

MFG-11 Plan Inventory Replenishment

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step guide of how to Plan Inventory Replenishment in the North Carolina Financial System (**NCFS**).

Introduction and Overview

This QRG covers the process of Plan Inventory Replenishment. This process provides information on identifying the required fields and parameters for setting up items for Min-Max Planning and how to execute the process for running the Print Min-Max Planning Report in NCFS.

Plan Inventory Replenishment

Setting Items for the Min-Max Planning Report

There are 17 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. Navigate to the Home page.

Step 5. Click on the **Product Management** tab.

Step 6. Click on **Product Information Management**.

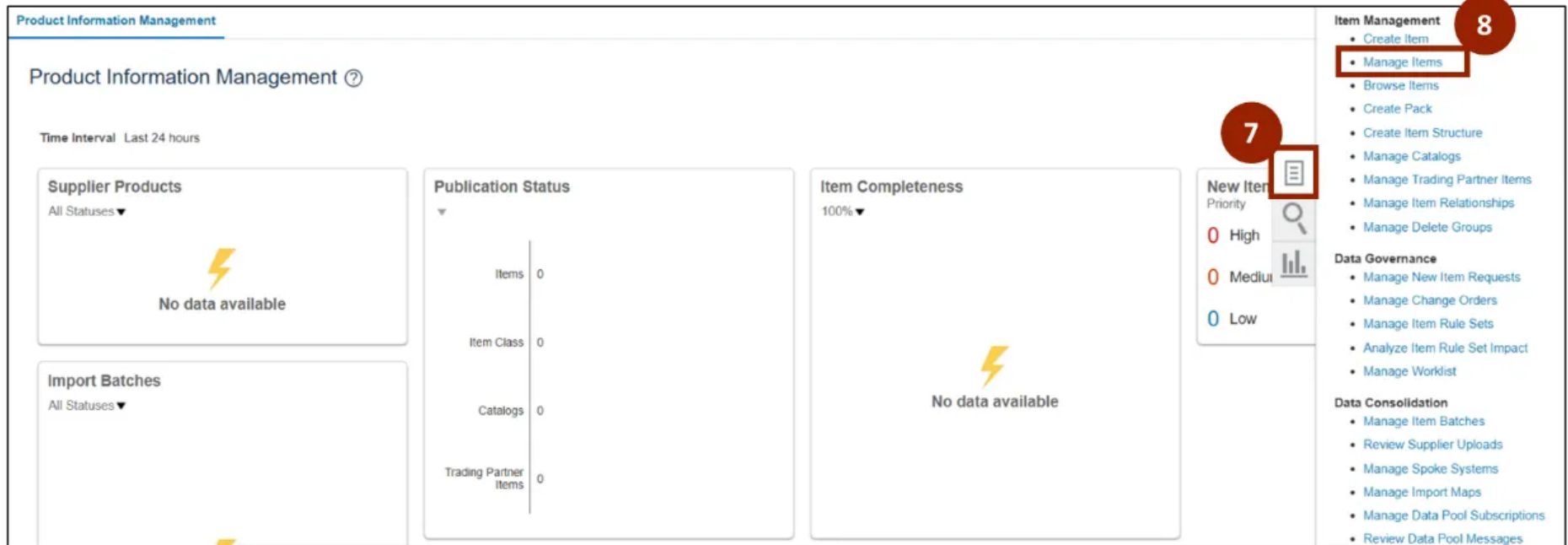
Image



Step 7. On the Product Information Management page, click the **Task** icon.

Step 8. Select the **Manage Items** option.

Image



Step 9. In the Item field, enter or select **the desired item** (i.e., 0015062) and click **Search** to find the selected item.

Note: At least one of the fields marked with a double asterisk (**) must be completed before clicking the Search button.

Image

Manage Items ? Root Item Class Done

Advanced Search Saved Search: Application Default

9a **** Item** Starts with

**** Description** Starts with

**** Keyword**

Organization Equals 428262R ×

9b Search Reset Save... Add Fields

Step 10. The Search Results table displays, click the desired **Item Number** link to open the Edit Item screen for that item.

Note: Select the item for the desired Organization. In this example we are selecting the item for Organization 428262R.

Image

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
▶ 0015062	TIE, PRISONS, BLACK, UNIFORM, UNISEX, 20" 25/PK	Approved	Active	BLACK, UNISEX TIE FOR LONG ...	DAC Item Class	428262R

Step 11. Within the Edit Item screen, click the **Specifications** tab.

Image

Edit Item: 0015062 (428262R) ? ★

No items to display

None +

Item 0015062

* Description TIE, PRISONS, BLACK, UNIFORM, UNISEX, 20" 25/PK

Item Class DAC Item Class

Approval Status Approved

Completeness Score

Created By Conversion_User

Item Status Active

Lifecycle Phase Production

User Item Type Purchased Item

Pack Type

Revision 0

Creation Date 9/24/23 7:54 PM

11

Overview Specifications Structures Attachments Associations Relationships Categories Quality

Step 12. Under the Item Organization header, click **Planning**.

Image

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

▲ Item

Transactional Attributes

Additional Attributes

DAC 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 Type Standard ▼

Create Configured Item

Configurator Model Type Standard ▼

Effectivity Control Date ▼

Match Configuration ▼

▲ Costing ?

Costing Enabled Yes ▼

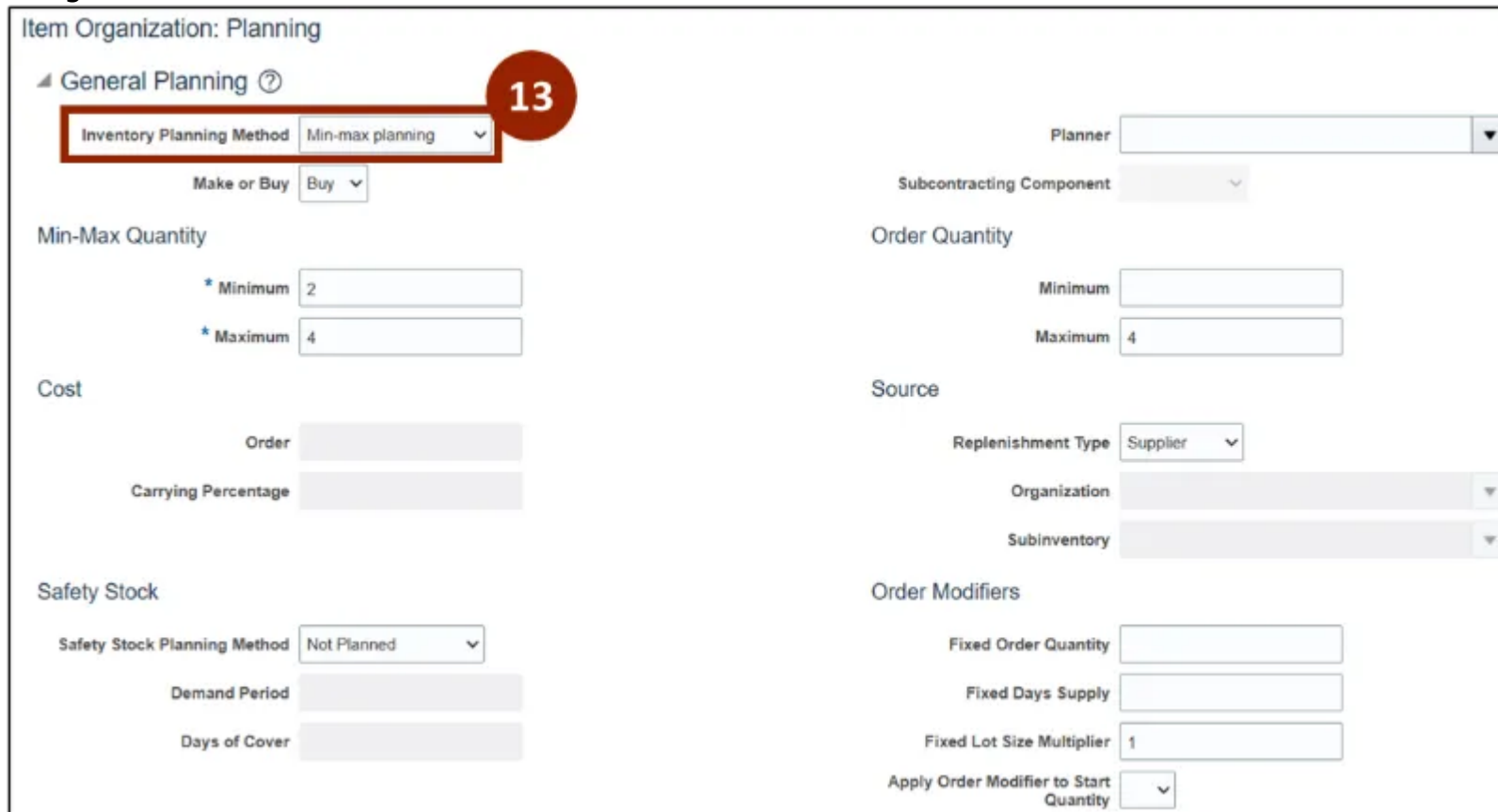
Include in Rollup Yes ▼

Note: For an item to be included within the Min-Max replenishment process, the item needs to be set with the following parameters.

Step 13. In the Inventory Planning Method field, select **Min-max planning**.

Note: If fields do not display on the Planning page, select the refresh button.

Image



Item Organization: Planning

General Planning ?

Inventory Planning Method: Min-max planning

Make or Buy: Buy

Min-Max Quantity

* Minimum: 2

* Maximum: 4

Cost

Order:

Carrying Percentage:

Safety Stock

Safety Stock Planning Method: Not Planned

Demand Period:

Days of Cover:

Planner:

Subcontracting Component:

Order Quantity

Minimum:

Maximum: 4

Source

Replenishment Type: Supplier

Organization:

Subinventory:

Order Modifiers

Fixed Order Quantity:

Fixed Days Supply:

Fixed Lot Size Multiplier: 1

Apply Order Modifier to Start Quantity:

Step 14. Enter the **Min and Max quantities** in the following fields: Minimum and Maximum. The quantities entered should be based on the Primary UOM.

Step Note: Any of the unlocked fields can be configured and adjusted, as needed. The Min-Max report will display based on selections made to fields on this screen.

Image

Item Organization: Planning

▲ General Planning ?

Inventory Planning Method

Make or Buy

Min-Max Quantity

* Minimum

* Maximum

Cost

Order

Carrying Percentage

Safety Stock

Safety Stock Planning Method

Demand Period

Days of Cover

Planner

Subcontracting Component

Order Quantity

Minimum

Maximum

Source

Replenishment Type

Organization

Subinventory

Order Modifiers

Fixed Order Quantity

Fixed Days Supply

Fixed Lot Size Multiplier

Apply Order Modifier to Start Quantity

Step 15. In the Order Quantity section, enter the **Maximum**.

Note: The Min-Max planning uses this field as follows: If the order quantity is greater than the maximum order quantity, the order quantity is revised down to the maximum.

Image

Item Organization: Planning

General Planning ?

Inventory Planning Method: Min-max planning

Make or Buy: Buy

Min-Max Quantity

* Minimum: 2

* Maximum: 4

Cost

Order:

Carrying Percentage:

Safety Stock

Safety Stock Planning Method: Not Planned

Demand Period:

Days of Cover:

Planner:

Subcontracting Component:

Order Quantity

Minimum:

Maximum: 4

Source

Replenishment Type: Supplier

Organization:

Subinventory:

Order Modifiers

Fixed Order Quantity:

Fixed Days Supply:

Fixed Lot Size Multiplier: 1

Apply Order Modifier to Start Quantity:

Step 16. In the Order Modifiers section, enter the **Fixed Lot Size Multiplier**.

Note: The Min-Max Planning uses the Fixed Lot Size Multiplier setting to round reorder quantities.

Image

Item Organization: Planning

General Planning ?

Inventory Planning Method: Min-max planning

Make or Buy: Buy

Min-Max Quantity

* Minimum: 2

* Maximum: 4

Cost

Order:

Carrying Percentage:

Safety Stock

Safety Stock Planning Method: Not Planned

Demand Period:

Days of Cover:

Planner:

Subcontracting Component:

Order Quantity

Minimum:

Maximum: 4

Source

Replenishment Type: Supplier

Organization:

Subinventory:

Order Modifiers

Fixed Order Quantity:

Fixed Days Supply:

Fixed Lot Size Multiplier: 1

Apply Order Modifier to Start Quantity:

Step 17. Once all changes have been made, click **Save**.

Image



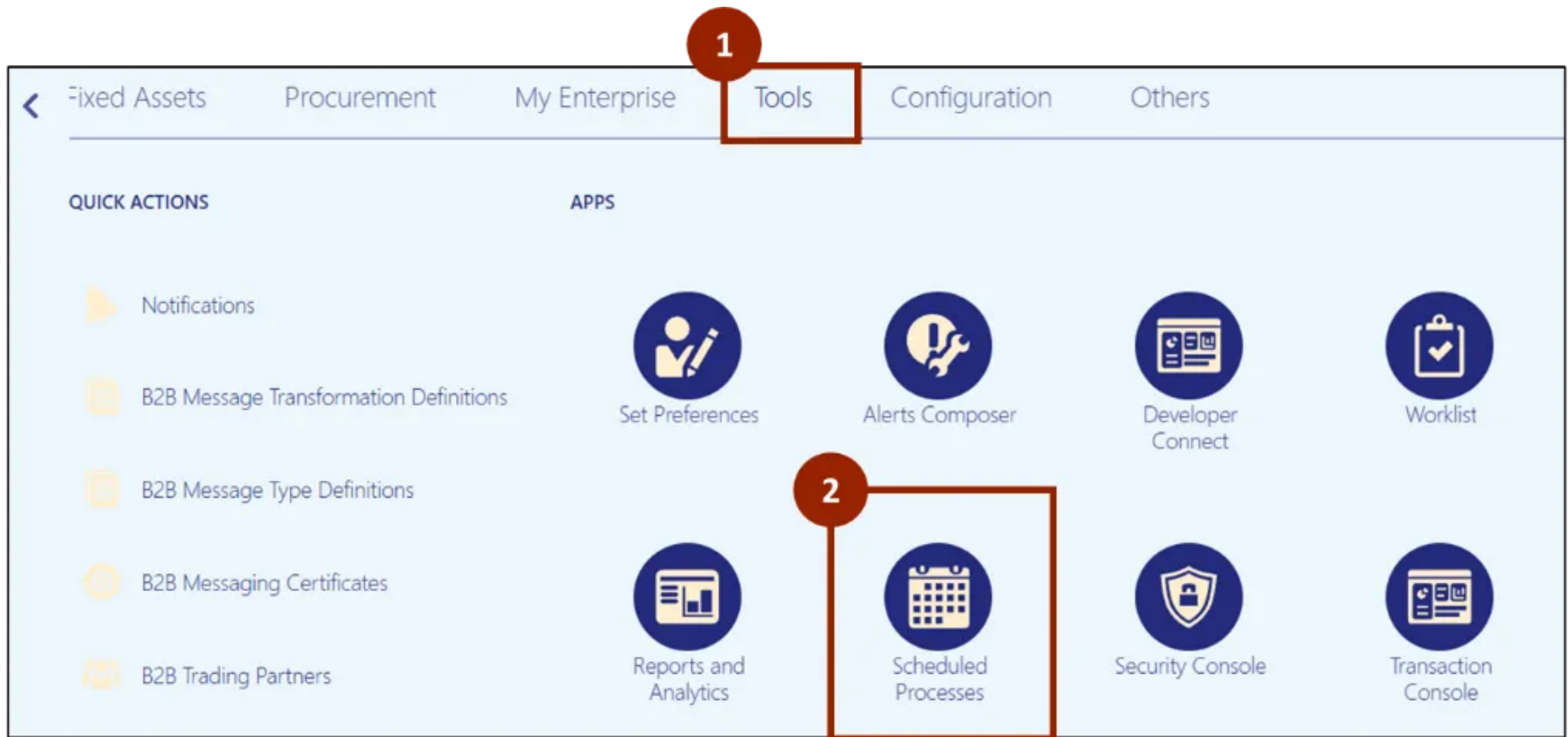
Printing the Min-Max Planning Report

Once logged in to NCFS, follow these steps. There are 17 steps to complete this process.

Step 1. From the Home screen, select the **Tools** tab.

Step 2. Click **Schedule Processes**.

Image



Step 3. The Scheduled Processes Overview screen displays, click the **Schedule New Process** button.

Image



Step 4. In the Name field of the Schedule New Processes pop-up window, enter or search **Print Min-Max Planning Report**.

Step 5. Click **OK**.

Note: Once the appropriate Job Name is selected, the Description field automatically populates.

Image

Schedule New Process

Type ☒ Job ☐ Job Set

4

Name ▼

Description Calculates min-max planning replenishment levels for items.

5

OK Cancel

The Process Details screen displays basic options for the Min-Max report parameters, the Parameters section determines what specific areas are included within the report.

Note: To generate the report, all fields marked with a single asterisk (*) are required and must be completed. The fields outlined are recommended to complete as a best practice.

Image

Process Details

This process will be queued up for submission at position 1

Process Options

Advanced

Submit

Cancel

Name

Print Min-Max Planning Report

☐

Print output

▼

Description

Calculates min-max planning replenishment level...

☐

Notify me when this process ends

Schedule

As soon as possible

Submission Notes

Basic Options

Parameters

* Organization

428115R

▼

* Sort By

Inventory item

▼

From Item

▼

To Item

▼

* Planning Level

Organization

▼

* Item Selection

All min-max planned items

▼

Step 6. In the Organization field, enter or search for the **appropriate organization** option (i.e., 428262R).

Step 7. In the Sort By field, select **Inventory Item**.

Step 8. In the Planning Level field, select **Organization**.

Step 9. In the Item Selection field, select **All min-max planned items**.

Image

Process Details [X]

Process Options | **Advanced** | **Submit** | **Cancel**

Name Print Min-Max Planning Report ☐ Print output

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

Schedule As soon as possible **Submission Notes**

Basic Options

Parameters

6 * Organization 428115R 7

* Sort By Inventory item

From Item

To Item

8 * Planning Level Organization 9

* Item Selection All min-max planned items

Step 10. All other fields displayed can be left as their **defaulted selections**.

Note: The restock should be set to No and all other Parameters can be adjusted to fit the desired report output.

Step 11. Once all Parameters have been selected, click the **Submit** button.

Image

Process Details ✕

ℹ This process will be queued up for submission at position 1

Process Options **Advanced** **Submit** **Cancel**

Name Print Min-Max Planning Report ☐ Print output ▼

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

Schedule As soon as possible **Submission Notes**

Basic Options

Parameters

10

* Restock No ▼

Ship-to Location ▼

* Net Unreserved Orders Yes ▼

* Include Interface Supply Yes ▼

* Net Reserved Orders Yes ▼

Include Nonnettable Subinventories Yes ▼

* Display Format Display all information ▼

* Display Item Description Yes ▼

* Include PO Supply Yes ▼

From Category ▼

To Category ▼

From Buyer ▼

11

Step 12. A Confirmation pop-up window displays, click **OK** to close the window.

Image



The Scheduled Processes overview screen now displays the Print Min-Max Planning Report information within the table.

Step 13. Once the scheduled report's Status displays as Succeeded, click the **Report** to open details below.

Step 14. Click the **Republish** icon.

Image

Search Results ?

View ☒ Flat List ☐ Hierarchy

Actions

Name	Process ID	Status	Scheduled Time	Submission Time
Print Min-Max Planning Report	7210638	Succeeded	7/23/25 1:22 PM EDT	7/23/25 1:22 PM EDT
ESS job to run Bulk ingest to OSCS	7210637	Wait	7/23/25 1:27 PM EDT	7/23/25 1:22 PM EDT
Ingesting attachments to OSCS	7210636	Wait	7/23/25 1:32 PM EDT	7/23/25 1:22 PM EDT
ESS process to check Search Cloud Service availability	7210635	Wait	7/23/25 1:27 PM EDT	7/23/25 1:22 PM EDT

Process Details Status Details

Print Min-Max Planning Report, 7210638

Status Succeeded Schedule Start 7/23/25 1:23 PM EDT External Job Type BIP Job External Job Status NA

Log

Attachment [ESS_L_7210638](#)

Output

Output & Delivery

XML Data Diagnostic Log

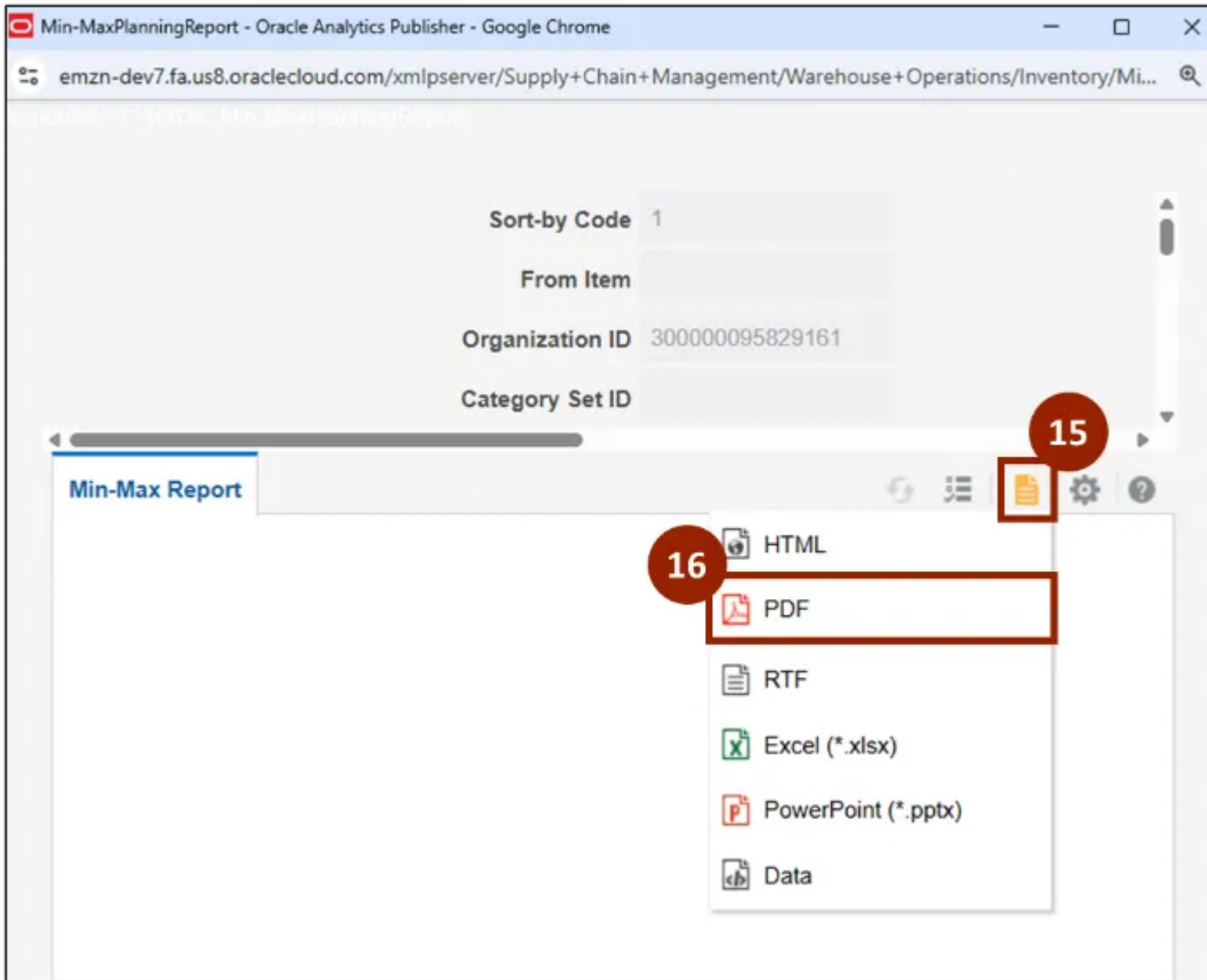
Status All

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

Step 15. Within the Min-Max Planning Report window, Click the **View Report** icon.

Step 16. Click the **PDF** option from the list.

Image



Step 17. The Min-Max Planning Report generates in PDF format, displaying all relevant information according to the parameters selected. Review all information within the report before moving forward with a new process.

Note: You can download or print the report directly from your browser window.

[illegible]

NCFS users can reference the Plan Inventory Replenishment using the steps above.

NCFS users can reference the Plan Inventory Replenishment using the steps above.

Additional Resources

- Virtual Instructor Led Training (vILT)
 - [MFG108: Manage Inventory 1](#)

First Published

Mon, 11/17/2025

Last Updated

Mon, 11/17/2025

[View PDF](#)