



ASSOCIATE NEW ITEMS TO INVENTORY ORGS

INV

QUICK REFERENCE GUIDE INV-08

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).

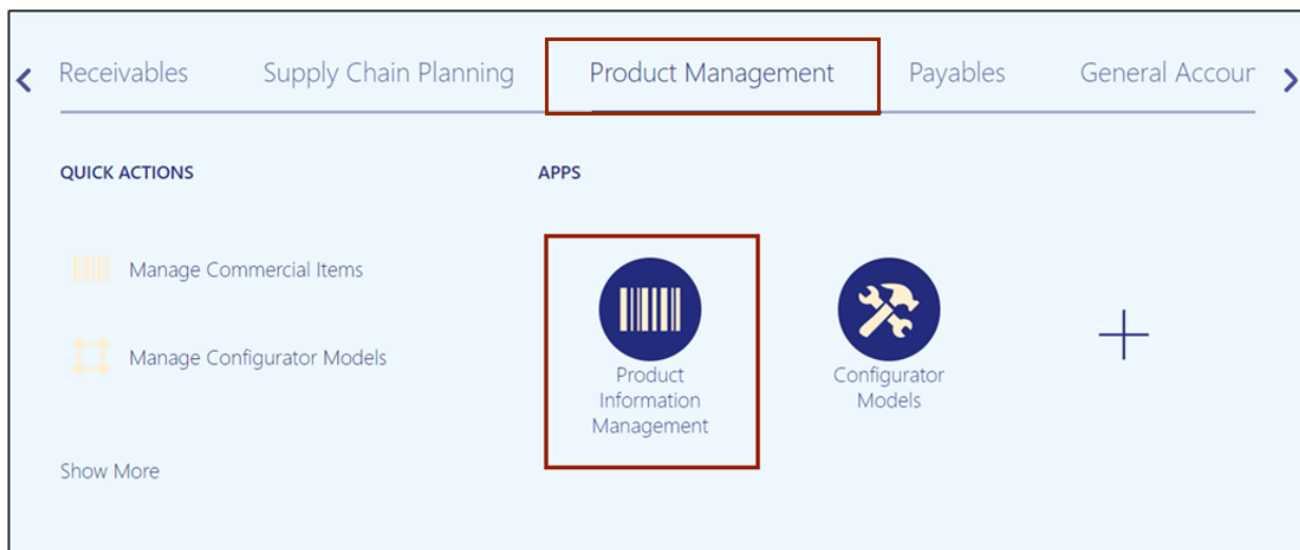
Introduction and Overview

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.

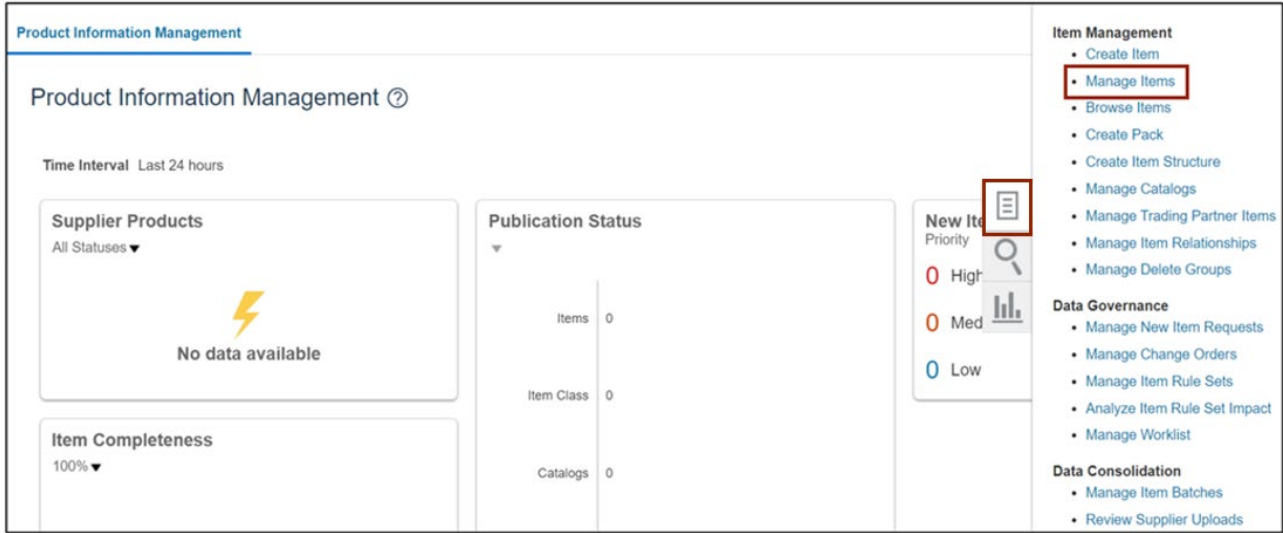
Associate New Items to Inventory Orgs

To associate new items to inventory orgs in NCFS, please follow the steps below:

1. Log in to the NCFS with your credentials to access the system.
2. On the **Home** page, under the **Product Management** tab, click the **Product Information Management** app.

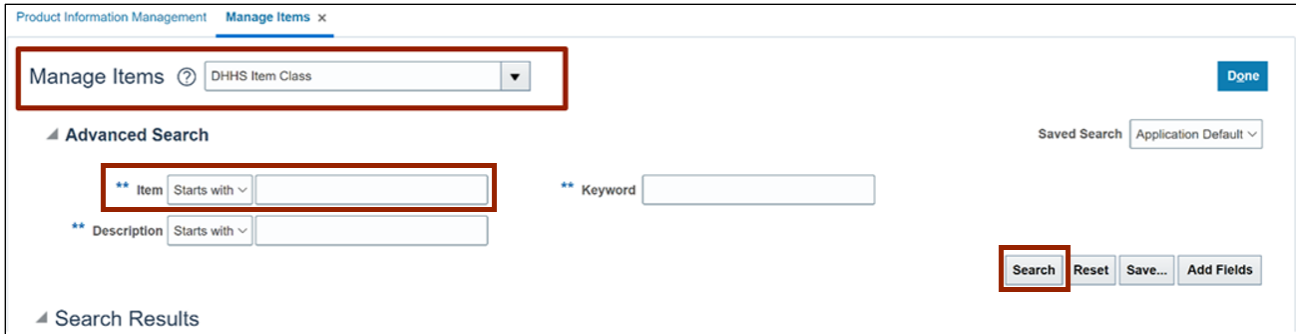


3. Click the **Tasks** [☰] icon. Under the **Item Management** section, click the **Manage Items** link.



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.



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

Advanced Search Saved Search

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
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

6. Click the **Associations** tab.

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

Edit Item: 3000822 (ITEMMASTERORG) Ⓞ ☆

Social Actions Save Cancel

No items to display

None +

Item 3000822

* Description SHOES, MEN'S, CANVAS, WHITE, LOW-CUT, SIZE 11

Item Class DHHS 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 11/17/22 4:36 AM

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

Formatted Description Long Description


7. Click the **Select and Add** [] icon.

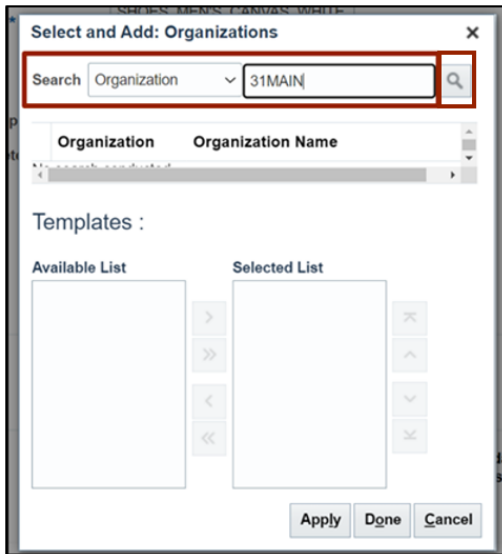
Overview Specifications Structures Attachments **Associations** Relationships Categories Quality

Organizations Supplier Organizations

Actions View Format [Select and Add] X Reassign Freeze Detach Wrap

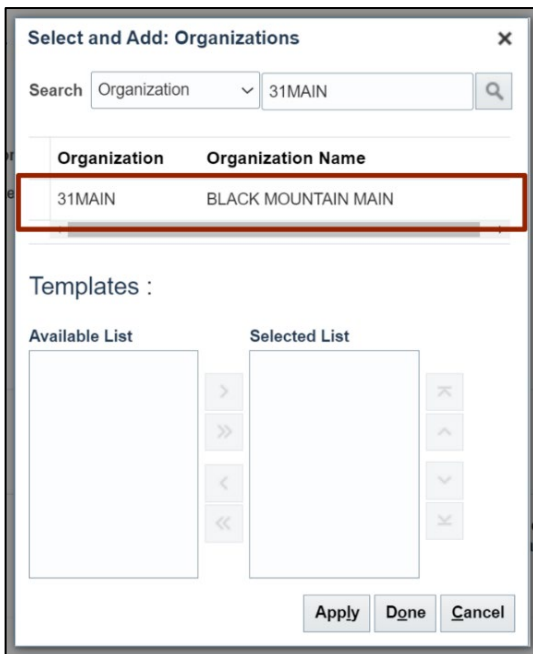
Organization	Organization Name	Item Status	* Primary Unit of Measure	Tracking Unit of Measure	Pricing	Secondary Unit of Measure	Defaulting Control	Positive Deviation Factor	Negative Deviation Factor
ITEMMASTER...	INVENTORY IT...	Active	PAIR	Primary	Primary	.		0	
3000DHHSNI	3000-DHHS-NO...	Active	PAIR	Primary	Primary	.		0	
37MAIN	BROUGHTON ...	Active	PAIR	Primary	Primary	.		0	

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

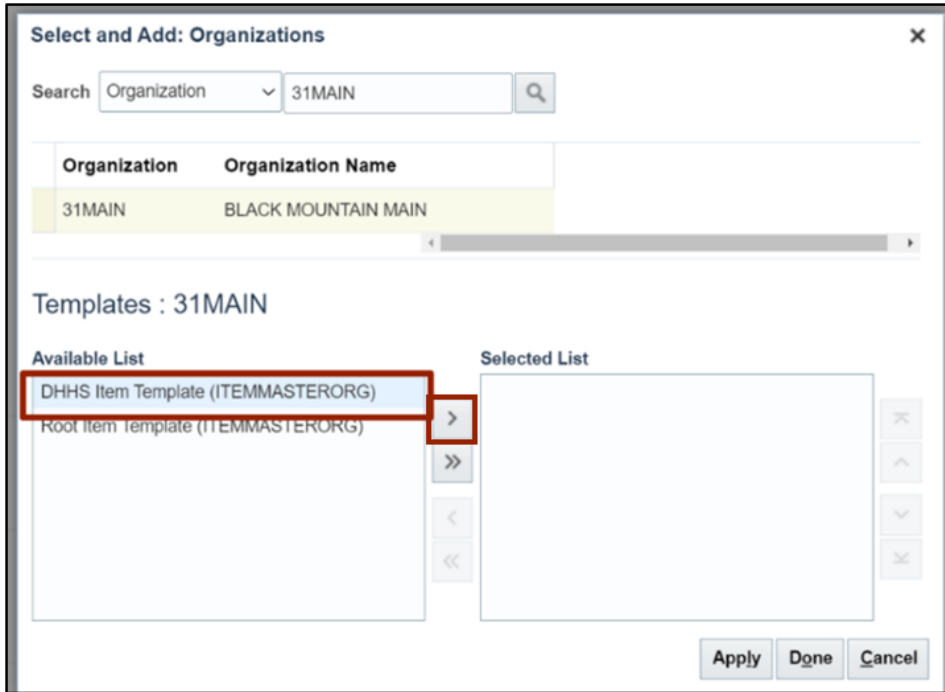


- Select the required **Organization**.

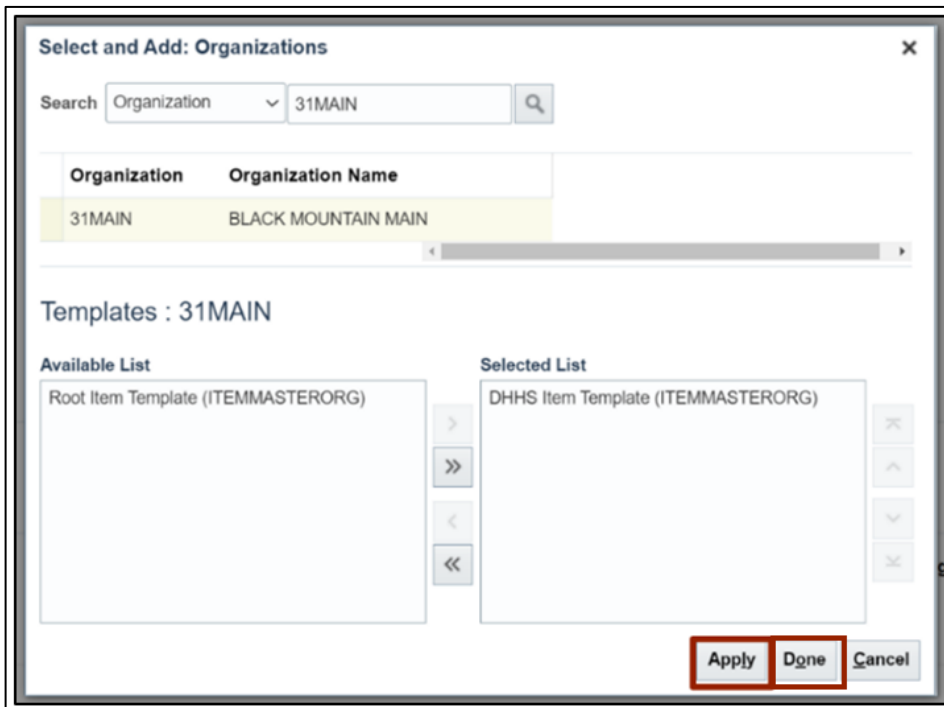
In this example, we choose **31MAIN**.



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



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



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.

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

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		

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

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

Item Structure ?

- Structure Item Type: Standard
- Create Configured Item: [Dropdown]
- Configurator Model Type: Standard
- Effectivity Control: Date
- Match Configuration: [Dropdown]

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

The screenshot shows the 'Specifications' tab for an item. The 'Item Organization' is set to 'Manufacturing'. Under the 'Item Structure' section, various configuration options are visible. The 'Inventory Asset Value' field is a dropdown menu currently set to 'No', which is highlighted with a red rectangular box. Other fields include 'Structure Item Type' (Standard), 'Base Model' (empty), 'Autocreated Configuration' (No), 'Pick Components' (No), 'Assemble to Order' (No), 'Standard Lot Size' (empty), 'Costing Enabled' (Yes), and 'Include in Rollup' (Yes).

15. Click the **Save** button.

The screenshot shows the 'Edit Item' page for item 3000822 (31MAIN). The 'Save' button is highlighted with a red rectangular box. The page displays item details: Item 3000822, Description 'SHOES, MEN'S, CANVAS, WHITE, LOW-CUT, SIZE 11', and Item Class 'DHHS Item Class'. Other fields include 'Item Status' (Active), 'Lifecycle Phase' (Production), and 'User Item Type' (Purchased Item). The top navigation bar shows 'Product Information Management' and 'Manage Items'.

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

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: [Dropdown]
- Configurator Model Type: Standard
- Effectivity Control: Date
- Match Configuration: [Dropdown]

Costing ?

- Costing Enabled: Yes
- Include in Rollup: Yes

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

Edit Item: 3000822 (3000DHHSNI) ?

Overview Specifications Structures Attachments Associations Relationships Categories Quality

Item Organization: Inventory ?

Material Control

- Item
 - Transactional Attributes
 - Additional Attributes
 - DHHS Additional Attributes
- Item Revision
 - Additional Attributes
- Item Organization
 - Manufacturing

Inventory Item: Yes

Stocked: No

Transaction Enabled: No

Reservable: Yes

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

The screenshot shows the 'Edit Item' interface for item 3000880 (3000DHHSNI). At the top right, there are 'Save' and 'Cancel' buttons. Below them, a dropdown menu is open, showing 'Save and Close' (highlighted with a red box) and 'Save to Change Order'. The main content area is titled 'Item Organization: Manufacturing' and includes an 'Item Structure' section with various configuration options like 'Structure Item Type', 'Create Configured Item', 'Configurator Model Type', 'Effectivity Control', and 'Match Configuration'. There are also options for 'Base Model', 'Autocreated Configuration', 'Pick Components', and 'Assemble to Order'.

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