



CHANGE MIN-MAX VALUE (PLANNING)

INV

QUICK REFERENCE GUIDE INV-24

Purpose

The purpose of this Quick Reference Guide (QRG) is to provide a step-by-step explanation on how to Change Min-Max Value (Planning) in the North Carolina Financial System (NCFS).

Introduction and Overview

This QRG covers the steps to change min-max value (planning) in NCFS.

Change Min-Max Value (Planning)

To change min-max value (planning) in NCFS, please follow the steps below:

1. Log in to the NCFS with your credentials to access the system.
2. On the **Home** page, under the **Tools** tab, click the **Scheduled Processes** app.

Good afternoon, Training Super User 1!

< Expenses Procurement My Enterprise **Tools** Configuration Others

QUICK ACTIONS

- Manage Collaboration Messaging History
- AI Apps Administration

APPS

- Set Preferences
- Alerts Composer
- Developer Connect
- Worklist
- Reports and Analytics
- Scheduled Processes**

3. On the **Overview** page, click the **Schedule New Process** button.

Overview ?

► Search Saved Search Last hour ▼

Search Results ?

View Flat List Hierarchy

Actions ▼ View ▼ **Schedule New Process** Resubmit Put On Hold Cancel Process Release Process View Log ↻

Name	Process ID	Status	Scheduled Time	Submission Time
IDCS Sync Notification	2177654	Wait	5/17/23 1:42 PM EDT	5/17/23 1:12 PM EDT
Ingesting attachments to OSCS	2177653	Wait	5/17/23 1:22 PM EDT	5/17/23 1:12 PM EDT
ESS process to check Search Cloud Service availability	2177652	Wait	5/17/23 1:17 PM EDT	5/17/23 1:12 PM EDT
Rebuild Learning Item Stop Word Index	2177651	Wait	5/17/23 1:15 PM EDT	5/17/23 1:11 PM EDT

4. On the *Schedule New Process* pop-up, click the **Name** drop-down choice list.

Schedule New Process

Type Job Job Set

Name ▼

Description

OK Cancel

5. Click the **Search** link.

Schedule New Process

Type Job Job Set

Name

Description

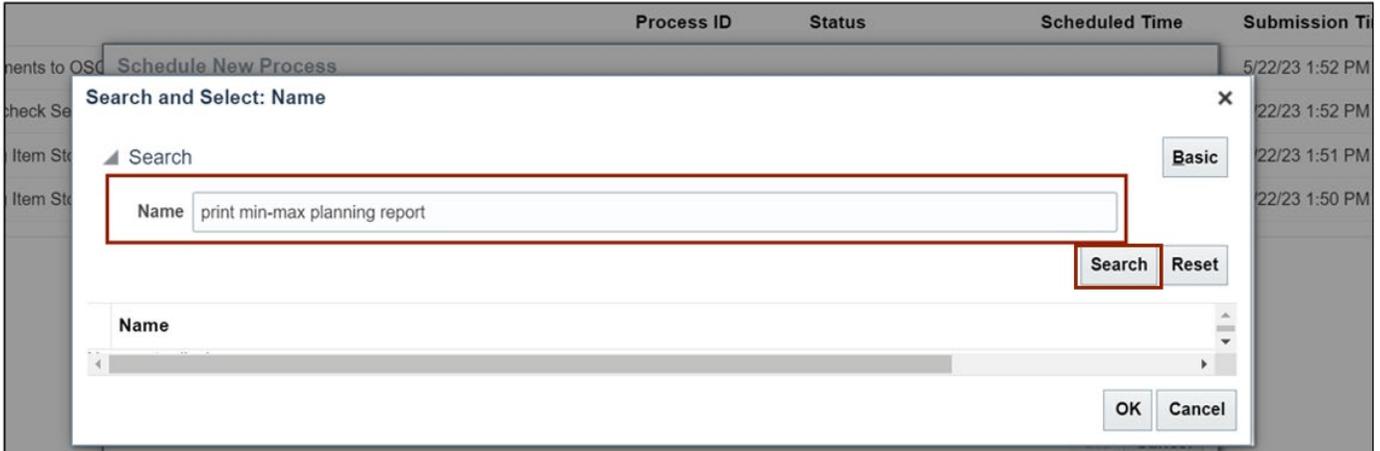
- Evaluate Absences: Subprocess
- Process Events
- Process Events: Subprocess
- Migrate Previous Versions of Absence Data
- Dependent Job
- Advanced Controls Notifications
- Update Accrual Plan Enrollments
- Update Accrual Plan Enrollments: Subprocess
- Calculate Accruals and Balances
- Calculate Accrual and Balances: Subprocess

Search...

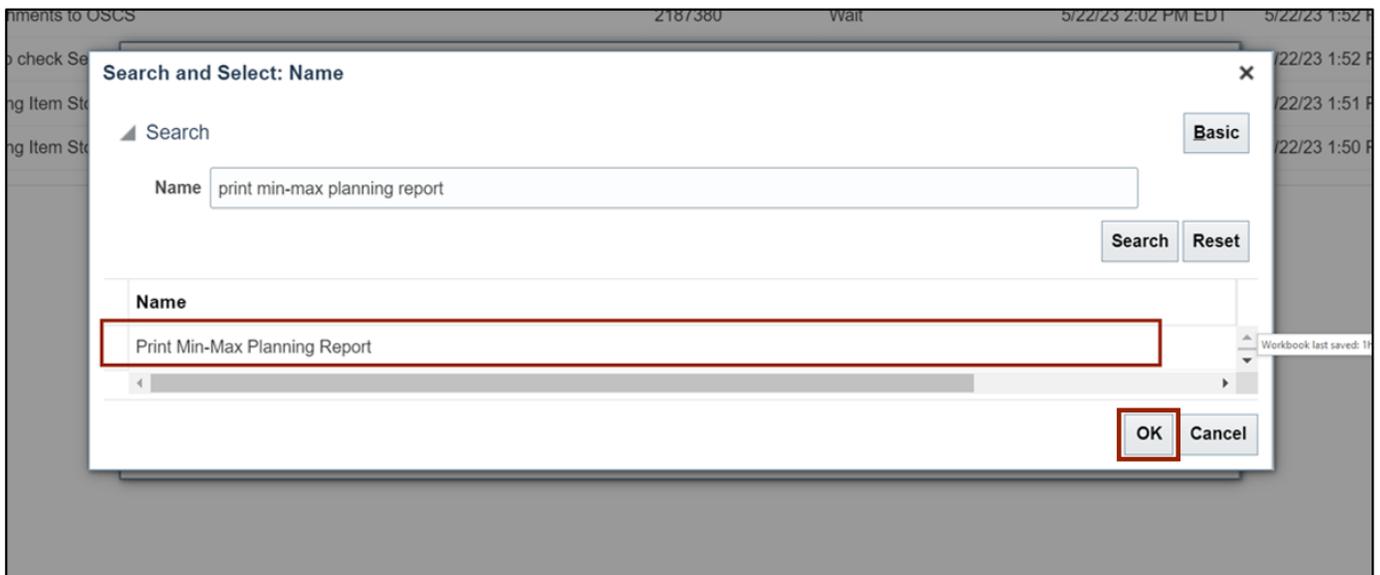
OK Cancel

6. On the *Search and Select: Name* pop-up, enter the **Name**.

In this example, we choose **Print Min-Max Planning Report**. Click the **Search** button.



7. From the search results, click the **Print Min-Max Planning Report** option. Click the **OK** button.



- The *Process Details* pop-up appears. Enter the required parameters such as **Organization**, **Sort By**, **Planning Level**, **Item Selection**.

Process Details ✕

i This process will be queued up for submission at position 2

Process Options Advanced Submit Cancel

Name Print Min-Max Planning Report Print output v

Description Calculates min-max planning replenishment level... Notify me when this process ends

Schedule As soon as possible **Submission Notes**

Basic Options

Parameters

* **Organization** v

* **Sort By** v

From Item v

To Item v

* **Planning Level** v

* **Item Selection** v

Subinventory

- Scroll down to view the **Restock** field. Ensure that the field shows **No**.

Demand Cutoff Date Offset

Supply Cutoff Date 📅

Supply Cutoff Date Offset

* **Restock** v

Ship-to Location v

10. Click the **Submit** button.

The screenshot shows a 'Process Details' window with a close button (X) in the top right corner. An information icon (i) indicates 'This process will be queued up for submission at position 2'. At the top, there are four buttons: 'Process Options', 'Advanced', 'Submit' (highlighted with a red box), and 'Cancel'. Below these buttons, the 'Name' is 'Print Min-Max Planning Report', 'Description' is 'Calculates min-max planning replenishment level...', and 'Schedule' is 'As soon as possible'. There are checkboxes for 'Print output' and 'Notify me when this process ends'. A 'Submission Notes' text box is also present. The 'Basic Options' section is expanded, showing parameters: '* Organization' (4210451), '* Sort By' (Inventory item), 'From Item', 'To Item', '* Planning Level' (Organization), and '* Item Selection' (All min-max planned items). A 'Subinventory' field is partially visible at the bottom.

11. The *Confirmation* pop-up appears, click the **OK** button.

This screenshot shows the same 'Process Details' window as above, but with a 'Confirmation' pop-up dialog box overlaid in the center. The dialog box has a green checkmark icon and the text 'Confirmation' and 'Process 2187402 was submitted.'. The 'OK' button in the dialog box is highlighted with a red box. The background window is dimmed, but the 'Submit' button remains highlighted with a red box. On the right side of the background window, a table titled 'Submission' is partially visible with columns for date and time.

Submission	
DT	5/22/23 1:52
DT	5/22/23 1:52
DT	5/22/23 1:51
DT	5/22/23 1:50

12. Select the report and Click the **Republish** [] icon.

ESS process to check Search Cloud Service availability	2187403	Wait	5/22/23 2:17 PM EDT	5/22/23 2:12 PM EDT
Print Min-Max Planning Report	2187402	Succeeded	5/22/23 2:11 PM EDT	5/22/23 2:11 PM EDT
Rebuild Learning Item Stop Word Index	2187401	Wait	5/22/23 2:15 PM EDT	5/22/23 2:11 PM EDT
Rebuild Learning Item Stop Word Index	2187400	Succeeded	5/22/23 2:11 PM EDT	5/22/23 2:11 PM EDT

Process Details | Status Details

Print Min-Max Planning Report, 2187402

Status: Succeeded | Schedule Start: 5/22/23 2:11 PM EDT | External Job Type: BIP Job | External Job Status: NA

Log
Attachment: [ESS_L_2187402](#)

Output

Output & Delivery

XML Data | Diagnostic Log | **Republish** []

Status: All

Output Name	Template	Format	Locale	Time Zone	Calendar	Status
Default Document	Min-Max Report	HTML	English (United States)	(UTC-05:00) New York - Eastern Time (ET)		

13. Click the **Action** [] icon. Under **Export** format options, select **PDF**.

Sort-by Code: 1 | Range: 1 | Item Select: 149

From Item: | To Item: | Category Select: (b.segment1||b.segment2)

Organization ID: 300000077127516 | Planning Level Code: 1 | Item Selection Code: 3

Category Set ID: | Subinventory: | Order-by Clause: order by 1

Sorter: Category | Batch Prefix: | Lot Control Code: 3

Min-Max Report

Export

- HTML
- PDF**
- RTF
- Excel (*.xlsx)
- PowerPoint (*.pptx)
- Data

14. Review the report.

ORACLE CENTRAL SUPPLY WAREHOUSE - DIS		Min-Max Report						Report Date 5/22/23 2:22 PM Page 1 of 51			
Item Description	Sort By	Minimum Quantity	Maximum Quantity	On-Hand Quantity	Supply Quantity	Demand Quantity	Available Quantity	Order Quantity Minimum	Order Quantity Maximum	Multiple	Reorder Quantity
0001866/ ORANGE JUICE, UNSWEETENED , 12/46 OZ CANS/CASE		3,300	19,000	2,337	0	0	2,337		19,000	1	16,663
0001867/ APPLE JUICE, UNSWEETENED , 12/46 OZ CANS/CASE		3,800	9,600	1,414	0	0	1,414		9,600	1	8,186
0001868/ V-8 JUICE, LOW SODIUM, 48/5- 1/2 OZ CANS/CASE		100	630	234	0	0	234		630	1	0
0001871/ SWEET & LOW, 2000 INDIVIDUAL PACKS/CASE		700	12,000	1,538	0	0	1,538		12,000	1	0
0001882/ APPLES, CANNED, 6/#10		3,000	25,000	1,091	0	0	1,091		30,000	1	23,909

Update Min-Max Value

To update min-max value in NCFS, please follow the steps below:

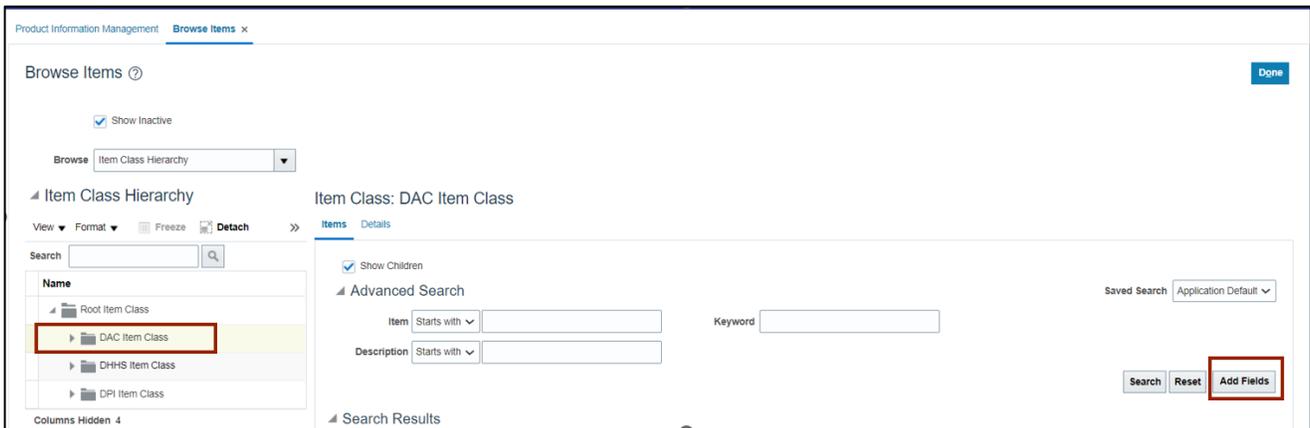
1. Log in to the NCFS with your credentials to access the system.
2. Click the **Product Management** tab and click the **Product Information Management** app.



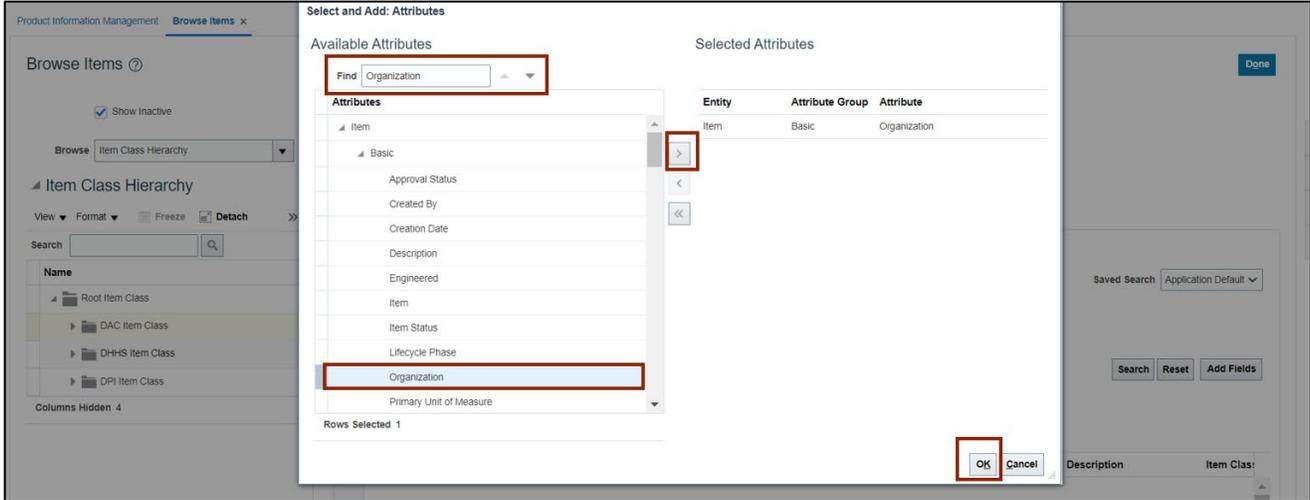
3. Click the **Tasks** icon. Under the *product Information Management* section. Click the **Browse Items** link.



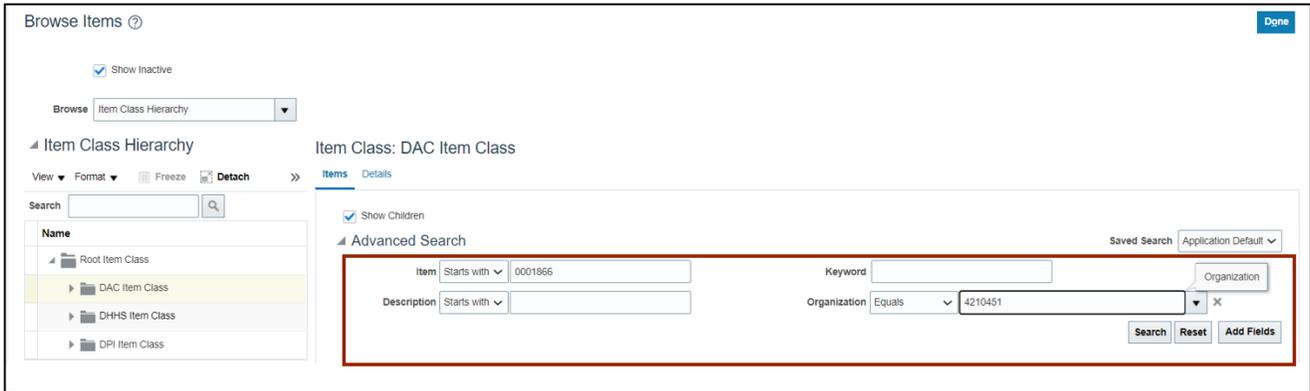
4. Select the **DAC Item Class** under the *Name* section and click the **Add fields** button.



5. Find the **Organization** attributes, click the arrow [>] then click the **OK** button.



6. Enter the parameters: **Items and Organization**, we choose Item **0001866** and Organization **4210451**, and click the **Search** button.



7. Click the **Items** link.

The screenshot shows the 'Browse Items' interface. On the left, there is a tree view for 'Item Class Hierarchy' with 'DAC Item Class' selected. The main area shows search filters: 'Item Starts with' is set to '0001866', 'Organization' is '4210451', and 'Advanced Search' is checked. Below the filters is a table of search results. The first row is highlighted with a red box around the 'Item' column value '0001866'. The table columns are: Item, Description, Approval Status, Item Status, Long Description, and Item Class.

Item	Description	Approval Status	Item Status	Long Description	Item Class
0001866	ORANGE JUICE, UNSWEETENED, 12/46 OZ CANS/CASE	Approved	Active	GRADE A, USDA CERTIFICATE O...	DAC Item C

8. Click the **Specifications** tab, then click the **Planning** link.

The screenshot shows the 'Edit Item: 0001866 (4210451)' interface. The 'Specifications' tab is selected and highlighted with a red box. The left sidebar has a 'Planning' link also highlighted with a red box. The main area shows planning settings for 'Item Organization: Planning'. Under 'General Planning', 'Inventory Planning Method' is 'Min-max planning'. Under 'Min-Max Quantity', 'Minimum' is 5,000 and 'Maximum' is 20,000. Other settings include 'Planner', 'Order Quantity' (Minimum 19,000), 'Source', 'Replenishment Type' (Supplier), and 'Order Modifiers' (Fixed Order Quantity, Fixed Days Supply, Fixed Lot Size Multiplier).

9. Under the Min-Max Quantity, update the **Minimum** and **Maximum**.

The screenshot shows the 'Edit Item' interface for item 0001866 (4210451). The 'Item Organization: Planning' section is expanded to 'General Planning'. Under 'Inventory Planning Method', 'Min-max planning' is selected. The 'Min-Max Quantity' section has two input fields: '* Minimum' with the value '7,000' and '* Maximum' with the value '25,000'. These two fields are enclosed in a red rectangular box. Other fields like 'Planner', 'Subcontracting Component', 'Order Quantity', 'Source', and 'Order Modifiers' are also visible.

10. Click the **Save** button.

This screenshot shows the same 'Edit Item' page, but now the 'Save' button in the top right corner is highlighted with a red box. The 'Save' button is part of an 'Actions' menu that also includes 'Cancel', 'Save and Close', and 'Save to Change Order'. The 'Min-Max Quantity' fields are no longer highlighted.

Wrap-Up

Change min-max value (planning) using the steps above in NCFS.

Additional Resources

Virtual Instructor-Led Training (vILT)

- INV 105: Warehouse Management (ILT)