Resume”.
- Clicking on “Actions” will pause the topic and gives you the options:
 - Resume the topic
 - Open the Print It mode
 - Open help
 - **Close the topic**



Try It Mode

5

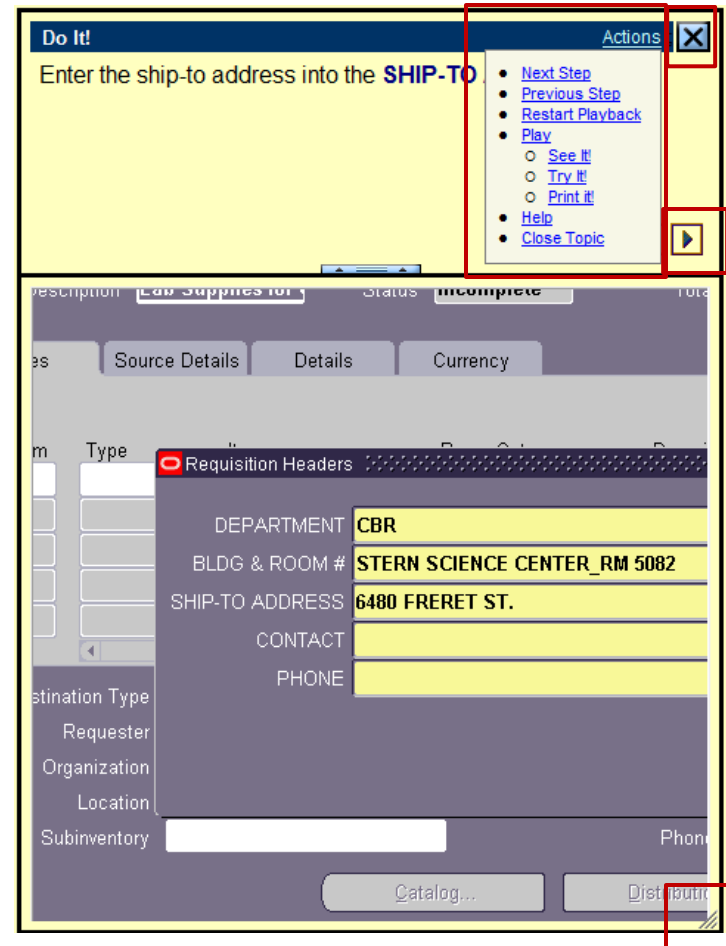
- Try It mode is self-paced and interactive.
- This is the preferred training method because it requires you to complete each step as you would if you were actually performing the function in TAMS.
- Follow the steps as directed.
- When directed to type in a field, you must type in the information exactly as shown (not case sensitive) to progress to the next step.
- Clicking on “Actions” gives you the following options:
 - Go back to the previous step
 - Restart from the beginning
 - Open Print It mode
 - Open help
 - Close the topic



Do It Mode

6

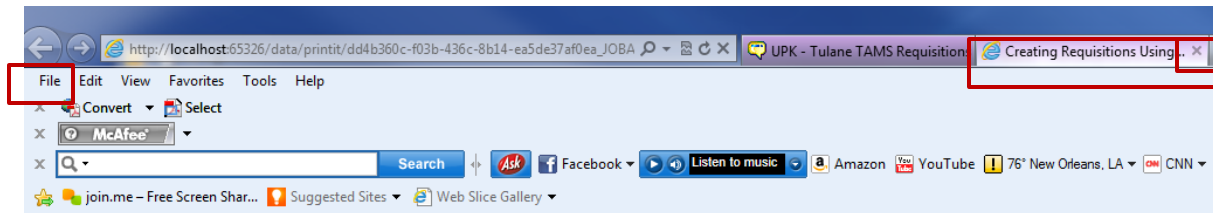
- Do It mode is self-paced and non-interactive (you do not have to perform the actions or type in the information).
- Do It mode opens in a pop-up window that can be expanded or contracted by grabbing the lower right hand corner with your mouse and moving to the desired size.
- Progress (or go back) through the steps by clicking the forward or back arrows.
- Clicking on “Actions” will give the following options:
 - Go to the next step
 - Return to the previous step
 - Restart from the beginning of the topic
 - Open the See It, Try It or Print It modes
 - Open help
 - Close the topic (which you can also do by clicking the “X” in the upper right hand corner).
- This pop up window can be open in a browser tab while TAMS is opened in another tab to assist you in navigating.



Print It Mode

7

- Print It mode provides a written list of the steps in the topic (without screenshots).
- It opens in a separate browser tab.
- Select File -> Print from your browser window to print the list.
- To close Print It, close the browser tab.



Creating Requisitions Using GL Accounts

Step	Action
1.	After logging in with your user name and password, the <i>Oracle Applications Home Page</i> is displayed. To enter a new TAMS requisition, click the TAMS 11011-0 Requisitioner with GL and Grants GUI link .
2.	Click the Purchasing link .
3.	Click the Requisitions link .
4.	To open the <i>Requisitions</i> window, click the Requisitions link .
5.	The <i>Requisitions</i> window is displayed. The Operating Unit value will default to "Tulane University". The Type value default to "Purchasing Requisition". The Preparer name value defaults to your name. The Status value defaults to "Incomplete". This value will change as the requisition progresses through the approval process.