



SET UP AND MAINTAIN ATP AND SOURCING RULES

MFG

QUICK REFERENCE GUIDE

Purpose

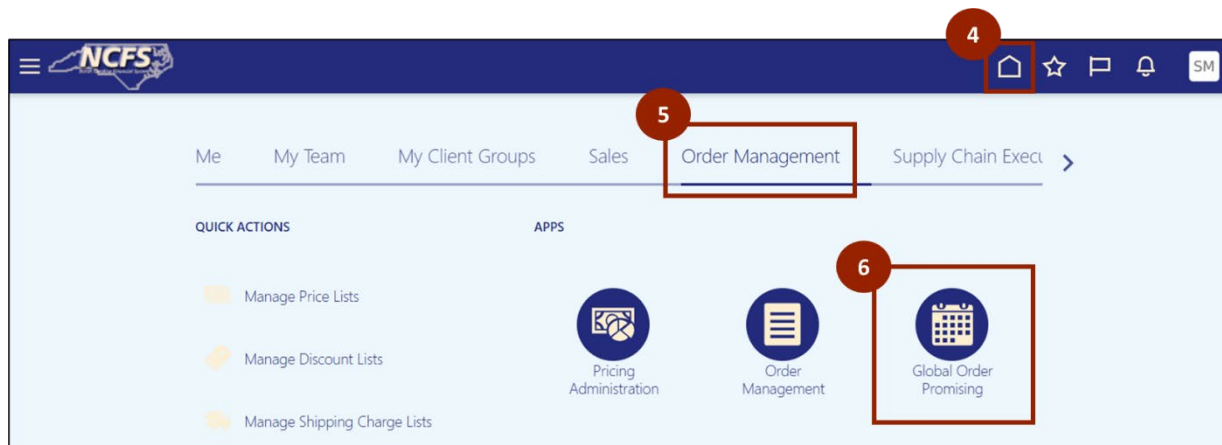
The purpose of this Quick Reference Guide (QRG) is to provide a step-by-step guide of how to **set up and maintain Available to Promise (ATP) and sourcing rules** in the North Carolina Financial System (NCFS).

Introduction and Overview

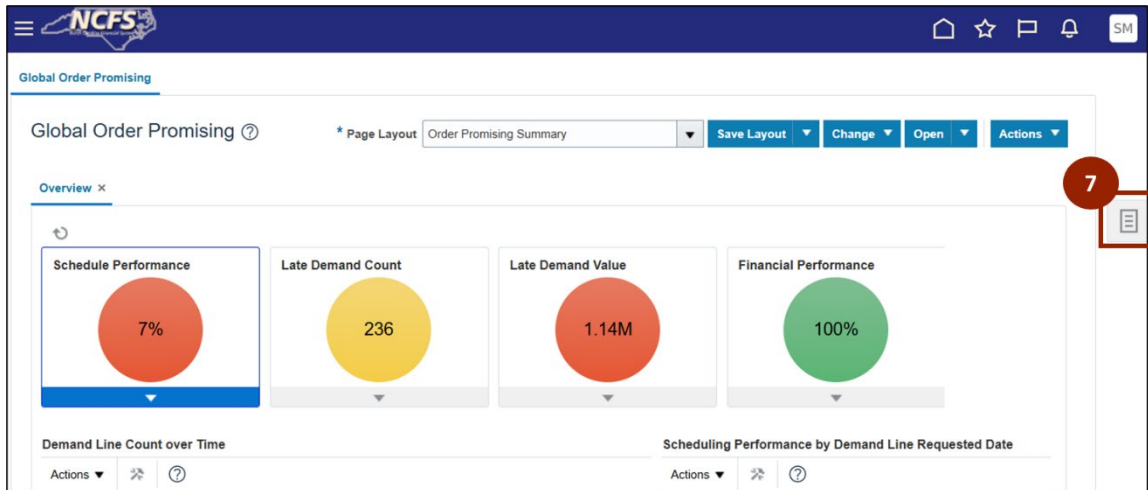
This QRG covers the process of setting up and managing local and global sourcing rules as well as ATP (Available to Promise) within NCFS.

Set Up and Maintain Sourcing Rules

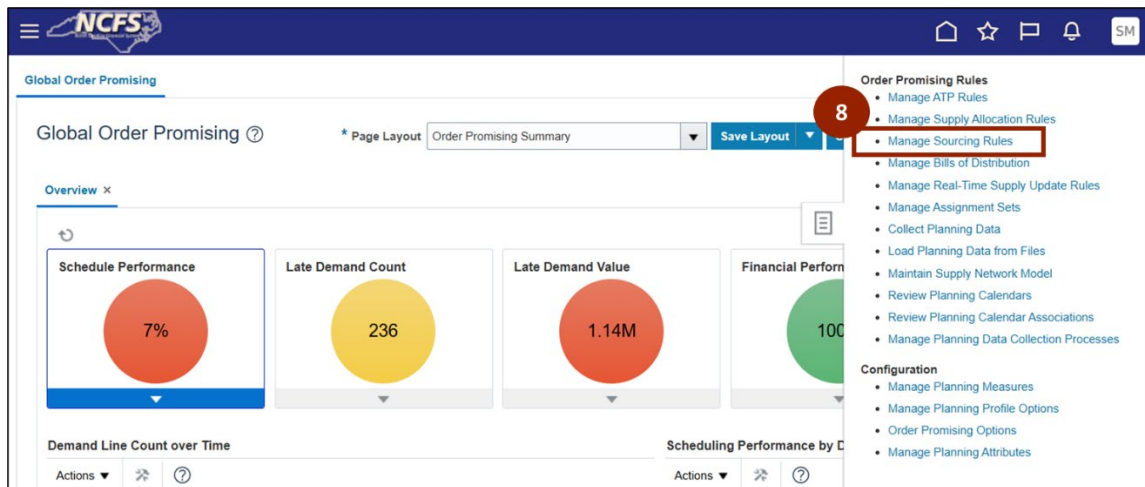
1. Click the **Company Single Sign-On (SSO)** button.
2. Enter your **dac.nc.gov** email address.
3. Click **Next**, then enter **password**.
4. Navigate to the **Home** page.
5. While on the **Home** screen, navigate to the **Order Management** tab.
6. In the **Order Management** tab, click on **Global Order Promising**.



7. Click the **Task** icon.

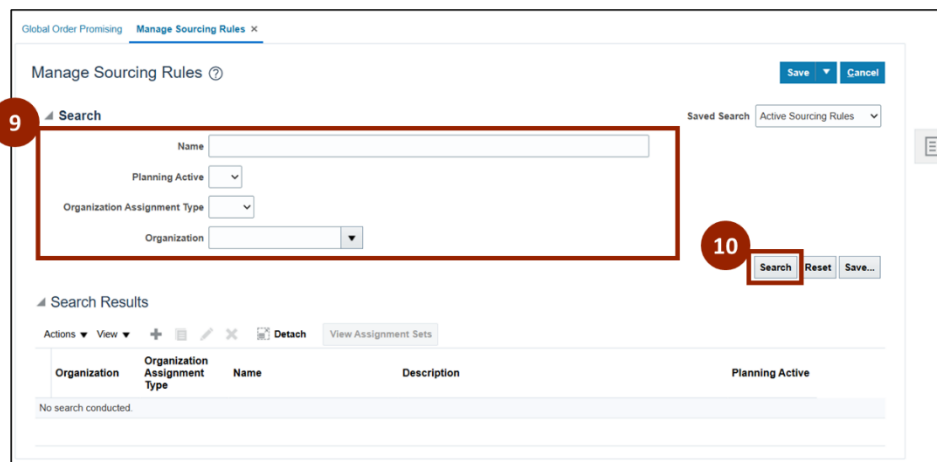


8. Click **Manage Sourcing Rules**.



9. In the *Search* section, enter **sourcing rule details** into the appropriate text entry fields.

10. Click the **Search** button.



11. Click on the **Global Rule** to manage (i.e., 428125R).

12. Click the **Edit (Pencil)** icon.

Manage Sourcing Rules ? Save Cancel

Search Saved Search Active Sourcing Rules

Search Results

Actions View + [Edit] X Detach View Assignment Sets

Organization	Organization Assignment Type	Name	Description	Planning Active
428136R	Local	NCCE Woodworking (428136R) Lo...	Local rule for Woodworking of North Carolina Correction Enterprise	Yes
428330R	Local	NCCE Fresh Produce (428330R) L...	Local rule for Fresh Produce Plant of North Carolina Correction Enterprise	Yes
428305R	Local	NCCE Meat Processing (428305R)...	Local rule for Meat Processing Plant of North Carolina Correction Enterpr...	Yes
428125R	Local	NCCE Braille Plant (428125R) Loc...	Local rule for Braille Plant of North Carolina Correction Enterprise	Yes
428170R	Local	NCCE Re-Upholstery (428170R) L...	Local rule for Re-Upholstery of North Carolina Correction Enterprise	Yes
428144R	Local	NCCE Columbus Sewing (428144...	Local rule for Columbus Sewing of North Carolina Correction Enterprise	Yes

13. Within the *Type* drop-down field, select the **new type**, if applicable (i.e., Make at).

14. In the *Allocation Percent* field, enter the **new allocation percentage**, if applicable (i.e., 100).

15. In the *Rank* field, enter the **new rank**, if applicable (i.e., 1).

16. Click **Save**.

Edit Sourcing Rule: NCCE Braille Plant (428125R) Local Rule ? Save Cancel

Name NCCE Braille Plant (428125R) Local Rule

Description Local rule for Braille Plant of North Carolina Correction Enterprise

☐ Enable for subinventory-level planning

Organization Assignment Type Local

Organization 428125R

☒ Planning active

Sourcing Rule Effective Dates

Actions View + X Detach

Start Date End Date

6/16/25 m/d/yyyy

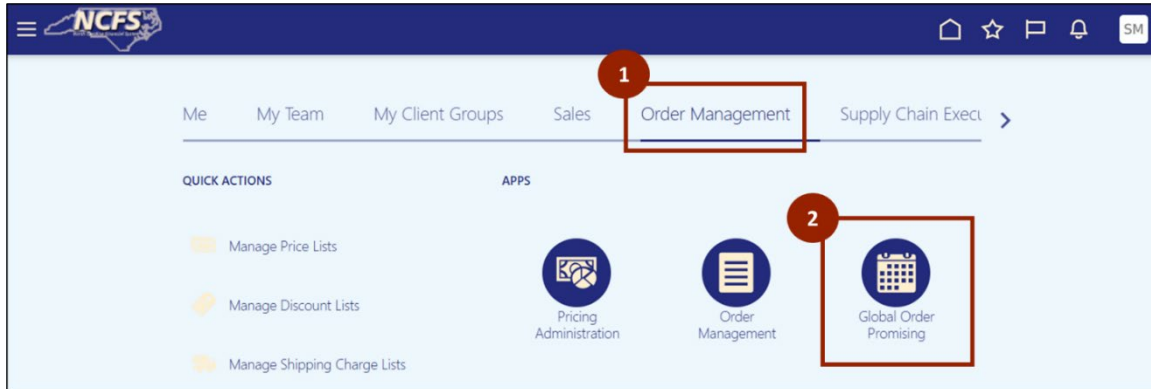
Effective Start Date 6/16/25: Sources ?

Actions View Format + X Freeze Detach Wrap Copy Sources

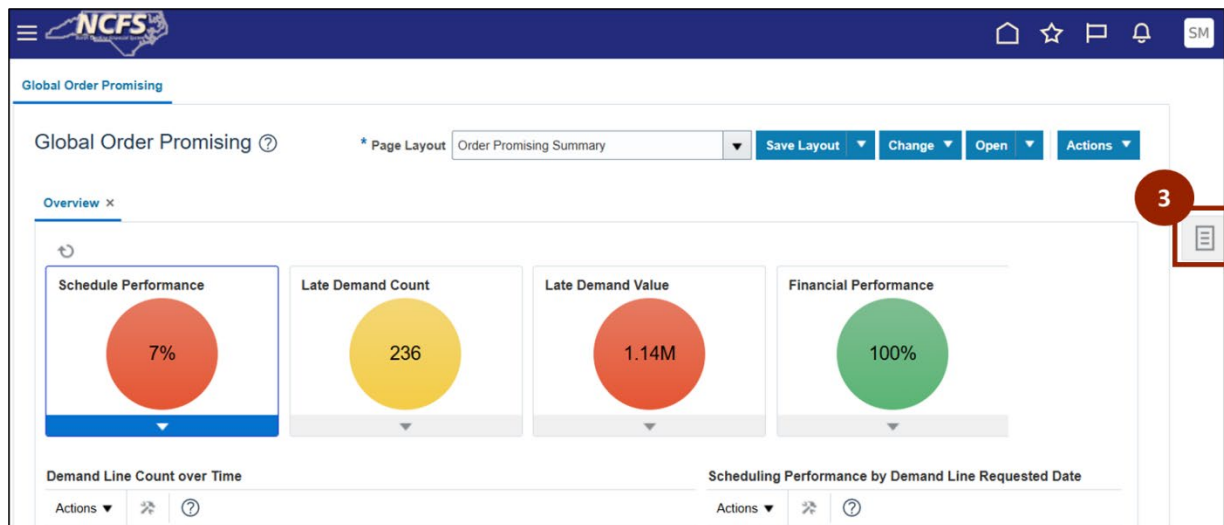
Type	Organization	Supplier	Supplier Site	Supplier Site Source System	* Allocation Percent	* Rank	Shipping Method	Carrier Name	Mode of Transport	Service Level
Make at	428125R				100	1				

Set Up and Maintain ATP Rules

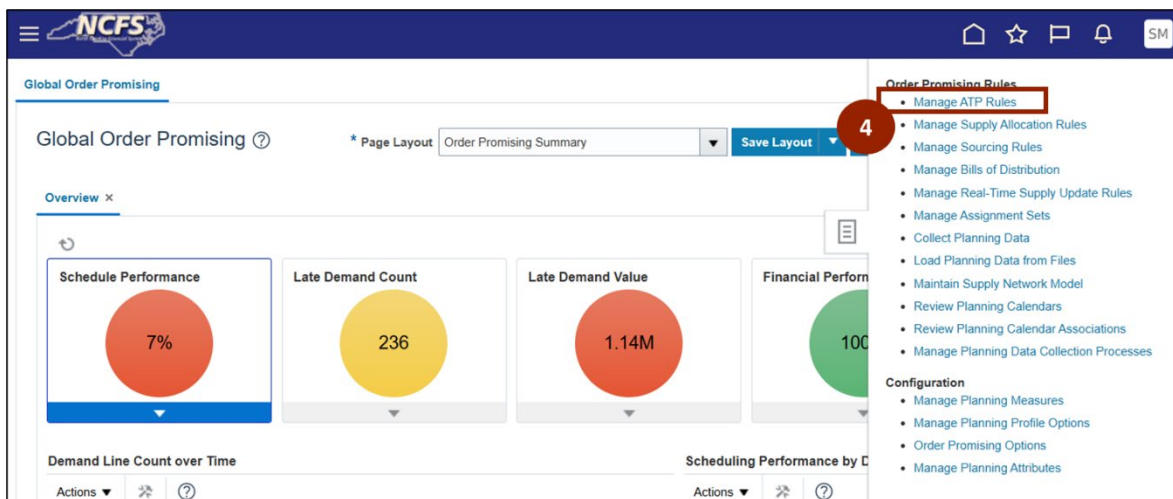
1. On the **Home** page, Select **Order Management**.
2. Within the **Apps** tab, select **Global Order Promising**.



3. Click the **Task** icon.



4. Click on the **Manage ATP Rules**.



5. In the **Manage ATP Rules** screen, click the **Search** button.

Note: Any of the fields within the *Search* section may be populated to narrow down the search results.

Global Order Promising Manage ATP Rules x

Manage ATP Rules ? Done

Search

Name Starts with [] Assigned-to Organization Equals [] Saved Search Application Default v

Description Starts with [] Assigned-to Item Category Equals []

Assigned-to Item Equals []

5 Search Reset Save...

Search Results

Actions View Format + [] [] [] [] Freeze Detach Wrap

6. From the *Search Results*, select the desired **NCCE ATP Rule** row.

7. Click the **Edit (Pencil)** icon.

Manage ATP Rules ?

Search

Search Results

7

6

Actions View Format + [] [] [] [] Freeze Detach Wrap

Name	Description	Assigned-to Item	Assigned-to Organization	Assigned-to Item Category
NCCE ATP Rules	ATP Rules for N...		428105R	
NCCE ATP Rules	ATP Rules for N...		428149R	
NCCE ATP Rules	ATP Rules for N...		428180R	
NCCE ATP Rules	ATP Rules for N...		428130R	
NCCE ATP Rules	ATP Rules for N...		428125R	
NCCE ATP Rules	ATP Rules for N...		428123R	
NCCE ATP Rules	ATP Rules for N...		428260R	
NCCE ATP Rules	ATP Rules for N...		428305R	

8. In the *Supply Types* area, the system includes the following:

- Criteria include promising and supply chain attributes.
- System searches all relevant supply types.
- Considers on-hand inventory, sales orders, and work orders.
- Updates sales order with accurate availability.

Edit ATP Rule: NCCE ATP Rules ?

* Name: NCCE ATP Rules

Description: ATP Rules for North Carolina Correction Enterprises

ATP Rule Criteria | ATP Rule Assignment

Promising Attributes ?

Promising Mode: ☒ Supply chain availability search ☐ Lead time based ☐ Infinite availability based

☒ Search components and resources ☐ Lead Time Considered

☒ Enable profitable to promise search ☐ User-Defined Lead Time in Days

☒ Respect allocation constraints ☐ Truncate order fulfillment quantity to nearest integer

☒ Split order when supply becomes available ☐ Minimum Quantity for Splitting: 1

Supply Chain Availability Search Attributes ?

Supply Types: ☒ On hand ☐ Purchase orders ☐ Supplier requisitions

Demand Types: ☒ Fulfillment lines ☐ Dependent work order demands ☒ Planned order demands

Infinite Availability Time Fence Definition:

User-Defined Fence in Days:

Past Due Supply and Demand Definition:

9. Select the **ATP Rule Assignment** Tab.

- ATP rule assignment links rules to organizations.
- Assignment can be set at organization, item, or item category level.
- For DAC, rules are assigned at the organization (plant) level.
- Each plant uses its assigned ATP rule during order creation

Edit ATP Rule: NCCE ATP Rules ?

* Name: NCCE ATP Rules

Description: ATP Rules for North Carolina Correction Enterprises

ATP Rule Criteria | ATP Rule Assignment

10. How ATP and sourcing rules work together:

- ATP rule determines when an item can be promised.
- Sourcing rules decide if the item is manufactured or shipped from stock.
- Sales order displays both promise date and fulfillment method.
- Two key sections in the sales order reflect these processes.

10

Edit ATP Rule: NCCE ATP Rules ?

Save Save and Close Cancel

* Name: NCCE ATP Rules

Description: ATP Rules for North Carolina Correction Enterprises

ATP Rule Criteria ATP Rule Assignment

ATP Rule Assignment ?

Actions View Format + X [icon] [icon] Freeze Detach Wrap

Assignment Basis	Assigned-to Organization	Assigned-to Item	Assigned-to Item Category
Organization	428105R	-	-
Organization	428115R	-	-
Organization	428180R	-	-

Wrap-Up

NCFS users can **set up and maintain ATP and sourcing rules** using the steps above.

Additional Resources

Instructor Led Training (ILT)

- MFG117 – Maintain Global Order Promising