

Item Master Business Process



Agency (Item Master addition request):

1. Identifies the need to add new Items or update descriptions on existing items.
2. Downloads the Request for New Item IDs form on SFS*Secure*:
<https://www.sfs.ny.gov/files/infocenters/RequestForNewItemIDs.xlsx>
3. Emails request to ItemMaster@ogs.ny.gov.

Item Master Team at Procurement Services:

1. Item Master Team reviews agency submission and works with agency requester to clarify or improve item descriptions.
2. Team validates that the Unit of Measure (UOM)s on the submitted form exist in the database to avoid upload failures.
3. Team reviews UNSPSC Category Codes on the submitted sheet and makes changes as necessary.
4. Item Master Team then completes an excel to CI template or enters items manually.
 - a. If using Excel to CI template:
 - i. Completes all required fields on the template.
 - ii. Assigns the category codes.
 - iii. Max number allowed is 2000 items per file; if more split and add multiple CIs
 - iv. Team then submits the ticket and attached file to SFS helpdesk and identifies whether the request is to update existing items or add new items.
 - b. If entering manually (fewer than 25 items):
 - i. Completes all required fields in Define Item > Add New Value.
 - ii. Notify requester once completed.
5. Team review and submission to SFS Helpdesk (or manual creation) will occur within 5 business days. If work is needed with agency requestor, completion may take more time.
 - a. All helpdesk incidents should be submitted by the Item Master shared mailbox: ItemMaster@ogs.ny.gov.

SFS:

1. SFS helpdesk submits file and request to POST team within one day of receiving the ticket.
2. POST uploads items into the Production environment, and updates incident. Load will be completed within 5 days of receiving ticket from helpdesk.
 - a. If there are errors in the load:
 - i. POST updates the incident by attaching the file in error.
 - ii. POST sends data in error to Item Master Team to be corrected.
 - iii. POST re-loads items once error(s) is corrected.
 - b. If load is successful:
 - i. POST notifies MDM via RCC
3. MDM will deploy to the test environment for POST to test and confirm.
 - a. POST will request migration to production.
 - b. MDM will move to production upon receipt of approval.
 - c. POST will confirm in production and update the incident and send comments to Item Master Team and resolve the incident.

Item Master Team at Procurement Services:

1. Item Master Team reviews the incident update.
2. If the update is for upload errors.
 - a. Item Master Team reviews the errors and either sends corrected data (rows that need action) or the entire file.
3. If the update indicates successful completion:
 - a. Item Master Team verifies in production and updates agency.