MFG-11 Plan Inventory Replenishment

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

There are 17 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**.

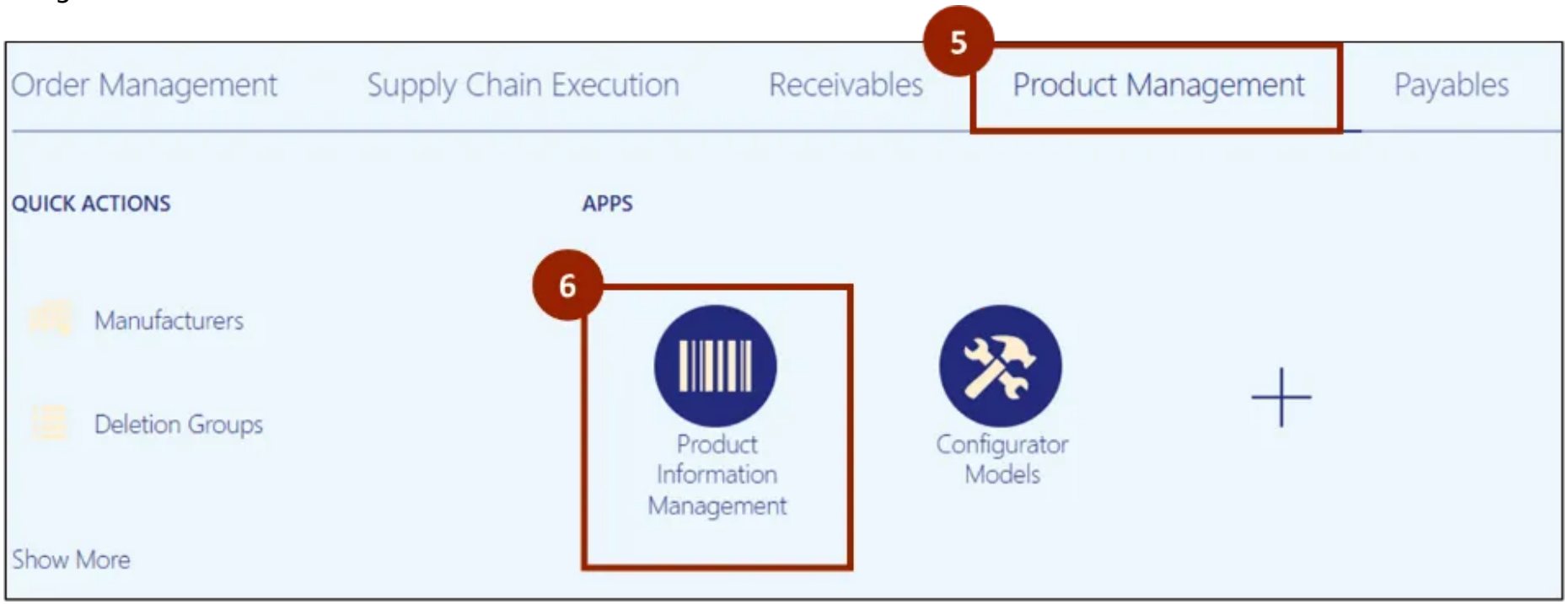
Note: The system will automatically sign on using SSO and log in to NCFS. After the first login using SSO, future access may not require credentials. If SSO is not available, enter credentials manually within the Username and Password fields, then click **Sign-In**.

Step 4. Navigate to the Home page.

Step 5. Click on the **Product Management** tab.

Step 6. Click on **Product Information Management**.

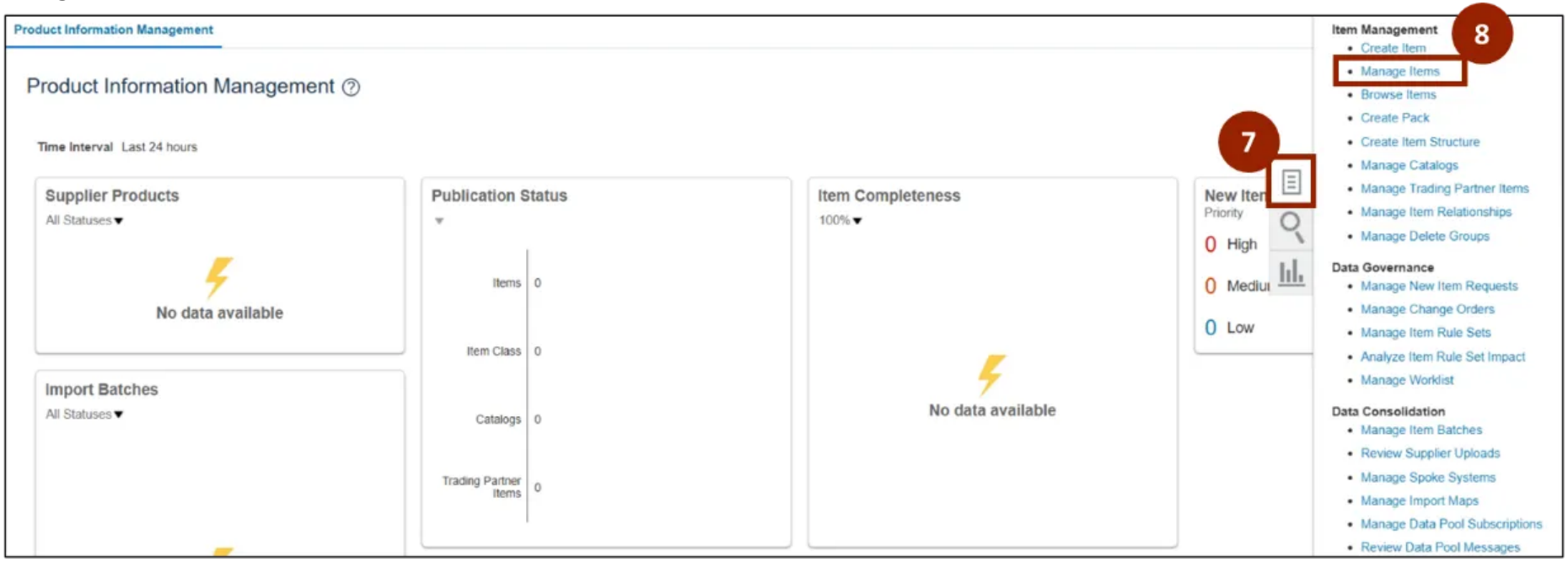
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Step 7. On the Product Information Management page, click the **Task** icon.

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

Image



Step 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.

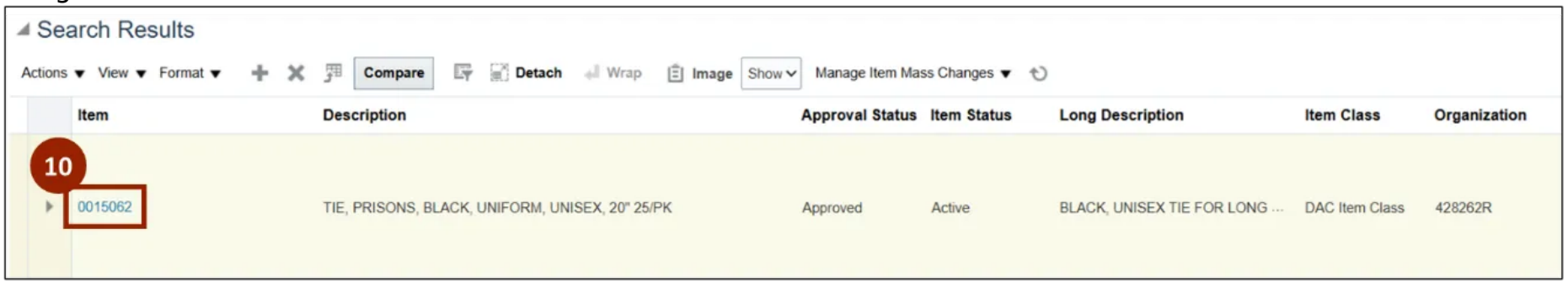
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Step 10. The Search Results table displays, click the desired **Item Number** link to open the Edit Item screen for that item.

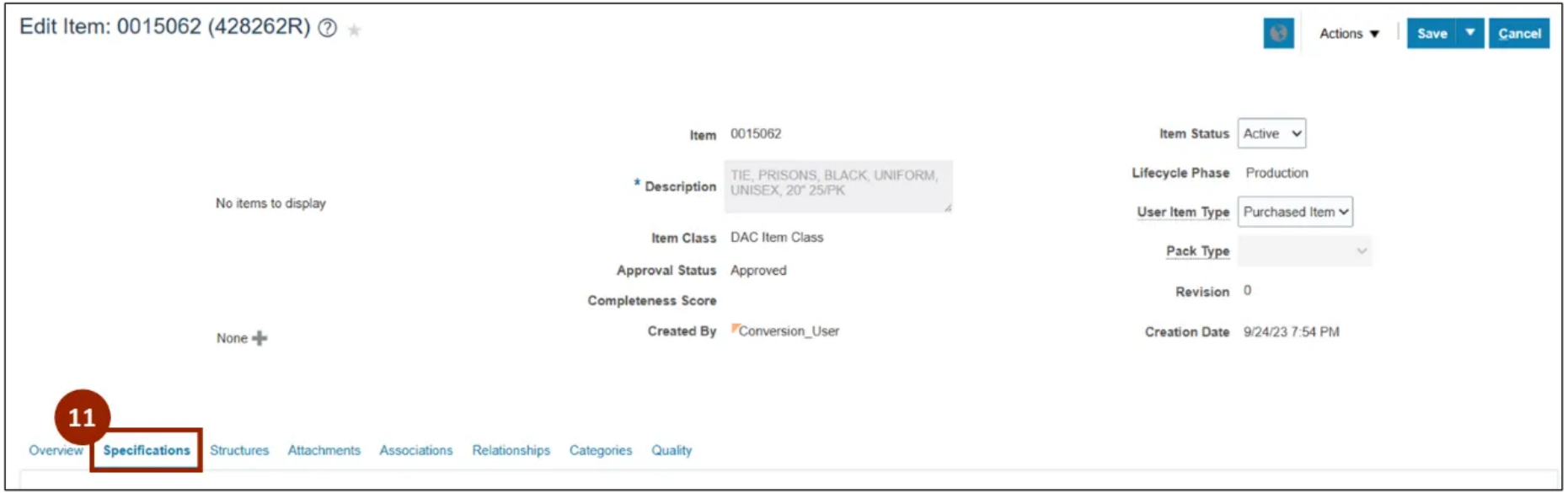
Note: Select the item for the desired Organization. In this example we are selecting the item for Organization 428262R.

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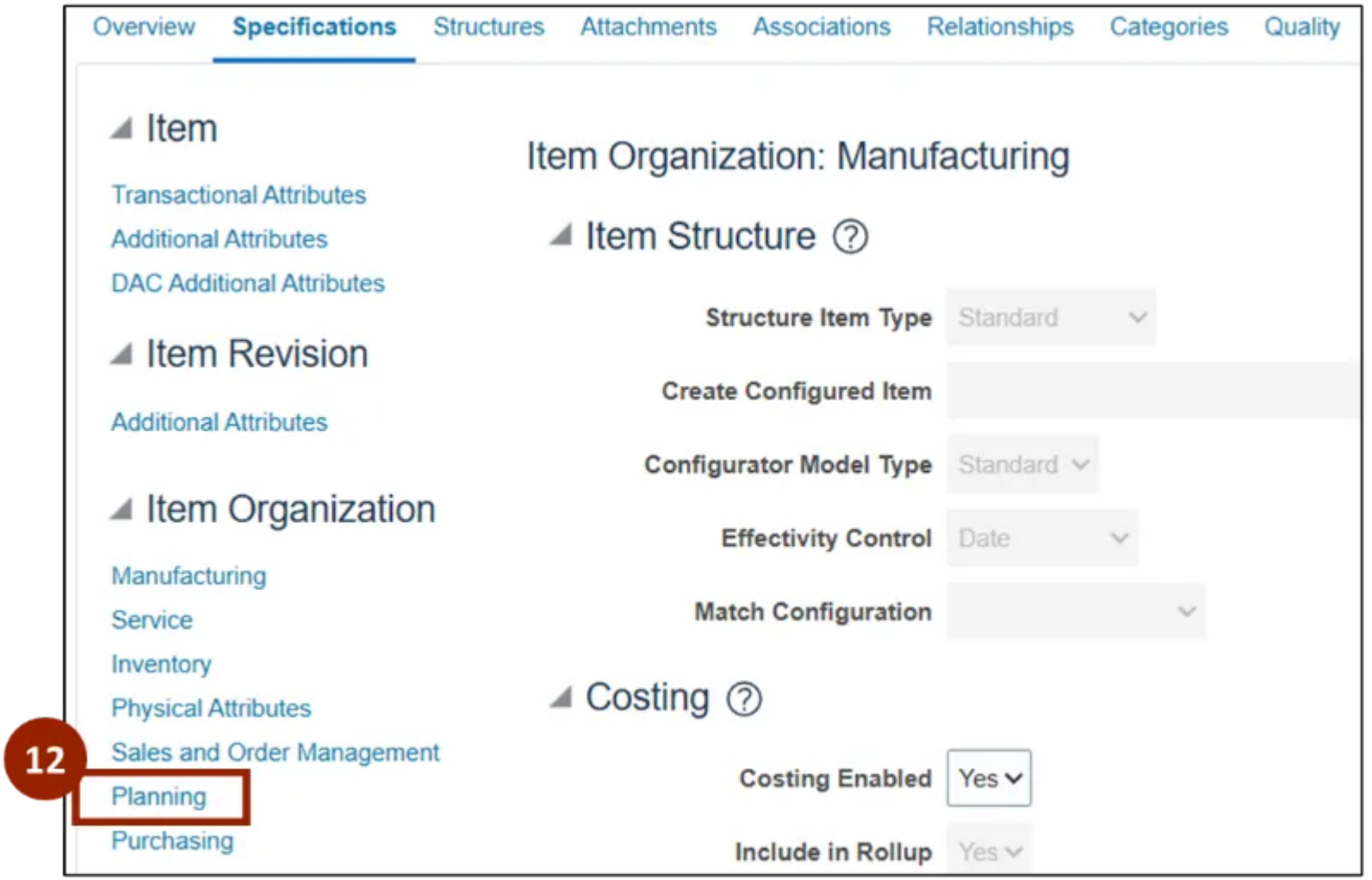
Step 11. Within the Edit Item screen, click the **Specifications** tab.

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Step 12. Under the Item Organization header, click **Planning**.

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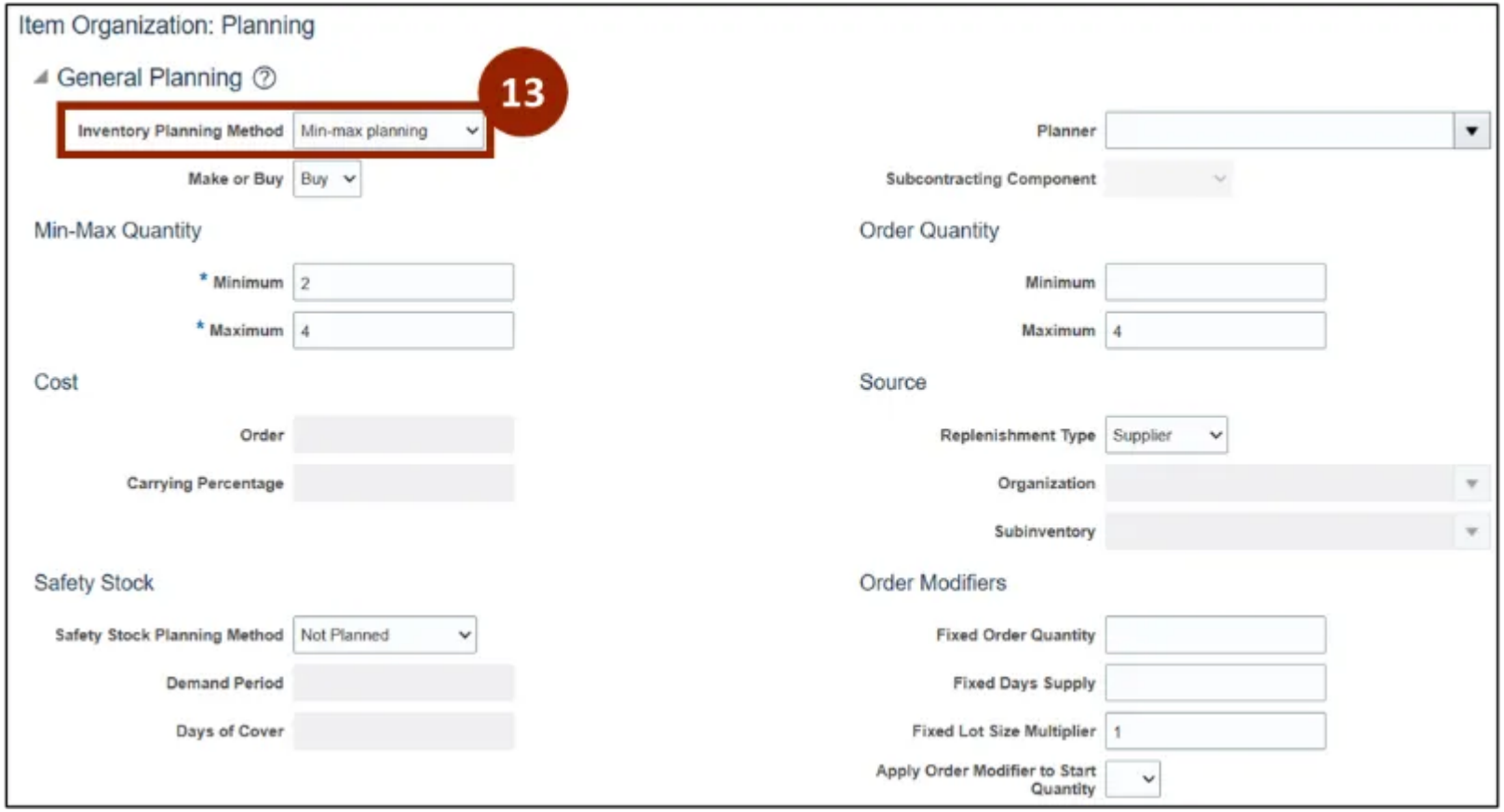


Note: For an item to be included within the Min-Max replenishment process, the item needs to be set with the following parameters.

Step 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.

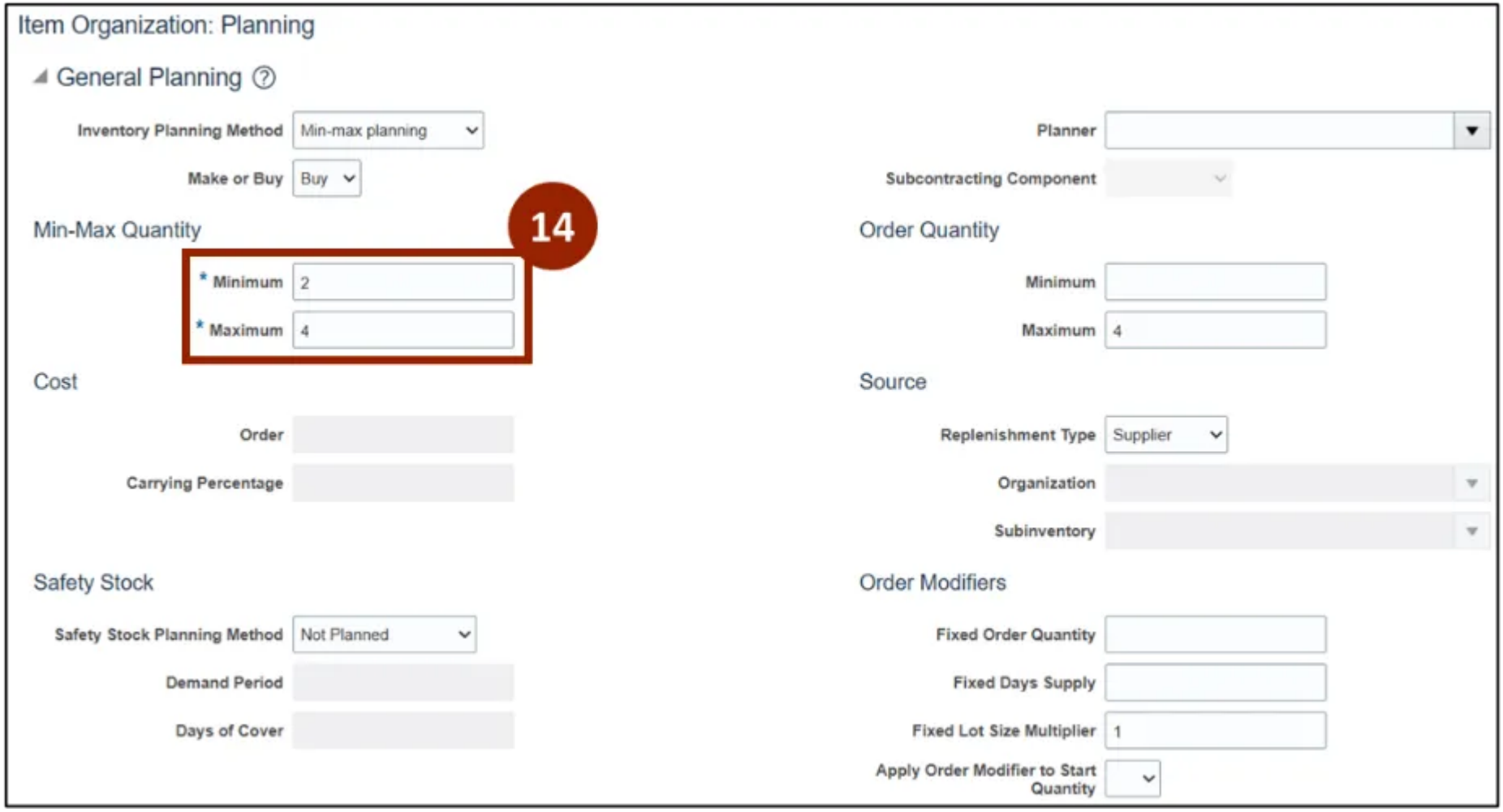
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Step 14. Enter the **Min and Max quantities** in the following fields: Minimum and Maximum. The quantities entered should be based on the Primary UOM.

Step 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.

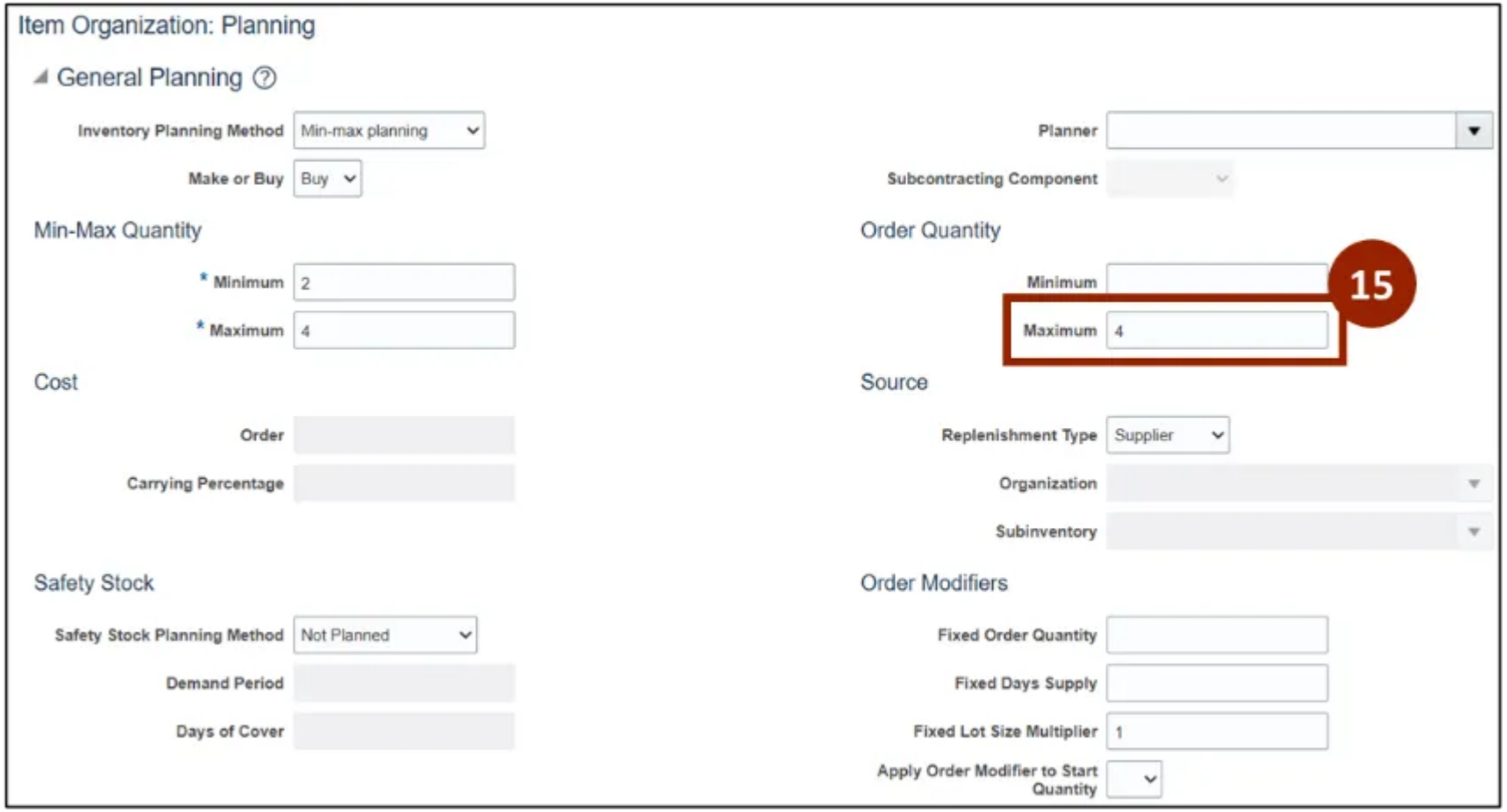
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Step 15. In the Order Quantity section, enter the **Maximum**.

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.

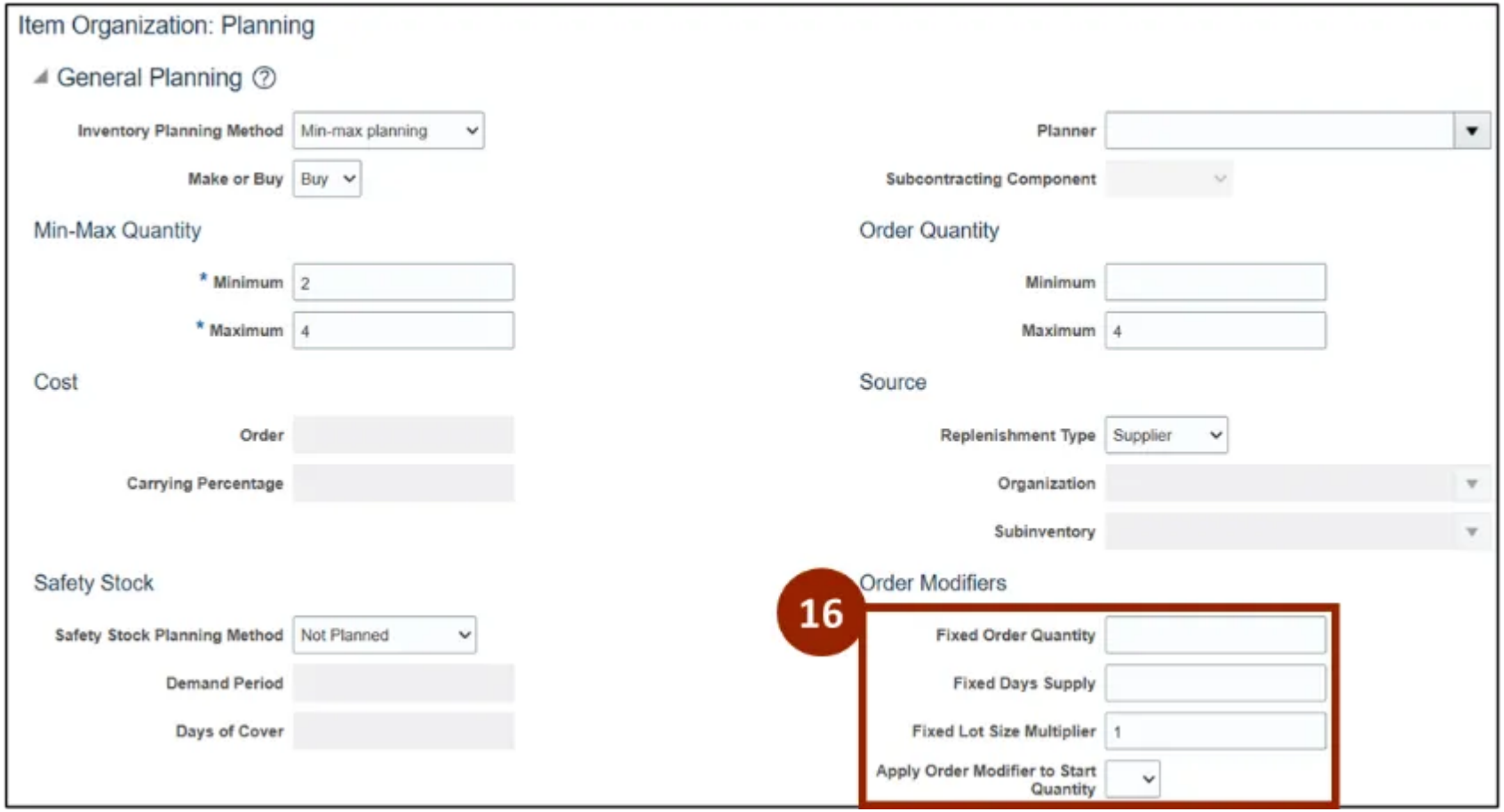
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Step 16. In the Order Modifiers section, enter the **Fixed Lot Size Multiplier**.

Note: The Min-Max Planning uses the Fixed Lot Size Multiplier setting to round reorder quantities.

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

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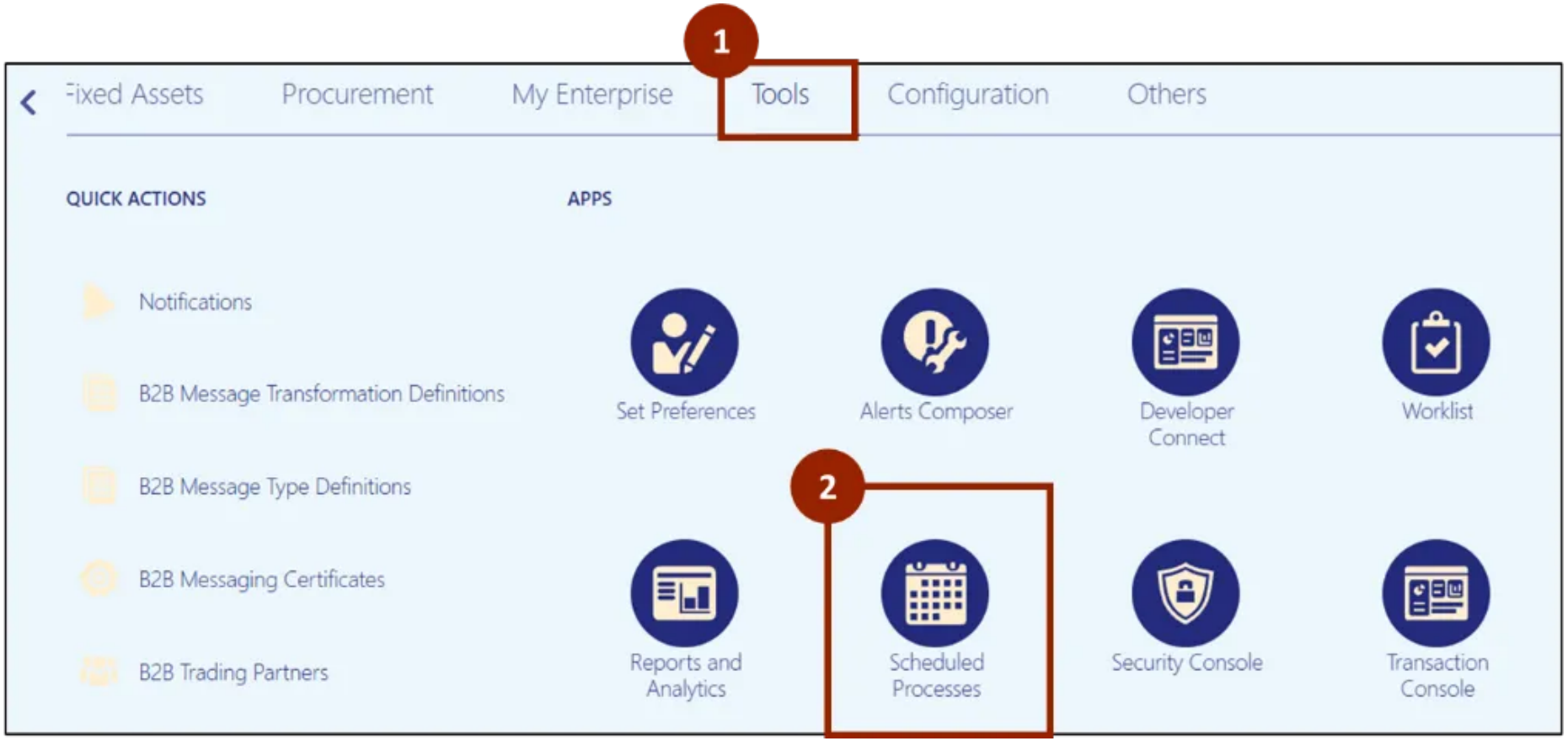
Printing the Min-Max Planning Report

Once logged in to NCFS, follow these steps. There are 17 steps to complete this process.

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

Step 2. Click **Schedule Processes**.

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

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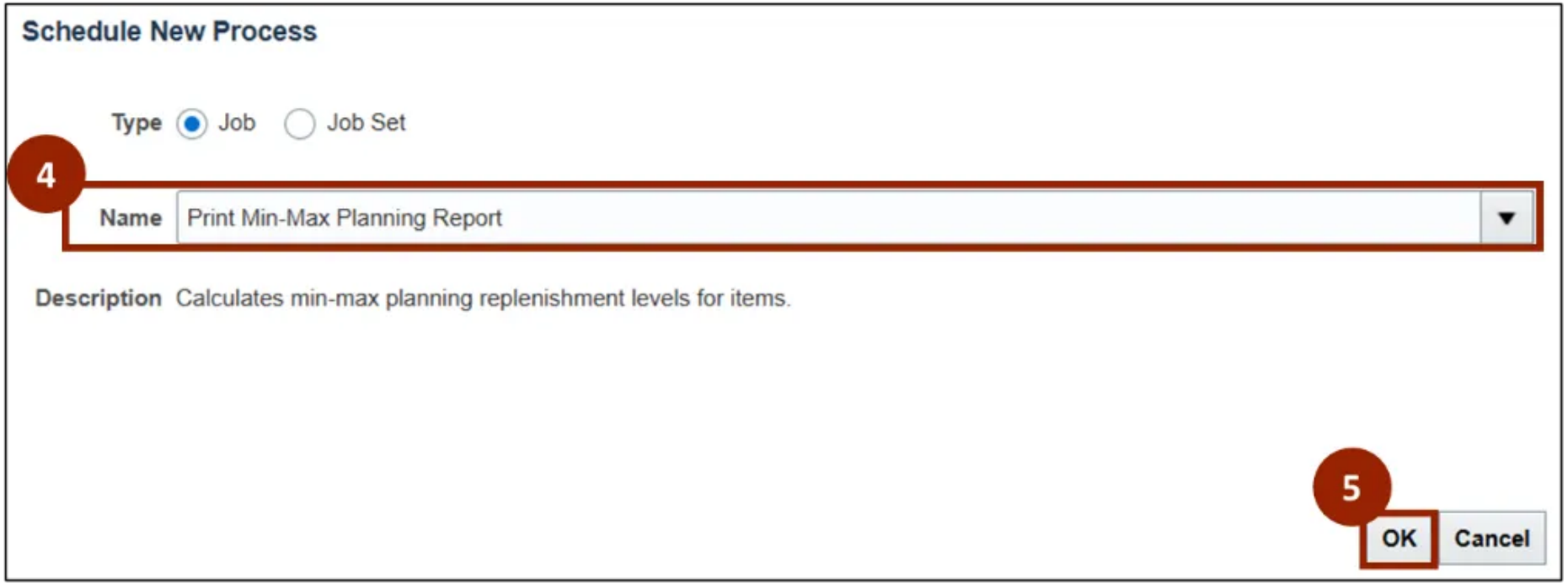


Step 4. In the Name field of the Schedule New Processes pop-up window, enter or search **Print Min-Max Planning Report**.

Step 5. Click **OK**.

Note: Once the appropriate Job Name is selected, the Description field automatically populates.

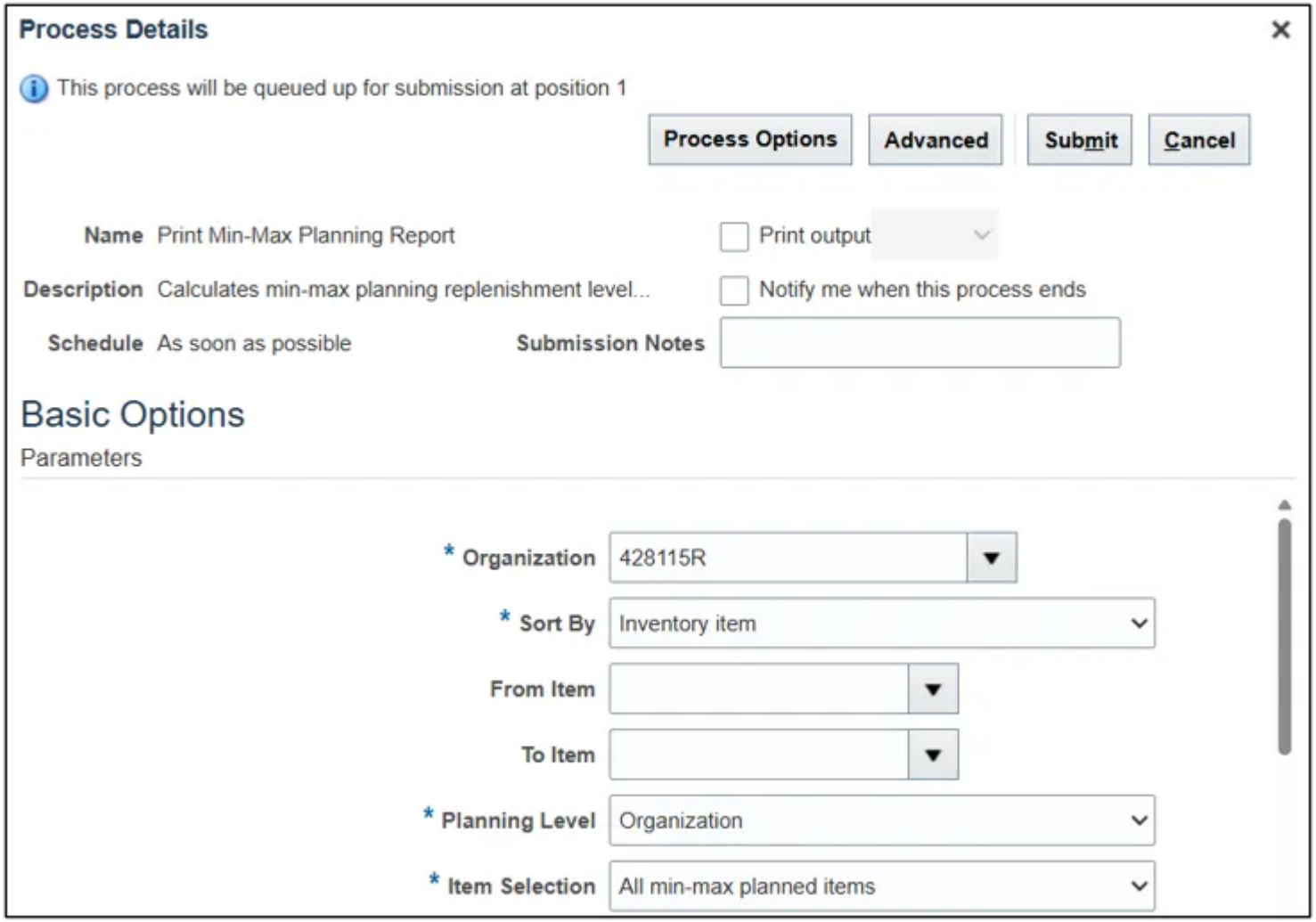
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The Process Details screen displays basic options for the Min-Max report parameters, the Parameters section determines what specific areas are included within the report.

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.

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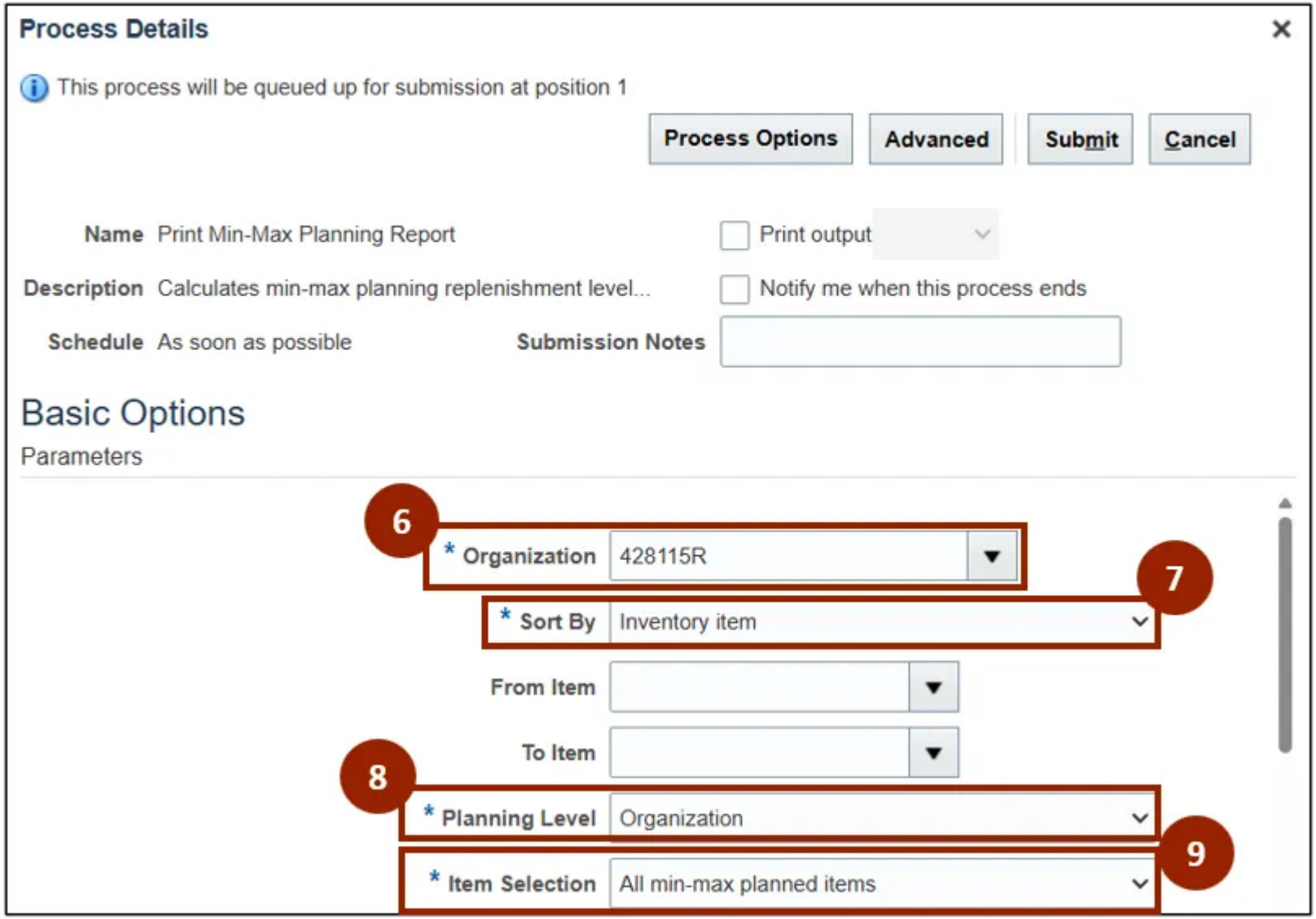
Step 6. In the Organization field, enter or search for the **appropriate organization** option (i.e., 428262R).

Step 7. In the Sort By field, select **Inventory Item**.

Step 8. In the Planning Level field, select **Organization**.

Step 9. In the Item Selection field, select **All min-max planned items**.

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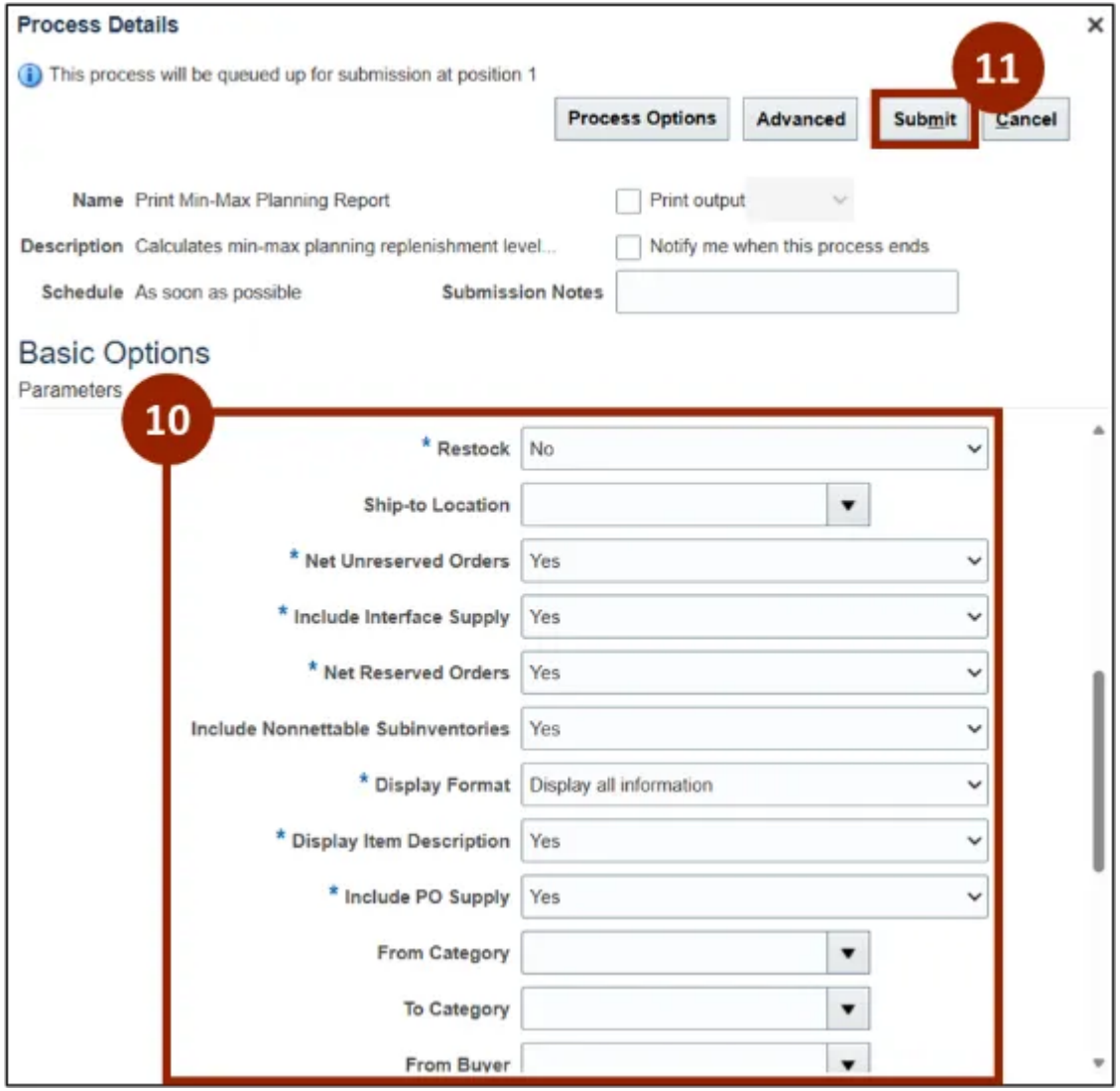


Step 10. All other fields displayed can be left as their **defaulted selections**.

Note: The restock should be set to No and all other Parameters can be adjusted to fit the desired report output.

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

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

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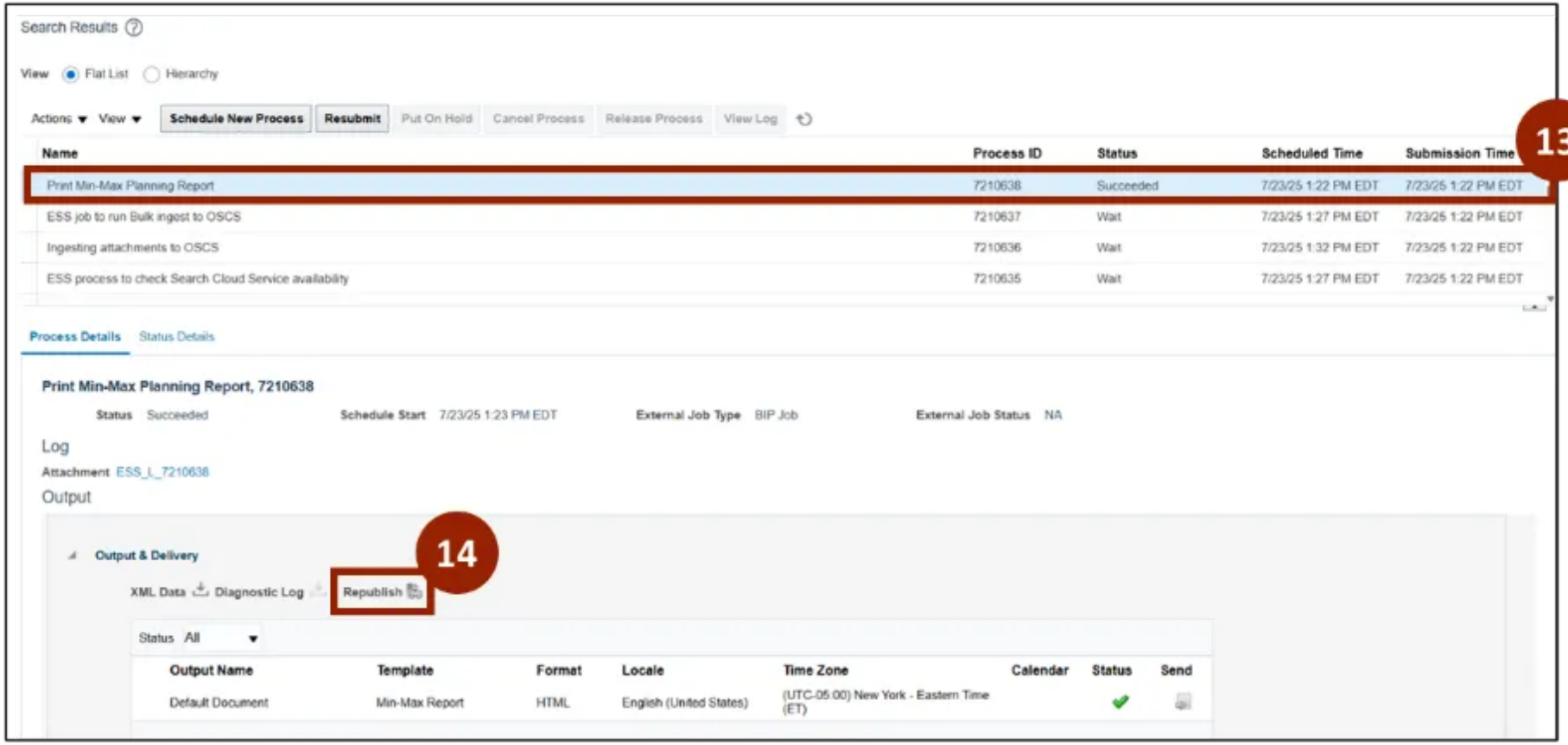


The Scheduled Processes overview screen now displays the Print Min-Max Planning Report information within the table.

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

Step 14. Click the **Republish** icon.

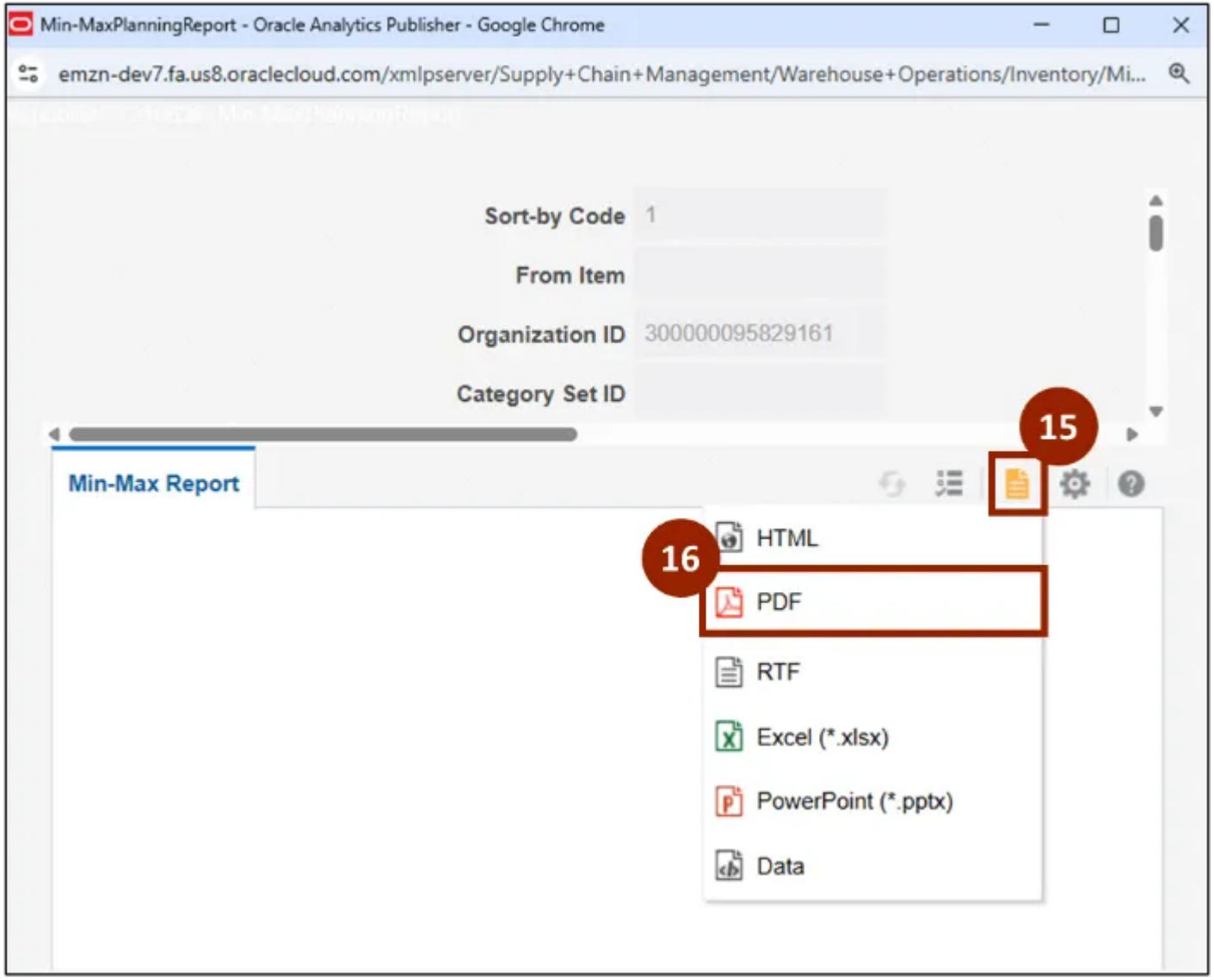
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Step 15. Within the Min-Max Planning Report window, Click the **View Report** icon.

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

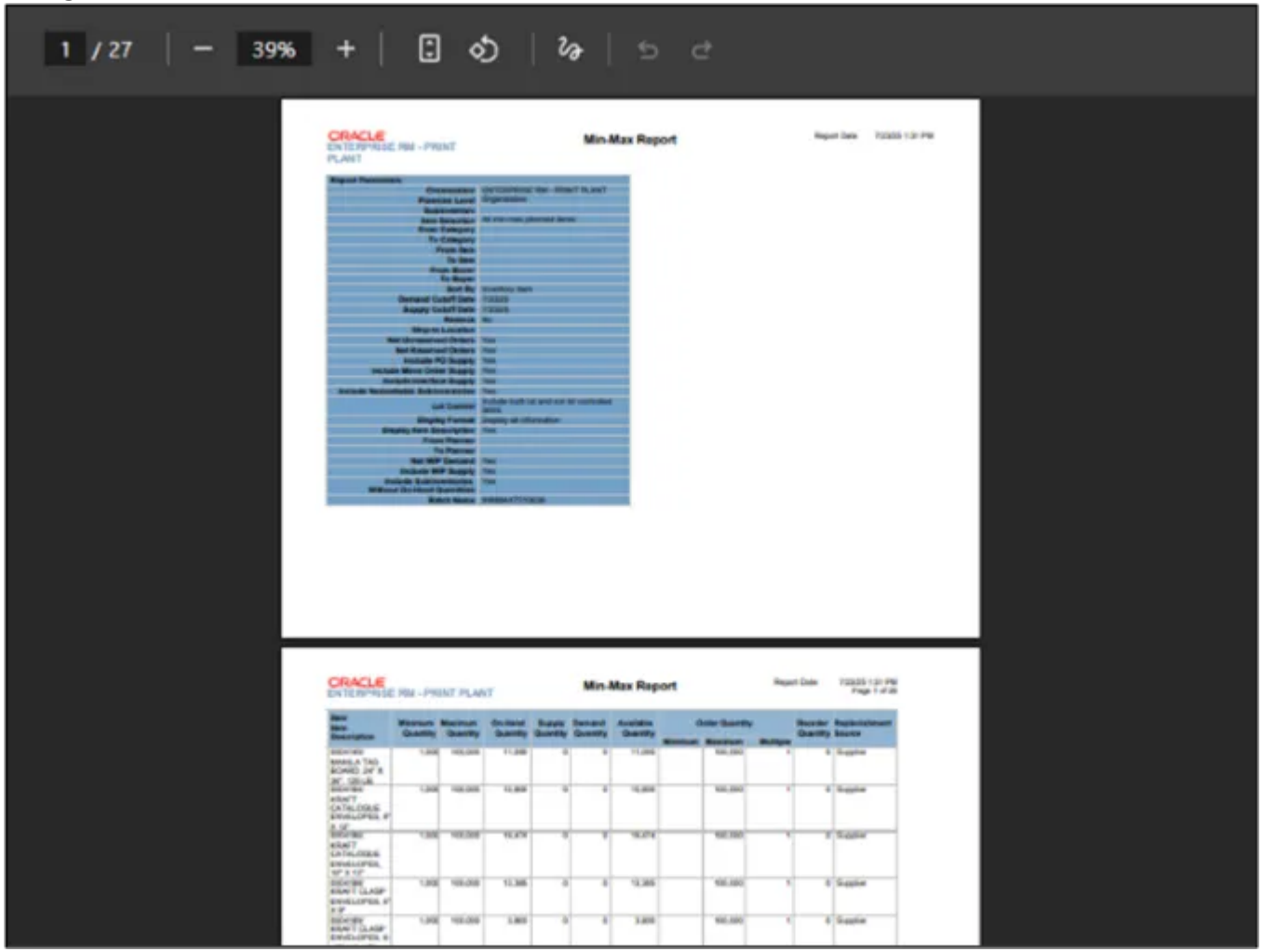
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Step 17. The Min-Max Planning Report generates in PDF format, displaying all relevant information according to the parameters selected. Review all information within the report before moving forward with a new process.

Note: You can download or print the report directly from your browser window.

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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

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