

INVENTORY ITEM STATUS MASS

UPDATE

QUICK REFERENCE GUIDE INV-56

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation on how to Mass Update the Inventory Item. This includes updating the item status to Active or Inactive for Inventory Items using a spreadsheet in the North Carolina Financial System (**NCFS**).

Introduction and Overview

This QRG explains how to mass update inventory items status to Active or Inactive. By updating the item status for an inventory item, certain transactions can or cannot be performed with the item. The Item Maintenance user role (NC Item Maintenance JR) will have access to update the Inventory Item Status via Spreadsheet. If an Item has previous inventory transaction activities of any kind, then the item cannot be disassociated, and the item status needs to be made as inactive in the Inventory Organization(s).

Updating the Inventory Item Status via Spreadsheet

To update an inventory item status 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.



INV



3. Under the Tasks Menu, click Manage Items.

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Pro	duct Information Management						Item Management Create Item
F	Product Information Management ⑦						Manage Items Browse Items
	Time Interval Last 24 hours						Create Pack Create Item Structure
	Supplier Products	Publication	Status	Item Completeness	Import Batches	Ξ	Manage Catalogs Manage Trading Partner Items
	All Statuses ▼	Ψ		100% -	All Statuses ▼	Ő	Manage Item Relationships Manage Delete Groups
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- 4. Select the Item Class for your Business Unit.
- 5. Enter Item number in the Item field.
- 6. Click the **Search** button.

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7. Click on a row and to select all records, Use Ctrl+A button on keyboard.

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- 8. Click on Actions.
- 9. Select Manage Item Mass Changes and then select Edit Item Attributes in Spreadsheet.

Product Information Management Manage Items ×								
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Export to Excel Create Item Structures from Common								
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Compare Edit Item Attributes in Spreadsheet Edit Item Attributes								
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10. An **Edit in Spreadsheet window** will appear. Click the **Download** button and save the spreadsheet to a local folder on your computer. (DO NOT OPEN SPREADSHEET AT THIS <u>STEP).</u>





- 11. Once the spreadsheet is downloaded, before opening the file, select the spreadsheet on your computer and right-click the file and select **Properties**.
- 12. Under the **General** tab click the "**Unblock**" checkbox to unblock security.
- 13. Click the **Apply** button and then click the **OK** button.

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- 14. Open the spreadsheet from your computer.
- 15. Click Enable Content on the Excel spreadsheet if necessary.

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17. Remove the rows for any Organizations you wish to keep the item status active for. If inactivating the item for all Organizations, remove the row for ITEMMASTERORG from the file which does not require item status update. By Right clicking on the row and selecting delete.

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2	Spoke System Name	Product Information	Management Data Hu	b		Language	American English					
3								_				
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5			ORANGE JUICE, UNSV	Active	GRADE A. USDA CERT	DAC Item Class	ITEMMASTERORG	CASE	0001866	17		
6			ORANGE JUICE, UNSV	Active	GRADE A. USDA CERT	DAC Item Class	423730F	CASE	0001866	-		
7			ORANGE JUICE, UNSV	Active	GRADE A. USDA CERT	DAC Item Class	423740F	CASE	0001866			
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11			ORANGE JUICE, UNSV	Active	GRADE A. USDA CERT	DAC Item Class	423980F	CASE	0001866			
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14			ORANGE JUICE, UNSV	Active	GRADE A. USDA CERT	DAC Item Class	423010F	CASE	0001866			
15			ORANGE JUICE, UNSV	Active	GRADE A. USDA CERT	DAC Item Class	423011F	CASE	0001866			
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18. Update the status to	"Inactive"	or "	Active"	in column	'D ' for	each row	desired f	or status
updating.								

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1	Item Batch Name	Mass Change Interna	l Batch : 2024-01-11 14	:14:19.19		Import Map	SMARTMAP_1069128	915	
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7			ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERT	DAC Item Class	423805F	CASE	0001866
8			ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERT	DAC Item Class	423930F	CASE	0001866
9			ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERT	DAC Item Class	423931F	CASE	0001866
10			ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERT	DAC Item Class	423980F	CASE	0001866
11			ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERT	DAC Item Class	424110F	CASE	0001866
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16			ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERT	DAC Item Class	423070F	CASE	0001866
17			ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERT	DAC Item Class	423080F	CASE	0001866
18			ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERT	DAC Item Class	423085F	CASE	0001866
19			ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERT	DAC Item Class	423095F	CASE	0001866
20			ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERT	DAC Item Class	423100F	CASE	0001866
21			ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERT	DAC Item Class	423305F	CASE	0001866
22			ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERT	DAC Item Class	423306F	CASE	0001866
23			ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERT	DAC Item Class	423400F	CASE	0001866
24			ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERT	DAC Item Class	423500F	CASE	0001866
25			ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERT	DAC Item Class	423600F	CASE	0001866
26			ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERT	DAC Item Class	423601F	CASE	0001866
27			ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERT	DAC Item Class	423710F	CASE	0001866
28			ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERT	DAC Item Class	423720F	CASE	0001866
29			ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERT	DAC Item Class	424430F	CASE	0001866

19. Click the Add-ins menu in Excel.20. Click the Validate option.

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7			ORANGE JUICE, UNS	Inactive	GRADE A. USDA CERT	DAC Item Class	423805F	CASE	0001866	
8			ORANGE JUICE, UNS	Inactive	GRADE A. USDA CERT	DAC Item Class	423930F	CASE	0001866	
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1	Item Batch Name	Mass Change Interna	Batch : 2024-01-11 14	:14:19.19		Import Map	SMARTMAP 1069128	915	
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6	ок		ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERT	DAC Item Class	423740F	CASE	0001866
7	ок		ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERT	DAC Item Class	423805F	CASE	0001866
8	ок		ORANGE JUICE, UNSW	Inactive	GRADE A. USDA CERT	DAC Item Class	423930F	CASE	0001866
9	ок		ORANGE JUICE, UNSW	Inactive	GRADE A. USDA CERT	DAC Item Class	423931F	CASE	0001866
10	ок		ORANGE JUICE, UNSW	Inactive	GRADE A. USDA CERT	DAC Item Class	423980F	CASE	0001866
11	ок		ORANGE JUICE, UNSW	Inactive	GRADE A. USDA CERT	DAC Item Class	424110F	CASE	0001866
12	ок		ORANGE JUICE, UNSW	Inactive	GRADE A. USDA CERT	DAC Item Class	424140F	CASE	0001866
13	ок		ORANGE JUICE, UNSW	Inactive	GRADE A. USDA CERT	DAC Item Class	423010F	CASE	0001866
14	ок		ORANGE JUICE, UNSW	Inactive	GRADE A. USDA CERT	DAC Item Class	423011F	CASE	0001866
15	ок		ORANGE JUICE, UNSW	Inactive	GRADE A. USDA CERT	DAC Item Class	423060F	CASE	0001866
16	ок		ORANGE JUICE, UNSW	Inactive	GRADE A. USDA CERT	DAC Item Class	423070F	CASE	0001866
17	ок		ORANGE JUICE, UNSW	Inactive	GRADE A. USDA CERT	DAC Item Class	423080F	CASE	0001866
18	ок		ORANGE JUICE, UNSW	Inactive	GRADE A. USDA CERT	DAC Item Class	423085F	CASE	0001866
19	ок		ORANGE JUICE, UNSW	Inactive	GRADE A. USDA CERT	DAC Item Class	423095F	CASE	0001866
20	ок		ORANGE JUICE, UNSW	Inactive	GRADE A. USDA CERT	DAC Item Class	423100F	CASE	0001866
21	ок		ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERT	DAC Item Class	423305F	CASE	0001866
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23	ОК		ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERT	DAC Item Class	423400F	CASE	0001866

21. The Status in Column A will update to OK.

22. Click **Upload Data** under **Add-ins** in Excel.

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5	ОК			ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERTI	DAC Item Class	423730F	CASE	0001866	
6	ОК			ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERTI	DAC Item Class	423740F	CASE	0001866	

- 23. An **Upload Data** Window will appear.
- 24. Click "Generate Access Token".

Upload Data 23		×
Enter access token to upload of access token by clicking the Ge	data. You can gen enerate Access To	erate the ken button
Access Token		_
24		
Generate Access Token	Upload Data	Cancel



- 25. This will navigate you to NCFS Generate Access Token screen.
- 26. Click on "Generate and Copy Access Token" button.

	JR
Product Information Management Generate Access Token x	
Generate Access Token 25	
Generate the access token and enter it in the spreadsheet.	
Access Token Generate and Copy Access Token 26	
	Q

27. If successful, you will receive the following message:



- 28. Go back to the **Excel spreadsheet Upload Data Window** and click in the **Access Token** field and click **Ctrl+P** to paste the generated access token.
- 29. Click the Upload Data button.

Upload Data	\times
Enter access token to upload data. You can generate the access token by clicking the Generate Access Token button	
Access Token 9weTIXbL9MGMubNIYNuoV74A	
29	
Generate Access Token Upload Data Cancel	

- 30. Once the file is finished downloading, the **Upload Data** window will populate the below message, letting you know the file upload is complete.
- 31. Click the **Close** button.





- 32. Go to the NCFS Home screen and select Tools.
- 33. Click the **Scheduled Processes** app.

≡ NCFS							
<	Good afternoon, JER	APPS	RTS			33	
		Set Preferences	Alerts Composer	Worklist	Reports and Analytics	Scheduled Processes	

- 34. Enter Item Import in the Name field.
- 35. Enter your **Personnel Number (PERNR)** in the **Submitted** By field.
- 36. Check the **Submission Time**.
- 37. Click the **Search** button.

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Overview (?)								
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- 38. Click on the **Item Import** row.
- 39. Click on the **Attachment** and download the attachment if the process is in error to identify failed records.

Overview (2)									
✓ Search								Saved Search	ast hour 🗸
Name Item Import		Submissi	on Time After 🗸 1	11/24 1:38 PM	(UTC-05:00) New York	Eastern Time (ET)			
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Actions View Schedule New Process Resubmit Put On Hole	Cancel Process Releas	se Process View Lo	og 🖸						
Name	Metadata Name	Process ID	Status	Scheduled Time	Submission Time	Completion Time	Submitted By	Submission Notes	Start Time
Item Import Child	ItemImportProcessChildJob	3165502	Succeeded	1/11/24 2:34 PM EST	1/11/24 2:34 PM EST	1/11/24 2:34 PM EST	00815116	Item Import Process	1/11/24 2:34 PM EST
Item Import Preprocessing	ItemImportPreProcessingC	3165501	Succeeded	1/11/24 2:33 PM EST	1/11/24 2:33 PM EST	1/11/24 2:34 PM EST	00815116	PreProcessing Child J	1/11/24 2:33 PM EST
Import Items into Product Hub: Perform User Defined Process	ItemImportPreProcessingC	3165500	Succeeded	1/11/24 2:32 PM EST	1/11/24 2:32 PM EST	1/11/24 2:33 PM EST	00815116	Custom PreProcessin	1/11/24 2:32 PM EST
Item Import 38	ItemImportJobDef	3165499	Error	1/11/24 2:32 PM EST	1/11/24 2:32 PM EST	1/11/24 2:34 PM EST	00815116	ItemImportJobDef@I	1/11/24 2:32 PM EST
Process Details Status Details									َ <u>م</u>
Item Import, 3165499	4 3-22 DM EST								
Les and Output	4 2.32 FW L31								
Attachment ESS_L_3165499									

40. Error details will be displayed in the file. The error messages will inform you which warehouse(s) the item was not updated for due to pending inventory processing.

🚊 3165499 ×	+ - 0
File Edit View	
Item Batch Name Mass Change Interna Request Id for Item Search Keyword Request Id for Elastic Search Inges Import completed with error or warn	l Batch : 2024-01-11 14:14:19.19 lob submitted : 3165503 t Job submitted : 3165504 ing. Import errors or warnings are.
0001866(424360F) : Item : 0001866(424360F), MTL_TR, 0001866(423730F) : Item : 0001866(423730F), MTL_TR, 0001866(4210451) : Item : 0001866(4210451), MTL_TR,	WISACTIONS_ENABLED_FLAG - 0001866 (424360F) : You can't update the Transactable attribute because there are outbound shipment lines in a line status of not shipped or pending inventory processing. WISACTIONS_ENABLED_FLAG - 0001866 (423730F) : You can't update the Transactable attribute because there are outbound shipment lines in a line status of not shipped or pending inventory processing. WISACTIONS_ENABLED_FLAG - 0001866 (4210451) : You can't update the Transactable attribute because there are outbound shipment lines in a line status of not shipped or pending inventory processing.
Refer to these permissible interface	e table record limits.

Interface Table Name	Estimated Number of Records Present	Warning Limit	Error Limit
egp_categories_int	7958	5000000	6000000
egp_system_items_interface	122	5000000	6000000
egp_system_items_tl_intf	122	5000000	6000000



- 41. Navigate back to Product Information Management and Manage Items.
- 42. Select the Item Class for your Business Unit.
- 43. Enter the Item Number in the Item field.
- 44. Click the **Search** button to display the item information.

<u>~N</u>	CFS						
uct Inforr	nation Managemer	nt Manage Items ×	41				
lanag	ie Items 🧿	DAC Item Class	42				Done
⊿ Adv	anced Searc	h	42			Sav	Application Default V
	** Item Start	ts with 🗸 0001866	43 ** Keyword				
**	Description Start	ts with 🗸				44	
Sea	rch Results					Search	Reset Save Add Helds
tions •	view ▼ Form	at ▼ + × 厘	Compare 📴 Detach 🚚 Wrap 😩 Image Show 🗸 Manage Ite	em Mass Changes 🔻 👌			
	Image	Item	Description	Approval Status Item Status	Long Description Item	Class Organization	Primary Unit of Measure
۲	No Image Available	0001866	ORANGE JUICE, UNSWEETENED, 12/46 OZ CANSICASE	Approved Active	GRADE A. USDA CERTIFICATE O DAC	Item Class ITEMMASTERORG	CASE
Þ	No Image Available	0001866	ORANGE JUICE, UNSWEETENED, 12/46 OZ CANSICASE	Approved Active	GRADEA: USDA CERTIFICATE O DAC	Item Class 423730F	CASE

45. The below item attributes will update to "NO" when an item status is made inactive from active for Inventory Organizations.

Status Change Information X					
Attribute	Existing Value	New Value			
Stocked	Yes	No			
Purchased	Yes	No			
Purchasable	Yes	No			
Transaction Enabled	Yes	No			
Internally Transferable	Yes	No			
Transfer Orders Ena	Yes	No			
		ок			

IMPORTANT NOTE: THE INVENTORY ITEM STATUS SHOULD BE MADE AS INACTIVE IN ALL INVENTORY ORGANIZATIONS BEFORE MAKING THE ITEM INACTIVE IN THE MASTER ORGAINIZATIONS.



46. The last step, once all item Organizations are inactive, is to make the ITEMMASTERORG inactive. Update **Item Status** to "**Inactive**" and click **Save.**

Product Information Management Manage Items x Item: 0001866 (ITEMMASTERORG) x		
Edit Item: 0001866 (ITEMMASTERORG) Ø ±		R ₂ Social ▲ Actions ▼ Save ▼ Cencel
No items to display None 🛖	Item 0001866 * Description Des	46 Item Status Inactive v Lifecycle Phase Production User Item Type Purchased Item v Pack Type v Revision 0 Creation Date 9/24/23 7.34 PM
Overview Specifications Structures Attachments Associations Relationships Categories Quality Formatted Description	Long Description GRADE A USDA CERTIFICATE OF QUALITY AND CON MUST BE OF THE LATEST SEASON'S PACK EACH CO PLAINLY LABELED TO IDENTIFY CONTENTS.	NDITION REQUIRED. PRODUCT ONTAINER AND CASE MUST BE
✓ Unit of Measure ⑦ Primary Unit of Measure CASE Tracking Unit of Measure Primary	Defaulting Positive Deviation	g Control In Factor 0

47. The below item attributes will update to "NO" when an item status is made inactive from active for Master Organizations.

Status Change Information ×								
The following authorites were changed due to change in item status								
Attribute	Existing Value	New Value						
Stocked	Yes	No						
Enable Contract Co	Yes	No						
Recipe Enabled	Yes	No						
Purchased	Yes	No						
Purchasable	Yes	No						
Process Execution	Yes	No						
Transaction Enabled	Yes	No						
Invoice Enabled	Yes	No						
Invoiced	Yes	No						
Inventory Item	Yes	No						
Internally Transferable	Yes	No						
Transfer Orders Ena	Yes	No						
Hazardous Material	Yes	No						
Customer Ordered	Yes	No AT						
Customer Orders E	Yes	No 47						
		ок						



Wrap-Up/Important Notes

This QRG explains how to mass update inventory items status to Active or Inactive. By updating the item status for an inventory item, certain transactions can or cannot be performed with the item.

- 1. NCFS will allow an item to be made inactive even if there is an on-hand quantity existing. The only way to remove the on-hand quantity on an inactive item(s) is by reactivating the items at the Master Org level first and then at the Org level.
- 2. NCFS will not allow you to change an item status to inactive in Source Org's if there are any outbound shipment lines or open transfer order(s), but will allow to make it as inactive in Destination Org.
- 3. Inactivating of items at NI orgs will happen only when items are inactivated at item master level. If the agency decides to reactivate the item in Item Master Org and NI Org, user (item maintenance role) will be trained to change the inventory asset value to 'No' in NI Org.
- 4. User should check if there are any open transfer order supply in destination org before making item as inactive in destination org. (Review Item Demand and Supply screen can be used)
- 5. If user doesn't want to see inactive item in min-max planning report, planning method attribute needs to be updated manually to 'Not Planned' after item is made inactive. (This could be done through smart spreadsheet as well).
- 6. If user doesn't want to see inactive item in cycle counting, item attribute cycle count enabled attribute should be set to No. To achieve this, we have made cycle count enabled flag to be controlled at Organization level. The cycle count enabled flag should not be turned to "No" unless the on-hand quantity for item is zero in warehouse. If cycle count discrepancy is found for inactive item, then the item needs to be reactivated to process the adjustments.
- 7. Once an item is made inactive, it will not appear in Inventory Turns Report.

Reports Updated by Item Inactivation

Report	Inactive Items included in report
NC Cycle Count Variance Report (RPTIN003)	No
NC DAC Food Warehouses Issues & Returns Report (RPTIN018)	Yes
NC DAC Produce Distribution Warehouse Issues & Returns Report (RPTIN019)	Yes
NC Daily Average Cost Changes Report (RPTIN005)	Yes
NC Inventory On-hand Balance Dashboard (RPTIN013)	Yes
NC Inventory Negative On-hand Balance Dashboard (RPTIN013)	Yes
NC Shipment By Warehouse Report (RPTIN001)	No
NC Sub Inventory Item Movement Report (RPTIN010)	No
NC Warehouse Activity Register Report (RPTIN008)	No
NC Valued Transaction Register Report (RPTIN004)	No
NC Quantity Adjustment Details Report (RPTIN009)	Yes
NC Inventory Turns and All Items Valuation Report (RPTIN014)	No
NC Pre-Pick Item Avaialbility Report(RPTIN020)	User will not be able to change the item status to
NC Open Orders Report (RPTIN006)	inactive in source organization in case of any outbound
NC Quantity Backorder Report (RPTIN002)	shipment lines or open transfer order lines but will
INT-IN-001 Item Outbound Integration to Ariba	When Item Status is changed to inactive in Inventory
	Org, inactive item is send in delete mode to Ariba



Additional Resources

- INV109: Inventory Item Maintenance (vILT)
- INV-45: Inventory Item Inactivation (QRG)

