

Inventory Item Deletion

QUICK REFERENCE GUIDE INV-46

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation on how to Delete an Inventory Item that is associated to an Inventory Organization in <u>error</u> in the North Carolina Financial System (**NCFS**).

Introduction and Overview

This QRG covers an explanation on how to delete an inventory item that is associated to an Inventory Organization in <u>error</u> in NCFS. By deleting the item, the item is removed and will no longer be tracked within that specific inventory organization.

Inventory Item Delete

To delete an inventory item in NCFS, please follow the steps below:

- 1. Log in to the NCFS portal with your credentials to access the system.
- 2. On the **Home** page, under the **Product Management** tab, click the **Product Information Management** app.





3. Click the Tasks [] icon and select Manage Delete Groups.

					∩ ⊀	ን F	-	<mark>С.</mark> 913	TS
Product Information Management Product Information Management ⑦					Item Manag • Create • Manag • Browse	jement Item je Items e Items	3		
Time Interval Last 24 hours					Create Create Manag	Pack Item S ⁴ ge Catal	tructure	е	
Supplier Products All Statuses ▼	Publication S	itatus	Item Completeness	E Q	Manag Manag Manag	ie Tradii ie Item	ng Part Relatio	tner Items	s
	Items	0		<u>lıl.</u>	Data Gover • Manag • Manag • Manag	nance le New l le Chan ge Item	Item Re Ige Orc Rule S	equests ders Sets	

4. Click the **Create** button [+] to create a Delete Group.

Manage Delete	e Groups ⑦							D <u>o</u> ne
Advanced Se	earch				Sa	ved Searc	h	~
							** At least on	e is required
** Name	Starts with V		** Last Activity	Equals		~		~
** Description	Starts with		** Last Activity Status	Equals		~	~	
** Status	Equals 🗸	~						
				Search	Reset	Save	Add Fields 🔻	Reorder
Search Results								
Actions 🔻 View 👻	Format 🔻 🕂 🖉 🗶 💯	Freeze 📄 Detac	h 📣 Wrap					
Name	Description	BPEL	Instance Status	Last Submiss Date	ion	Last Ac	ctivity Last	Activity Is
No search conducted.								



5. Name the **Delete Group.** In this example, the group was named **Test Delete Group.** Add a **Description** if desired. Then, click the **Select and Add** button.

		JR
Product Information Management Manage Delete Groups x Create Delete Group x		
Create Delete Group	Check Constraint Save Submit Cancel	
Delete group can process twenty thousand records at a time. To delete more records, create multiple delete groups with a maximum of twenty thousand records in each group and submit them for deletion. * Name Test Delete Group		
Items Item Structures Change Orders New Item Requests Actions ▼ View ▼ Format ▼		<u>lıl.</u>
Item Item Description Organization Organization Supplier Address Name	Status Details	

6. Search for the item to be deleted by using the search fields, then click **Search.** Select the item within the Search Results, then click **Apply.** When the item(s) to be disassociated are selected click Apply, then click **Done.**

In this example, item 0010579 was chosen.

Select and Add: Items		×
Entity Item	•	
Search		A <u>d</u> vanced
** Item 00105	579 ** Keyword	
** Description		
		Search Reset
Search Results		
View View Format View	Detach Wrap	
View Format	Detach Wrap Description	Revision Code
View Format View View View View View View View View	Detach Wrap Description INMATE PANTS, GREEN, MED 31 - 35, 6 PER BOX	Revision Code
View View Format View Item Item 0010579 Columns Hidden 368	Detach Wrap Description INMATE PANTS, GREEN, MED 31 - 35, 6 PER BOX	Revision Code
View View Format View Item Item 0010579 Columns Hidden 368	Detach Wrap Description INMATE PANTS, GREEN, MED 31 - 35, 6 PER BOX	Revision Code
View View Format View Item	Detach Wrap Description INMATE PANTS, GREEN, MED 31 - 35, 6 PER BOX	Revision Code
View Format For	Certiption INMATE PANTS, GREEN, MED 31 - 35, 6 PER BOX	Revision Code

NCFS

7. Double click the item line to edit the item fields. From the **Organization Name** drop-down list, choose the Inventory Organization to delete the item from.

ate Delete	Group Test Delete Group				Check Constraint	Save Sub <u>m</u> it
e group can proc	ess twenty thousand records at a time. To delete more records, create multiple	delete groups with a maximum of twenty thousand records in	n each group and submit	them for deletion.		
	* Name Test Delete Group			Description Test Delete Group		
					4	
					4	
ns Item Structu	ures Change Orders New Item Requests				4	
ns Item Structu	ures Change Orders New Item Requests	1.00-0			<u></u>	
ns Item Structu ctions View	ures Change Orders New Item Requests ▼ Format ▼	ed Wrap	_			
ns Item Structu ctions v View Item	ures Change Orders New Item Requests ▼ Format ▼	el Wrap Organization Name	Organization	Supplier Address Name		tatus Det

8. Click **Save.** Then click **Check Constraint**. Constraints are reasons that prevent the item from being deleted. Example: Completed Transaction activity.

ct Information Mar	nagement Manage Delete Groups × Create Delete Group ×					
eate Delete	e Group Test Delete Group				Check Constraint	Sub <u>m</u> it <u>C</u> ano
ete group can proc	cess twenty thousand records at a time. To delete more records, create multiple	delete groups with a maximum of twenty thousand record	Is in each group and submit	t them for deletion.	_	
	•			Description Test Delete Group		
	* Name Test Delete Group					
	* Name Test Delete Group				A	
ems Item Struct	* Name Test Delete Group				Δ	
Actions • View	 ^ Name Test Delete Group tures Change Orders New Item Requests ✓ Format ✓ ■ ■ X 野 ■ Freeze ■ Detach 				A	
Actions View	 Name Test Delete Group tures Change Orders New Item Requests Format ▼ ■ ■ ★ 野 ■ Freeze Detach Item Description 	طاً Wrap Organization Name	Organization	Supplier Address Name	<u>A</u> Status	Details
Actions View	^ Name Test Delete Group tures Change Orders New Item Requests ✓ Format ✓ ■ ▲ F Image: Freeze Image: Detach Item Description INMATE PANTS, GREEN, MED 31 - 35, 6 PER BOX	Wrap Organization Name ALBEMARLE - CLOTHING WARE	Organization HOU v 424580C	Supplier Address Name	∑ Status ✓ Open	Details

9. An Information Window will appear, click OK.

Information	×
The Test Delete Group delete group has been saved and was submitted for checking con	straints.
	0 <u>K</u>



10. The Item Delete Group **Status** in the Delete Group will show **In Progress** while checking constraints.

ct information ivia	anagement Manage Delete Groups × Edit Delete Group ×							
lit Delete (Group Test Delete Group					Check Constraint	Save v S	Sub <u>m</u> it <u>C</u> ancel
ate group can pro	ocess twenty thousand records at a time. To delete more records, create multiple Name Test Delete Group	e delete groups with a maximum of twenty thousand records in eac	h group and submit ther De	m for deletion. escription Test Delete Group				
	Hume Test below ordep				4			
ms Item Struc	ctures Change Orders New Item Requests							
ams Item Struc Actions ▼ View	ctures Change Orders New Item Requests	el Wrap			<i>h</i>			
Actions View	tures Change Orders New Item Requests w ▼ Format ▼ ■ ■ ★ 第 ■ ₩ EF ■ Freeze ₩ Detach Item Description	ما Wrap Organization Name	Organization S	Supplier Address	lame	Sta	tus	Details

11. If the Item Delete Group Status shows Errors, click the Details Icon.

Delete Cr	roup Toot Delate Croup						
Delete Gr	oup lest Delete Group				Check	Constraint Save *	Sub <u>m</u> it <u>C</u> ancel
group can proce	ss twenty thousand records at a time. To delete more records, create multiple	e delete groups with a maximum of twenty thousand records in e	each group and submit t	them for deletion.			
	Name Test Delete Group			Description Test Delete Group			
	Hand Tool Delete Group						
					4		
- Item Otmotiv	Charact Onlare - New Item Descurate				ł.		
s Item Structu	res Change Orders New Item Requests				æ		
s Item Structur	res Change Orders New Item Requests				đ		
s Item Structur ttions v View v	res Change Orders New Item Requests ▼ Format ▼ ■ ■ ★ 第 ☞ ■ Freeze ₩ Detach Item Description	ell Wrap Organization Name	Organization	Supplier Address Na	e e	Status	Details
s Item Structu tions v View v Item 0010579	res Change Orders New Item Requests Format ▼ ■ ■ ★ 第 ■ Freeze Detach Item Description INMATE PANTS, GREEN, MED 31 - 35, 6 PER BOX	Wrap Organization Name ALBEMARLE - CLOTHING WAREHOU	Organization V 424580C	Supplier Address Na All Supplier V All Supplier	ne ddresses	Status V Errors	Details

12. The **Error Details Window** will appear with an information message regarding the deletion error(s). Click **Done.**

Error Details	×
View 🔻 Format 💌 🔚 Detach 🚽 Wrap	
Message	
You cannot delete this item because completed inventory transactions exist for this item.	
	D <u>o</u> ne



13. This record cannot be deleted due to completed inventory transactions existing. Highlight the row and click the **"X"** button to remove it from the delete group.

uct Information Management Manage Dele	te Groups × Edit Delete Group ×						
dit Delete Group Test Delet	e Group					Check Constraint Save 🔻	Submit Cancel
ete group can process twenty thousand reco	rds at a time. To delete more records, create multiple delete group	os with a maximum of twenty thousand records in e	ach group and submit f	them for deletion.			
Name Test [elete Group			Description Test D	lelete Group		
ems Item Structures Change Orders	New Item Requests						
Item Item Description	J ²⁰ J ²⁰ Ly Mieze a Detach a wrap	Organization Name	Organization	Supplier	Address Name	Status	Details
	FEN MED 31 - 35 6 PER BOX	ALBEMARLE - CLOTHING WAREHOU	✓ 424580C	All Suppliers 🗸	All Supplier Addresses	✓ Errors	5
0010579 INMATE PANTS, GR	LEN, MED OT 55, OT ENDOX						

14. Add the next item to be deleted to the delete group.

All Designation and the						Û
uct Information Manag	ement Manage Delete Groups × Edit Delete Group ×					
dit Delete Gro	oup Test Delete Group			Check Constraint	Save v Sub <u>m</u> it <u>C</u> an	cel
elete group can proces	s twenty thousand records at a time. To delete more records, create m	nultiple delete groups with a maximum of twenty thousand records in e	ach group and submit them for deletion.			
	Name Test Delete Group		Description Test Delete G	roup		
				li li		
tems Item Structure	s Change Orders New Item Requests					
Actions • View •	Format ▼ ■ ■ X 3 ^{TB} ■ Freeze ■ De	tach ⇔Ĵ Wrap				
Actions View	s Change Orders New Item Requests Format ▼ ■ ■ ★ 第 ☞ ■ Freeze ■ De Item Description	tach ⇔ ^{ll} Wrap Organization Name	Organization Supplier Addr	ess Name S	tatus Details	
Actions View View View View View View View View	s Change Orders New Item Requests Format ▼ ■ ■ ★ 第 ■ ★ 第 ■ Freeze ■ De Item Description Briefs, Disposable, Incontinent, Medium 24PK	tach ell Wrap Organization Name CENTRAL PHARMANCY (MEDICAL - (*	Organization Supplier Addr Y 422046M All Suppliers All S	ess Name S upplier Addresses V 0	tatus Details	

15. Follow **Steps 7-10** above. Once the **Constraints Check** completes and passes the **Status** will show **Ready for Deletion**. Click **Submit**.

		-					
it Delete C	Group Test Delete Group					Check Constraint	Save v Sub <u>m</u> it <u>C</u> ancel
te group can pro	cess twenty thousand records at a time. To delete more records	s, create multiple delete groups with a maximum of twenty thousand records in eac	ch group and submit	them for deletion.			
	N TIDLLO			Description Test	Delete Group		
	Name lest Delete Group						
	Name Test Delete Group				li.		
ns Item Struc	warne rest Leiete Group						
ns Item Struc	Name Test Delete Group				6		
ms_ltem Struc	rvame test ∪elete Group ctures Change Orders New Item Requests	🔛 Detach 🛯 🚽 Wrap			Æ		
ns Item Struc Actions View Item	v v Format v E E E X F F I Freeze Item Description	📓 Detach 🛯 🐗 Wrap Organization Name	Organization	Supplier	Address Name	Status	Details
ns Item Struc ctions View Item 0018596	v ▼ Format ▼ ■ New Item Requests	Detach Wrap Organization Name CENTRAL PHARMANCY (MEDICAL - OTC) - DISTRIBUTION CENTER	Organization 422046M	Supplier All Suppliers	Address Name All Supplier Addresses	Status Ready for Deletion	Details

NORTH CAROLINA OFFICE OF THE STATE CONTROLLER



16. An Information window will appear. Click OK.

1 Information	×
The Test Delete Group delete group was submitted for o	leletion.
	0 <u>K</u>

17. Navigate to the **Mange Delete Groups** screen and the Delete Group **Last Activity** will show **Delete Group Submission** and **Last Activity Status Completed**.

	D <u>o</u> ne
Saved Search	• •
	_
Last Submission Date Last Activity	Last Activity Status
	Completed
	ated 2/29/24 Delete Group Submission

18. Navigate to Manage Items task. Select the Item Class. Enter the Item number into the Item field. Click Search. The deleted item should not be associated with the Inventory Organization (warehouse) selected for deletion.

uy	je Items 🕜	DAC Item Class	·						D <u>o</u> n
٩d	vanced Searc	h							Saved Search Application Default
	** Item Star	ts with 🗸 0018596	** Keyword						
**	Description Star	ts with 🗸							
								Se	arch Reset Save Add Fields
ea	rch Results								
ns r	▼ View ▼ Form	ltem	Bescription	Manage Item Mass Change	is ∎tem Status	Long Description	Item Class	Organization	Primary Unit of
									Measure
	No Image	0018596	Briefs, Disposable, Incontinent, Medium 24/PK	Approved	Active	Briefs. Disposable. Incontinent. Me	DAC Item Class	ITEMMASTERORG	PACK
	11/unubic								
		_							
	No Image Available	0018596	Briefs, Disposable, Incontinent, Medium 24/PK	Approved	Active	Briefs, Disposable, Incontinent, Me	DAC Item Class	5200DACNI	PACK
	No Image Available	0018596	Briefs, Disposable, Incontinent, Medium 24/PK	Approved	Active	Briefs, Disposable, Incontinent, Me	DAC Item Class	5200DACNI	РАСК
	No Image Available	0018596	Briefs, Disposable, Incontinent, Medium 24/PK	Approved	Active	Briefs, Disposable, Incontinent, Me	DAC Item Class	5200DACNI	PACK
	No Image Available No Image Available	0018596	Briefs, Disposable, Incontinent, Medium 24/PK Briefs, Disposable, Incontinent, Medium 24/PK	Approved	Active	Briefs, Disposable, Incontinent, Me Briefs, Disposable, Incontinent, Me	DAC Item Class	5200DACNI 5200DACCENI	РАСК



Wrap-Up

This QRG covers an explanation on how to delete an inventory item in NCFS added in <u>Error</u>. By deleting an inventory item, the item is no longer associated with the Inventory Organization selected for deletion and transactions cannot be performed with the item.

Additional Resources

• INV 109: Inventory Item Maintenance (ILT)

