



DHHS Inventory Item Creation/Maintenance Job Aid

INV

QUICK REFERENCE GUIDE INV-41

Purpose

The purpose of this Quick Reference Guide (QRG) is to provide step-by-step explanation of how to Create and Manage new items, Associate items to the 3000DHHSNI Non-Inventory Organization, Associate items to DHHS Non-Inventory SSP Organization, Associate DHHS items to Inventory Organizations, Associate existing items to additional DHHS Inventory Organizations, Associate DHHS items to an Organization when a Replenishment Source Organization is an Organization(warehouse), update MIN/MAX Value (Planning) and other attributes for the Inventory Organization in the North Carolina Financial System (NCFS).

This QRG is to be used in conjunction with Virtual Instructor-Led Training (VILT) **INV101: Inventory Agency Manager**, **INV102: Inventory Cost Accounting**, and **INV109: Inventory Item Maintenance** as well as **INV-08 QRG** and **INV-04 QRG** found here: <https://www.osc.nc.gov/training/ncfs-help-documents>

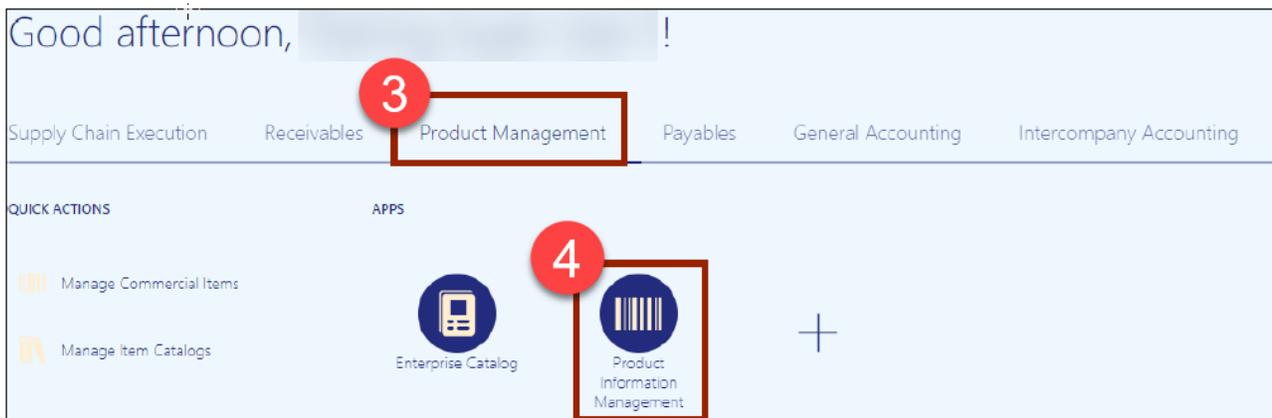
Introduction and Overview

Inventory Item Management is the process of managing the items for use in a cycle of ordering, storing, selling, and restocking products. The Department of Health and Human Services (DHHS) will be responsible for adding and maintaining items in the item master. DHHS has a separate item class within the item master titled **DHHS ITEM CLASS**.

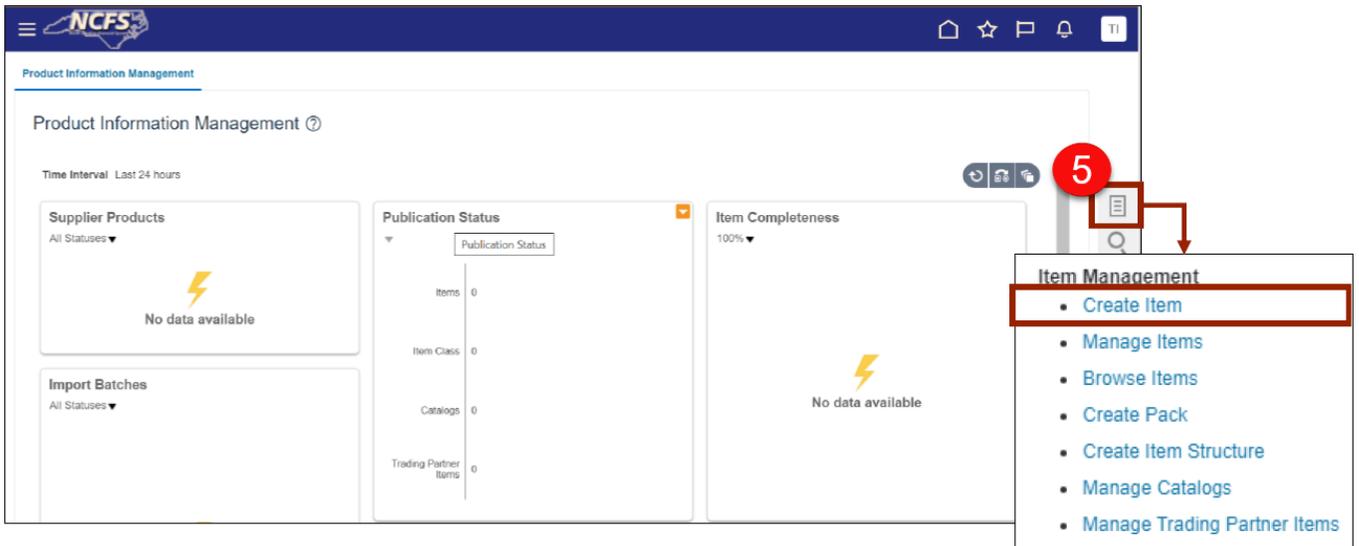
Create and Manage New Items

To Create and manage new items in NCFS, please follow the steps below:

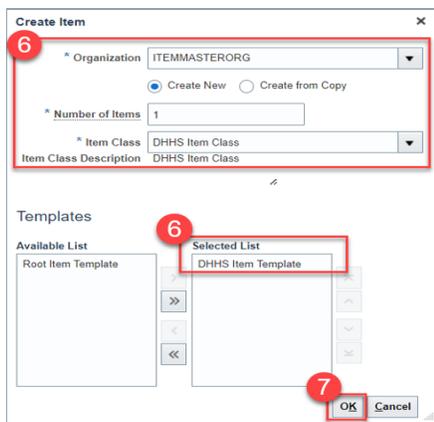
1. Navigate to the NCFS environment with this link: <https://osc.nc.gov/ncfslogin>.
2. Log in to the NCFS portal with your credentials to access the system.
3. On the Home page, click **Product Management** tab.
4. Click the **Product Information Management** app.



5. The Inventory Management Dashboard page will appear, click the **Tasks** Icon on the right-hand side of screen and then click **Create Item**.



6. In the **Create Item** dialog box, provide values for the following fields:
 - i. **Organization** defaults to **(ITEMMASTERORG)**.
 - ii. **Create New** radio button selected.
 - iii. **Number of Items**.
 - iv. **Item Class (DHHS Item Class)**.
 - v. **Template** defaults to **(DHHS Item Template)** in **Selected List**.
7. Click **OK**.



8. New **Item number** is system generated as shown (for DHHS).
9. Enter **Item Description** (80 Character length).
10. Enter **Item Long Description** if needed (2000 Character length).

11. Select the **Primary Unit of Measure**.

The screenshot shows the 'Create Item' form with the following fields and callouts:

- 8**: Item field containing '300XXXXXXXX'
- 9**: Description field containing 'DHHS Test Item Entry'
- 10**: Extended Description field containing 'DHHS Test Item Entry Extended Description'
- 11**: Primary Unit of Measure dropdown menu set to 'EACH'

Other visible fields include Item Class (DHHS Item Class), Approval Status (Approved), Completeness Score, Created By (FD0815116), Item Status (Active), Lifecycle Phase (Production), User Item Type (Purchased Item), Pack Type, Revision (0), and Creation Date (9/27/23 10:36 AM).

12. Click on **Categories**.

13. Click the **Actions** drop down and select **Add Row**.

The screenshot shows the 'Create Item' form with the 'Categories' tab selected. The 'Actions' dropdown menu is open, showing the following options:

- 13**: Add Row (highlighted)
- Delete
- Export to Excel

Other visible fields include Item, Description, Item Class, Approval Status, Completeness Score, Created By, Item Status, Lifecycle Phase, User Item Type, Pack Type, Revision, and Creation Date.

14. In the **Catalog** field, Select **NC Catalog**.

15. In the **Category** field, select the appropriate **UNSPSC Category Code** (Reference existing list of like items for UNSPSC Category Codes).

16. Category Code and Description will populate upon Category selection.

Product Information Management Create Item x

Create Item ?

No items to display

None +

* Item 300XXXXXX

* Description DHHS Test Item Entry

Item Class DHHS Item Class

Approval Status Approved

Completeness Score

Created By P00815116

Item Status Active

Lifecycle Phase Production

User Item Type Purchased Item

Pack Type

Revision 0

Creation Date 3/5/24 11:01 AM

Overview Specifications Structures Attachments Associations Relationships Categories Quality

Actions View Format + X Freeze Wrap Catalogs All Associations All

Catalog	Controlled At	Category	Category Code	Hierarchy	Description	Start Date	End Date
NC Catalog	Master Level	551015-Printed pul	551015		551015-Printed publications	3/5/24	m/d/yy

17. Click on Specifications tab, then click on DHHS Additional Attributes.

18. Enter the item Unit of Purchase (UOP), Conversion Factor, Stock Keeping Unit (SKU), and Conversion Class.

19. Click Save.

Create Item ?

No items to display

None +

* Item 300XXXXXX

* Description DHHS Test Item Entry

Item Class DHHS Item Class

Approval Status Approved

Completeness Score

Created By P00815116

Item Status Active

Lifecycle Phase Production

User Item Type Purchased Item

Pack Type

Revision 0

Creation Date 3/5/24 11:01 AM

Overview Specifications Structures Attachments Associations Relationships Categories Quality

Item: DHHS Additional Attributes

Transactional Attributes

Additional Attributes

DHHS Additional Attributes

Item Revision

Additional Attributes

Item Organization

Manufacturing

Service

Inventory

Physical Attributes

Sales and Order Management

Planning

Purchasing

Catalog STCK

Price Option A

Seasonal Item

UOP EA EACH

Conversion Factor 1

SKU EA EACH

Conversion Class INTRAClass

Save Cancel

20. The new Item number will be displayed.

*******STOP HERE*******

If the new Item Creation requires a Intra/Inter Class UOM Conversion, pause at Step 18 above and email the new Item number, Unit of Purchase, Unit of Measure (SKU) and Conversion Factor to NCFS@osc.nc.gov for processing. Once the request is processed by OSC, the agency will be notified, then New Item Creation steps can be continued below.

3000DHHSNI Non-Inventory Organization Item Association

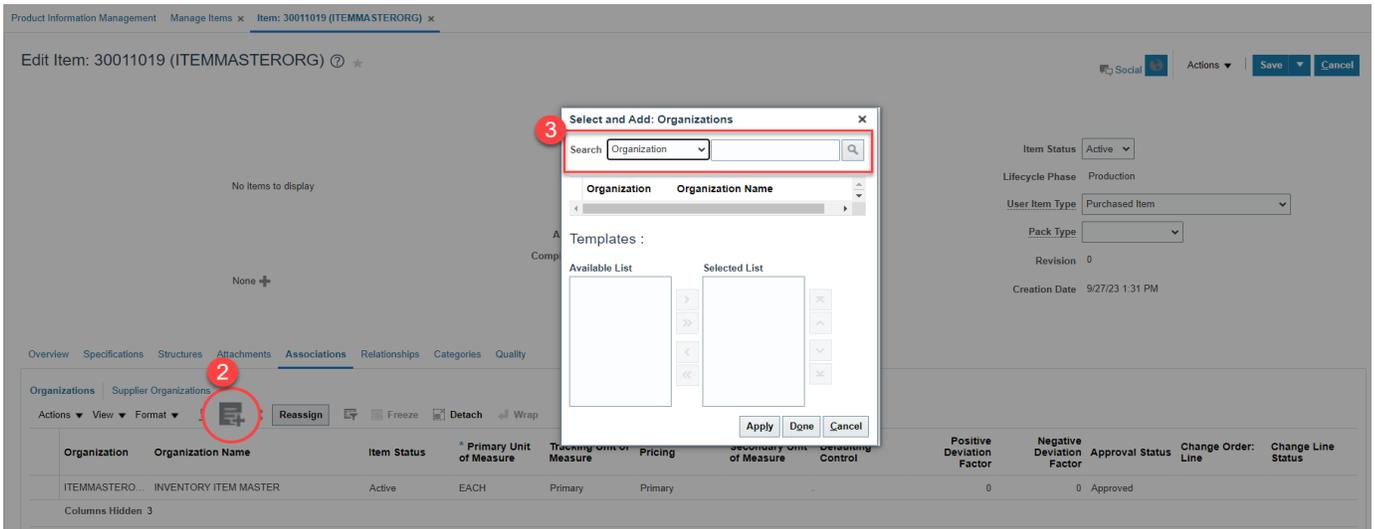
To Associate a New Item to your 3000DHHSNI Non-Inventory Organization in NCFS, please follow the steps below:

1. Click on the **Associations** Tab for the newly created item.

2. Click the **Select and Add** Icon or Click the **Actions** drop down and **Select and Add** and a Pop-up window will appear to **Select and Add: Organizations**.

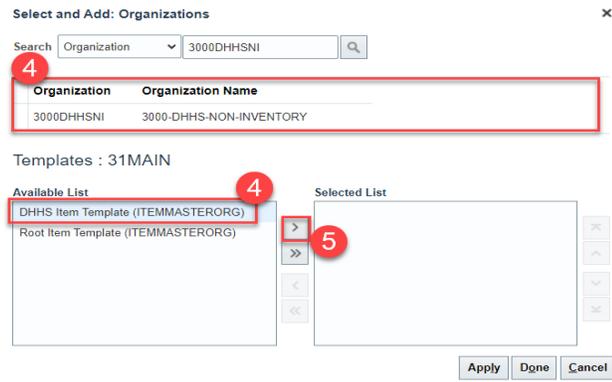


3. Enter the **3000DHHSNI** Non-Inventory Organization to Associate item to and Click the **Search** button.

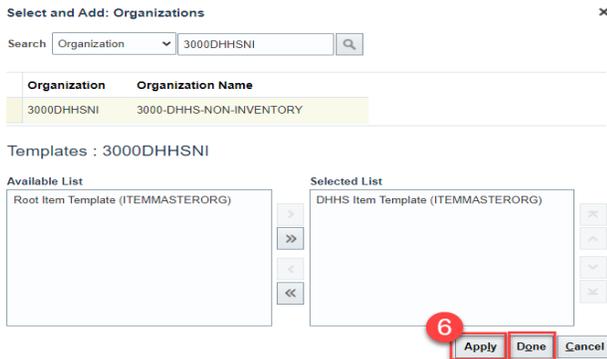


*****NOTE: Always Associate New Items to the Non-Inventory Organization 3000DHHSNI (3000-DHHS-NON-INVENTORY) first*****

4. Select the **Organization** and the **DHHS Item Template (ITEMMASTERORG)** will populate under **Available List**.
5. Click the **Single Arrow** to move this template to the **Selected List**.

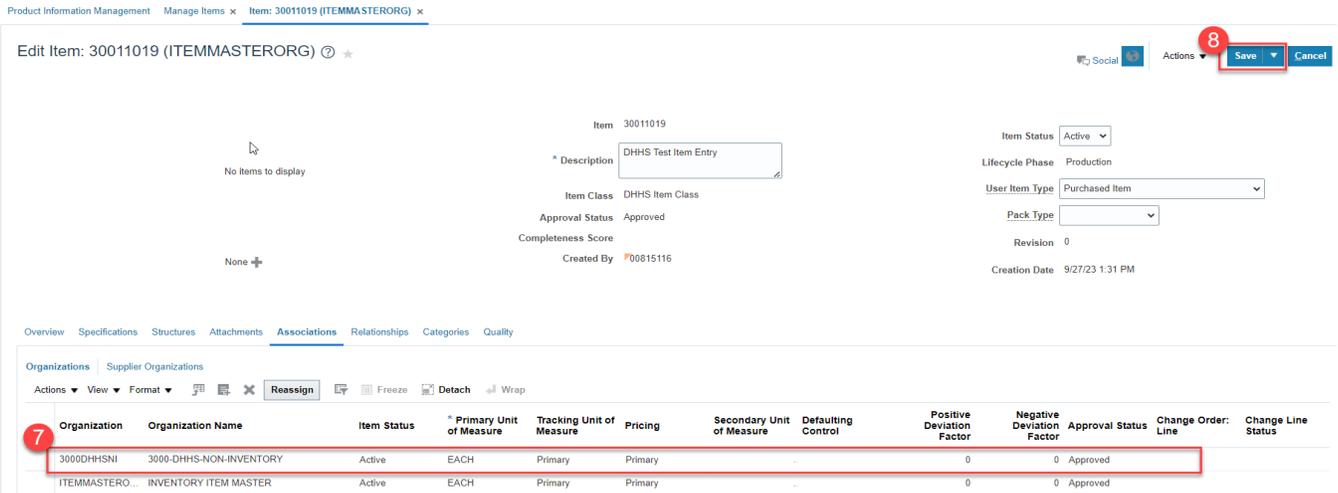


6. Click **Apply** and then **Done**.



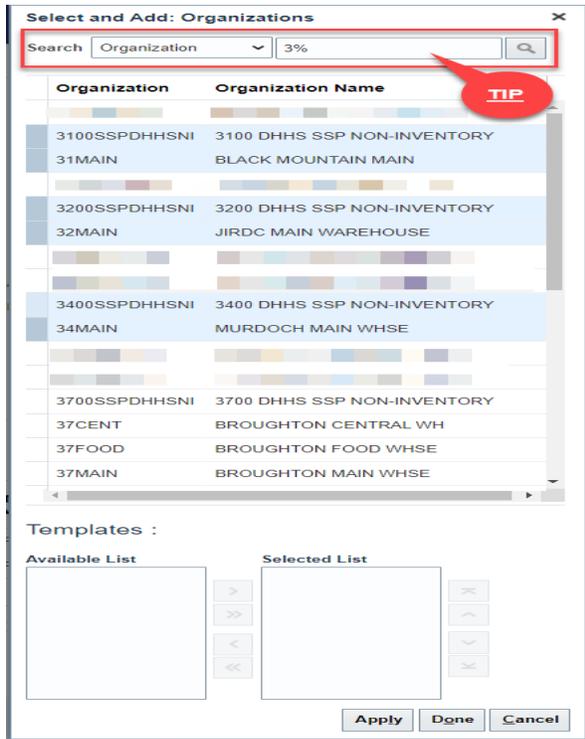
7. The newly Associated DHHS Non-Inventory Organization will now appear under the item's **Associations** tab.

8. Click **Save**.



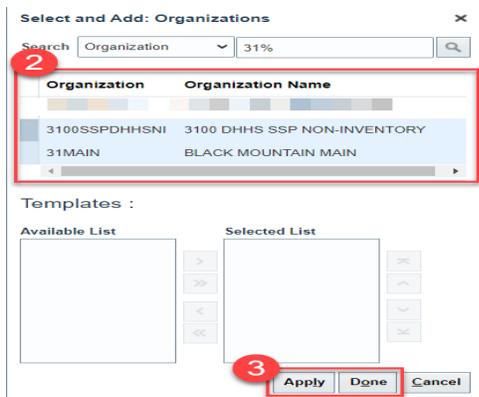
TIP: When Selecting and Adding Organizations/Association to an Item, you can pull up a complete list of DHHS warehouses, 3000DHHSNI Non-Inventory Organization and SSP Non-Inventory Organizations using a numeric character and percentage sign (**3%**).

This will allow you to select multiple Organizations for Item association at once by pressing the Control (Ctrl) key and clicking multiple Organizations. Note: The Organization Templates will not display, but the **DHHS Item Template (ITEMMASTERORG)** will be selected for all Organizations selected.



DHHS Inventory Organization Association

1. Repeat steps 1-8 to add additional DHHS Organization associations to the newly created item. **See Example below*****
2. When Associating an Item to a DHHS Organization, you must also select the DHHS Non-Inventory SSP Organization as well. **For an item in 31MAIN, 3100SSPDHHSNI organizations, in addition to 3000DHHSNI that was previously selected.**
3. Click **Apply** and **Done**.



4. The newly Associated DHHS Inventory Organization and SSP Non-Inventory Organization will now appear under the item's **Associations** tab.

5. Click Save.

Item: 30011019 (ITEMMASTERORG) x

Edit Item: 30011019 (ITEMMASTERORG) ☺ ✖

Item 30011019

Description: DHHS Text Item Entry

Item Class: DHHS Item Class

Approval Status: Approved

Completeness Score

Created By: P00815116

Item Status: Active

Lifecycle Phase: Production

User Item Type: Purchased Item

Pack Type

Revision: 0

Creation Date: 9/27/23 1:31 PM

Overview Specifications Structures Attachments **Associations** Relationships Categories Quality

Organizations Supplier Organizations

Actions View Format Reassign Freeze Detach Wrap

Organization	Organization Name	Item Status	Primary Unit of Measure	Tracking Unit of Measure	Pricing	Secondary Unit of Measure	Defaulting Control	Positive Deviation Factor	Negative Deviation Factor	Approval Status	Change Order Line	Change Line Status
ITEMMASTER0	INVENTORY ITEM MASTER	Active	EACH	Primary	Primary			0	0	Approved		
3000DHHSNI	3000-DHHS-NON-INVENTORY	Active	EACH	Primary	Primary			0	0	Approved		
3100SSPDHHSNI	3100 DHHS SSP NON-INVENTORY	Active	EACH	Primary	Primary			0	0	Approved		
31MAIN	BLACK MOUNTAIN MAIN	Active	EACH	Primary	Primary			0	0	Approved		

Adding Item to a Sub-Inventory Location within a Warehouse

1. Navigate to My Enterprise.
2. Select Setup and Maintenance.

Good morning, NATLYNN STEIN

My Enterprise Tools Others

QUICK ACTIONS

Available Features

OFFERS

New Features

Feature Updates

Setup and Maintenance

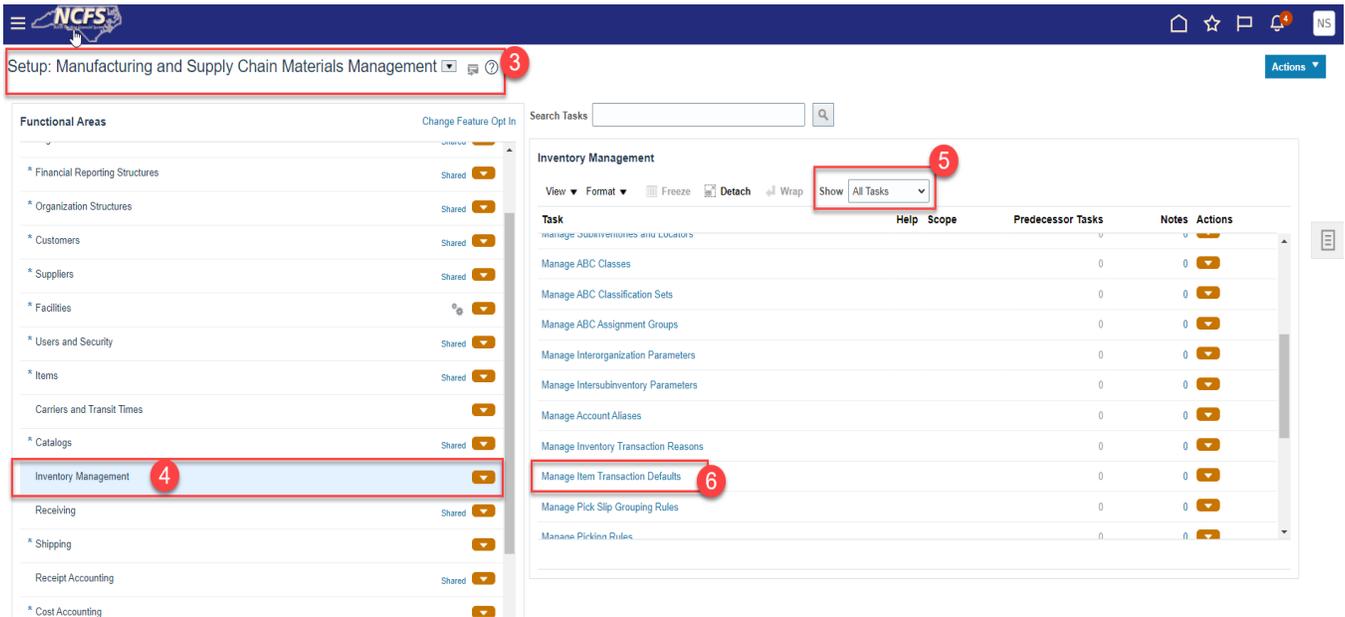
Analytics

Cash Management Infolets General Accounting Infolets Plan to Produce Infolets Order to Cash Infolets

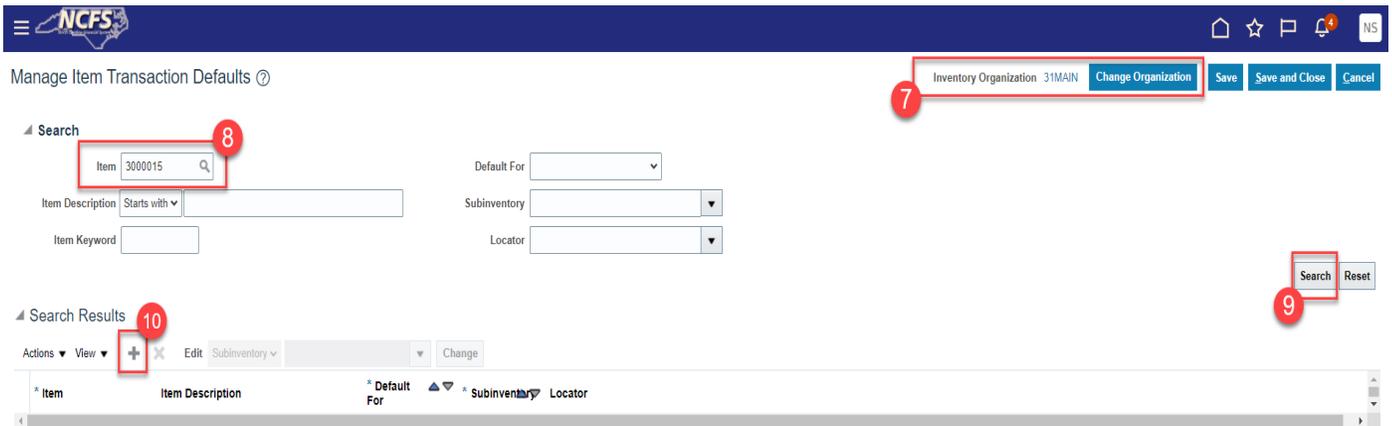
3. Select Manufacturing and Supply Chain Materials Management.
4. Select Inventory Management.
5. Change the Show field drop down to "All Tasks".



6. Select Manage Items Transaction Defaults.



7. Select the appropriate Inventory Organization.
8. Enter the Item number.
9. Click Search.
10. Click the +(plus) sign to add the Item to a Sub-Inventory.



11. Enter the item number in the item field.
12. The item description will populate.
13. Select "Receiving" from the Default For drop down list.
14. Select the appropriate Sub-inventory from the drop down list.

15. Click Save and Close.

16. Navigate back to Inventory Management Functional Area and Select Manage Subinventories and Locators.

Task	Help	Scope	Predecessor Tasks	Notes	Actions
Manage Inventory Profile Options			0	0	
Manage Inventory Lookups			0	0	
Manage Inventory Value Sets			0	0	
Manage Inventory Descriptive Flexfields			0	0	
Manage Inventory Account Alias Key Flexfield			0	0	
Manage Inventory Locator Key Flexfield			0	0	
Manage Inventory Transaction Sources and Types			0	0	
Manage Material Statuses			0	0	
Manage Subinventories and Locators			0	0	
Manage ABC Classes			0	0	

17. Select the appropriate Inventory Organization.

18. Enter appropriate search criteria if known or click the Search button to pull up all valid Subinventories.

19. Click on the appropriate Subinventory row.



20. Click on Manage Item Subinventories button.

Manage Subinventories ?

Inventory Organization 31MAIN Change Organization Done

17

18

18

Search

Subinventory Equals Subinventory Type Equals

Description Equals Material Status

Locator Control Equals

18

Search Results

19

20

Manage Item Subinventories Manage Locators

Subinventory	Description	Active	Material Status	Locator Control	Subinventory Type	Additional Information	End Date	Location	Default Locator Status	Locator Structure	Default Replenishment Count Type	Picking Order	Asset subinventory	Depreciable	Quar track
FC01	MAIN WHSE A...	✓	Active	None	Storage			31MAIN-932 OLD US 70		Four-Segment L...	Order par	10	✓	—	✓
FD01	MAIN WHSE A...	✓	Active	None	Storage			31MAIN-932 OLD US 70		Four-Segment L...	Order par	10	✓	—	✓
FE01	MAIN WHSE A...	✓	Active	None	Storage			31MAIN-932 OLD US 70		Four-Segment L...	Order par	10	✓	—	✓
FF01	MAIN WHSE A...	✓	Active	None	Storage			31MAIN-932 OLD US 70		Four-Segment L...	Order par	10	✓	—	✓
FG01	MAIN WHSE A...	✓	Active	None	Storage			31MAIN-932 OLD US 70		Four-Segment L...	Order par	10	✓	—	✓
FH01	MAIN WHSE A...	✓	Active	None	Storage			31MAIN-932 OLD US 70		Four-Segment L...	Order par	10	✓	—	✓
FI01	MAIN WHSE A...	✓	Active	None	Storage			31MAIN-932 OLD US 70		Four-Segment L...	Order par	10	✓	—	✓
GA01	MAIN FREEZE...	✓	Active	None	Storage			31MAIN-932 OLD US 70		Four-Segment L...	Order par	10	✓	—	✓
GB01	MAIN FREEZE...	✓	Active	None	Storage			31MAIN-932 OLD US 70		Four-Segment L...	Order par	10	✓	—	✓
GC01	MAIN FREEZE...	✓	Active	None	Storage			31MAIN-932 OLD US 70		Four-Segment L...	Order par	10	✓	—	✓

21. Click on Actions and select Add.

NCFS

Manage Item Subinventories ? Done

Search

Subinventory Equals Inventory Planning Method Equals

Item Description Starts with

Search Reset Add Fields Reorder

Search Results

21

Manage Item Locators

Item Description	Inventory Planning Method	Additional Information
DRESSING, TRANSPARENT, 4" X 4.75", 50/BOX	Not planned	
BANDAGE, SELF-ADHERENT WRAP, 3", COBAN OR EQUIV	Not planned	
TAPE, SURGICAL, PAPER, 1" X 10 YD	Not planned	
FE01 3002644 TAPE, SURGICAL, CLOTH, 1" X 10 YD	Not planned	
FE01 3002645 TAPE, SURGICAL, CLOTH, 2" X 10 YD	Not planned	
FE01 3003204 BAND-AID, 1", OR EQUIV, 50/BOX	Not planned	
FE01 3003268 SUTURE REMOVAL KIT	Not planned	
FE01 3000334 TUBE, TRACHEOSTOMY, 6 CFS	Not planned	
FE01 3000336 TUBING, OXYGEN, 7 FT	Not planned	
FE01 3009422 CUSHION EAR,NASAL CANNULA	Not planned	

22. The Add Item to Subinventory window will appear.

23. The Subinventory will default with selection.

24. Enter the Item number in the Item field.

25. The Item Description will populate.



26. Click the Save and Close button.

Add Item to Subinventory 22

23 * Subinventory FE01

24 * Item 3000015

25 Item Description BANDAGE, ELASTIC WRAP, 6" X 5 YDS, ACE OR EQUIV

* Inventory Planning Method Not planned

Minimum Quantity EACH

Maximum Quantity EACH

Fixed Lot Multiple

Minimum Order Quantity EACH

Maximum Order Quantity EACH

Lead Times in Days

Preprocessing

Processing

Postprocessing

Sourcing

Type

Organization

Subinventory

PAR Settings

Replenishment Count Type

PAR Level

PAR Maximum Quantity

PAR Level UOM

Count Tolerance Percentage

26 Save and Create Another Save and Close Cancel

27. The Item will now show associated with to the Subinventory selected.

28. Click the Done button.

NCFS

Manage Item Subinventories

Search

Search Results

Subinventory	Item	Item Description	Inventory Planning Method	Additional Information
FE01	3000015	BANDAGE, ELASTIC WRAP, 6" X 5 YDS, ACE OR EQUIV	Not planned	27
FE01	3002644	TAPE, SURGICAL, CLOTH, 1" X 10 YD	Not planned	
FE01	3002645	TAPE, SURGICAL, CLOTH, 2" X 10 YD	Not planned	
FE01	3003204	BAND-AID, 1", OR EQUIV, 50/BOX	Not planned	
FE01	3003268	SUTURE REMOVAL KIT	Not planned	
FE01	3000013	BANDAGE, ELASTIC WRAP, 3" X 5 YDS, ACE OR EQUIV	Not planned	
FE01	3000014	BANDAGE, ELASTIC WRAP, 4" X 5 YDS, ACE OR EQUIV	Not planned	
FE01	3000018	BAND-AID, 2", OR EQUIV, 50/BOX	Not planned	
FE01	3000122	GAUZE, NON-STERILE, 2" X 2", 200/PACK	Not planned	
FE01	3000124	GAUZE, NON-STERILE, 3" X 3", 200/PACK	Not planned	

3000015 -- FE01 : Item Subinventory Details

Item 3000015

Item Description BANDAGE, ELASTIC WRAP, 6" X 5 YDS, ACE OR EQUIV

Inventory Planning Method Not planned

Minimum Quantity

Maximum Quantity

Fixed Lot Multiple

Minimum Order Quantity

Maximum Order Quantity

Lead Times in Days

Preprocessing

Processing

Postprocessing

Sourcing

Type

Organization

Subinventory

PAR Settings

Replenishment Count Type

PAR Level

PAR Maximum Quantity

PAR Level UOM

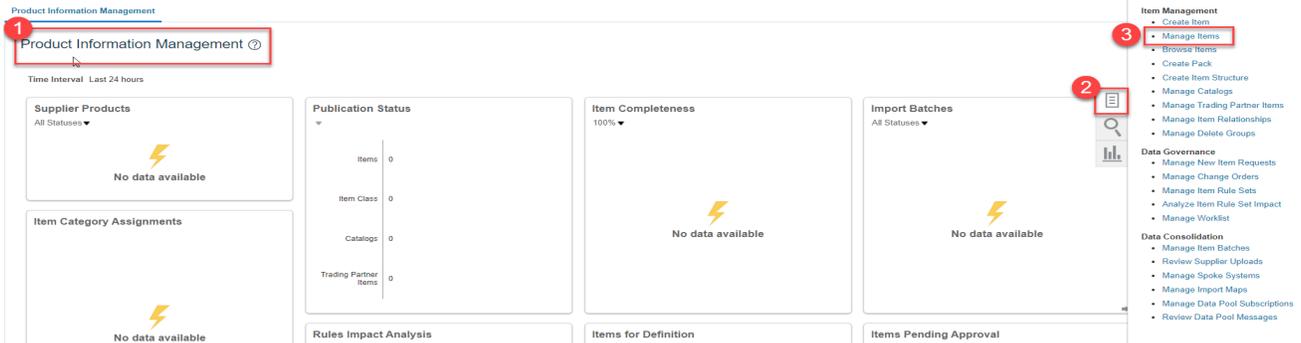
Count Tolerance Percentage

28 Done

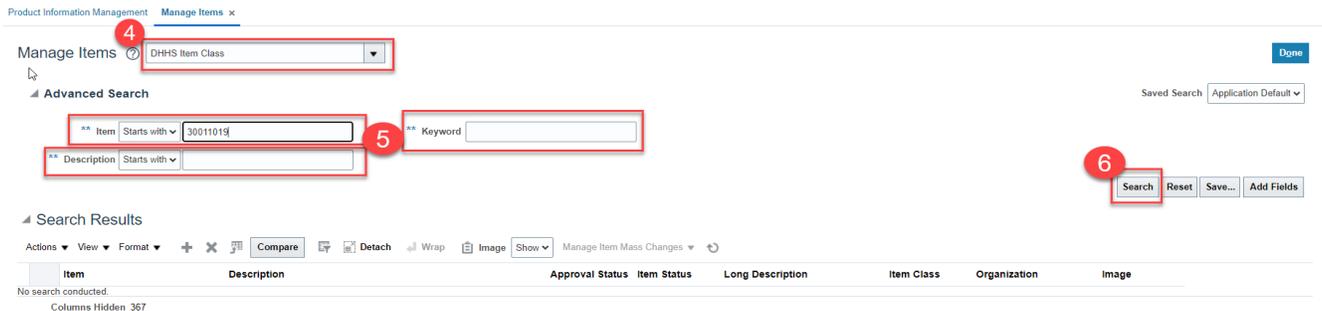


Associate Existing Items to Additional DHHS Inventory Organization(s)

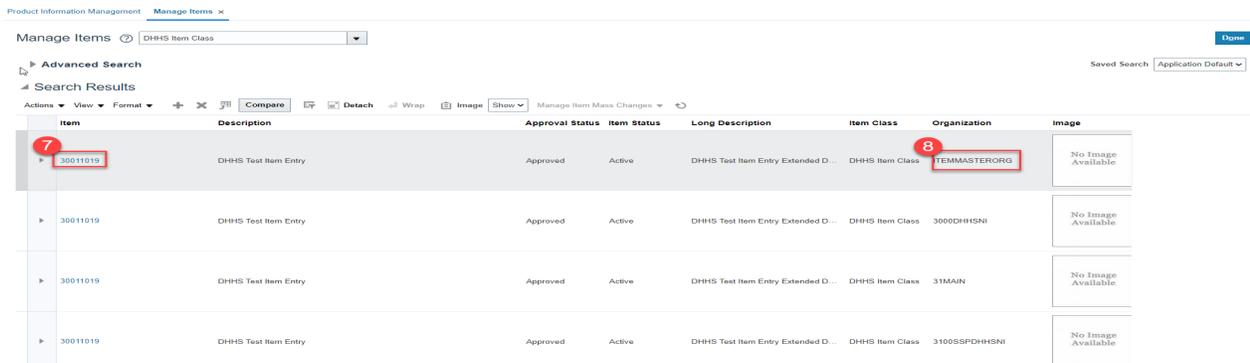
1. Navigate to **Product Information Management** tab.
2. Click the **Task Menu Icon**.
3. Select **Manage items** under **Item Management**.



4. Select the **DHHS Item Class**.
5. Enter **Item Number**, **Description** or **Keyword** to search Item for updating.
6. Click the **Search Button**.



7. The DHHS item will populate and show a list of associated Organizations.
8. Click the **Item** number for the **ITEMMASTERORG** organization.



9. Click the **Associations Tab**.

10. Click the **Select and Add** Icon or Click **Actions** and **Select and Add**.

Item: 30011019 (ITEMMASTERORG) x

Edit Item: 30011019 (ITEMMASTERORG) ⓘ *

Item: 30011019
 * Description: DHHS Test Item Entry
 Item Class: DHHS Item Class
 Approval Status: Approved
 Completeness Score:
 Created By: F00815116

Item Status: Active
 Lifecycle Phase: Production
 User Item Type: Purchased Item
 Pack Type:
 Revision: 0
 Creation Date: 9/27/23 1:31 PM

Overview Specifications Structures Attachments **Associations** Relationships Categories Quality

Organizations Supplier Organizations

Actions View Format **Select and Add** Reassign Freeze Detach Wrap

Organization Name	Item Status	* Primary Unit of Measure	Tracking Unit of Measure	Pricing	Secondary Unit of Measure	Defaulting Control	Positive Deviation Factor	Negative Deviation Factor	Approval Status	Change Order: Line	Change Line Status
INVENTORY ITEM MASTER	Active	EACH	Primary	Primary	-		0	0	Approved		
3000DHHSNI 3000-DHHS-NON-INVENTORY	Active	EACH	Primary	Primary	-		0	0	Approved		
3100SSPDHHSNI 3100 DHHS SSP NON-INVENTORY	Active	EACH	Primary	Primary	-		0	0	Approved		
31MAIN BLACK MOUNTAIN MAIN	Active	EACH	Primary	Primary	-		0	0	Approved		

11. Select the DHHS Organization and corresponding DHHS SSP Non-Inventory Organization to associate the existing item too.

12. Click **Apply** and then **Done**.

Select and Add: Organizations x

Search Organization 38%

Organization	Organization Name
3800DHHSNI	3800-DHHS-NON-INVENTORY
3800SSPDHHSNI	3800 DHHS SSP NON-INVENTORY
38CENT	CHERRY CENTRAL WHSE
38FOOD	CHERRY FOOD WHSE
38MAIN	CHERRY MAIN WHSE

Templates :

Available List Selected List

Apply Done Cancel

13. Click **Save**.

14. The new DHHS Organization and SSP Non-Inventory Organization Association is complete.

Item: 30011019 (ITEMMASTERORG) x

Edit Item: 30011019 (ITEMMASTERORG) ⓘ *

Item 30011019

Description: DHHS Test Item Entry

Item Class: DHHS Item Class

Approval Status: Approved

Completeness Score: None

Created By: P00015116

Item Status: Active

Lifecycle Phase: Production

User Item Type: Purchased Item

Pack Type: [Dropdown]

Revision: 0

Creation Date: 9/27/23 1:31 PM

Overview Specifications Structures Attachments **Associations** Relationships Categories Quality

Organizations Supplier Organizations

Organization	Organization Name	Item Status	* Primary Unit of Measure	Tracking Unit of Measure	Pricing	Secondary Unit of Measure	Defaulting Control	Positive Deviation Factor	Negative Deviation Factor	Approval Status	Change Order: Line	Change Line Status
300MAIN	CHERRY MAIN WHSE	Active	EACH	Primary	Primary	-	-	0	0	Approved	-	-
3800SSPDHHSNI	3800 DHHS SSP NON-INVENTORY	Active	EACH	Primary	Primary	-	-	0	0	Approved	-	-
ITEMMASTERO	INVENTORY ITEM MASTER	Active	EACH	Primary	Primary	-	-	0	0	Approved	-	-
3000DHHSNI	3000-DHHS-NON-INVENTORY	Active	EACH	Primary	Primary	-	-	0	0	Approved	-	-
3100SSPDHHSNI	3100 DHHS SSP NON-INVENTORY	Active	EACH	Primary	Primary	-	-	0	0	Approved	-	-

Associate DHHS items to an Organization when the Replenishment Source is an Organization (Warehouse)

In some cases, your DHHS warehouse(s) may order inventory items from another DHHS warehouse. The Source Replenishment Type will need to be updated to Organization and an Organization will need to be selected. Follow the below steps to set up this relationship.

Follow steps 1-14 for associating an item to an organization.

1. Click on **Specifications** and then **Planning**.
2. Set **Inventory Planning Method** to **Min-Max Planning**.
3. Enter **Minimum** and **Maximum** quantities.
4. Enter **Maximum Order Quantity**.
5. Under **Source** enter **Replenishment Type** as **Organization**.
6. Under **Organization** field select the **Source Organization** from the drop down.
7. Under **Order Modifiers**, enter “1” as the **Fixed Lot Size Multiplier**.



8. Click Save.

The screenshot shows the SAP 'Edit Item' screen for item 30011019 (39MAIN). The interface includes a top navigation bar with 'Save' and 'Cancel' buttons (callout 9). A left sidebar contains tabs for 'Specifications', 'Structures', 'Attachments', 'Associations', 'Relationships', 'Categories', and 'Quality' (callout 2). The main content area is divided into several sections:

- Item Organization: Planning** (callout 2): Includes 'General Planning' with 'Inventory Planning Method' set to 'Min-max planning' (callout 3) and 'Make or Buy' set to 'Buy'.
- Min-Max Quantity** (callout 2): Includes 'Minimum' (1, callout 4) and 'Maximum' (10, callout 4) input fields.
- Cost**: Includes 'Order' and 'Carrying Percentage' fields.
- Safety Stock**: Includes 'Safety Stock Planning Method' set to 'Not Planned'.
- Order Modifiers** (callout 2): Includes 'Replenishment Type' set to 'Organization' (callout 6), 'Organization' set to 'CRH MAIN WHSE', and a 'Subinventory' dropdown menu showing 'CRH MAIN WHSE' (39MAIN) selected (callout 7).
- Order Quantity**: Includes 'Minimum' and 'Maximum' (10, callout 5) input fields.
- Fixed Lot Size Multiplier** (callout 8): Set to 1.

DHHS Min/Max Value (Planning) and Updating Other Attributes

Note: Min/Max Value (Planning) is not required for 3000DHHSNI and any of the DHHS SSP Non-Inventory Organizations***

1. Navigate to the **Product Management** Tab.
2. Select **Product Information Management**.

The screenshot shows the SAP dashboard with a greeting: 'Good afternoon, Training Super User 1!'. The top navigation bar includes 'Receivables', 'Supply Chain Planning', 'Product Management' (callout 1), 'Payables', and 'General Account'. Below the navigation bar, the 'QUICK ACTIONS' section is visible. In the 'APPS' section, the 'Product Information Management' icon (callout 2) is highlighted with a red box.



3. Click on the **Tasks Icon** and Select **Manage Items**.

Product Information Management

Product Information Management

Time Interval Last 24 hours

Supplier Products
All Statuses

No data available

Item Category Assignments

Publication Status

Items 0

Item Class 0

Catalogs 0

Trading Partner Items 0

Item Completeness
100%

No data available

Import Batches
All Statuses

No data available

- Item Management
 - Create Item
 - Manage Items**
 - Browse Items
 - Create Pack
 - Create Item Structure
 - Manage Catalogs
 - Manage Trading Partner Items
 - Manage Item Relationships
 - Manage Delete Groups
- Data Governance
 - Manage New Item Requests
 - Manage Change Orders
 - Manage Item Rule Sets
 - Analyze Item Rule Set Impact
 - Manage Worklist
- Data Consolidation
 - Manage Item Batches
 - Review Supplier Uploads
 - Manage Spoke Systems
 - Manage Import Maps
 - Manage Data Pool Subscriptions
 - Review Data Pool Messages

4. Under the **Advanced Search**, enter **Item, Description, or Keyword**.

5. Click **Search**.

Product Information Management Manage Items x

Manage Items DHHS Item Class Done

Advanced Search

Item Starts with 30011019 Keyword

Description Starts with

Search Reset Save... Add Fields

Saved Search Application Default

Search Results

Actions View Format Compare Detach Wrap Image Show Manage Item Mass Changes

Item	Description	Approval Status	Item Status	Long Description	Item Class	Organization	Image
No search conducted.							
Columns Hidden 367							

6. Click on the **Item** for the DHHS Organization to update Min/Max Value.

Product Information Management **Manage Items** x

Manage Items Done

Advanced Search Saved Search Application Default

Search Results

Actions View Format + X Manage Item Mass Changes

Item	Description	Approval Status	Item Status	Long Description	Item Class	Organization	Image
▶ 30011019	DHHS Test Item Entry	Approved	Active	DHHS Test Item Entry Extended D...	DHHS Item Class	ITEMMASTERORG	No Image Available
▶ 30011019	DHHS Test Item Entry	Approved	Active	DHHS Test Item Entry Extended D...	DHHS Item Class	3000DHHSNI	No Image Available
▶ 30011019	DHHS Test Item Entry	Approved	Active	DHHS Test Item Entry Extended D...	DHHS Item Class	31MAIN	No Image Available
▶ 30011019	DHHS Test Item Entry	Approved	Active	DHHS Test Item Entry Extended D...	DHHS Item Class	38MAIN	No Image Available

7. Click **Specifications** and then Click **Planning** under **Item Organization**.

Edit Item: 30011019 (38MAIN) Completed by: [User] Created by: [User] Created Date: [Date] Actions Save Cancel

Overview **Specifications** Structures Attachments Associations Relationships Categories Quality

Item Organization: Planning

General Planning

Inventory Planning Method Planner

Make or Buy Subcontracting Component

Min-Max Quantity

Minimum Order Quantity

Maximum Minimum

Maximum Maximum

Cost

Order Source

Carrying Percentage Replenishment Type

Organization

Subinventory

Safety Stock

Safety Stock Planning Method Order Modifiers

Demand Period Fixed Order Quantity

Days of Cover Fixed Days Supply

Fixed Lot Size Multiplier

Supplier Managed

Release Authorization Required Consigned

Automatically Expire ASN

8. Under **General Planning** enter the **Inventory Planning Method** as “Min-max planning”.

9. Under **Min-Max Quantity** enter the **Minimum** and **Maximum** quantities.

10. Under **Order Quantity** enter the **Maximum** quantity.

11. Under **Source** enter the **Replenishment Type** as “Supplier”.

12. Under **Order Modifiers** enter the **Fixed Lot Size Multiplier** as “1”.



13. Click Save.

Edit Item: 30011019 (38MAIN) ⊙ ★ Completions: None Created By: F02515110 Created Date: 9/28/23 2:00 PM Actions Save Cancel

Overview **Specifications** Structures Attachments Associations Relationships Categories Quality

Item
 Transactional Attributes
 Additional Attributes
 DHHS Additional Attributes
Item Revision
 Additional Attributes
Item Organization
 Manufacturing
 Service
 Inventory
 Physical Attributes
 Sales and Order Management
 Planning
 Purchasing

Item Organization: Planning

General Planning

8 Inventory Planning Method

Make or Buy

Min-Max Quantity

9 Minimum
 * Maximum

Cost

Order

Carrying Percentage

Safety Stock

Safety Stock Planning Method

Demand Period

Days of Cover

Supplier Managed

Release Authorization Required

Automatically Expire ASN

Planner

Subcontracting Component

Order Quantity

10 Minimum
 Maximum

Source

11 Replenishment Type

Organization

Subinventory

Order Modifiers

Fixed Order Quantity

Fixed Days Supply

12 Fixed Lot Size Multiplier

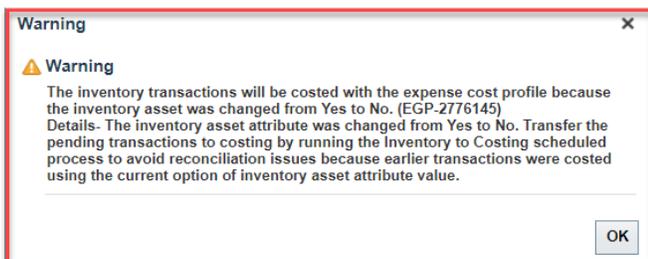
Consigned

Updating Attributes for DHHS Non-Inventory Organizations

Note: This process is only for 3000DHHSNI and any of the DHHS SSP Non-Inventory Organizations***

*****The majority of Attributes will default per the DHHS Item Template, below are the only Attributes that MUST be updated*****

1. Click on the **Specifications** tab for the selected Item and Non-Inventory Organization.
2. Click on the **Manufacturing** tab.
3. Under the **Costing** section update the **Inventory Asset Value** to “NO”.
4. A **Warning** Pop-up window will appear, Click **OK**.



5. Click **Save**.

Item Organization: Manufacturing

Item Structure

Structure Item Type: Standard

Create Configured Item: [Dropdown]

Configurator Model Type: Standard

Effectivity Control: Date

Match Configuration: [Dropdown]

Costing

Costing Enabled: Yes

Include in Rollup: Yes

Build in WIP: No

Materials

Supply Type: Assembly pull

Supply Locator: [Text]

Base Model: [Text]

Autocreated Configuration: No

Pick Components: No

Assemble to Order: No

Standard Lot Size: [Text]

Inventory Asset Value: No

Contract Manufacturing: No

Supply Subinventory: [Text]

5. Click on the **Inventory** tab.

6. Under **Material Control** update the **Stocked** field to “NO”.

7. Click **Save**.

Item Organization: Inventory

Material Control

Inventory Item: Yes

Stocked: No

Transaction Enabled: No

Reservable: Yes

Lot

Control: No lot control

Starting Prefix: [Text]

Starting Number: [Text]

Maturity Days: [Text]

Hold Days: [Text]

Check Material Shortage: No

Revision Control: No

Bulk Picked: No

Lot Expiration

Control: No shelf life control

Shelf Life Days: 0

Retest Interval: [Text]

Expiration Action: [Dropdown]

Expiration Action Interval: [Text]

Current List of DHHS Organizations in NCFS

Organization Code
3000DHHSNI(ASSIGNED TO ALL DHHS ITEMS)
3100DHHSNI
3100SSPDHHSNI
31MAIN
3200DHHSNI
3200SSPDHHSNI
32MAIN
3300DHHSNI
3400DHHSNI
3400SSPDHHSNI
34MAIN
3700DHHSNI
3700SSPDHHSNI
37CENT
37FOOD
37MAIN
37POST
3800DHHSNI
3800SSPDHHSNI
38CENT
38FOOD
38MAIN
3900DHHSNI
3900ENGSSPDHHSNI
3900SSPDHHSNI
39CENT
39ENGR
39FOOD
39MAIN

Wrap-Up

The above steps detail item creation and maintenance in NCFS.

Additional Resources

Virtual Instructor-Led Training (vILT)

- INV 101: Inventory Agency Manager (ILT)
- INV 102: Inventory Cost Accounting (ILT)
- INV 109: Inventory Item Maintenance
- INV-08: QRG <https://www.osc.nc.gov/training/ncfs-help-documents>
- INV-04: QRG <https://www.osc.nc.gov/training/ncfs-help-documents>