# DPI Inventory Item Creation/Maintenance Job Aid



# **QUICK REFERENCE GUIDE INV-42**

#### Purpose

The purpose of this job aid is to provide step-by-step explanation of how to Create and Manage new items for 08BOOKS and 08OTHER Organizations, Create and Manage new items for 08MODBK and LEA Organizations, Associate items to the 0800DPINI Non-Inventory Organization, Associate DPI items to Inventory Organizations, Associate existing items to additional DPI Inventory Organizations, Associate DPI items to a organization when a Replenishment Source Organization is an 08MODBK Organization, update MIN/MAX Value (Planning) in the North Carolina Financial System (NCFS).

This Job Aid 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: <u>https://www.osc.nc.gov/training/ncfs-help-documents</u>

# 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. Agencies will be responsible for adding and maintaining items in the item master. DPI has a separate item class within the item master titled **DPI ITEM CLASS**.

# Create and Manage New Items for 08BOOKS and 08OTHER Organizations

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

- 1. Navigate to the NCFS environment with this link: <u>https://osc.nc.gov/ncfslogin.</u>
- 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.



INV



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

		습 ☆	₽ ₽ T
Product Information Management			
Product Information Management ⑦			
Time Interval Last 24 hours		(৩) ল	5
Supplier Products	Publication Status	Item Completeness	
All Statuses 🖝	The Publication Status	100% 🖝	0
_			Item Management
7	items 0		Create Item
No data available			- Managa Itama
	Item Class 0		Manage items
Import Batches		<b>*</b>	<ul> <li>Browse Items</li> </ul>
All Statuses 🕶	Catalogs 0	No data available	Create Pack
			Create Item Structure
	Trading Partner Items 0		- Managa Catalogs
			<ul> <li>Manage Catalogs</li> </ul>
			Manage Trading Partner Items

- 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 (DPI Item Class).
  - v. Template defaults to (DHPI Item Template) in Selected List.
- 7. Click **OK.**

Create Item	×
* Organization	ITEMMASTERORG 🗸
	Create New     Create from Copy
* Number of Items	1
* Item Class	DPI Item Class
Templates Available List Root Item Template	6 Selected List DPI Item Template
	« 7 OK Cancel

- 8. New Item number must be entered for DPI.
- 9. Enter Item Description (80 Character length).
- 10. Enter Item Long Description if needed (2000 Character length).
- 11. Select Primary Unit of Measure.



Product Information Management Create Item ×								
Create Item ⑦						📭 Social	Actions •	Save <b>T</b> <u>C</u> ancel
No itr	ems to display	9 Description Item Class Approval Status Completeness Score	12345678910 DPI TEST ITEM CREATION DPI Item Class Approved		Item Status Lifecycle Phase User Item Type Pack Type	Active  Production Purchased Item	]	<b>v</b>
None	+	Created By	P00815116		Creation Date	10/2/23 9:40 AM		
Overview Specifications Structures Attachm Formatted Description	vents Associations Relationships Categories	Quality 10	n DPI TEST ITEM CREATION EXTENDED D	DESCRIPTION	Å			
Mandatory Attributes     Primary Unit of Measure EACH     Unit of Measure ⑦	•							
* Primary Unit of Measure	EACH v			Defaulting Control	$\checkmark$			
Tracking Unit of Measure	Primary ~		Pos	itive Deviation Factor	0			
Pricing Conversions	Primary V Both V		Nega	tive Deviation Factor	0			
Secondary Unit of Measure	•							

- 12. Click on Specifications.
- 13. Click on **DPI Additional Attributes.**
- 14. Select **Publication Type** from drop down menu (4 choices).

ETXT	
INST	
RSCE	
TEXT	
Search	

- 15. Enter Publisher, Contract Price, and Selling Price.
- 16. Select **Subject Code** from drop down menu.
- 17. Select Category Code from drop down menu.
- 18. Select Grade Code from drop down menu.
- 19. Enter **On/Off Adoption** (4-digit number first 2 digits beginning adoption year/ last 2 digits ending adoption year). Example: 2227
- 20. Select **Price Option** as **"S"** for Selling Price.



#### QRG INV-42 – DPI Inventory Item Creation/Maintenance Job Aid

Create Item ⑦	N				Cocial Actions	s ▼ Save ▼ Cancel
12 Decision Sectifications S	No items to display None +	* Item * Description Item Class Approval Status Completeness Score Created By	12345678910 DPI TEST ITEM CREATION DPI Item Class Approved P00015116	Item Stat Lifecycle Pha User Item Ty Pack Ty Revisi Creation De	IS Active v se Production v Purchased Item Pe v n 0 102/23 9.40 AM	v
Item     Transactional Attributes     Additional Attributes     DPI Additional Attributes     DPI Additional Attributes     Item Revision     Additional Attributes     Item Organization     Manufacturing     Serice     Inventory     Physical Attributes     Sales and Order Management     Physical Attributes     Sales and Order Manageme	Item: DPI Additiona	Attributes cation Type TEXT Publisher SAVVAS ntract Price 130.00 celling Price 131.00 celling Price 5620-PRE-CALCULUS cegory Code 5600-MATHEMATICS		18     Grade Code     0956-HICH St       Location		cs v
22. Upda Create Item (2) Corrector: Specifications Strue Corrector: Specifications Strue Item Transactional Attributes DPI Addisonal Attributes DPI Addisonal Attributes DPI Addisonal Attributes I Item Revision Addisonal Attributes I Item Organization Item Organization	ter the Check	Material Shortage fiel	eld to "YES".	Check Material Shortage Durk Picked Durk Picked No v	Actions	

Item Revision	Inventory Item	Yes 🗸	Check Material Shortage	Yes ~	
Additional Attributes	Stocked	Yes 🗸	Revision Control	I No V	
✓ Item Organization	Transaction Enabled	Yes 🗸	Bulk Picked	No V	
Manufacturing	Reservable	Yes 🗸			
1 Service Inventory Physical Attributes	Lot ②		Lot Expiration ⑦		
Sales and Order Management Planning	Control	No lot control 🗸	Control	No shelf life control 🛛 🗸	
Purchasing	Starting Prefix		Shelf Life Days	0	
	Starting Number		Retest Interval	L	
	Maturity Days		Expiration Action		w
	Hold Days		Expiration Action Interval	1	

- 23. Click on Purchasing.
- 24. Update the Use Approved Supplier field to "YES".



#### QRG INV-42 – DPI Inventory Item Creation/Maintenance Job Aid

Create Item ⑦					Restative II 😨 Social	Actions •	Save <b>T</b> <u>C</u> ancel
Overview Specifications Stru	La ctures Attachments Associations Relations	ships Categories Quality					
Transactional Attributes Additional Attributes	Item Organization: Purchasing						
DPI Additional Attributes	Purchased	Yes		Purchasable Allow Purchasable Document	Yesv		
Additional Attributes	Use Approved Supplier Negotiation Required	Yes		Description Update Taxable	Yes V No V		
Manufacturing	Input Tax Classification Code		×	Default Buyer		-	
Service Inventory	Unit of Issue		•	Receipt Close Tolerance Percentage			
Physical Attributes Sales and Order Management	Hezard Class		-	GA HUMBER			
Purchasing	Asset Category						
	Pricing						
	List Price     Price Tolerance Percentage			Rounding Factor			
	Market Price						
	Outside Processing Item			Invoice Matching ②			
	Outside Processing Service	No 🕶		Match Approval Level Invoice Match Option	~		

#### 25. Click on Categories.

26. Click the Actions drop down and select Add Row.

Product Information Management Create Item x		
Create Item ⑦		Cancel
No items to display None alle	* Item 12345678910 * Description DPI TEST ITEM CREATION * Item Class DPI hem Class Approval Status Appreval Completeness Score Created By *00815116	Item Status Active  Lifecycle Phase Production  User Item Type Purchased Item  Pack Type  Revision 0 Creation Date 100/223 9.40 AM
25     Categorie Guiden     Controlled At     Category     Catego	Iby Associations All  Hierarchy Description	Start Date End Date midyy (b) midyy (b)

- 27. In the Catalog field, select NC Catalog.
- 28. In the **Category** field, select the appropriate **UNSPSC Category Code** (Reference existing list of like items for UNSPSC Category Code).
- 29. Category Code and Description will populate upon Category selection.
- 30. Click **Save** button.



Product Information Management Create Item ×			
Create Item ③			V_Social Actions - Cancel
	* Item	12345678910	Item Status Astin as
No items to display	* Description	DPI TEST ITEM CREATION	Lifecycle Phase Production V
	Item Class	DPI Item Class	User Item Type Purchased Item 🗸
	Approval Status	Approved	Pack Type 🗸
	Completeness Score	Pagester	Revision 0
None 🕂	Created By	00815116	Creation Date 10/2/23 9:40 AM
Overview Specifications Structures Attachments Associations Relationships Categories C	Quality		
Actions 🕶 View 💌 Format 👻 🛨 💥 🛱 🐺 🐺 Freeze 🚽 Wrap Catalogs All	✓ Associations All	×	
Catalog Controlled At Category Category Code	Hierarchy Des	cription 30	Start Date End Date
Master Level 28 551015-Printed pul  551015 29	5510	015-Printed publications	10/2/23 🔯 m/d/yy 📬

# 

If the new Item Creation requires a Intra/Inter Class UOM Conversion, pause after Step 30 above and email the new Item number, Unit of Purchase, Unit of Measure (SKU) and Conversion Factor to <u>NCFS@osc.nc.gov</u> for processing. Once OSC processes the request, the agency will be notified, and the New Item Creation steps can be continued below.

# Create and Manage new items for 08MODBK and LEA Organizations

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

- 1. Follow steps 1-11 for Creating a DPI item.
- 2. Select Specifications and then DPI Additional Attributes.
- 3. Select Publication Type from drop down menu (4 choices).

ETXT
INST
RSCE
TEXT
Search

- 4. Enter Publisher.
- 5. Enter **Contract Price** and **Selling Price** as **"0(zero)"** for both.

NORTH CAROLINA OFFICE OF THE STATE CONTROLLER



- 6. Select **Subject Code** from drop down menu.
- 7. Select Category Code from drop down menu.
- 8. Select Grade Code from drop down menu.
- 9. Enter **On/Off Adoption** (4-digit number first 2 digits beginning adoption year/ last 2 digits ending adoption year). Example: 1722
- 10. Select **Price Option** as **"A"** for Average Price.

Create Item ⑦				Social Actions V Save V Cance
	* Item	JBR12345678910		Press Autor an
No items to display	* Description	DPI Modified Book Item Entry	Lifecycle	Production V
	Item Class	DPI Item Class	User Ite	m Type Purchased Item 🗸
	Approval Status	Approved	Pa	ck Type 🗸 🗸
	Completeness Score		R	evision 0
None 📲	Created By	P00815116	Creati	on Date 10/3/23 8:49 AM
Additional Attributes Additional Attributes DPI Additional Attributes Item: DPI Additional Attributes Item Revision				
Additional Attributes 3 Publication Type TEXT	•		Grade Code 0631-SI	KTH GRADE HEALTHFUL LIVING EDUCATION
Item Organization     Publisher MCGRAW-H	ILL		Location	
Manufacturing Service 5 Contract Price	0		On/Off Adoption 1722	
Inventory Physical Attributes Selling Price	0		Seasonal Item	•
Sales and Order Management Planning G Subject Code 3110-HEALT	HFUL LIVING EDUCATION	•	10 Price Option A	•
Purchasing Category Code 3000-HEALT	HFUL LIVING EDUCATION	•		

- 11. Click on Inventory.
- 12. Update the Check Material Shortage field to "YES".

Create Item ⑦			Revision 0 To Social Actions V Save V Cancel
Overview Specifications Stru	ctures Attachments Associations Relationships Categories Quality		
✓ Item Transactional Attributes Additional Attributes	Item Organization: Inventory ⑦		
DPI Additional Attributes	Material Control	12 Check Material Shortage	Yesv
Additional Attributes	Stocked Ves 🗸	Revision Control Bulk Picked	No v
Manufacturing Service Inventory 11 Physical Attributes	Reservable Yes v	Lot Expiration ⑦	
Sales and Order Management Planning Purchasing	Control No lot control 🗸	Control Shelf Life Davs	No shelf life control v
	Starting Number	Retest Interval	•
	Maturity Days	Expiration Action	v.
	Hold Days	Expiration Action Interval	

13. Click on Purchasing.



14. Update the Use Approved Supplier field to "YES".

Create Item ()			Revision 0 RoSodal Action	s ▼ Save ▼ Cancel
Overview         Specifications         Structures         Attachments         Associations         Relationships         Categories           Item         Item         Item Organization: Purchasing         Additional Attributes         Additional Attributes         Item Organization: Purchasing         Item Organizatio: Purchasing         Item Organization: Purchasing	a Quality			
DPI Additional Attributes Purchased Ves Item Revision Additional Attributes Purchased Ves	•	Purchasabe Allow Purchasing Document Description Update Taxable Default Buyer Receipt Close Tolerance Percentage UN Number	Yes v Yes v No v	
Purchasing 13 Pricing List Price Price Tolerance Percentage Market Price Outside Processing Item Outside Processing Service No ~		Rounding Factor	~	

15. Next, Click on Categories.

#### 16. Click the Actions drop down and select Add Row.

duct Information Management Create Item ×							
Create Item (2)				Social	Actions •	Save 🔻 🧕	ancel
No items to display	* item J8 * Description D Item Class D/	3R12345678910 PI Modified Book Item Entry PI Item Class	item Status Lifecycle Phase User item Type	Active V Production V Purchased Item		~	
None 🚽	Approval Status Approval Statu	sproved D0815116	Pack Type Revision Creation Date	0 10/3/23 8:49 AM			
Overview Specifications Structures Attachments Associations Relationships Actions ▼ View ▼ Format ▼ ★ ★ 第 IF ■ Freeze ↓ Wrop	Categories Quality Catalogs All   All  All	*					
Add Row Controlled At Category Categories	ory Code Hierarchy Descr	ription		S	tart Date	End Date	•
Export to Excel							

- 17. In the Catalog field, select NC Catalog.
- 18. In the **Category** field, select the appropriate **UNSPSC Category Code** (Reference existing list of like items for UNSPSC Category Code).
- 19. Category Code and Description will populate upon Category selection.
- 20. Click **Save** button.



Create Item @		Social Actions Ca
No items to display None 👍	* Item JBR12345678910  * Description Item Class DPI Item Class Approved Completeness Score Created By P00815116	Y Lifecycle Phase Production User Item Type Parchased Item Pack Type Revision 0 Creation Date 10/3/23 8.49 AM
Overview     Specifications     Structures     Attachments     Associations     Relationships     Citalog       Actions •     View •     Format •     +     *     Image: Trease     Wrap     C       Catalog     Controlled At     Category     Category     Category     Category     551015       7     NC Catalog     •     Master Level     18     551015     551015	tegories Quality talogs All V Associations All V 7 Cod Hierarchy Description 19 551015-Printed publications	Start Date End Date 10/3/23 🚱 m/d/yy 🕻

\*\*\*NOTE: Once the Modified Item is created in NCFS under the ITEMMASTERORG, Associate the item to 08MODBK and all LEA's and Update the below Attributes\*\*\*

- 21. Select **Specifications**, Select **Inventory** and update **Check Material Shortage** to **"NO"** for 08MODBK Organization.
- \*\*\*NOTE: For LEA's (08010M, etc..) the Check Material Shortage is "YES".

Check Material Shortage Yes	***			
Edit Item: JBR12345678910 (08MODBK) ③ *	Approval Status Approved Completeness Score Created By 700055115		Pack Type 🍙 Social 😝	Actions V Save V Cancel
None T			Creation Date 10/3/23 10:15 AM	
21 Overview Specifications Structures Attachments Associations Relation	nps Categories Quality			
Item Item Organization: Inventory ( Transactional Attributes				
Additional Attributes Material Control DPI Additional Attributes		21		
▲ Item Revision Inventory Item	Yes ¥	Check Material Shortage	No 🗸	
Additional Attributes Stocked	Yes 🗸	Revision Control	No 🛩	
▲ Item Organization Transaction Enabled	Yes 🗸	Bulk Picked	No 🗸	
Manufacturing Reservable	Yes 🗸			
Service 21 Inventory 21 Physical Attributes Lot ⑦		Lot Expiration (2)		
Sales and Order Management		Cantral	No shalf life control	
Purchasing		Control	ino snen me control V	
Starting Prefix		Shelf Life Days	0	

22. Select Sales and Order Management and update Internally Transferable to "NO" and Transfer Orders Enabled should update to "NO" for 08MODBK Organization.



***NOTE: For LEA's (08010M, etc) the Internally	<pre>Transferable is "YES"</pre>	and the Transfer
Orders Enabled is "YES"		

Internally	Transferable Yes 🗸	Transfer Orders	Enabled Yes 🗸	* * *		
Edit Item: JBR123456	78910 (08MODBK) ⑦ *				Peck Type Social Construction Serve 24	<u>Cancel</u>
Overview     Specifications     Structure       Item     Immediate Structure       Additional Attributes     DPI Additional Attributes       DPI Additional Attributes     Item Revision       Additional Attributes     Item Organization       Manufacturing     Berico       Inventory     Payacal Attributes       Sates and Order Management]     Planning       Purchasing	ctures Attachments Associations Relations Item Organization: Saless and O a Order Management (*) Customer Orders Customer Order Customer Orders Customer Order Customer Order	ips Catagories Quality cdor Management Yes None Rotate stock No No Yes		Transfer Orders Enabled Check ATP Returnable Financing Allowed Sales Product Type Back-to-Back Enabled Default Sales Order Source Type	No V None V Yas V No V	
	Fulfillment Electronic Format Shippable	v Yes v		Ship Model Complete Downloadable	No v	

- 23. See **Updating DPI Organization(s) MIN/MAX Value (Planning) section** for 08MODBK Min/Max Value updating.
- 24. Click Save.

\*\*\*Note: For LEA's (08010M, etc...) the Order Quantity Maximum is "0(zero)", Replenishment Type is "Organization" and the Organization is "DPI MODIFIED BK WHSE"

Order Quanti	ty		
	Minimum		
	Maximum	0	
Source			
	Replenishment Type	Organization 🗸	
	Organization	DPI MODIFIED BK WHSE	
	Subinventory	•	***



# Adding Item to a Sub-Inventory Location within a Warehouse

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

= <b>NCF5</b>		
G	ood morning, NATLYNN STEIN	
<b>&lt;</b> My	Enterprise Tools Others	-
QUIC	K ACTIONS APPS	
	Available Features Offerings New Features New Feature Updates	
An	alytics	
Cas	h 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.

					Ç.ª NS
Setup: Manufacturing and Supply Chain Materia	als Management 💌 ᇘ 🔊				Actions <b>*</b>
Functional Areas	Change Feature Opt In	Search Tasks			
* Financial Reporting Structures	Shared 🔽	Inventory Management View 👻 Format 👻 📰 Freeze 📰 Detach 🚽 Wirap Show All Tasks 🗸			
* Organization Structures	Shared	Task Help Scope	Predecessor Tasks	Notes Actions	
* Sume line	Shared	Manage ABC Classes	0	0 🔽	▲ E
Supplets	Shared	Manage ABC Classification Sets	0	0 💌	
" Facilities	°0 🔽	Manage ABC Assignment Groups	0	0 💌	
* Users and Security	Shared	Manage Interorganization Parameters	0	0 😎	
* Items	Shared 🔽	Manage Intersubinventory Parameters	0	0 💌	
Carriers and Transit Times		Manage Account Aliases	0	0 💌	
* Catalogs	Shared 🔽	Manage Inventory Transaction Reasons	0	0 💌	
Inventory Management		Manage Item Transaction Defaults	0	0	
Receiving	Shared	Manage Pick Slip Grouping Rules	0	0	
* Shipping	•	Manane Pickino Rules	0	n 🗨	*
Receipt Accounting	Shared 💌				
* Cost Accounting					

- 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.

≡ <b>NCFS</b>			$\hat{\Box}$	☆₽	La NS
Manage Item Transaction Defaults ⑦		Inventory Organization 31MAIN Change Organization	Save	Save and Cl	ose <u>C</u> ancel
Search Item 3000015 Item Description Starts with  Item Kneward	Default For v Subinventory				
Search Results				9	earch Reset
* Item Item Description	* Default A T * Subinventary Locator		_		* *

- 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.

	4						습 수 🏳 🛟	NS
Manage Item Tr	ansaction Defaults ②				Inventory Organization 31MAIN	Change Organization	Save Save and Close	Cancel
✓ Search							15	
Item	3000015 Q	Default Fo	r <b>v</b>					
Item Description	Starts with 🗸	Subinventor	У	•				
Item Keyword	2	Locato	r	•				
							Search	Reset
▲ Search Result	S							
Actions View V	+ X Edit Subinventory V	Change						
11		* Default	14					
item	item Description	For	bry Locator					
3000015	C BANDAGE, ELASTIC WRAP, 6" X 5 YDS, A.	Receiving 🗸	•					
	12	13 AA01	<u>^</u>					
		AB01						
		AC01						
		AD01						
		R401						
		BB01						
		BC01						
		BD01						
		CA01						
		Search						



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

Setup: Manafacturing and Supply Chain M	aterials Management 💌 📮 곗					Actions <b>*</b>
Functional Areas	Change Feature Opt In	Search Tasks				
* Initial Users	Shared 💌 📩	Inventory Management				
* Enterprise Profile	Shared	View 🔻 Format 👻 🦷 Freeze 🔛 Detach 🚽 Wrap Show	All Tasks 🗸			
* Legal Structures	Shared 😎	Task	Help Scope	Predecessor Tasks	Notes Actions	-
* Financial Reporting Structures	Shared 🔽	Manage Inventory Profile Options		0	0	<u> </u>
* Organization Structures	Shared 🔽	Manage Inventory Lookups		0	0	
* Customers		Manage Inventory Value Sets		0	0	
	Shared	Manage Inventory Descriptive Flexfields		0	0	
^ Suppliers	Shared	Manage Inventory Account Alias Key Flexfield		0	0 💌	
* Facilities	°¢ 🔽	Manage Inventory Locator Key Flexfield		0	0 💌	
* Users and Security	Shared 🔽	Manage Inventory Transaction Sources and Types		0	0 💌	
* Items	Shared 💌	Manage Material Statuses		0	0	
Carriers and Transit Times	•	Manage Subinventories and Locators 16		0	0 💌	
* Catalogs	Shared 🔽	Manage ABC Classes		0	0	
Inventory Management						
Receiving	Shared					

- 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.

Ма	nage Subinv	ventories 📎										17	nventory Organiza	tion 31MAIN Ch	ange Organization	D <u>o</u> ne
Sea	Search Subinventory Description Locator Control rch Results	Equals	) 	20	Si	ibinventory Type Eq	uals 🗸	•		18				18 Search Reset	Add Fields V	Reorder
Ac	subinventory	+ > 3	Manage Item Su Active	Material Status	Locator Control	Subinventory Type	Additional Information	End Date	Location	Default Loc Status	ator Locator Structure	Default Replenishment Count Type	Picking Order	Asset subinventory	Depreciable	Quar track
	FC01	MAIN WHSE A	0	Active	None	Storage	1		31MAIN-932 OLD US 70	)	. Four-Segment L	Order par	10	~	_	v *
	FD01	MAIN WHSE A	0	Active	None	Storage			31MAIN-932 OLD US 70	)	. Four-Segment L	Order par	10	~	_	~
10	FE01	MAIN WHSE A	٢	Active	None	Storage	1		31MAIN-932 OLD US 70	)	. Four-Segment L	Order par	10	~	-	~
	FF01	MAIN WHSE A	0	Active	None	Storage	2		31MAIN-932 OLD US 70	)	. Four-Segment L	Order par	10	~	-	~
	FG01	MAIN WHSE A	0	Active	None	Storage	1		31MAIN-932 OLD US 70	)	. Four-Segment L	Order par	10	~	_	~
	FH01	MAIN WHSE A	0	Active	None	Storage	1		31MAIN-932 OLD US 70	)	. Four-Segment L	Order par	10	~	_	~
	FI01	MAIN WHSE A	0	Active	None	Storage	1		31MAIN-932 OLD US 70	)	. Four-Segment L	Order par	10	~	-	~
	GA01	MAIN FREEZE	0	Active	None	Storage	1		31MAIN-932 OLD US 70	)	Four-Segment L	Order par	10	~	_	~
	GB01	MAIN FREEZE	0	Active	None	Storage	1		31MAIN-932 OLD US 70	)	. Four-Segment L	Order par	10	~	_	~
	GC01	MAIN FREEZE	0	Active	None	Storage	1		31MAIN-932 OLD US 70	)	Four-Segment L	Order par	10	~	_	<ul> <li>-</li> </ul>



21. Click on Actions and select Add.

	_					
				☆ ⊢	Ĉ3	NS
Manage Item S	Subinventori	is ⑦				D <u>o</u> ne
✓ Search						
Subinventor	y Equals	FE01 Inventory Planning Method Equals V V				
Item Description	n Starts with 🗸					
Search Results	s + / ×	卲 Manage Item Locators	Search Reset	Add Field	s <b>v</b> R	eorder
Add Edit	21	Item Description	Inventory Planning Method		Additiona	al on
Delete	-	DRESSING, TRANSPARENT, 4" X 4.75", 50/BOX	Not planne	d	R	-
Export to Excel		BANDAGE, SELF-ADHERENT WRAP, 3", COBAN OR EQUIV	Not planne	d	₽	
Manage Item Lo	cators	TAPE, SURGICAL, PAPER, 1° X 10 YD	Not planne	d	-	
FE01	3002644	TAPE, SURGICAL, CLOTH, 1" X 10 YD	Not planne	d	1	
FE01	3002645	TAPE, SURGICAL, CLOTH, 2" X 10 YD	Not planne	d	1	
FE01	3003204	BAND-AID, 1°, OR EQUIV, 50/BOX	Not planne	d	₽	
FE01	3003268	SUTURE REIMOVAL KIT	Not planne	d	1	
FE01	3000334	TUBE, TRACHEOSTOMY, 6 CFS	Not planne	d	1	
FE01	3000336	TUBING, OXYGEN, 7 FT	Not planne	d	Ę.	
FE01	3009422	CUSHION, EAR, NASAL CANNULA	Not planne	d	5	*

- 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.



#### QRG INV-42 – DPI Inventory Item Creation/Maintenance Job Aid

Add Item to Subinventory	22					
23 * Subinventory	FE01	v		Lead Times in Days		
24 * Item	3000015	्		Preprocessing		
25 Item Description	BANDAGE, ELASTIC WRA	AP, 6" X 5 YDS, ACE	E OR EQUIV	Processing		
* Inventory Planning Method	Not planned			Postprocessing		
Minimum Quantity		EAC	Ή	Sourcing		
Maximum Quantity		EAC	Ή	Туре	·	
Fixed Lot Multiple				Organization	v	
Minimum Order Quantity		EAC	H	Subinventory		w
Maximum Order Quantity		EAC	H			
PAR Settings				PAR Maximum Quantity		
Replenishment Count Type	~			PAR Level UOM		v
PAR Level				Count Tolerance Percentage	_	
					26	
				Save and Create Anothe	er <u>S</u> ave and Close	<u>C</u> ancel

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

28. Click the Done button.

-		5			☆	ÞÇ	NS
Manage Item Subinventories ③							
▶ Search							
S	earch Result	ts					
	Actions • View •	+ / ×	Manage Item Locators				
_	Subinventory	ltem	Item Description		Inventory Planning Mothod	Addition Informat	nal tion
I	FE01	<b>3000015</b>	BANDAGE, ELASTIC WRAP, 6" X 5 YDS, ACE OR EQUIV		Not planned		27
1	FE01	<b>3002644</b>	TAPE, SURGICAL, CLOTH, 1" X 10 YD		Not planned	2	
	FE01	3002645	TAPE, SURGICAL, CLOTH, 2" X 10 YD		Not planned	۶. All	
	FE01	3003204	BAND-AID, 1", OR EQUIV, 50/BOX		Not planned	1	
	FE01	×3003268	SUTURE REMOVAL KIT		Not planned	E.	
	FE01	<b>3000013</b>	BANDAGE, ELASTIC WRAP, 3" X 5 YDS, ACE OR EQUIV		Not planned	E.	
	FE01	3000014	BANDAGE, ELASTIC WRAP, 4" X 5 YDS, ACE OR EQUIV		Not planned	1	
	FE01	3000018	BAND-AID, 2", OR EQUIV, 50/BOX		Not planned	1	
	FE01	3000122	GAUZE, NON-STERILE, 2" X 2", 200/PACK		Not planned	1	
	FE01	3000124	GAUZE, NON-STERILE, 3" X 3", 200/PACK		Not planned		-
3	000015 FE	E01 : Item Su	ibinventory Details				
		Item 3000015	-	Maximum Quantity Fixed Lot Multiple			
	Item Desc	ription BANDAGE	, ELASTIC WRAP, 6" X 5 YDS, ACE OR EQUIV	Minimum Order Quantity			
	Minimum Q	uantity	v	Maximum Order Quantity			
L	ead Times in [	Davs		Sourcing			
Preprocessing				Туре			
		Processing		Organization			
	Po	stprocessing		Subinventory			
F	AR Settings			DAD Maximum Quantity			
	Replenishmen	nt Count Type		PAR Level UOM			
		PAR Level		Count Tolerance Percentage			

NORTH CAROLINA OFFICE OF THE STATE CONTROLLER



#### **0800DPINI Non-Inventory Organization item Association**

To Associate a New Item to your 0800DPINI Non-Inventory Organization in NCFS, please follow the steps below:

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

Gduct Information Management Create Item ×				
Edit Item: 12345678910 (ITEMMASTERORG) ⑦				Rg Social 😽 Actions ▼   Save ▼ Cancel
No Items to display None 🖐	Item * Description Item Class Approval Status Completeness Score Created By	12345678910 DPI TEST ITEM CREATION DPI Item Class Approved P00015116	Item Status Lifecycle Phase <u>User Item Type</u> Pack Type Revision Creation Date	Active  Production Purchased Item  0 19/2/23 9:40 AM
Overview Specifications Structures Attachments Associations Relationships Categories Quality Formatted Description	y	DPI TEST ITEM CREATION EXTENDED DESCRIPTION	A	
✓ Unit of Measure ⑦ Primary Unit of Measure EACH		Defaulting Co	ontrol	

- 2. Click the **Select and Add** Icon or Click the Actions drop down and **Select and Add** and a Popup window will appear to **Select and Add: Organizations.**
- 3. Enter the **0800DPINI** Non-Inventory Organization to Associate item to and Click the **Search** button.

odu an information Management Create Item ×		
Edit Item: 12345678910 (ITEMMASTERORG) ⑦ *		Social 😻 🛛 Actions 👻 🛛 Save 🔻 Canc
	Select and Add: Organizations X	Item Status Active v
No items to display	Search Organization V 0800DPINI Q	Lifecycle Phase Production User Item Type Purchased Item
Con	A Completes :	Pack Type v
None 🛖	Available List Selected List	Creation Date 10/2/23 9:40 AM
Overview Specifications Structures Attachments Associations Relationships Categories Quality	> × ×	
Organizations Supplier Organizations 2 Actions + View + Format + 3	× ×	
Organization Organization Name Item Status <sup>4</sup> Primary Unit of Measure	Tr M	Positive Negative Change Order: Change Line Eator Factor Factor
ITEMMASTERO INVENTORY ITEM MASTER Active EACH	Primary Primary	0 0 Approved
Columns Hidden 3		

\*\*\*NOTE: Always Associate New Items for 08BOOKS and 08OTHER Organizations to the Non-Inventory Organization 0800DPINI (0800-DPI-NON-INVENTORY) first\*\*\*

4. Select the **Organization** and the **DPI Item Template (ITEMMASTERORG)** will populate under Available List.



5. Click the **Single Arrow** to move this template to the Selected List.

Select and Add: O	rganizations	×
Search Organization	✓ 0800DPINI Q	
Organization 0800DPINI	Organization Name 0800-DPI-NON-INVENTORY	٦
Templates : 08		•
Available List DPI Item Template (I Root Item Template (	TEMMASTERORG)  Selected List  TEMMASTERORG  Selected List  Selected List Selected List Selected List Selected List Selected Li	
	Apply Done Can	cel

6. Click Appy and then Done.

Select	and Add: O	rganizat	ions						×
Search	Organization	*	0800DPINI		Q				
Org	anization	Organi	zation Name						
0800	DPINI	0800-DI	PI-NON-INVEN	TORY					
				•					•
Availabl	e List	TENNAO	750000	7	Selected L	.ist	TENNIAOTE		
Availabl	e List			_	Selected L	.ist			
Root Ite	rm Template (I	TEMMAS	TERORG)	> >> < «	DPIItem	Iemplate (I	TEMMASTER	(ORG)	К < У У
						(		D <u>o</u> ne	<u>C</u> ancel

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



#### 8. Click Save.

roduct Information Management Create Item ×						•
Edit Item: 12345678910 (ITEMMASTERORG) (	⊉ ★				R Social	Actions V Save V Cancel
		Item	12345678910		Item Status Active 🗸	
No items to display		* Description	DPI TEST ITEM CREATION		Lifecycle Phase Production	
		Item Class	DPI Item Class		User Item Type Purchased Item	~
		Approval Status	Approved		Pack Type	~
	С	ompleteness Score			Revision 0	
None 🕂		Created By	<b>P</b> 00815116		Creation Date 10/2/23 9:40 AN	
Overview         Specifications         Structures         Attachments         Associations           Organizations         Supplier Organizations         Actions         Yeav         Format          The two processing for two processing for the two processing for tw	Relationships Categories Quality					
Organization Organization Name	Item Status * Primary Unit of Measure	Tracking Unit of Measure	Pricing Secondary Uni of Measure	t Defaulting Positive Control Deviation Factor	Negative Deviation Approval Sta Factor	tus Change Order: Change Line Line Status
0800DPINI 0800-DPI-NON-INVENTORY	Active EACH	Primary	Primary		0 Approved	
ITEMMASTERO INVENTORY ITEM MASTER	Active EACH	Primary	Primary		0 Approved	

**TIP:** When Selecting and Adding Organizations/Association to an Item, you can pull up a complete list of DPI warehouses and the 0800DPINI Non-Inventory Organization using a numeric character and percentage sign **(08%)**.

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 **DPI Item Template (ITEMMASTERORG)** will be selected for all Organizations selected.

Select and Add: Or	ganizations ×
earch Organization	✓ 08%
Organization	Organization Name
0800DPINI	0800-DPI-NON-INVENTORY
08010M	ALAMANCE-BURLINGTON
08020M	ALEXANDER COUNTY
08030M	ALLEGHANY COUNTY
08040M	ANSON COUNTY
08050M	ASHE COUNTY
08060M	AVERY COUNTY
08070M	BEAUFORT COUNTY
08080M	BERTIE COUNTY
08090M	BLADEN COUNTY
08100M	BRUNSWICK COUNTY
08110M	BUNCOMBE COUNTY
08111M	ASHEVILLE CITY
08120M	BURKE COUNTY
08130M	CABARRUS COUNTY
08132M	KANNAPOLIS CITY
emplates : vailable List	Selected List
	Apply Done Cancel



# **DPI Inventory Organization Association**

- Repeat steps 1-8 to add additional DPI Organization associations to the newly created item.
   See Example below\*\*\*
- 2. Click **Apply** and **Done**.

Select an	nd Add: Organ	izatior	ns		×
Search	Organization	¥ 08	8BOOKS	٩	
Organ	ization Or	ganizat	tion Name		
08BOC	DKS DP	I TEXTE	BOOK WHSE		
			4		•
Templa	tes : 08BOC	OKS			
Available I	List			Selected List	
Root Item	Template (ITEM	MASTE	RORG)	DPI Item Template (ITEMMASTEROF	RG)
				»	~
				4	~
				«	$\times$
					D <u>o</u> ne <u>C</u> ancel

- 3. The newly Associated DPI Inventory Organization will now appear under the item's **Associations** tab.
- 4. Click Save.

Product Information Management Create Item ×								
Edit Item: 12345678910 (ITEMMASTERORG)	∅ ★			Ry Social Actions V Save V Cancel				
		Item 12345678910		Item Status Active				
No items to display	* Des	cription DPI TEST ITEM CREATION	L	ifecycle Phase Production				
	Ite	n Class DPI Item Class	ļ	User Item Type Purchased Item				
	Approva	Status Approved		Pack Type 🗸				
	Completenes	s Score		Revision 0				
None 🚽	Cre	ated By F00815116		Creation Date 10/2/23 9:40 AM				
Overview         Specifications         Structures         Attachments         Associations           Organizations         Supplier Organizations         Supplier Organizations         Reassign         En           Actions         View + Format + 第 副 副 X         Reassign         En         En	Relationships Categories Quality							
Organization Organization Name	* Primary Unit Tracking of Measure Measure	Unit of Pricing Secondary Unit of Pricing of Measure	nit Defaulting Positive Deviation Control Factor	Negative Deviation Approval Status Change Order: Change Line Factor Status				
0800DPINI 0800-DPI-NON-INVENTORY	Active EACH Primary	Primary		0 Approved				
3 08BOOKS DPI TEXTBOOK WHSE	Active EACH Primary	Primary		0 Approved				
ITEMMASTERO INVENTORY ITEM MASTER	Active EACH Primary	Primary		0 Approved				



# Associate Existing Items to Additional DPI Inventory Organization(s)

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



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

Product Information Management Manage Items ×				
Manage Items	•			Done
Advanced Search				Saved Search Application Default ~
** Item Starts with  9780136763505	5 ** Keyword	]		
** Description Starts with ~	-	]		6 Savah Daast Sava Add Fields
Search Results				Search Reset Save Aud Fields
Actions  View  Format  Compare	🕂 🛱 🛱 Detach 🚽 Wrap 🖹 Image Show 🗸 Manage Item Ma	ss Changes 🔻 👌		
Item Description	Approval Status	Item Status Long Description	Item Class Organization	Image
No search conducted.				
Columns Hidden 375				

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



IS X					
×					
					Saved Search
Description	Approval Status Item S	tatus Long Description	Item Class	Organization	Image
SVVS-PRECA ENHNCD WIGRPH UTIL SE+1YR MTHXL-09-12	Approved Active	PRECALCULUS: ENHANCED -	. DPI Item Class	ITEMMASTERORG	No Image Available
SVVS-PRECA ENHINCD WIGRPH UTIL SE+1YR MTHXL G9-12	Approved Active	PRECALCULUS: ENHANCED -	. DPI Item Class	0800DPINI	No Image Available
SVVS-PRECA-ENHINCD WIGRPH UTIL SE+1YR MTHXL-69-12	Approved Active	PRECALCULUS: ENHANCED -	. DPI Item Class	08BOOKS	No Image Available
	Compare  C				Image       Show       Manage Item Mass Changes > * *         Description       Approval Status       Long Description       Item Class       Organization         SVVS-PRECA.ENHINCD W/GRPH UTIL SE+1YR MTHXL G9-12       Approved       Active      PRECALCULUS ENHANCED       DPI Item Class       0800DPINI         SVVS-PRECA.ENHINCD W/GRPH UTIL SE+1YR MTHXL G9-12       Approved       Active      PRECALCULUS ENHANCED       DPI Item Class       0800DPINI         SVVS-PRECA.ENHINCD W/GRPH UTIL SE+1YR MTHXL G9-12       Approved       Active      PRECALCULUS ENHANCED       DPI Item Class       0800DPINI

9. Click the Associations Tab.

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

Item: 978013	36763505 (ITEMMASTEROF	RG) ⑦ ★						🌄 Social 👀	Actions 🔻	Save V C
				Item	9780136763505		Item St	atus Active 🗸		
	No items to display			* Description	SVVS-PRECA:ENHNCD W/GRPH UTIL SE+1YR MTHXL:G9-12		Lifecycle Pl	ase Production		
				Item Class	DPI Item Class		User Item	ype Purchased Item		~
				Approval Status	Approved		Pack	уре	*	
			Co	ompleteness Score			Revi	sion 0		
	None 🕂			Created By	Conversion User					
					-		Creation	Date 3/6/23 11:06 PM		
riew Specifications nizations Supplie ions ▼ View ▼ Fo	s Stuctures Attachments Associations er Organizations 10 ormat v 5 Ressign	Relationships C	Categories Quality		-		Creation	Jate 3/6/23 11:06 PM		
nizations Supplie ions View Fr Export to Excel Select and Add	s Structures Attachments Associations er Organizations format • 5 Resssign	Relationships C	Categories Quality	Tracking Unit of Measure	Pricing Secondary Unit	: Defaulting Control	Creation Positive Neg Deviation Devi Factor F	ative ation Approval Status	Change Order: Line	Change L Status
view Specifications nizations Supplie lons View F F Export to Excel Select and Add Delete	s Structures Attachments Associations er Organizations 10 format	Relationships C	Categories         Quality           Detach         +# Wrap           * Primary Unit of Measure         of Measure           EACH	Tracking Unit of Measure Primary	Pricing Secondary Unit of Measure Primary	: Defaulting Control	Creation Positive Deviation Factor 0	ative Approval Status tetor 0 Approved	Change Order: Line	Change L Status
view Specifications Inizations Supplie Ions View For Export to Excel Select and Add Delete 0800DPINI	s Structures Attachments Associations er Organizations 10 format  Granization Name Reassign NVENTORY ITEM MASTER 0000-DPI-NON-INVENTORY	Relationships C Relationships	Categories Quality	Tracking Unit of Measure Primary Primary	Pricing Secondary Unit of Measure Primary Primary	: Defaulting Control	Creation Positive Nee Devision Factor P 0 0	ative Approval Status ctor 0 Approved 0 Approved	Change Order: Line	Change Li Status

- 11. Select the **DPI Organization** to associate the existing item too.
- 12. Select the **DPI Item Template:** *if only selecting one Organization for association. If selecting multiple organizations for association skip this step*.
- 13. Click Apply and the Done.



Select and Add: O	rganizations	×
Search Organization	♥ 080THER	٩
Organization	Organization Name	
08OTHER	DPI OTHER WHSE	
		< →
tvailable List Root Item Template (	ITEMMASTERORG)	Selected List DPI Item Template (ITEMMASTERORG)
		Apply Done Cancel

- 14. The newly Associated DPI Inventory Organization will now appear under the item's **Associations** tab.
- 15. Click Save.

Reduct In	formation Manageme	nt Manage Items × Item: 9780136763505 (	ITEMMA STERORG)	×								-	
Edit	ltem: 978013	6763505 (ITEMMASTERORG	6) ⑦ ★								🌄 Social 😡	Actions -	iave <b>T</b> <u>C</u> ancel
		No items to display	Item 9780136763505 Item Status * Description SWVS-PRECAENI-NCD W/GRPH UTIL SE+1YR MTHXL-G9-12 Item Class DPI tem Class User Item Type			Active  V Production Purchased Item		~					
					Approval Status	Approved				Pack Type	,	•	
				Co	mpleteness Score					Revision	0		
		None 🕂			Created By	Conversion_User			C	Creation Date	3/6/23 11:06 PM		
Overv Orga Act	iew Specifications nizations Supplier ons View + For Organization	Structures Attachments Associations Organizations mat • ภ 문 ※ Reassign 단 Organization Name	Relationships Cat	egories Quality Detach el Wrap * 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
4	080THER	DPI OTHER WHSE	Active	EACH	Primary	Primary			0	0	Approved		
	ITEMMASTERO	INVENTORY ITEM MASTER	Active	EACH	Primary	Primary		-	0	0	Approved		
	0800DPINI	0800-DPI-NON-INVENTORY	Active	EACH	Primary	Primary			0	0	Approved		
	08BOOKS	DPI TEXTBOOK WHSE	Active	EACH	Primary	Primary			0	0	Approved		

# Associate DPI items to an Organization when the Replenishment Source is 08MODBK

In some cases, DPI LEA Organizations will order inventory items from the 08MODBK warehouse. The Source Replenishment Type will need to be updated to Organization and the 08MODBK Organization will need to be selected. Follow the below steps to set up this relationship.

Follow steps 1-15 for associating an item to an organization.

- 1. Click on Specifications and then Planning.
- 2. Enter Inventory Planning Method as "Not planned".
- 3. Enter Maximum Order Quantity as "0(zero)".



- 4. Under Source enter Replenishment Type as Organization.
- 5. Under **Organization** field select the **Source Organization** from the drop down.
- 6. Click Save.

Q Overder Seattleations Structures Attach	manta Associations Relationshins Categorius Ous	Completeness Score Craded By Possession One		Revision 0 Creation Date 3/6/23 11:52 PM	7
Item Transactional Attributes Additional Attributes DPI Additional Attributes I Item Revision Additional Attributes I Item Organization Manufacturing Service Inventory Physical Attributes Sales and Order Management Planning Purchasing	ganization: Planning oral Planning ③ Inventory Planning Method Not planned ✓ Make or Buy Buy ✓ ax Quantity Minimum Maximum Order Carrying Percentage		Planner Subcontracting Component Order Quantity Minimum 4 Maximum Source 5 Replenishment Type 0 Granization Subinventor	0 Organization V DPI MODIFIED BK WHSE	
Safety	Slock Safety Stock Planning Method Not Planned   Demand Period Days of Cover		Order Modifiers Fixed Order Quantity Fixed Days Supply Fixed Lot Size Multiplier	DPI MODIFIED BK WHSE ALAMANCE-BURLINGTON Search	08MODBK 6

# Updating DPI Organization(s) Min/Max Value (Planning)

Note: Min/Max Value (Planning) is only required for 08BOOKS, 08MODBK, and 08OTHER DPI Organizations\*\*\*\*

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



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



Product Information Management					Item Management	
roduct Information Management ⊘					Create Item     Manage Items     Browse Items     Create Rack	1
Time Interval Last 24 hours	Publication Station	-	them Commission		Create Fack     Create Item Struct     Manage Catalogs     Manage Trading F	ture
All Statuses V	v	atus	100% ▼	All Statuses	Manage Item Rela     Manage Delete Gr	ationships iroups
No data available	Items (	0		<u>lıl</u>	Data Governance Manage New Item Manage Change C	n Requests Orders
Item Category Assignments	item Class (	D	4	4	Manage Item Rule     Analyze Item Rule     Manage Worklist	e Sets e Set Impact
	Catalogs (	D	No data available	No data available	Data Consolidation • Manage Item Bate • Review Supplier U	ches Uploads
	Trading Partner Items	D			Manage Spoke Sy     Manage Import Ma     Manage Data Poo	ystems laps
	Bulas Impact A	hahala	Itama far Dafinition	Home Danding Approval	Review Data Pool	I Messages

- 4. Under the Advanced Search, enter Item, Description, or Keyword.
- 5. Click Search.

Product Information Management Manage Items a	K			
Manage Items @ DPI Item Class	•			Dgne
Advanced Search				Saved Search Application Default ~
** Item Starts with v 123456789	4 Keyword			5 Search Reset Save Add Fields
▲ Search Results Actions ▼ View ▼ Format ▼ + ★	I Compare 파 () Detach el Wrap () Image Sh	ow ✔ Manage Item Mass Changes ♥ ♥		
item 1	Description	Approval Status Item Status Long Description	Item Class Organization	Image
No search conducted.				
Columns Hidden 375				

#### 6. Click on the Item for the DPI Organization to update Min/Max Value.

Pro	luct Info	rmation Management Manage Items	x							
N	lana	ge Items ⑦ DPI Item Class	- -							Done
	▶ Ad	vanced Search							Saved Sea	Application Default V
	✓ Sea	arch Results								
	Actions	▼ View ▼ Format ▼ + ×	The second secon	Manage Item Ma	ass Changes 🔻 🗘	)				
		Item	Description	Approval Status	Item Status	Long Description	Item Class	Organization	Image	
	•	12345678910	DPI TEST ITEM CREATION	Approved	Active	DPI TEST ITEM CREATION EXTE	DPI Item Class	ITEMMASTERORG	No Image Available	
	×	12345678910	DPI TEST ITEM CREATION	Approved	Active	DPI TEST ITEM CREATION EXTE	DPI Item Class	0800DPINI	No Image Available	
	6	12345678910	DPI TEST ITEM CREATION	Approved	Active	DPI TEST ITEM CREATION EXTE	DPI Item Class	08BOOKS	No Image Available	
	C	olumns Hidden 375								

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



Edàt Item: 1234567891	0 (08BOOKS) ⑦ *			Revision 0 To Social 6 Creation Date 10/2/23 11:34 A	Actions V Save V Cancel
Overview Specifications Strue	ctures Attachments Associations Relationships Cat Item Organization: Planning	tegories Quality			
Transactional Attributes Additional Attributes DPI Additional Attributes	✓ General Planning ⑦				
▲ Item Revision	Inventory Planning Method Not planne Make or Buy Buy ~	ed 🗸	Planner Subcontracting Component	~	·
d lane Orene institut	Min-Max Quantity		Order Quantity		
A Item Organization Manufacturing Service	Minimum		Minimum Maximum		
Inventory Physical Attributes	Cost		Source		
Sales and Order Management Planning Purchasing	Order		Replenishment Type	~	
	cunying recentage		Subinventory		v
	Safety Stock		Order Modifiers		
	Safety Stock Planning Method Not Plann	red 🗸	Fixed Order Quantity		
	Demand Period		Fixed Days Supply		
	Days of Cover		Fixed Lot Size Multiplier		
	Supplier Managed				

- 8. Under General Planning enter the Inventory Planning Method as "Min-max planning".
- 9. Under Min-Max Quantity enter the Minimum and Maximum quantities as "0(zero)" for both.
- 10. Under Order Quantity enter the Maximum quantity as "1".
- 11. Under Source enter the Replenishment Type as "Supplier".
- 12. Under Order Modifiers enter the Fixed Lot Size Multiplier as "1".
- 13. Click Save.

dit Item: 12345678910 (08BOOKS)	0 *		Revision 0 Rocial	Actions Save Can
Overview Specifications Structures Attachments	Associations Relationships Categories Quality			
▲ Item Item Organiz	ation: Planning			
Additional Attributes Additional Attributes	Planning ⑦			
DPI Additional Attributes	rentory Planning Method Min-max planning 🗸 🗸	Planner		•
Additional Attributes	Make or Buy 🗸	Subcontracting Component	~	
Min-Max Qu	antity	Order Quantity		
Item Organization Manufacturing Service Inventory Physical Attributes Cost	9 * Minimum 0 * Maximum 0	Source		
Sales and Order Management Planning	Order	11 Replenishment Type Su	ipplier 🗸	
Purchasing	Carrying Percentage	Organization		w
		Subinventory		Ŧ
Safety Stock		Order Modifiers		
Safety	Y Stock Planning Method Not Planned	Fixed Order Quantity		
	Demand Period	Fixed Days Supply		
	Days of Cover	12 Fixed Lot Size Multiplier 1		



#### **Current List of DPI Organizations in NCFS**

Organization Code
0800DPINI
08010M
08020M
08030M
08040M
08050M
08060M
08070M
08080M
08090M
08100M
08110M
08111M
08120M
08130M
08132M
08140M
08150M
08160M
08170M
08180M
08181M
08182M
08190M
08200M
08210M
08220M
08230M
08231M
08232M
08240M
08241M
08250M
08260M
08270M
08280M
08290M
08291M
08292M
08300M



08310M
08320M
08322M
08330M
08340M
08350M
08360M
08370M
08380M
08390M
08400M
08410M
08420M
08421M
08422M
08430M
08440M
08450M
08460M
08470M
08480M
08490M
08491M
08500M
08510M
08520M
08530M
08540M
08550M
08560M
08570M
08580M
08590M
08600M
08610M
08620M
08630M
08640M
08650M
08660M
08670M
08680M
08681M



0868AM
08690M
08700M
08710M
08720M
08730M
08740M
08750M
08760M
08761M
08770M
08780M
08790M
08800M
08810M
08820M
08821M
08830M
08840M
08850M
08860M
08861M
08862M
0886AM
08870M
08880M
08890M
08900M
0890AM
08910M
0891AM
08920M
08921M
08930M
08940M
08950M
08960M
08970M
08980M
08981M
08990M
08995M
08BOOKS



08MODBK
080THER

# 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 <u>https://www.osc.nc.gov/training/ncfs-help-documents</u>
- INV-04: QRG <u>https://www.osc.nc.gov/training/ncfs-help-documents</u>

