

INV-08 Associate New Items to Inventory Orgs

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation of how to Associate New Items to Inventory Organizations in the North Carolina Financial System (**NCFS**).

Introduction and Overview

This QRG covers explanation on associating new items to the inventory organizations in NCFS which is required to store or transfer materials across the organizations.

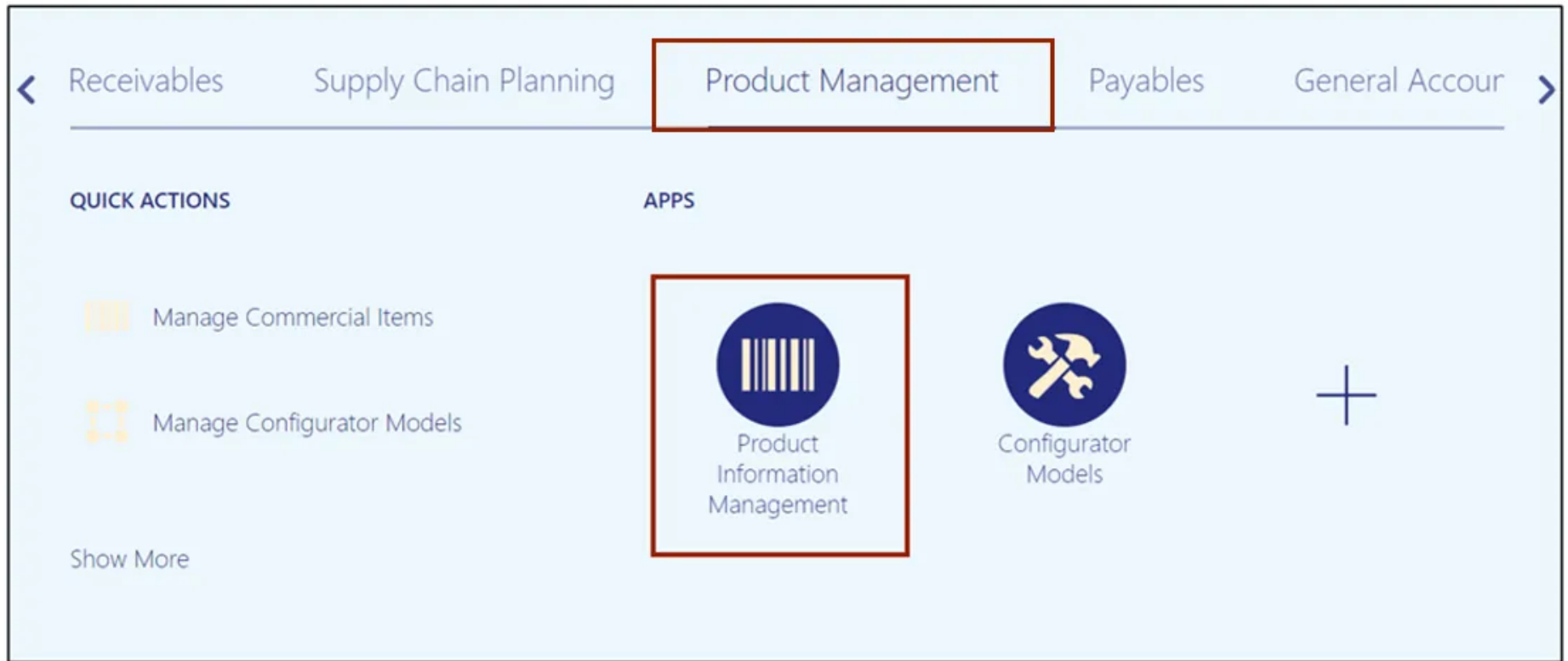
Associate New Items to Inventory Orgs

To associate new items to inventory orgs in NCFS, please follow the steps below. There are 18 steps to complete this process.

Step 1. Log in to the NCFS with your credentials to access the system.

Step 2. On the **Home** page, under the **Product Management** tab, click the **Product Information Management** app.

Image



Step 3. Click the **Tasks** icon. Under the **Item Management** section, click the **Manage Items** link.

Image

Product Information Management

Product Information Management ?

Time Interval Last 24 hours

Supplier Products

All Statuses ▼

 No data available

Publication Status

▼

Items	0
Item Class	0
Catalogs	0

New Item Priority

0 High

0 Med

0 Low

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

Step 4. Select the required **Root Item class**.

In this example, we choose **DHSS Item Class**. In the **Advanced Search** section, enter the **Item** number. In this example, we choose **3000822**. Click the **Search** button.

Image

Product Information Management **Manage Items** x

Manage Items ? ▼ Done

Advanced Search Saved Search

**** Item** Starts with ▼ **** Keyword**

**** Description** Starts with ▼

Search Reset Save... Add Fields

Search Results

Step 5. Click the **3000822** link in the **Item** column with **Organization** as **ITEMMASTERORG**.

Image

Advanced Search Saved Search

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
▶	3000822	SHOES, MEN'S, CANVAS, WHITE, LOW-CUT, SIZE 11	Approved	Active		DHHS Item Class	ITEMMASTERORG
▶	3000822	SHOES, MEN'S, CANVAS, WHITE, LOW-CUT, SIZE 11	Approved	Active		DHHS Item Class	31MAIN

Step 6. Click the **Associations** tab.

Image

Product Information Management Manage Items × Item: 3000822 (ITEMMASTERORG) ×

Edit Item: 3000822 (ITEMMASTERORG) ? ★

  Actions ▾ Save ▾ Cancel

No items to display	Item 3000822	Item Status Active ▾
	* Description SHOES, MEN'S, CANVAS, WHITE, LOW-CUT, SIZE 11	Lifecycle Phase Production
	Item Class DHHS Item Class	User Item Type Purchased Item ▾
	Approval Status Approved	Pack Type ▾
	Completeness Score	Revision 0
None +	Created By Conversion_User	Creation Date 11/17/22 4:36 AM

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

Formatted Description Long Description

Step 7. Click the **Select and Add** icon.

Image

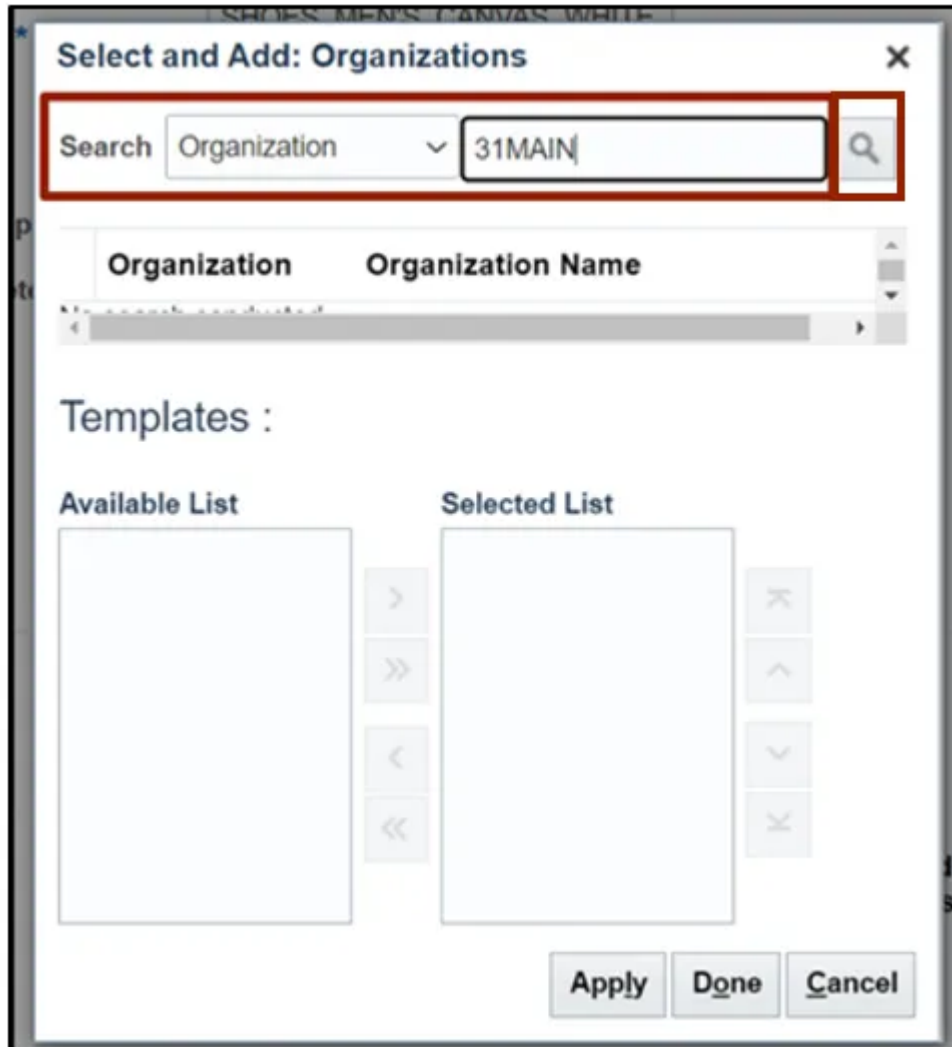
Organizations | Supplier Organizations

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
	ITEMMASTER...	INVENTORY IT...	Active	PAIR	Primary	Primary	.		0	
	3000DHHSNI	3000-DHHS-NO...	Active	PAIR	Primary	Primary	.		0	
	37MAIN	BROUGHTON ...	Active	PAIR	Primary	Primary	.		0	

Step 8. The *Select and Add: Organizations* pop-up appears. Enter the **Organization** details and Click the **Search** icon.

Image



Step 9. Select the required **Organization**.

In this example, we choose **31MAIN**.

Image

Select and Add: Organizations



Search

Organization



31MAIN



Organization

Organization Name

31MAIN

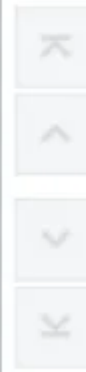
BLACK MOUNTAIN MAIN

Templates :

Available List



Selected List



Apply

Done

Cancel

Step 10. Select the appropriate **Template** to be applied as per the Business requirement. Click the **Select** icon.

Image

Select and Add: Organizations [X]

Search Organization [v] 31MAIN [Q]

Organization	Organization Name
31MAIN	BLACK MOUNTAIN MAIN

Templates : 31MAIN

Available List

- DHHS Item Template (ITEMMASTERORG)
- Root Item Template (ITEMMASTERORG)

Selected List

[>] [X] [^] [v] [X]

[Apply] [Done] [Cancel]

Step 11. Click the **Apply** button. Click the **Done** button to close the dialog box and return to the **Create Item** page.

Image

Select and Add: Organizations

Search Organization 31MAIN

Organization	Organization Name
31MAIN	BLACK MOUNTAIN MAIN

Templates : 31MAIN

Available List

Root Item Template (ITEMMASTERORG)

Selected List

DHHS Item Template (ITEMMASTERORG)

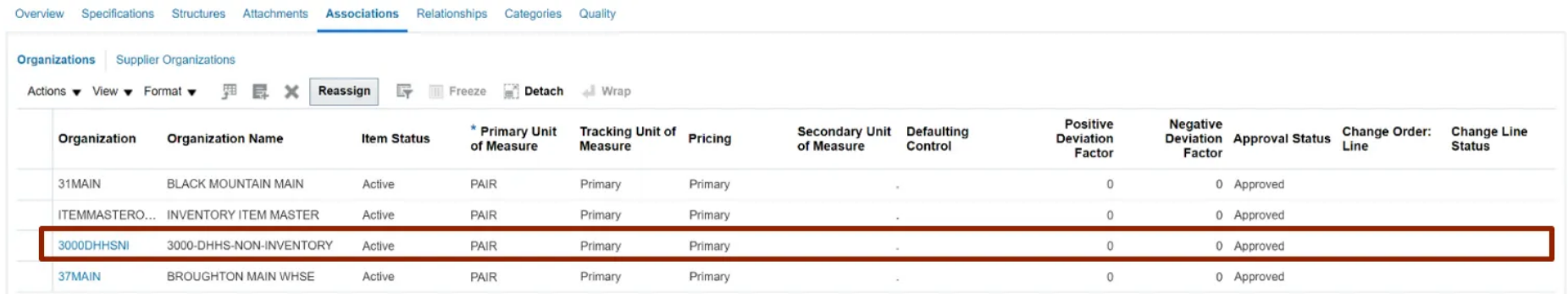
Apply Done Cancel

Associate New Items to Non-Inventory Organization

Note: Repeat Step 8 to Step 12 to assign the new item to the Non-Inventory Organization for the agency. This is a mandatory step as it enables Self-Service Procurement orders to be placed on the item along with other functionality.

Step 12. On the **Associations** tab, click the item **3000822** link for Non-Inventory Organization.

Image



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
	31MAIN	BLACK MOUNTAIN MAIN	Active	PAIR	Primary	Primary		-	0	0	Approved		
	ITEMMASTERO...	INVENTORY ITEM MASTER	Active	PAIR	Primary	Primary		-	0	0	Approved		
	3000DHHSNI	3000-DHHS-NON-INVENTORY	Active	PAIR	Primary	Primary		-	0	0	Approved		
	37MAIN	BROUGHTON MAIN WHSE	Active	PAIR	Primary	Primary		-	0	0	Approved		

Step 13. Click the **Specifications** tab. In the **Item Organization** section, click **Manufacturing**.

Image

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

Item Organization: Manufacturing

Item Structure ?

Structure Item TypeStandard

Create Configured Item

Configurator Model TypeStandard

Effectivity ControlDate

Match Configuration

Step 14. Update the **Inventory Asset Value** field as **No**.

Image

[Overview](#) **[Specifications](#)** [Structures](#) [Attachments](#) [Associations](#) [Relationships](#) [Categories](#) [Quality](#)

Item Organization: Manufacturing

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 Structure ?

Structure Item Type Standard ▾

Create Configured Item ▾

Configurator Model Type Standard ▾

Effectivity Control Date ▾

Match Configuration ▾

Costing ?

Costing Enabled Yes ▾

Include in Rollup Yes ▾

Base Model 🔍

Autocreated Configuration No ▾

Pick Components No ▾

Assemble to Order No ▾

Standard Lot Size

Inventory Asset Value No ▾

Step 15. Click the **Save** button.

Image

Product Information Management Manage Items × Item: 3000822 (ITEMMASTERORG) × **Item: 3000822 (31MAIN)** ×

Edit Item: 3000822 (31MAIN) ⓘ ★

Social  Actions ▾ **Save** ▾ **Cancel**

No items to display

Item	3000822	Item Status	Active ▾
* Description	SHOES, MEN'S, CANVAS, WHITE, LOW-CUT, SIZE 11	Lifecycle Phase	Production
Item Class	DHHS Item Class	User Item Type	Purchased Item

Step 16. In the **Item Organization** section, click **Inventory**.

Image

[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: Manufacturing

Item Structure ?

Structure Item TypeStandard

Create Configured Item

Configurator Model TypeStandard

Effectivity ControlDate

Match Configuration

Costing ?

Costing EnabledYes

Include in RollupYes

Step 17. Update the **Stocked** field as **No**.

Image

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: Inventory ⓘ

Material Control

Inventory Item	Yes ▾
Stocked	No ▾
Transaction Enabled	No ▾
Reservable	Yes ▾

Lot ⓘ

Control	No lot control ▾
Starting Prefix	

Step 18. Click the **Save and Close** button.

Image

The screenshot shows a web application interface for editing an item. The title bar reads 'Edit Item: 3000880 (3000DHHSNI)'. In the top right corner, there is an 'Actions' menu with a dropdown arrow. The dropdown menu is open, showing two options: 'Save and Close' and 'Save to Change Order'. The 'Save and Close' option is highlighted with a red rectangular box. Below the title bar, there are tabs for 'Overview', 'Specifications', 'Structures', 'Attachments', 'Associations', 'Relationships', 'Categories', and 'Quality'. The 'Specifications' tab is currently selected. On the left side, there is a sidebar with a tree view containing 'Item', 'Item Revision', and 'Item Organization'. The main content area is titled 'Item Organization: Manufacturing' and contains a section for 'Item Structure'. This section includes several configuration options: 'Structure Item Type' (Standard), 'Create Configured Item' (a dropdown menu), 'Configurator Model Type' (Standard), 'Effectivity Control' (Date), 'Match Configuration' (a dropdown menu), 'Base Model' (a searchable text field), 'Autocreated Configuration' (No), 'Pick Components' (No), and 'Assemble to Order' (No).

Wrap-Up

Associate new items to inventory orgs in NCFS using the steps above.

Additional Resources

- Virtual Instructor-Led Training (vILT)
 - [INV101: Inventory Agency Manager](#)
 - [INV109: Inventory Item Maintenance](#)

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