

State of North Dakota Item Training Manual

VERSION 8.4

3130 Kilgore Road, Suite 400
Rancho Cordova, CA 95670
916.669.3720
www.maximus.com



DISCLAIMERS

MAXIMUS ERP Solutions

Written by MAXIMUS, ERP Solutions Division, July 2004.

This training manual is considered to be proprietary and confidential and may not be reproduced for any reason other than stated below without prior written consent of MAXIMUS, ERP Solutions Division.

EXCLUSION

This training manual has been prepared exclusively for the State of North Dakota for the sole purpose of personnel training. Additional manuals may be reproduced and edited as needed for training purposes ONLY. All other uses are prohibited without prior written consent from MAXIMUS, ERP Solutions Division.

Copyright © 2004 MAXIMUS, ERP Solutions Division, Inc. All Rights Reserved.



TABLE OF CONTENTS

PEOPLESOFT OVERVIEW 2

OVERVIEW AND APPLICATIONS 2

ITEM DEFINITION 3

 Item Status 3

 Item Prompting 3

 Custom Item Attributes 3

DEFINING ITEM QUANTITY AND UNIT OF MEASURE 4

QUANTITY PRECISION AND ROUNDING RULES FOR ITEMS 6

ITEM CONTROL VALUES 7

DEFINING ITEMS AT THE SETID LEVEL 8

 General Item Information 8

 Defining Additional Item Attributes 11

 Defining Items At The SetID Level 13

 Define Items at the Business Unit Level 13

 Define Purchasing Attributes 15

REQUESTING A NEW ITEM ID 16

 Steps Required to Request a New Item 16

ITEM COPY 21

COPY ATTRIBUTES ACROSS UNIT 21

ITEM REPLENISHMENT 22

BUSINESS UNIT SETUP 22

 Setup Replenishment Page 22

 Setup Item Replenishment 22

 Item Replenishment Attributes Page 23

SETUP ITEM REPLENISHMENT PAGE 24

PEOPLESOFT OVERVIEW

OVERVIEW AND APPLICATIONS

In PeopleSoft 8, you will use your applications in a purely Internet environment. We call this environment *PeopleSoft Internet Architecture*. PeopleSoft Internet Architecture is a server-centric architecture that requires the installation of only a web browser on individual user machines (if one does not already exist).

PeopleSoft is designed to integrate all financial applications. That is, the applications may share the same relational data structure, data tables, user interfaces, reporting tools, and customization capabilities. PeopleSoft pages also display the same familiar table-driven and effective date-driven designs throughout its applications.

The system offers a compliment of applications that cover most financial needs. PeopleSoft Financials for Public Sector consists of the following applications (modules):

- Accounts Payables
- Accounts Receivables
- Asset Management Billing
- Budgets
- General Ledger
- Inventory
- Order Management
- Project Costing
- Purchasing
- Workflow

ITEMS

ITEM DEFINITION

The Item master is a key component of PeopleSoft. The item master affects transactions in nearly every supply chain module. At the State of North Dakota, the Purchasing, Inventory, Payables and Billing Modules will all use items to some extent.

ITEM STATUS

Item status determines which item transactions can be performed in Supply Chain Management applications. By changing an item's status you can control, for example, whether items can be included on sales orders, material stock requests, requisitions, and purchase orders. You can also control whether an item can be picked and shipped, used in production, or replenished. The item status defined at the business unit level determines which item transactions are permitted in PeopleSoft Inventory, Manufacturing, Production Planning, and Enterprise Planning. Valid item transactions in PeopleSoft Purchasing are determined by the item status at the setID level, except when the Inventory business unit is referenced on requisitions or purchase orders.

ITEM PROMPTING

To help keep large item masters manageable at the transaction level, PeopleSoft item prompts are designed to display only items that are valid for the transaction that you are performing. Items are filtered by status of the item at the business unit level. If the status of an item does not meet the status requirement of the transaction, the item is not included in the valid values accessed from the item ID field on the transaction page.

CUSTOM ITEM ATTRIBUTES

To capture item attributes specific to your business, PeopleSoft provides generic numeric and alphanumeric item attribute fields at both the setID and business unit level. Using Application Designer, you can modify the field labels to represent their function in your system.

As with other item attributes, custom attributes that you enter at the setID level automatically change to the business unit, where they can be modified. Custom attributes are updated by the Item Loader processes and can be copied using the Item Copy page. Custom item attributes are included on the Basic Item Listing Report and in the Define Item outbound EIP. You can add these fields to existing reports or to your custom reports.

For the set ID, define custom item attributes on the Define Item — Custom: Character page and the Define Item — Custom: Numeric page. The values that you define automatically change to the business unit level. You can modify these attributes on the Define Business Unit Item — Custom: Character page and Define Business Unit Item — Custom: Numeric page.

DEFINING ITEM QUANTITY AND UNIT OF MEASURE

All PeopleSoft applications use units of measure (UOM) to quantify resources. In PeopleSoft Inventory, they enable you to quantify and track inventory items. Suppose that you stock items in boxes of 12 and in cases of 60; the boxes and the cases are prepackaged; and you do not allow your warehouse personnel to break the packaging. You can stock item quantities in both these units of measure and track them as they move through your warehouse.

You can use different units of measure to conduct different types of transactions. For example, you might order an item by the case but store it in your warehouse and ship it to customers either by the box or as individual entities. You can track all of these transactions in your system by setting up quantity units of measure for ordering, stocking, and shipping, in addition to the required standard unit of measure. To facilitate processing, PeopleSoft maintains conversion rates between the standard UOM and the various other UOMs.

Standard Unit of Measure

The standard unit of measure represents the most common unit of measurement for an item and should be the item's smallest valid unit of measure. The standard UOM must be valid for ordering, stocking, and shipping. Because PeopleSoft Inventory maintains item quantity on hand and costs in the standard unit of measure and uses this unit in quantity-on-hand and costing calculations, you cannot change the standard UOM once you have performed transactions involving the item.

When you define an item's standard UOM on the Define Item — General: Common page, PeopleSoft Inventory automatically assigns a conversion rate of 1.000 for stocking, shipping, and ordering transactions. While you can modify conversion rates for the other units of measure defined for the item, you cannot override this base conversion rate.

Stocking Unit of Measure

The stocking unit of measure describes how you store quantities of an item in your warehouse. You can use the stocking UOM for a variety of transactions, including putaway, transfers, container management, adjustments, picking, and ordering.

When you assign units of measure to an item on the Units of Measure page, indicate whether each UOM is valid for ordering, shipping, or stocking transactions. If more than one UOM is valid for stocking, specify which of these should be the default stocking UOM. PeopleSoft automatically selects the standard UOM as the default stocking UOM, but you can change this value to any valid stocking UOM. The one exception is serial-controlled items, for which the only valid stocking UOM is the standard UOM. Each item can have only one default stocking unit of measure.

The Purchasing Receiving pages, the InterUnit and RMA Receiving pages, the Manual Staging page, and the Express Putaway page automatically use an item's default stocking UOM, but you can override the default and enter any valid stocking UOM for the item.

You can maintain multiple stocking units of measure for an item, but because you must identify the UOM for every transaction using the item, doing so requires that you track each UOM physically. To simplify your warehouse operations, store the item in one unit of measure.

For example, suppose that Item A has a standard UOM of each (EA) and two stocking UOMs: each and case (CS). Assume that one CS equals 12 EA. To transfer all of Item A from one storage location to another, create two transactions—one to transfer the quantity stocked in EA and the second to transfer the quantity stocked in CS. If your picking plan calls for two cases of Item A to be picked, and you have 12 EA and one CS, create two picking feedback transactions—one to pick 12 EA and the second to pick one CS.

If, however, you define one stocking UOM for Item A, create only a single transaction for either of these material movements. You can still have an ordering UOM of CS, allowing you to order two CS. The difference is that, in the picking example above, you can enter a single picking feedback transaction using the ordering UOM of CS. The system automatically converts to the single stocking UOM to find the correct quantity to fill the picking request.

Ordering Unit of Measure

Define an ordering unit of measure if you order quantities in a unit of measure other than the standard UOM. You can use the ordering UOM to create material stock requests, sales orders, and purchasing requisitions.

You cannot change the ordering unit of measure for an item if an open order containing the item exists in PeopleSoft Inventory.

Shipping Unit of Measure

Define a shipping unit of measure if you ship quantities in a unit of measure other than the standard UOM. The shipping UOM is used on the Packing Session pages and on the Shipping/Issues component.

You cannot change the shipping unit of measure for an item if an open order containing the item exists in PeopleSoft Inventory.

Associating Items With Units of Measure

You set up relationships between items and units of measure at both the setID level and the business unit level.

To associate items with units of measure:

1. Establish units of measure for the setID.

Define units of measure on the Units of Measure page in the Set Up Financials/Supply Chain - Common Definitions menu. All UOMs must be defined here before they are available anywhere else in the system.

2. Define the standard unit of measure for each item within the setID.

Using the Define Item — General: Common page, assign each item a standard UOM that reflects the item's most common unit of measurement.

Warning! To minimize rounding discrepancies when using multiple units of measure, PeopleSoft strongly recommends that your standard UOM be the smallest valid unit of measure for the item.

3. [Define additional units of measure for each item within the setID.](#)

Using the Units of Measure page in the Define Items menu, define valid UOMs for ordering, stocking, and shipping each item. As part of this definition, identify the default stocking unit of measure, specify conversion rates between the standard UOM and the additional UOMs, and set up quantity precision rules for use in system calculations.

For each unit of measure, define corresponding stocking and shipping parameters on the UOM Weight/Volume page. To access this page, click the UOM Weight/Volume link on the Units of Measure page in the Define Items menu.

4. [Define any unit of measure attributes that vary according to business unit.](#)

Define a standard pack UOM on the Define Item — Inventory: Shipping/Handling page. This is the only unit of measure that you define at the business unit level rather than at the setID level.

If stocking, ordering, and shipping UOMs and their corresponding stocking and shipping parameters differ according to the business unit, define this information on the Define Business Unit Item — Inventory: Weight/Volume page.

QUANTITY PRECISION AND ROUNDING RULES FOR ITEMS

In this section, we discuss how to:

- Define rounding exceptions.
- Set up quantity precision and rounding rules.

Quantity Precision

Quantity precision rules enable you to indicate whether entered and calculated quantities for an item-UOM combination should be expressed as whole numbers or decimals. If you specify a whole number quantity precision, all quantities involving the item-UOM combination are stored in the database and appear on pages and reports as whole numbers. (Zeros still appear in the decimal places, however, so that you will see 5.0000 rather than 5). If you specify a decimal quantity precision, quantities are stored and appear as decimals carried out to four places.

Quantity precision is set at the Inventory setID and item-UOM levels and is defined on the Units of Measure page in the Define Items menu.

Whenever you enter a quantity for an item-UOM combination, PeopleSoft verifies whether your entry conforms to the quantity precision rules that you've specified. If you enter a decimal value for a

combination requiring whole numbers, an error message appears. For example, if "each" values (EA) of a computer are defined to be whole numbers, you cannot enter a quantity of 1.5 EA.

You can always change a whole number precision to a decimal precision, but you cannot always change a decimal precision to a whole number precision. Once you have completed certain transactions involving the item—any putaway operation, any order placed against the item, or any adjustment—you cannot make this change.

ITEM CONTROL VALUES

With PeopleSoft Inventory, you can organize or group inventory items according to many different characteristics, which we call *attributes*. To set up your item attributes, use the pages in the Define Controls menu. Once defined, these attributes will become selection options or defaults on pages used for defining new items.

Item Default Values - Establish item attribute defaults that are automatically assigned to each new item. All inventory items in the setID can share these attributes.

Item Families - In PeopleSoft Inventory, you can categorize items by groups and families. No formal relationship exists between item groups and item families, but you can use an item family to further classify an item group if you wish. For example, you can further define the hardware group as consisting of families of fresh-water equipment and salt-water equipment.

The information defined on the Item Family page is used on the Define Item — General: Common page, when setting up cycle counting events on the Event Creation Process page, as an alternate search key for item ID, and as a selection criteria when running the Inventory Value report, Cost Profiles report, Basic Item Listing report, and Stock Status Report.

Item Groups - The information defined on the Item Group page is used on the Define Item — General: Common page as an alternate search key for item ID, when defining account distributions, and as a selection criterion when running the Inventory Value report, Cost Profiles report, Basic Item Listing report, and Stock Status report. In manufacturing environments, item group information can also be specified on the Group Routing Assignment page.

Replenishment Classes - Create groupings for items that are subject to automated periodic replenishment within your business unit. The information defined on this page is used on the Define Business Unit Item— Inventory: Replenishment page, the Replenishment Parameters page, and the Replenishment Options page.

Stock Types - Create ownership information codes for items that are leased or consigned. A stock type must be assigned during putaway of non-owned items. The information defined on this page is used on the Define Item — General: Classifications page, the Item Templates page the Define Item — Inventory: Shipping/Handling page, the Manual Staging page, and the Express Putaway page.

Utilization Type - Establish utilization types for the utilization analysis of your inventory items.

DEFINING ITEMS AT THE SETID LEVEL

Use the Define Item component to establish an item ID and the corresponding attributes for a setID. You can either define the item attributes from scratch or modify item attribute default or template information that you set under the Define Controls menu.

GENERAL ITEM INFORMATION

Item ID	Item IDs cannot have embedded spaces or special characters. If you use automatic numbering for your items, leave the item ID as <i>NEXT</i> , to assign the next sequential number, or enter an item ID manually. PeopleSoft Inventory uses the item ID as its primary search key for the item master file.
Current Status Date	If you modify the item status, the current status date will automatically update to reflect the date of your change.
Current Status	Select a value: <i>Under Initialization</i> , <i>Pending Approval</i> , <i>Denied Approval</i> , <i>Active</i> , <i>Hold</i> , <i>Discontinue</i> , or <i>Inactive</i> . However, you can select only a subset of these status values. If the item is <i>Under Initialization</i> , you can set the Current Status to <i>Pending Approval</i> . Once the item definition has been approved, either automatically or manually, you can set the status to <i>Hold</i> or <i>Discontinue</i> or change it back to <i>Active</i> .
Future Status Date and Future Status	Schedules item status changes that will be implemented by the Item Status Change process. Note. You cannot select a future status of <i>Inactive</i> for certain items. If an item is defined for a business unit as used in manufacturing on the Define Business Unit Item — General: Costing page (Used for MFG option), it cannot be inactivated at the business unit or the setID level.
Copy Item Status	Click to access the Copy SetID to BU Item Status page, where you can copy the item status that you modified for the setID to any of the business units where the item is defined.
Inventory Item	Indicates that the item is physically stocked in inventory. This selection appears by default from the setID level, and you cannot override it. The attributes that you enter for a non-inventory item at the business unit level are limited to support PeopleSoft Manufacturing, PeopleSoft Enterprise Planning, and PeopleSoft Production Planning. This enables you to add non-inventory items such, as documentation or user manuals,

	<p>to the BOM. Additionally, you can create forecasts at a family or group level by defining planning items and planning BOMs. You cannot create transactions for non-inventory items in PeopleSoft Inventory.</p>
<p>Non-Owned Item</p>	<p>This selection defaults from the Defining Purchasing Item Categories to the business unit level and can be overridden on the Define Business Unit Item — General: Common page. PeopleSoft Inventory does not create accounting entries for non-owned item transactions. To identify the owner of the stock, you must also indicate the stock type on the Define Item — General: Classifications Page. You can overwrite your selection at the time of putaway using the Manual Staging page or the Express Putaway page.</p>
<p>Consignment</p>	<p>This option is available if the item is non-owned. The selection you make defaults to the business unit level and you cannot override it on the Define Business Unit Item - General: Common page.</p>
<p>Standard UOM</p>	<p>Select the most common UOM for the item. UOMs that you establish on the Units of Measure page under the Common Definitions menu are available for selection.</p> <p>The measurement that you select must be valid for stocking, shipping, and ordering. PeopleSoft Inventory maintains the quantity on hand for an item and its costs in the standard UOM. Because of the quantity-on-hand computation and the costing calculations, you cannot change this selection for an item after it is transacted in PeopleSoft Inventory, PeopleSoft Purchasing, or both. These transactions include set up of an item vendor relationship on the Purchasing Attributes - Item Vendor Page.</p> <p>Warning! To minimize rounding discrepancies when using multiple UOMs, we recommend that your standard UOM be the smallest valid UOM for the item. We also recommend that the standard UOM is a whole number.</p>
<p>Category</p>	<p>You must select a value if you have PeopleSoft Purchasing installed to categorize the item appropriately for the Purchasing catalogs.</p>
<p>Item Group and Family</p>	<p>Categorizations for reporting or alternate search keys.</p>
<p>Demand Priority</p>	<p>If you are using PeopleSoft Enterprise Planning or Production Planning, this option enables you to group like items to establish a common priority for all item items within a single group. The demand priorities can then be established for both planning applications. You define demand priority families using the Demand Priority Family page.</p>
<p>Cost Profile Group</p>	<p>Assigning an item to a cost profile group determines the books used by</p>

the item when accounting for that item. When you add this item to a business unit, the Define Business Unit Item - General: Costing page will use this field to determine the item's cost profile within each book used by the business unit.

Be aware of the following conditions:

- If the item is not serial controlled, the cost profile group that you assign to the item cannot be associated with any profiles that have serial ID as the deplete cost method or the cost flow.
- If the item is not lot controlled, the cost profile group that you assign to the item cannot be associated with any profiles that have lot ID as the deplete cost method or the cost flow.

Promise Option

(Optional) Select a value:

Invoke Order Promising: Select this option to enable customer service representatives using PeopleSoft Order Management to promise a shipping date for the item to a customer at the time of order entry using the Order Entry Form component.

Perform ATP Reservations (perform available-to-promise reservations): Select this option to enable customer service representatives using Peoplesoft Order Management to promise the item at the time of order or to enable the Material Reservations process (INPLDMND) in PeopleSoft Inventory to promise demand for the item based on anticipated supply.

Important! To ensure accurate validation, you must complete item definition at the setID and business unit levels and specify non-soft-reservations processing for the item *before* you select the *Perform ATP Reservations* value. For step-by-step procedures for setting up ATP-reserved items, see Understanding ATP-Reservations.

Create Product

Select if your enterprise uses product IDs.

Use Item ID

Select to use the same item ID in PeopleSoft Order Management that you use in PeopleSoft Inventory.

Product ID

If you do not select the Use Item ID option, you can enter a value in this field or, if you have set up automatic numbering for your products, you can enter a value of *NEXT*.

These options are available only if PeopleSoft Order Management is installed and you are in Add mode or you are updating an item that has a status of *Under Initialization*.

Item Image	Click to access the Item Image page, where you can add, remove, or view a picture of the item.
Manufacturers	Click to access the Manufacturer's Item page where you can define information about the item's manufacturer.
Purchasing Item Attributes	Click to access the Purchasing Attributes component, where you can specify purchasing information for your items. You can only access the Purchasing Attributes component after the item has been initially saved.
Units of Measure	Click to access the Units of Measure component, where you can assign a UOM to an item. You can only access the Unit of Measure component after the item has been initially saved.

DEFINING ADDITIONAL ITEM ATTRIBUTES

Access the Define Item - General: Classifications page.

Template ID	Select a value to use default values from an item template that you defined on the Item Templates page. Selecting a template causes all of the template's values to use this item's default values, but you can override any attributes.
Grade	The value in this field is the default on the Lot Control Information page when you create new lots. This field is informational only.
Item Type	Select a value to define the functional group for this item. You can use this information as a search key for reports and inquiries. Establish Item types on the Item Types page under the Define Controls menu.
Potency Code and UPC Code	Informational only.
Stock Type	If the item is non-owned, select a value to identify the type of stock and the stock owner. The stock type defaults from the Defining Purchasing Item Categories to the business unit level and can be modified on the Define Business Unit Item — Inventory: Shipping/Handling page.
Commodity Code	Select a value to use on bills of lading to group and identify products being shipped for freight rating and insurance purposes. Establish commodity codes, also known as <i>freight classes</i> , on the Commodity Code page under the Common Definitions menu.
EU Commodity Code	PeopleSoft Inventory uses this code for Intrastat Reporting purposes.

Navigation: *Items, Define Items and Attributes, Define Item*

General | **Inventory** | Substitutes | Configuration | Custom | Audit

Common [Classifications](#) [Dimensions](#) [Usage](#)

SellID: STATE Item ID: 45006-100700

Description: BATTERY,RECHARGEABLE,AA

Item Status

Current Status Date: 07/16/2004 *Current Status: Active

Future Status Date: Future Status: Copy Item Status

Item Type

Inventory Item
 Non-Owned Item
 Consigned

*Standard UOM: CS Case

Category: 45006 Batteries, Dry Cell (Except Co)

Item Group: 450 HARDWARE A

Family:

Demand Priority:

Cost Profile Group: AVERAGE Average Cost

Promise Option:

[Item Image](#) [Manufacturers](#) [Purchasing Item Attributes](#) [Units Of Measure](#)

Save Return to Search Next in List Previous in List Notify Add Open/Display Include History Connect History

General | Inventory | Substitutes | Configuration | Custom | Audit

General | **Inventory** | Substitutes | Configuration | Custom | Audit

Common [Classifications](#) [Dimensions](#) [Usage](#)

SellID: STATE Item ID: 45006-100700 Standard Unit of Measure: CS

BATTERY,RECHARGEABLE,AA

Item Details Find | View All First 1 of 1 Last

Effective Date: 07/16/2004

Template ID:

Item Type:

LIPC Code:

Commodity Code:

EI Commodity Code:

Hazard Code:

Intl Hazard ID:

Grade:

Potency Code:

Stock Type:

Save Return to Search Next in List Previous in List Notify Add Open/Display Include History Connect History

General | Inventory | Substitutes | Configuration | Custom | Audit

DEFINING ITEMS AT THE SETID LEVEL

Use the Define Business Unit Item component to specify item attributes at the business unit level. Inventory items are defined at the setID level and can be shared among all of your business units. However, some item information (such as rules for replenishment, planning, and physical accounting) will vary depending on which business unit the item is in. These are the types of item attributes that you will want to define at the business unit level.

Navigation: *Items, Define Items and Attributes, Business Unit Item*

The screenshot shows the 'General' tab of the 'Define Business Unit Item' form. The 'Inventory' sub-tab is selected. The form displays the following information:

- Common:** Costing, Usage, Export Information
- Unit:** 00189 **Item ID:** 45006-100700 **Standard Unit of Measure:** CS
- Item Name:** BATTERY,RECHARGEABLE,AA
- Item Status:**
 - Current Status Date: 07/16/2004 **Current Status:** Active
 - Future Status Date: **Future Status:**
- Cost Element:** BUY **Material:** **Inventory Item**
- Standard Cost Group:** **Current Purchase Cost:** 0.0000 **Avg Mkt Cost:** 0.0000
- Default Actual Cost:** **Average Purchase Price:** 0.0000 **Last Price Paid:** 0.0000
- Non-Owned:**
 - Non-Owned Item** **Vendor ID:**
 - Consigned** **Vendor Location:**

Buttons at the bottom include Save, Return to Search, Notify, Add, and Cancel.

DEFINE ITEMS AT THE BUSINESS UNIT LEVEL

Click on the [Costing](#) link on the **General** tab

The screenshot shows the 'Costing' sub-tab selected within the 'General' tab. The form displays the following information:

- Common:** Costing, Usage
- Unit:** 00189 **Item ID:** 45006-100700 **Standard Unit of Measure:** CS
- Item Name:** BATTERY,RECHARGEABLE,AA
- Cost Profile Group:** AVERAGE **Average Cost** **Used in Mfg**
- Costing Details:**
 - Book:**
 - Book Name:** FIN Financial
 - Status:** Active **Ledger Group:** ACTUALS **Ledger:**
 - Profile:**
 - Profile:** AVERAGE **Receipt Cost Method:** Actual Cost
 - Cost Flow:** First In First Out
 - Deplete Cost Method:** Perpetual Weighted Average

Click on the **Inventory** tab.

[General](#) | **[Inventory](#)** | [Substitutes](#) | [Manufacturing](#) | [Planning](#) | [Configuration](#) | [Custom](#)

[Shipping/Handling](#) | Replenishment: [Weight/Volume](#) | [Physical Accounting](#)

Unit: 60169 Item ID: 45006-100700 Standard Unit of Measure: CG
 BATTERY,RECHARGEABLE,AA

Replenishment Options
 Not Included in Replenishment
 Include WIP Quantity

Replenish Class: STD Standard Replenishment
 Replenish Calc Period (Days): 365 Replenish Lead (Days):
 Reorder Point: 20.0000 Reorder Quantity: 30.0000
 Maximum Quantity: Safety Stock:
 Last Annual Demand: Economic Order Quantity:
 Desired Stock-in Probability: 95.0 %

Save Return to Search Notify Add Print/Preview

[General](#) | [Inventory](#) | [Substitutes](#) | [Manufacturing](#) | [Planning](#) | [Configuration](#) | [Custom](#)

DEFINE PURCHASING ATTRIBUTES

Navigation: *Items, Define Items and Attributes, Purchasing Attributes*

Purchasing Attributes		Purchasing Controls	Purchasing Controls2	Purchasing Controls3	Item Vendor
SetID:	STATE	Item ID:	45006-100700	Standard Unit of Measure:	CS
Description:	BATTERY,RECHARGEABLE,AA				
PO Available Date:	07/16/2004	Unavailable:		Category:	45006
*Item Descr:	BATTERY,RECHARGEABLE,AA	BATTERY,RE			
Model:		Lead Time:			
Standard Price:		Std UOM:	CS	*Currency:	USD Dollar
Asset Profile ID:		VAT Use Type:			
Primary Buyer:					
*Account	Product	Last PO Price:			
621350					
*Description:	BATTERY,RECHARGEABLE,AA				Associated Picture
					File Name:

Click on the **Purchasing Controls** tab

Purchasing Attributes	Purchasing Controls	Purchasing Controls2	Purchasing Controls3	Item Vendor	
SetID:	STATE	Item ID:	45006-100700	Standard Unit of Measure:	CS
Description:	BATTERY,RECHARGEABLE,AA				
Matching Controls					
Unit Price Tolerance:	Tolerance Over	Tolerance Under			
% Unit Price Tolerance:	% Ext Price Tolerance:	% Ext Price Tolerance:			
Ext Price Tolerance:	% Ext Price Tolerance:	% Ext Price Tolerance:			
Receiving Controls					
<input checked="" type="checkbox"/> Receiving Required	<input type="checkbox"/> Inspection Required	Inspect Sample Percent:	0.00		
<input checked="" type="checkbox"/> Reject Qty Over Tolerance	City Rctd Tolerance %:	*Inspection UOM:	Standard		
*Partial Qty:	Early Ship Rctd Days:	Inspect ID:			

REQUESTING A NEW ITEM ID

This section will describe the State of North Dakota's process to request a new Item ID.

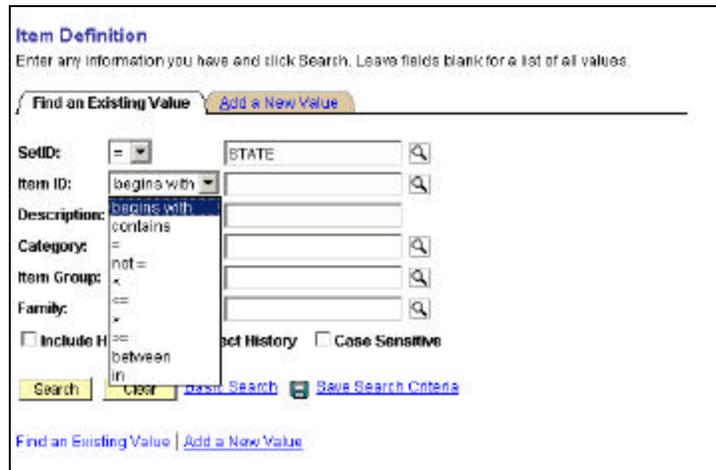
STEPS REQUIRED TO REQUEST A NEW ITEM

An Item Request form (attached) has been created to be used when Inventory Business Units need to create a new item. The steps required to have a new item added are as follows:

1. Inventory Business Unit identifies a need for a new item
2. Inventory Business Unit searches for the item in Peoplesoft to verify that the item does not currently exist in the system
3. Inventory Business Unit forwards request to the Inventory Module Administrator
4. Inventory Module Administrator searches the Item Master to verify that the item does not exist
5. Request is communicated to Periscope/NIGP
6. Periscope/NIGP informs the Inventory Module Administrator when the new item has been added
7. Item is added to Peoplesoft either manually or through an electronic update from NIGP.

The delivered PeopleSoft Item Inquiry pages typically contain search fields for SetID, Item ID, Description, Category, Item Group and Family. Some lookups may only have a subset of these fields. Most search fields also allow users to change the search Criteria for each field. For example, the Item ID field can be set to search by criteria including 'equal to', 'begins with' or 'contains'. Use of these parameters can improve your search results.

Navigation: *Items, Define Items and Attributes, Item Definition*



A Wildcard variable can also be used for item searches. The % (percentage symbol) is used for partial searches based on the text that is entered and where the % is positioned in the text string. Multiple Wildcards can also be used in a search. Here are several scenarios of Wildcard searches using the Item Description field.

1. Search that begins with a Wildcard and ends with text.
2. Search that begins with text and ends with a Wildcard.
3. Search that begins with text, is followed by a Wildcard, then more text and ends with another Wildcard.
4. Search that begins with a Wildcard, is followed by text and ends with another Wildcard.

Illustration of Scenario #1 – Look for batteries by using a partial description of battery and a Wildcard in the Description field.

Item Definition
 Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value [Add a New Value](#)

SetID: [=] STATE [🔍]
 Item ID: [begins with] [🔍]
 Description: [begins with] batt% [🔍]
 Category: [begins with] [🔍]
 Item Group: [begins with] [🔍]
 Family: [begins with] [🔍]

Include History Correct History Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

Search Results
 View All First 1-19 of 31 Last

SetID	Item ID	Description	Category	Item Group	Family
STATE	72513-723155	BATTERY PAPER OF MODEL SHI 50	72513	725	(blank)
STATE	72513-724807	BATTERY PAPER MOTOROLA MNOTE	72513	725	(blank)
STATE	72513-724823	BATTERY PAPER MOTOROLA MODEL H	72513	725	(blank)
STATE	72513-755009	BATTERY PORTABLE RADIO MOTOROLA	72513	725	(blank)
STATE	72513-755157	BATTERY PORTABLE RADIO MOTOROLA	72513	725	(blank)
STATE	72513-257609	BATTERY PORTABLE RADIO VERTEX	72513	725	(blank)

By entering **batt%** in the Description field we were able to find 31 Item ID's that had description beginning with **batt**.

Illustration of Scenario #3 – Look for batteries, or more specifically, vehicle batteries by using text , %, text, %. By entering **batt%veh%** in the Description field the search results will return all items that have a description which contains the first three digits of the words **battery** and **vehicle**.

SetID: [=] STATE [🔍]
 Item ID: [begins with] [🔍]
 Description: [begins with] batt%veh% [🔍]
 Category: [begins with] [🔍]
 Item Group: [begins with] [🔍]
 Family: [begins with] [🔍]

Include History Correct History Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

Search Results
 View All First 1-19 of 19 Last

SetID	Item ID	Description	Category	Item Group	Family
STATE	06012-113020	BATTERY,VEHICLE,GROUP 24,TYPE	06012	060	(blank)
STATE	06012-113053	BATTERY,VEHICLE,GROUP 24,TYPE	06012	060	(blank)
STATE	06012-113087	BATTERY,VEHICLE,GROUP 24,TYPE	06012	060	(blank)
STATE	06012-113590	BATTERY,VEHICLE,GROUP 27,TYPE	06012	060	(blank)
STATE	06012-114416	BATTERY,VEHICLE,GROUP 31,TYPE	06012	060	(blank)
STATE	06012-114424	BATTERY,VEHICLE,GROUP 31,TYPE	06012	060	(blank)
STATE	06012-114762	BATTERY,VEHICLE,GROUP 34,TYPE	06012	060	(blank)
STATE	06012-114788	BATTERY,VEHICLE,GROUP 34,TYPE	06012	060	(blank)
STATE	06012-114770	BATTERY,VEHICLE,GROUP 34/78,UB	06012	060	(blank)
STATE	06012-110729	BATTERY,VEHICLE,GROUP 4D,TYPE	06012	060	(blank)
STATE	06012-116502	BATTERY,VEHICLE,GROUP 65,TYPE	06012	060	(blank)
STATE	06012-116510	BATTERY,VEHICLE,GROUP 65,TYPE	06012	060	(blank)
STATE	06012-116890	BATTERY,VEHICLE,GROUP 74,TYPE	06012	060	(blank)
STATE	06012-116940	BATTERY,VEHICLE,GROUP 75,TYPE	06012	060	(blank)

This time 19 items were found the matched the search criteria.

1. Search by Item ID – Searching by the full Item ID can be used to search for existing items. It is also possible to search for full Item Id's by clicking on the Item ID lookup. However, this method is limited because the search page will return a maximum of 300 records. If no other search criteria is used, searching with a blank Item ID will only return the 300 lowest numbered Item ID's.

Navigation: Items > Review Item Information > Items

SetID: Enter STATE for the SetID

Item ID: Enter the 11 Digit Item ID

2. Search by Partial Item ID

Look Up Item ID

SetID: STATE

Item ID: begins with 06012

Description: begins with

Look Up Clear Cancel Basic Lookup

Search Results

View All First 1-10 of 19 Last

Item ID	Description
06012-110729	BATTERY,VEHICLE,GROUP 4D,TYPE
06012-111776	BATTERY,VEHICLE,GROUP 8D,TYPE
06012-113020	BATTERY,VEHICLE,GROUP 24,TYPE
06012-113053	BATTERY,VEHICLE,GROUP 24,TYPE
06012-113087	BATTERY,VEHICLE,GROUP 24,TYPE
06012-113590	BATTERY,VEHICLE,GROUP 27,TYPE
06012-114416	BATTERY,VEHICLE,GROUP 31,TYPE
06012-114424	BATTERY,VEHICLE,GROUP 31,TYPE
06012-114762	BATTERY,VEHICLE,GROUP 34,TYPE
06012-114770	BATTERY,VEHICLE,GROUP 34/78 UB
06012-114788	BATTERY,VEHICLE,GROUP 34,TYPE
06012-116502	BATTERY,VEHICLE,GROUP 65,TYPE
06012-116510	BATTERY,VEHICLE,GROUP 65,TYPE
06012-116890	BATTERY,VEHICLE,GROUP 74,TYPE
06012-116940	BATTERY,VEHICLE,GROUP 75,TYPE
06012-116957	BATTERY,VEHICLE,GROUP 75,TYPE
06012-117211	BATTERY,VEHICLE,GROUP 76,TYPE

3. Search by Item Group

Item Definition

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

SetID: STATE

Item ID: begins with

Description: begins with

Category: begins with

Item Group: begins with 060

Family: begins with

Include History Correct History Case Sensitive

Search Clear Basic Search Save Search Criteria

Search Results

Only the first 300 results can be displayed. Enter more information above and search again to reduce the number of results. View All First 1-100 of 300 Last

SetID	Item ID	Description	Category	Item Group	Family
STATE	06003-110555	ANTI-FREEZE/WINDSHIELD WASHER	06003	060	06003
STATE	06012-110729	BATTERY,VEHICLE,GROUP 4D,TYPE	06012	060	06012
STATE	06012-111776	BATTERY,VEHICLE,GROUP 8D,TYPE	06012	060	06012
STATE	06012-113020	BATTERY,VEHICLE,GROUP 24,TYPE	06012	060	06012
STATE	06012-113053	BATTERY,VEHICLE,GROUP 24,TYPE	06012	060	06012
STATE	06012-113087	BATTERY,VEHICLE,GROUP 24,TYPE	06012	060	06012
STATE	06012-113590	BATTERY,VEHICLE,GROUP 27,TYPE	06012	060	06012

Note: The search on Item Group 060 – Automotive and Trailer Maintenance returned more than 300 records. As a result not all records will be displayed. Additional criteria will be needed in order to be to reduce the number of records in the search results.

ITEM COPY

To maximize consistency and efficiency in your item definition process, PeopleSoft Inventory enables you to copy item definitions from the setID level to the business unit level and between business units using the Item Copy page. You can also copy the item status from the setID to any of the business units where you defined the item or you can copy the substitution definition to the business unit level.

COPY ATTRIBUTES ACROSS UNIT

Navigation: *Items > Define Items and Attributes > Copy Items*

Item Copy

Select Copy Option

Copy Item Within SetID
 Copy Business Unit Attributes
 Copy Substitutes
 Copy Attributes Within Unit
 *Business Unit Selection: Inventory

Copy Attributes Across Unit

SetID: STATE Target Eff Date:

Source Unit: 80169

Source Item ID: 45006-100700 Target Item ID:

Description: BATTERY,RECHARGEABLE,AA

Inventory	Find View All	First	6-7 of 14	Last
<input type="checkbox"/>	53002	JRCC		
<input checked="" type="checkbox"/>	80161	Bismarck District		

Save
Notify

ITEM REPLENISHMENT

BUSINESS UNIT SETUP

SETUP REPLENISHMENT PAGE

Navigation: *Inventory > Replenish Inventory > Setup Replenishment*

The screenshot shows the 'Setup Replenishment' form for Unit 80189. The form is organized into several sections:

- Unit:** 80189
- Replenishment Options:**
 - Reorder Point Replenishment
 - Fixed Bin Replenishment
- Reorder Point Order Quantities:**
 - EOQ
 - Min/Max
 - Static Reorder Qty
 - Include Requisition Quantities
 - Include WIP Quantity
- Reorder Point Range Checking:**
 - Reorder Point Range Checking
 - Range Checking Percentage: %
- EOQ Parameters:**
 - Avg Order Prep Cost (Base Cur):
 - Carry Rate: %
- General Parameters:**
 - Desired Stock-In Probability: %
 - Replenish Calc Period (Days):
- Replenishment Request Cancel Method:**
 - Delete
 - Cancel

At the bottom of the form, there are buttons for 'Save', 'Return to Search', 'Notify', 'Add', and 'Add to Global Supply'.

Enter Business Unit Replenishment Options:

- Select Reorder Point Replenishment
- Select Static Reorder Qty
- Desired Stock-In Probability (Default value is 95%. Do Not Change)
- Replenish Calc Period Days (Default value is 365. Do No Change)
- Replenishment Request Cancel Method (Default value is Delete)

SETUP ITEM REPLENISHMENT

Navigation: *Inventory > Replenish Inventory > Setup Item Replenishment*

ITEM REPLENISHMENT ATTRIBUTES PAGE

Item Replenish Attributes
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Business Unit: =

Item ID: begins with

Description: begins with

Item Group: begins with

Family: begins with

Case Sensitive

[Basic Search](#)

SETUP ITEM REPLENISHMENT PAGE

Setup Item Replenishment

Unit: 80169 **Item ID:** 45006-100700 **Standard Unit of Measure:** CS
 BATTERY,RECHARGEABLE,AA

Replenishment Options

Not Included In Replenishment

Include WIP Quantity

Replenish Class: Standard Replenishment

Replenish Calc Period (Days): **Replenish Lead (Days):**

Reorder Point: **Reorder Quantity:**

Maximum Quantity:

Last Annual Demand:

Desired Stock-In Probability: % **Economic Order Quantity:**

- Uncheck the Not Included In Replenishment checkbox if it is checked
- Select STD as the Replenishment Class
- Replenish Calc Period (Days). Do not change the default value of 365.
- Enter Reorder Point
- Enter Reorder Quantity
- Desired Stock-In Probability. Do not change the default value of 95%.