MFG-26 Set-up and Maintain ATP and Sourcing Rules

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

There are 16 steps to complete this process.

Step 1. Click the **Company Single Sign-On (SSO)** button.

Step 2. Enter your **@dac.nc.gov** email address.

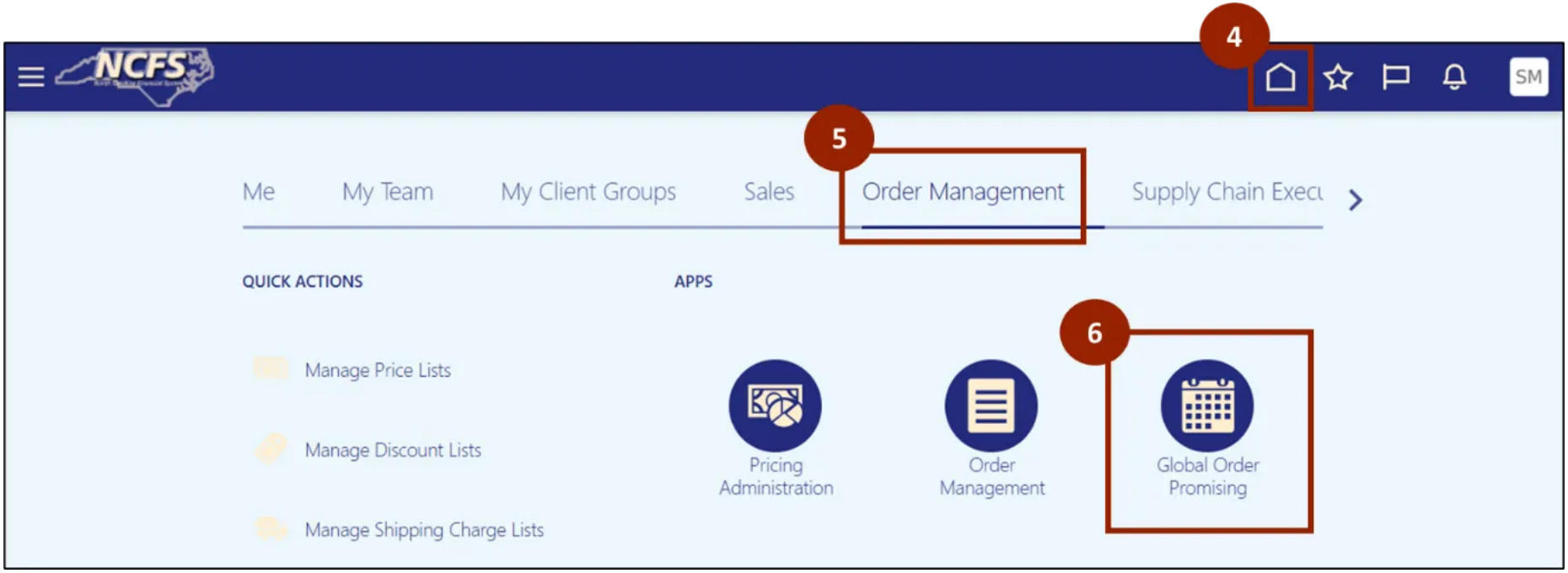
Step 3. Click **Next**, then enter **password**.

Step 4. Navigate to the Home page.

Step 5. While on the Home screen, navigate to the **Order Management** tab.

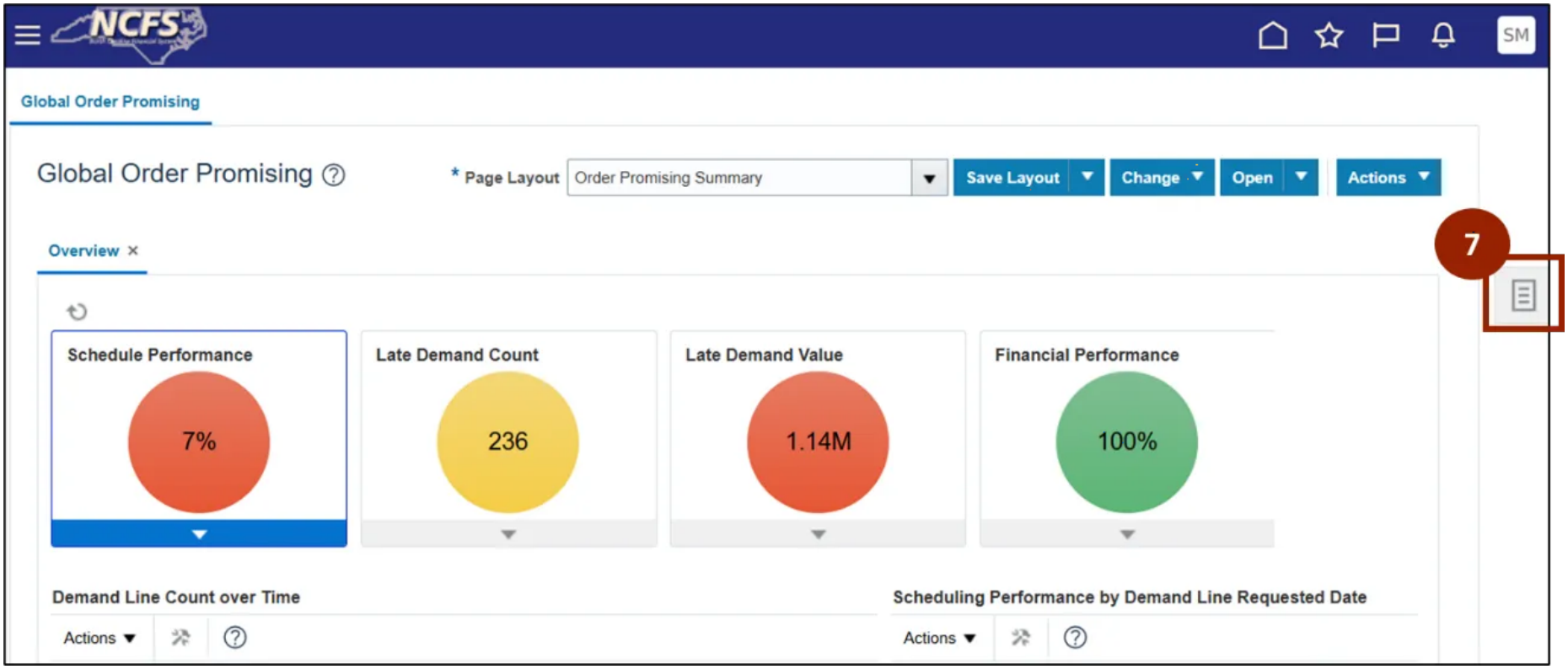
Step 6. In the **Order Management** tab, click on **Global Order Promising**.

Image



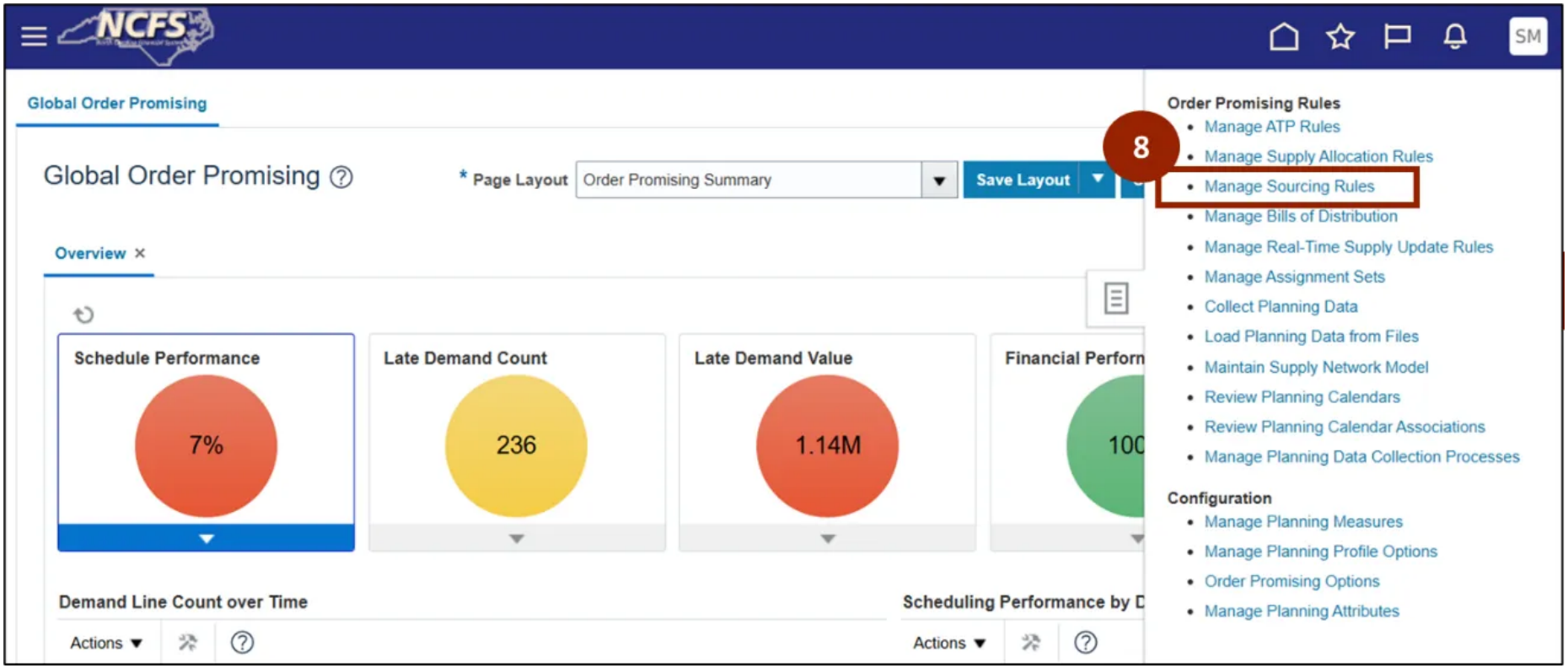
Step 7. Click the **Task** icon.

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Step 8. Click **Manage Sourcing Rules**.

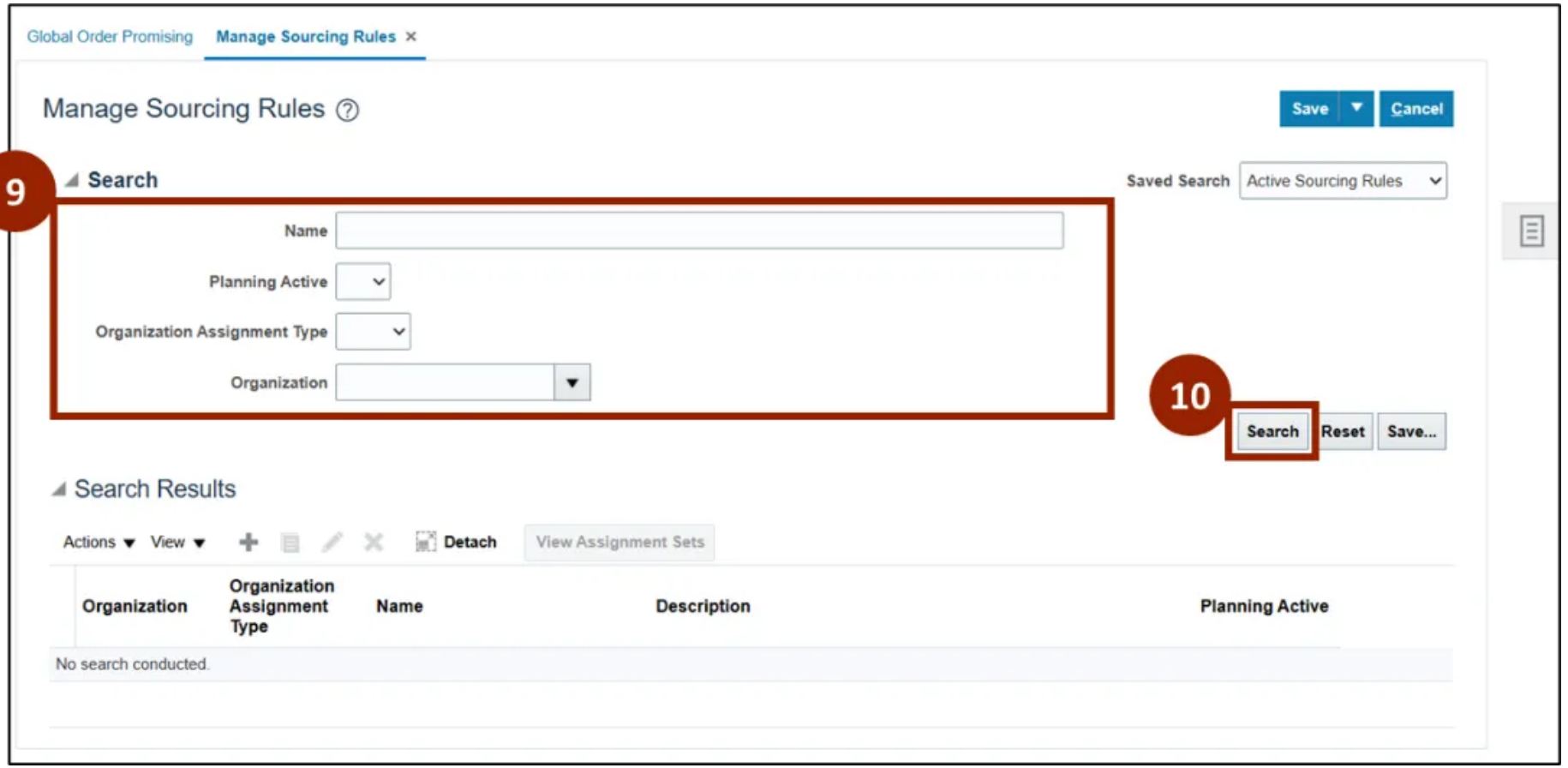
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Step 9. In the Search section, enter **sourcing rule details** into the appropriate text entry fields.

Step 10. Click the **Search** button.

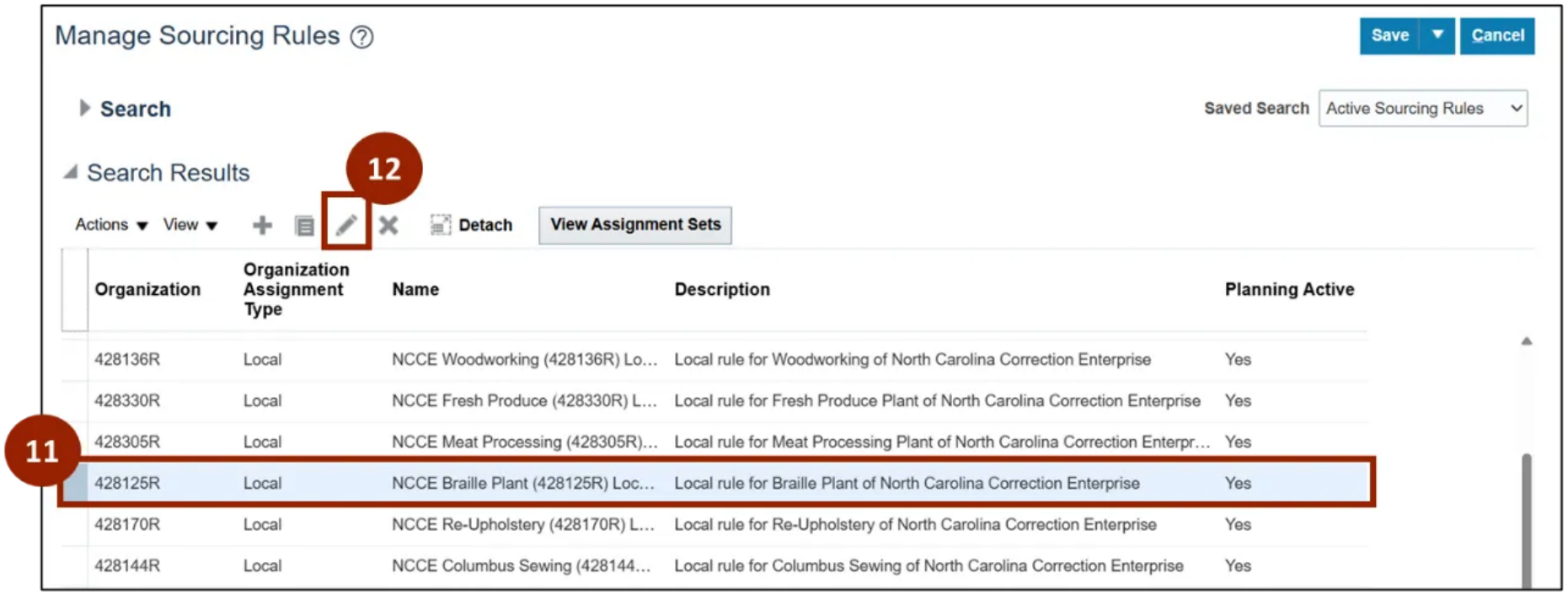
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Step 11. Click on the **Global Rule** to manage (i.e., 428125R).

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

Image



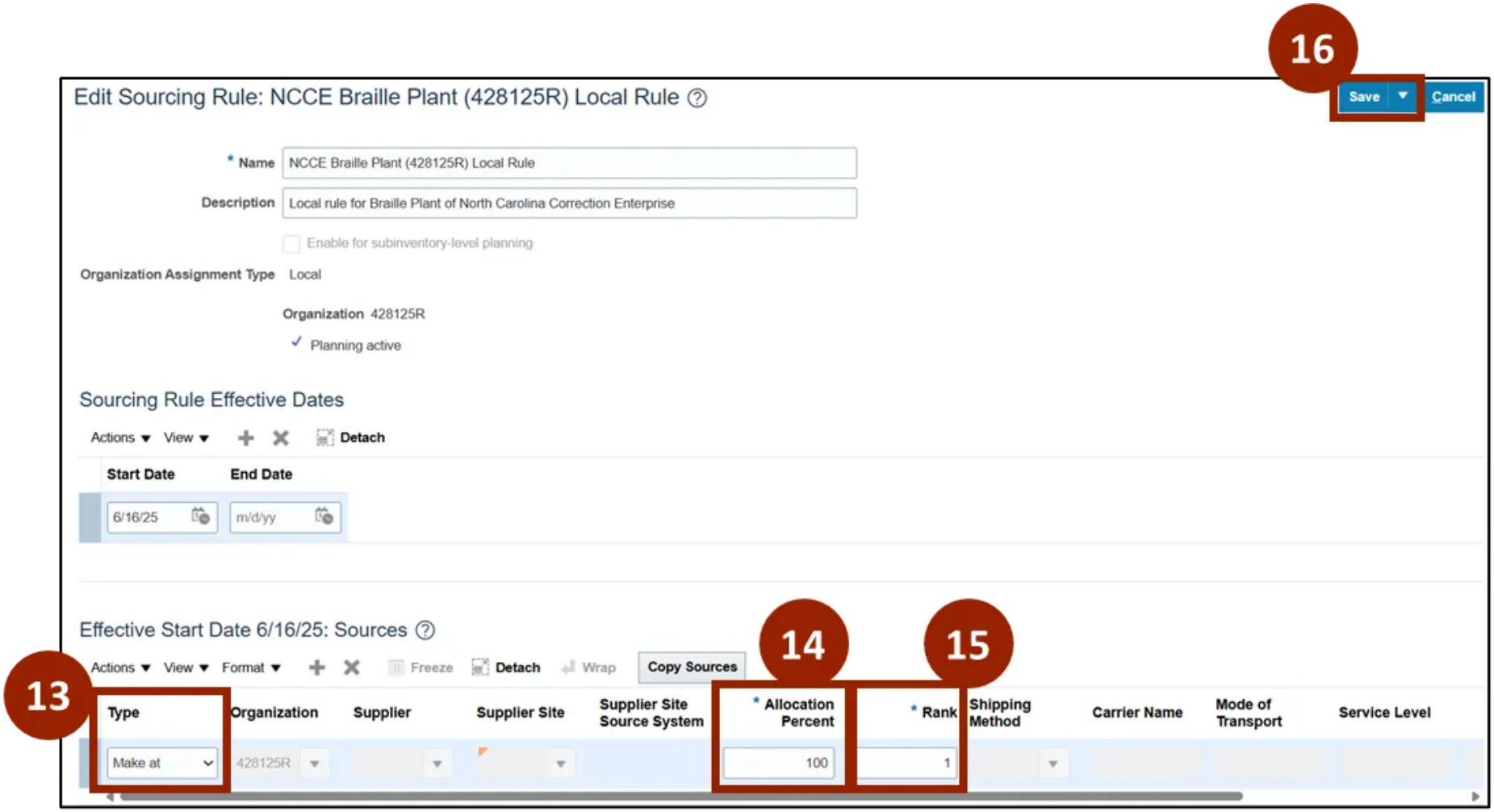
Step 13. Within the Type drop-down field, select the **new type**, if applicable (i.e., Make at).

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

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

Step 16. Click **Save**.

Image



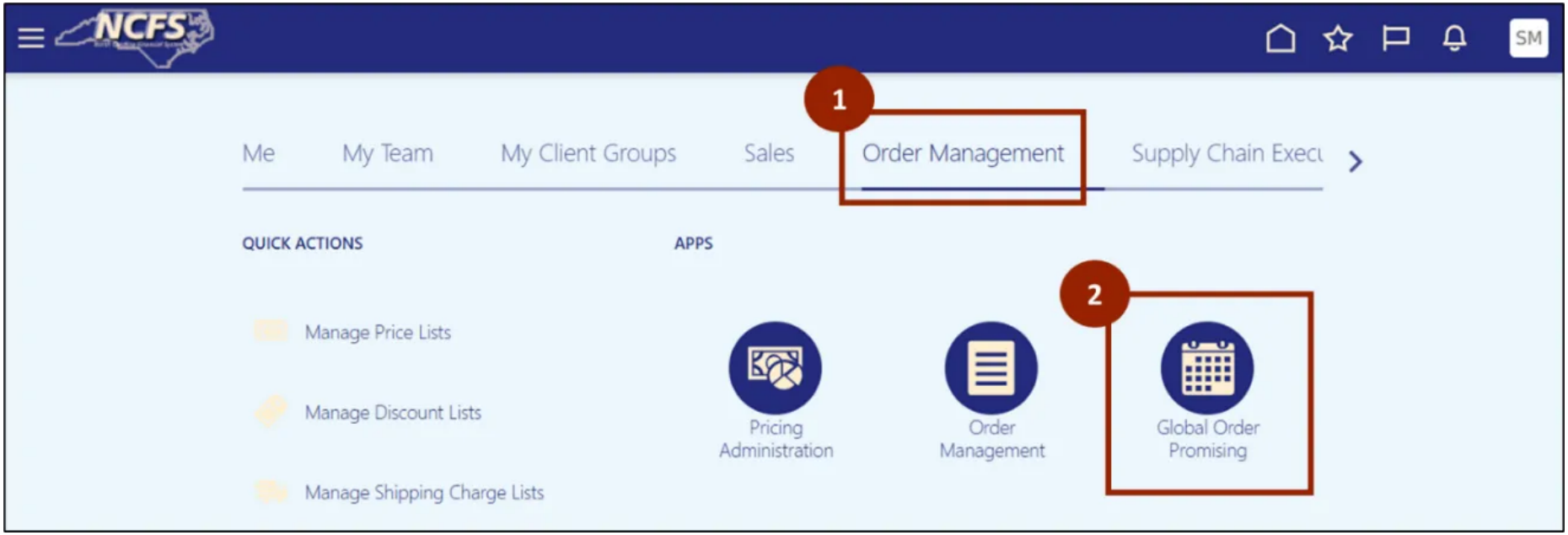
Set Up and Maintain ATP Rules

There are 10 steps to complete this process.

Step 1. On the Home page, select **Order Management**.

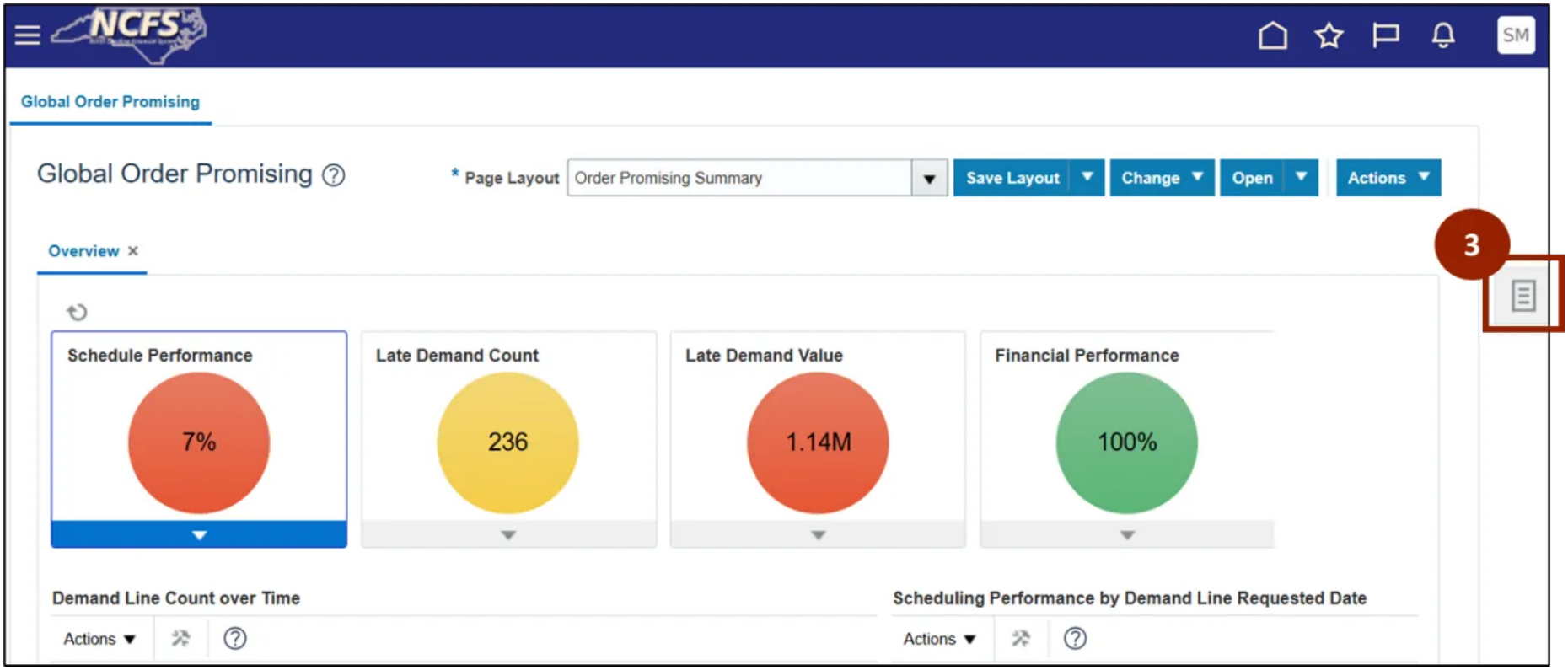
Step 2. Within the **Apps** tab, select **Global Order Promising**.

Image



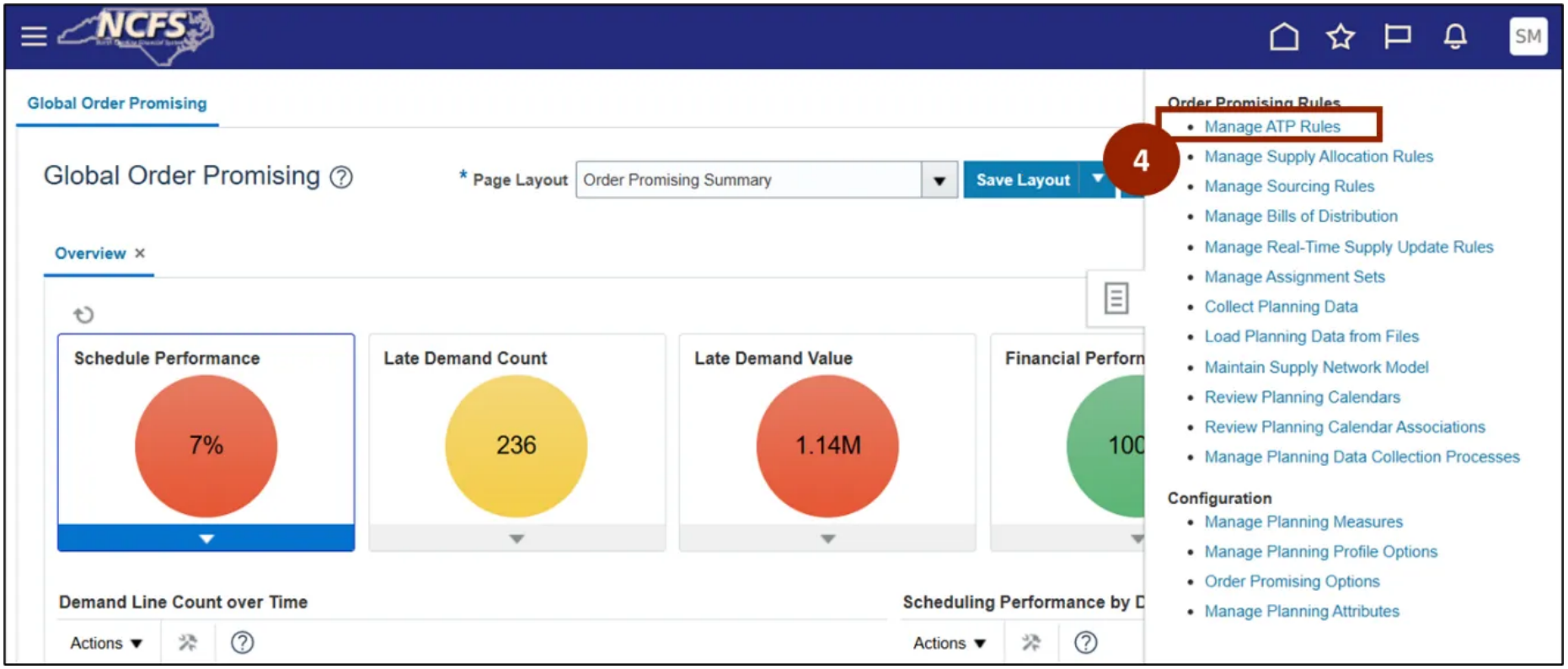
Step 3. Click the **Task** icon.

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

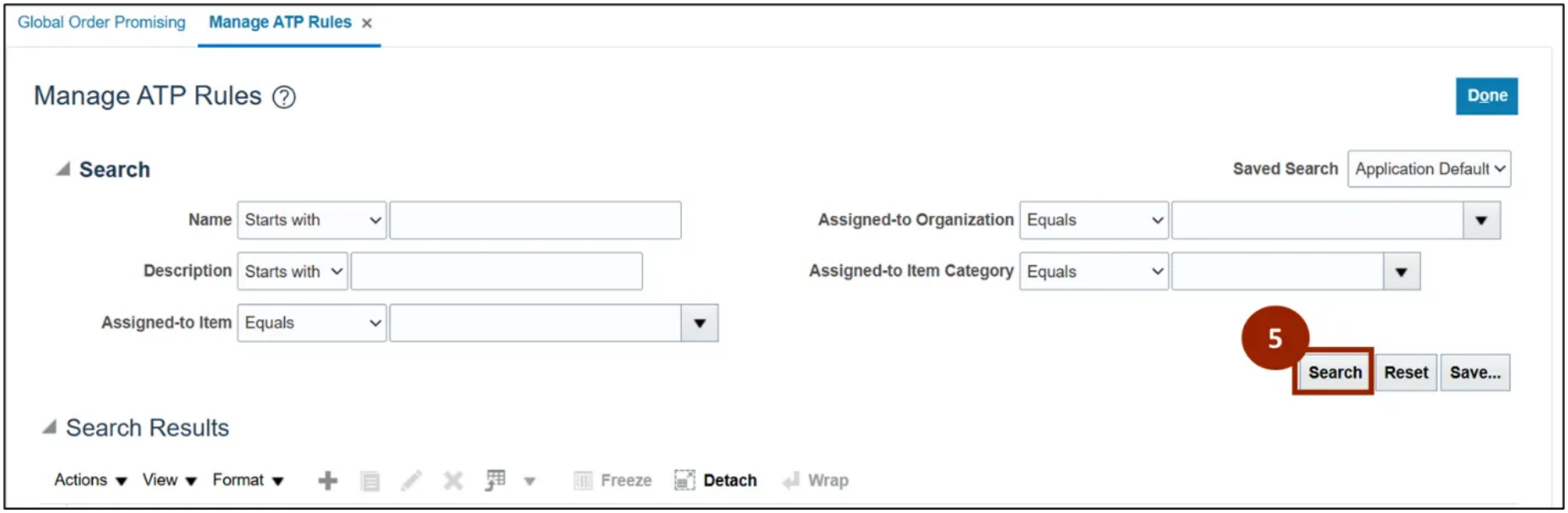
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Step 5. In the Manage ATP Rules screen, click the **Search** button.

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

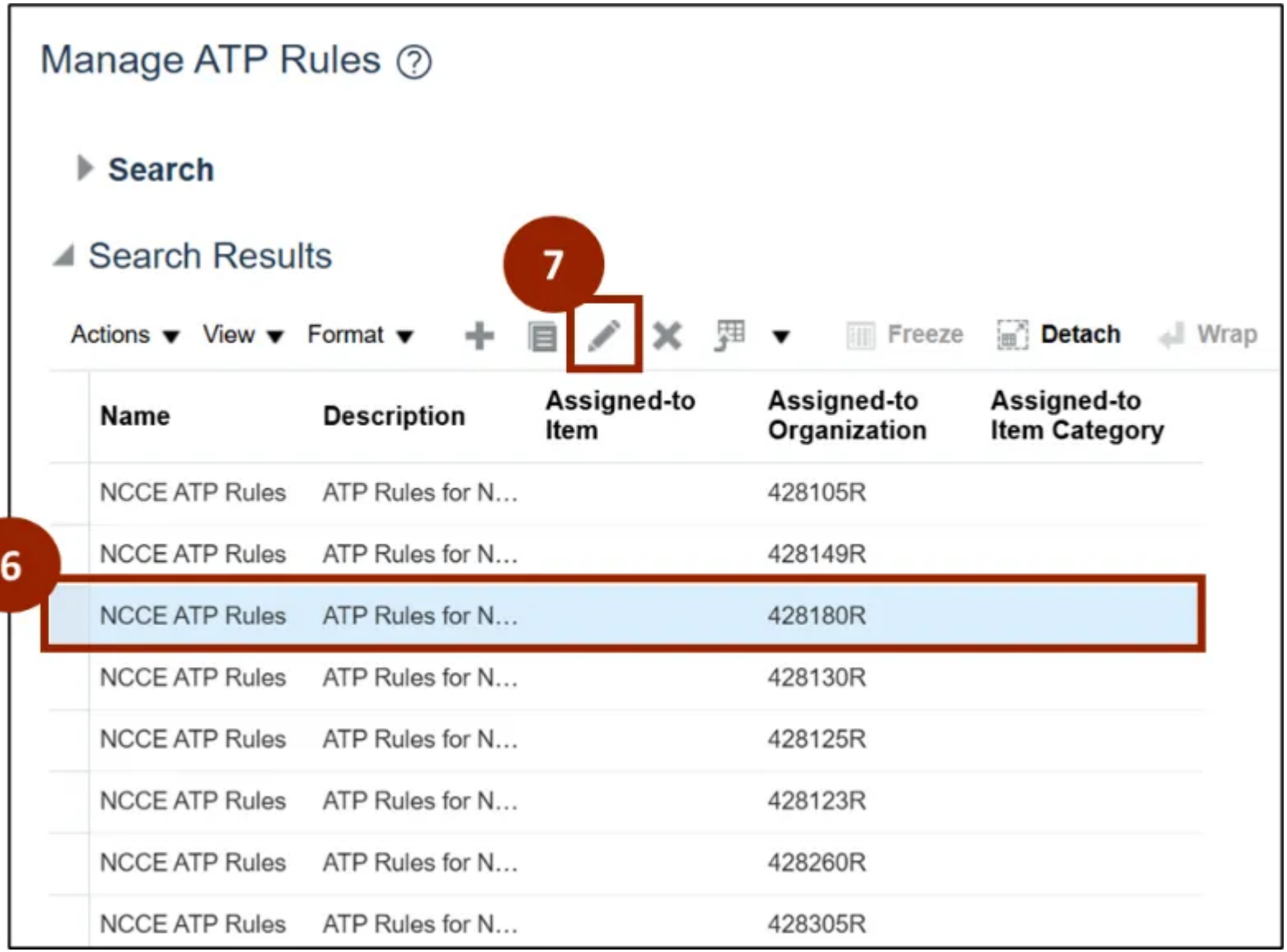
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Step 6. From the Search Results, select the desired **NCCE ATP Rule** row.

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

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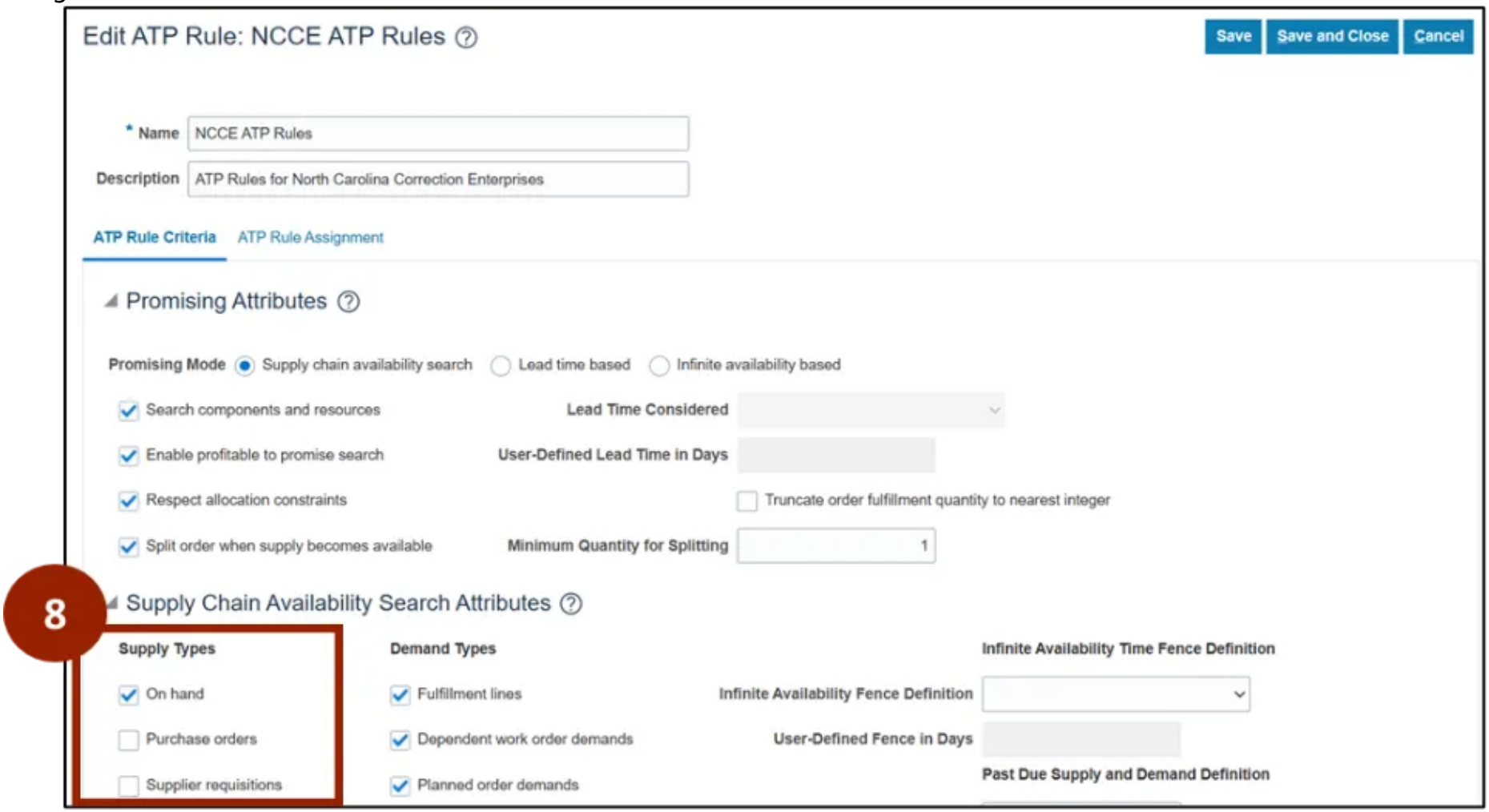


Step 8. In the Supply Types area, the system includes the following:

- 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.

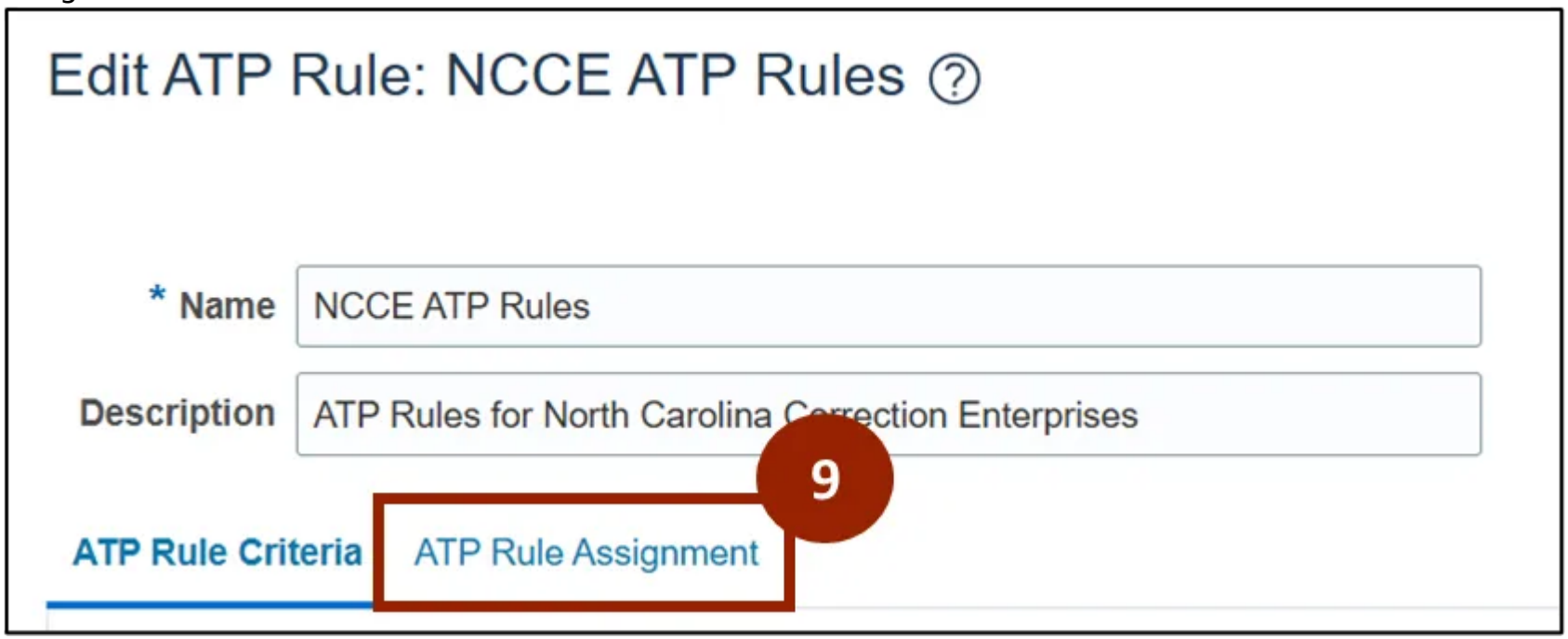
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Step 9. Select the **ATP Rule Assignment** Tab.

- 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.

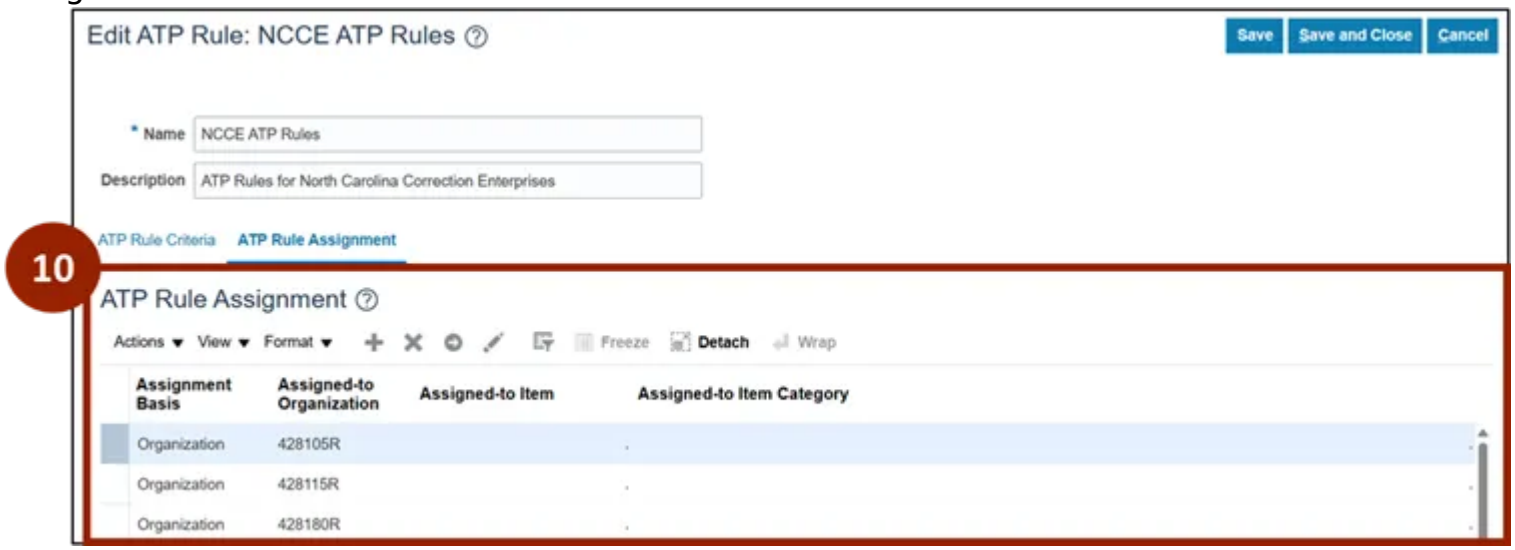
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Step 10. How ATP and sourcing rules work together:

- 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.

Image



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

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