

Processing and Maintaining ISGroup Items



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Using the UpdateUNI.exe Program to Process ISGroup Items

The ISGroup items, also known as ISG-UNITED item records, are provided in the United Stationers' Price Plan IT. To import the ISG-UNITED item records, use the O/PUS UpdateUNI program according to the normal procedures with the following specifics:

- The United Price Plan IT is only available by downloading from the O/PUS PSN. At this time, the plan is not being offered through the United ICAPS file delivery system.
- The United Price Plan IT is loaded as a United Stationers Catalog.
- The ISG-UNITED items are created and/or updated in the Direct Buy record.
- The Direct Buy record VendorID (name) is ISG-UNITED.
- The ISG Dealer Cost and the required Buy Quantity associated are inserted into the Direct Buy record.
- The Direct Buy Stocking Indicator is set to S on ISG-UNITED items.
- If a Suggested Replacement is offered for brand products LOP, VPO, FSL, or AFL, the original item is linked to the Suggested Replacement and the original item is set to the Alternate Type of Reference if No On-Hand from your Inventory parameters.
- The Contract selection within the UpdateUNI program creates a VENDOR CONTRACT for the ISG-UNITED items with next level ISG Dealer Cost and Minimum Quantity required.

Downloading the Latest UpdateUNI Program

Begin by downloading the latest UpdateUNI program using PSNControl. You *must* download the latest UpdateUNI software which includes the latest programming enhancements before loading the IT file. Do NOT proceed until you have loaded the latest UpdateUNI program.

- 1 To download the latest version of UpdateUNI using PSNControl click Start, Programs, PSNControl, PSNControl. *Be sure to download the UpdateUNI program version 91105a or greater.*
- 2 Add UPDATEUNI to the File Transfer List.
- 3 Click Transfer Now. PSNControl places the UpdateUNI.exe file in your Program files\OPUS\Simple folder and creates an icon on your desktop.

Launching the UpdateUNI Program

- 1 Double-click the UpdateUNI icon on your Desktop. The Update DDMS Inventory with United Stationers window opens, as shown in Figure 1.
- 2 To open the wizard, click Start.
- 3 Click Next until the Catalogs page opens, as shown in Figure 2.
- 4 In the Catalogs column, enter the file name **IT**.
- 5 Click the corresponding Select check box to load the IT catalog now.
- 6 Leave the Force United box blank since this does not apply to the IT price file.
- 7 Click the Add Items check box to create new items in your Item database. New Dept and New Class are required when you select Add Items.
- 8 In the New Dept column, enter the department ID where new items are added from this catalog.
- 9 In the New Class column, enter the stock class ID where new items are added from this catalog.

To install the latest ISGroup enhancements, be sure to run the UpdateUNI program version 91105a or greater.



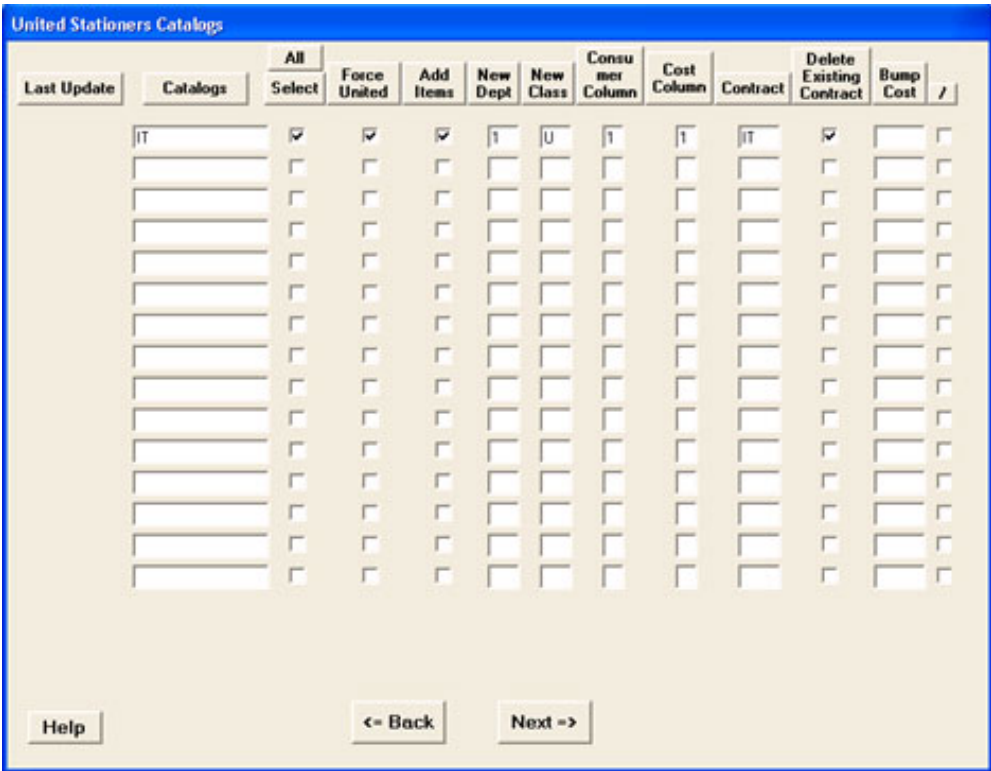
Figure 1: The Update DDMS Inventory Window

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- 10 Leave the Consumer Column and Cost Column blank. These columns do not apply to the IT price plan.
- 11 In the Contract column, enter the DDMS Vendor Contract ID to add the items from the price plan to a vendor contract that contains the programs quantity breaks and required buy units.
- 12 Click the Delete Existing Contract check box to delete any existing DDMS contract with the same ID.
- 13 In the Bump Cost box, enter a decimal by which to bump cost (for example, 1.015 = +1½% while 0.98 = -2%). All costs on all items in the selected plan are multiplied by this amount.
- 14 Click the check box in the / column to divide all costs by the Bump Cost decimal amount instead of multiplying.

Note: The bump logic used in this program matches the United Stationers bump method.

Figure 2:
Using the
UpdateUNI
Program



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- 15 Click Next until the final page opens that allows you to execute the update, as shown in Figure 3.
- 16 You can use the Printer box corresponding to the Exception Report heading to create a standard Exception Report of items that were not updated as expected. Click the Printer box and enter the logical name of the printer to use, P1 or P2, for example.

Note: If you specify a file printer and are prompted for a file path and name, specify the drive letter as well as the path and file name, such as C:\temp\uniupdateexp.txt. If you are not prompted for a file name, the Exception Report overwrites the default text file set up in your Printer settings.

- 17 An optional step lets you click the All Item Report check box to save a spreadsheet report indicating what happened to every item. The report is sent to the UNI-REPORT file in your Download folder.

Note: You can print the Exception Report, the All Item Report, or both, but you must choose at least one for troubleshooting purposes.

Figure 3:
Executing the
Update

The screenshot shows the 'UpdateUNI' dialog box with the following elements:

- 1. Reports:** Two buttons, 'Exception Report' and 'All Item Report', are visible. Below them is a 'Printer' field containing 'P1' and a checked checkbox.
- 2. Download Selected Files:** A button is present.
- 3. Delete Contracts:** A button is present. To its right is a 'During Update' checkbox, which is unchecked.
- 4. Start Update:** A button is present. To its right is a 'REPORT ONLY - NO Items Updated' checkbox, which is unchecked.
- Bottom Buttons:** 'Help', '<= Back', and 'Exit' buttons are located at the bottom of the dialog.

- 18 Click Download Selected Files to automatically download all the plans you selected in the previous pages using PSNControl. The loading program U_UNI is also included in the download list. The button indicates selected files are downloaded.

Note: Be sure that all files show Download Complete in the PSNControl file transfer list. If some files are not available, you can wait a day or so to download the files before continuing. Or continue with what you have, and later return to this application to load the missing files once they are downloaded.



- 19 An option step lets you delete contracts. To do so, select one of the following options:
- Click the Delete Contracts button. The program deletes the contracts you specified to delete in previous pages. When the contracts have been deleted, click OK.
 - Check the During Update box so the Update process automatically deletes contracts. The button indicates selected contracts are deleted.
- 20 Another optional step lets you preview how items are updated in the selected report before performing the update. To do so, check the Report Only – No Items Updated box. The system prints the reports you selected, but the items are not actually changed.
- 21 When ready, click Start Update. The Start Update button displays which files are being updated and when the update is complete.
- 22 After the update is complete, click OK and Exit.

Viewing Vendor Contracts

The items which have quantity breaks that are higher than the dealers' selling unit of measure can be added to a vendor contract in the DDMS system by entering a contact name in the UpdateUNI program when processing ISGroup items. You can view the vendor contract in the Item window.

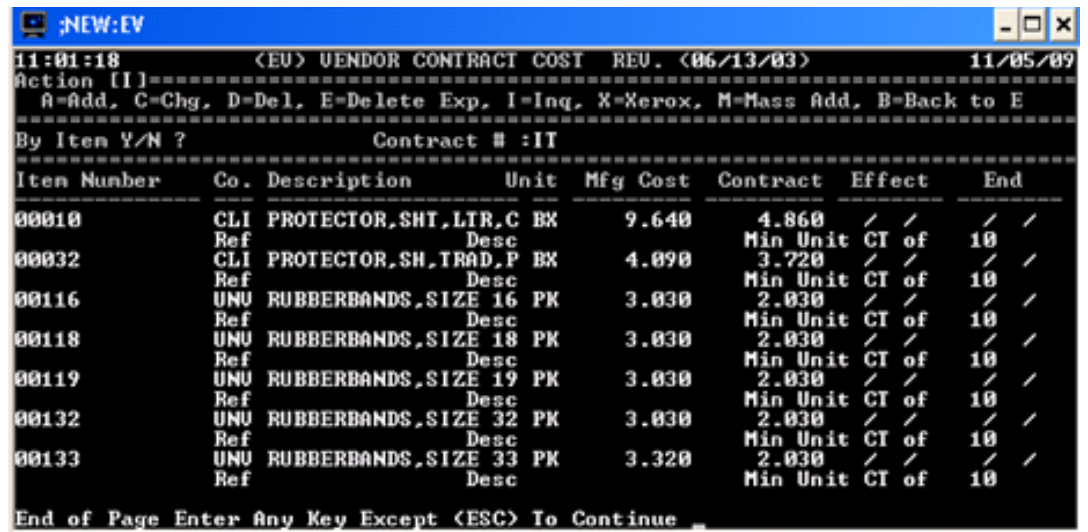
Note: *As with all OPUS updates,* if O/PUS cannot determine the item's selling unit of measure during the list price variance function, the item is not updated nor is it added to the vendor contract. These exceptions are written to the Exception Report or to the All Item Update Report you select when using the UpdateUNI feature.

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- 1 In the DDMS Master Menu, double-click  .
- 2 When the Item window opens, click , type **CTRL + U**, or click the View menu and choose Vendor Contract.
- 3 The (EV) screen opens. To view a vendor contract, select the [I] Inq action code. The cursor moves to the By Item field.
- 4 Press Tab to move to the Contract # field.
- 5 Enter the contract you created when processing ISGroup items.
- 6 The system displays the contract information, as shown in Figure 4. When finished viewing, press Esc.

Note: If items exist in your database that are being sold at the highest Quantity Break Unit of Measure offered by United (CN for example), since a higher quantity break does not exist, the item does not appear on the vendor contract.

Figure 4:
Viewing
Vendor
Contract
Information in
the (EV) Screen






```

NEW:EV
11:01:18      (EU) UENDOR CONTRACT COST REU. <06/13/03>      11/05/09
Action [I]-----
A=Add, C=Chg, D=Del, E=Delete Exp, I=Inq, X=Xerox, M=Mass Add, B=Back to E
-----
By Item Y/N ?      Contract # :II
-----
Item Number  Co.  Description      Unit  Mfg Cost  Contract  Effect  End
-----
00010      CLI  PROTECTOR,SHT,LTR,C BX      9.640    4.860    / / / /
Ref          Desc          Min Unit CT of 10
00032      CLI  PROTECTOR,SH,TRAD,P BX      4.090    3.720    / / / /
Ref          Desc          Min Unit CT of 10
00116      UNU  RUBBERBANDS,SIZE 16 PK      3.030    2.030    / / / /
Ref          Desc          Min Unit CT of 10
00118      UNU  RUBBERBANDS,SIZE 18 PK      3.030    2.030    / / / /
Ref          Desc          Min Unit CT of 10
00119      UNU  RUBBERBANDS,SIZE 19 PK      3.030    2.030    / / / /
Ref          Desc          Min Unit CT of 10
00132      UNU  RUBBERBANDS,SIZE 32 PK      3.030    2.030    / / / /
Ref          Desc          Min Unit CT of 10
00133      UNU  RUBBERBANDS,SIZE 33 PK      3.320    2.030    / / / /
Ref          Desc          Min Unit CT of 10
-----
End of Page Enter Any Key Except <ESC> To Continue
  
```


Adding the ISG-UNITED Vendor

To use and access the appropriate ISG pricing for United, you must first create a vendor. When creating a vendor for ISG-UNITED you can also assign it a vendor contract. Doing so lets you view the quantity break pricing and use the appropriate quantity pricing when creating Purchase Orders.

- 1 To add the ISG-UNITED vendor, double-click  .
- 2 Click  . The boxes in the window are cleared.
- 3 Click the Vendor # box and enter the vendor number as **ISG-UNITED**.
- 4 Click the Name box and enter the vendor's name.
- 5 Click the Remit/To Settings tab. Click the Contract From and Contract To boxes and enter the two digit vendor contract that you created when processing ISGroup items.
- 6 When finished entering information in the Master and Remit/To Settings tabs, you can complete the remaining boxes. Click each tab to add information. For more instructions, see your online documentation.
- 7 Click  to save the vendor.

Note: The Vendor #, Name, and Contract boxes are the only required boxes to add the vendor. However, we recommend you complete all the boxes required by your company when adding new vendors.

Adding the ISG-UNITED Account Number in the (L6F) Screen

Before you can use the ISG-UNITED account number to transmit to United Stationers via PSN, you must enter the vendor account number and order taker number assigned by United in the (L6F) United Communications screen.

- 1 From the DDMS Master Menu, double-click



- 2 In the Keyop Menu, double-click



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- 3 In the Parameter Editor window, double-click Text Base Parameters.
- 4 In (L) Parameters screen, select the [6] Vendor & Wholesale Communications action code.
- 5 In the (L6) screen, select the [F] United selection code.
- 6 The (L6F) United Communications screen opens, and the cursor moves to the United Parameters field. Press Tab to accept the default or enter the number to use.
- 7 When the cursor moves to the Hayes Only field, press Tab to move to the first blank Account #1 through Account #4 field.

Note: If you do not have a blank Account # field available, contact DDMS technical support for assistance.

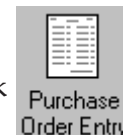
The Account # 5 field can only be used for National Express Delivery accounts. DO NOT enter your new ISG-UNITED account number in the Account # 5 field.

- 8 In the first blank Account # field available, enter the new six digit ISG-UNITED account number.
- 9 In the corresponding field, enter the order taker number assigned by United in the three digit bracket field. This is the same order taker number used for your wholesale account.
- 10 To save your changes, press Enter until the cursor moves through all the remaining fields on the screen. If you press Esc before doing so, your changes are not saved.

Using the Low-Stock Feature to Purchase ISG-UNITED Items

You can use the Low-Stock feature in the Purchase Order Entry window to create purchase orders for items matching the ISG-UNITED records in your Item database. The Low-Stock Report can calculate the suggested order quantity in two ways: It can use the sales history of each item and the projected number of weeks between purchases, or it can use the minimum and maximum stock levels. Specify which calculation to use in the Purchase Order Entry Low-Stock dialog box.

- 1 From the DDMS Master Menu, double-click
- 2 In the Action Code list box, click Low-Stock.



- 3 When the Low-Stock Limits dialog box opens, as shown in Figure 5, in the Vendor Options section, click the Set PO Vendor To list box and select Direct Buy Vendor.
- 4 In Match On box, enter your direct buy vendor, ISG-UNITED, for example.
- 5 Click the Look In list box and select Direct Buy Vendor ID.
- 6 In the Options section, click the Up Quantity check box. The system calculates the suggested quantity to order, based on the low-stock calculations, and automatically increases the purchase order quantity to meet United's minimum specified in the Vendor Contract.
- 7 In the Settings section, click the down arrow in the Program box to select the calculation to determine the recommended order quantities. Enter your response according to the following:
 - Cycle:** Uses the sales history of each item and the projected number of weeks between purchases
 - Min/Max:** Uses the minimum and maximum stock levels set in your inventory database.
- 8 Set any additional limits, as necessary.

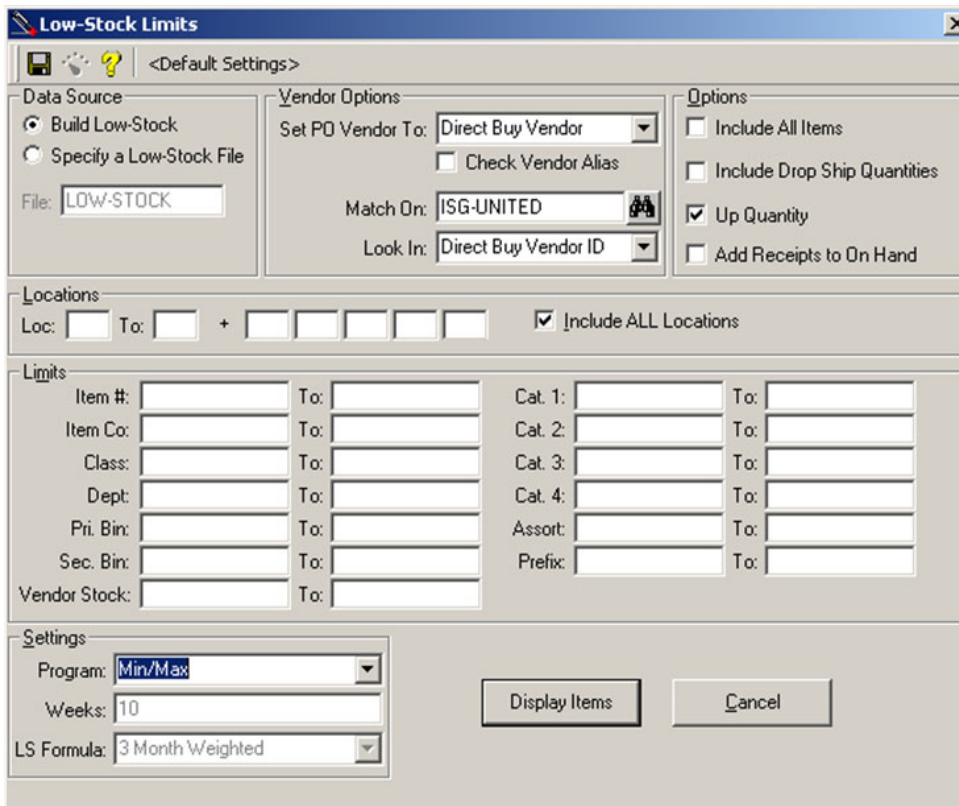



Figure 5: The Low Stock Limits Dialog Box

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- 9 To save these limits as a custom profile you can use again:
 - 9.1 Click .
 - 9.2 In the Save Custom Low Stock Settings dialog box, enter a descriptive profile name, such as ISG-UNITED, and so on.
 - 9.3 Click Save. The profile name appears below the title bar.
- 10 When you finish setting limits, click Display Items.
- 11 The Low-Stock Items dialog box opens. Create the purchase order for ISG-UNITED items as you normally would. For more details, see your online help.

Transmitting the ISG-UNITED P/O

Once you have created the ISG-UNITED P/O, you can manually transmit it using the (SR) Purchase Order Reports screen.

- 1 From the DDMS Master Menu, double-click



- 2 Double-click



- 3 In the (SR) screen, begin completing the fields to transmit the P/O to United until the cursor moves to the P/O Numbers field.
- 4 In the P/O Numbers field, enter your ISG-UNITED Purchase Order number.
- 5 At the Are You Sure prompt, type **Y**.
- 6 The secondary transmission screen opens and the cursor moves to the ACCT# 1 field. Press the Spacebar to move the cursor to the account number specific to ISG-UNITED.
- 7 When the cursor is in the correct field, type **X** to select the account number for this purchase order transmission. See Figure 6.
- 8 Press Enter to move the cursor through the screen and transmit the P/O to United.

Note: Any changes made to these fields affect this transaction only. If you previously used an alternate (L6F) screen for the ISG-UNITED account, instead of adding the new account to your current (L6F) screen, select the screen location number at the bottom of the first screen before continuing to the secondary transmission screen.

Converting the Direct Buy Vendor Name to Manufacturer (First-Time Only)

This program can be run before or after processing the Price Plan (IT) from United.

After you have run the UpdateUNI program and processed ISGroup items, your inventory may still contain many former ISGroup items with the Direct Buy Vendor name of ISG. A file has been produced by ISGroup containing all the items that are now considered either Direct Purchase from the manufacturer, or sourced through SYNEX.

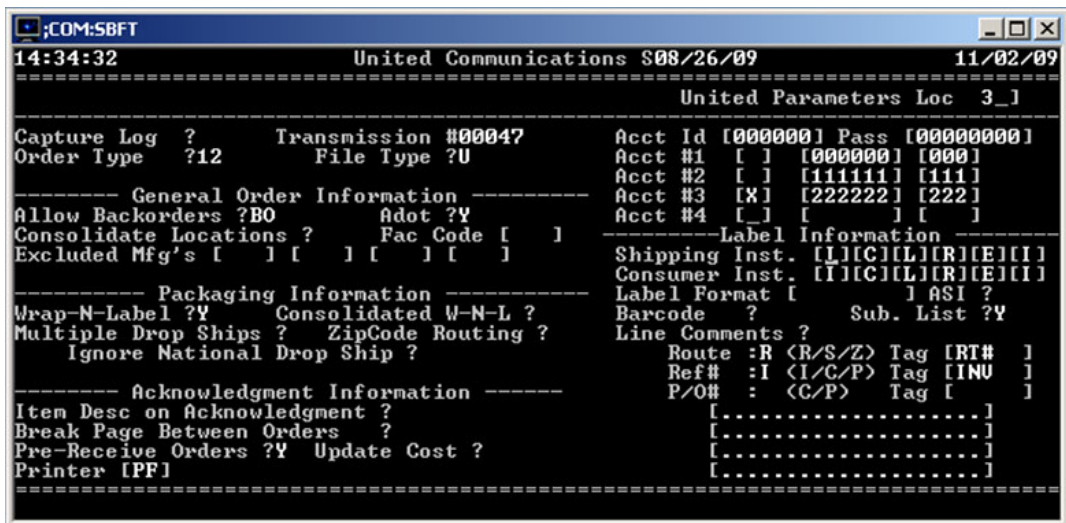
To convert these items, download the ISGITEMS_ program via PSNControl, along with the ISGITEMS file. When the ISGITEMS_ program is executed using the (+IF)[P] screen, the system mass changes any non-RDC items to contain unique manufacturers' identifiers based on the data reference file provided by ISGroup.

Note: The following steps to convert the direct buy vendor name to the manufacturer by executing the ISGITEMS file, *must only be performed once*. Future updates for the ISG-UNITED files do not require you to process the ISGITEMS file to maintain your ISGroup Items.

The ISGITEMS_ program searches for Direct Buy records having the prefix and item number provided in the ISGITEMS file, as well as ISG as the Vendor ID (name). The item is modified in the following manner:

- Changes the VendorID (name) from ISG to either the Direct Purchase Vendor (manufacturer) or to SYNEX.

Figure 6:
Transmitting
the ISG-
UNITED
P/O



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Note: ISG has consolidated manufacturer prefixes such as SWI, DTM, WLJ, and so on to have a common VendorID (name) of ACC.

- Sets the item's Stocking Flag to D for DIRECT.
- If indicated, marks the item as DELETED in the Created field within the Direct Buy field.
- Updates the Last Change date with the current system date.
- Updates the Who Changed field to ISGITEM.

To download and execute the ISGITEMS_ program:

- 1 Using the PSNControl window, shown in Figure 7, add ISGITEMS_ and ISGITEMS to the File Transfer List.
- 2 Click the Transfer Now button.
- 3 Once the File Transfer List shows Download Complete for both files, close PSNControl.

Figure 7: Using PSNControl

The screenshot shows the 'File Transfer from the Private Supply Network of O/PUS DNS' window. It is divided into three main sections: Step 1, Step 2, and Step 3. Step 1 includes a 'Quarter Selected' section with radio buttons for 1st, 2nd, 3rd, and 4th, where 4th is selected. Step 2, titled 'Select Files', has an 'Enter File Name:' text box, a 'Go to My PSN Files' button, and an 'Add to File Transfer List' button. Step 3, titled 'Transfer Files to D:\DDMS\W1\'', features a 'Transfer Now' button, a 'Start' time of 6:00:00 PM with a 'Start Timer' button, and a 'Stop' time of 6:30:00 PM with a date dropdown set to 11/3/2009. On the right, the 'File Transfer List' contains two entries: 'Q4ISGITEMS \Download Complete. (Rev. 10/28/2009)' and 'Q4ISGITEMS\Download Complete. (Rev. 10/28/2009)'. At the bottom, there are 'Clear File Transfer List', 'Help', and 'Exit' buttons, along with copyright information: 'Proprietary Property of and Copyrighted by OPU5, Inc. Version 1.1.186'.

- Using the DDMS (+IF)[P] screen, run the ISITEMS_ program. This converts any remaining items not carried by United that have the VendorID (name) from ISG to either the Direct Purchase vendor (manufacturer) or to SYNEX. See Figure 8.

Identifying any Remaining ISG items

After running the ISGITEMS_ program and loading the Price Plan (IT) from United, items with a Direct Buy VendorID (name) of ISG may still exist in your Item database. Since these items are no longer identified by ISG, they should be reviewed and manually maintained or deleted.

To view remaining ISG items, you can print a basic Inventory Report. We recommend you set your limits to the Direct Vendor name of ISG. You should also consider using other fields to help determine how the items should be maintained in the future or if you should delete them from your system.

We recommend you use the I-WHL Vendor field to determine whether the item is carried by one of your O/PUS loaded wholesalers other than United. If so, you could remove only the Direct Buy information for these items rather than deleting the entire item record from your inventory.

If you are a stocking dealer, you could also add information for the on-hand, on-order, and backorder quantity fields and choose not to delete those items for which you currently have on-hand stock. Items with on-order or backorder quantities should be considered for each ticket and/or purchase order before deleting the item's inventory record.

You may also decide to add additional fields to meet your unique reporting requirements.

Figure 8:
Processing the
ISITEMS_
Program

```

:BBSISGITE
This Program will Set Direct Buy Vendor for is.group Direct Items

Searching I-MFG Records .....
```

35056	ZT50TD1	SHR
-------	---------	-----

```

Total Records Updated 26204
Done.

Proprietary Property of and Copyrighted by O/PUS
```