

GEARS

General Enterprise And Resource Support

PO210

Last Revised: June 27, 2013

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PO210

PO210 Managing Items

Course Overview

The GEARS Purchasing module uses items and services as fundamental building blocks of its procurement business processes. These items are managed in central tables called the Item Master. In conjunction with items, Purchasing maintains item categories or groupings of like items. Consequently, Items and Item Categories collectively can be used by the Judiciary to conduct spend analysis by category. Item Categories can also be used by requesters to find the correct Items when necessary and when the requester does not know the item number.

In Purchasing, maintenance of Items and the Item Catalog is ongoing as item information changes (e.g., price of an item or vendor changes) or as new items need to be added or deactivated. The designated Item Administrator manually adds and updates items and related information as item requests are made by Judiciary GEARS users who are procuring goods or services.

The *PO210 Managing Items* course teaches you how to create and manage items and item-vendor relationships.

Course Outline

The following lessons will help users understand the concepts associated with the Item Master and to manage the Item Master for the Judiciary.

- Course Audiences and Prerequisites
- Lesson 1: Understanding the Item Master
- Lesson 2: Updating the Item Master
- Course Summary

Course Audience and Prerequisites

Audience

The Judiciary audiences for this course are:

- AOC - Procurement and Contract Administration

GEARS Role

This course is intended for Judiciary employees with the following GEARS role(s):

- PO Item Administrator

Prerequisites

The recommended prerequisites for this course are:

- INT100 Introduction to GEARS
- PO100 Understanding GEARS Procurement

Lesson 1: Understanding the Item Master

Lesson Overview

Understanding the Item Master is critical to being able to use the Inventory and Purchasing business processes of the GEARS system. The **Item Master** contains data that is used across the system. Some data elements are used exclusively within Inventory and other data elements are used exclusively within Purchasing. Some data elements are optional. The objective of GEARS is to capture the information that is necessary to manage and to control procurement within the Judiciary.

All items will go through a formal review process, and will be managed by a small population of AOC Procurement and Contract Administration office personnel.

Lesson Objectives

After completing this lesson you will be able to:

- Learn the purpose, use and maintenance of the **Item Master**
- Distinguish between the data elements that are required versus those that are optional

1.1 Reviewing Item Master Attributes

The **Item Master** is used to define the attributes of items that can be transacted in the GEARS system. Every item in the **Item Master** is assigned a unique Item ID for the Judiciary. Any item purchased at the Judiciary must have an Item ID assigned to it. A requisition can be created for an item that does not have an Item ID assigned to it but a Purchase Order cannot be created until an Item ID has been created.

Item attributes can be broken into three specific categories: Global attributes, Purchasing attributes and Inventory attributes. Every item must have global attributes established for it before Purchasing or Inventory attributes can be established.

Global Attributes

Global attributes include the description and Standard UOM for the item. These attributes combine to provide the basic definition of the item.

Purchasing Attributes

Purchasing attributes include the list of vendors (as well as other attributes) that are eligible to supply the item to the Judiciary. The list of qualified vendors can be maintained over time as new vendors are added to the list and as older ones are inactivated. The Purchasing attributes also include the preferred vendor, identified as a "Priority 1" vendor. When operated in automatic mode, GEARS can automatically create purchase orders for the item for the "Priority 1" vendor. **NOTE:** The Judiciary may not elect to use this functionality. However, when the system does not create POs automatically, the item-vendor relationship assigned can serve as a reference point for Procurement Buyers during the solicitation process.

The pages used to enter Purchasing attributes are displayed below - including the **Purchasing Attributes**, **Purchasing Controls** and **Item Vendor** pages.

Purchasing Attributes Page

Purchasing Attributes | **Purchasing Controls** | Item Vendor

SetID: SHARE Item ID: DC-4 Standard Unit of Measure: EA

Description: Labels, File Stickers and Labels

PO Available Date: 12/10/2012

Unavailable: []

Standard Price: 150.00000 EA

Last PO Price: 150.00000

*Currency: USD Dollar

Lead Time Days: []

*Long Description: Labels, File Stickers and Labels

*Item Descr: Labels, File Stickers and Labels

Category: OFC_SUPPLIES

Model: []

Asset Profile ID: []

Ultimate Use Code: []

Physical Nature: Goods

Primary Buyer: KJONES JONES, KEVIN

Associated Picture
File Name: []
File Extension: []

Chartfields
PCA *Account
60183 0301

Item Specifications | Packing Details
VAT Default | VAT Service Treatment Setup

OK Cancel Apply

Purchasing Attributes | Purchasing Controls | Item Vendor

Purchasing Controls Page

Purchasing Controls are defined at the Item Category level. This page is for informational purposes only when adding an item.

Purchasing Attributes | **Purchasing Controls** | Item Vendor

SetID: SHARE Item ID: DC-4 Standard Unit of Measure: EA

Description: Labels, File Stickers and Labels

Expand All Collapse All

Matching Controls

	Tolerance Over	Tolerance Under
Unit Price Tolerance:	0.00000	0.00000
% Unit Price Tolerance:	0.00	0.00
Ext Price Tolerance:	0.00000	0.00000
% Ext Price Tolerance:	5.00	0.00

Receiving Controls

*Receiving Required: Required

Reject Qty Over Tolerance

Qty Rcvd Tolerance %: 100.00

*Partial Qty: Rcvd

Early Ship Reject Days: 0

Inspection Required

Inspect Sample Percent: 0.00

*Inspection UOM: Standard

Inspect ID: []

Sourcing Controls

Use Category Sourcing Controls

Lead Time Factor %: 0.00

Price Factor %: 0.00

*Sourcing Method: Basic

Ship to Priority Factor %: 0.00

Vendor Priority Factor %: 0.00

Misc. Controls and Options

Auto Select

Accept Any Vendor

Accept Any Ship To

Available in All Regions

Close PO Under Percent Tol: []

Contract Required

RFQ Required

Stockless Item

Taxable

Include in Planning

Item Vendor Page

Purchasing Attributes | Purchasing Controls | **Item Vendor**

SetID: SHARE Item ID: DC-4 Standard Unit of Measure: EA
Description: Labels, File Stickers and Labels

Vendor Priorities

Vndr SetID	Vendor ID	Vendor Name	*Priority Loc	Location Description	Status	*Priority	Alloc Pct
SHARE	00000123	ABC TEST COMPANY	MAIN	CORPORATE OFFICE	A	2	0

Item Vendor

*Vendor SetID: SHARE Vendor Lookup *Status: Active
*Vendor ID: 00000123 ABC TEST COMPANY *Priority: 2
Allocation %: 0 Include in Planning
Vendor's Catalog:
Vendor Item ID:
Item Extension:
Description:

Associated Picture

Vendor Attributes

*Price Loc: MAIN Accept Any UOM
*Price Date: PO Accept Any Ship To
*Price Qty: Line Quantity Stockless Item
Origin Country: Price Can Be Changed on Order
Region of Origin: Use Item Standard Lead Time
Lead Time Days:

Order Multiples
 Check Order Multiples
Rounding Rule
 Natural Round
 Round Up

[Item Vendor UOM](#) [Vendor Item MFG](#)
[Return to Vendor Fees](#) [Item Vendor Contracts](#)

Inventory Attributes

Inventory attributes include information about the item that is needed by warehouse employees to store and to manage the item. At present, Inventory attributes are only required for items that are to be stored in the District Court warehouse (ie. Forms). Examples of this type of information include the "default putaway locations", Order Point and Order Quantity. If an item is not expected to ever pass through the District Court Warehouse, then Inventory attributes don't have to be established.

1.2 Reviewing Standard Units of Measure

Understanding the Importance of the Standard Unit of Measure

When an item is initially setup in the Item Master, it must have a Standard Unit of Measure (UOM) assigned to it. Once a standard UOM is assigned to an Item, the system restricts when the assigned standard UOM can be changed. For this reason, it is very important that care is taken when these assignments are made. Once an item has been setup and transactions have been posted referencing that item, GEARS does not allow the standard UOM to be changed. If an item is handled in more than one UOM, the GEARS system allows all of them to be associated with the item.

For example, the GEARS system can setup copy paper so that it can be purchased as reams or as boxes using one Item ID. The system is capable of converting between Units of Measure. By setting up an item this way, the Judiciary can maintain all purchasing and usage records for copy paper under a single item number. Alternatively, the Judiciary can create one Item ID for copy paper transacted in reams and another for copy paper transacted as boxes.

NOTE: The Judiciary does not plan to use more than one UOM for an item.

The **Units of Measure** page can be used to view the Standard UOM and other related information for an item. You can access this page from the Define Item - General page for an item or navigate directly to the page (Navigation: *Items > Define Items and Attributes > Units of Measure*). The **Units of Measure** page is displayed below.

Units of Measure Page

Units of Measure

SetID: SHARE Item ID: 204-53COMP01
Computer, Personal desktop (Lenovo ThinkCentre M72e Tiny)

Convert To
Standard Unit of Measure: EA Each

Convert From
Unit of Measure: EA Each
Conversion Rate: 1.00000000
Quantity Precision: Whole Nbr
 Default Stocking UOM Default Req UOM
Rounding Rule: Natural Round Round Up

Unit of Measure Type
Unit of Measure Type
Ordering
Shipping
Stocking

UOM Weight/Volume Global Trade Item Number

[Return to Items](#)

Lesson 2: Updating the Item Master

Lesson Overview

In this lesson, you learn how to set up item categories, create items for an item category and update an item's attributes.

Lesson Objectives

After completing this lesson you will be able to:

- Add a new Item Category
- Associate an Item Category with an Item Catalog
- Create an Item and update Item attributes
- Updating vendor information for an item
- De-activate a vendor associated with an Item

2.1 Adding an Item Category

Item categories are used in GEARS as a way to group items by the individual attributes of the items. Examples of item categories include equipment, office supplies, furniture, etc. Once item categories are defined, you can associate specific items to the item categories. The Judiciary has defined categories that are appropriate for Judiciary business needs.

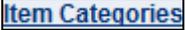
NOTE: Most GEARS item categories have been defined and should not be changed often. However, there may be a need to add a new item category or modify an existing one.

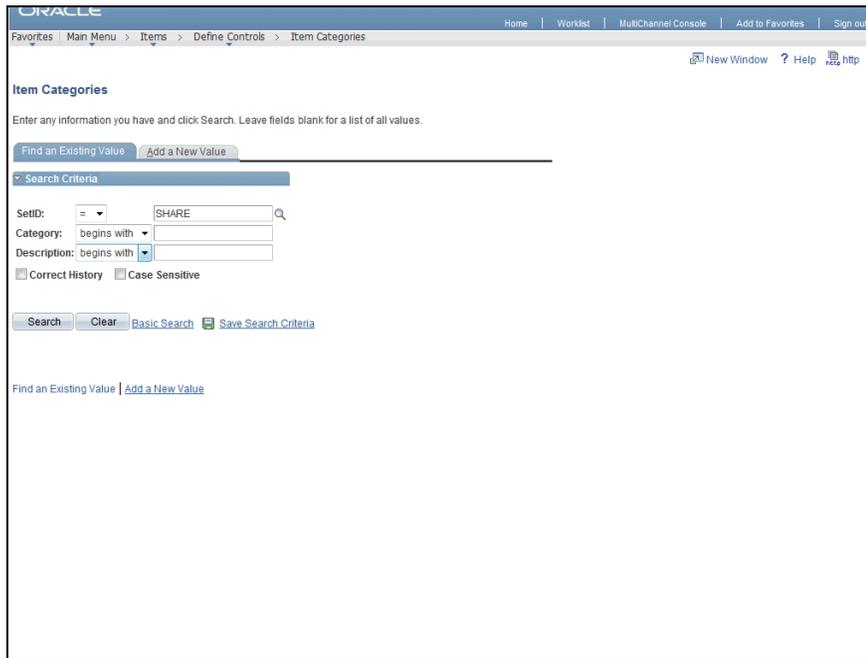
After completing this topic, you will be able to:

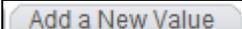
- Add an item category

Procedure

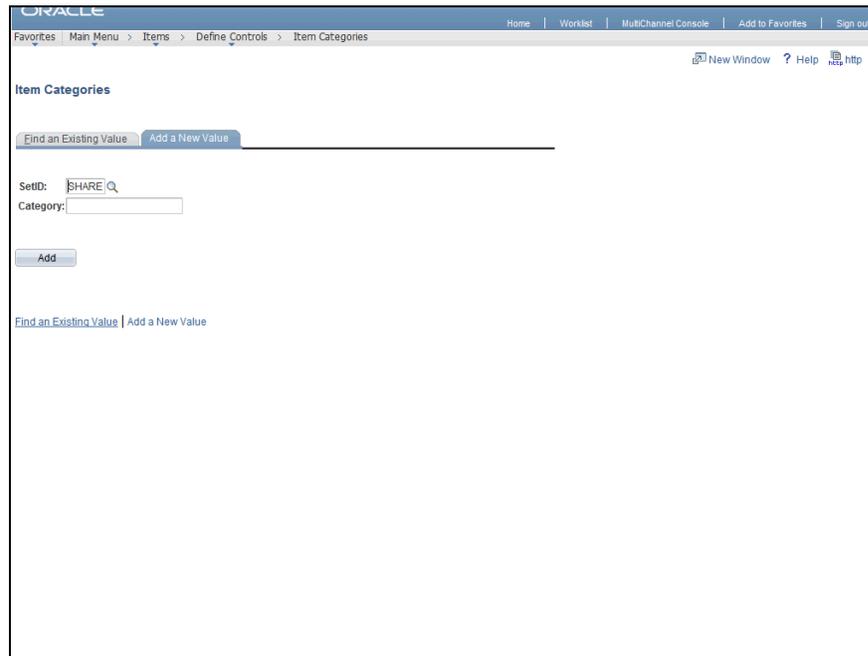
In this topic, you will add an item category and relate it to an existing item catalog.

Step	Action
1.	Begin by navigating to the Item Categories component. Click the Items link. 
2.	Click the Define Controls link. 
3.	Click the Item Categories link. 
4.	The Item Categories - Find an Existing Value page displays. If you want to view item categories that have already been created, use the Find an Existing Value tab to search.



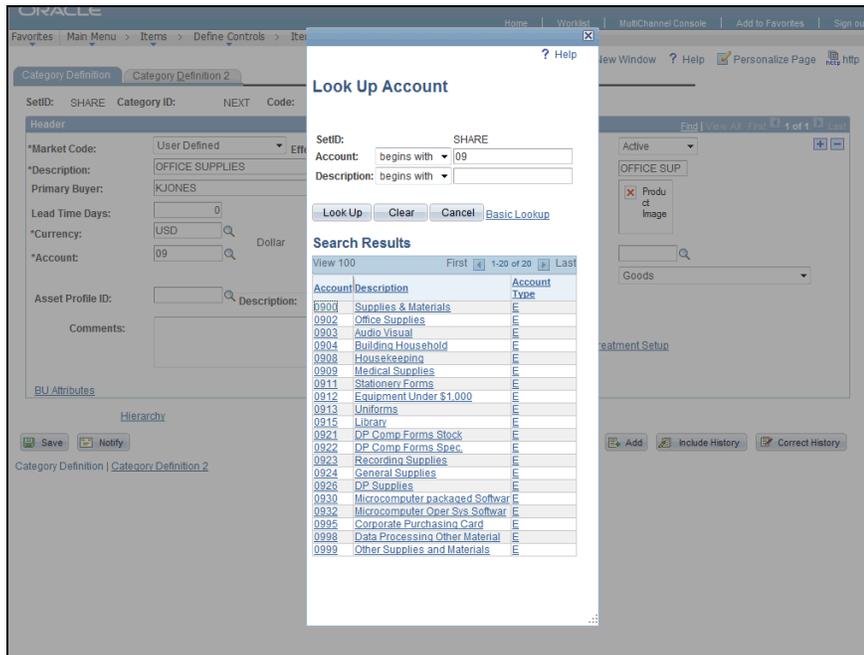
Step	Action
5.	Click the Add a New Value tab. 

Step	Action
6.	The Item Categories - Add a New Value page displays. Verify that the SetID field displays "SHARE".



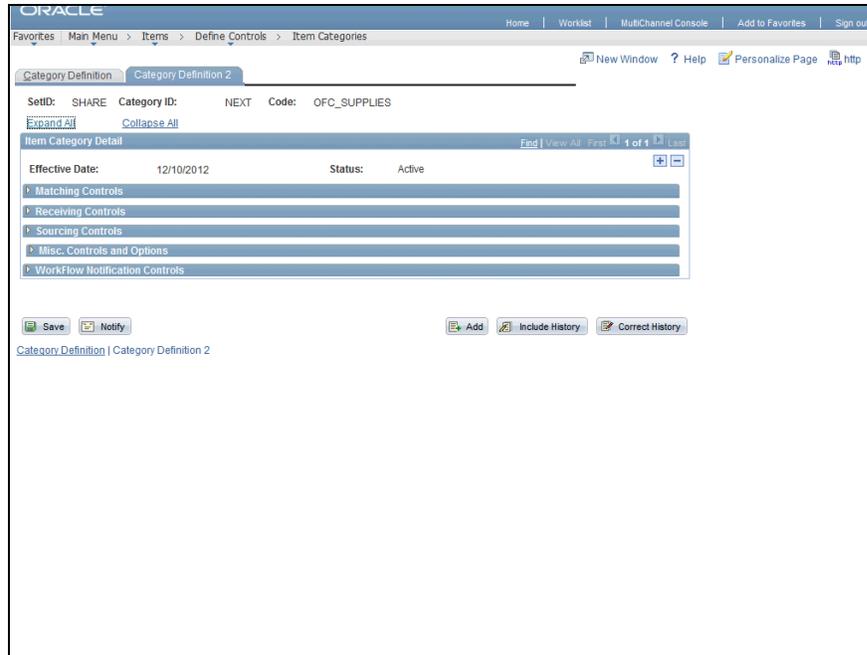
Step	Action
7.	Enter a category description into the Category field using your office naming convention.
8.	Click the Add button. 
9.	The Category Definition page displays. Enter basic category information on this page. Required fields on this page are: - Market Code - Description - Currency
10.	Enter the desired information into the Description field. Enter " OFFICE SUPPLIES ".
11.	Press [Tab] .
12.	The Short Desc field value auto-populates based on user entry in the Description field.

Step	Action
13.	Assigning a Primary Buyer to an Item Category allows the system to perform some purchasing functions automatically if AOC decides to use the system in that way. Click the Look up Primary Buyer button. 
14.	The system shows all the people who are identified in the system as Buyers. Click the KJONES link. 
15.	All transactions in the system at AOC will be in 'Dollars' so 'USD' should be entered into the currency field. Enter the desired information into the Currency field. Enter " USD ".
16.	If you know the appropriate account or a part of the account number, enter those values in the Account field, then click the 'Search' Icon. Click the Look up Account (Alt+5) button. 

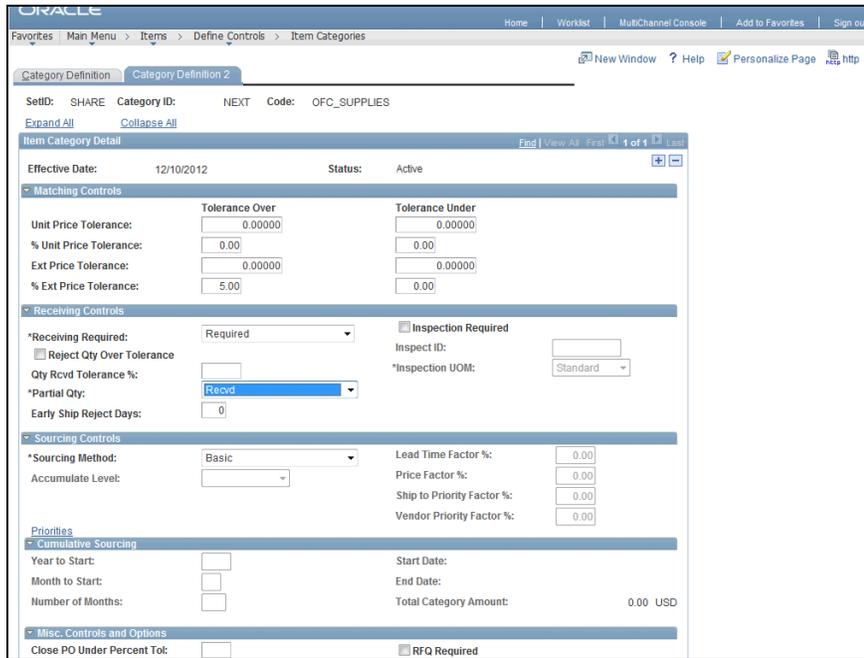


Step	Action
17.	The system will display the list of valid account numbers for you to select from. Click the 0902 link. 

Step	Action
18.	<p>Once you have entered the Account, you are ready to enter the balance of data related to the new Category.</p> <p>Click the Category Definition 2 tab.</p> 

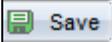


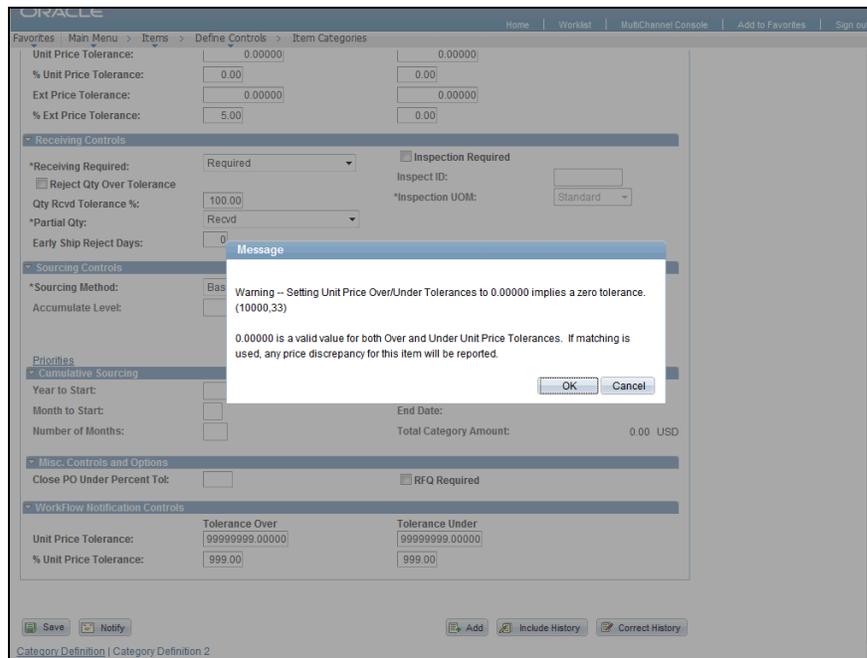
Step	Action
19.	<p>The Category Definition 2 tab displays.</p> <p>Click the Expand All link.</p> 

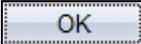


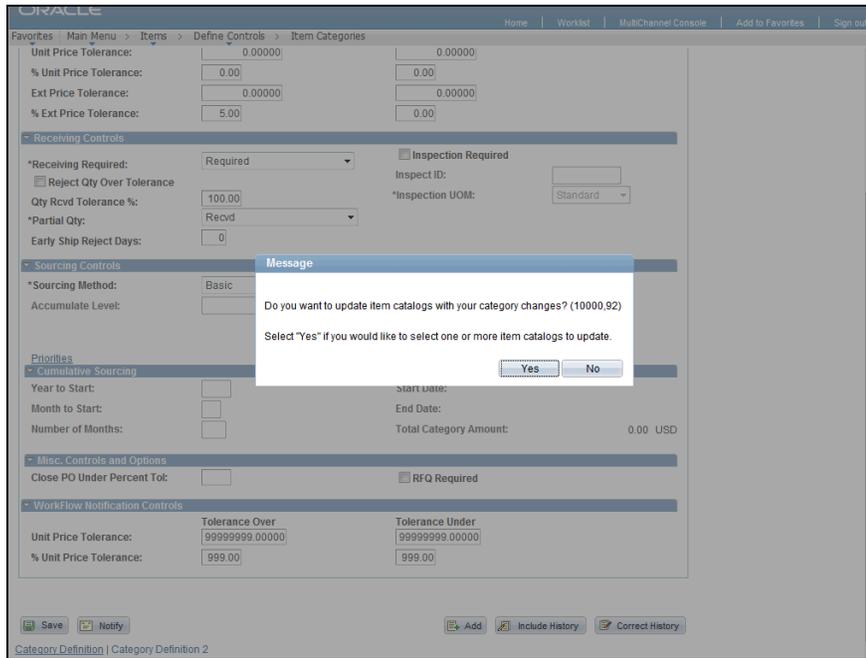
The screenshot shows the Oracle 'Item Categories' form. Key sections include:

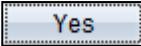
- Matching Controls:** Fields for Tolerance Over and Tolerance Under, with sub-fields for Unit Price Tolerance, % Unit Price Tolerance, Ext Price Tolerance, and % Ext Price Tolerance.
- Receiving Controls:** Includes 'Receiving Required' (set to 'Required'), 'Reject Qty Over Tolerance' (checkbox), 'Qty Rcvd Tolerance %' (set to 'Rcvd'), 'Early Ship Reject Days' (set to '0'), and 'Inspection Required' (checkbox) with 'Inspect ID' and 'Inspection UOM' (set to 'Standard').
- Sourcing Controls:** Includes 'Sourcing Method' (set to 'Basic'), 'Accumulate Level', and various factor percentages (Lead Time, Price, Ship to Priority, Vendor Priority) all set to '0.00'.
- Priorities:** 'Cumulative Sourcing' section with 'Year to Start', 'Month to Start', 'Number of Months', 'Start Date', 'End Date', and 'Total Category Amount' (0.00 USD).
- Misc. Controls and Options:** 'Close PO Under Percent Tol' (checkbox) and 'RFQ Required' (checkbox).

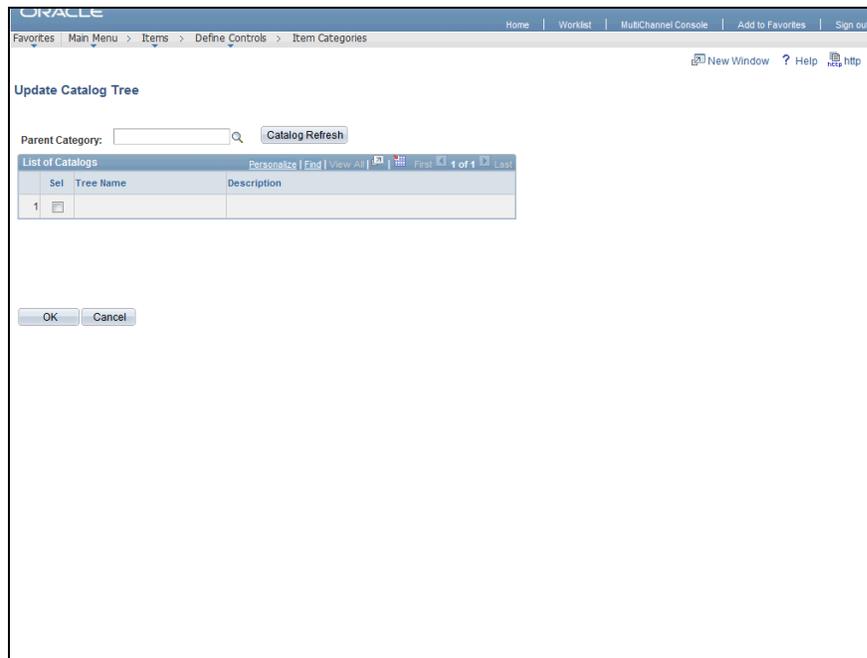
Step	Action
20.	AOC Procurement requires that users must receive all items purchased. Enter " 100 " into the Qty Rcvd Tolerance % field.
21.	To save the data you have entered you must save the page using the Save button. Click the Save button. 



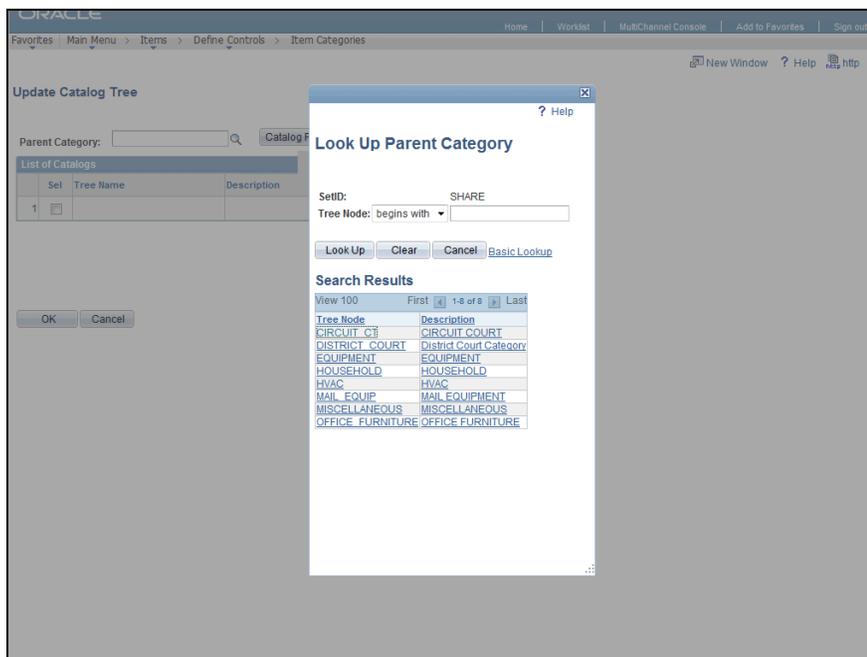
Step	Action
22.	<p>The system performs a series of validations against the data that you have entered and will generate messages based upon those checks.</p> <p>The system may generate a series of messages as it validates the data on the page.</p>
23.	<p>NOTE: When the system issues a warning message, the data will still be saved to the system. In this case, the system reports that an unexpected condition was found.</p> <p>When the system issues an error message, the data will not be saved. You need to update/correct the record as specified to save the page. Contact the help desk if the error persists.</p>
24.	<p>Click the OK button to close the message(s).</p> 



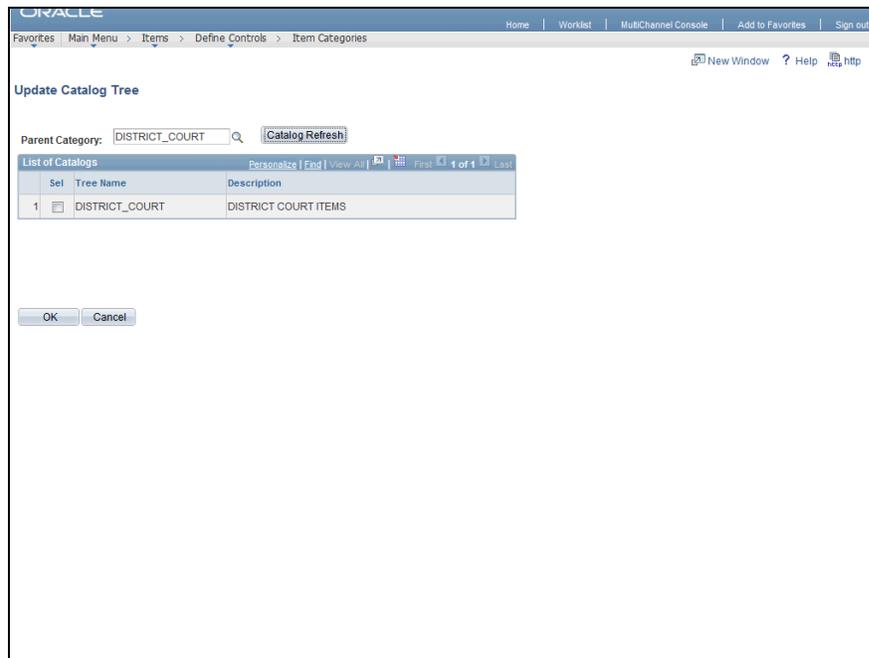
Step	Action
25.	<p>An additional system message (10000,92) displays to confirm that you want to associate the item category to an item catalog.</p> <p>NOTE: Item categories and catalogs are used together to control activity and to generate reports.</p> <p>Click the Yes button.</p> 



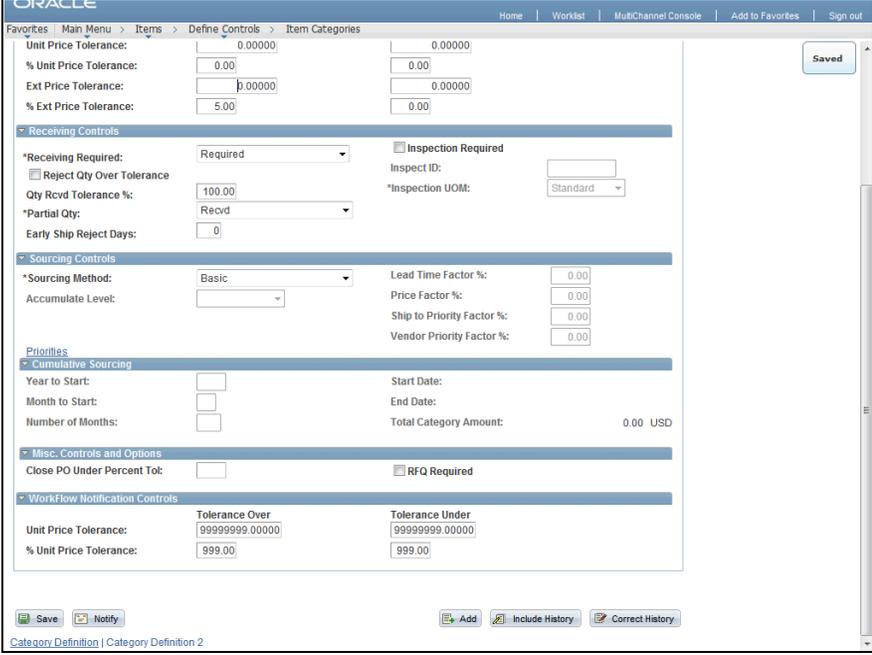
Step	Action
26.	<p>The Update Catalog Tree page displays.</p> <p>The system uses 'Trees' to relate Item categories and catalogs. In order to make these selections, you should be familiar with the Item catalog tree set-up/configuration in GEARS.</p> <p>If you need help updating the catalog trees, consult the Help Desk before proceeding.</p>
27.	<p>Select a parent category.</p> <p>Click the Look up Parent Category button.</p> 



Step	Action
28.	<p>The Look Up Parent Category window displays a list of parent categories from which to choose.</p> <p>Click the appropriate Tree Node link.</p> <p>DISTRICT COURT</p>
29.	<p>Click the Catalog Refresh button.</p> <p>Catalog Refresh</p>



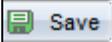
Step	Action
30.	The catalog(s) associated with the parent category (tree node) selected displays in the List of Catalogs section. Click the check box for the catalog you want to select. <input checked="" type="checkbox"/>
31.	Click the OK button to associate the item category to the catalog selected. <input type="button" value="OK"/>



The screenshot shows the Oracle 'Define Controls' page for Item Categories. The page is divided into several sections:

- Unit Price Tolerance:** 0.00000, % Unit Price Tolerance: 0.00, Ext Price Tolerance: 0.00000, % Ext Price Tolerance: 5.00.
- Receiving Controls:** *Receiving Required: Required, Reject Qty Over Tolerance: , Qty Rcvd Tolerance %: 100.00, *Partial Qty: Rcvd, Early Ship Reject Days: 0, Inspection Required: , Inspect ID: , *Inspection UOM: Standard.
- Sourcing Controls:** *Sourcing Method: Basic, Accumulate Level: , Lead Time Factor %: 0.00, Price Factor %: 0.00, Ship to Priority Factor %: 0.00, Vendor Priority Factor %: 0.00.
- Priorities:** Cumulative Sourcing, Year to Start: , Month to Start: , Number of Months: , Start Date: , End Date: , Total Category Amount: 0.00 USD.
- Misc. Controls and Options:** Close PO Under Percent Tol: , RFQ Required: .
- Workflow Notification Controls:** Tolerance Over: 9999999.00000, Tolerance Under: 9999999.00000, Unit Price Tolerance: 999.00, % Unit Price Tolerance: 999.00.

Buttons at the bottom include Save, Notify, Add, Include History, and Correct History. A 'Saved' button is also present in the top right corner.

Step	Action
32.	The Category Definition 2 page displays. NOTE: Changes that you have made are not actually saved to system records until you have clicked on the Save button and until the data has passed a series of data validation steps.
33.	Click the Save button. 
34.	You have successfully completed the <i>Adding an Item Category</i> topic. You have learned how to : - Create a new Item Category - Associate the category to an exiting item catalog End of Procedure.

2.2 Setting Up an Item

Over time, the Judiciary will need to be able to manage the items that are transacted in the system. GEARS provides the capability to add items to the system as required. Once the basic Item ID has been added, Inventory and Purchasing Attributes can also be added.

Assigning an Item ID

There are two methods that can be used to assign new Item IDs.

1. Judiciary-Defined Item ID: The preferred method is to determine a Judiciary-defined Item ID. This value is entered before adding item information.

2. **System-Generated Item ID:** The second method is to allow the system to assign the next sequential Item ID upon saving the item record. If the second method is used, the system verifies that the Item ID entered has not previously been used in the system. If it has been used, the system will simply skip that ID until it finds the next sequential ID that has not been used. In other words, the system has safeguards in place that will prevent a single Item ID from being assigned to more than one item.

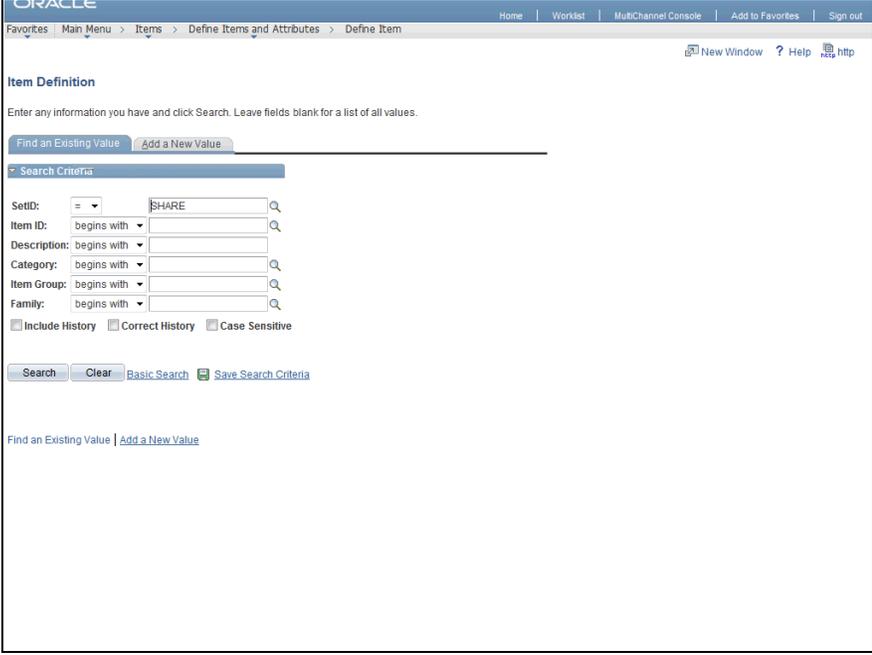
After completing this topic, you will be able to:

- Add a new item
- Assign a user-defined Item ID for the Item

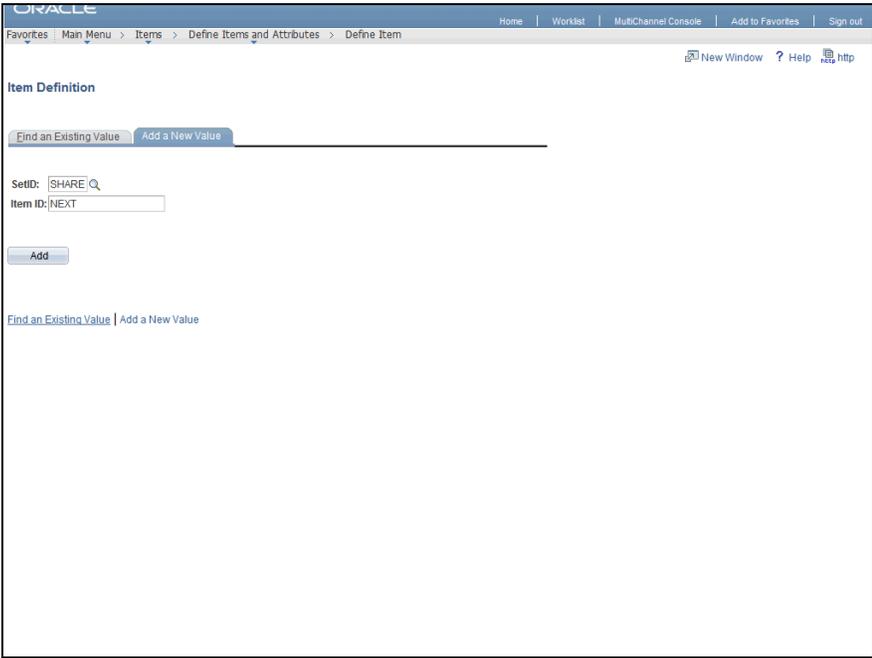
Procedure

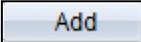
In this topic, you will add an item to the Item Master table. You will assign a previously defined Item ID for the item.

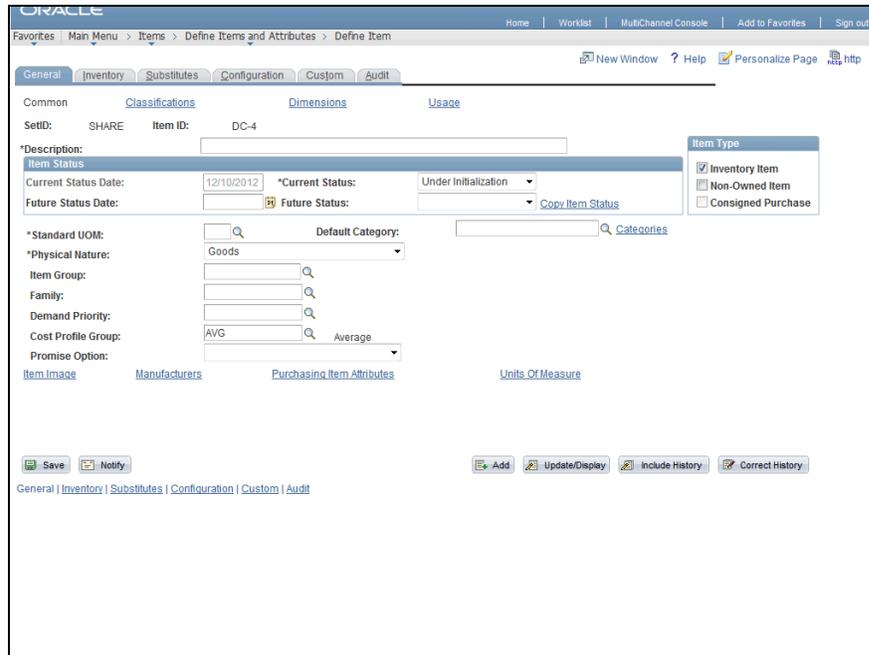
Step	Action
1.	Begin by navigating to the Item Definition page. Click the Items link. 
2.	Click the Define Items and Attributes link. 
3.	Click the Define Item link. 



Step	Action
4.	<p>The Item Definition - Find an Existing Value page displays.</p> <p>To add a new Item, click the Add a New Value tab.</p> 

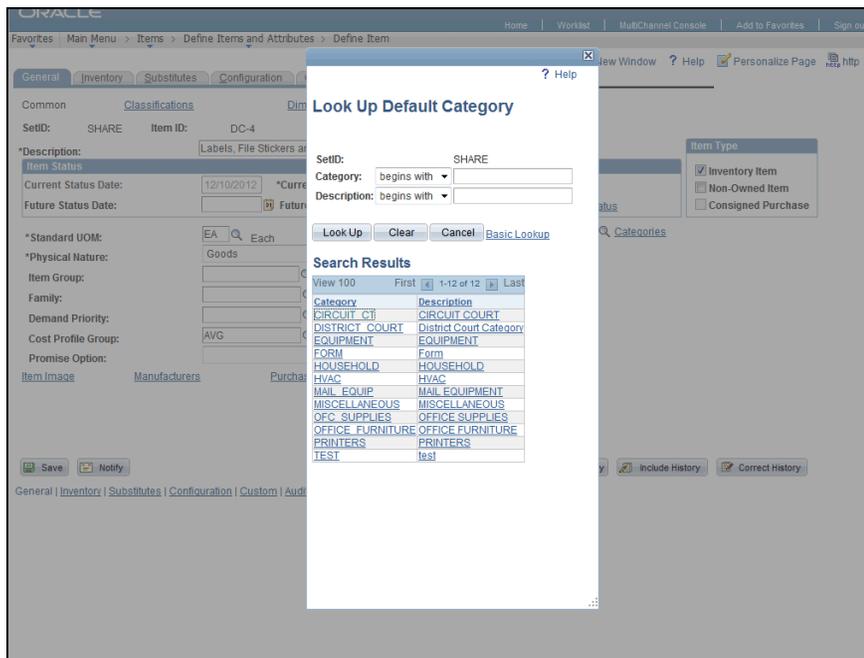


Step	Action
5.	The Item Definition - Add a New Value page displays. You can enter a user defined Item ID or allow the system to generate the next sequential Item ID for you. NOTE: It is preferred that a Judiciary-defined Item ID is assigned.
6.	For this topic, you want to assign a user-defined Item ID. Enter the Item ID into the Item ID field.
7.	Click the Add button. 
8.	The Define Item - General page displays. Enter and update general information about the item on this page including an item description, the current status, the Standard Unit of Measure

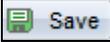


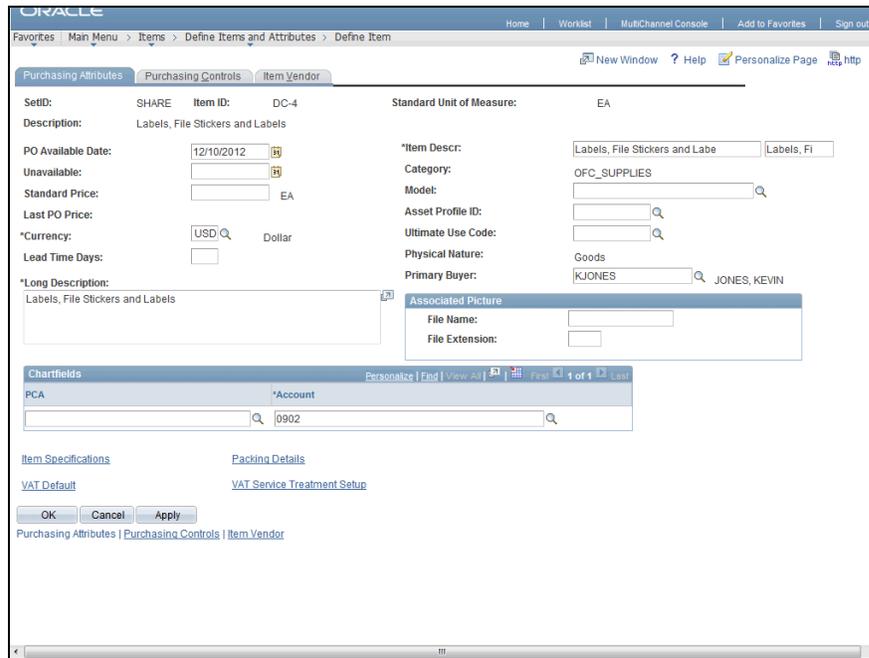
Step	Action
9.	Enter the item description into the Description field.
10.	Click the Current Status list. 

Step	Action
11.	In this step, you are changing the status of the Item ID from 'Under Initialization ' to 'Pending Approval'. Click the Pending Approval list item. 
12.	In the Standard UOM field, enter or look up and select the appropriate Standard Unit of Measure (UOM) to be assigned to the item. NOTE: The Standard UOM cannot be changed once transactions have been created that reference the item. Make sure that you have selected the correct Std UOM before saving this page.
13.	The Physical Nature field indicates where the item is a good or a service. Select the appropriate value (i.e., Goods or Services) from the list.
14.	Select the appropriate category. Click the Look up Default Category button. 

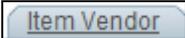


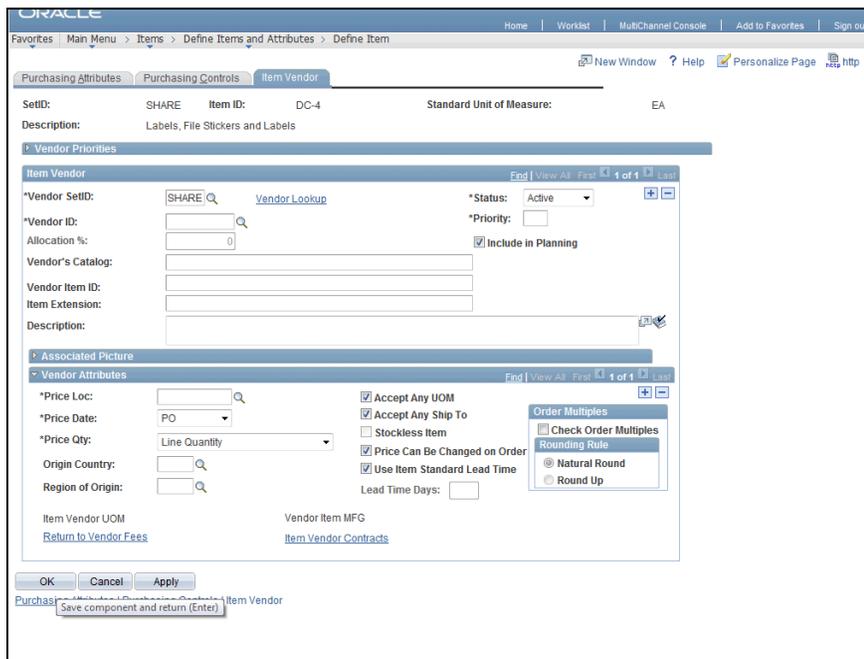
Step	Action
15.	The Look Up Default Category window displays. Click the appropriate category link for the item. 

Step	Action
16.	Click the Save button. 
17.	After entering the basic Item ID information, establish the specific Purchasing attributes for the Item. Click the Purchasing Item Attributes link.

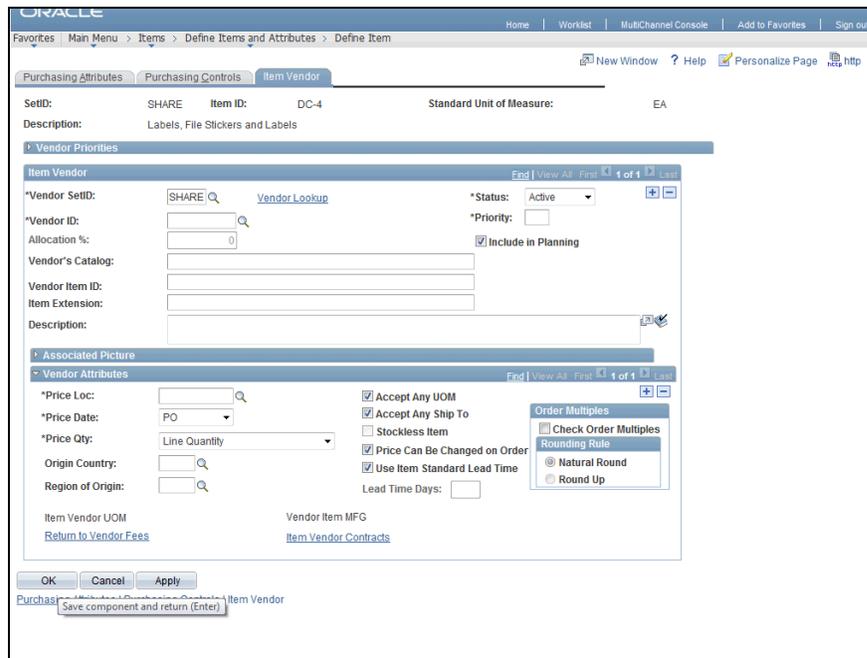


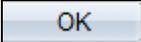
Step	Action
18.	The Purchasing Attributes page displays. Use the Purchasing Attributes page to document the status and description of the item(s) you are purchasing.
19.	The item's standard price is entered into the Standard Price field. For example, the standard price of the item could be the average price that the Judiciary has paid for the item or a price established through a procurement contract with a vendor.
20.	In the Chartfields section, assign default Chartfields for the item - including the Program Cost Account (PCA) and the Account (sub-object class) . When users enter transactions that reference the item, the Chartfields entered on this page default on the accounting (distribution) lines.
21.	Enter Program Cost Account (PCA) into the PCA field.

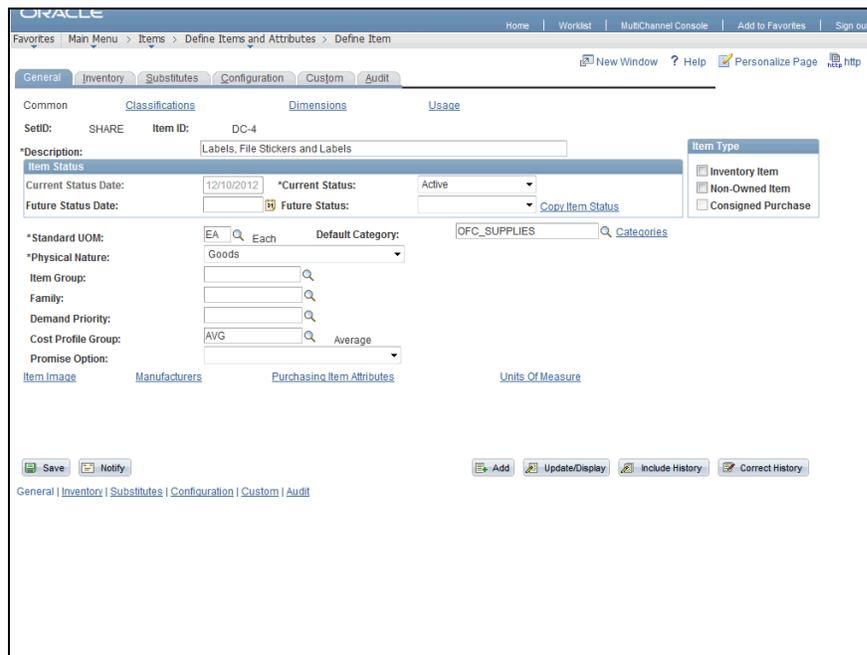
Step	Action
22.	Enter the Account (sub-object class) into the Account field. <input type="text"/>
23.	NOTE: You can review the purchasing controls defined during Item Category set-up on the Purchasing Controls page. The matching, receiving and other controls for the item display based on the default category selected on the Define Item - General page. Purchasing Controls are not updated when defining an item. Use this page for informational purposes only.
24.	Click the Item Vendor tab. 



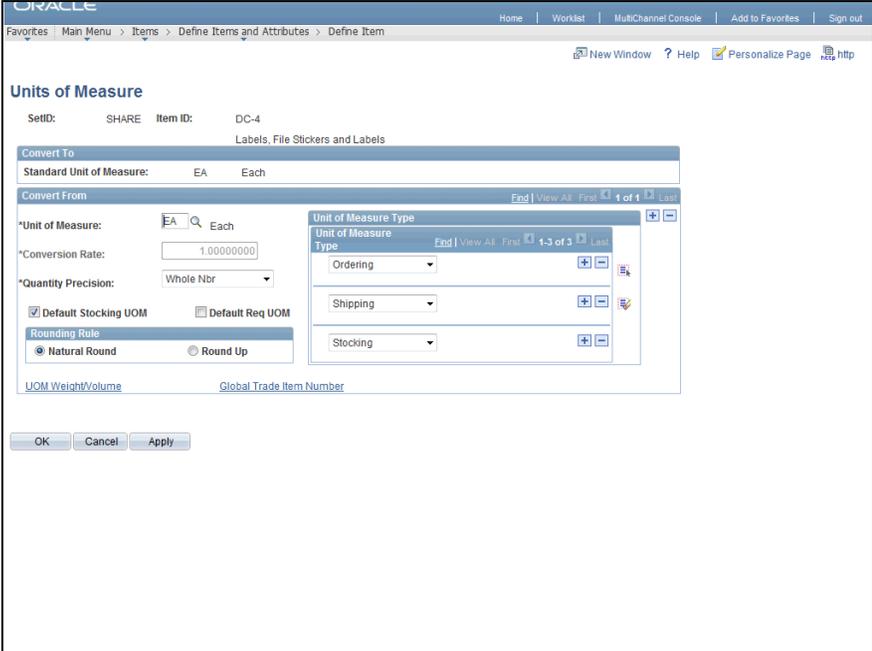
Step	Action
25.	The Item Vendor page displays. You can enter vendors and vendor information to establish an item-vendor relationship, if desired. More than one vendor can be associated with an item. Detailed procedures for entering vendors for an item are discussed in the <i>Adding a Vendor to an Item</i> topic.

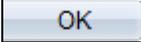


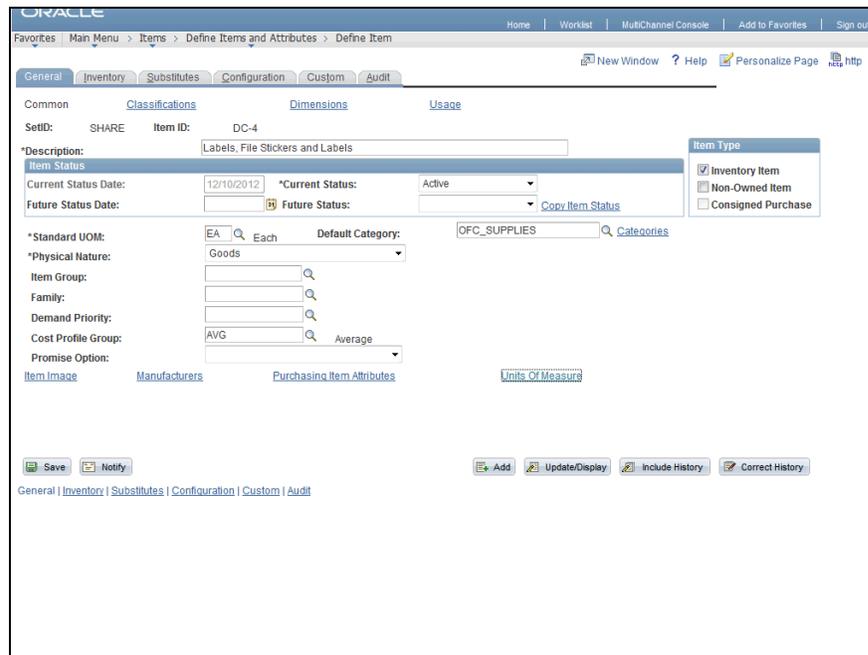
Step	Action
26.	Click the OK button to return to the Define Items - General page. 



Step	Action
27.	The Define Item - General page displays. Click the Units Of Measure link. 
28.	The Units of Measure page displays. Use this page to review the item unit of measure information. In GEARs, every item has one and only one Unit of Measure and that UOM will be used for ordering, stocking and shipping the item.

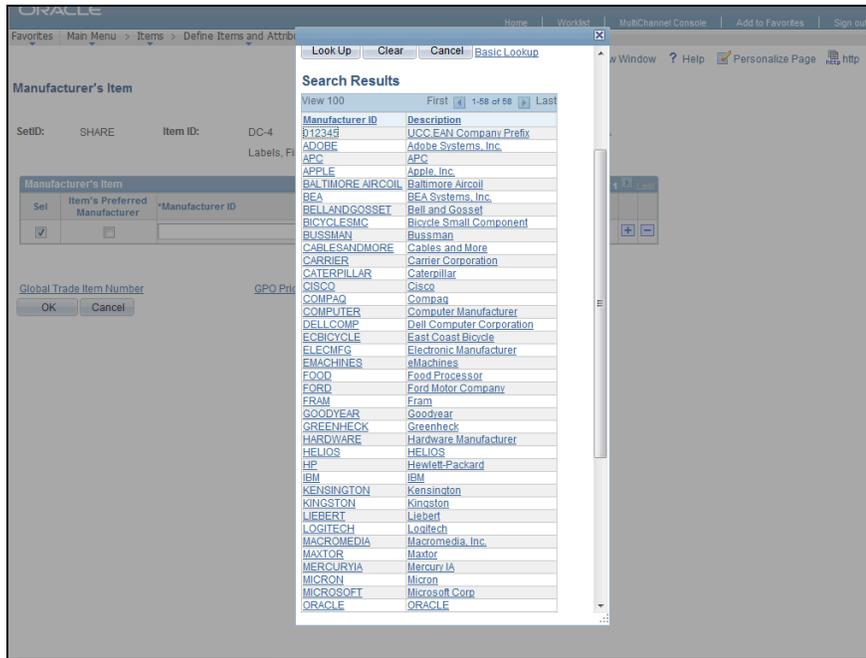


Step	Action
29.	Click the OK button when you are finished reviewing the page. 

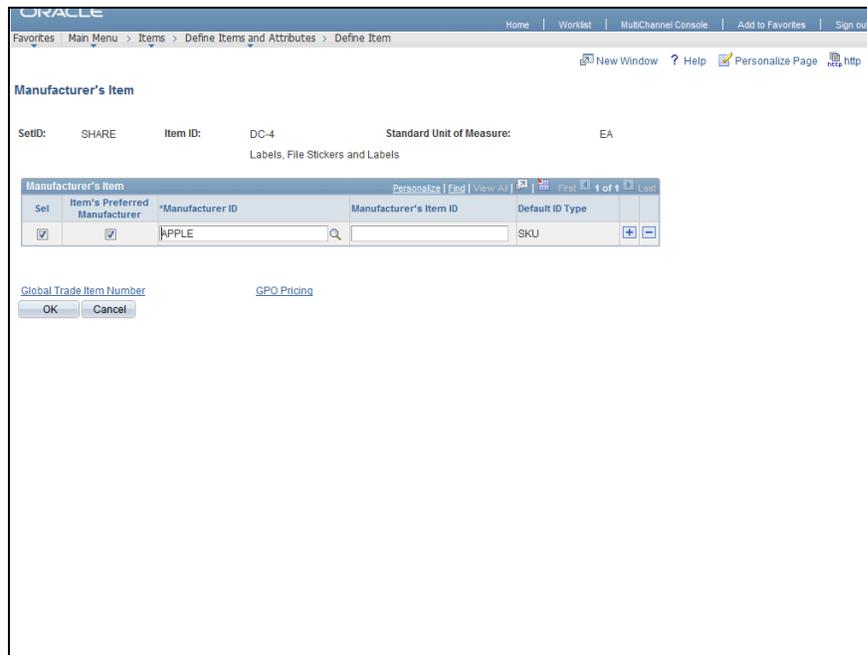


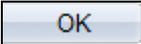
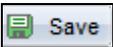
The screenshot shows the Oracle 'Define Item' page. The 'Manufacturers' link is highlighted with a red box. Other visible fields include 'SetID: SHARE', 'Item ID: DC-4', 'Description: Labels, File Stickers and Labels', 'Current Status Date: 12/10/2012', 'Current Status: Active', 'Physical Nature: Goods', and 'Standard UOM: EA Each'. The 'Item Type' section has 'Inventory Item' checked. At the bottom, there are buttons for 'Save', 'Notify', 'Add', 'Update/Display', 'Include History', and 'Correct History'.

Step	Action
30.	<p>If you have information regarding the manufacturer of the item, you can enter it on the Manufacturers' Item page.</p> <p>NOTE: This information is optional.</p> <p>Click the Manufacturers link.</p> 
31.	<p>The Manufacturers' Item page displays.</p> <p>Enter the Manufacturer ID and associated Item ID, if known.</p> <p>Click the Look up Manufacturer ID button.</p> 



Step	Action
32.	<p>The Look Up Manufacturer's ID window displays.</p> <p>NOTE: If the manufacturer you want to select is not listed in the search results, enter search criteria to narrow the results.</p> <p>Click the Manufacturer link.</p> <p>Apple, Inc.</p>



Step	Action
33.	The Manufacturer's Item ID field is free-form. There are no prompt values Enter the Manufacturer's Item ID into the Manufacturer's Item ID field, if known.
34.	Click the OK button. 
35.	Click the Save button. 
36.	You have successfully completed the <i>Setting up an Item</i> topic. You have learned how to : <ul style="list-style-type: none"> - Assign an Item ID - Enter general item information and purchasing attributes for an item - Enter a manufacturer's Item information End of Procedure.

2.3 Adding a Vendor to an Item

Associating a vendor to an Item allows the system to perform many automated Purchasing processes including the creation of Contracts, blanket purchase orders (BPO), standard purchase orders (POs), and Requests for Quotes (RFQs) for Items using the vendors identified as priority vendors or that have a contract established with the Judiciary to provide goods and services.

Assigning Items to vendors also gives the Judiciary the ability to limit the vendors that are authorized to sell specific items to Judiciary.

NOTES:

As a matter of policy, the GEARS system can be used without associating vendors to Items. When vendors are not associated with an item, a manual process outside of GEARS may be employed to track and manage vendors that provide items (goods and services) to the Judiciary.

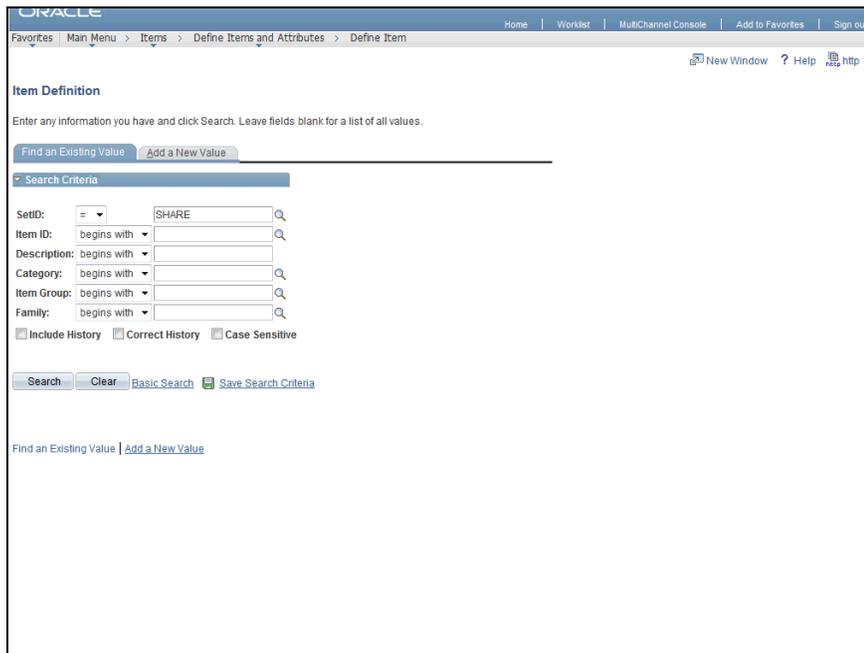
After completing this topic, you will be able to:

- Associate a vendor to an Item

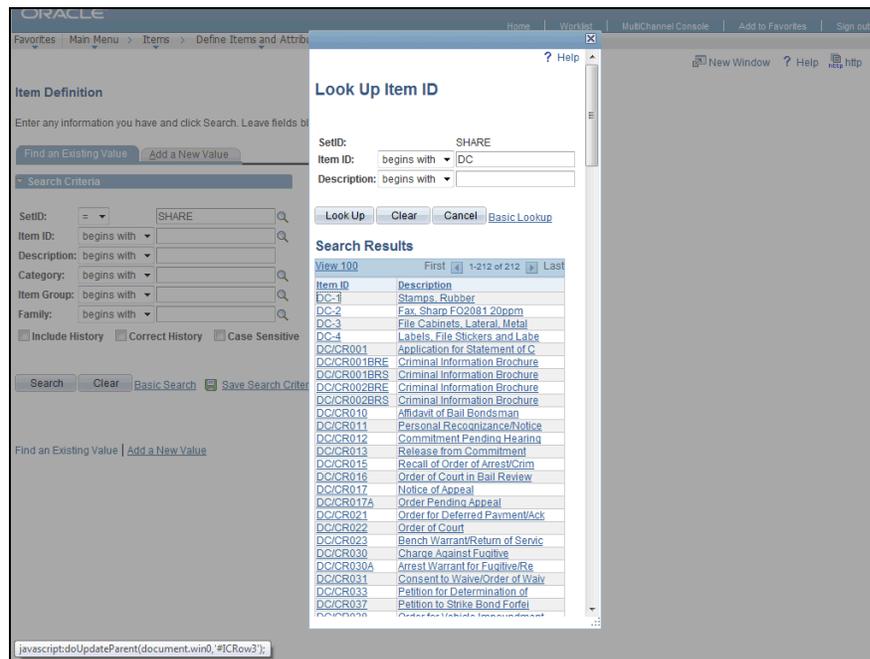
Procedure

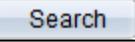
In this topic, you will associate a vendor to an item in the item Master.

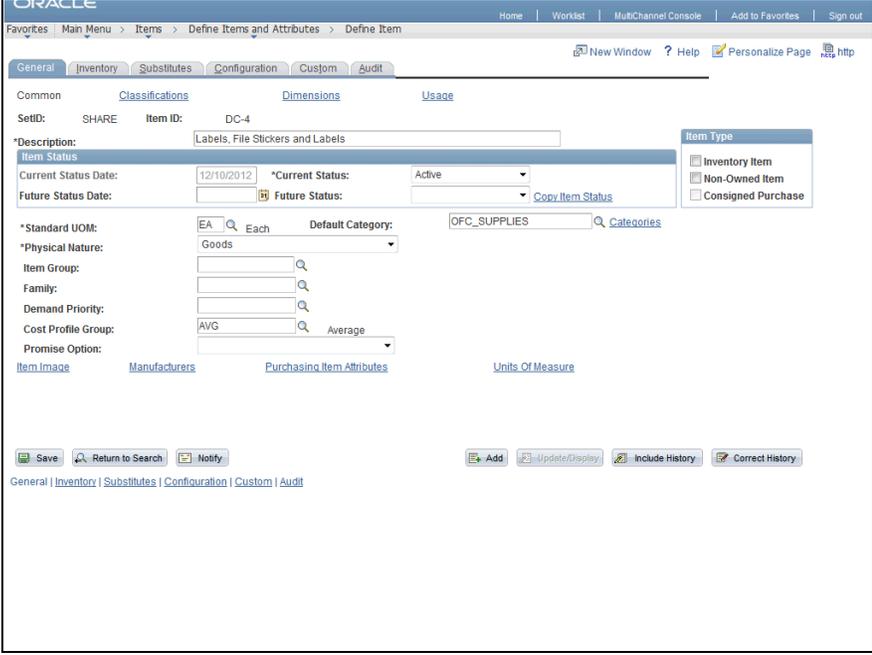
Step	Action
1.	Navigate to the Item Definition page. Click the Items link. 
2.	Click the Define Items and Attributes link. 
3.	Click the Define Item link. 



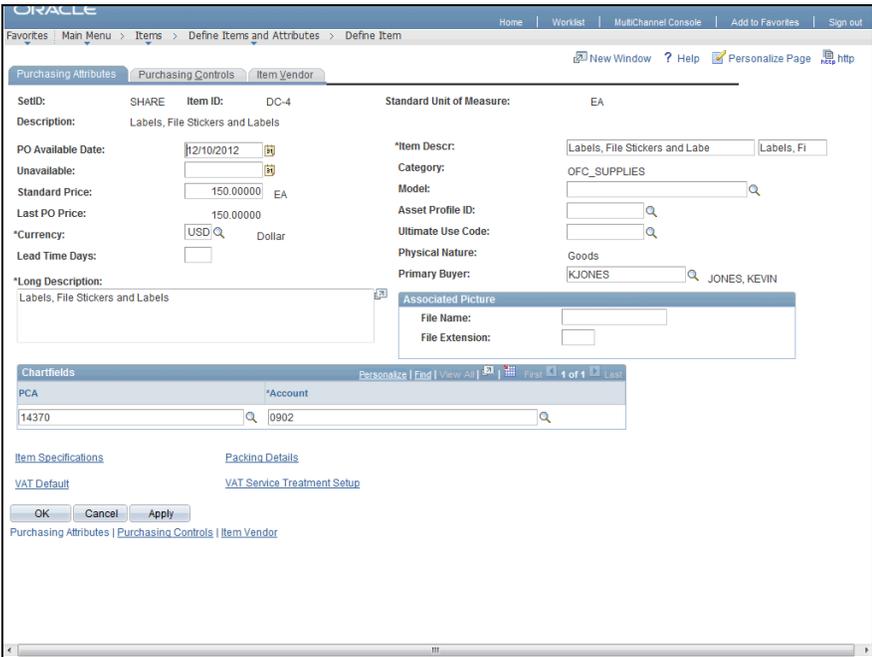
Step	Action
4.	<p>The Item Definition search page displays.</p> <p>Click the Look up Item ID (Alt+5) button.</p> 

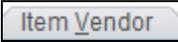


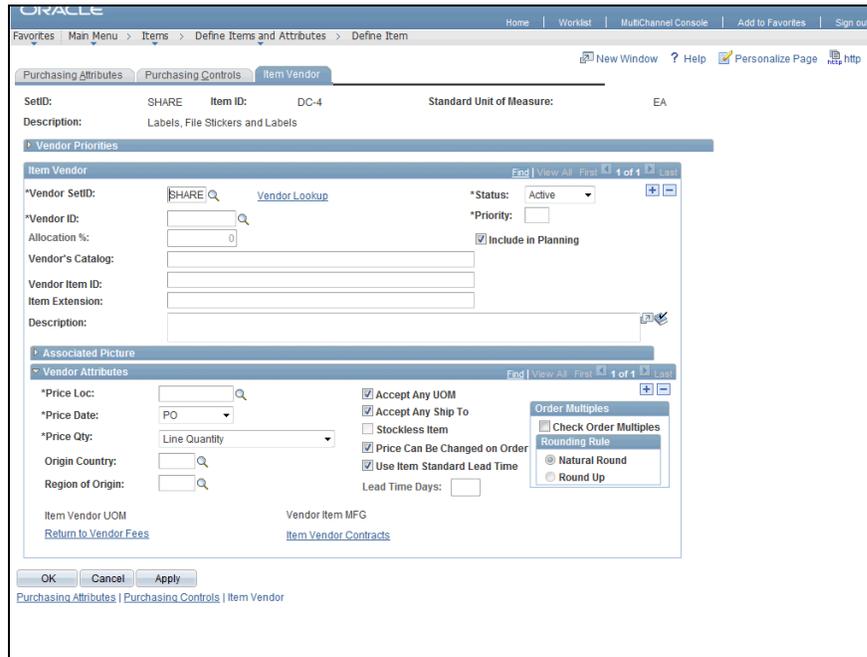
Step	Action
5.	<p>The Look Up Item ID window displays.</p> <p>In this example, click Item ID: DC-4, Labels, File Stickers and Label link.</p> 
6.	<p>Click the Search button.</p> 



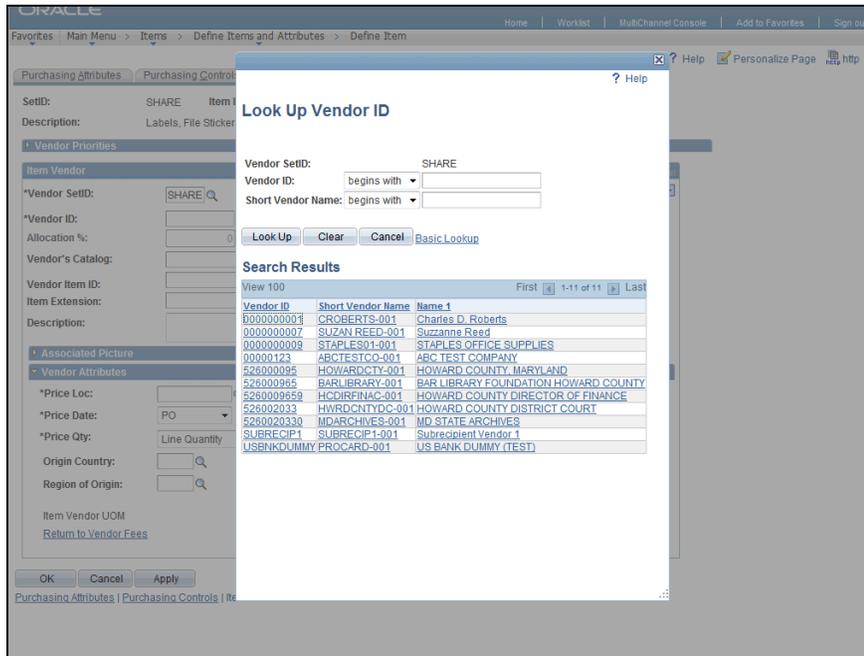
Step	Action
7.	<p>The Define Items - General page displays.</p> <p>Click the Purchasing Item Attributes link.</p> <p>Purchasing Item Attributes</p>



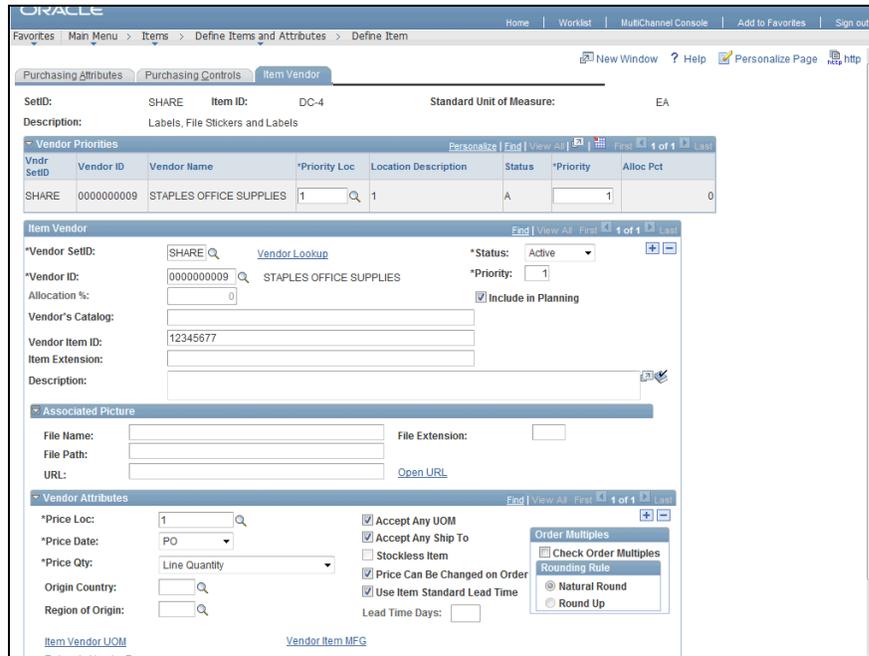
Step	Action
8.	Click the Item Vendor tab. 



Step	Action
9.	The Item Vendor tab displays. To add a new vendor the Item DC-4, click the Look up Vendor ID (Alt+5) button. 

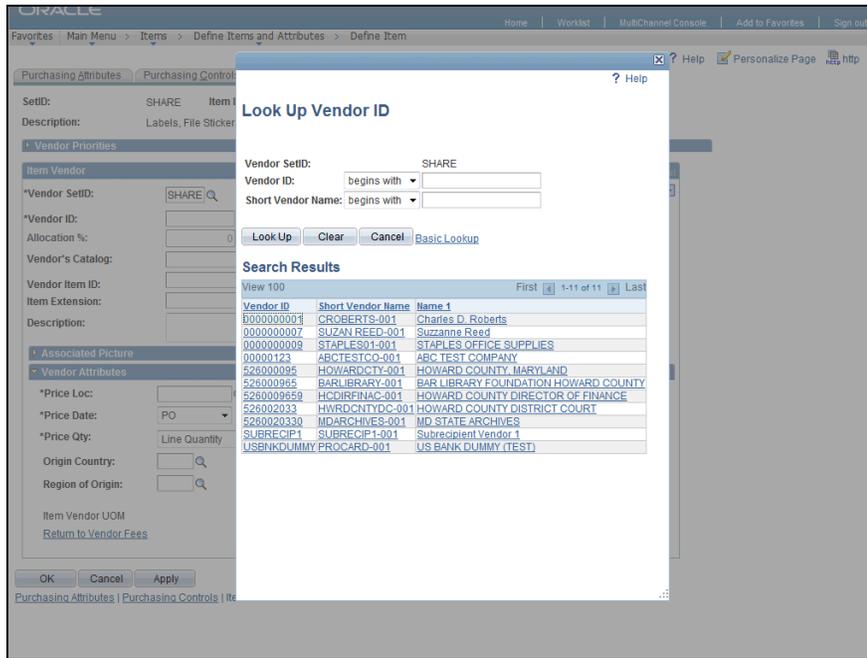


Step	Action
10.	The Look Up Vendor ID window displays. Click the STAPLES01-001 link. STAPLES01-001
11.	Enter the desired information into the Vendor Item ID field. For example, enter a valid value e.g. " 12345677 ". The system will not allow the same Vendor ID and Vendor Item ID to be associated with more than on AOC Item ID. If you attempt to do that, the system will generate an error message indicating that condition is not allowed.
12.	To view the Vendor Priority setting for item DC-4 vendors, click the Expand section button. 

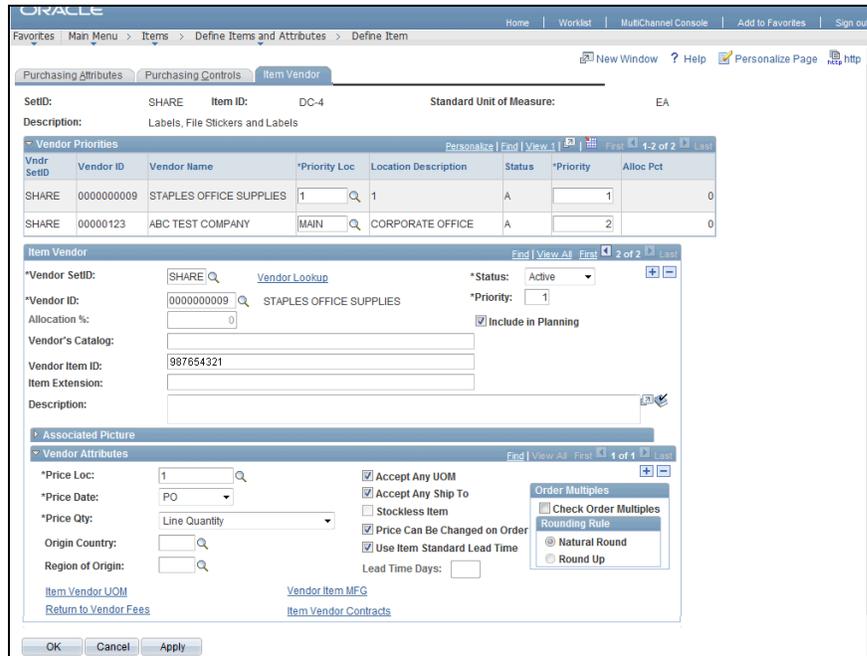


The screenshot shows the Oracle EBS 'Define Item Vendor' form. The 'Vendor Priorities' table has one row with Vendor SetID 'SHARE', Vendor ID '0000000009', Vendor Name 'STAPLES OFFICE SUPPLIES', Priority Loc '1', Location Description '1', Status 'A', Priority '1', and Alloc Pct '0'. The 'Item Vendor' section shows Vendor SetID 'SHARE', Vendor ID '0000000009', Vendor Name 'STAPLES OFFICE SUPPLIES', and Priority '1'. The 'Vendor Attributes' section includes fields for Price Loc, Price Date, Price Qty, Origin Country, Region of Origin, and various checkboxes like 'Accept Any UOM', 'Accept Any Ship To', 'Stockless Item', 'Price Can Be Changed on Order', and 'Use Item Standard Lead Time'. There is also a 'Rounding Rule' dropdown menu.

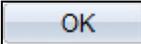
Step	Action
13.	NOTE: Since Staples is the only vendor for this item, its priority is set to 1 by default.
14.	To add another vendor to this item, click the Add a new row at row 1 (Alt+7) button. 
15.	To select another vendor to the item, click the Look up Vendor ID button. 

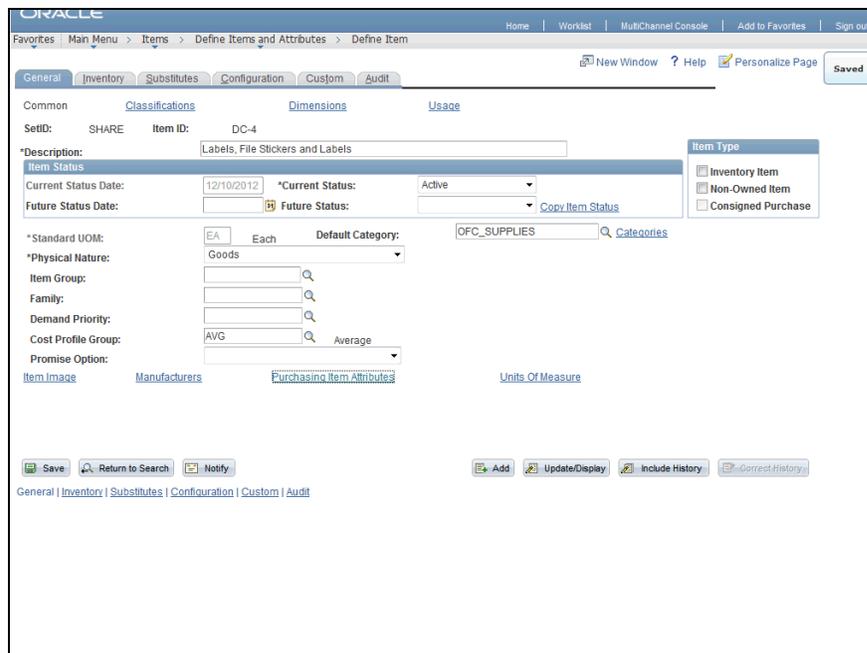


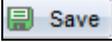
Step	Action
16.	The Look Up Vendor ID window displays. Click the ABCTESTCO-001 link. ABCTESTCO-001
17.	Enter the desired information into the Vendor Item ID field.
18.	Click the View All link. View All



Vndr SetID	Vendor ID	Vendor Name	*Priority Loc	Location Description	Status	*Priority	Alloc Pct
SHARE	000000009	STAPLES OFFICE SUPPLIES	1	1	A	1	0
SHARE	00000123	ABC TEST COMPANY	MAIN	CORPORATE OFFICE	A	2	0

Step	Action
19.	Now there are 2 vendors associated with item DC-4. Note the Priority field. Change the Priority, if needed.
20.	Click the OK button. 



Step	Action
21.	Click the Save button. 
22.	You have successfully completed the <i>Adding a Vendor to an Item</i> topic. You have learned how to: - Associate multiple vendors to an item - Enter/update vendor priorities End of Procedure.

2.4 Deactivating Vendors from an Item

Deactivating a vendor that is associated with an item allows you to prevent future purchases for that item from being sent to that vendor.

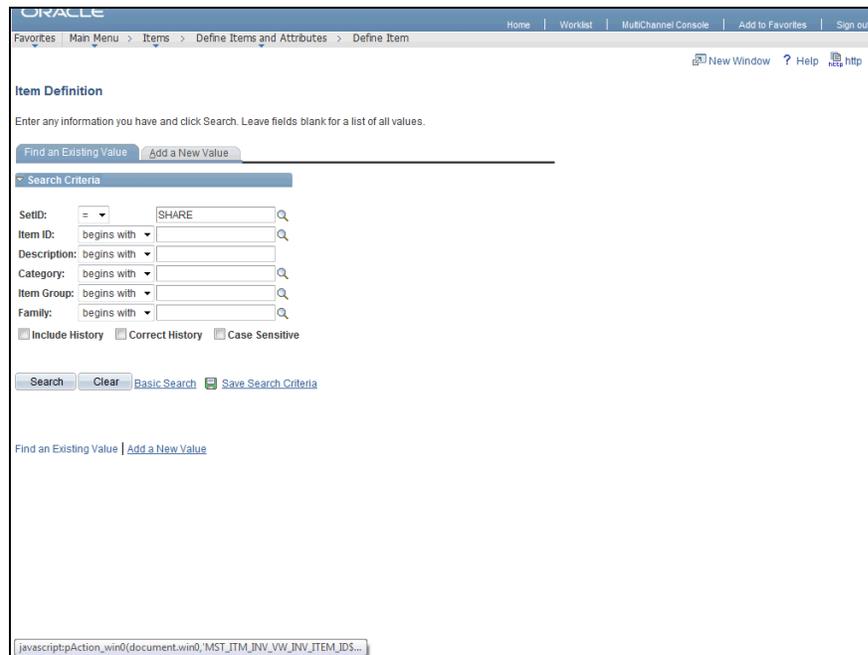
After completing this topic, you will be able to:

- Review vendors associated with an Item
- Inactivate a vendor for an item by updating the status to "Inactive"

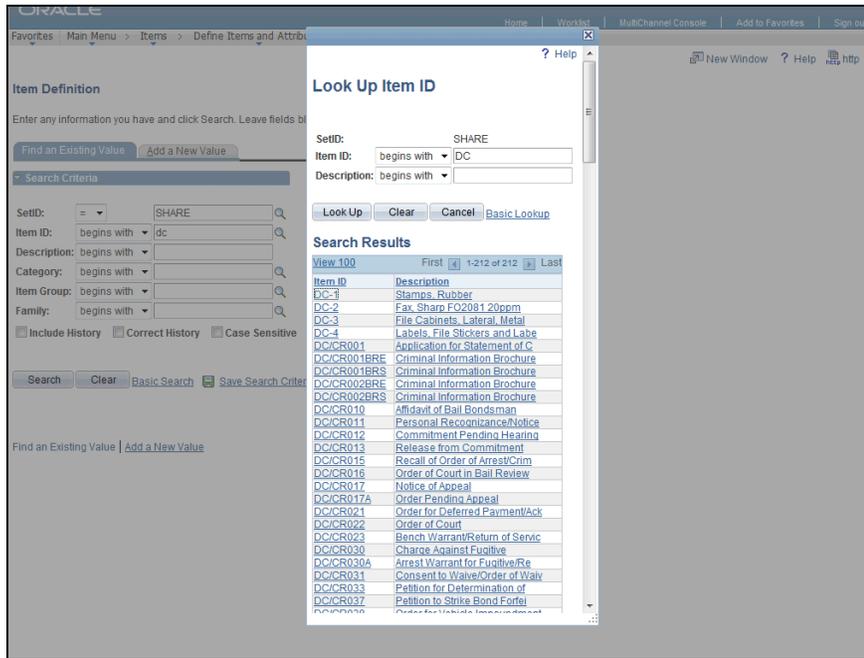
Procedure

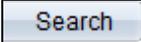
In this topic, you will "deactivate" an Item Vendor from the Item Purchasing Attributes pages.

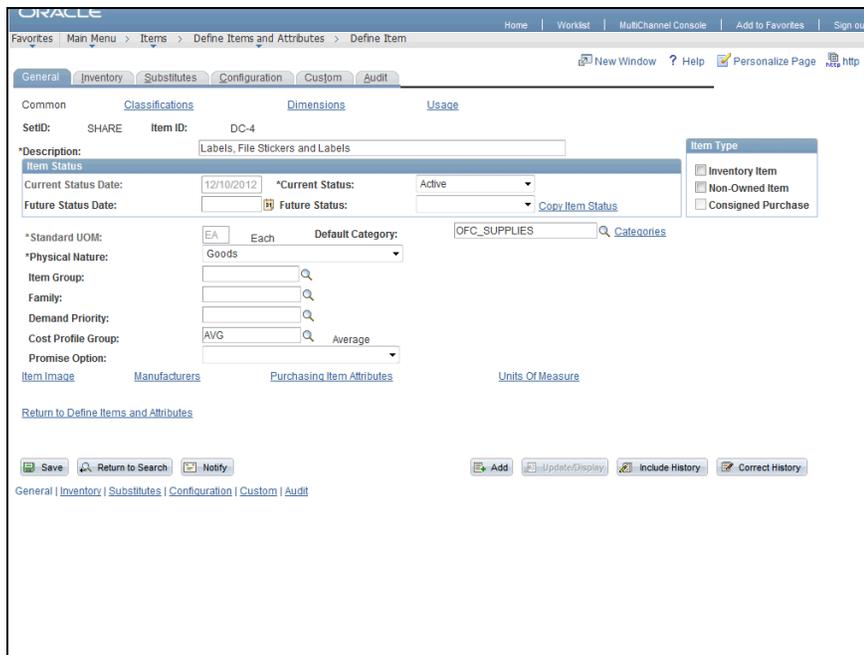
Step	Action
1.	Begin by navigating to the Item Definition search page. Click the Items link. 
2.	Click the Define Items and Attributes link. 
3.	Click the Define Item link. 



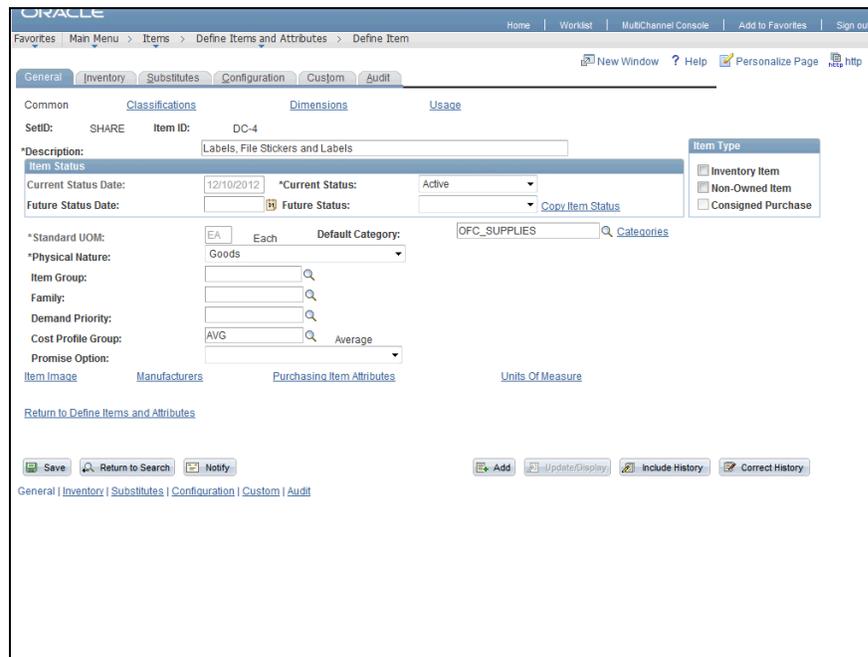
Step	Action
4.	<p>The Item Definition - Find an Existing Value page displays.</p> <p>NOTE: When de-activating an item, use the Find an Existing Value tab to search for the item for which you want to update item-vendor information.</p>
5.	<p>Enter search criteria to narrow the items retrieved by the system. Enter the Item ID, if known.</p>



Step	Action
6.	
7.	Click the Search button. 

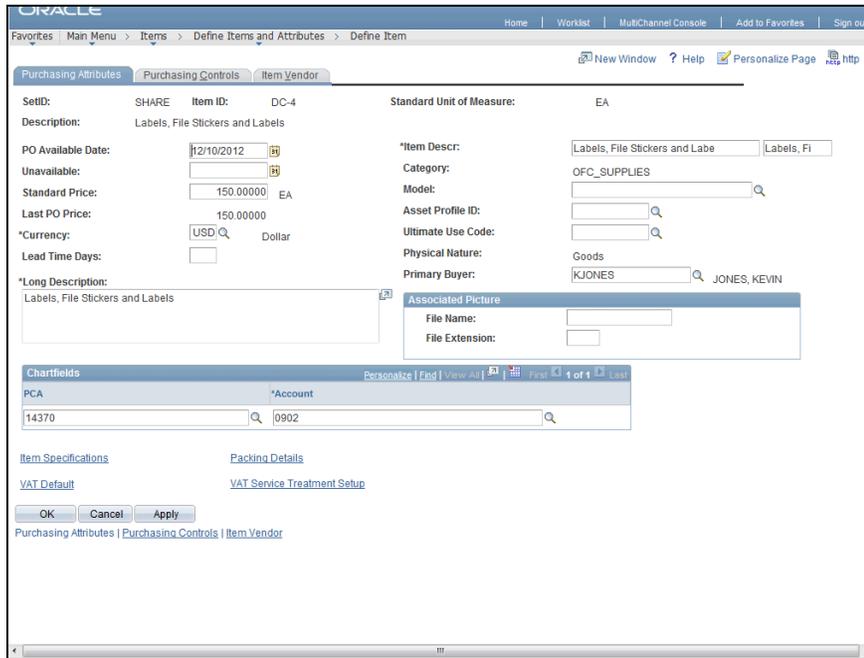


Step	Action
8.	The General page for the Item specified displays. NOTE: When the system only retrieves one item from the search, you will be directed to the General page for the item specified.



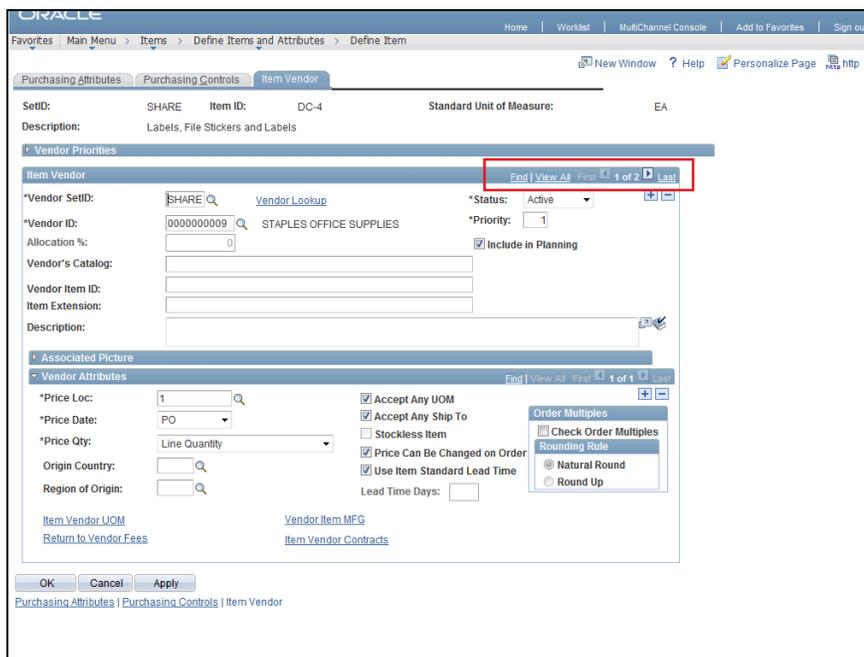
The screenshot shows the Oracle 'Define Item' page. The 'General' tab is active. The 'Item Status' is set to 'Active'. The 'Current Status Date' is 12/10/2012. The 'Future Status Date' is empty. The 'Standard UOM' is 'EA' and the 'Physical Nature' is 'Goods'. The 'Default Category' is 'OFC_SUPPLIES'. The 'Item Type' section has three checkboxes: 'Inventory Item' (checked), 'Non-Owned Item', and 'Consigned Purchase'. There are several links at the bottom: 'Item Image', 'Manufacturers', 'Purchasing Item Attributes', and 'Units Of Measure'. The 'Purchasing Item Attributes' link is highlighted in the original image.

Step	Action
9.	To access the Item Vendor information, click the Purchasing Item Attributes link. Purchasing Item Attributes

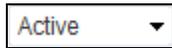
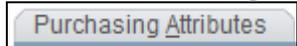


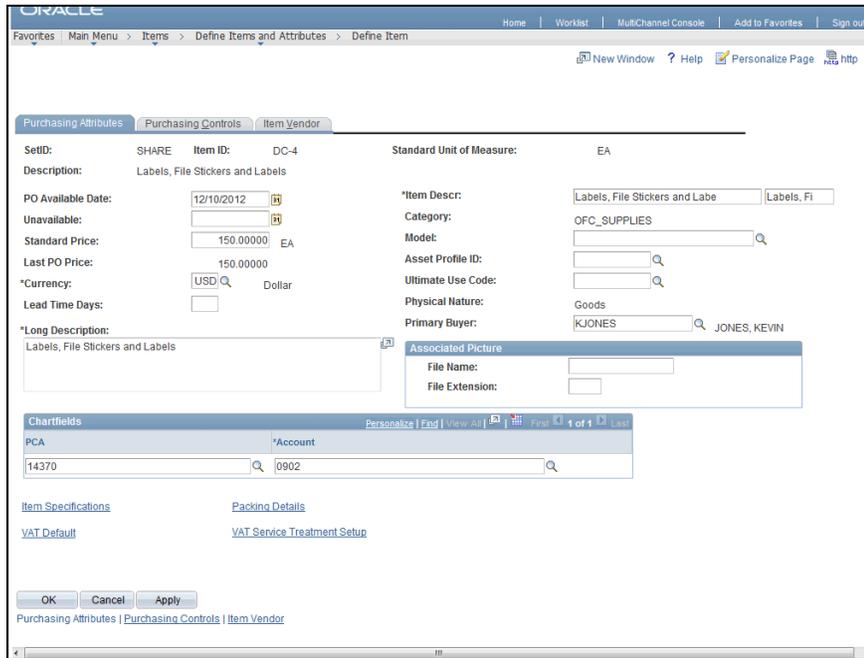
The screenshot shows the Oracle Purchasing Attributes page for the 'Item Vendor' tab. The page displays various fields for item details, including SetID (SHARE), Item ID (DC-4), Standard Unit of Measure (EA), and Description (Labels, File Stickers and Labels). It also shows pricing information like PO Available Date (12/10/2012), Standard Price (150.00000), and Currency (USD). There are search fields for Item Descr, Category, Model, Asset Profile ID, and Ultimate Use Code. A primary buyer is listed as 'JONES, KEVIN'. At the bottom, there are buttons for 'OK', 'Cancel', and 'Apply'.

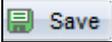
Step	Action
10.	<p>The Purchasing Attributes page for the Item displays.</p> <p>Click the Item Vendor tab.</p> 



The screenshot shows the Oracle Purchasing Attributes page for the 'Vendor' tab. It displays fields for Vendor SetID (SHARE), Vendor ID (0000000009), and Vendor Name (STAPLES OFFICE SUPPLIES). The status is set to 'Active' and the priority is '1'. There are checkboxes for 'Include in Planning', 'Accept Any UOM', 'Accept Any Ship To', 'Stockless Item', 'Price Can Be Changed on Order', and 'Use Item Standard Lead Time'. A 'Vendor Lookup' button is visible. At the bottom, there are buttons for 'OK', 'Cancel', and 'Apply'.

Step	Action
11.	<p>The Item Vendor page displays.</p> <p>There may be more than one vendor associated with the Item. You will need to select the correct vendor row to update.</p> <p>In the top right corner of the Item Vendor section, the system indicates the number of vendor rows.</p> <p>NOTE: To view each vendor and related information, use the arrows. You can also click the View All link to show all vendor rows on the page.</p>
12.	<p>Click the Expand Section button on the Vendor Priorities section to view the priorities assigned to vendors and the current status (e.g., Active, Inactive, To Be Deleted, etc.).</p> 
13.	<p>Click the Status list.</p> <p>After reviewing vendor rows and related information, change the status of the vendor you want to deactivate.</p> <p>Click the Status list.</p> 
14.	<p>To deactivate the vendor, click the Inactive list item.</p> 
15.	<p>Click the Purchasing Attributes tab.</p> 



Step	Action
16.	<p>The Purchasing Attributes page displays.</p> <p>Click the OK button.</p> 
17.	<p>The Define Items - General page displays.</p> <p>Save the updates made to the item record.</p> <p>Click the Save button.</p> 
18.	<p>You have successfully completed the <i>Deactivating Vendors from an Item</i> topic.</p> <p>You have learned how to:</p> <ul style="list-style-type: none"> - Review vendors and vendor information associated with an Item - Deactivate a vendor for an item by updating the status to "Inactive" <p>End of Procedure.</p>

Course Summary



Congratulations!

You have successfully completed the *PO210 Managing Items* course. In this course, you have learned how to:

- Navigate through and use the Item Master
- Add items and item categories
- Add a vendor to an item
- Inactivate a vendor associated with an item

We hope that you found this class informative, interactive, and fun. Check out other GEARS training courses, available on the GEARS website at <http://courtnet/gears/index.html> (<http://courtnet/gears/index.html>).

We are always looking for opportunities to improve our courses. If you have ideas on improving this course please share your feedback by sending us an email at gearstraining@mdcourts.gov (<mailto:gearstraining@mdcourts.gov>).