

# Process to Request New Item IDs or Updates to Item Descriptions in the Statewide Financial System (SFS) Item Master

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## Purpose:

The Item Master Team within Procurement Services at the Office of General Services (OGS) is responsible for the creation and maintenance of the Item Master within the Statewide Financial System (SFS). The Item Master Team and SFS have developed a process to request new Item IDs to be established in the Item Master within SFS. All requests submitted will be analyzed and approved by the Item Master Team in order to be established into SFS.

## Procedure:

The request is initiated when agency representatives complete the Request for New Item IDs form and email that request to: [OGS.sm.PS.Catalog.ItemMaster@ogs.ny.gov](mailto:OGS.sm.PS.Catalog.ItemMaster@ogs.ny.gov). The Request for New Item IDs form is available on SFS*Secure* and can be downloaded from the following link: <https://www.sfs.ny.gov/files/infocenters/RequestForNewItemIDs.xlsx>. Agency representatives should follow the directions below to populate the required fields on the formatted spreadsheet. There are 11 required fields on the Request for New Item IDs form that must be populated to ensure accuracy. There are four optional fields that agency representatives may choose to use. Agency representatives should contact: [OGS.sm.PS.Catalog.ItemMaster@ogs.ny.gov](mailto:OGS.sm.PS.Catalog.ItemMaster@ogs.ny.gov) with any questions.

## Special Instructions:

When saving your document use the naming convention as follows:

NEW\_ITEMS\_BUID\_mm\_dd\_yyyy.xlsx

## Data Fields:

The form is an Excel Workbook with two tabs and both must be completed.

### Request Form Header Tab

1. Request Date: Current Date
2. Requester name: Person initiating the request
3. Requester email: Contact information for any questions regarding the request
4. Business Unit: Inventory Business Unit, if applicable
5. Inventory Item Y/N: Indicate Y if Inventory Item
6. Comments/Instructions: Use for data, comments, instructions specific to agency processing

### Item Information and Attributes Tab

Add/Modify/Inactivate: Indicate whether a new Item ID is to be added, an existing Item Description is to be modified, or an existing Item ID is to be inactivated.

1. Item ID: Enter Item ID to be updated or inactivated, or enter a suggested Inventory Item ID if Inventory Item is for OEM Stockpiles. Do not enter an Item ID if requested item is for other inventory business unit; an ID will be sequentially assigned.
2. Item Description (60 characters long): Enter Item description up to 60 characters. Description should be typed in sentence case per NYS standardized Item descriptions.
  - a. A list of standard abbreviations is included in the form for your use in drafting item descriptions.
3. Unit of Measure: Enter a Unit of Measure for the new Item. This should be the lowest possible Unit of Measure in which the item is procured (standard unit of measure).
  - a. A list of the available units of measure and their codes is included in the form.
  - b. If a UOM is not provided it will be defaulted to EA.
4. UNSPSC Category Code: Enter an appropriate code to classify the item.
  - a. A list of the codes is available in this document found on the SFS*Secure* site:  
<https://www.sfs.ny.gov/files/infocenters/ProcurementCategoryCodeSelectionTool.xlsx>
5. Lot Controlled (Y/N): Indicate Yes if the item is Lot Controlled.

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6. Serial Controlled (Y/N): Indicate Yes if the item is Serial Controlled.
7. Item Long Description (254 characters): Enter item description up to 254 characters. Description must be typed in all capital letters.
8. Item Description (30 characters long): Enter Item description up to 30 characters long.
9. Item Short Description (10 characters long): Enter Item description up to 10 characters long.

**NOTE:** A completed form does not guarantee that all requested additions and changes will be made. The Item Master Team will analyze the request and will either make the requested changes or seek clarification from the requestor.