

Defining and Maintaining Items

Overview

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Ownership

The Warehouse/Operations Manager is responsible for ensuring that this document is necessary, that it reflects actual practice, and that it supports corporate policy.

Section Objectives

At the end of this section, you should be able to:

- Define items using item templates.
- Verify item definition and maintenance information using reports and inquiry.

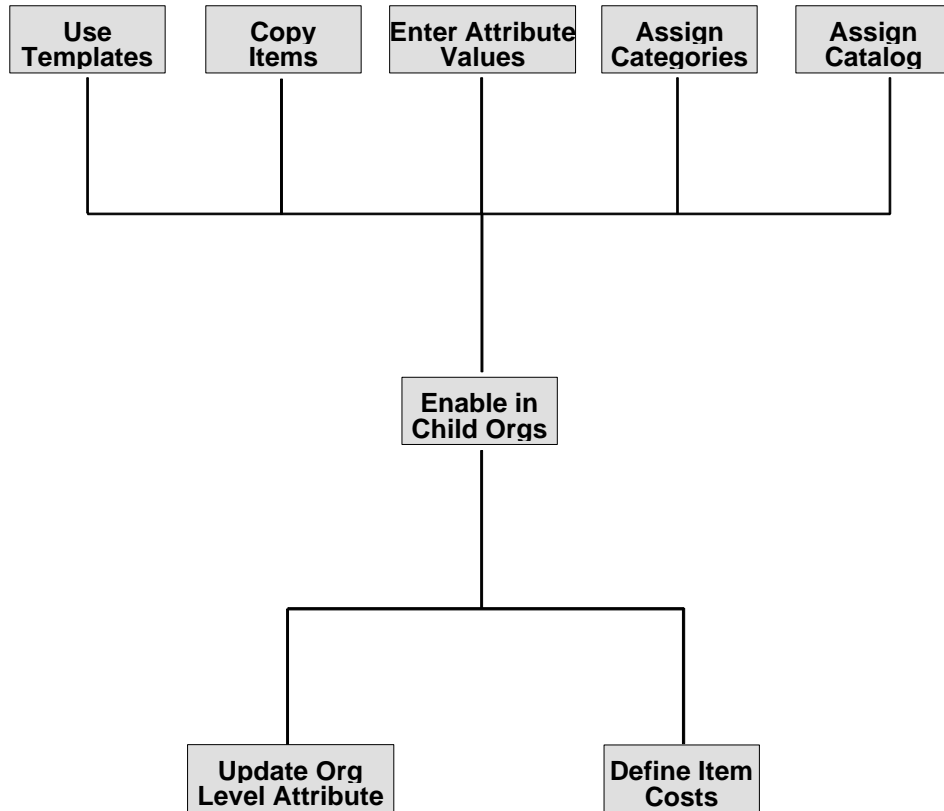
Item Definition: Introduction

The majority of Oracle Inventory Items are defined during the Setup process. Subsequent to the Setup process, items may be defined by using templates, or by copying the attributes from an existing item.

This educational overview covers only those situations that are subsequent to the Setup process — using templates and copying attributes from existing items.

Item Definition: Overview

The following flow chart illustrates the steps you will take to fully define your items.



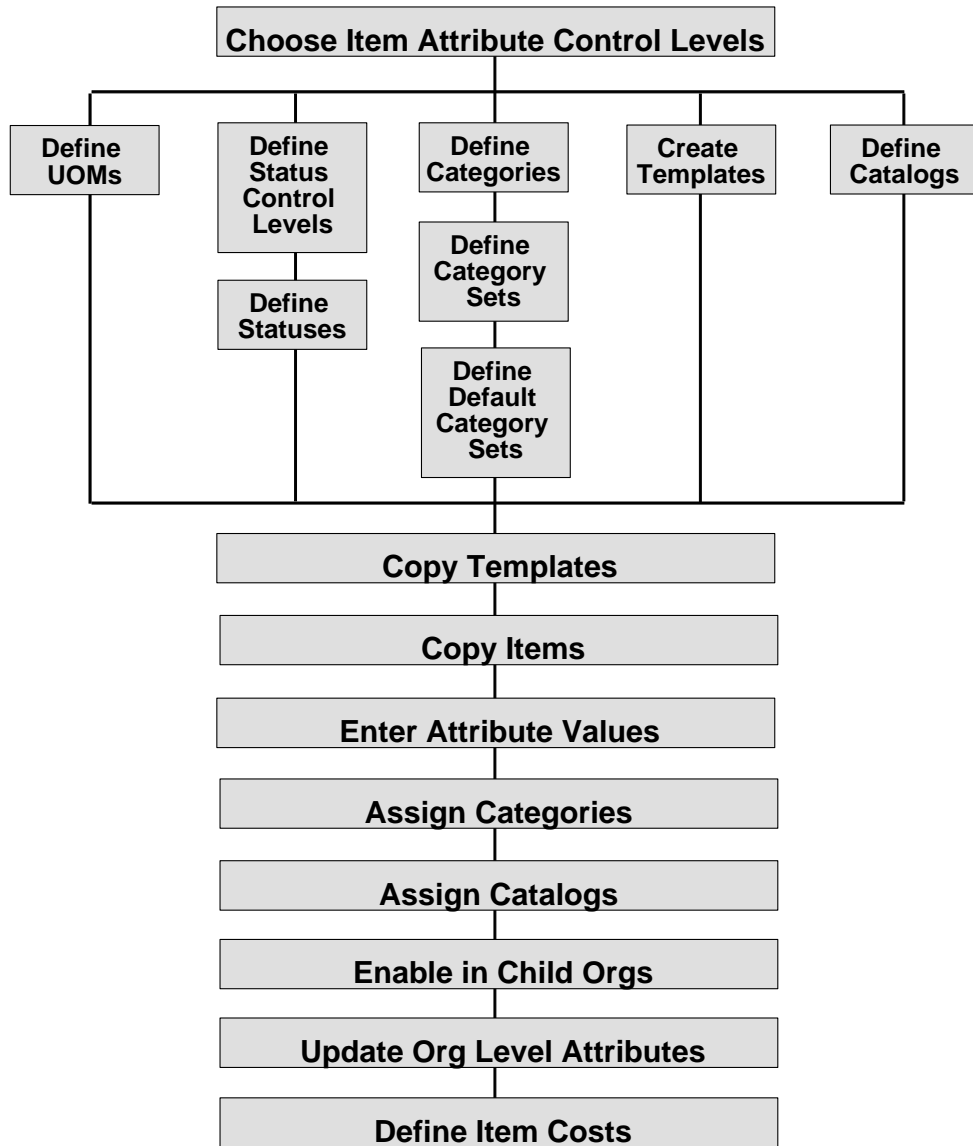
How to Define and Maintain Items

The following steps may be followed to define and maintain items.

1. Create the item templates.
2. Use the templates and existing items to define items.
3. Enter values for additional item attributes.
4. Assign a status to the item.
5. Assign categories to the item.
6. Enable the item in other organizations.
7. Update the organization-level attribute values.
8. Define the item relationships.
9. Search for items.
10. Delete items.

Item Maintenance: Overview

The following graphic summarizes all the steps that you may take in order to define and maintain items.



Creating Item Templates

If you regularly define many items that share the same values for a number of attributes, you may want to define item templates that help you avoid duplicating effort. An item template can contain values for any number of item attributes.

You also have the ability to enable attributes and assign values to those attributes in each template that you create. When you apply a template to an item, Oracle Inventory only updates those attributes that are enabled for the template. It is suggested that you define templates with relatively few attributes enabled because you can apply more than one template to define one item.

In addition to user-define templates, you can also use the 14 predefined templates in Oracle Inventory to define and update items. To review the attributes associated with the predefined templates, see the Predefined Item Templates table in the Appendix.

Using Templates and Existing Items

You can define new items using user-defined or predefined item templates, as well as copying attributes from other items.

Using Item Templates

- You can apply one or many templates to one item. The template values will populate the attribute fields of the new item.
- In general, if an attribute value already exists for an item, the most recent value (from the last template applied) overrides the previous value.

EXCEPTION: The attribute value for the primary unit of measure (UOM) can never be changed or updated by using this function — copying templates.

- These attribute values are defaults; you can change them in the alternative regions of the Master Item window.

Copying Items

- You can copy the attribute values of one item to another.
- These attribute values are defaults; you can change them on the alternative regions of the Master Item window.

Refer to [***Using Templates and Existing Items \[NAV0653\]***](#).

Refer to Lab 1: Copy Template in [***Defining and Maintaining Items \[LABS0148\]***](#).

Refer to Lab 2: Copy Item in [***Defining and Maintaining Items \[LABS0148\]***](#).

Using Reports and Inquiries

Oracle Inventory has several reports and inquiry windows that allow you to view item definition and maintenance information.

Using Reports

You can run the following reports from the Item Report form.

- Item definition detail - Reports attribute values for items.
- Item definition summary - Reports item description, category, catalog, revision, UOM, status, user item type, and unit cost.
- Item categories report - Reports items belonging to specific categories.
- Item templates listing - Reports attribute values for item templates.
- Item statuses report - Reports status name and effective dates for items.
- Item cross-references listing - Reports cross-reference information for items.
- Item relationships listing - Reports substitute and related items.

Refer to [Preparing Item Reports \[NAV6006\]](#).

Refer to Lab 3: Verify Item Information — Reports in [Defining and Maintaining Items \[LABS0148\]](#).

Using Reports and Inquiries

Using Inquiry Windows

You may view item information on-line. The information includes: attributes, categories, or revisions for an item.

Depending on the function security assigned to your responsibility, you can view the information for an item in a single organization only, a single organization and its master organization, or across all organizations. The function security assigned to your responsibility determines whether you have the ability to look across multiple organizations.

The views that are available include:

- View Item Attributes - View values for all attributes in an organization.
- View Item Information - View summary information for each item.
- Deletion Groups - View delete information for items, components, bills of material, operations, and routing.

Refer to [Viewing Item Information \[NAV6007\]](#).

Refer to Lab 4: Verify Item Information — Inquiry in [Defining and Maintaining Items \[LABS0148A\]](#).

Defining and Maintaining Items: Summary

You should now be able to:

- Define items using item templates.
- Verify item definition and maintenance information using reports and inquiry.