MFG-10 Create and Update Product Master Data

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step guide of how to create and update product master data in the North Carolina Financial System (**NCFS**).

Introduction and Overview

This QRG covers the process of the creation and modification of Product Master Data primarily through the Product Information Management (PIM) module within the Product Hub. There are two types of products: Inventory Items and Manufactured Items. Inventory Items are used for internal consumption or for manufacturing a finished product, which is stocked, tracked, and valued in inventory. While Manufactured Items are manufactured in the Plant using Inventory Items. Manufactured Items are either internally consumed or sold to external customers.

Initiate Product Creation

There are 11 steps to complete this process.

Step 1. Log in to the NCFS portal using the **Company Single Sign-On (SSO)** button.

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

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

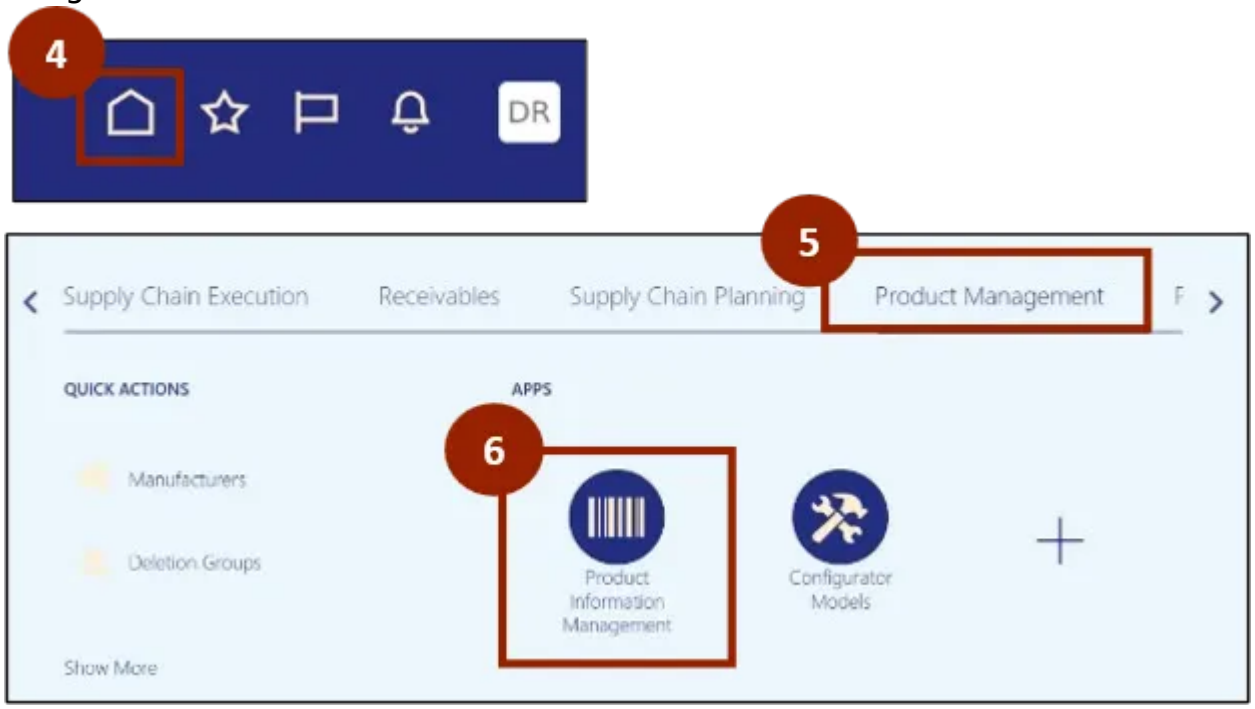
Note: The system will automatically sign on using SSO and log in to NCFS. After the first login using SSO, future access may not require credentials. If SSO is not available, enter credentials manually within the Username and Password fields, then click **Sign-In**.

Step 4. Begin from the Home page, or click the **Home** icon.

Step 5. On the Home page, select **Product Management**.

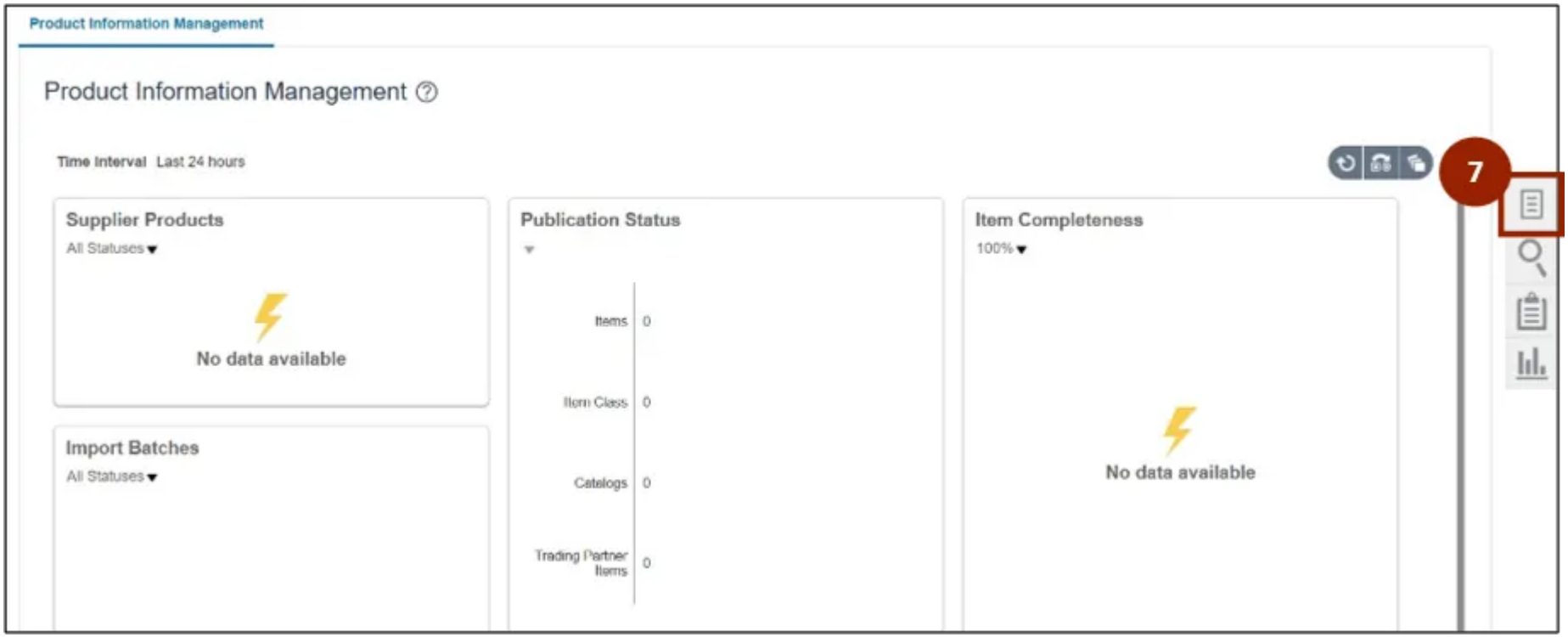
Step 6. Within the **Product Management** tab, select **Product Information Management**.

Image



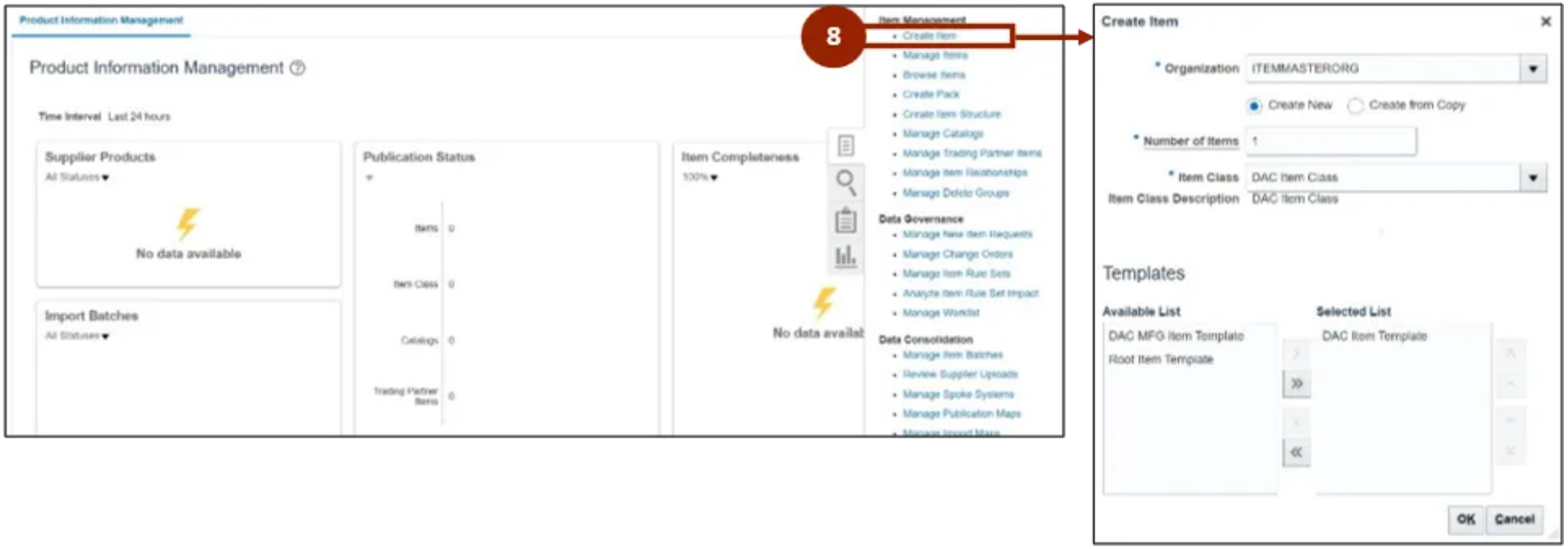
Step 7. Click the **Task** icon.

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Step 8. Under the Item Management heading, click **Create Item**.

Image



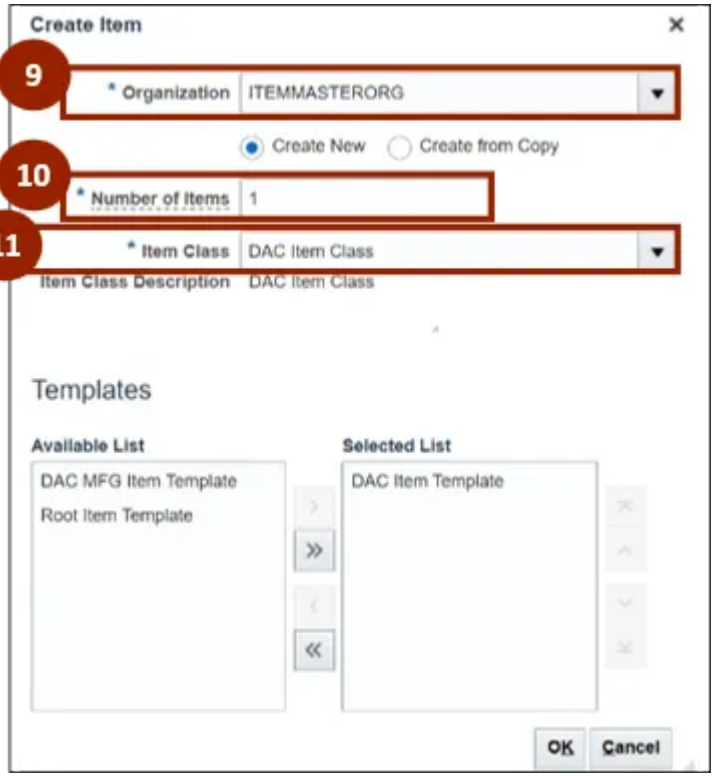
Step 9. In the Organization field, enter **ITEMMASTERORG**.

Step 10. In the Number of Items field, enter the **Quantity** required.

Step 11. In the Item Class field, enter **DAC Item Class**.

Note: Defining the item at the master level ensures that all units use the same item definition.

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Applying Item Templates

In DAC, there are two Item Templates: **DAC Item Template** and **DAC MFG Item Template**.

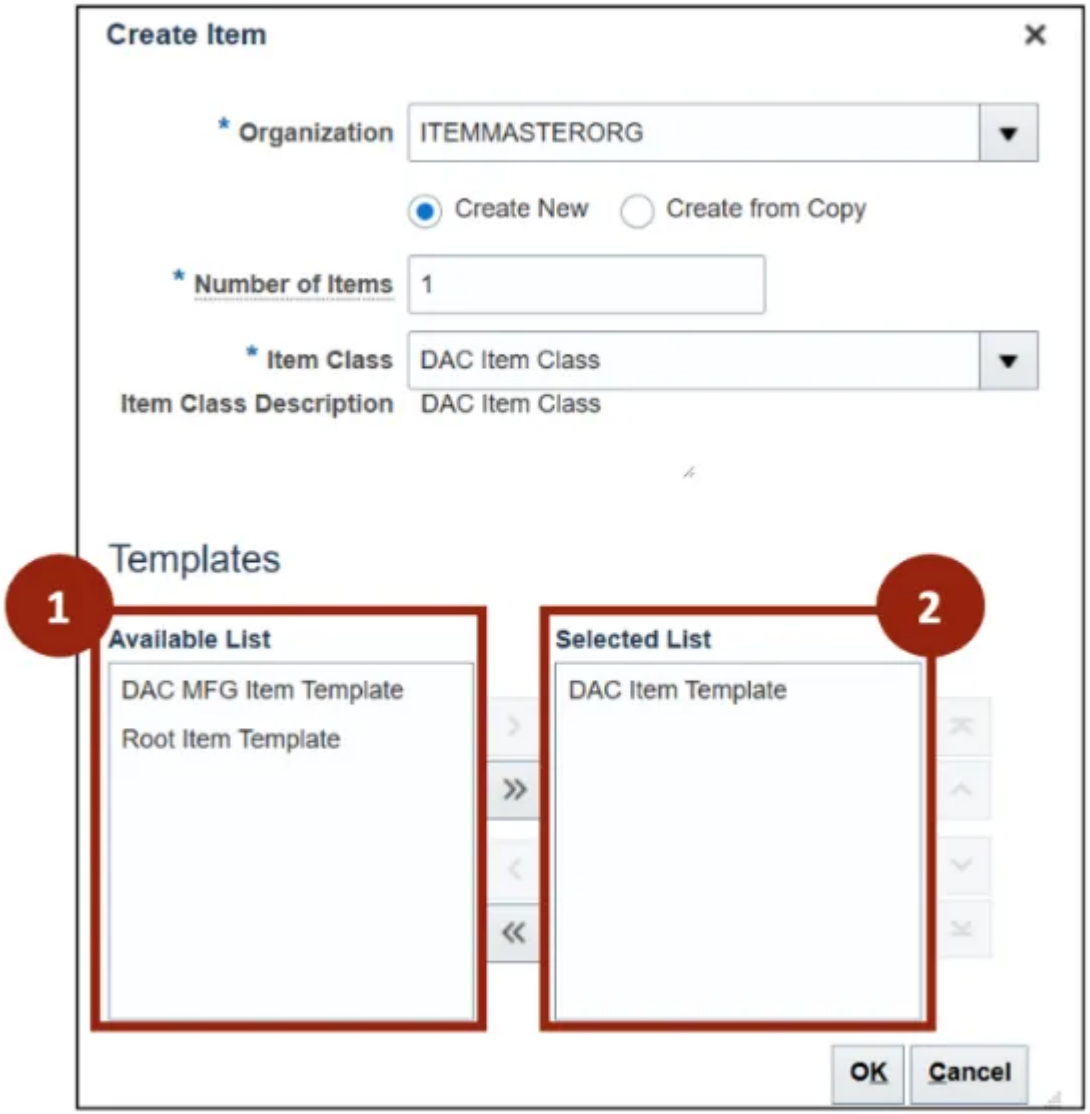
- **DAC Item Template** is typically the default Template selected. It is used when creating items at the ITEMMASTERORG level and creating any buy items from a DAC plant.
- **DAC MFG Item Template** is used when creating a manufacturing item from a DAC manufacturing plant, also known as finished goods.

To apply an item template, complete the following steps. There are 14 steps to complete this process.

Step 1. Within the Templates section, the Available List displays a list of templates available to apply.

Step 2. The Selected List displays the Template selected for this item, defaulted to display DAC Item Template.

Image

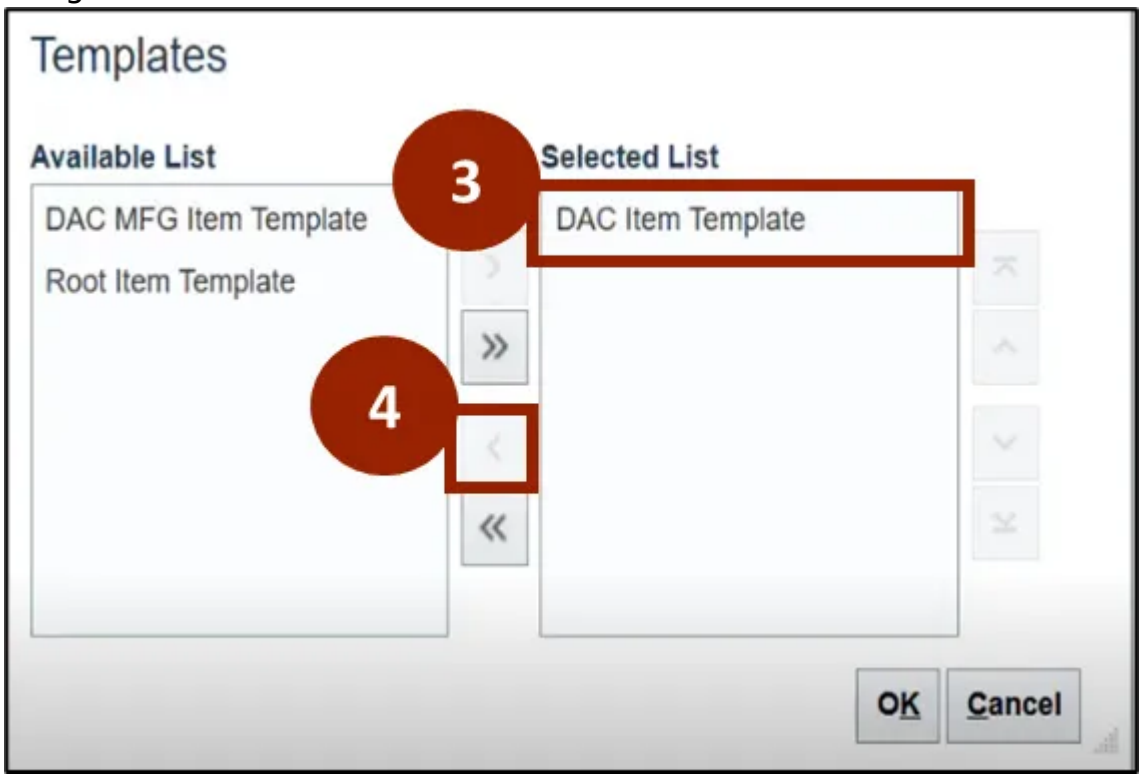


To switch the defaulted Template to the DAC MFG Item Template within the Selected List follow these steps:

Step 3. Within the Selected List, select the **Item Template** you would like to move (i.e., DAC Item Template).

Step 4. Click the **left facing single arrow** to move the selected Template to the Available List.

Image

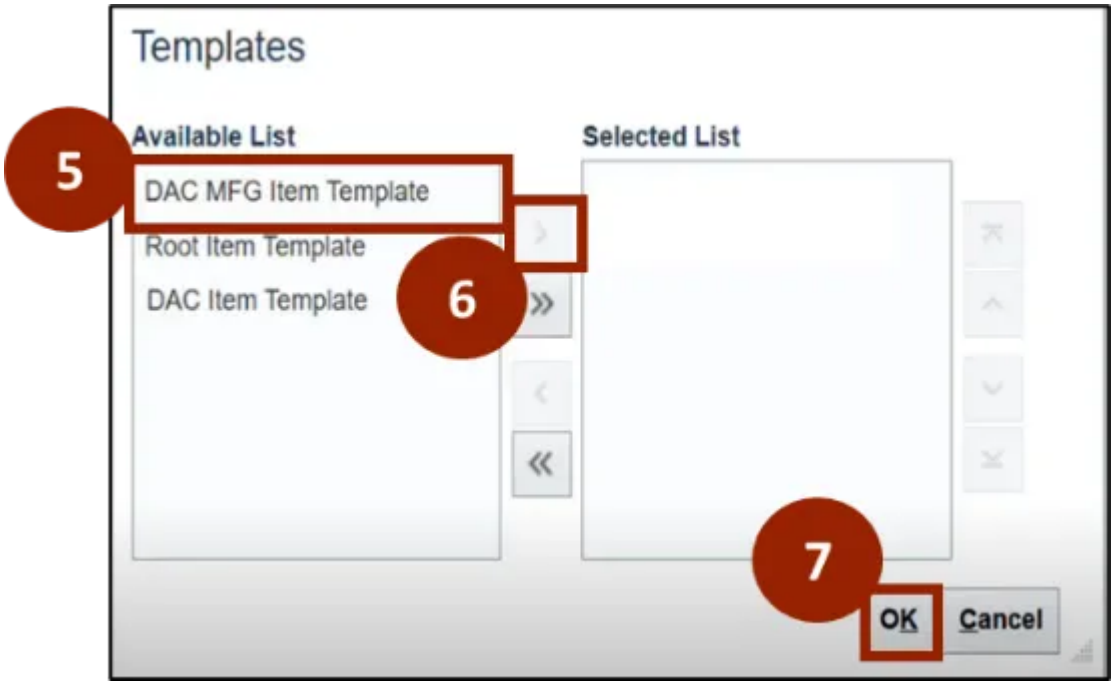


Step 5. Within the Available List, select the **Item Template** you would like to move (i.e., DAC MFG Item Template).

Step 6. Click the **right facing single arrow** to move the selected Template to the Selected List.

Step 7. Click the **OK** button.

Image



Step 8. On the Create Item screen, enter the **item description** within the Description field (e.g., standard business card, 3.5 x 2 in, matte finish).

Note: Users can input a maximum of 240 characters including spaces.

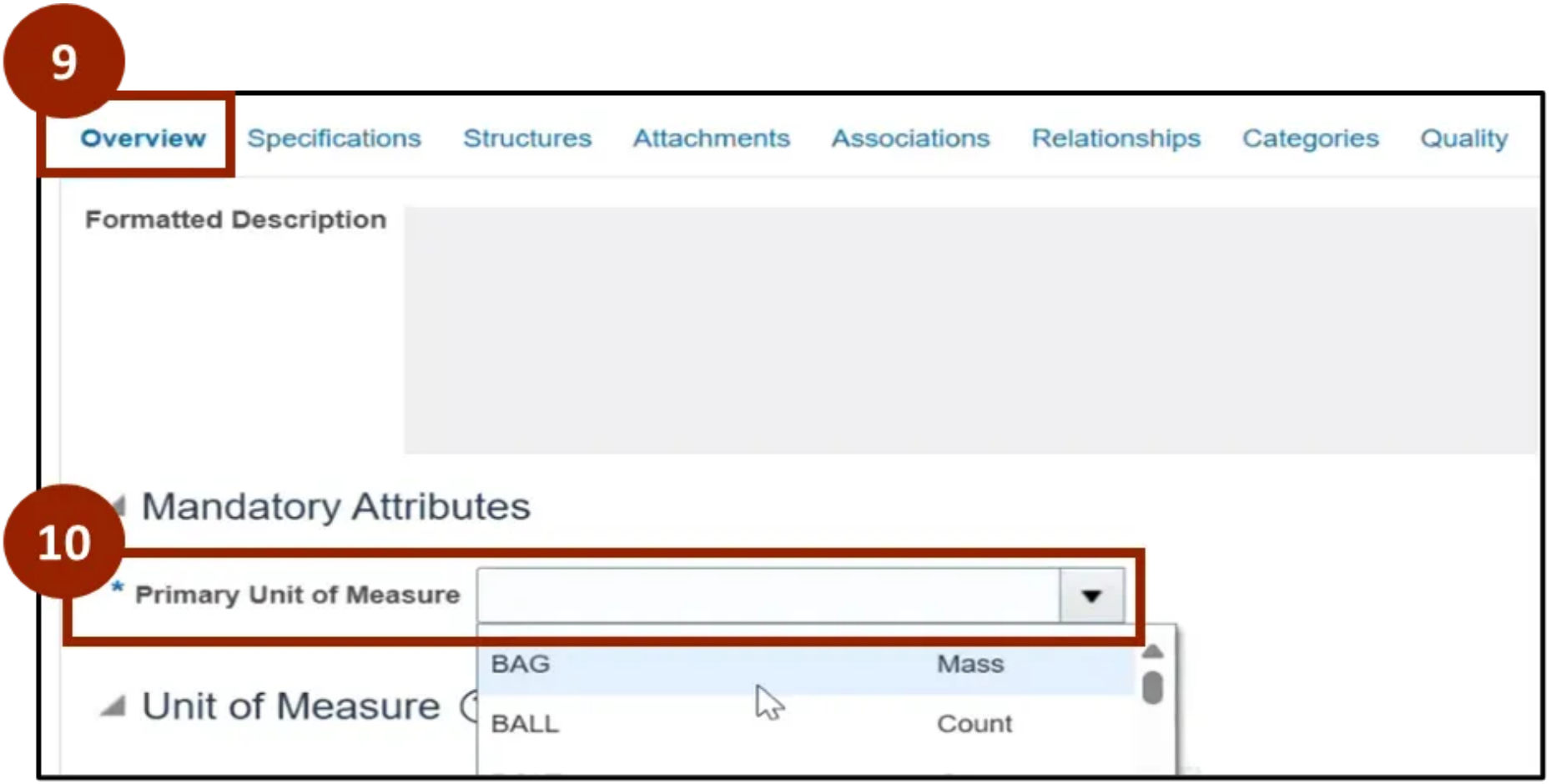
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Step 9. Click on the **Overview** tab.

Step 10. Select the appropriate **Unit of Measure (UOM)** within the Primary Unit of Measure field based on item type (e.g., for a business card, the UOM would be “Each”).

Image



Step 11. Click on the **Specifications** tab.

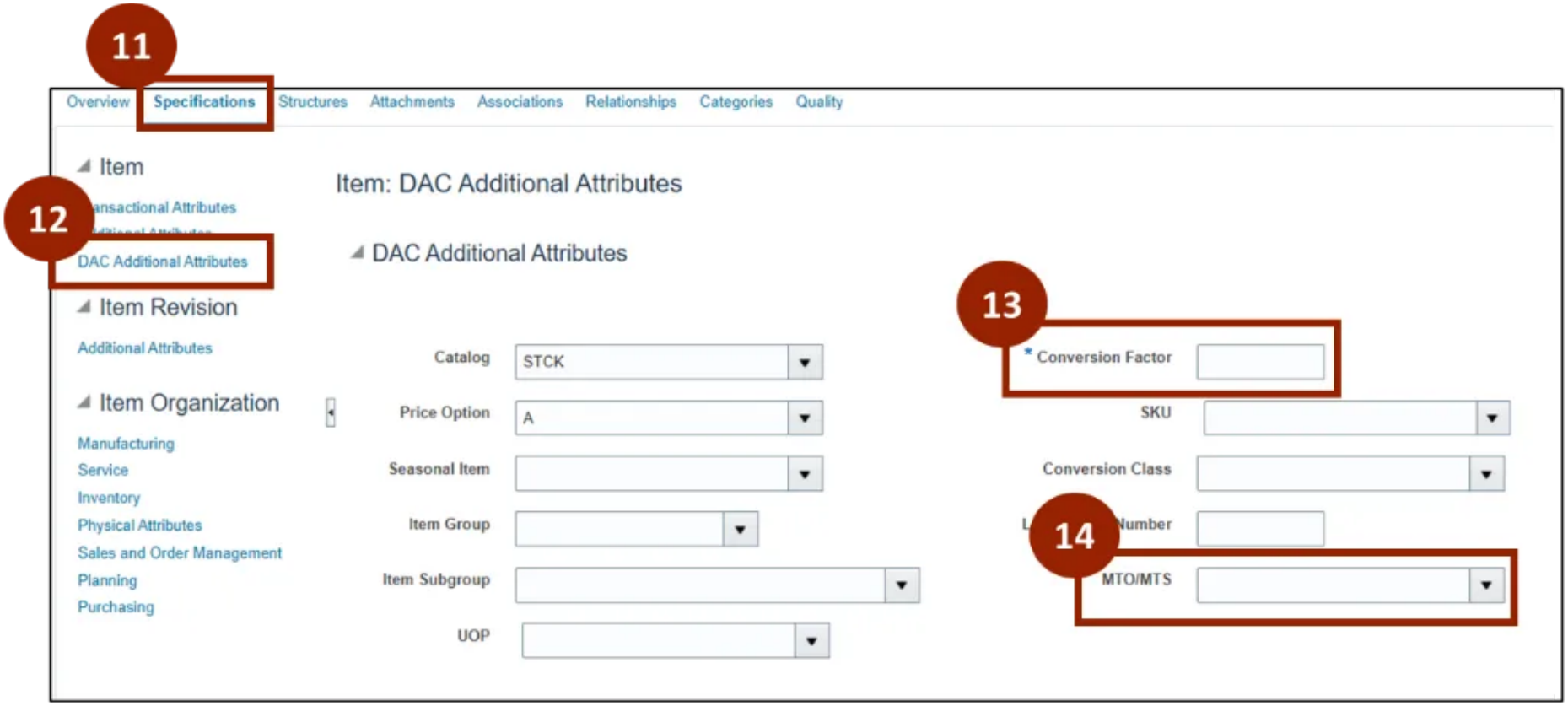
Note: Most specifications are auto-filled based on the selected template. Tabs such as **Manufacturing, Services, Sales and Order Management, Inventory,** and **Planning** will populate with relevant data.

Step 12. Click **DAC Additional Attributes** in the Item section.

Step 13. Enter the **Conversion Factor**.

Step 14. Select **MTO/MTS** from the drop-down.

Image



Manage Product Master Data Process

The next section of the process flow includes additional activities that complete the Product Master Data management process. These include Add Associations, Define Categories, Save Progress, View and Verify Item Details, Define MFG Template Structure and Finalize and Complete.

Add Associations: Inventory Organization Association Process

When an item is created in the system it is initially established under the ITEM MASTER ORG level. To enable the item for inventory-related transactions or operations it must be associated with an Inventory Organization.

There are 7 steps to complete this process.

Step 1. Navigate to the **Associations** tab.

Step 2. Click the **Select and Add** icon.

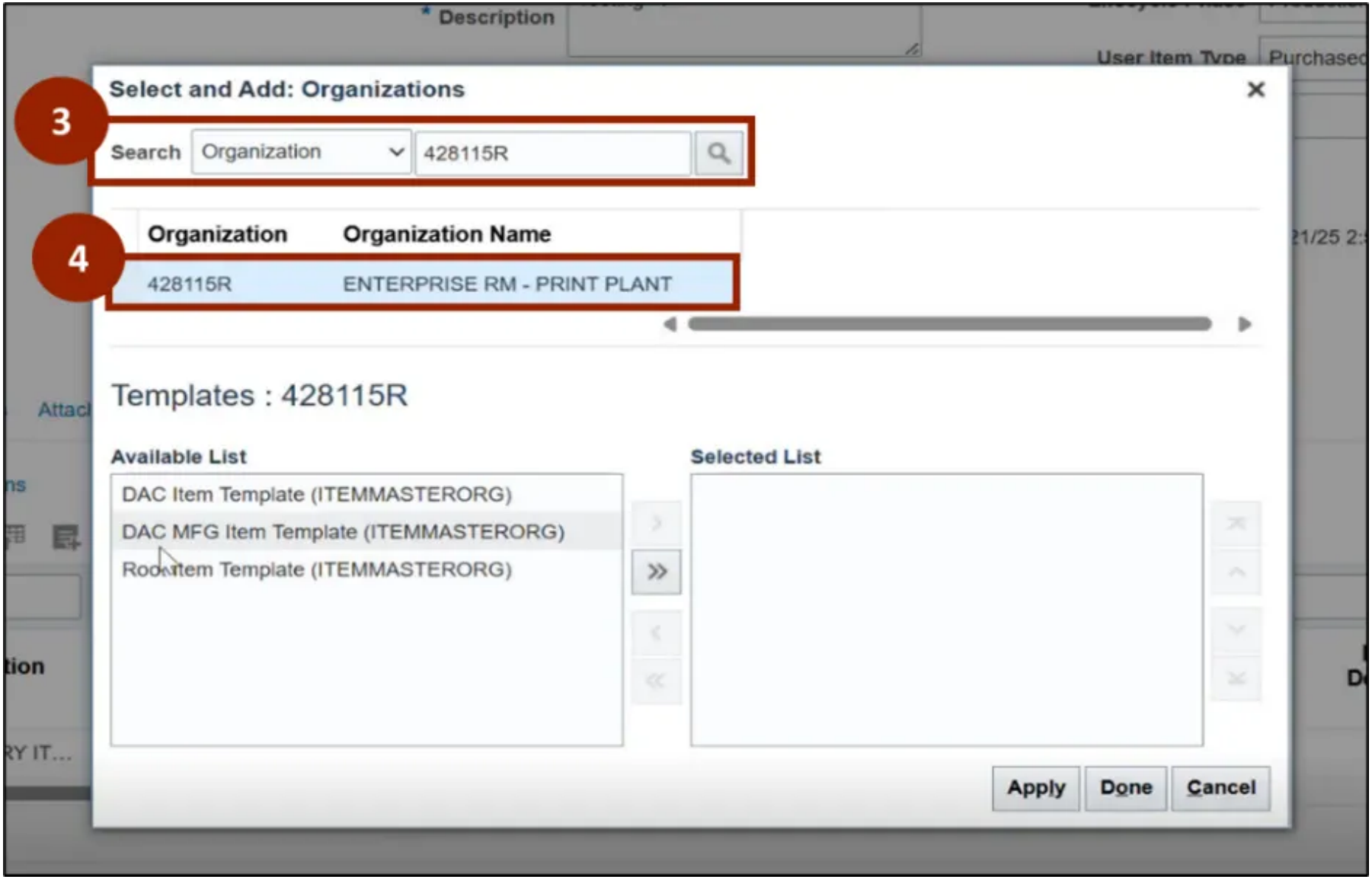
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Step 3. In the Organization search field, enter a **Plant** and search.

Step 4. Select the appropriate **Plant** from the results.

Image



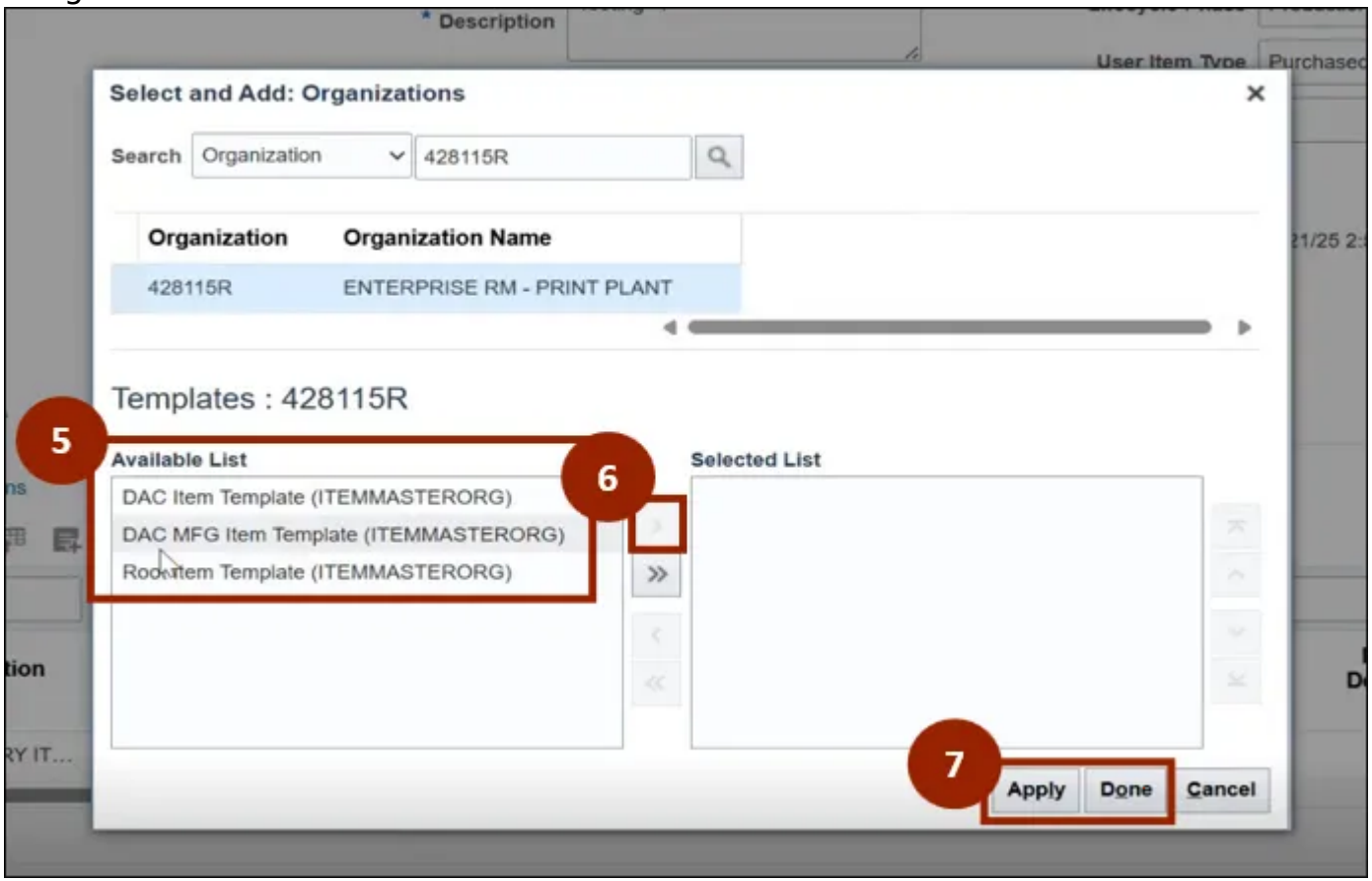
Step 5. Under the Available List, select the appropriate **Template**.

Step 6. Click the **right facing single arrow** button to add the desired template to the Selected List.

Step 7. Click **Apply**, then click **Done** to close the Select and Add: Organizations window.

Note: When associating an Item with the Organization where it will be manufactured, select the “DAC MFG Item Template” during the association process.

Image



Designate Catalogs and Categories

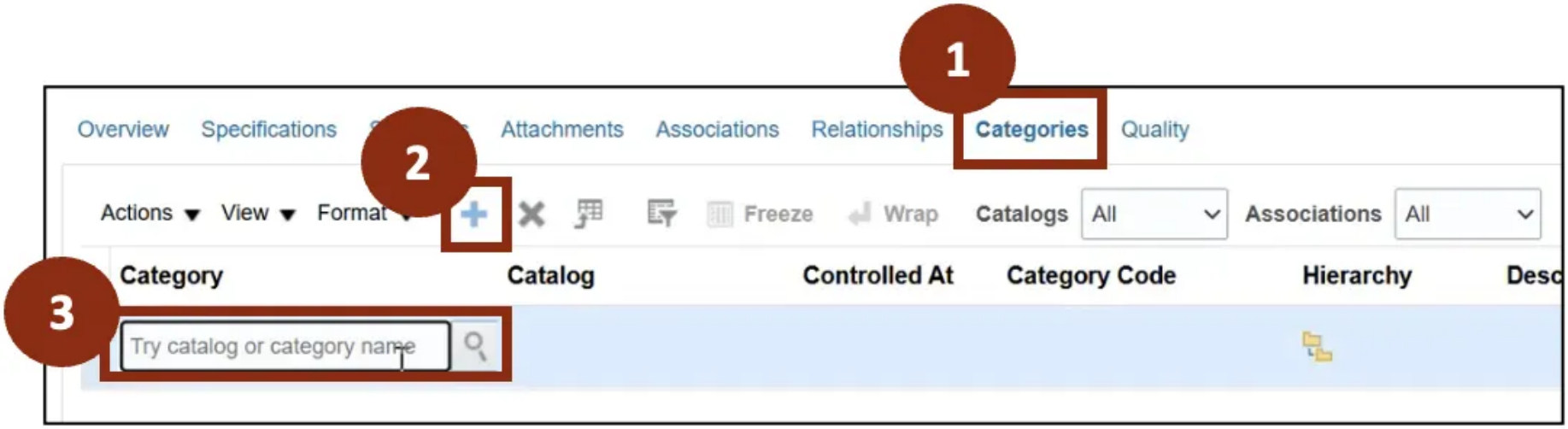
There are 7 steps to complete this process.

Step 1. To add category or catalog name, navigate to the **Categories** tab.

Step 2. Click the **Plus (+)** icon.

Step 3. Within the Category column, click the Search field icon to open the Search and Select: Category pop-up screen.

Image



Step 4. Within the Catalog field, select **NC Catalog**.

Step 5. Select the appropriate **Category** from the results to accurately reflect the item’s nature and classification.

Step 6. Scroll to the bottom of the Search and Select: Category pop-up screen and select **OK**.

Image



Save Progress.

Step 7. Click **Save**.

Note: The item currently displays as ITEMMASTERORG, highlighted below. Once saved the system will generate and display the Item Number.

Image



View Item in Plant and Verify Details

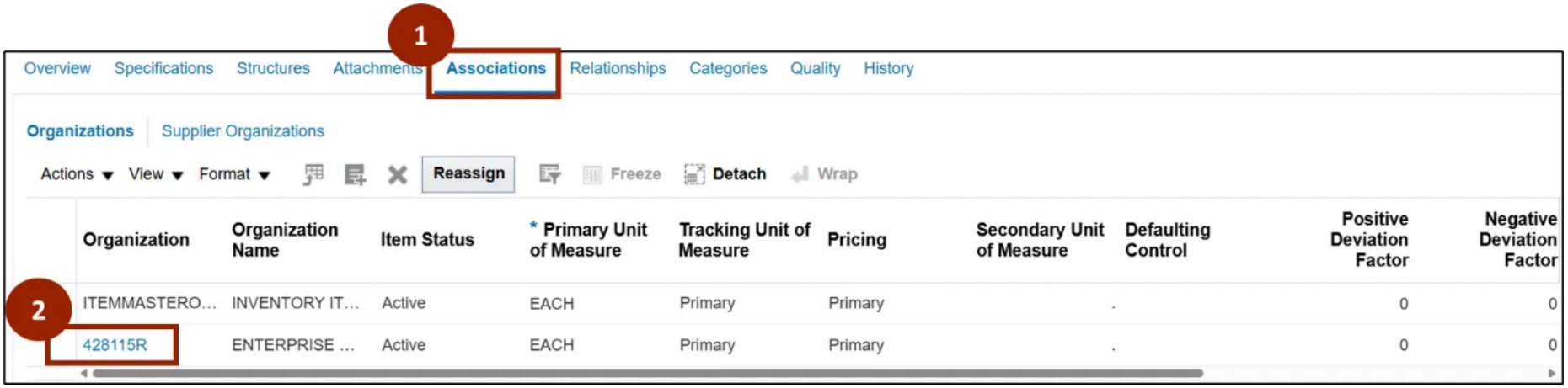
There are 16 steps to complete this process.

Step 1. Navigate to the **Associations** tab.

Step 2. Within the Organization column, Click the **associated hyperlink** to open the plant-specific details page.

Note: Check the item details under the **Specifications** tab as required.

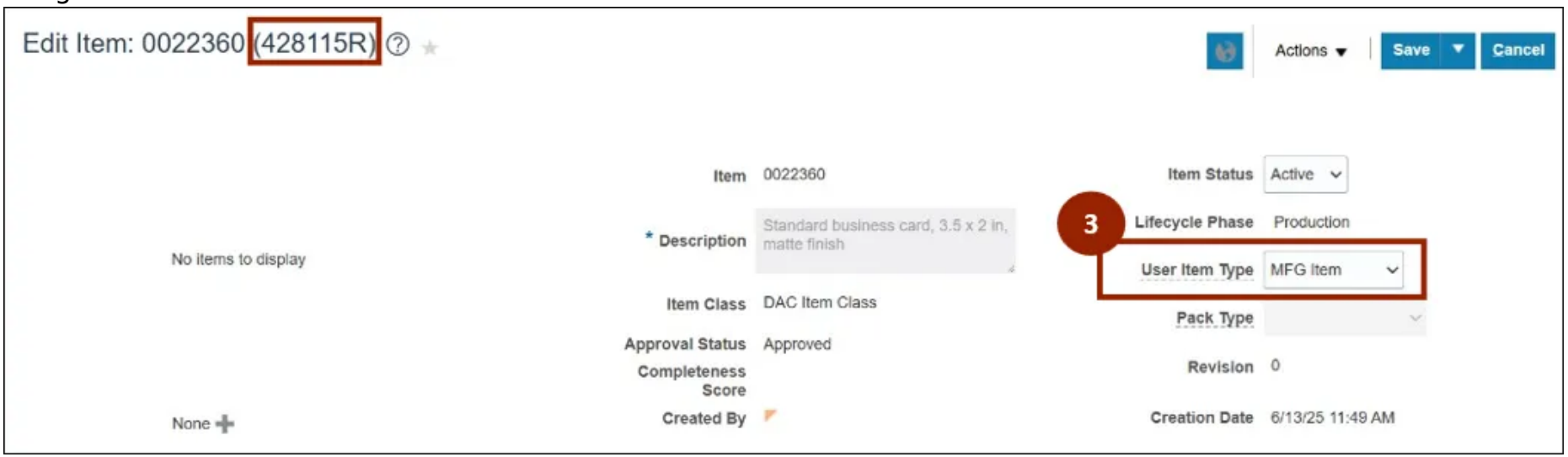
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Step 3. Within the Plant details, verify that the User Item Type field is set to **MFG item**, as this aligns with the selection of the DAC MFG ITEM TEMPLATE for manufacturing items.

Note: The plant identification is displayed in parenthesis next to the Item Number (e.g., 428115R).

Image

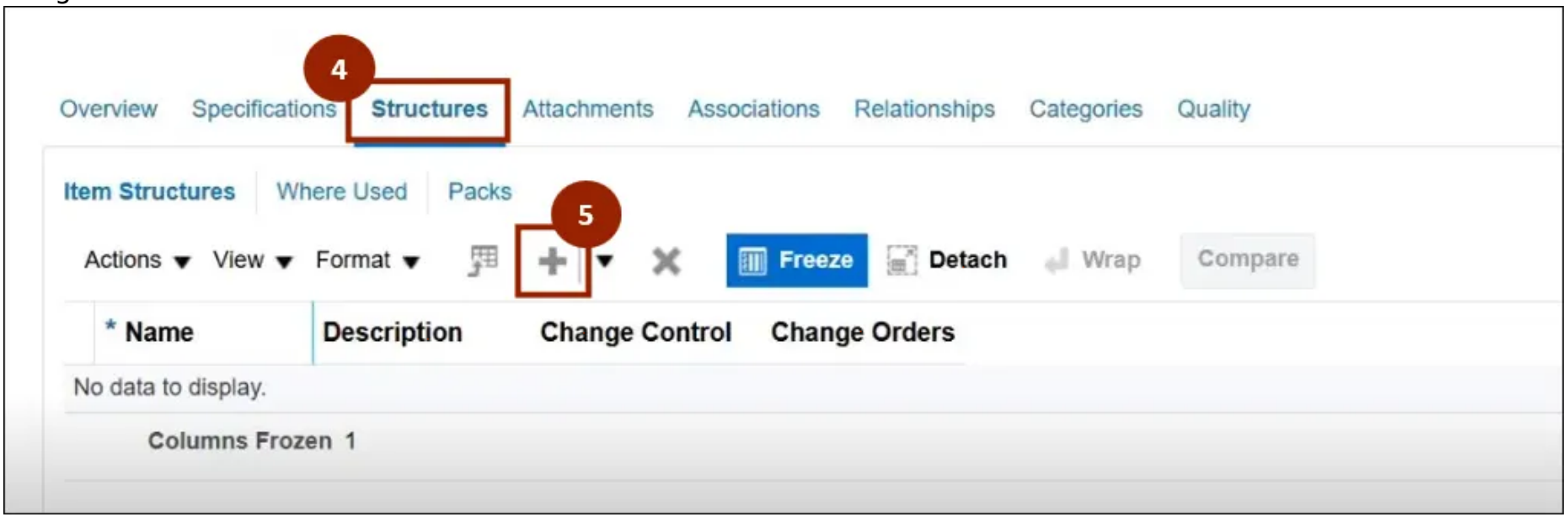


Define the MFG Template Structure

Step 4. Navigate to the **Structures** tab.

Step 5. Click the **Plus (+)** icon to add a new structure.

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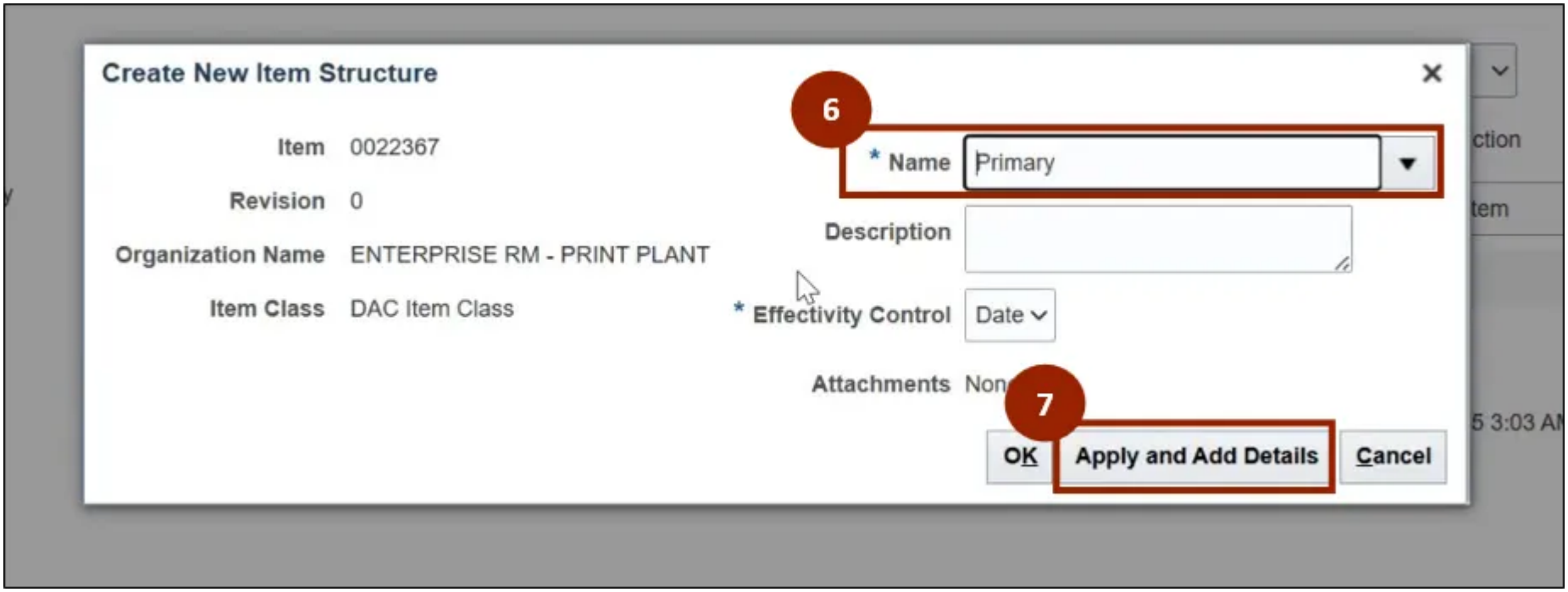


Step 6. Within the Name drop-down field, select **Primary**.

Note: Primary should be selected when creating the Item Structure.

Step 7. Click on **Apply and Add Details**.

Image

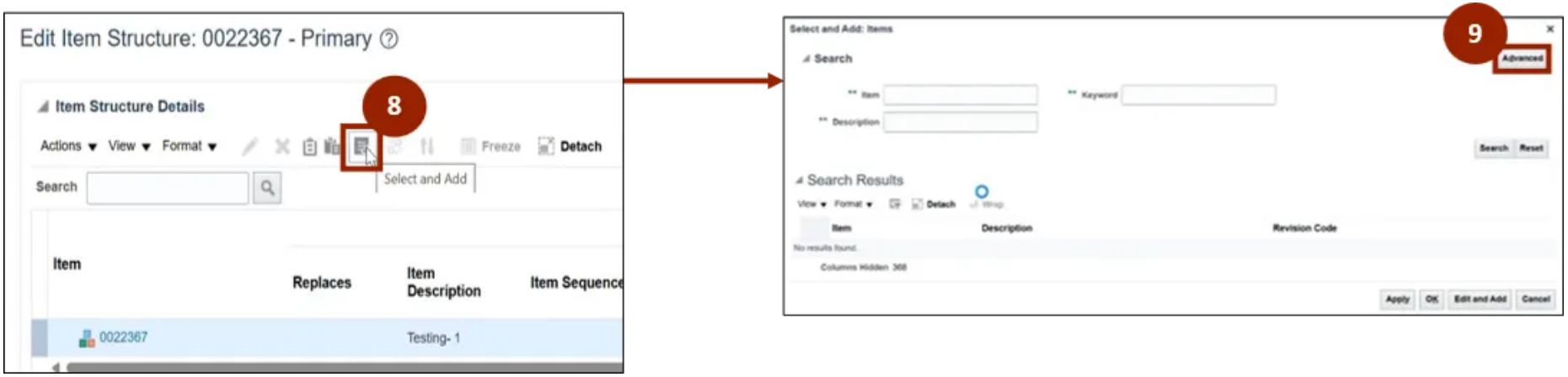


Step 8. Click the **Select and Add** icon to open the Select and Add: Items pop-up screen.

Step 9. Click **Advanced** to display Advanced Search fields.

Note: If you do not see the Select and Add icon, click the **double arrows** to expand table option. The Select and Add: Items screen enables you to define all required raw materials for the Item.

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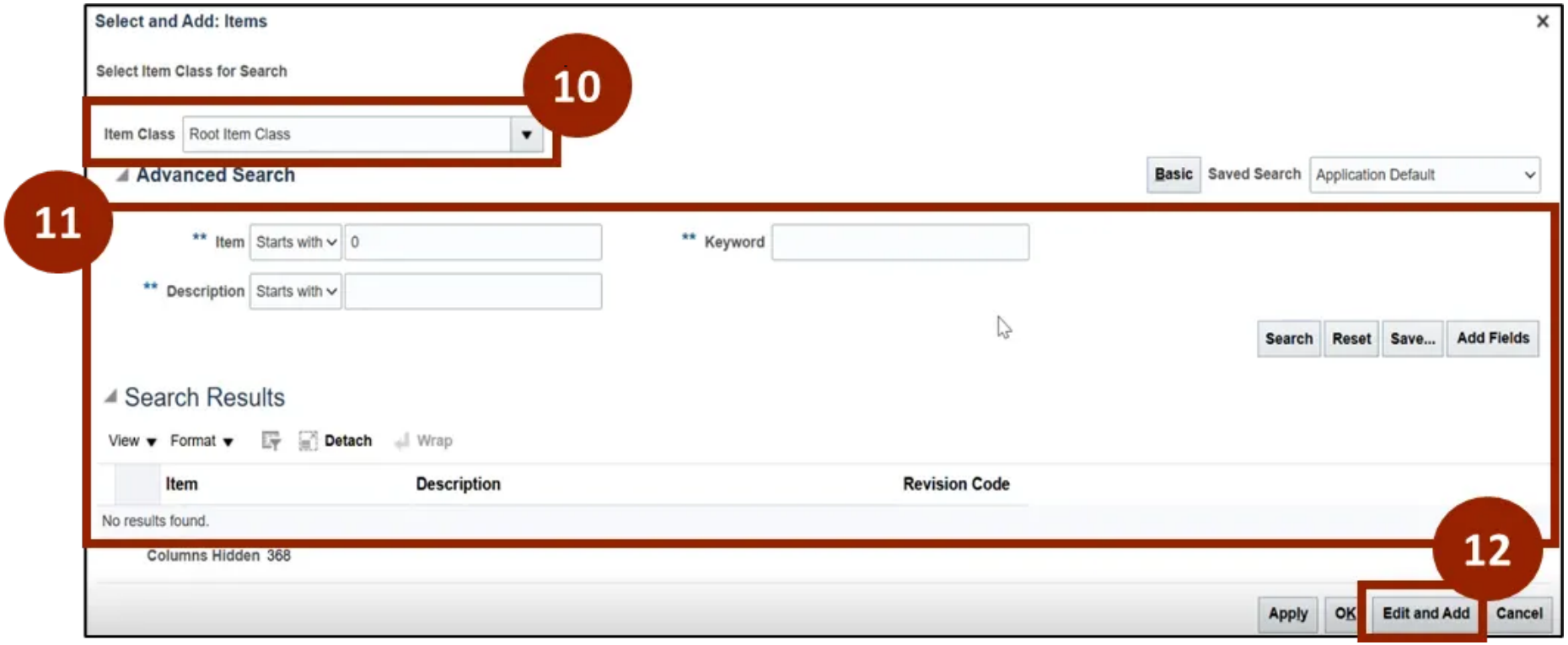


Step 10. In the Item Class field, select **Root Item Class**.

Step 11. Use the Advanced Search fields to search and select a specific **Item** from the **Search Results** (e.g., Item 0002400).

Step 12. Once the Item (raw material) is selected, click **Edit and Add**.

Image



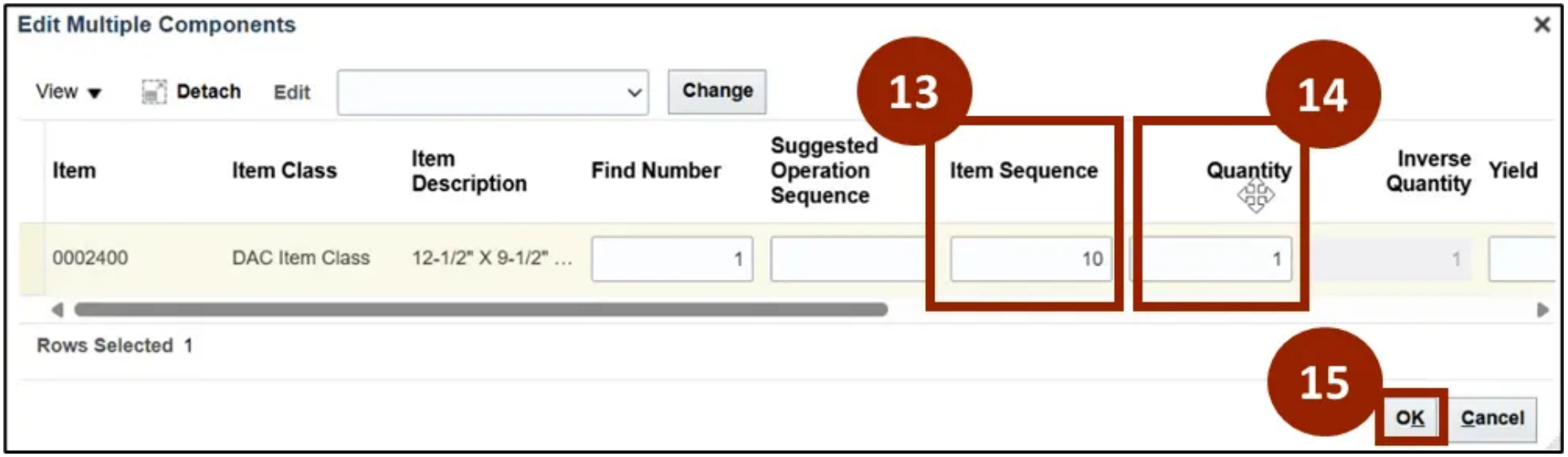
Step 13. Within the Item Sequence entry field, add the **Item Sequence** (the order in which the material is used in the manufacturing process) as a two-digit number (i.e. 10, 20, 30, and so on).

Step 14. Within the Quantity entry field, add the **Quantity** of each raw material required to produce the Manufacturing Item.

Step 15. Click **OK**.

Note: Repeat the above steps before proceeding to add as many Raw Materials as needed for the Manufacturing Item.

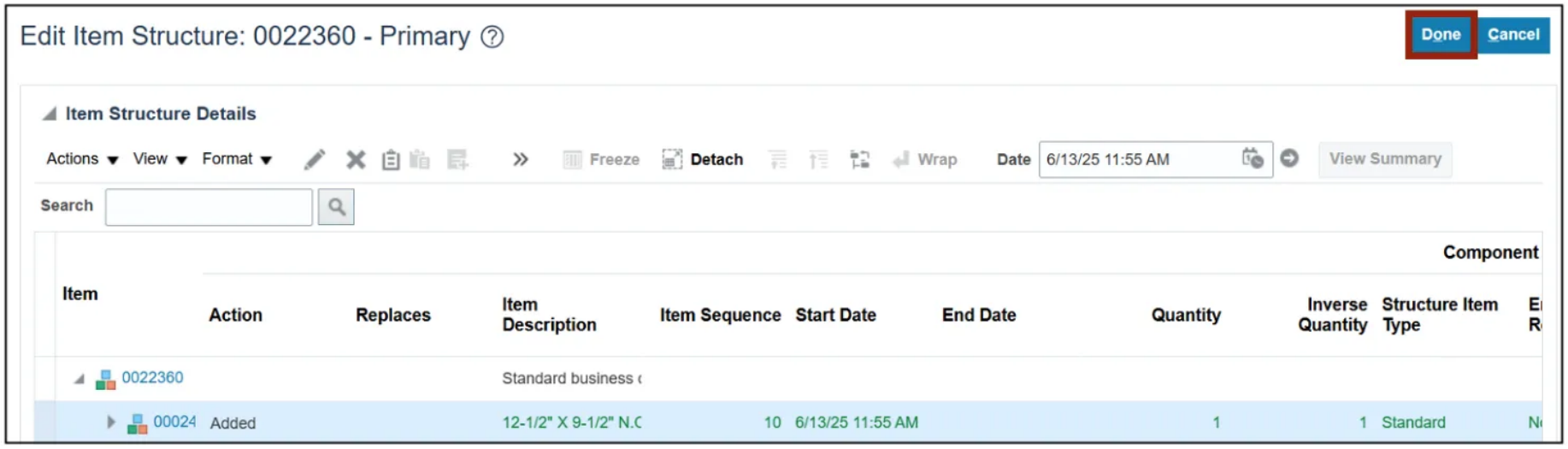
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Finalize and Complete

Step 16. Once all raw materials have been added, click **Done**.

Image



Define Product Relationship (Optional)

At this optional but valuable stage, product relationships can be established to enhance operational and customer-facing procedures. These may include:

- **Substitute Items**: Suggested alternatives if the primary item is unavailable.
- **Related Items**: Accessories or add-ons that complement the primary item.
- **Cross-sell/Upsell Items**: Products used in marketing or sales to increase transaction value.

Creating Product Master Data - Essential Fields

When we are creating a product like a business card, the following fields need to be entered.

Field	What to Enter
Item Number	A unique identifier for the item.

Field	What to Enter
Item Description	A concise description of the item (e.g. type, finish, customization).
User Item Type	Classification for product (e.g. Manufacturing Items, purchased item).
Unit of Measure	The measurement used (e.g., Each, Pack, box).
Item Category	Logical grouping of item.
Lifecycle Phase	Current stage of item (e.g., Design, Active, Obsolete).
Purchasable	Indicate if item can be procured.
Sellable	Indicate if item can be sold.
Stockable	Whether it should be held in inventory.
Inventory Tracked	If inventory quantities can be tracked.
Shippable	Whether it can be shipped.
Returnable	Whether it can be returned.
Organizations Assigned	Select business units where the item is available.
Attachments (optional)	Upload technical specs, design templates, or images.

Change Product Master Data

There are 13 steps to complete this process.

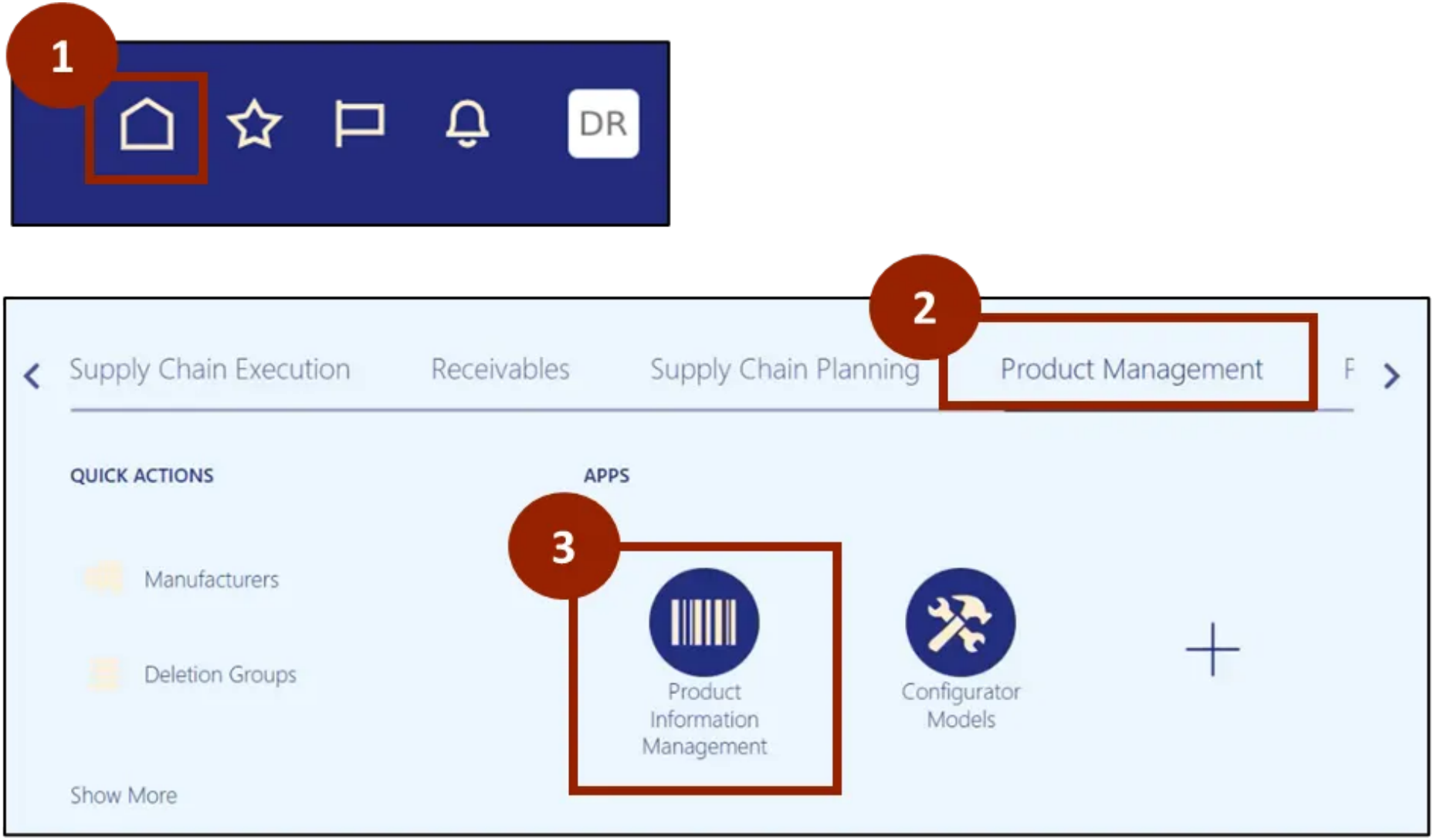
To change or update Product Master Data — such as changes to packaging, design, or other attributes —follow these steps.

Step 1. Begin from the Home page, or click the **Home** icon.

Step 2. On the Home page, select **Product Management**.

Step 3. Within the **Product Management** tab, select **Product Information Management**.

Image



Step 4. Click the **Task** icon.

Image



Step 5. Under the Item Management heading, click **Manage Items**.

Image



Step 6. Within the Advanced Search section of the Manage Items screen, enter the **Item Number** within the Item field

Step 7. Click the **Search** button.

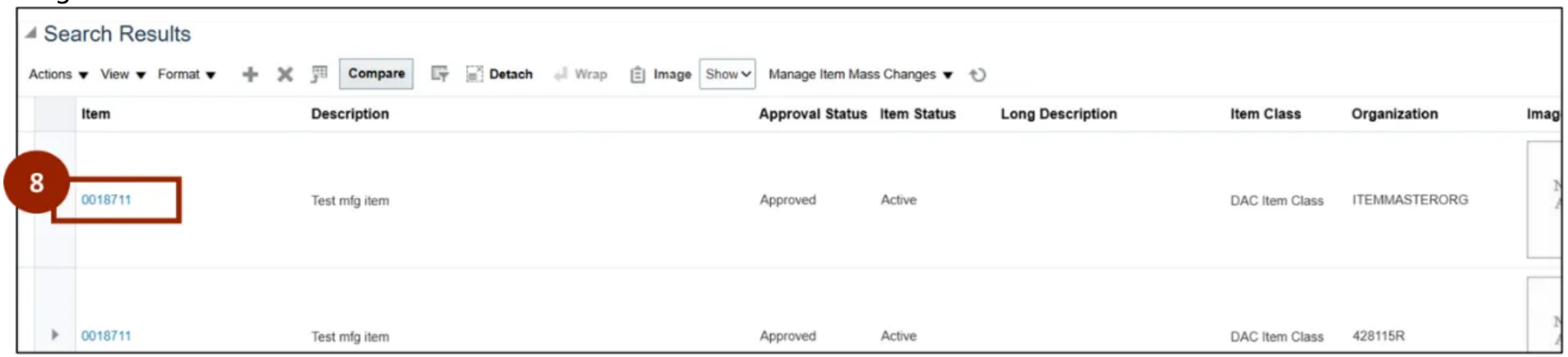
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Step 8. Within the Search Results section, click the **Item Number** link within the Item column to open the Edit Item screen for the selected record.

Note: In the Search Results, multiple records may appear—one for the ITEMMASTER ORG and others based on plant associations. Pay close attention to the Organization and Item Status columns, as these areas will indicate whether an item is active or inactive and display the relevant plant information. Carefully review each of the results before selecting an item to update.

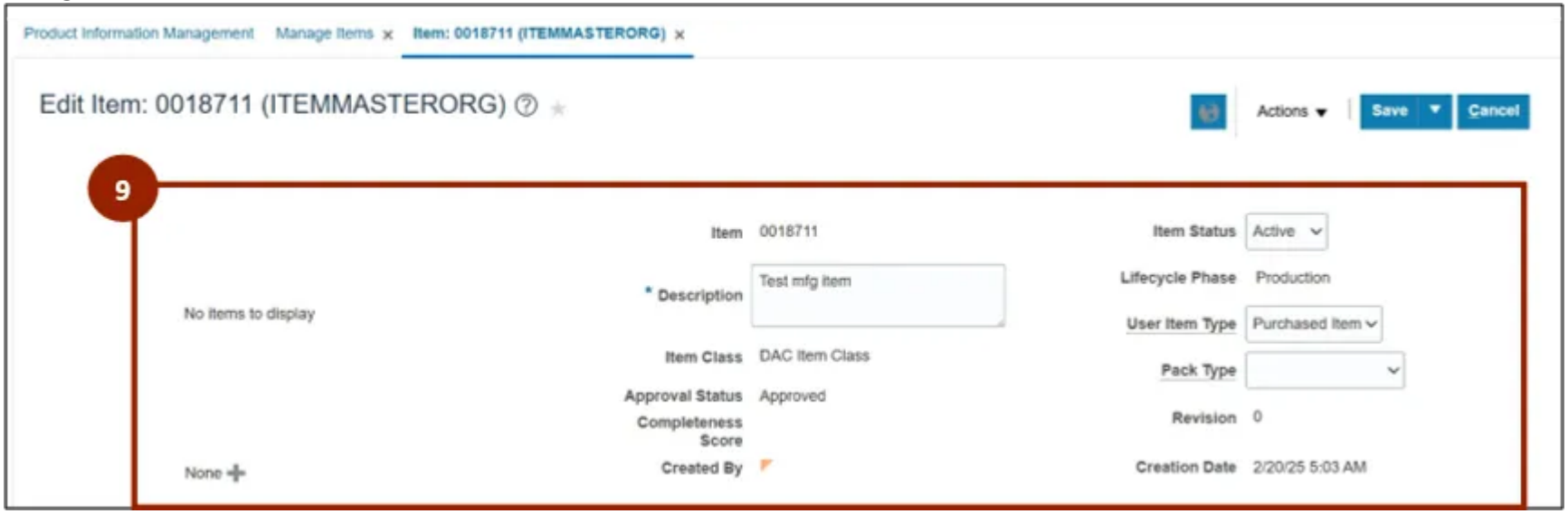
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Step 9. Within the Edit Item screen, update any of the **unlocked fields** to edit the record.

Note: Some fields within the Edit Item screen may be locked or unlocked based on your user role. Make sure you select the correct record to edit item information at either the Master or Plant level. If you cannot edit certain fields, you may not have the required permissions to edit at that level.

Image



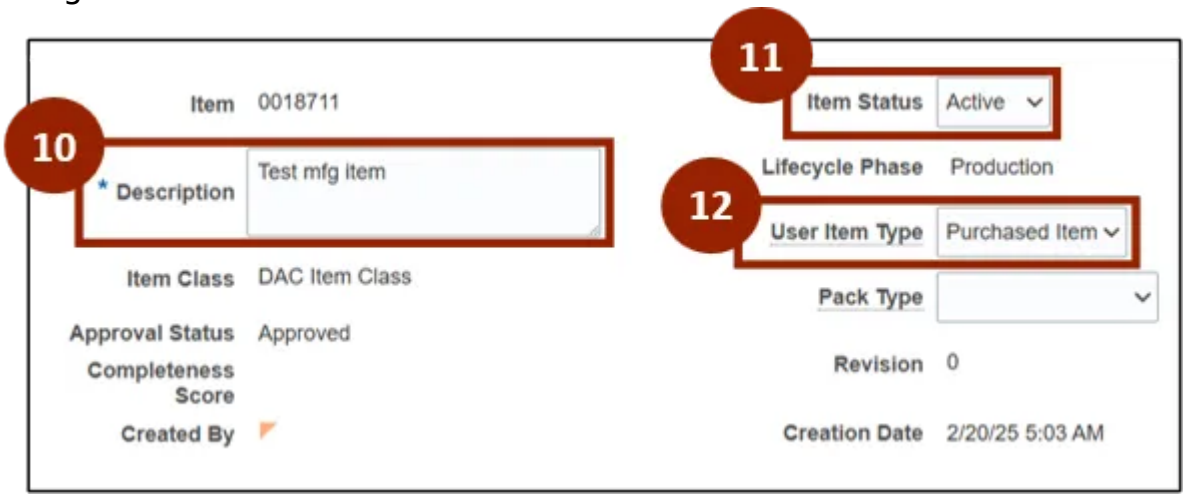
Step 10. To update fields, enter the **revised text** to accurately reflect the new or updated item description.

Step 11. In the Item Status drop-down field, Select the **appropriate status option** from the list (e.g., change from “Active" to “Inactive").

Step 12. The User Item drop-down field Item can be updated to display another type (i.e., MFG Item or Freight).

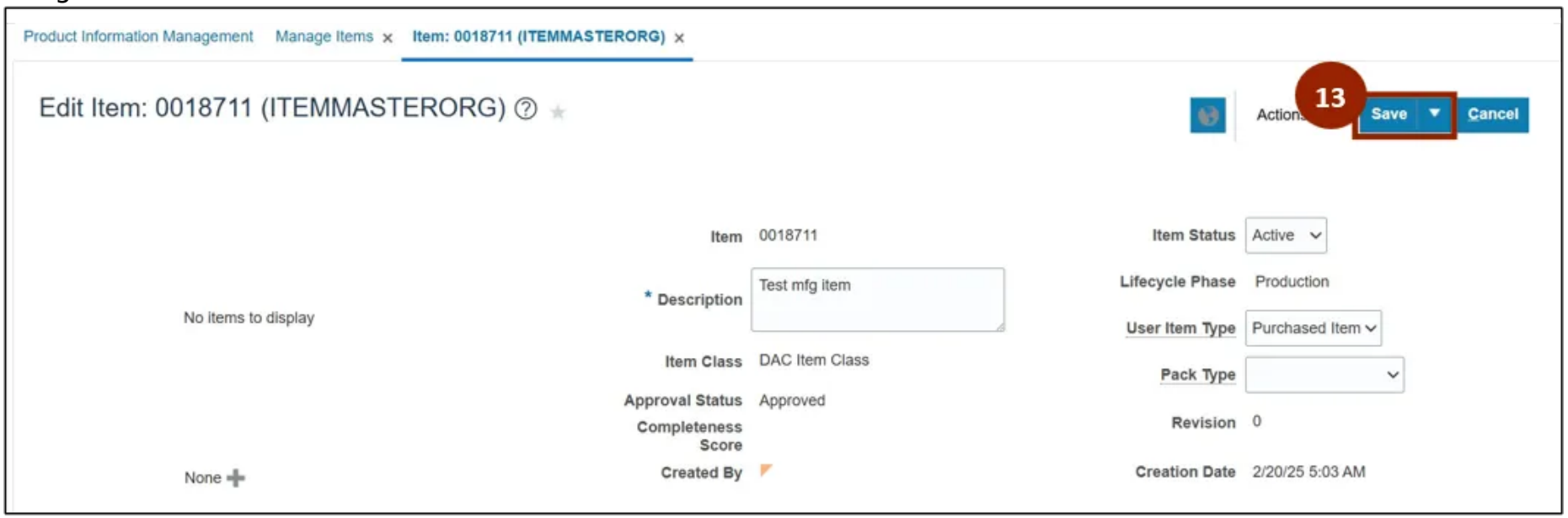
Note: If a change to the User Item Type is needed, it is best practice thttps://www.ncosc.gov/training/ncfs-system-training/ncfs-course-catalog/mfg107-manage-product-master-datao mark the existing **Item Status as Inactive** and create a new item with the desired type to maintain data integrity.

Image



Step 13. Click **Save** once all changes have been completed.

Image



Wrap-Up

NCFS users can create and update product master data using the steps above.

Additional Resources

- Instructor Led Training (ILT)
  - MFG107: Manage Product Master Data
- Web-based Training (WBT)
  - MFG100: Introduction to NCFS Manufacturing
  - MFG101: The Journey Through NCFS Manufacturing

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