



**ORCHESTRA**

# OCloud Item Master Data Practice Lab



## Overview

While your Implementation Consultant will make sure to add in all the item and inventory information you sent them, as time goes on, it's going to be necessary to add in new items into the database. Fortunately, it's a simple process.

This lab will walk you through how to add in new malt but adding in any other items works just the same.

In our labs, names of editable fields will be underlined (example: "Click in Item Description"). Clickable items like modules or menus will be **Bolded** (example: "Click on **Modules**"). Key terms for Orchestrated will be *italicized*.

## Exercise 1 – Add a New Malt

### Duplicate a Like-Type Item

Because we enter in so much information about each item that remains the same across all items of that type (for example, all malts), the best practice is to duplicate the last item of that type in your inventory. This way all those fields and all that information will copy over, and you won't have to worry about any of it being lost.

1. Open Modules > Inventory > Item Master Data or click it in your Common Functions box if you have already added it.

The *Item Master Data* window opens. Note that all fields are yellow; that means you're in *Find Mode*; those yellow fields are all searchable.





## ITEM MASTER DATA

If you haven't added it to your cockpit yet, we recommend you do so now. It'll come in handy often!

2. In the Item Number box, type "RM" and press the <ENTER> key or click Find. This'll bring up a list of all Raw Materials: Malt items.

3. Select the last malt in the list. (In this image, it's RM5044 – Malt Wheat) Click Choose or press <ENTER> This will open the item and display all the info that has been entered about it.





## ITEM MASTER DATA

As you can see if you click through the tabs, there's a lot of information entered about this malt!

Rather than try to painstakingly recreate all this on our new malt, we'll duplicate it and bring all that info over automatically.

Right click on any of the gray area and select Duplicate. All the information of the previous item has been pulled to the new one!

Click in the Item Number box and increase the item number by 1. (In this

- Put the name of you new malt in the Description box
- Make sure Pack Type is set correctly. For malts, UoM – Pound is typical.
- Press <ENTER> or click Add
- Press <ESC> or click Cancel to close the Item Master Data window.

## Exercise 2: Add a new hop

Now that you've successfully added a new malt, try it again below with a new hop. If you need a hint, the steps are listed below. Try it without them first, though.

Exercise steps:

- Open the *Item Master Data* function.



2. Find the last entry of a similar item (a hop in this case.)
  - a. Remember, you can quickly find an item type if you remember its item code. What's the item code prefix for 'raw material: hops'?
3. Choose the last hop in the list
4. Right click and choose Duplicate
5. Increase the item number by 1.
6. Change the name under Description to the new hop name. Keep the formatting consistent with how your other hops are names.
7. Check that the Pack Type is correct.
8. Press <Enter> or click Add
9. To exit the window, press <ESC> or click Cancel

How did you do? If you had to check the sheet or look at the diagrams, that's ok, just practice some more until you've got it!