



INVENTORY ITEM STATUS MASS UPDATE

INV

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**).

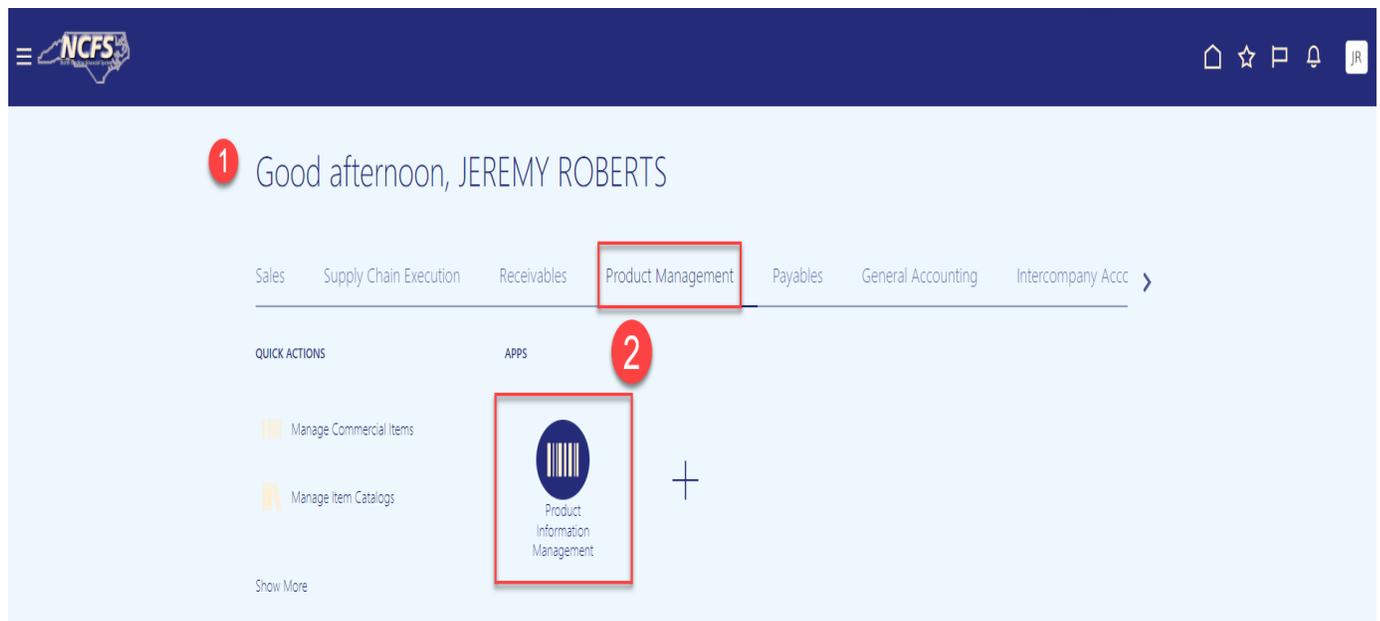
Introduction and Overview

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.



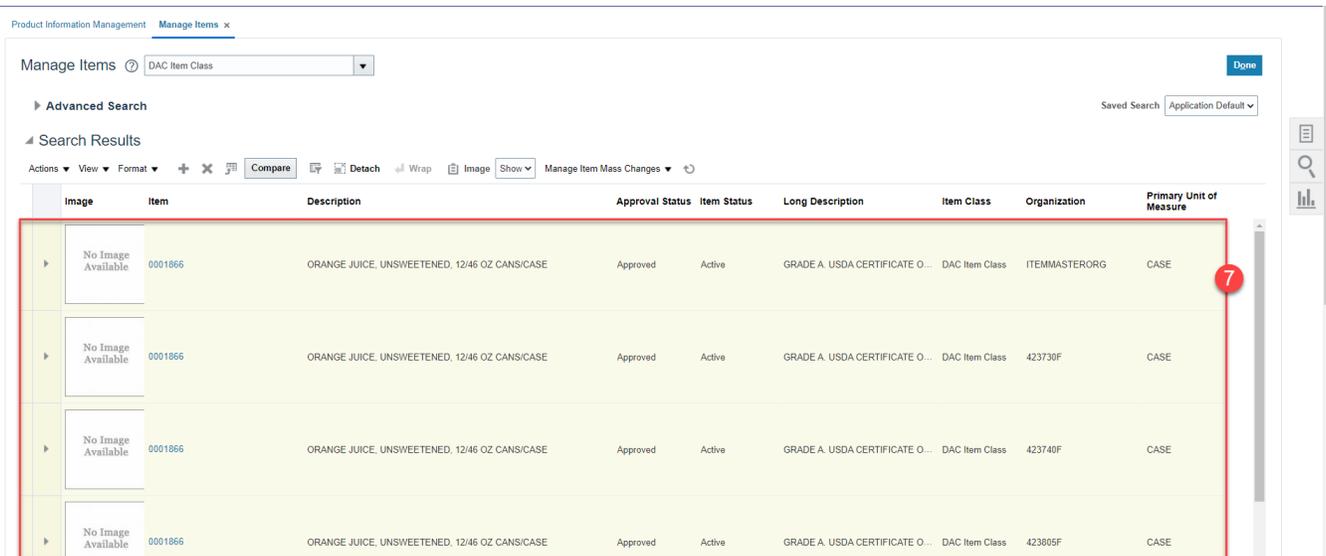
3. Under the **Tasks** Menu, click **Manage Items**.

The screenshot shows the 'Product Information Management' interface. On the right-hand side, there is a sidebar menu. The 'Item Management' section is expanded, and 'Manage Items' is highlighted with a red box and a red circle containing the number 3. The main area of the dashboard contains several widgets, all of which display 'No data available' with a lightning bolt icon. The widgets include: Supplier Products, Item Category Assignments, Publication Status, Item Completeness, Import Batches, Rules Impact Analysis, Items for Definition, and Items Pending Approval.

4. Select the **Item Class** for your **Business Unit**.
5. Enter **Item number** in the **Item** field.
6. Click the **Search** button.

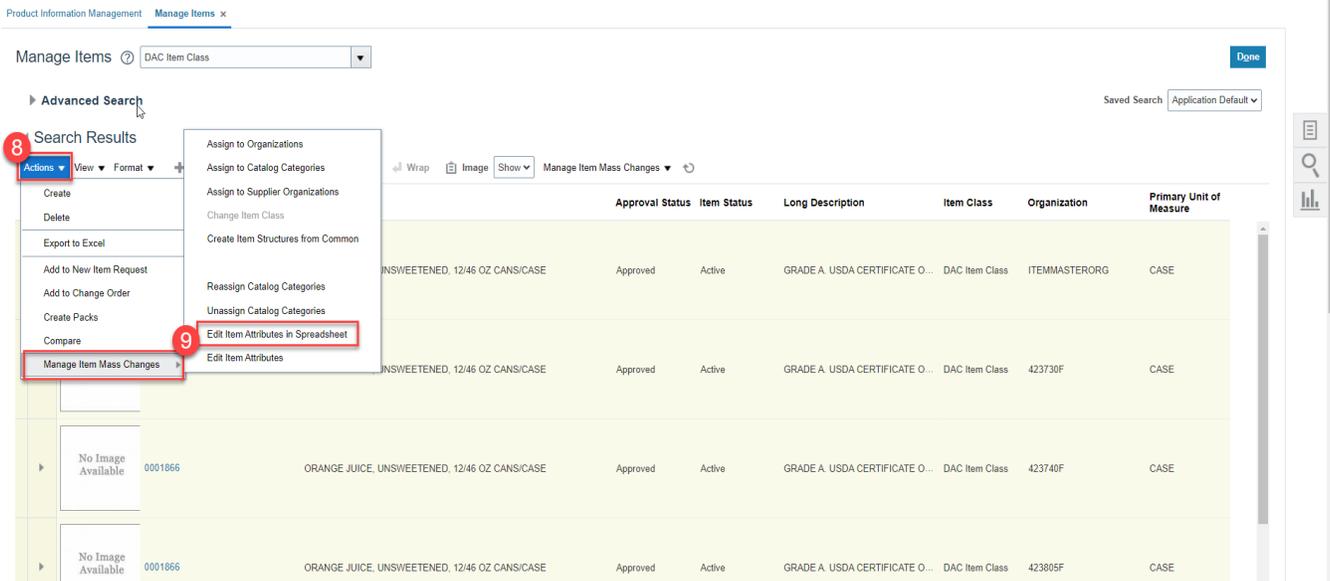
The screenshot shows the 'Manage Items' search interface. At the top, there is a dropdown menu for 'DAC Item Class' which is highlighted with a red box and a red circle containing the number 4. Below this is the 'Advanced Search' section. The search criteria field for 'Item Starts with' containing '0001866' is highlighted with a red box and a red circle containing the number 5. The 'Search' button is highlighted with a red box and a red circle containing the number 6. The interface also includes a 'Done' button, a 'Saved Search' dropdown, and a 'Search Results' section with various action buttons like 'Compare', 'Detach', 'Wrap', 'Image', and 'Show'.

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



8. Click on **Actions**.

9. Select **Manage Item Mass Changes** and then select **Edit Item Attributes in Spreadsheet**.



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 STEP).**



18. Update the status to “Inactive” or “Active” in column ‘D’ for each row desired for status updating.

	A	B	C	D	E	F	G	H	I
1	Item Batch Name	Mass Change Internal Batch : 2024-01-11 14:14:19.19				Import Map	SMARTMAP_1069128915		
2	Spoke System Name	Product Information Management Data Hub				Language	American English		
3									
4	Status	Upload Errors	Description	Item Status	Long Description	Item Class	Organization	Primary Unit of M	Item
5	OK		ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERT	DAC Item Class	423730F	CASE	0001866
6			ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERT	DAC Item Class	423740F	CASE	0001866
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
12			ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERT	DAC Item Class	424140F	CASE	0001866
13			ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERT	DAC Item Class	423010F	CASE	0001866
14			ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERT	DAC Item Class	423011F	CASE	0001866
15			ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERT	DAC Item Class	423060F	CASE	0001866
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.

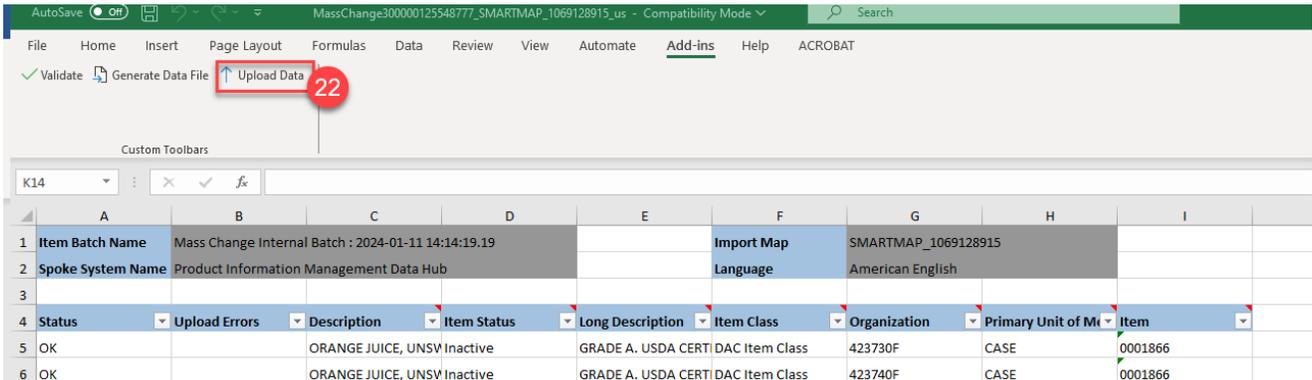
The screenshot shows the Microsoft Excel interface. The 'Add-ins' menu is highlighted with a red circle and the number 19. Below it, the 'Validate' option is also highlighted with a red circle and the number 20. The spreadsheet data is visible in the background, matching the table in the previous image.



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

Status	Upload Errors	Description	Item Status	Long Description	Item Class	Organization	Primary Unit of M	Item
OK		ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERTI	DAC Item Class	423730F	CASE	0001866
OK		ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERTI	DAC Item Class	423740F	CASE	0001866
OK		ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERTI	DAC Item Class	423805F	CASE	0001866
OK		ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERTI	DAC Item Class	423930F	CASE	0001866
OK		ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERTI	DAC Item Class	423931F	CASE	0001866
OK		ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERTI	DAC Item Class	423980F	CASE	0001866
OK		ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERTI	DAC Item Class	424110F	CASE	0001866
OK		ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERTI	DAC Item Class	424140F	CASE	0001866
OK		ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERTI	DAC Item Class	423010F	CASE	0001866
OK		ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERTI	DAC Item Class	423011F	CASE	0001866
OK		ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERTI	DAC Item Class	423060F	CASE	0001866
OK		ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERTI	DAC Item Class	423070F	CASE	0001866
OK		ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERTI	DAC Item Class	423080F	CASE	0001866
OK		ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERTI	DAC Item Class	423085F	CASE	0001866
OK		ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERTI	DAC Item Class	423095F	CASE	0001866
OK		ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERTI	DAC Item Class	423100F	CASE	0001866
OK		ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERTI	DAC Item Class	423305F	CASE	0001866
OK		ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERTI	DAC Item Class	423306F	CASE	0001866
OK		ORANGE JUICE, UNSV	Inactive	GRADE A. USDA CERTI	DAC Item Class	423400F	CASE	0001866

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

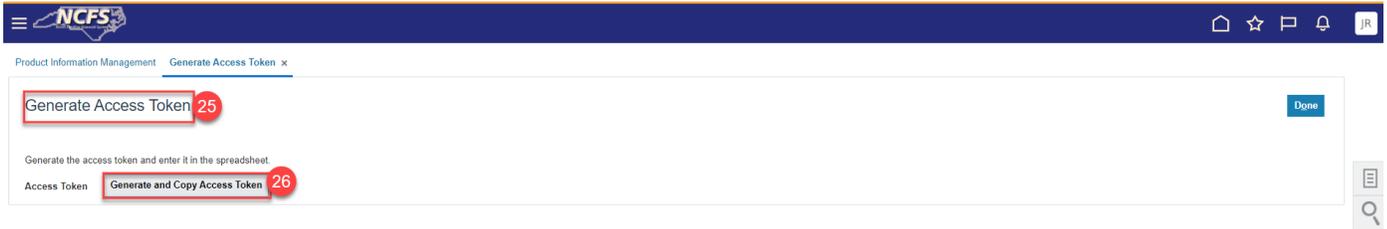


23. An **Upload Data** Window will appear.

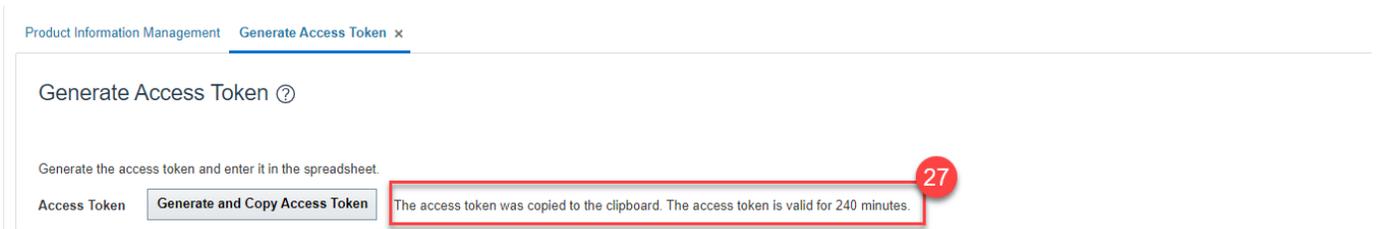
24. Click **“Generate Access Token”**.



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



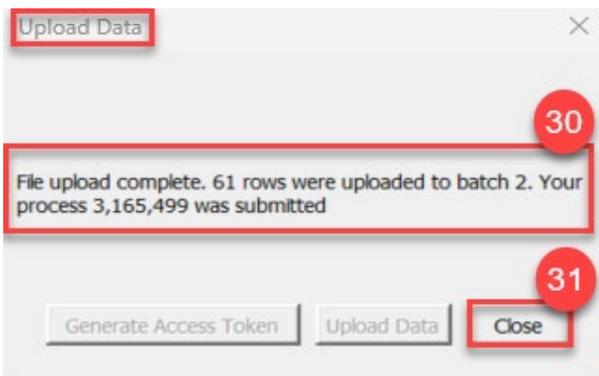
- 27. If successful, you will receive the following message:



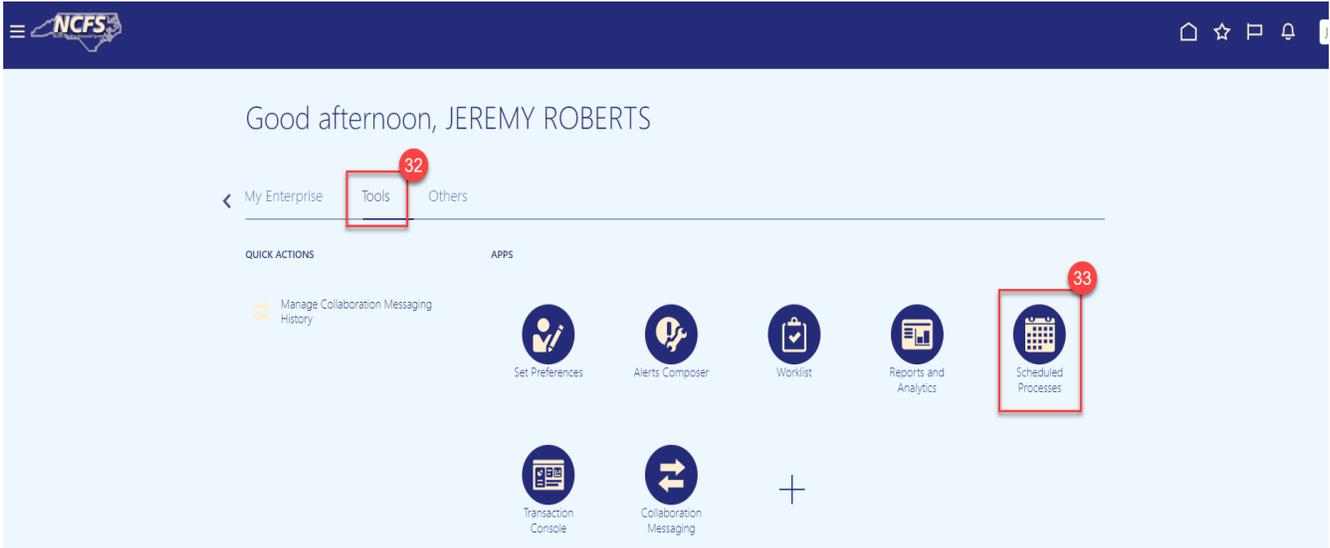
- 28. Go back to the **Excel spreadsheet Upload Data Window** and click in the **Access Token** field and click **Ctrl+P** to paste the generated access token.
- 29. Click the **Upload Data** button.



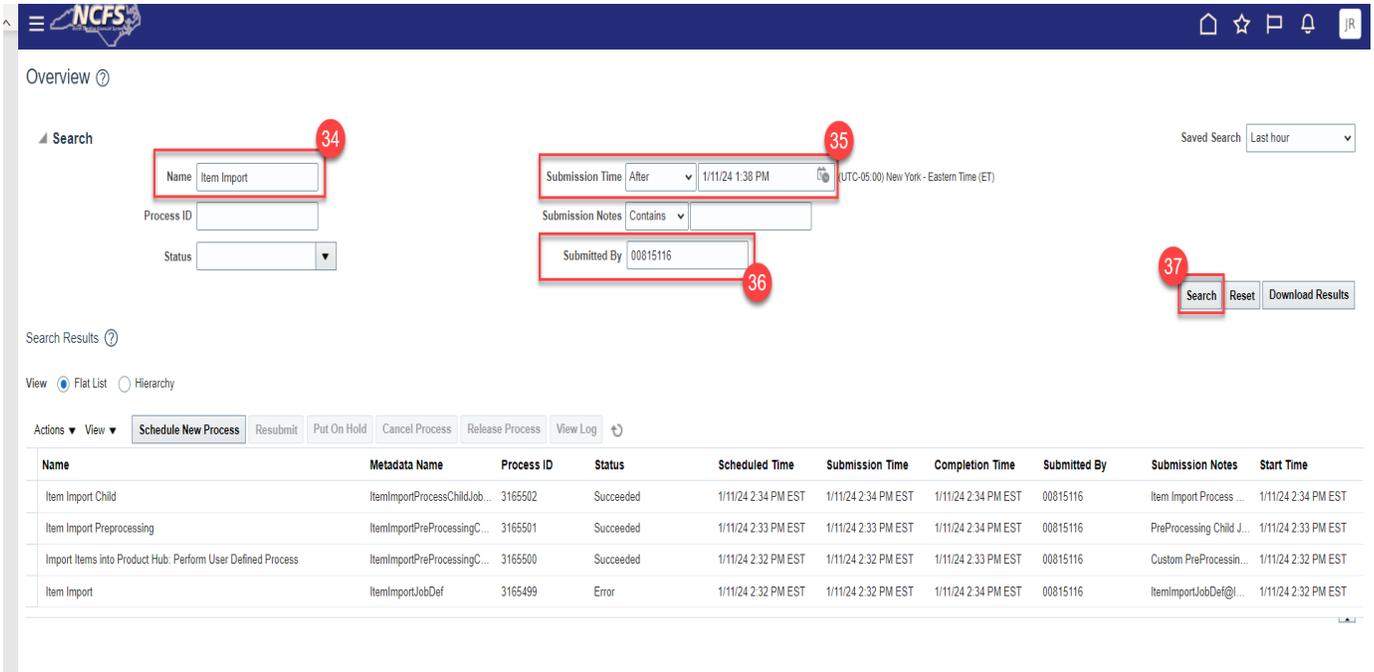
- 30. Once the file is finished downloading, the **Upload Data** window will populate the below message, letting you know the file upload is complete.
- 31. Click the **Close** button.



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



- 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.



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

Search

After 1/11/24 1:38 PM (UTC-05:00) New York - Eastern Time (ET)

Contains

00815116

Search Results

View Flat List Hierarchy

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](#)

Item Import, 3165499
 Status Error Schedule Start 1/11/24 2:32 PM EST

[Log and Output](#) 39

Attachment ESS_L_3165499

[Parameters](#)

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

File Edit View

Item Batch Name Mass Change Internal Batch : 2024-01-11 14:14:19.19
 Request Id for Item Search Keyword Job submitted : 3165503
 Request Id for Elastic Search Ingest Job submitted : 3165504
 Import completed with error or warning. Import errors or warnings are.

```

0001866(424360F) :
  Item : 0001866(424360F), MTL_TRANSACTIONS_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.
0001866(423730F) :
  Item : 0001866(423730F), MTL_TRANSACTIONS_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.
0001866(4210451) :
  Item : 0001866(4210451), MTL_TRANSACTIONS_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 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.

The screenshot shows the 'Manage Items' interface in the NCFSS system. The 'Advanced Search' section has the following filters: 'Item Starts with' set to '0001866' (highlighted with a red box and '43'), 'Item Class' set to 'DAC Item Class' (highlighted with a red box and '42'), and 'Description Starts with' is empty. The 'Search' button is highlighted with a red box and '44'. Below the search filters, the 'Search Results' table is displayed with columns: Image, Item, Description, Approval Status, Item Status, Long Description, Item Class, Organization, and Primary Unit of Measure. Three rows of results are shown for item 0001866, all with 'Approval Status' of 'Approved'. The 'Item Status' column shows 'Active', 'Active', and 'Inactive' (highlighted with a red box) for the three rows respectively.

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

The 'Status Change Information' dialog box shows a table of attributes that will be updated when the item status changes from active to inactive. The table has three columns: Attribute, Existing Value, and New Value.

Attribute	Existing Value	New Value
Stocked	Yes	No
Purchased	Yes	No
Purchasable	Yes	No
Transaction Enabled	Yes	No
Internally Transferable	Yes	No
Transfer Orders Enabled	Yes	No

An 'OK' button is located at the bottom right of the dialog box.

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

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) ?

Item 0001866

* Description ORANGE JUICE, UNSWEETENED, 12/46 OZ CANS/CASE

Item Class DAC Item Class

Approval Status Approved

Completeness Score None

Created By Conversion_User

Item Status Inactive

Lifecycle Phase Production

User Item Type Purchased Item

Pack Type

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 CONDITION REQUIRED. PRODUCT MUST BE OF THE LATEST SEASON'S PACK. EACH CONTAINER AND CASE MUST BE PLAINLY LABELED TO IDENTIFY CONTENTS.

Unit of Measure

Primary Unit of Measure CASE

Tracking Unit of Measure Primary

Defaulting Control

Positive Deviation 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 x

The following attributes 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
Customer Orders E...	Yes	No

OK

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 Availability Report (RPTIN020)	User will not be able to change the item status to inactive in source organization in case of any outbound shipment lines or open transfer order lines but will
NC Open Orders Report (RPTIN006)	
NC Quantity Backorder Report (RPTIN002)	
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)