



PLAN INVENTORY REPLENISHMENT

MFG

QUICK REFERENCE GUIDE

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.

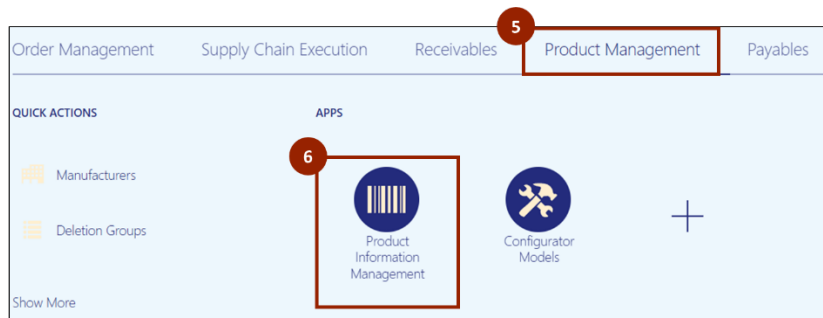
Plan Inventory Replenishment

Setting Items for the Min-Max Planning Report

1. Log in to the NCFS portal using the **Company Single Sign-On (SSO)** button.
2. Enter your **dac.nc.gov** email address.
3. Click **Next**, then enter your **password**.

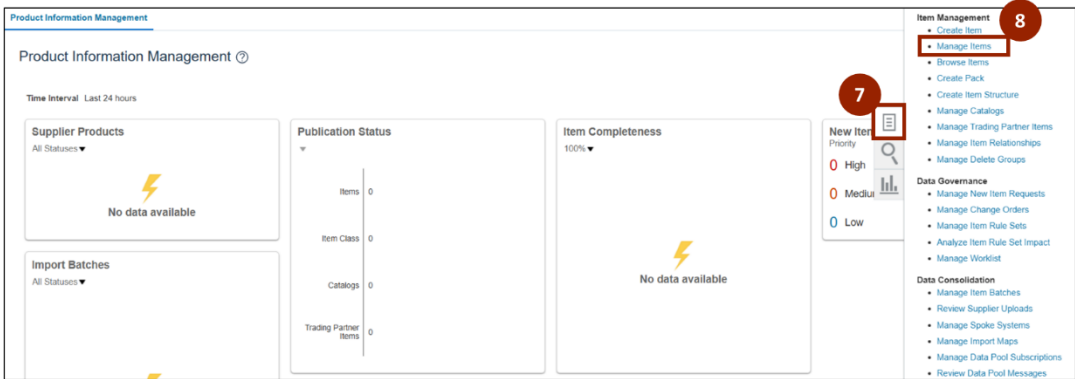
Note: The system will automatically sign on using SSO and log in to NCFS. After the first login using SSO, future access may not require credentials. If SSO is not available, enter credentials manually within the *Username* and *Password* fields, then click **Sign-In**.

4. Navigate to the **Home** page.
5. Click on the **Product Management** tab.
6. Click on **Product Information Management**.



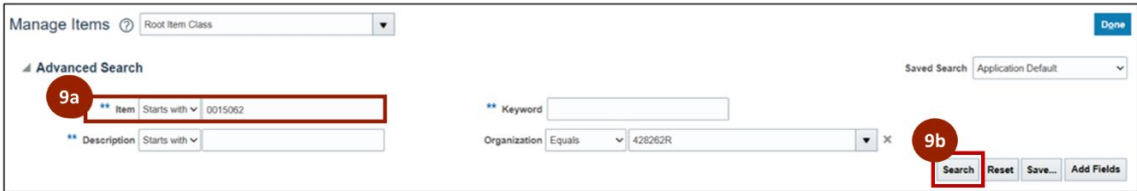
7. On the **Product Information Management** page, click the **Task** icon.

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



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.

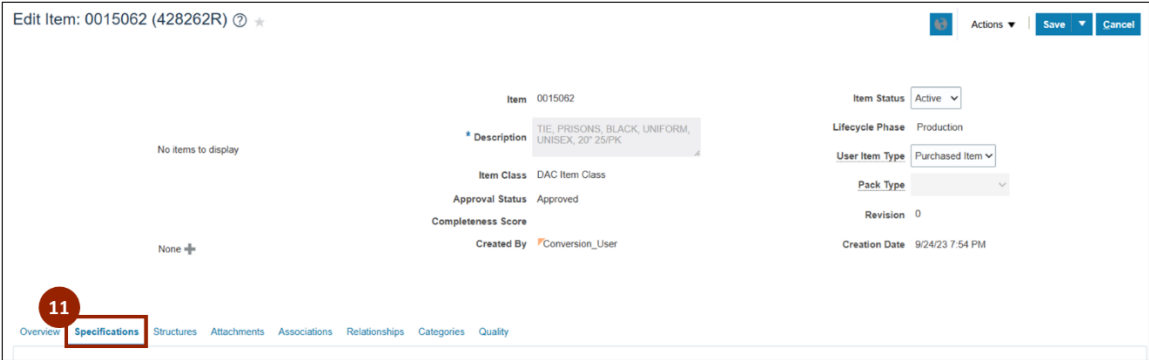


10. The *Search Results* table displays, click the desired **Item Number** link to open the **Edit Item** screen for that item.

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

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

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



12. Under the *Item Organization* header, Click **Planning**.

Overview Specifications Structures Attachments Associations Relationships Categories Quality

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

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

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

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.

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

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

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.

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

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.

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:

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.

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:

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

Actions

Save

Cancel

Printing the Min-Max Planning Report

Once logged in to NCFS, follow these steps:

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

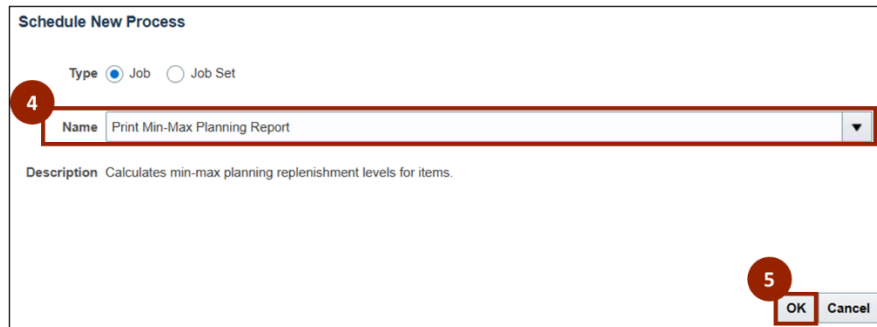
2. Click **Schedule Processes**.



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



4. In the **Name** field of the **Schedule New Processes** pop-up window, enter or search **Print Min-Max Planning Report**.
 5. Click **OK**.
- Note:** Once the appropriate **Job Name** is selected, the **Description** field automatically populates.



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.

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

6. In the *Organization* field, enter or search for the **appropriate organization** option (i.e., 428262R).
7. In the *Sort By* field, select **Inventory Item**.
8. In the *Planning Level* field, select **Organization**.
9. In the *Item Selection* field, select **All min-max planned items**.

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

6 * Organization: 428115R 7

* Sort By: Inventory item

From Item:

To Item:

8 * Planning Level: Organization 9

* Item Selection: All min-max planned items

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.

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

Process Details

This process will be queued up for submission at position 1

Process Options: **Submit** (11)

Name: Print Min-Max Planning Report

Description: Calculates min-max planning replenishment level...

Schedule: As soon as possible

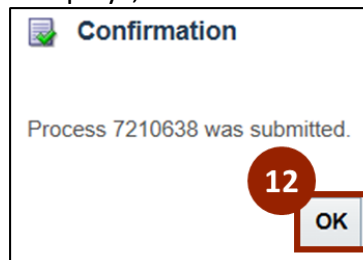
Submission Notes:

Basic Options

Parameters (10):

- * Restock: No
- Ship-to Location: [Dropdown]
- * 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: [Dropdown]
- To Category: [Dropdown]
- From Buyer: [Dropdown]

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



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

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

14. Click the **Republish** icon.

Scheduled Processes overview

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

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_J_7210638

Output

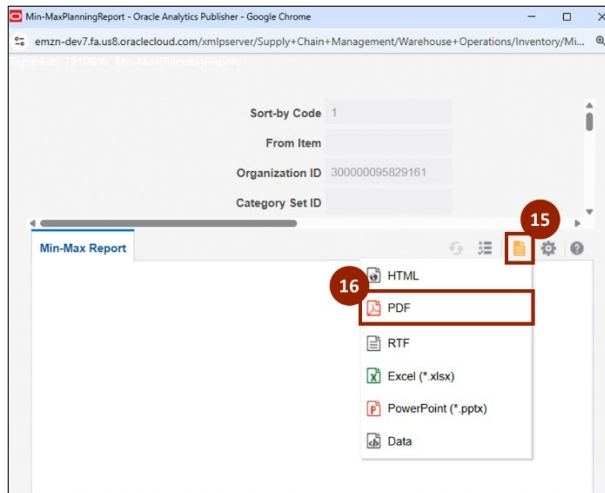
Output & Delivery

XML Data | Diagnostic Log | **Republish** (14)

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)		✓	

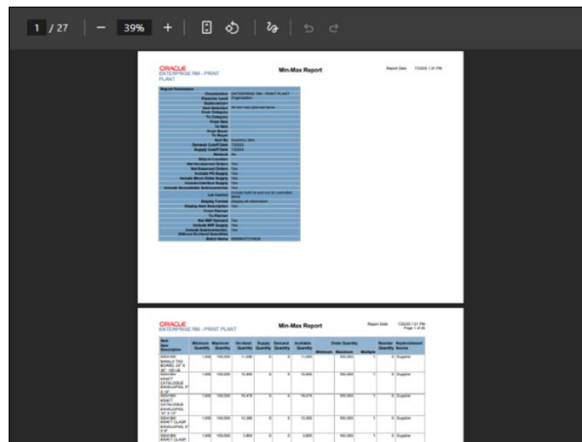
15. Within the **Min-Max Planning Report** window, Click the **View Report** icon.

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



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.



Wrap-Up

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

Additional Resources

Virtual Instructor Led Training (vILT)

- MFG108: Manage Inventory 1