

MFG-10 Create and Update Product Master Data

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step guide of how to create and update product master data in the North Carolina Financial System (**NCFS**).

Introduction and Overview

This QRG covers the process of the creation and modification of Product Master Data primarily through the Product Information Management (PIM) module within the Product Hub. There are two types of products: Inventory Items and Manufactured Items. Inventory Items are used for internal consumption or for manufacturing a finished product, which is stocked, tracked, and valued in inventory. While Manufactured Items are manufactured in the Plant using Inventory Items. Manufactured Items are either internally consumed or sold to external customers.

Initiate Product Creation

There are 11 steps to complete this process.

Step 1. Log in to the NCFS portal using the **Company Single Sign-On (SSO)** button.

Step 2. Enter your **@dac.nc.gov** email address.

Step 3. Click **Next**, then enter your **password**.

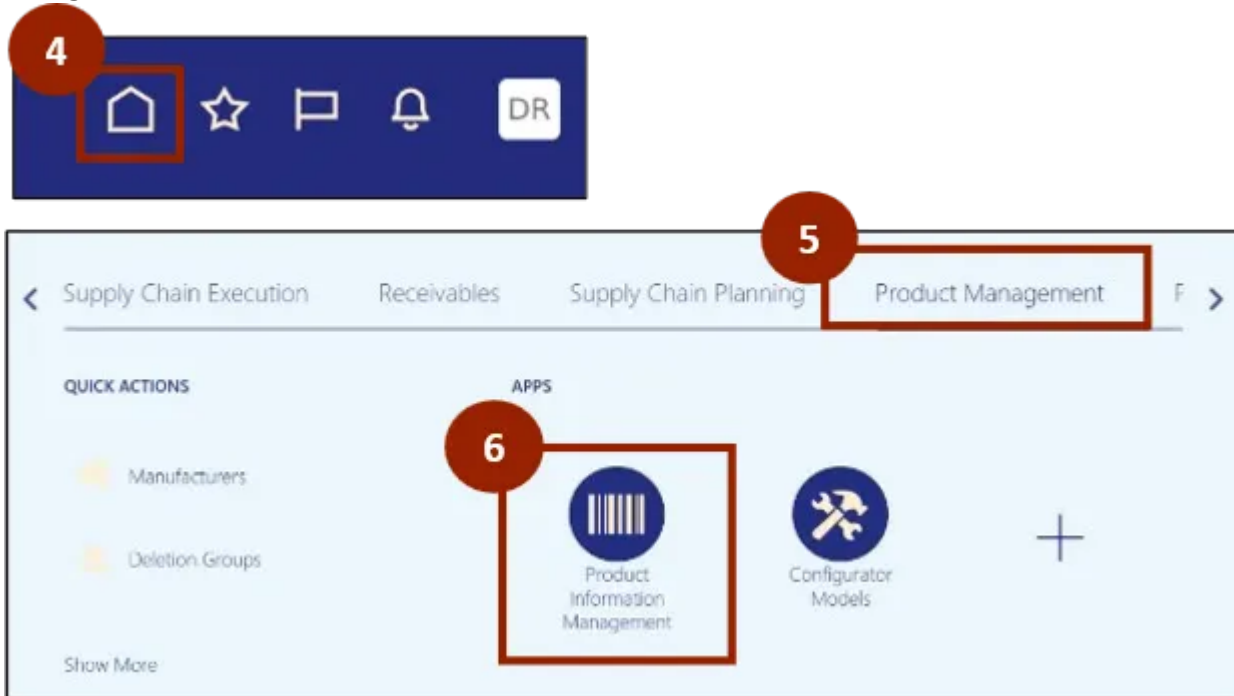
Note: The system will automatically sign on using SSO and log in to NCFS. After the first login using SSO, future access may not require credentials. If SSO is not available, enter credentials manually within the Username and Password fields, then click **Sign-In**.

Step 4. Begin from the Home page, or click the **Home** icon.

Step 5. On the Home page, select **Product Management**.

Step 6. Within the **Product Management** tab, select **Product Information Management**.

Image



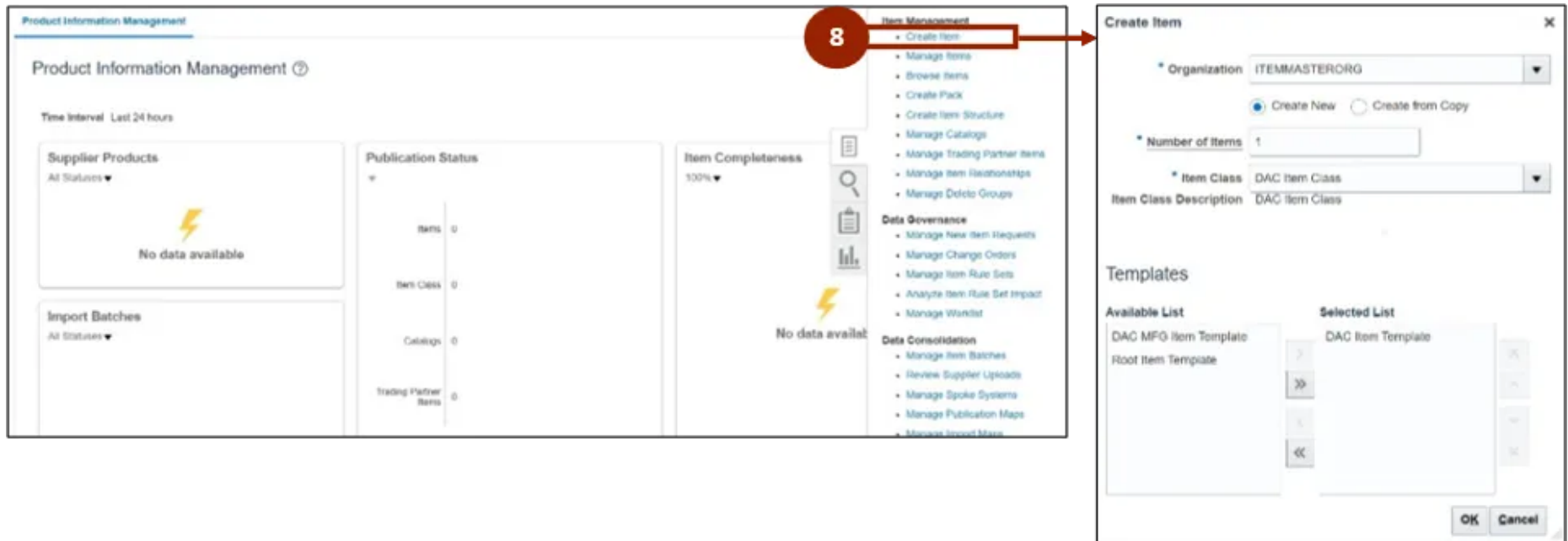
Step 7. Click the **Task** icon.

Image



Step 8. Under the Item Management heading, click **Create Item**.

Image



Step 9. In the Organization field, enter **ITEMMASTERORG**.

Step 10. In the Number of Items field, enter the **Quantity** required.

Step 11. In the Item Class field, enter **DAC Item Class**.

Note: Defining the item at the master level ensures that all units use the same item definition.

Image

The screenshot shows the 'Create Item' dialog box with the following fields and options:

- 9** * Organization: ITEMMASTERORG
- ☒ Create New ☐ Create from Copy
- 10** * Number of Items: 1
- 11** * Item Class: DAC Item Class
- Item Class Description: DAC Item Class
- Templates**
 - Available List**
 - DAC MFG Item Template
 - Root Item Template
 - Selected List**
 - DAC Item Template
- OK Cancel

Applying Item Templates

In DAC, there are two Item Templates: **DAC Item Template** and **DAC MFG Item Template**.

- **DAC Item Template** is typically the default Template selected. It is used when creating items at the ITEMMASTERORG level and creating any buy items from a DAC plant.
- **DAC MFG Item Template** is used when creating a manufacturing item from a DAC manufacturing plant, also known as finished goods.

To apply an item template, complete the following steps. There are 14 steps to complete this process.

Step 1. Within the Templates section, the Available List displays a list of templates available to apply.

Step 2. The Selected List displays the Template selected for this item, defaulted to display DAC Item Template.

Image

Create Item [X]

* Organization ▼

☒ Create New ☐ Create from Copy

* Number of Items

* Item Class ▼

Item Class Description DAC Item Class

Templates

1

Available List
DAC MFG Item Template
Root Item Template

2

Selected List
DAC Item Template

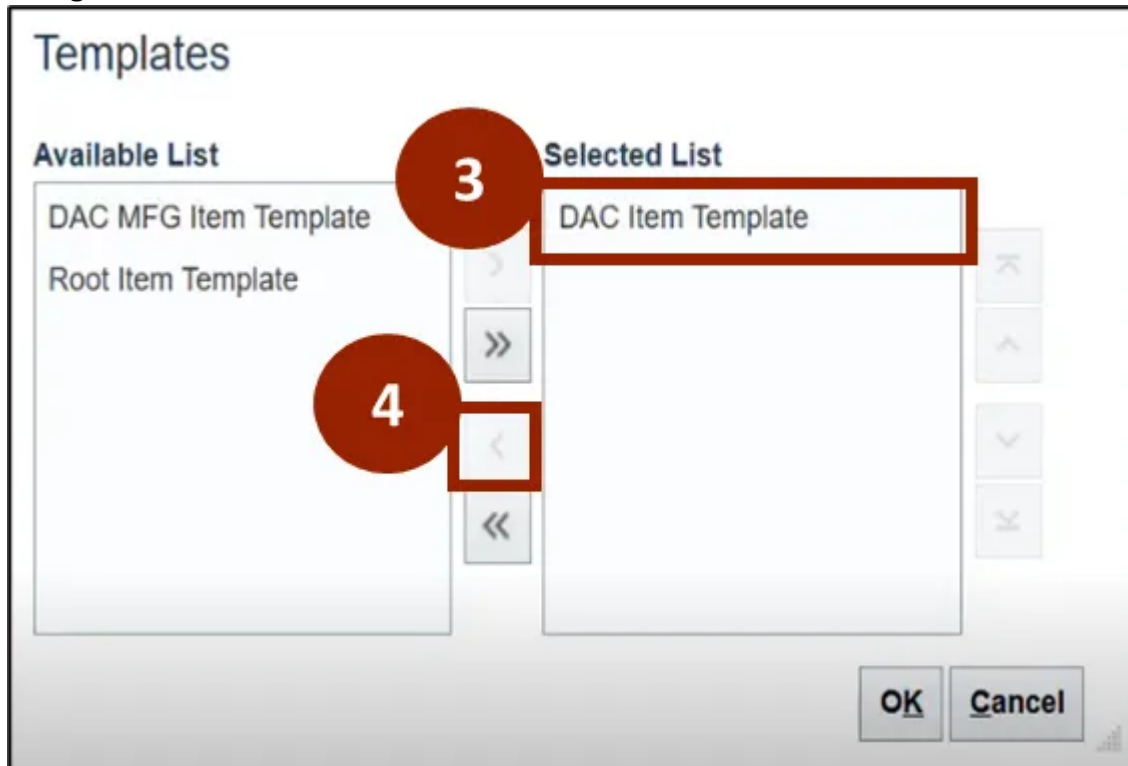
OK Cancel

To switch the defaulted Template to the DAC MFG Item Template within the Selected List follow these steps:

Step 3. Within the Selected List, select the **Item Template** you would like to move (i.e., DAC Item Template).

Step 4. Click the **left facing single arrow** to move the selected Template to the Available List.

Image

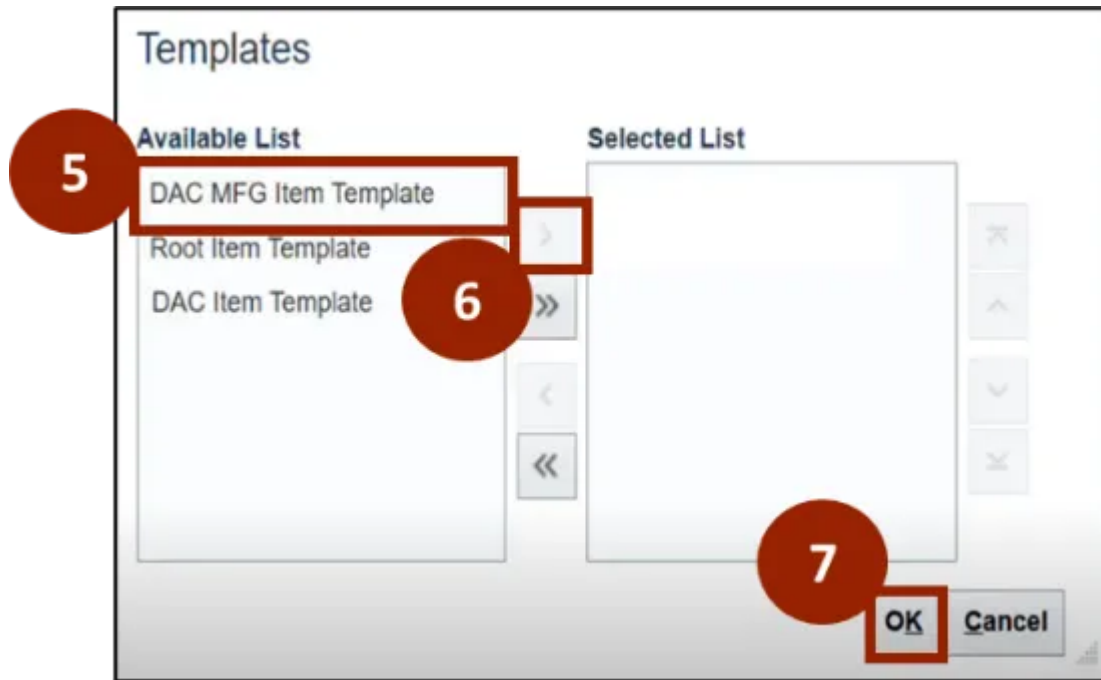


Step 5. Within the Available List, select the **Item Template** you would like to move (i.e., DAC MFG Item Template).

Step 6. Click the **right facing single arrow** to move the selected Template to the Selected List.

Step 7. Click the **OK** button.

Image



Step 8. On the Create Item screen, enter the **item description** within the Description field (e.g., standard business card, 3.5 x 2 in, matte finish).

Note: Users can input a maximum of 240 characters including spaces.

Image

8

* Item	00XXXXXX	Item Status	Active
* Description	Standard business card, 3.5 x 2 in, matte finish	Lifecycle Phase	Production
Item Class	DAC Item Class	User Item Type	MFG Item
Approval Status	Approved	Pack Type	
Completeness Score		Revision	0
Created By		Creation Date	6/13/25 11:27 AM

Step 9. Click on the **Overview** tab.

Step 10. Select the appropriate **Unit of Measure (UOM)** within the Primary Unit of Measure field based on item type (e.g., for a business card, the UOM would be “Each”).

Image

9

Overview

Specifications

Structures

Attachments

Associations

Relationships

Categories

Quality

Formatted Description

10

Mandatory Attributes

* Primary Unit of Measure

BAG

Mass

Unit of Measure

BALL

Count

Step 11. Click on the **Specifications** tab.

Note: Most specifications are auto-filled based on the selected template. Tabs such as **Manufacturing, Services, Sales and Order Management, Inventory,** and **Planning** will populate with relevant data.

Step 12. Click **DAC Additional Attributes** in the Item section.

Step 13. Enter the **Conversion Factor**.

Step 14. Select **MTO/MTS** from the drop-down.

Image

The image shows a software interface for managing product master data. The 'Specifications' tab is active. The left sidebar contains a tree view with 'Item' expanded, showing 'Transactional Attributes', 'Additional Attributes', and 'DAC Additional Attributes' (highlighted with a red box and annotation 12). Below this are 'Item Revision' and 'Item Organization'. The main area is titled 'Item: DAC Additional Attributes' and contains a 'DAC Additional Attributes' section with several fields: 'Catalog' (STCK), 'Price Option' (A), 'Seasonal Item', 'Item Group', 'Item Subgroup', and 'UOP'. To the right of these fields are 'Conversion Factor' (highlighted with a red box and annotation 13), 'SKU', 'Conversion Class', 'L' (partially visible), 'Number', and 'MTO/MTS' (highlighted with a red box and annotation 14). The 'MTO/MTS' field is a dropdown menu. The top navigation bar includes 'Overview', 'Specifications', 'Structures', 'Attachments', 'Associations', 'Relationships', 'Categories', and 'Quality'. Annotation 11 points to the 'Specifications' tab.

Manage Product Master Data Process

The next section of the process flow includes additional activities that complete the Product Master Data management process. These include Add Associations, Define Categories, Save Progress, View and Verify Item Details, Define MFG Template Structure and Finalize and Complete.

Add Associations: Inventory Organization Association Process

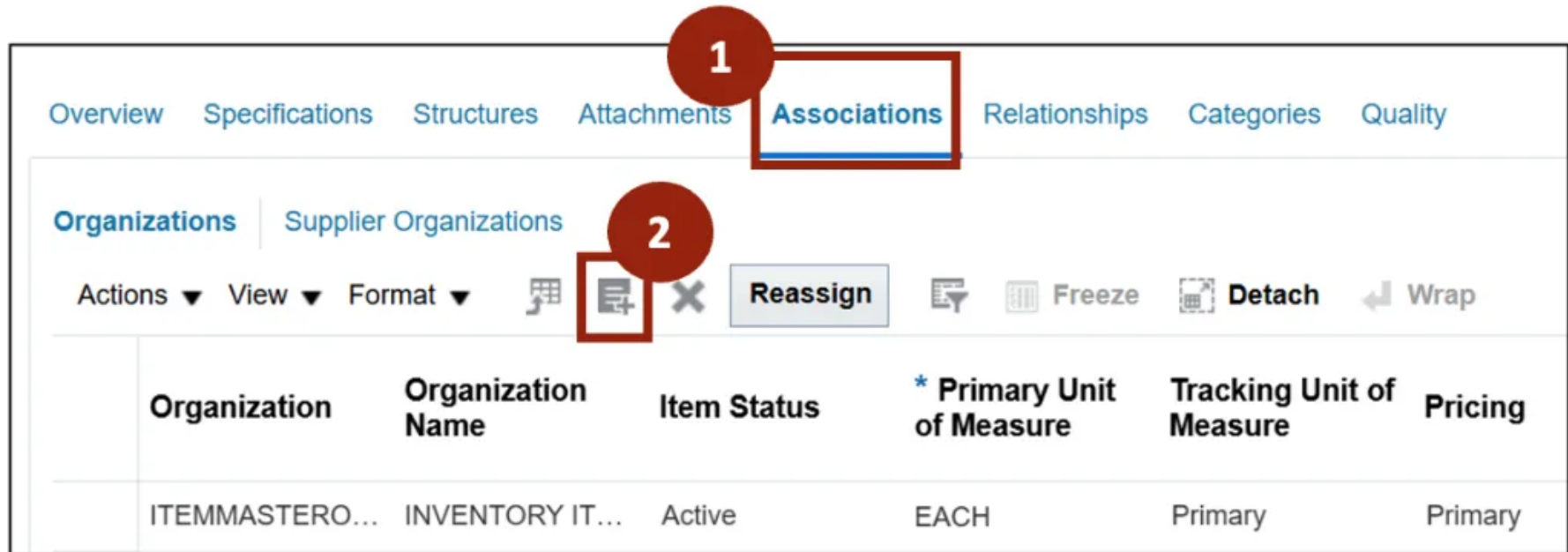
When an item is created in the system it is initially established under the ITEM MASTER ORG level. To enable the item for inventory-related transactions or operations it must be associated with an Inventory Organization.

There are 7 steps to complete this process.

Step 1. Navigate to the **Associations** tab.

Step 2. Click the **Select and Add** icon.

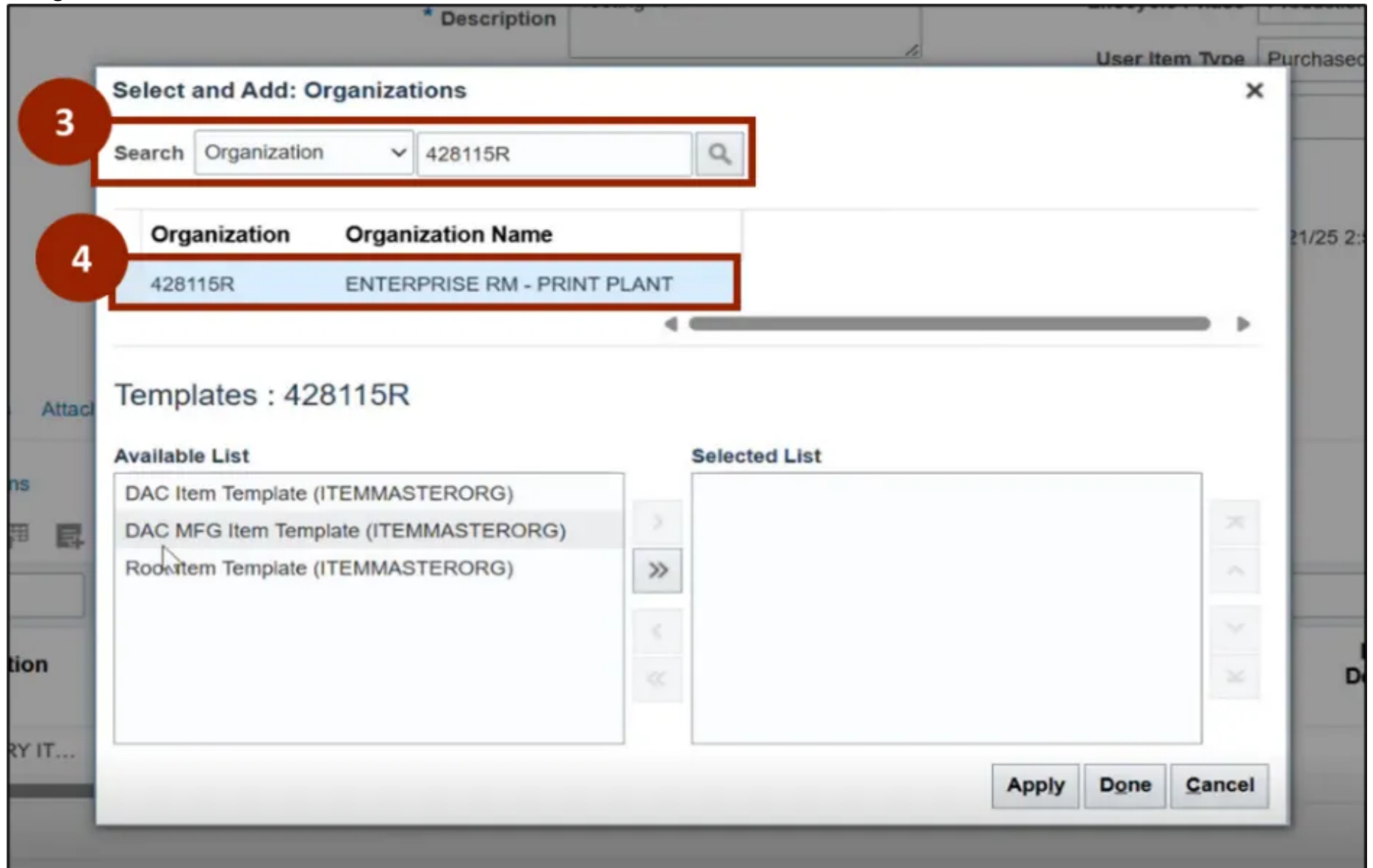
Image



Step 3. In the Organization search field, enter a **Plant** and search.

Step 4. Select the appropriate **Plant** from the results.

Image



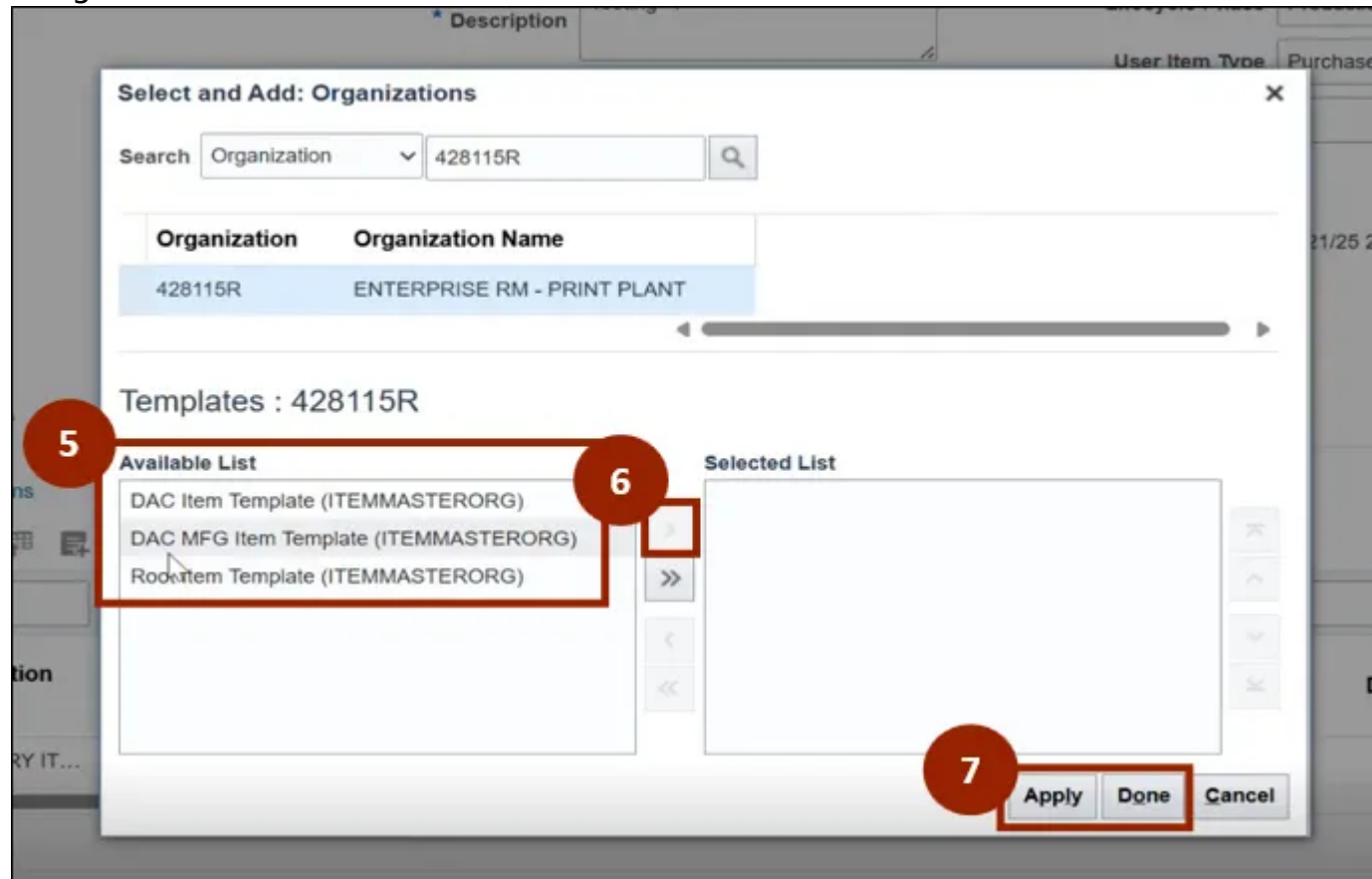
Step 5. Under the Available List, select the appropriate **Template**.

Step 6. Click the **right facing single arrow** button to add the desired template to the Selected List.

Step 7. Click **Apply**, then click **Done** to close the Select and Add: Organizations window.

Note: When associating an Item with the Organization where it will be manufactured, select the “DAC MFG Item Template” during the association process.

Image



Designate Catalogs and Categories

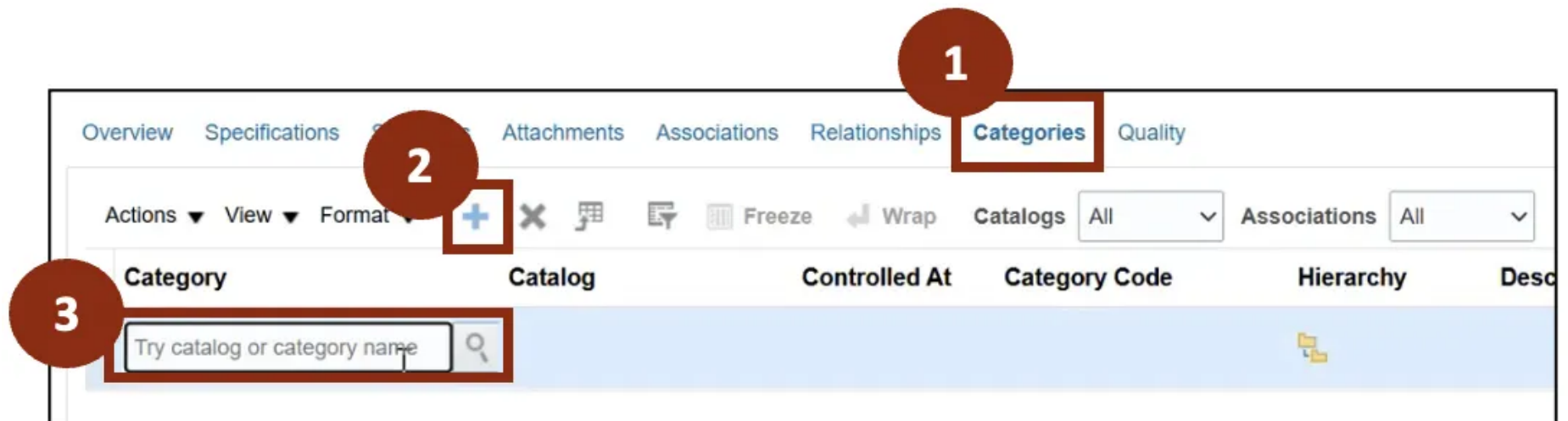
There are 7 steps to complete this process.

Step 1. To add category or catalog name, navigate to the **Categories** tab.

Step 2. Click the **Plus (+)** icon.

Step 3. Within the Category column, click the Search field icon to open the Search and Select: Category pop-up screen.

Image

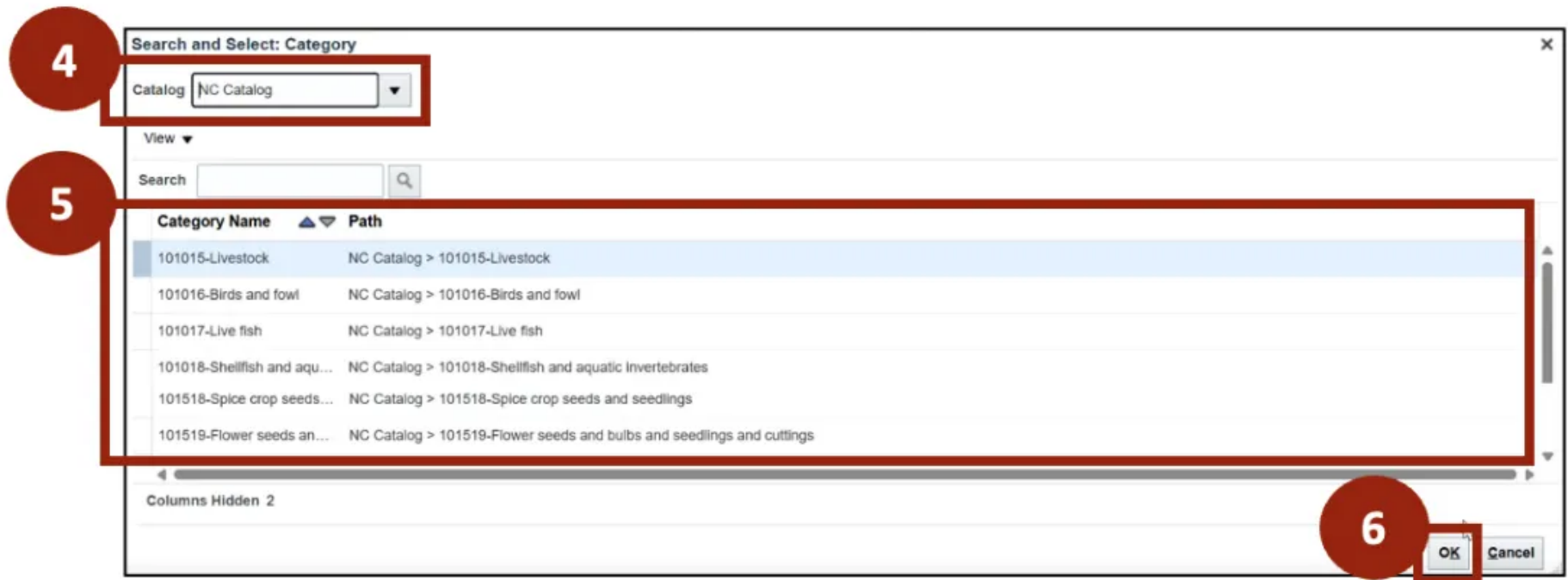


Step 4. Within the Catalog field, select **NC Catalog**.

Step 5. Select the appropriate **Category** from the results to accurately reflect the item's nature and classification.

Step 6. Scroll to the bottom of the Search and Select: Category pop-up screen and select **OK**.

Image



Save Progress.

Step 7. Click **Save**.

Note: The item currently displays as ITEMMASTERORG, highlighted below. Once saved the system will generate and display the Item Number.

Image

Edit Item: 0022367 (ITEMMASTERORG) ?

Actions ▼ Save ▼ Cancel

No Items to display

None +

Item 0022367

* Description Testing- 1

Item Class DAC Item Class

Approval Status Approved

Completeness Score

Created By Aditi.Kumari

Item Status Active ▼

Lifecycle Phase Production

User Item Type Purchased Item ▼

Pack Type ▼

Revision 0

Creation Date 4/21/25 2:53 AM

View Item in Plant and Verify Details

There are 16 steps to complete this process.

Step 1. Navigate to the **Associations** tab.

Step 2. Within the Organization column, Click the **associated hyperlink** to open the plant-specific details page.

Note: Check the item details under the **Specifications** tab as required.

Image

1

Overview	Specifications	Structures	Attachments	Associations	Relationships	Categories	Quality	History
----------	----------------	------------	-------------	--------------	---------------	------------	---------	---------

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
ITEMMASTERO...	INVENTORY IT...	Active	EACH	Primary	Primary	.		0	0
428115R	ENTERPRISE ...	Active	EACH	Primary	Primary	.		0	0

2

Step 3. Within the Plant details, verify that the User Item Type field is set to **MFG item**, as this aligns with the selection of the DAC MFG ITEM TEMPLATE for manufacturing items.

Note: The plant identification is displayed in parenthesis next to the Item Number (e.g., 428115R).

Image

Edit Item: 0022360 (428115R) ? ★

Actions ▾ | Save ▾ | Cancel

Item 0022360

No items to display

None +

* Description Standard business card, 3.5 x 2 in, matte finish

Item Class DAC Item Class

Approval Status Approved

Completeness Score

Created By

Item Status Active ▾

Lifecycle Phase Production

3 User Item Type MFG Item ▾

Pack Type ▾

Revision 0

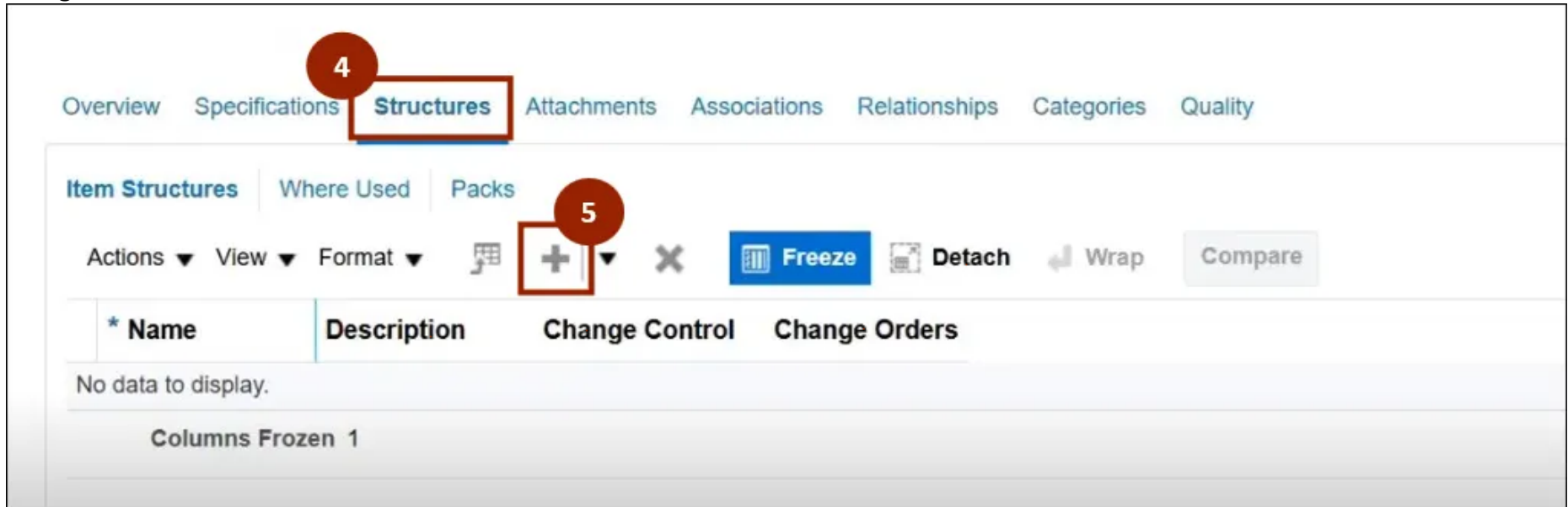
Creation Date 6/13/25 11:49 AM

Define the MFG Template Structure

Step 4. Navigate to the **Structures** tab.

Step 5. Click the **Plus (+)** icon to add a new structure.

Image



Step 6. Within the Name drop-down field, select **Primary**.

Note: Primary should be selected when creating the Item Structure.

Step 7. Click on **Apply and Add Details**.

Image

Create New Item Structure

Item 0022367

Revision 0

Organization Name ENTERPRISE RM - PRINT PLANT

Item Class DAC Item Class

* Name Primary

Description

* Effectivity Control Date

Attachments None

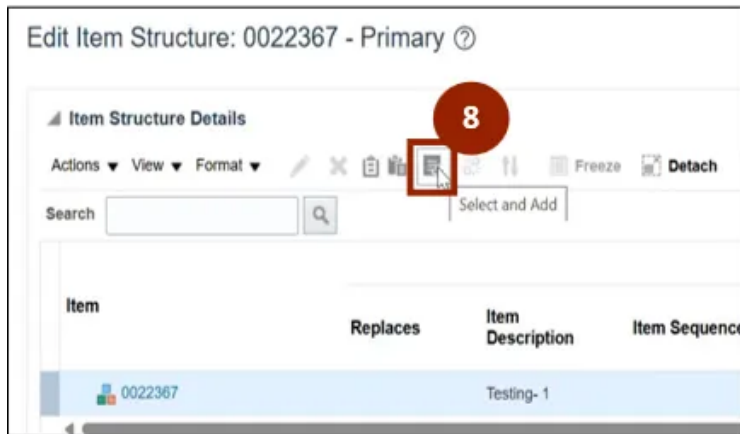
OK Apply and Add Details Cancel

Step 8. Click the **Select and Add** icon to open the Select and Add: Items pop-up screen.

Step 9. Click **Advanced** to display Advanced Search fields.

Note: If you do not see the Select and Add icon, click the **double arrows** to expand table option. The Select and Add: Items screen enables you to define all required raw materials for the Item.

Image



Step 10. In the Item Class field, select **Root Item Class**.

Step 11. Use the Advanced Search fields to search and select a specific **Item** from the **Search Results** (e.g., Item 0002400).

Step 12. Once the Item (raw material) is selected, click **Edit and Add**.

Image

Select and Add: Items

Select Item Class for Search

Item Class Root Item Class

Advanced Search

Basic Saved Search Application Default

** Item Starts with 0

** Keyword

** Description Starts with

Search Reset Save... Add Fields

Search Results

View Format Detach Wrap

Item	Description	Revision Code
No results found.		

Columns Hidden 368

Apply OK Edit and Add Cancel

Step 13. Within the Item Sequence entry field, add the **Item Sequence** (the order in which the material is used in the manufacturing process) as a two-digit number (i.e. 10, 20, 30, and so on).

Step 14. Within the Quantity entry field, add the **Quantity** of each raw material required to produce the Manufacturing Item.

Step 15. Click **OK**.

Note: Repeat the above steps before proceeding to add as many Raw Materials as needed for the Manufacturing Item.

Image

Edit Multiple Components ✕

View ▾  **Detach** Edit

Item	Item Class	Item Description	Find Number	Suggested Operation Sequence	Item Sequence	Quantity	Inverse Quantity	Yield
0002400	DAC Item Class	12-1/2" X 9-1/2" ...	1		10	1	1	

Rows Selected 1

13 **14** **15**

Finalize and Complete

Step 16. Once all raw materials have been added, click **Done**.

Image

Edit Item Structure: 0022360 - Primary ?

Done
Cancel

Item Structure Details

Actions
View
Format

Freeze
Detach
Wrap

Date
6/13/25 11:55 AM

View Summary

Search

Item	Action	Replaces	Item Description	Item Sequence	Start Date	End Date	Quantity	Inverse Quantity	Structure Item Type	Component
0022360			Standard business c							
00024	Added		12-1/2" X 9-1/2" N.C	10	6/13/25 11:55 AM		1	1	Standard	

Define Product Relationship (Optional)

At this optional but valuable stage, product relationships can be established to enhance operational and customer-facing procedures. These may include:

- **Substitute Items:** Suggested alternatives if the primary item is unavailable.
- **Related Items:** Accessories or add-ons that complement the primary item.
- **Cross-sell/Upsell Items:** Products used in marketing or sales to increase transaction value.

Creating Product Master Data - Essential Fields

When we are creating a product like a business card, the following fields need to be entered.

Field	What to Enter
Item Number	A unique identifier for the item.

Field	What to Enter
Item Description	A concise description of the item (e.g. type, finish, customization).
User Item Type	Classification for product (e.g. Manufacturing Items, purchased item).
Unit of Measure	The measurement used (e.g., Each, Pack, box).
Item Category	Logical grouping of item.
Lifecycle Phase	Current stage of item (e.g., Design, Active, Obsolete).
Purchasable	Indicate if item can be procured.
Sellable	Indicate if item can be sold.
Stockable	Whether it should be held in inventory.
Inventory Tracked	If inventory quantities can be tracked.
Shippable	Whether it can be shipped.
Returnable	Whether it can be returned.
Organizations Assigned	Select business units where the item is available.
Attachments (optional)	Upload technical specs, design templates, or images.

Change Product Master Data

There are 13 steps to complete this process.

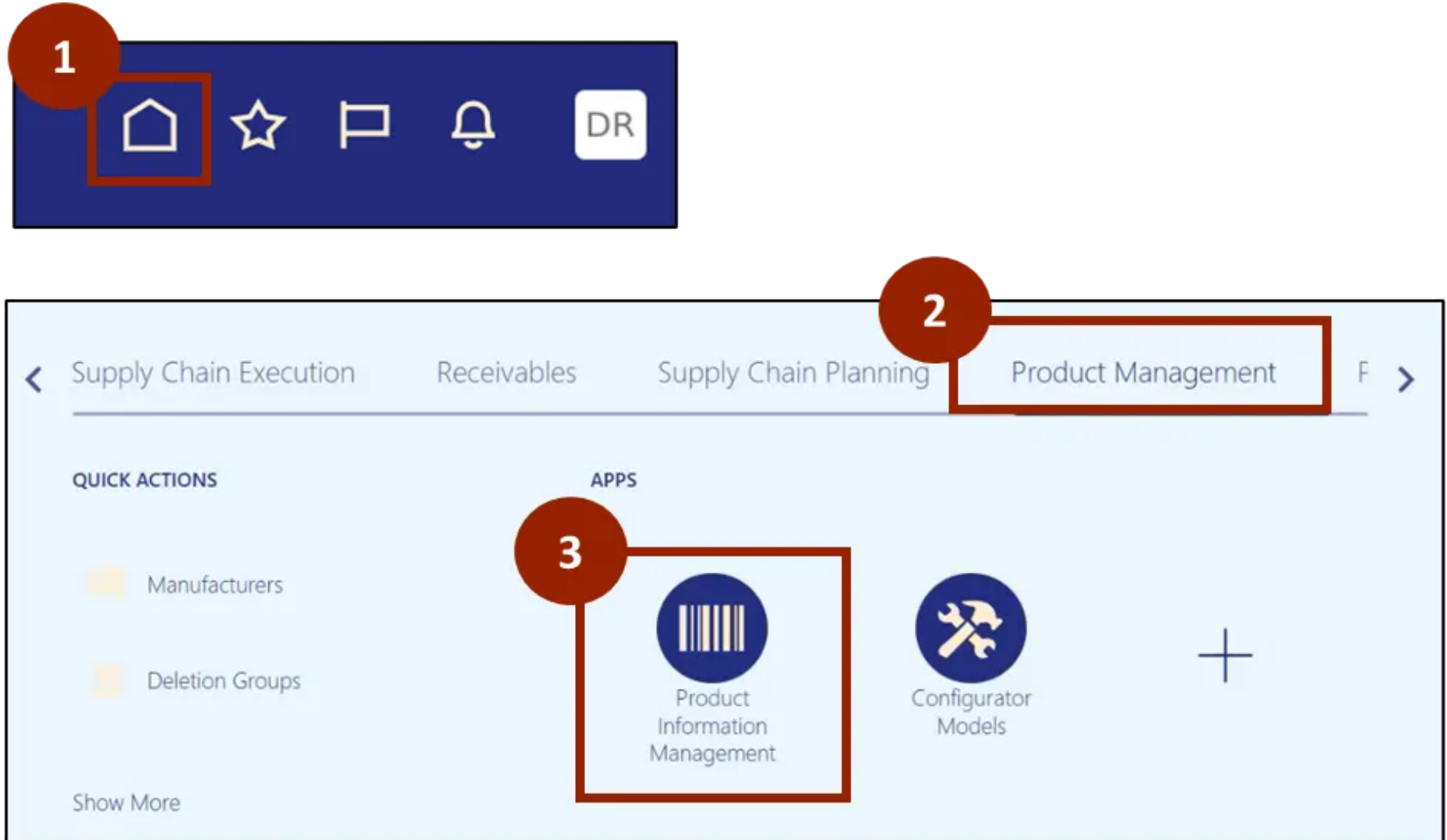
To change or update Product Master Data — such as changes to packaging, design, or other attributes — follow these steps.

Step 1. Begin from the Home page, or click the **Home** icon.

Step 2. On the Home page, select **Product Management**.

Step 3. Within the **Product Management** tab, select **Product Information Management**.

Image



Step 4. Click the **Task** icon.

Image



Step 5. Under the Item Management heading, click **Manage Items**.

Image



Step 6. Within the Advanced Search section of the Manage Items screen, enter the **Item Number** within the Item field

Step 7. Click the **Search** button.

Image

Product Information Management **Manage Items** x

Manage Items ? Root Item Class ▼ Done

Advanced Search

6 ** Item Starts with ▼ 0018711

** Keyword

** Description Starts with ▼

7 Search Reset Save... Add Fields

Saved Search Application Default ▼

Step 8. Within the Search Results section, click the **Item Number** link within the Item column to open the Edit Item screen for the selected record.

Note: In the Search Results, multiple records may appear—one for the ITEMMASTER ORG and others based on plant associations. Pay close attention to the Organization and Item Status columns, as these areas will indicate whether an item is active or inactive and display the relevant plant information. Carefully review each of the results before selecting an item to update.

Image

Search Results

Actions ▼ View ▼ Format ▼ + X Compare Detach Wrap Image Show ▼ Manage Item Mass Changes ▼ ↺

Item	Description	Approval Status	Item Status	Long Description	Item Class	Organization	Image
8 0018711	Test mfg item	Approved	Active		DAC Item Class	ITEMMASTERORG	
▶ 0018711	Test mfg item	Approved	Active		DAC Item Class	428115R	

Step 9. Within the Edit Item screen, update any of the **unlocked fields** to edit the record.

Note: Some fields within the Edit Item screen may be locked or unlocked based on your user role. Make sure you select the correct record to edit item information at either the Master or Plant level. If you cannot edit certain fields, you may not have the required permissions to edit at that level.

Image

Product Information Management Manage Items x Item: 0018711 (ITEMMASTERORG) x

Edit Item: 0018711 (ITEMMASTERORG) ? ☆

Actions Save Cancel

9

Item 0018711

* Description Test mfg item

Item Status Active

Lifecycle Phase Production

User Item Type Purchased Item

Pack Type

Revision 0

Creation Date 2/20/25 5:03 AM

Item Class DAC Item Class

Approval Status Approved

Completeness Score

Created By

No items to display

None

Step 10. To update fields, enter the **revised text** to accurately reflect the new or updated item description.

Step 11. In the Item Status drop-down field, Select the **appropriate status option** from the list (e.g., change from "Active" to "Inactive").

Step 12. The User Item drop-down field Item can be updated to display another type (i.e., MFG Item or Freight).

Note: If a change to the User Item Type is needed, it is best practice to <https://www.ncosc.gov/training/ncfs-system-training/ncfs-course-catalog/mfg107-manage-product-master-data> mark the existing **Item Status as Inactive** and create a new item with the desired type to maintain data integrity.

Image

Item 0018711

10

* Description

Test mfg item

Item Class

DAC Item Class

Approval Status

Approved

Completeness Score

Created By

11

Item Status

Active

Lifecycle Phase

Production

12

User Item Type

Purchased Item

Pack Type

Revision

0

Creation Date

2/20/25 5:03 AM

Step 13. Click **Save** once all changes have been completed.

Image

Product Information Management

Manage Items

Item: 0018711 (ITEMMASTERORG)

Edit Item: 0018711 (ITEMMASTERORG)

13

Save

Cancel

No items to display

None

Item 0018711

* Description

Test mfg item

Item Class

DAC Item Class

Approval Status

Approved

Completeness Score

Created By

Item Status

Active

Lifecycle Phase

Production

User Item Type

Purchased Item

Pack Type

Revision

0

Creation Date

2/20/25 5:03 AM

Wrap-Up

NCFS users can create and update product master data using the steps above.

Additional Resources

- Instructor Led Training (ILT)
 - [MFG107: Manage Product Master Data](#)
- Web-based Training (WBT)
 - [MFG100: Introduction to NCFS Manufacturing](#)
 - [MFG101: The Journey Through NCFS Manufacturing](#)

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