

17-1

DOH Vendor System: Products

Objectives

Product Overview

Adding A Product

Evaluating a Product

Add a Product Group & Category

Adding Categories to a Group

About New Products

Due to variations in existing business practices (relative to the introduction and testing of new products) among managing groups (M&T, Utilities, Signing and Traffic), there is no single all-encompassing list of products. Additionally, there is no established standard in which products are processed, approved, and added to the Approved Products list (available via the web).

Currently, the New Products Coordinator must request updated lists of Approved Products from each group (M&T, Utilities, Signing and Traffic) on a regular basis. He then composes a complete list of approved products manually. As some rejected products are never entered into the DOH Vendor system, it becomes very difficult to track the history of products that get re-submitted by the Producer.

Therefore, a new process has been implemented using HiCAMS to maintain a master list of products, while still allowing individual managing groups to maintain control over the evaluation and approval of products within their group.

Authorized Users

New Product Committee Member - View, Create a New Product, Update Product Detail Info, Add Evaluators, Update Evaluator Recommendations, Add Update Approval Responsibility, Add/Update Groups, Add/Update Categories.

Materials Operations Engineer - The same rights as New Product Committee Member, with exception of Create New Product.

M&T Lab Supervisor - View, Update Product Detail Info, Add Evaluators, and Update Evaluator Recommendations.

M&T Assistant Lab Supervisor - The same rights as Lab Supervisor.

All Other HiCAMS Users - View, Update Evaluator *Recommendation* and *Comment* fields.

Navigation

DOH Vendor→Functions→Producer/Suppliers→Products

Life Cycle of a New Product

The New Product Coordinator receives information about the new product.

The New Product Coordinator enters the information into the DOH Vendor System's **Products** module, adding information to the **General**, **Contact** and **Product Detail** and **Manufacturer's Testing** tabs.

The new product is assigned to the group that the product falls under, such as Utilities, Traffic & Signing, or Materials and Test.

A notification will be sent to the appropriate group of Evaluators that product(s) have been assigned to them for evaluation. (Status = Under Evaluation).

The group or individual investigates the product over the period of time allotted and decides whether or not it should be Approved For Use.

Searching for a Product

Step 1: To search for an existing product, click **Functions→Producer/Supplier→Products**. The **Product Selection** window displays:

Product Selection

Product ID:

Status: (All)

Approval Responsibility: (All)

Group: (All)

Category: (All)

Trade Name:

Brand Name:

Manufacturer:

Distributor:

Evaluation Deadline From: 00/00/0000 To: 00/00/0000

Submitted to Committee From: 00/00/0000 To: 00/00/0000

Product ID	Status	Approval Responsibility	Group	Category	Trade Name	Brand Name

Step 2: Using the various filters, you may search for an existing product. For example, to search for all products that are currently under evaluation, you may use the *Status* field, and select “Under Evaluation”:

Product Selection

Product ID:

Status: Under Evaluation

Approval Responsibility: (All)

Group: Approved for Trial Use

Category: Approved for Use

Trade Name:

Brand Name:

Manufacturer:

Distributor:

Evaluation Deadline From: 00/00/0000 To: 00/00/0000

Submitted to Committee From: 00/00/0000 To: 00/00/0000

Product ID	Status	Approval Responsibility	Group	Category	Trade Name	Brand Name

Step 3: Click **Retrieve**. The **Product Selection** window will display the list of all products currently set to this status:

Product Selection

Product ID: Trade Name:

Status: Under Evaluation Brand Name:

Approval Responsibility: (All) Manufacturer:

Group: (All) Distributor:

Category: (All) Evaluation Deadline From: 00/00/0000 To: 00/00/0000

Submitted to Committee From: 00/00/0000 To: 00/00/0000

Product ID	Status	Approval Responsibility	Group	Category	Trade Name	Brand Name
NP00-1446	Under Evaluation	M&T	No Existing Group	No Existing Group	Tap By-Product	Tap By-Product
NP00-1445	Under Evaluation	Design Services	Other	Other	Roadbind RB Ultra Plus	Roadbind RB Ultra
NP00-1444	Under Evaluation	Design Services	Structures	Bridge Piles	Hijacker Pier Bolster	Hijacker Pier Bolster
NP00-1442	Under Evaluation	Design Services	Structures	Bridge Piles	Centraligner Pier Sled	Centraligner Pier Sled
NP00-1440	Under Evaluation	Design Services	Soil Stabilizers	Straw Tackifiers	Mulchtack 41	Mulchtack 41
NP00-1439	Under Evaluation	Design Services	Signs	Signs	Overhead Road Sign St	Overhead Road Sign St
NP00-1437	Under Evaluation	Design Services	Signs	Signs	Nex Sign Support Syst	Nex Sign Support Syst
NP00-1435	Under Evaluation	Design Services	Structures	Other	Debris Sweeper	Debris Sweeper
NP00-1434	Under Evaluation	Design Services	Noise Barriers	Other	Phase-2, PVC Unitrax	Phase-2, PVC Unitrax
NP00-1433	Under Evaluation	Design Services	Safety Items	Non-Slip Surface Items	Slipnot Safety Flooring	Slipnot Safety Floor
NP00-1432	Under Evaluation	Design Services	Concrete Sealants	Silicates	Chem Tec One	Chem Tec One
NP00-1426	Under Evaluation	Design Services	Signs	Signs	Tendrain	Tendrain
NP00-1425	Under Evaluation	Design Services	Drainage	Manhole Related Items	Baysaver Separation S	Baysaver Separation S
NP00-1424	Under Evaluation	Design Services	Specialty & Temporary It	Other	Teardrop & Pedestrian	Teardrop & Pedestrian
NP00-1423	Under Evaluation	Design Services	Specialty & Temporary It	Other	Decorative Posttop Poli	Decorative Posttop Poli
NP00-1422	Under Evaluation	Design Services	Specialty & Temporary It	Other	Posttop Luminaires RS	Posttop Luminaires
NP00-1421	Under Evaluation	Design Services	Specialty & Temporary It	Other	Sign-Vue And Panel-Vu	Sign-Vue And Panel-Vu

OK Cancel New

Step 4: Scroll through the list to locate the specific product, using the Click/Sort functionality (click the header of the column you would like to sort the list by), if necessary. Select the appropriate row and double-click or click **OK**. The **Product Maintenance** window displays:

Product Maintenance NP00-1408

Product ID: NP00-1408 Status: Under Evaluation

Approval Responsibility: Design Services

Group: Erosion Control and Landscaping

Category: Landscaping Items

Select

General Contact Product Detail Manufacturer's Testing Evaluations Dates Test Results History Report

Trade Name: Steel 'T' Fence Post

Brand Name: Steel 'T' Fence Post

Model Number:

Description: Galvanized, Hot Rolled Steel 'T' shaped Post, Support highway RW Fencing.

Primary Use:

Features/Benefits:

Composition/Formula:

Guarantees/Warranties:

Unit Price

Material Only: .00 UOM:

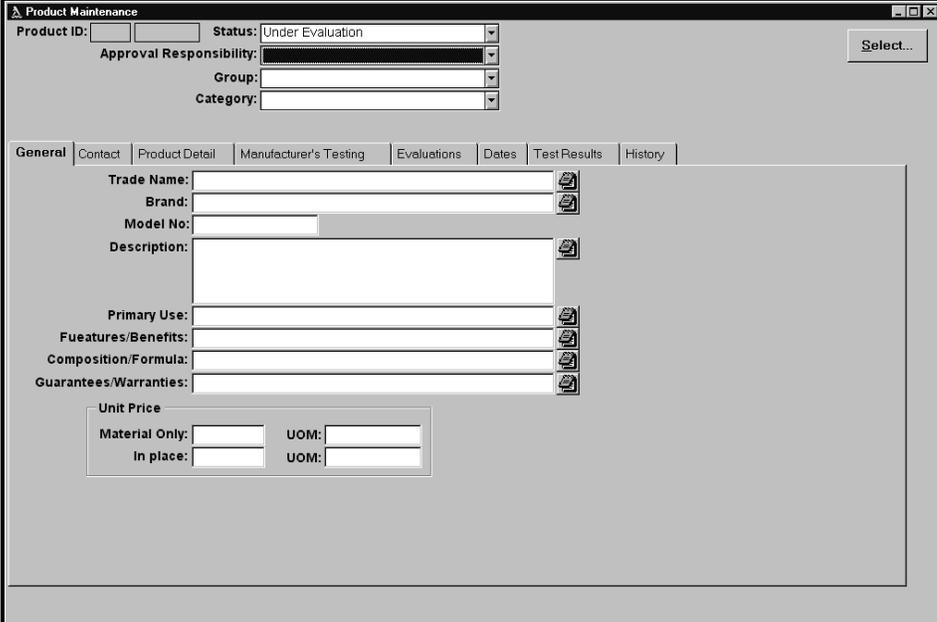
In place: .00 UOM:

Note: Only the New Product Coordinator and Materials Operation Engineer have the security rights to update information. All other users are "inquiry only".

Adding a Product

Currently, only the New Product Coordinator may add a new product.

Step 1: Click the **New** button. The **Product Maintenance** window displays:



The screenshot shows the 'Product Maintenance' window with the 'General' tab selected. The window contains the following fields and controls:

- Product ID:** Two empty text input boxes.
- Status:** A dropdown menu currently set to 'Under Evaluation'.
- Approval Responsibility:** A dropdown menu.
- Group:** A dropdown menu.
- Category:** A dropdown menu.
- Select...** button.
- General** tab (selected), with other tabs: Contact, Product Detail, Manufacturer's Testing, Evaluations, Dates, Test Results, History.
- Trade Name:** Text input field with a help icon.
- Brand:** Text input field with a help icon.
- Model No.:** Text input field.
- Description:** Large text area with a help icon.
- Primary Use:** Text input field with a help icon.
- Features/Benefits:** Text input field with a help icon.
- Composition/Formula:** Text input field with a help icon.
- Guarantees/Warranties:** Text input field with a help icon.
- Unit Price** section:
 - Material Only:** Text input field.
 - In place:** Text input field.
 - UOM:** Text input field (two instances).

Step 2: Select the status of the new product, which will typically be “**Under Evaluation**”.

Step 3: Select the group who is ultimately responsible for approval of the new product from the **Approval Responsibility** drop down menu.

Step 4: Select the product group from the **Group** drop down menu.

Step 5: Choose the category for the new product by selecting from the **Category** drop down menu.

Step 6: Add the necessary information to the **General** tab:

- Enter the *Trade Name* in the appropriate field (required).

- Type the brand name of the new product in the *Brand Name* field (required).
- Type a description of the new product in the *Description* field.
- Complete all other fields as applicable.

Step 7: Click the **Contact** tab, and enter the Producer/Supplier info.

Tip: *If the Plant ID is known, enter this number and HiCAMS will populate the Producer name automatically if the Producer exists within Vendor.*

If the Producer/Supplier is not currently in Vendor, then enter the Manufacturer information in the lower section of the window:

The screenshot shows the 'Product Maintenance <New>' window. At the top, there are several dropdown menus: 'Status' (Under Evaluation), 'Approval Responsibility' (M&T), 'Group' (Epoxies), and 'Category' (Type 1). To the right, there are text boxes for 'Updates Allowed' (Design and Service Super) and 'Evaluator'. A 'Select' button is located on the far right. Below these fields is a tabbed interface with tabs for 'General', 'Contact', 'Product Detail', 'Manufacturer's Testing', 'Evaluations', 'Dates', 'Test Results', 'History', and 'Report'. The 'Contact' tab is active. Underneath the tabs, there is a 'Search by Plant ID:' field and a 'Producer/Supplier Name:' field containing 'E-Poxy Industries, Inc., E-Poxy Industries, Inc. - Ravenna, Ny - OT12'. The bottom half of the window is split into two columns: 'Manufacturer' and 'Distributor'. Each column contains fields for 'Contact Name', 'Contact Title', 'Address', 'City', 'State', 'Zip', 'Phone', and 'Fax'. Each field has a small icon to its right, likely for data entry or lookup.

Note: *If only the salesperson name is known, enter this information in the Distributor section.*

Step 8: Select the **Product Detail** tab. Check any items that apply, based upon the Producer's information packet:

Product Maintenance <New>

Product ID: _____ Status: Under Evaluation

Approval Responsibility: M&T Updates Allowed: Design and Service Super

Group: Epoxies Evaluator: _____

Category: Type 1

General | Contact | **Product Detail** | Manufacturer's Testing | Evaluations | Dates | Test Results | History | Report

Specs Furnished by Manufacturer: Copy on File:
 Drawings, Picture or Sketch Furnished by Manufacturer: Copy on File:
 Instructions or Directions Furnished by Manufacturer: Copy on File:
 Educational Courses or Videos Furnished by Manufacturer: Copy on File:
 Is Product Patented: Patent Applied For:
 Are Quantities Limited:
 Free Sample Available:

Availability

Seasonal?:

Delivery at Site in _____ Weeks After Receipt of Order

Step 9: Select the **Manufacturer's Testing** tab. Check any items that apply, based on the Producer's information packet:

Product Maintenance <New>

Product ID: _____ Status: Under Evaluation

Approval Responsibility: M&T Updates Allowed: Design and Service Super

Group: Epoxies Evaluator: _____

Category: Type 1

General | Contact | Product Detail | **Manufacturer's Testing** | Evaluations | Dates | Test Results | History | Report

Product Usage

Used in Other State/Agency:

State/Agency Name: _____

Years In Use: _____ Remarks on File:

Product Meets Requirements of Following Specifications

AASHTO:

ASTM:

OTHER: _____

Federal Specifications: _____

Manufacturer's Test Information of File:

Note: If the "Used in Other State Agency" checkbox is checked, then the State Agency name is required.

Step 10: Click the **Evaluations** tab.

Step 11: Enter the **Evaluation Deadline** date by entering the date, or clicking the calendar icon.

The *Evaluation Deadline* is required prior to entering Evaluator names. This date will be used to send a reminder notification to each evaluator if they have not recorded a recommendation within 1 month of the deadline.

Step 12: To enter evaluators, click the Insert icon on the toolbar. A blank row will appear, and the Status will default to “Under Evaluation”:

The screenshot shows a software window titled "Product Maintenance - New". It contains several input fields and a table. The fields are: Product ID (0), Status (Under Evaluation), Approval Responsibility (M&T), Group (Epoxies), and Category (Type 1). There is a "Select" button to the right of the Status field. Below these fields is a tabbed interface with tabs for General, Contact, Product Detail, Manufacturer's Testing, Evaluations (selected), Dates, Test Results, Report, and History. The "Evaluations" tab shows an "Evaluation Deadline" of 12/30/2002 with a calendar icon. Below the deadline is a table with three columns: Comments, Recommendation, and Evaluator. The table has one row with "Under Evaluation" in the Recommendation column and a Staff icon in the Evaluator column. At the bottom of the window is a "Comments:" label followed by a large text input area.

Enter the evaluators that are responsible for the product by clicking the Staff icon next to the field. A search window will display:

Name	Office Location	Job Title	Security Organization	User ID
Frantz, Dale E	Design Services Unit	New Product Committee	Design Services	defrantz
Lorbacher, Jr., C	Design Services Unit	New Product Committee	New Product Committee Mem	not assigned
McKee, Steve	Design Services Unit	New Product Committee	New Product Committee Mem	msmckee
Sutton, Marie L	Design Services Unit	New Product Committee	New Product Committee Mem	not assigned
Wilkins, Ron	Design Services Unit	New Product Committee	New Product Committee Mem	rwilkins
Willcox, Robert	Design Services Unit	New Product Committee	New Product Committee Mem	rwillcox
Worthington, Ro	Design Services Unit	New Product Committee	New Product Committee Mem	rworthington

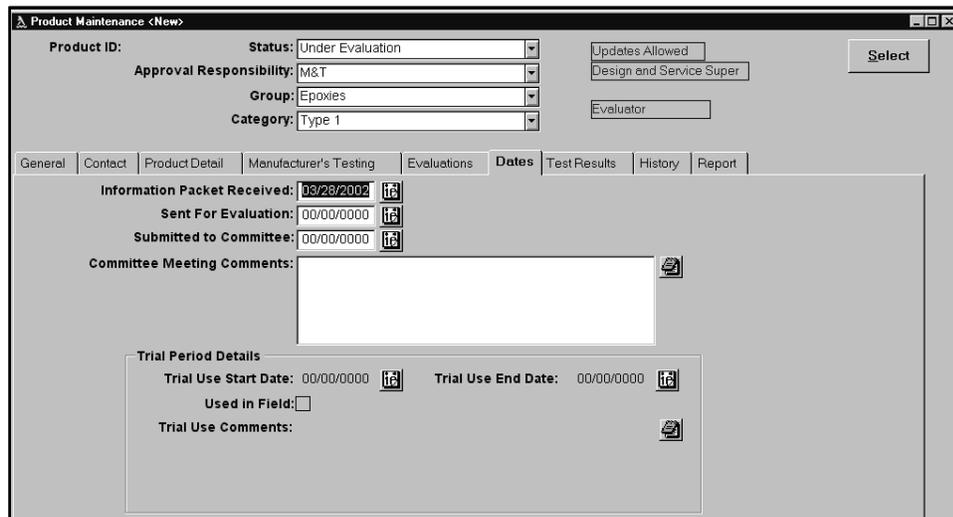
Step 13: You may enter the staff name, or simply use the available filters and click **Retrieve**. The staff name will populate in the field.

Step 14: Enter a comment, if necessary.

Note: *Multiple evaluators may be assigned by clicking the Insert icon each time a blank row is needed. Each row entered may have an individual comment applied for the evaluator, which is visible in the Comment section in the lower portion of the window, when that row is clicked:*

Comments	Recommendation	Evaluator
comment 1	Under Evaluation	Bacchi, Christopher J
comment 2	Under Evaluation	Cordle, Victor O

Step 1: Click the **Dates** tab. The *Information Packet Received* field will default to the current date. If the packet was received earlier, this date can be updated:



The screenshot shows the 'Product Maintenance <New>' window with the 'Dates' tab selected. The 'Information Packet Received' field is set to '03/28/2002'. Below it are 'Sent For Evaluation' and 'Submitted to Committee' fields, both set to '00/00/0000'. A 'Committee Meeting Comments' text area is empty. The 'Trial Period Details' section includes 'Trial Use Start Date' and 'Trial Use End Date' (both '00/00/0000'), a 'Used in Field' checkbox, and a 'Trial Use Comments' text area.

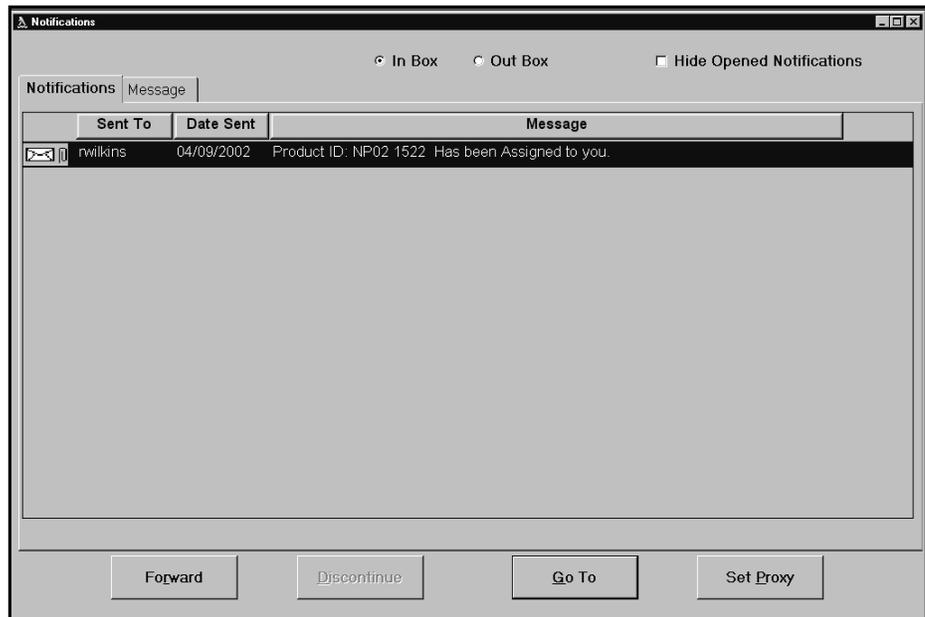
Step 15: Enter the *Sent for Evaluation* (date hard copies sent to evaluators) and the *Submitted to Committee* dates (date of Committee meeting to discuss this product).

Step 16: Click the **Save** icon on the toolbar. A notification will be sent to each evaluator listed on the Evaluator tab, to notify them that they have been designated as an evaluator for that product.

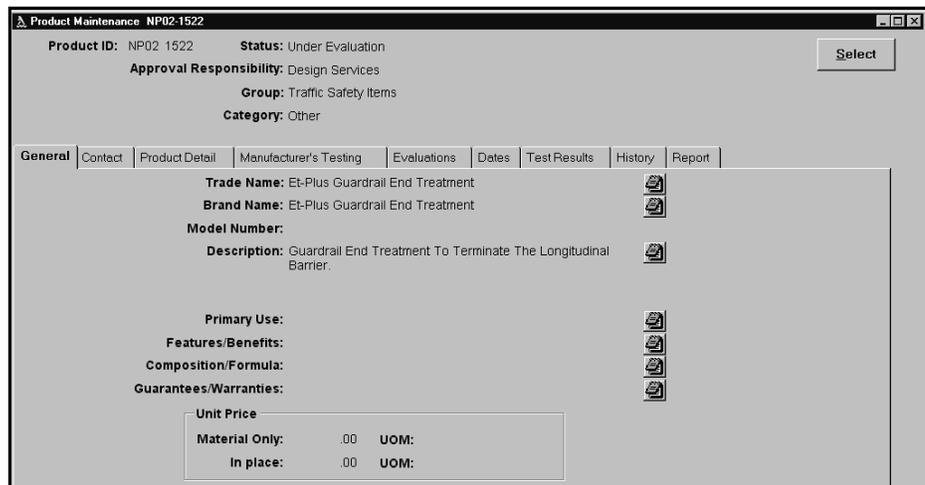
Evaluating a New Product and Making a Recommendation

The individuals who have been assigned the responsibility for the evaluation of the product receive a Notification that a product is available for evaluation.

Step 1: In the DOH Vendor System, click the **Notifications** icon to display the list of notifications:



Step 2: Select the Product Review item from the list of **Notifications** and click the **Go To** button on the bottom section of the window. The **Product Maintenance** window displays:



Note: Due to security assignments, only the New Product Coordinator may update all tabs on the Product Maintenance windows. Those users designated with the job title of "Evaluator" may make comments and change the Status on the Evaluator tab, and enter results on the Test Results tab only: After reviewing the product, the Evaluator will enter comments and make a Recommendation by changing the status accordingly. Comments that exceed the space provided in the row will be displayed in the lower portion of the window:

Product Maintenance: NP02 1522

Product ID: NP02 1522 Status: Under Evaluation Updates Allowed Select

Approval Responsibility: Design Services

Group: Traffic Safety Items Evaluator

Category: Other

General Contact Product Detail Manufacturer's Testing **Evaluations** Dates Test Results History Report

Evaluation Deadline: 09/15/2002

Recommendation	Comments	Evaluator
Under Evaluation		Robertson, David W
Under Evaluation		Styles, Dewayne
Under Evaluation		Whitley, Battie

Comments:

Step 3: If appropriate, enter test results on the **Test Results** tab.

Note: *If there is a Test Format for the product, space for entry of test results will appear on the Test Results tab. Otherwise, simply enter Comments:*

Product Maintenance: NP02 1522

Product ID: NP02 1522 Status: Under Evaluation Updates Allowed Select

Approval Responsibility: Design Services

Group: Traffic Safety Items Evaluator

Category: Other

General Contact Product Detail Manufacturer's Testing Evaluations Dates **Test Results** History Report

No test results are defined for the selected Approval Responsibility and Group.

Test Result Comments

Enter comments here

The following is an example of the **Test Results** tab for a product with a Test Format:

Product Maintenance NP02-3812

Product ID: NP02 3812 Status: Under Evaluation Updates Allowed
 Approval Responsibility: M&T Design and Service Super Select
 Group: Epoxies Evaluator
 Category: Other

General | Contact | Product Detail | Manufacturer's Testing | Evaluations | Dates | **Test Results** | History | Report

Epoxy

Lab Number:
 Test Date: 04/17/2002
 Viscosity (Poises @ 77 +/- 2degF):
 Pot Life (minutes):
 Compressive Strength 1 Day (PSI):
 Compressive Strength 7 Day (PSI):

Test Result Comments

 Delete Test Result

Step 4: In the **Evaluation** tab, select the appropriate status from the drop down list:

Product Maintenance NP02-1522

Product ID: NP02 1522 Status: Under Evaluation Updates Allowed Select
 Approval Responsibility: Design Services
 Group: Traffic Safety Items Evaluator
 Category: Other

General | Contact | Product Detail | Manufacturer's Testing | **Evaluations** | Dates | Test Results | History | Report

Evaluation Deadline: 05/15/2002

Recommendation	Comments	Evaluator
Under Evaluation		Robertson, David W
Approved for Use		Sykes, Dewayne
Conceptually Approved		Whitley, Battle
No Action Taken		
No Further Consideration		
Under Evaluation		
Usage Not Recommended		
Void		

Comments:

Step 5: Click the **Save** icon. Recommendations are saved and a comment is written to the **History** tab.

Revised 12/7/2012 - renumbered because of addition of Project Closeout module.
 MBNovello