INV-08 Associate New Items to Inventory Orgs

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.

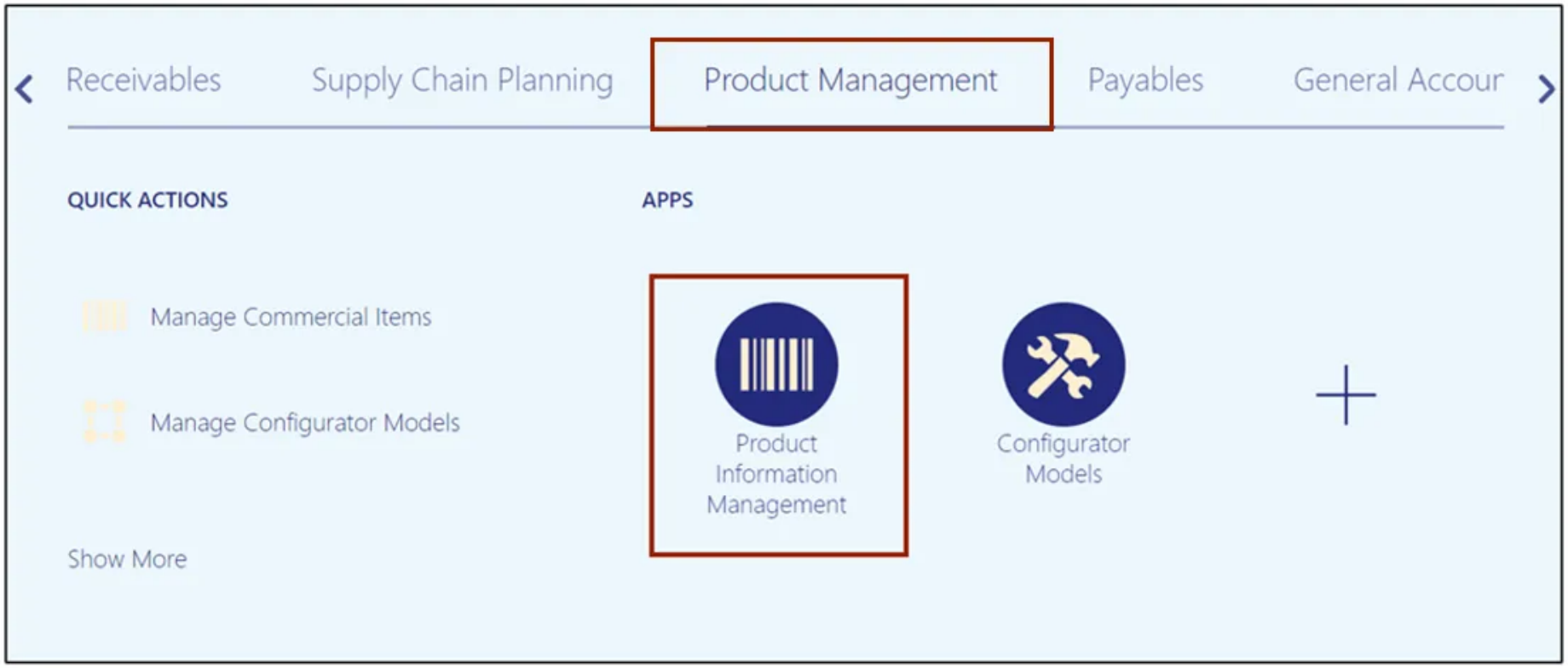
Associate New Items to Inventory Orgs

To associate new items to inventory orgs in NCFS, please follow the steps below. There are 18 steps to complete this process.

Step 1. Log in to the NCFS with your credentials to access the system.

Step 2. On the **Home** page, under the **Product Management** tab, click the **Product Information Management** app.

Image



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

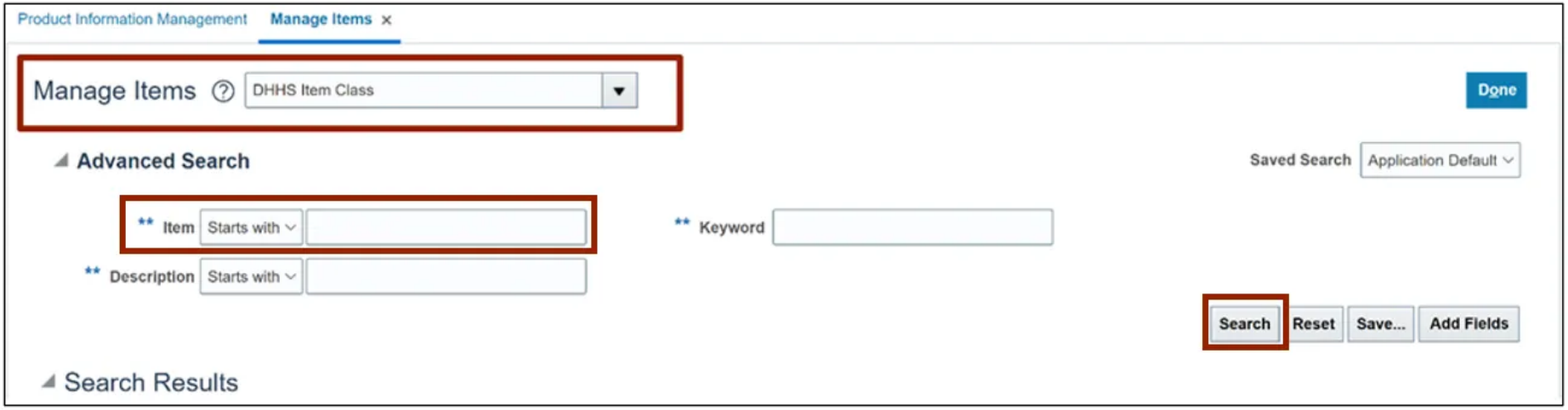
Image



Step 4. Select the required **Root Item class**.

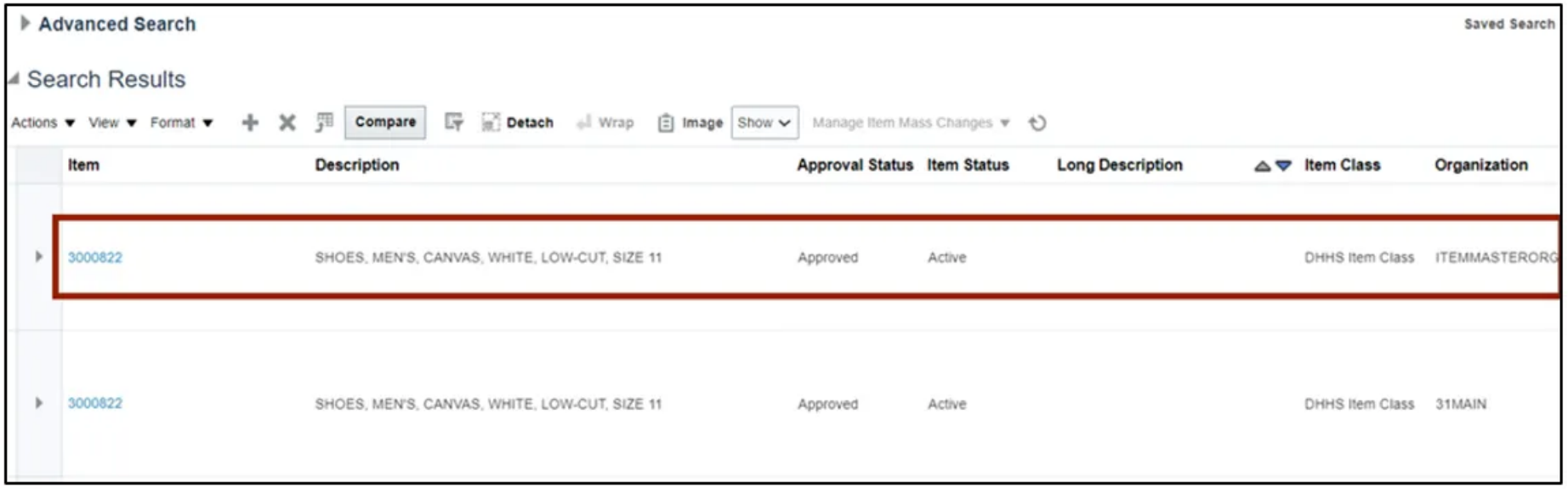
In this example, we choose **DHSS Item Class**. In the **Advanced Search** section, enter the **Item** number. In this example, we choose **3000822**. Click the **Search** button.

Image



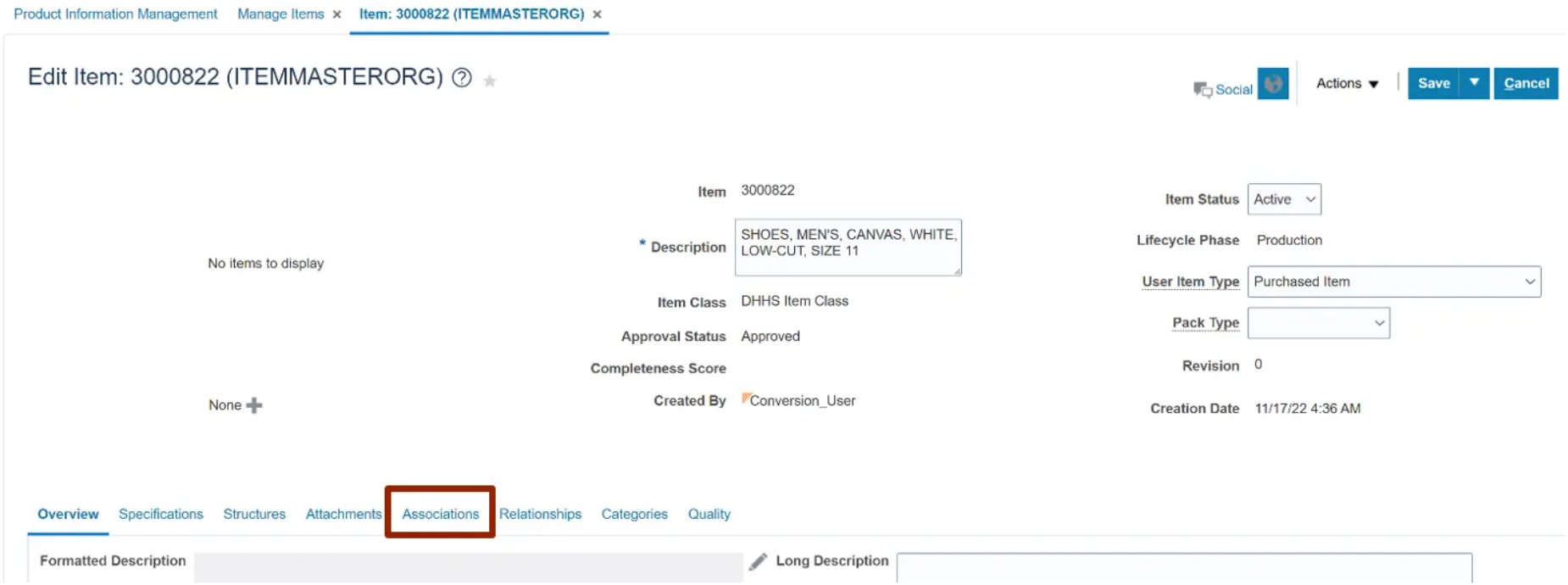
Step 5. Click the **3000822** link in the **Item** column with **Organization** as **ITEMMASTERORG**.

Image



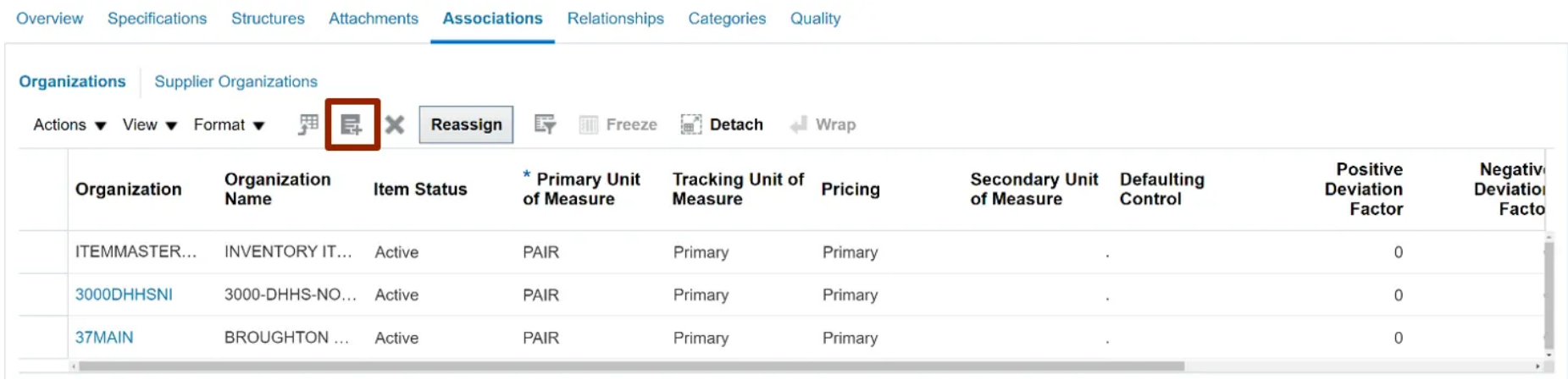
Step 6. Click the **Associations** tab.

Image



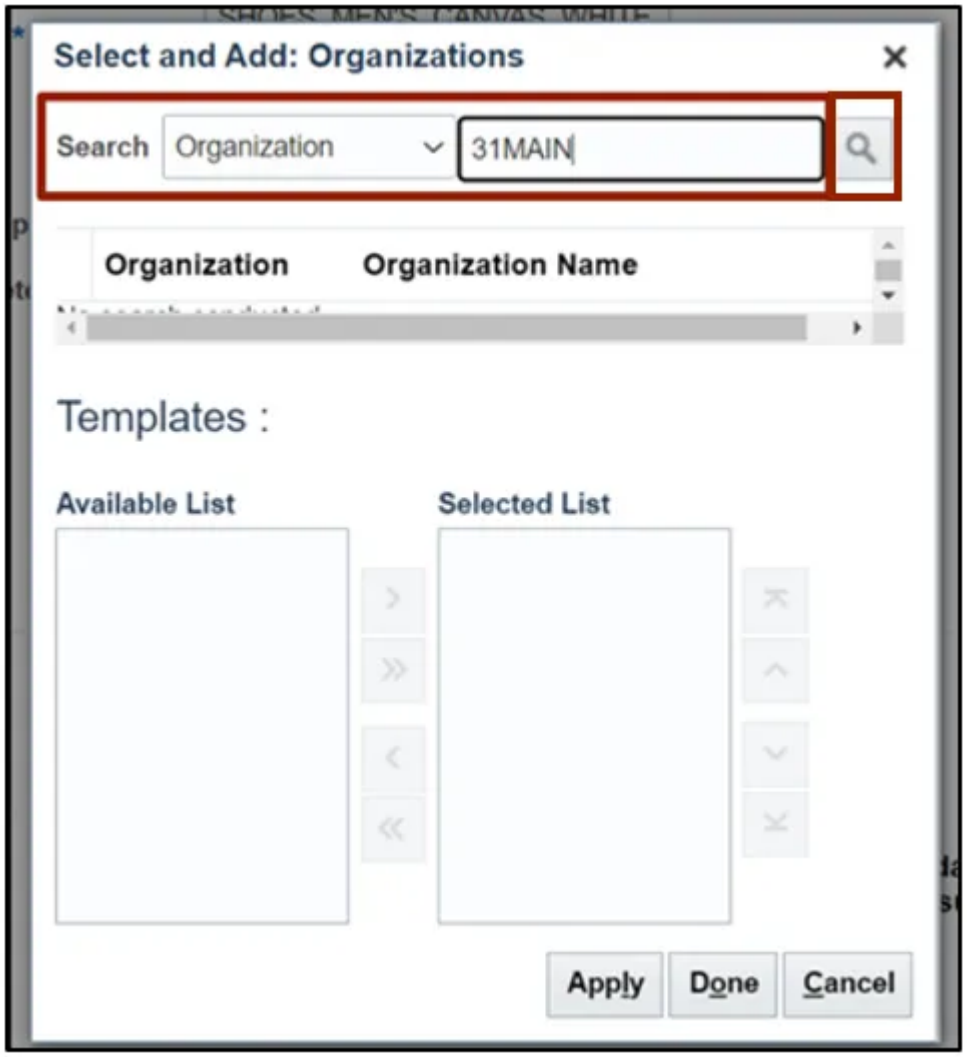
Step 7. Click the **Select and Add** icon.

Image



Step 8. The *Select and Add: Organizations* pop-up appears. Enter the **Organization** details and Click the **Search** icon.

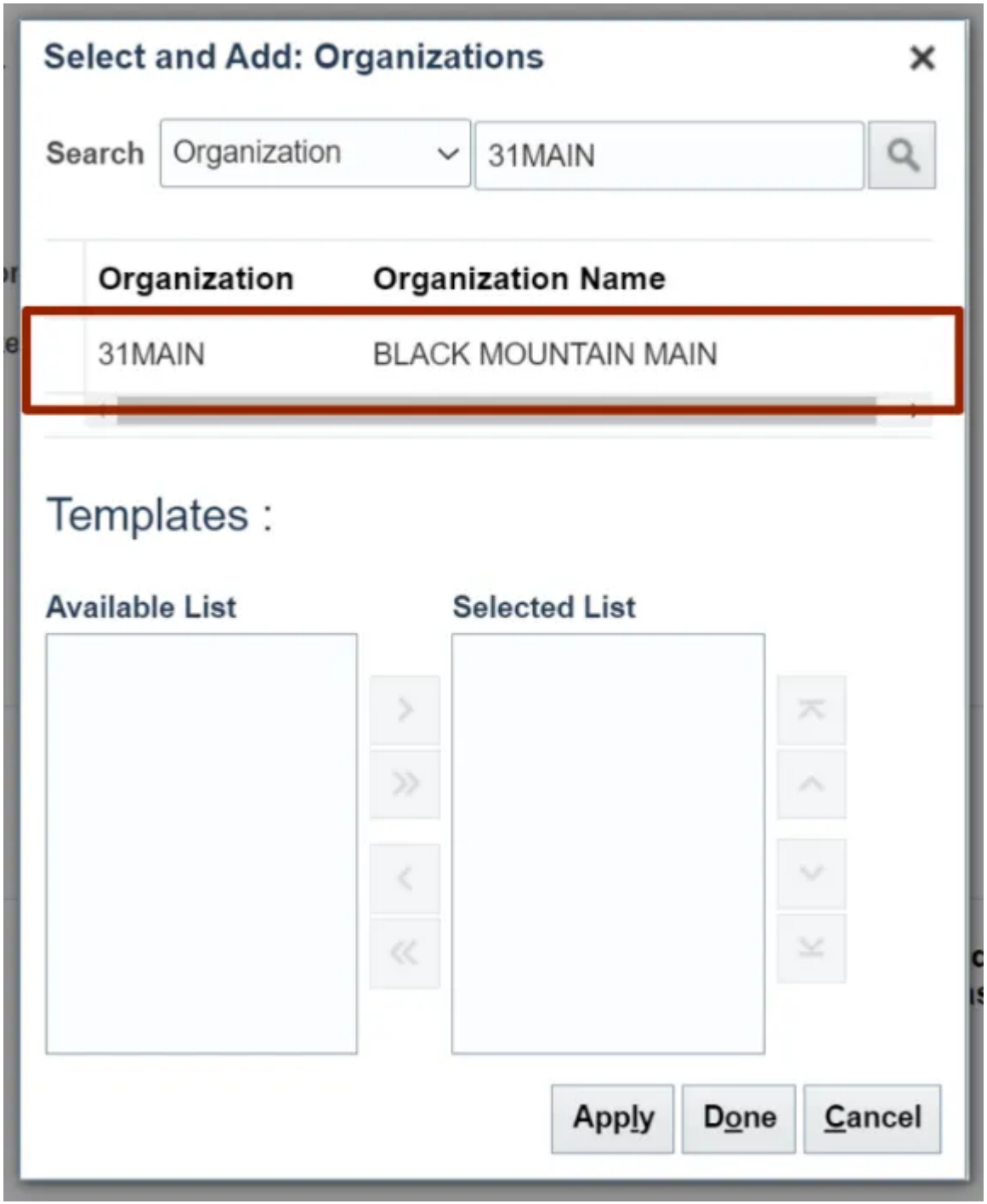
Image



Step 9. Select the required **Organization**.

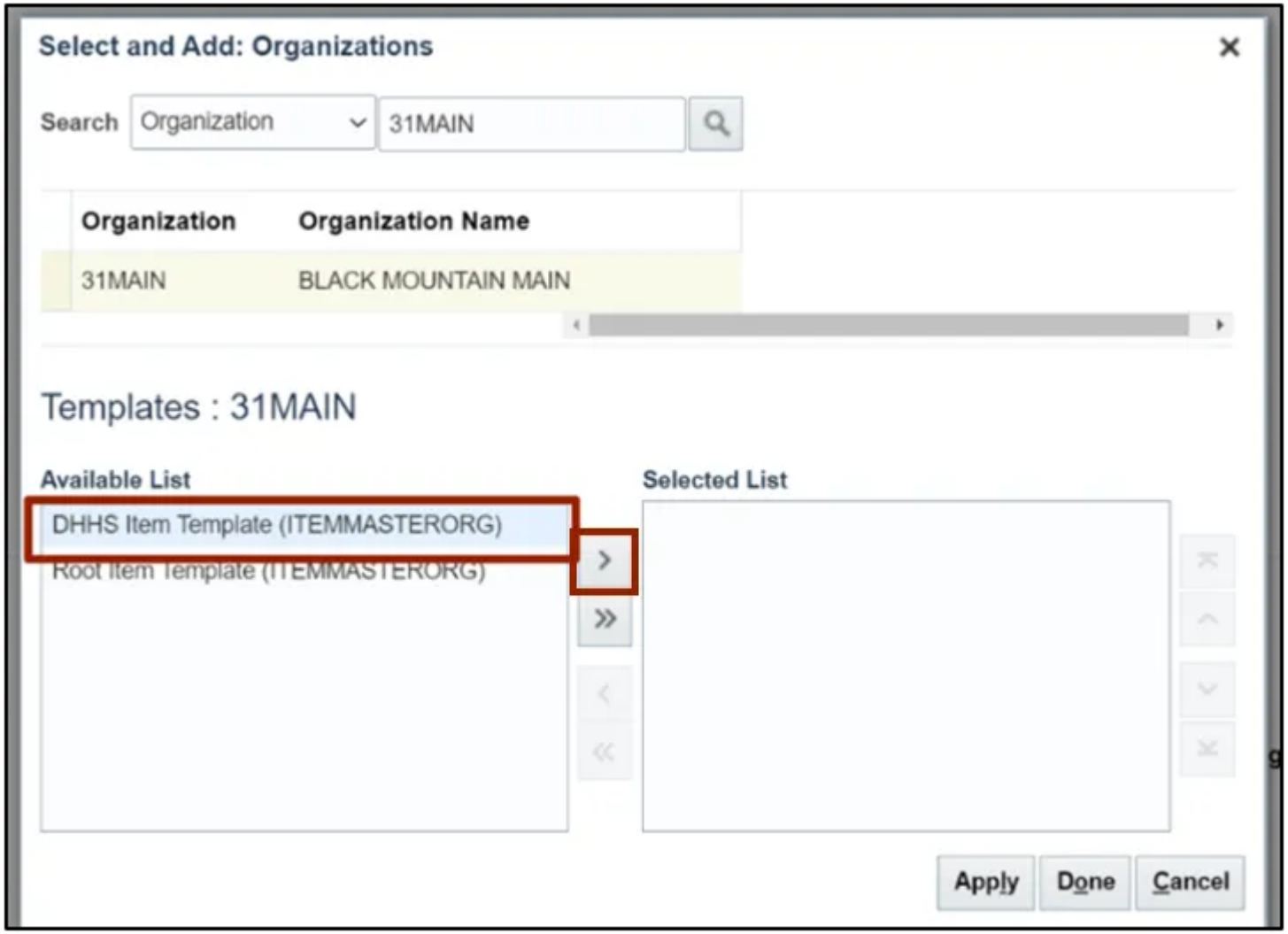
In this example, we choose **31MAIN**.

Image


Select and Add: Organizations
Search
Organization
31MAIN
Organization
Organization Name
31MAIN
BLACK MOUNTAIN MAIN
Templates :
Available List
Selected List
Apply
Done
Cancel

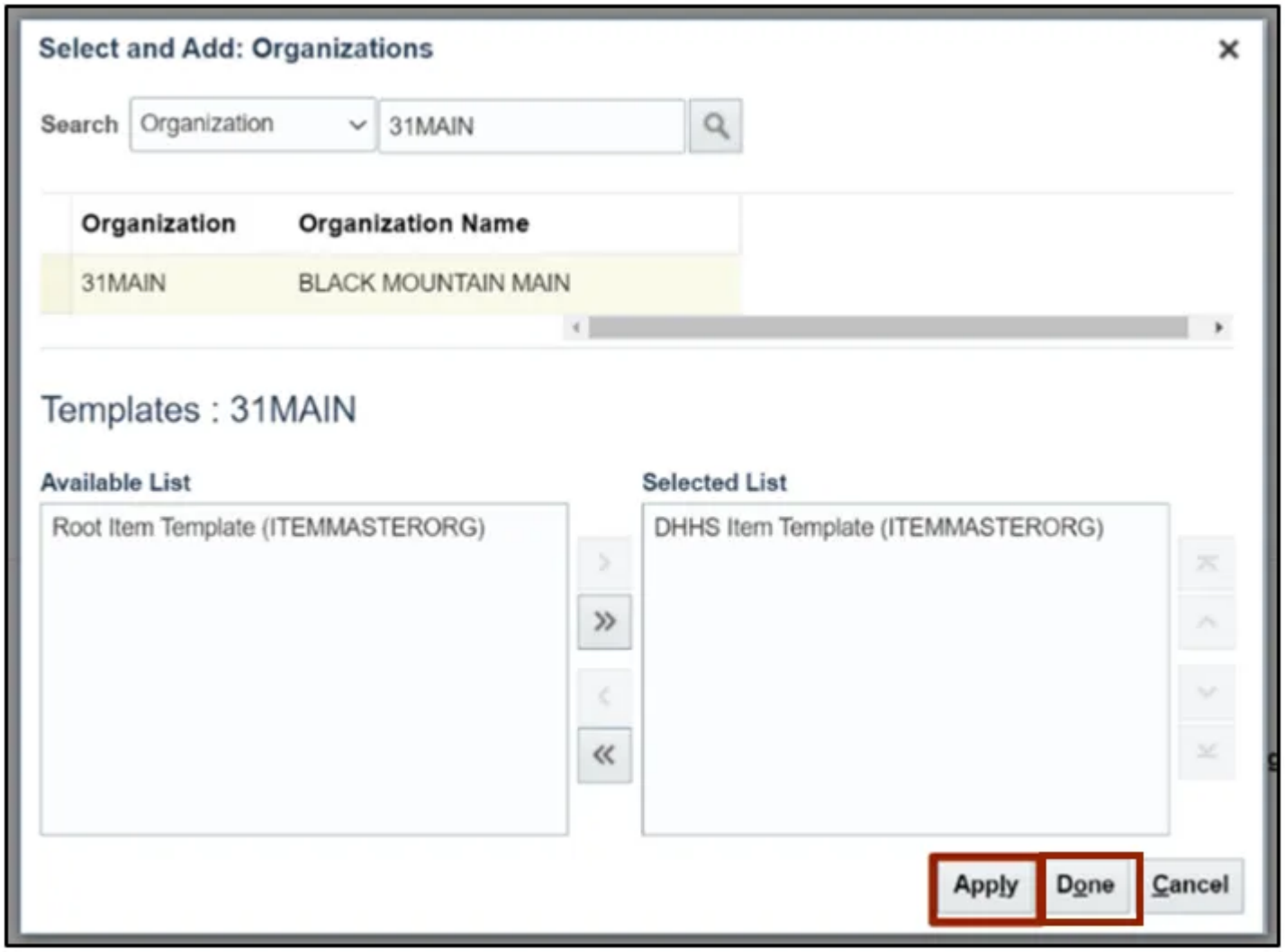
Step 10. Select the appropriate **Template** to be applied as per the Business requirement. Click the **Select** icon.

Image



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

Image

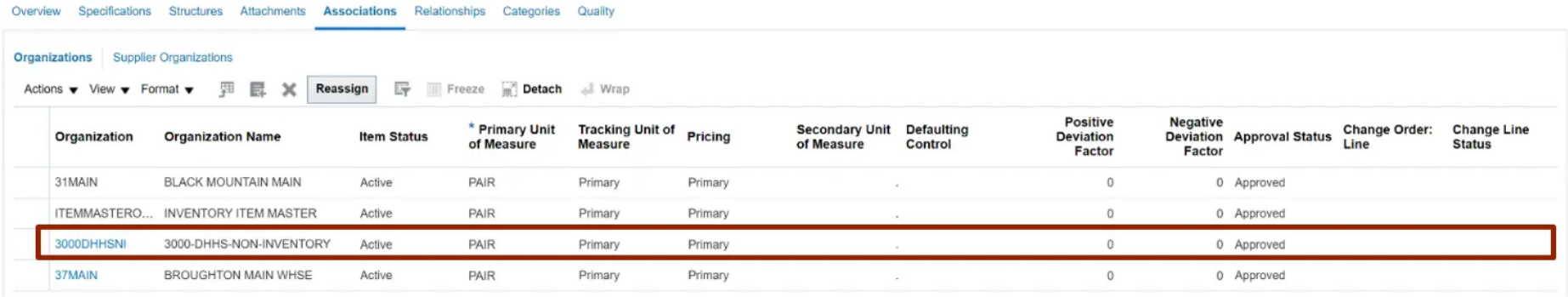


Associate New Items to Non-Inventory Organization

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.

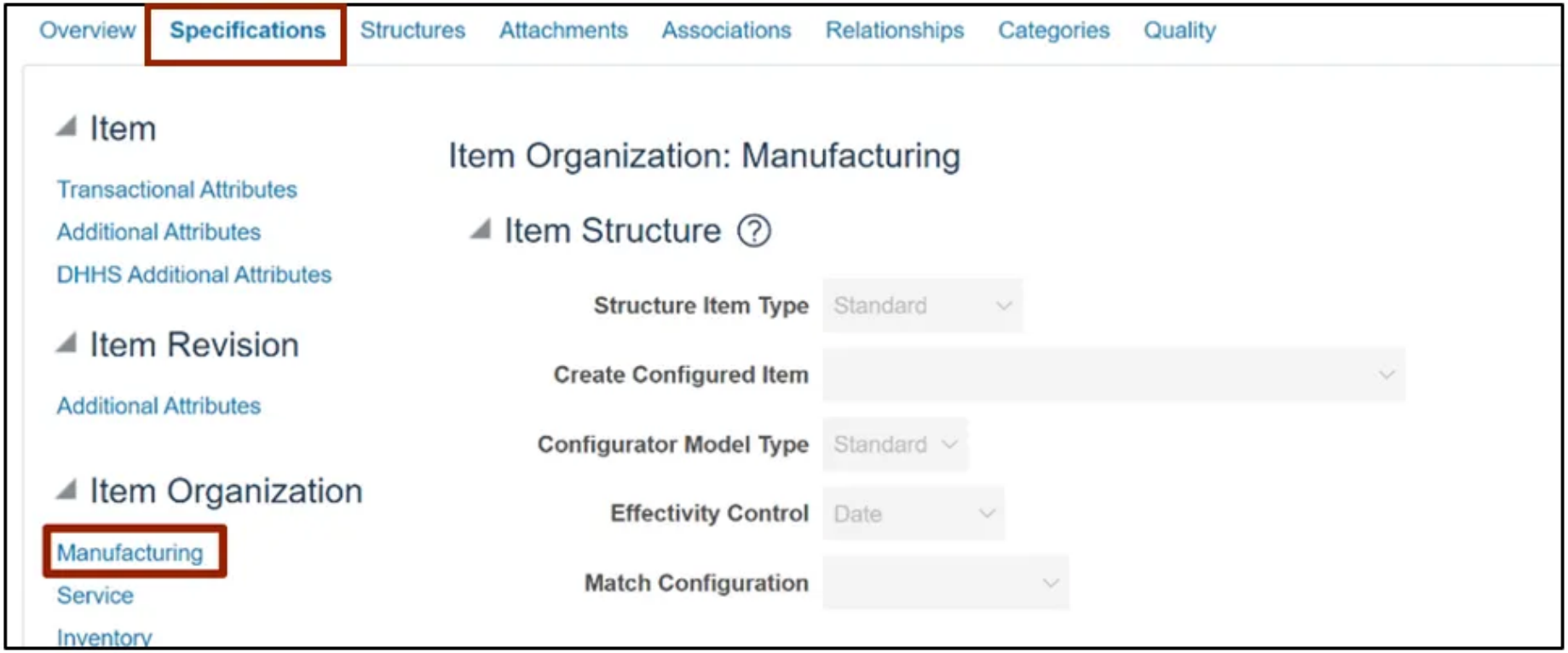
Step 12. On the **Associations** tab, click the item **3000822** link for Non-Inventory Organization.

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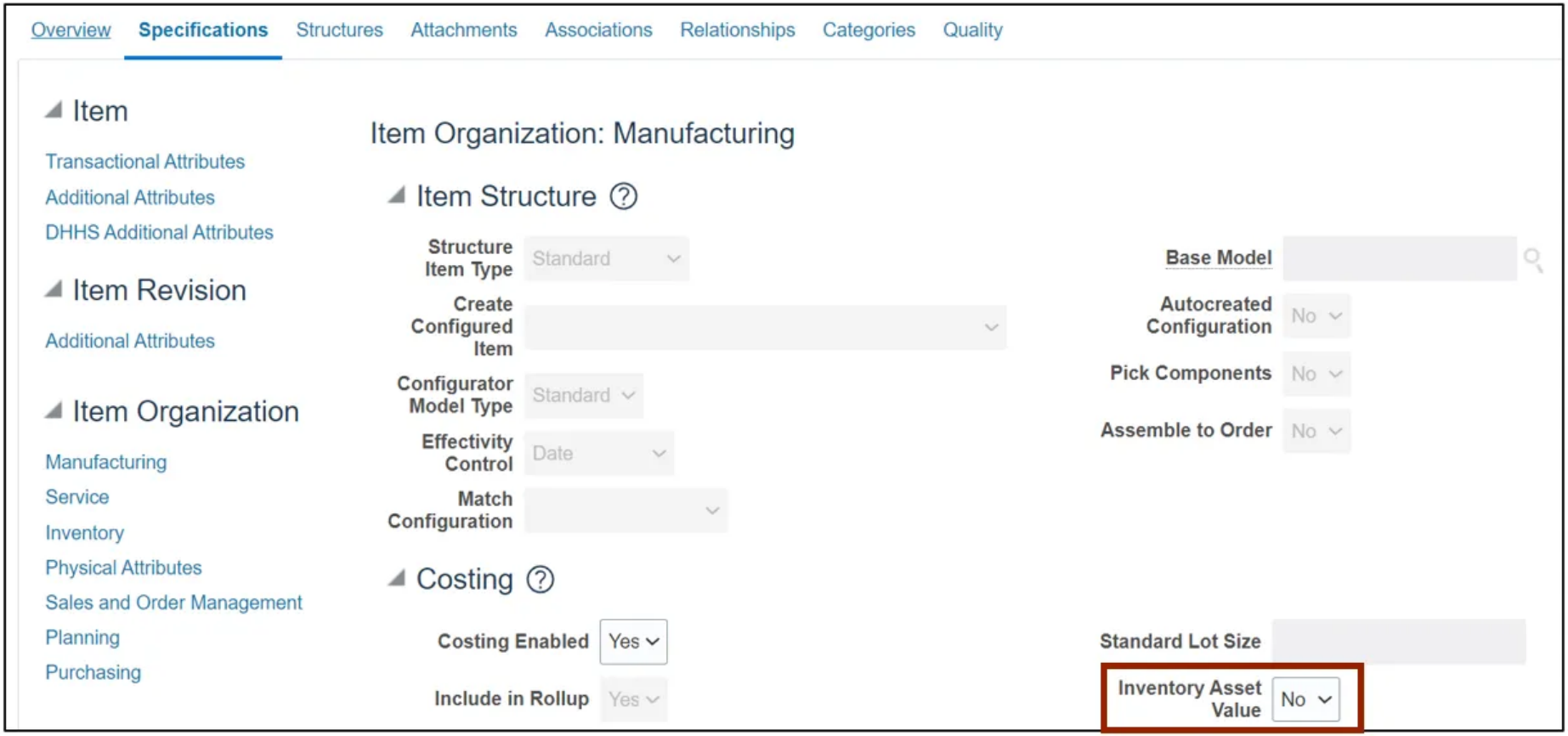
Step 13. Click the **Specifications** tab. In the **Item Organization** section, click **Manufacturing**.

Image



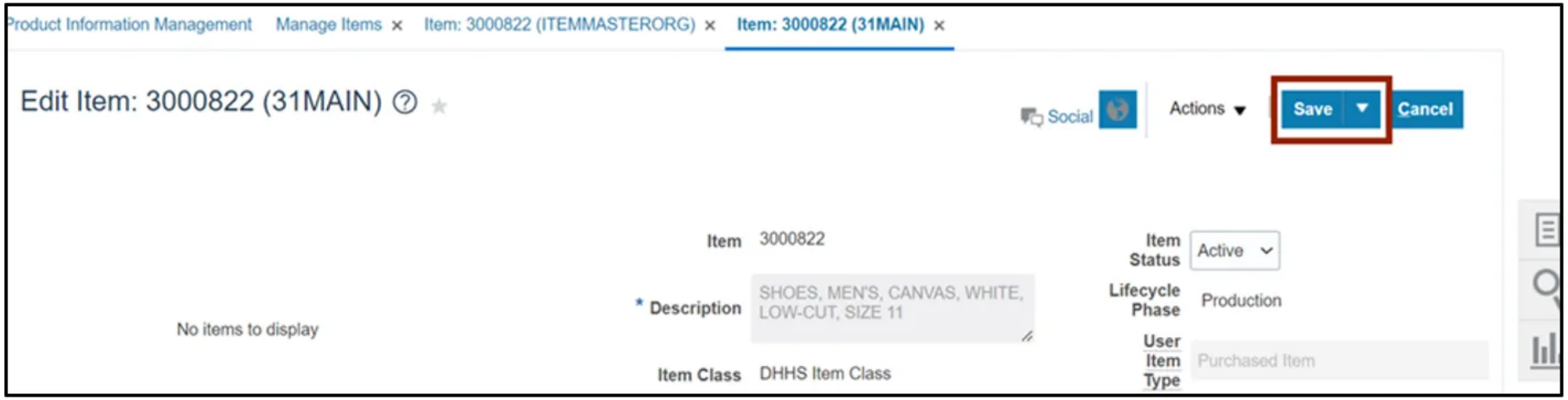
Step 14. Update the **Inventory Asset Value** field as **No**.

Image



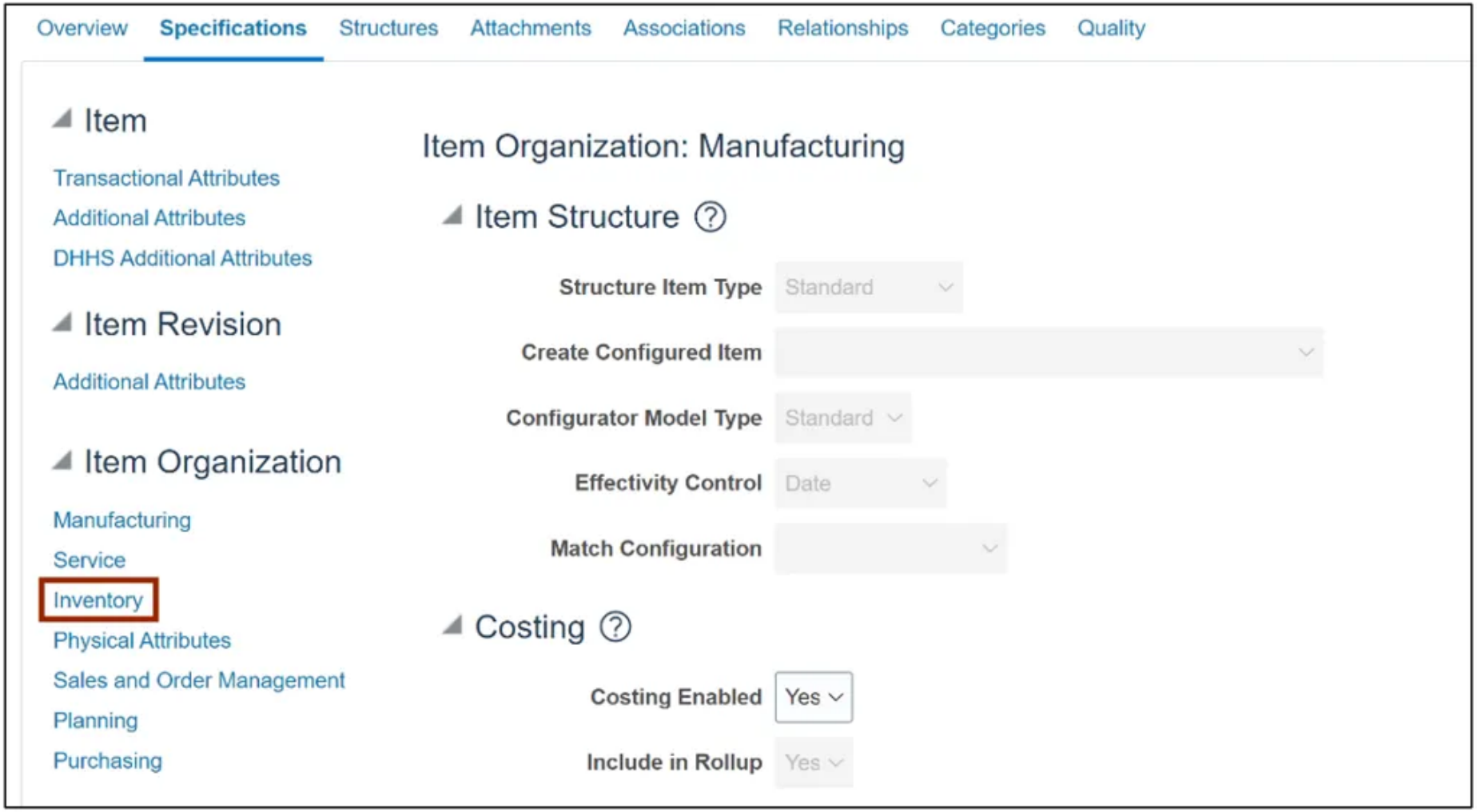
Step 15. Click the **Save** button.

Image



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

Image



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

Image

Edit Item: 3000822 (3000DHHSNI)

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

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 Organization: Inventory

Material Control

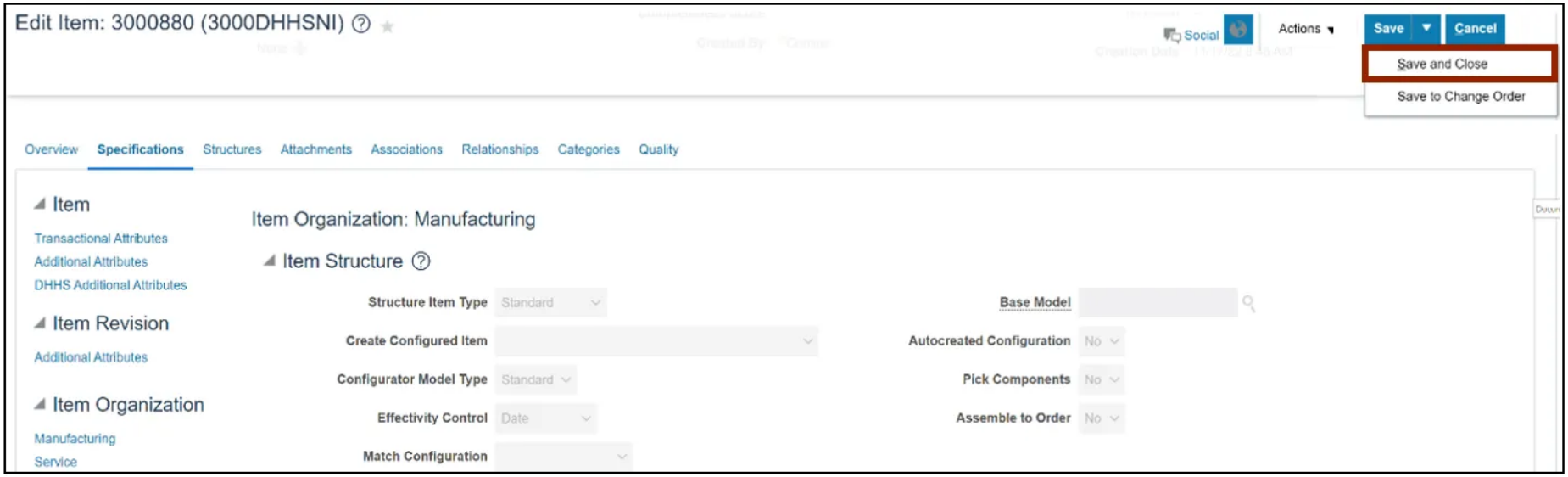
Inventory Item Yes
Stocked No
Transaction Enabled No
Reservable Yes

Lot

Control No lot control
Starting Prefix

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

Image



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

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