INV-09 Add Attachments to Approved Items

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation of how to Add Attachments to Approved Items in the North Carolina Financial System (**NCFS**).

Introduction and Overview

This QRG covers how to Add Attachments to Approved Items in NCFS.

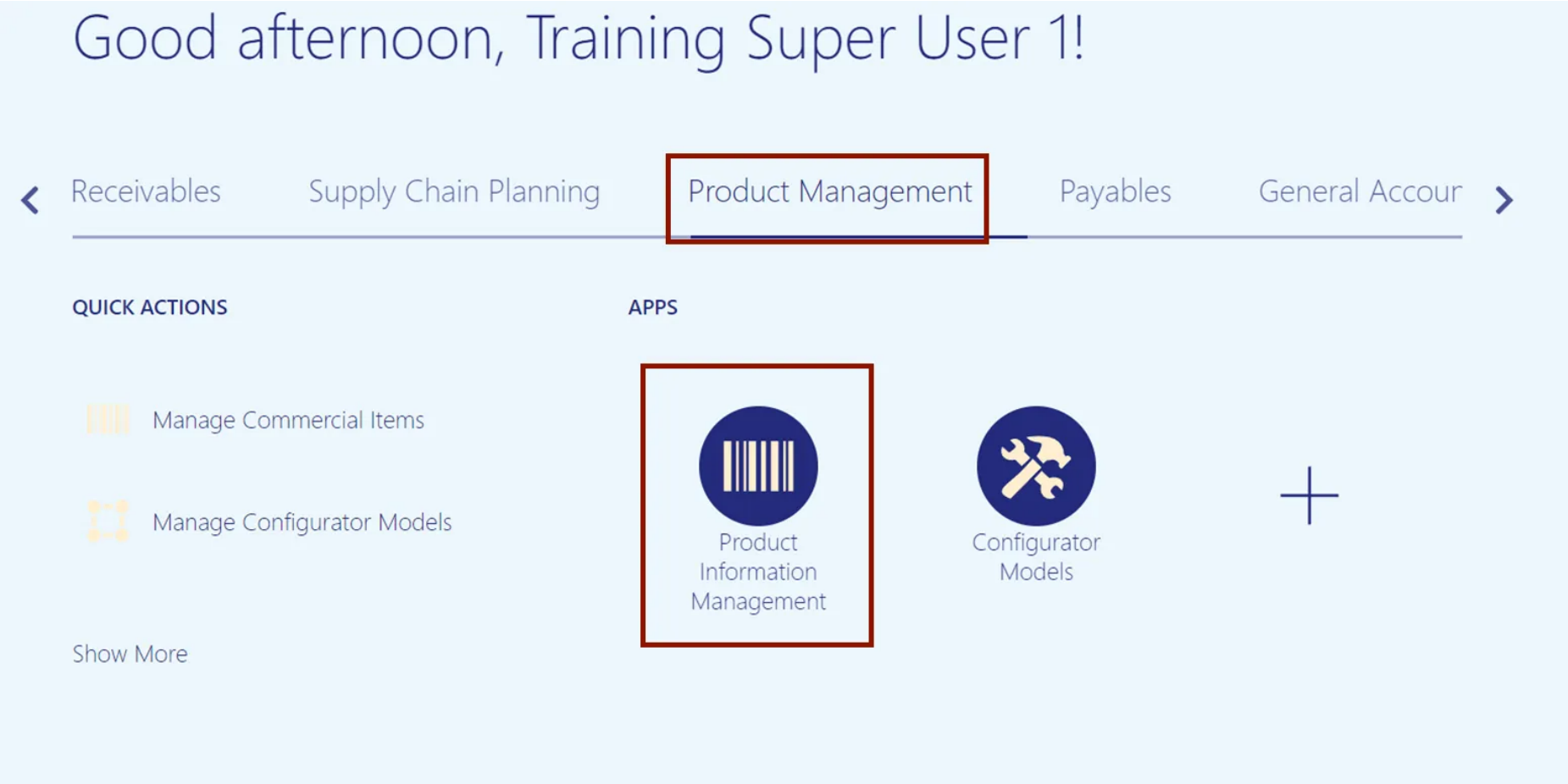
Add Attachments to Approved Items

To Add Attachments to Approved Items in NCFS, please follow the steps below. There are 11 steps to complete this process.

Step 1. Log in to the NCFS portal with your credentials to access the system.

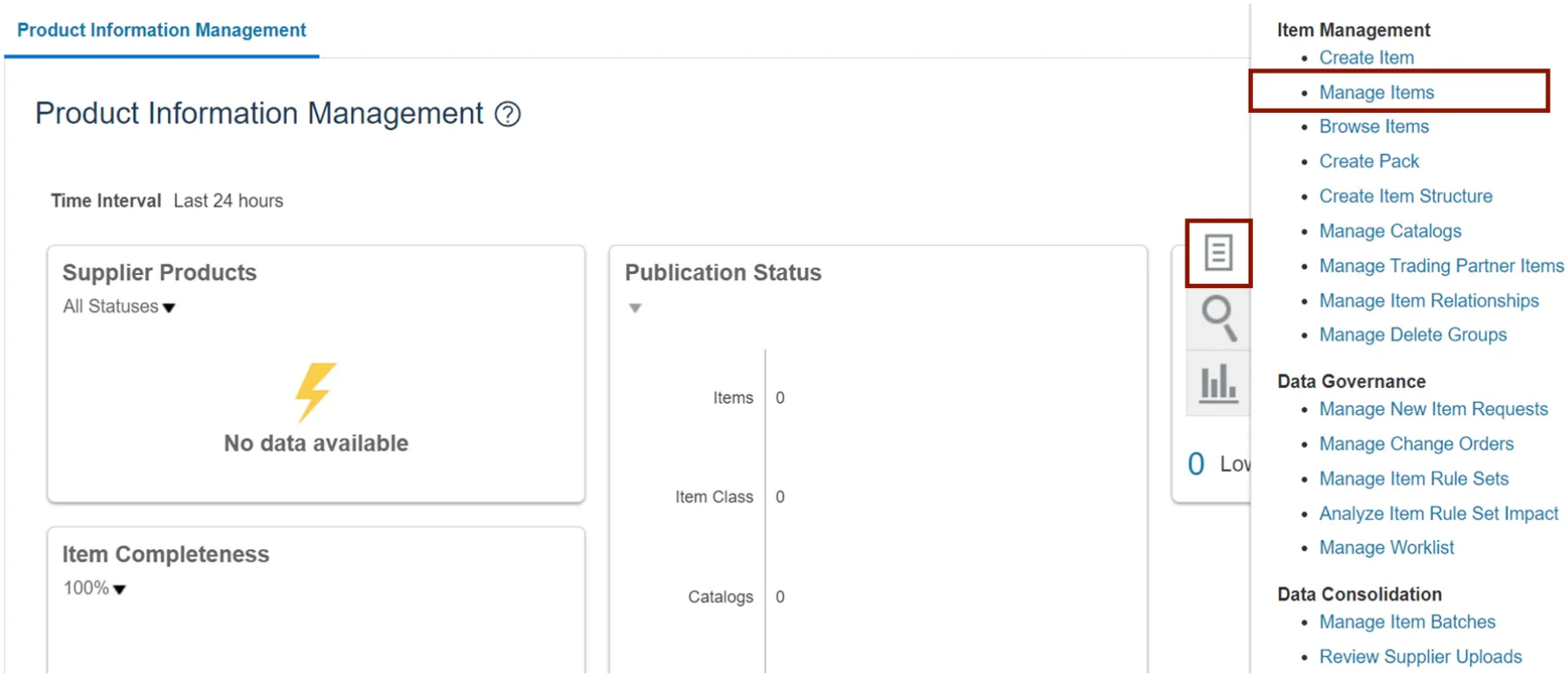
Step 2. On the **Home** page, click on the **Product Management** tab and click **Product Information Management** app.

Image



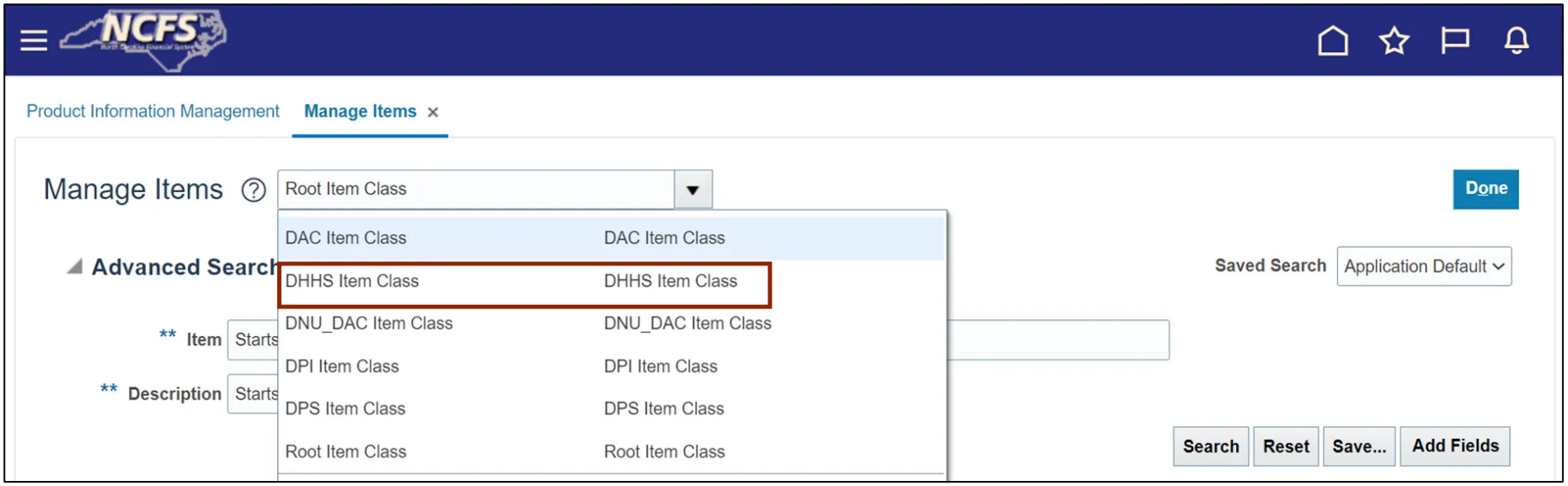
Step 3. On the **Product Information Management** page, click on **Tasks** icon and click **Manage Items**.

Image



Step 4. Select the required **Root Item Class**. In this example, we choose **DHSS Item Class**.

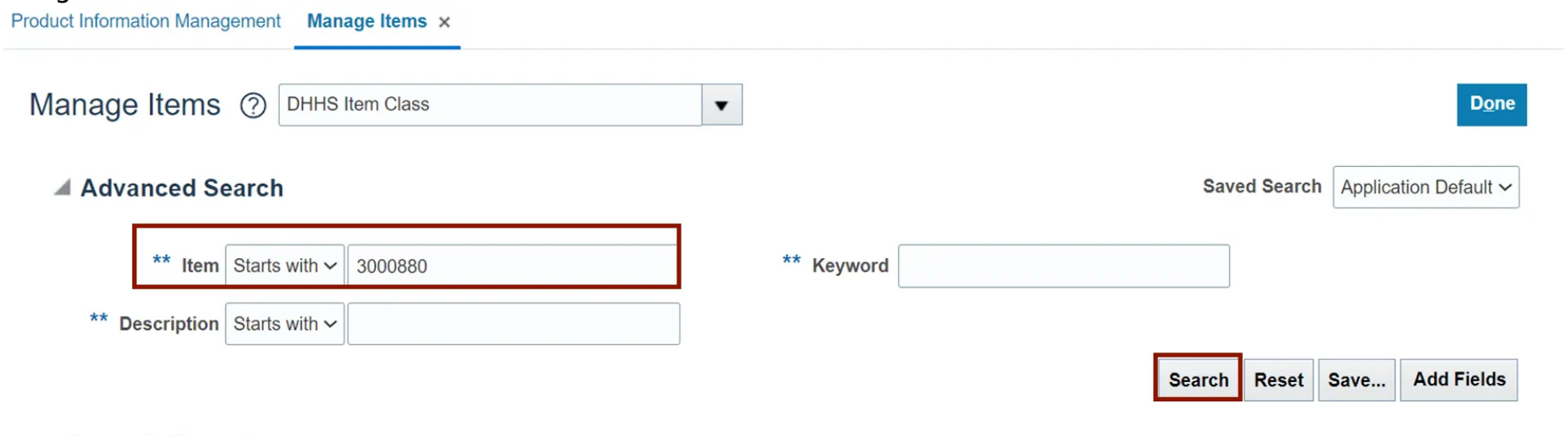
Image



Step 5. On the **Advanced Search** section, enter the **Item** number and click the **Search** button.

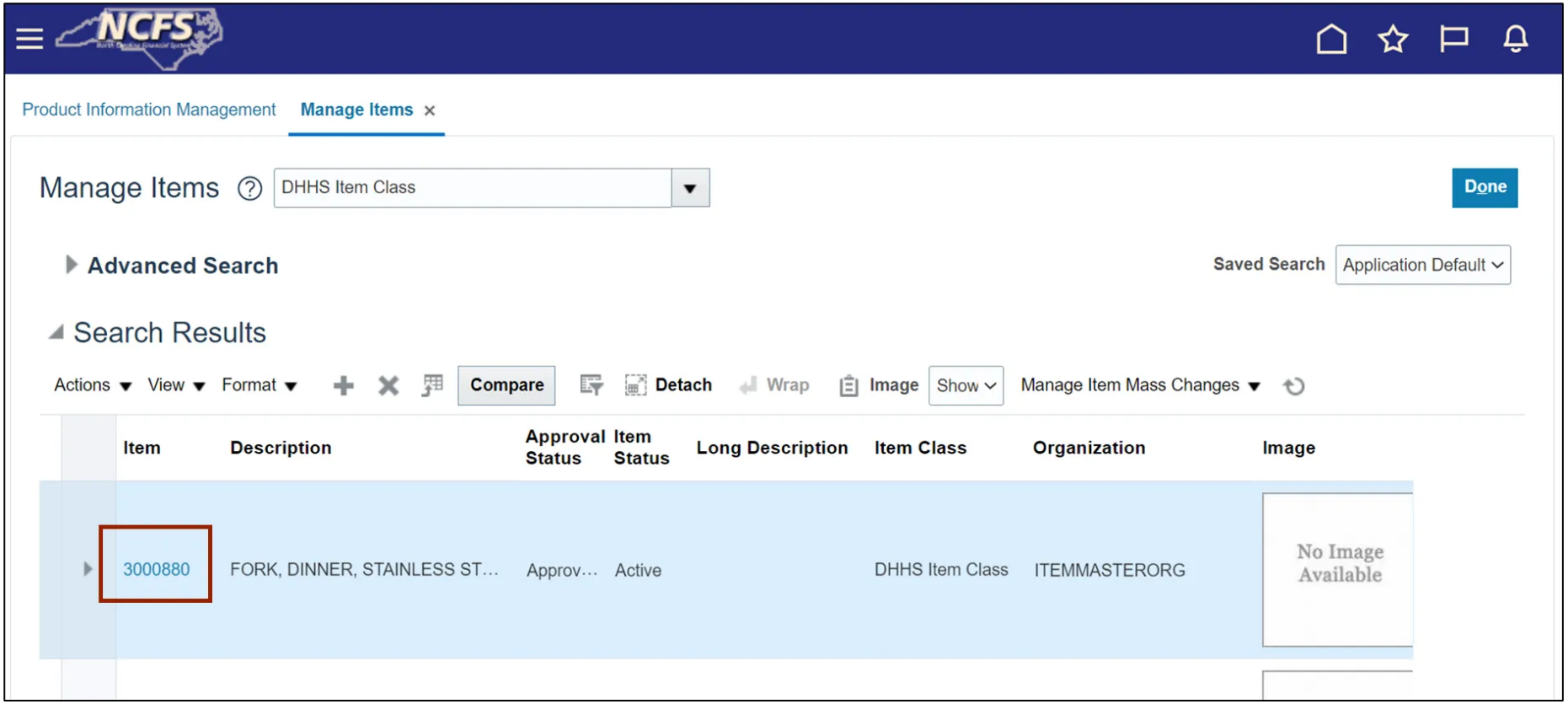
In this example, we choose **3000880**.

Image



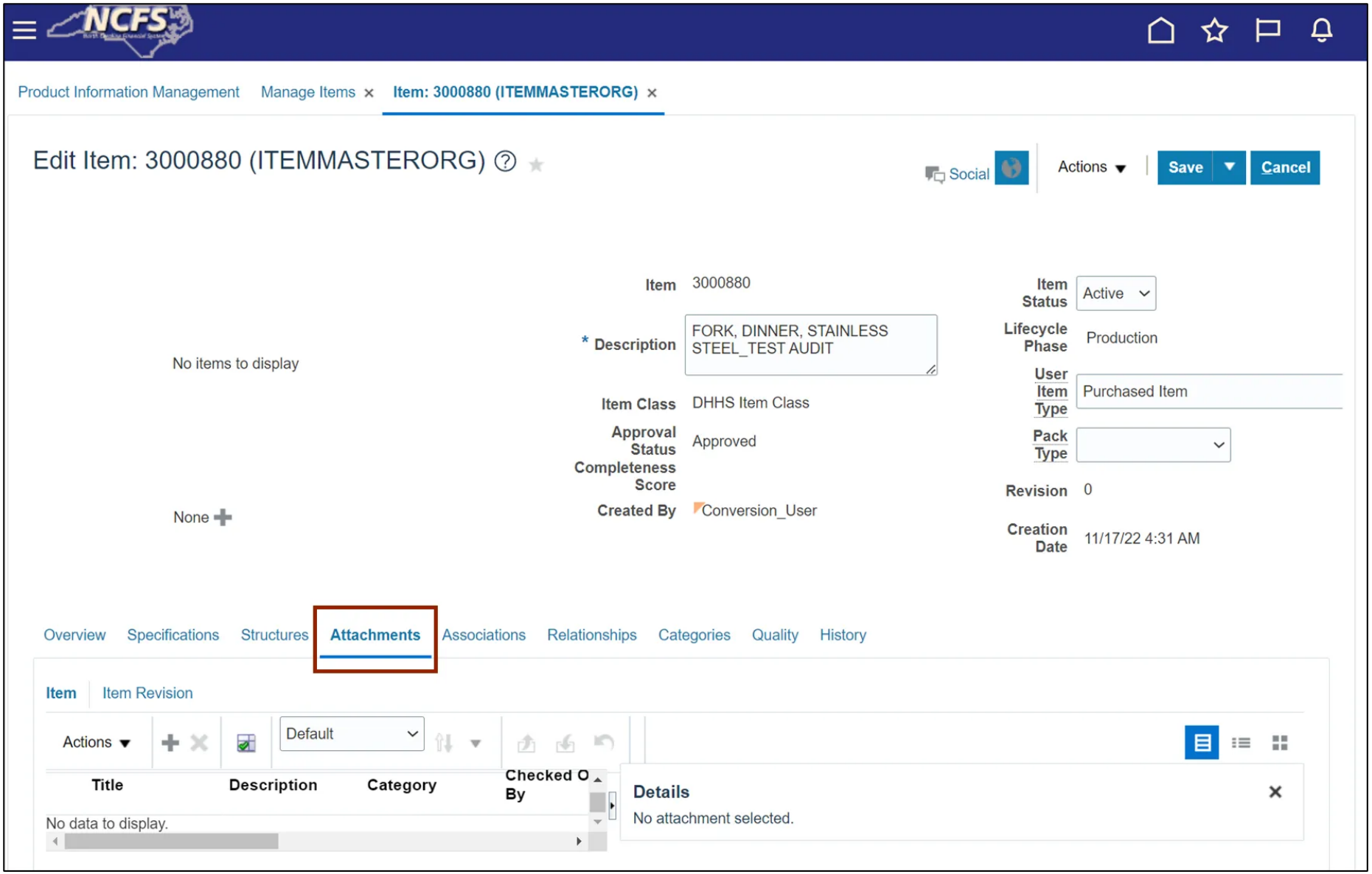
Step 6. Click the **Item Number** link in the **Item** column with **Organization** field as **ITEMMASTERORG**.

Image



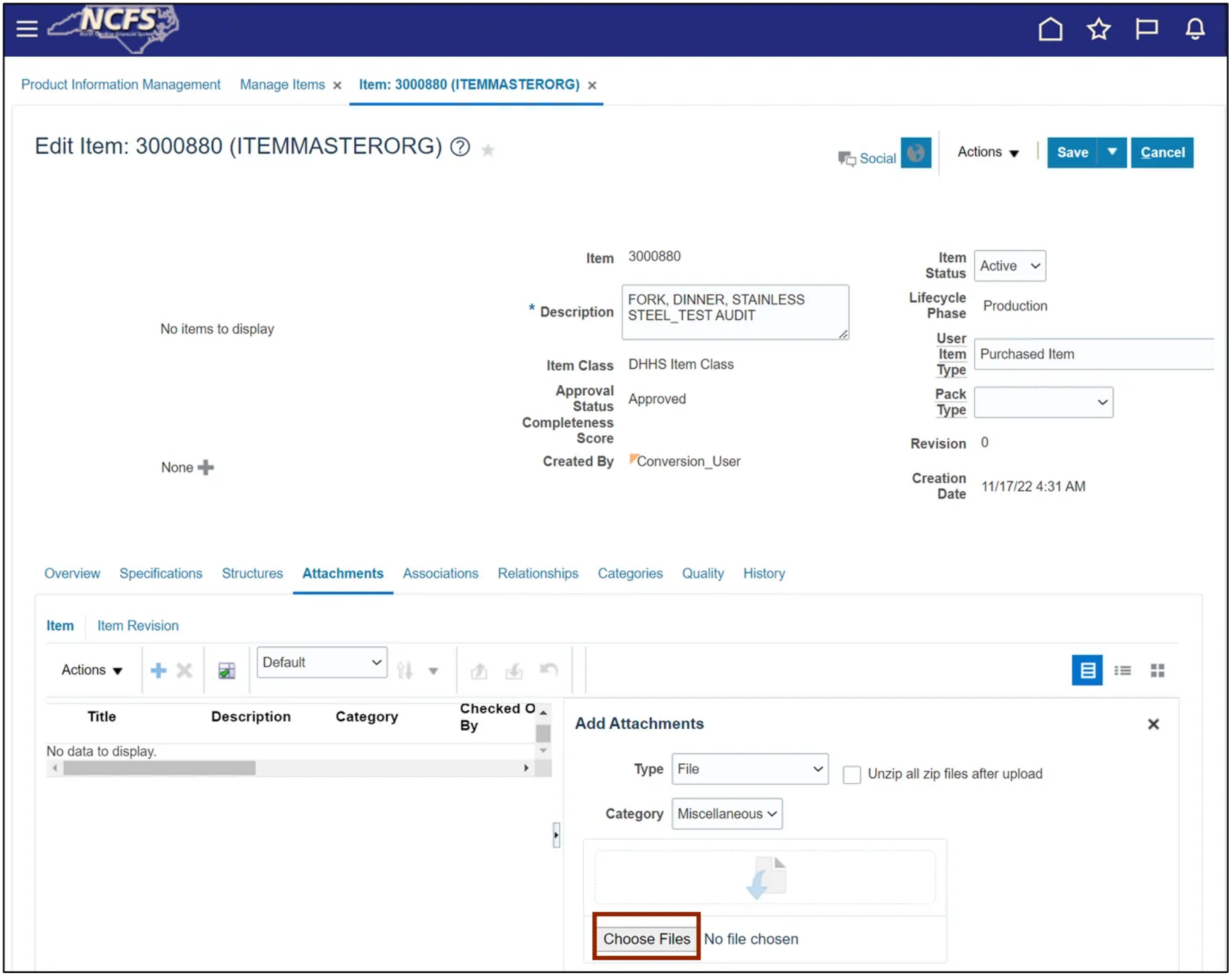
Step 7. On the **Edit Item** page, navigate to **Attachments** tab.

Image



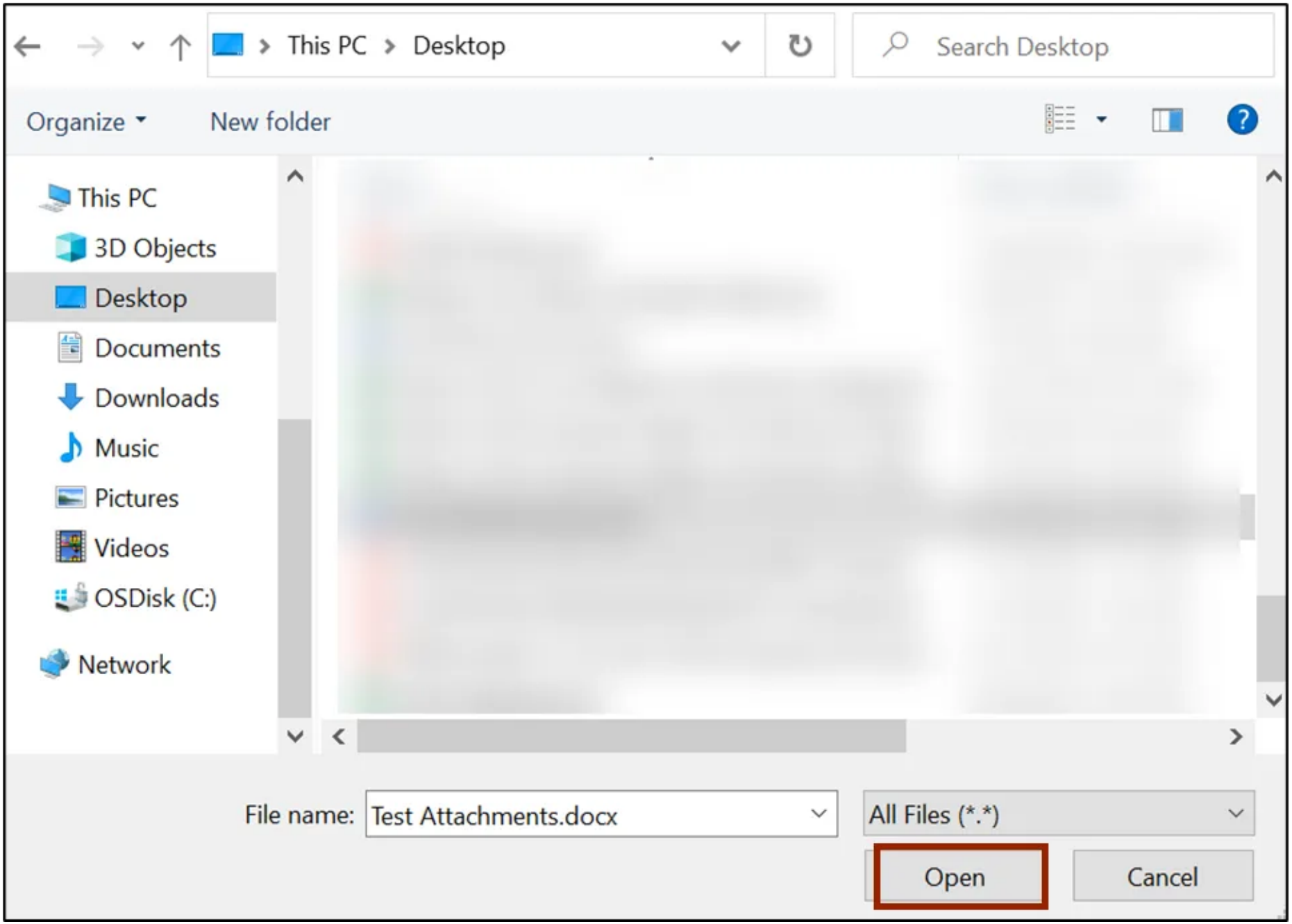
Step 8. Click the **Add** icon and click the **Choose Files** option in the **Add Attachments** area.

Image


NCFS
Product Information Management
Manage Items
Item: 3000880 (ITEMMASTERORG)
Edit Item: 3000880 (ITEMMASTERORG)
Social
Actions
Save
Cancel
No items to display
None
Item
3000880
* Description
FORK, DINNER, STAINLESS STEEL_TEST AUDIT
Item Class
DHHS Item Class
Approval Status
Approved
Completeness Score
Created By
Conversion_User
Item Status
Active
Lifecycle Phase
Production
User Item Type
Purchased Item
Pack Type
Revision
0
Creation Date
11/17/22 4:31 AM
Overview
Specifications
Structures
Attachments
Associations
Relationships
Categories
Quality
History
Item
Item Revision
Actions
Default
Title
Description
Category
Checked O By
No data to display.
Add Attachments
Type
File
Unzip all zip files after upload
Category
Miscellaneous
Choose Files
No file chosen

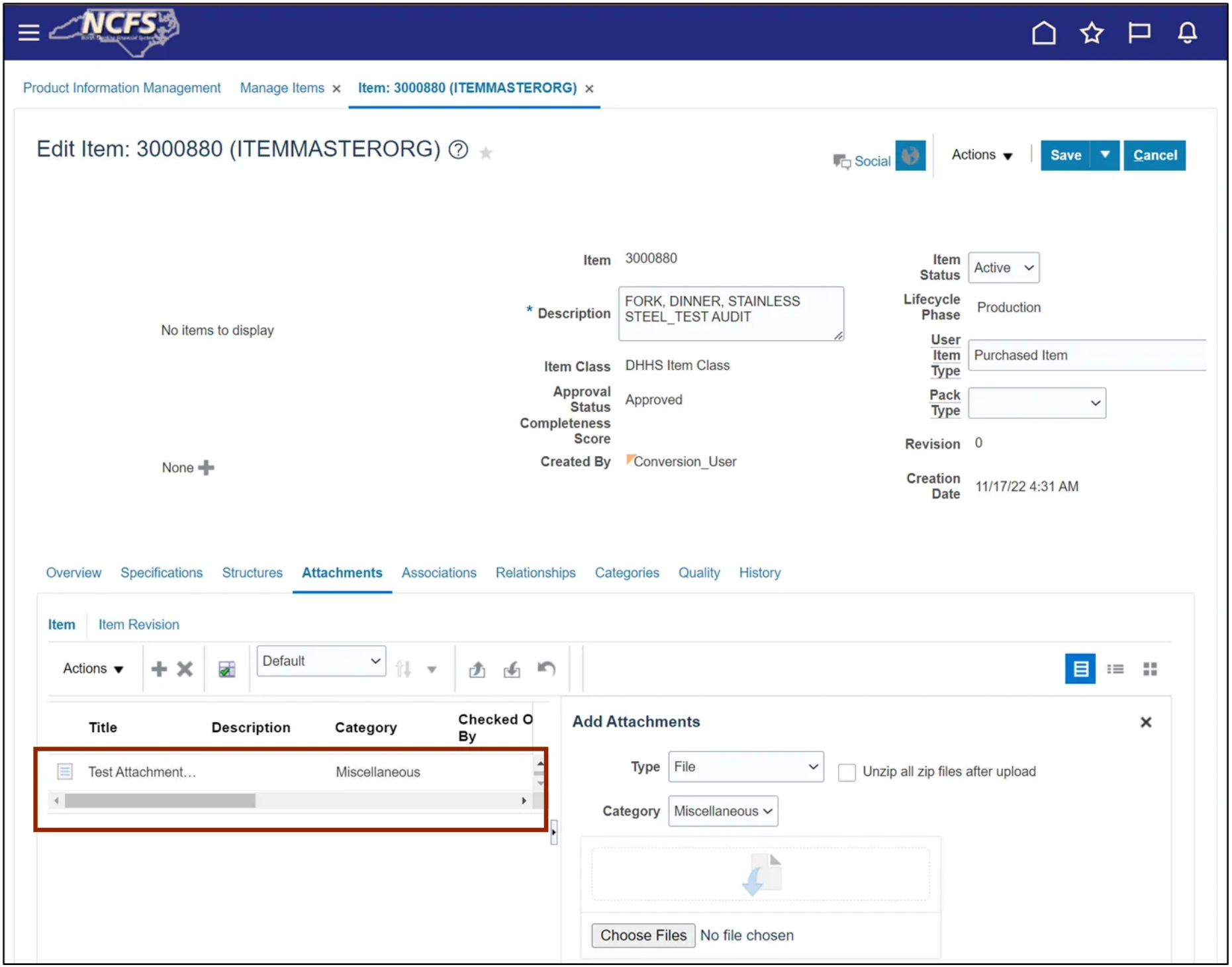
Step 9. Select one or multiple files from the local desktop or folder and click the **Open** button.

Image


This PC
Desktop
Search Desktop
Organize
New folder
This PC
3D Objects
Desktop
Documents
Downloads
Music
Pictures
Videos
OSDisk (C:)
Network
File name:
Test Attachments.docx
All Files (*.*)
Open
Cancel

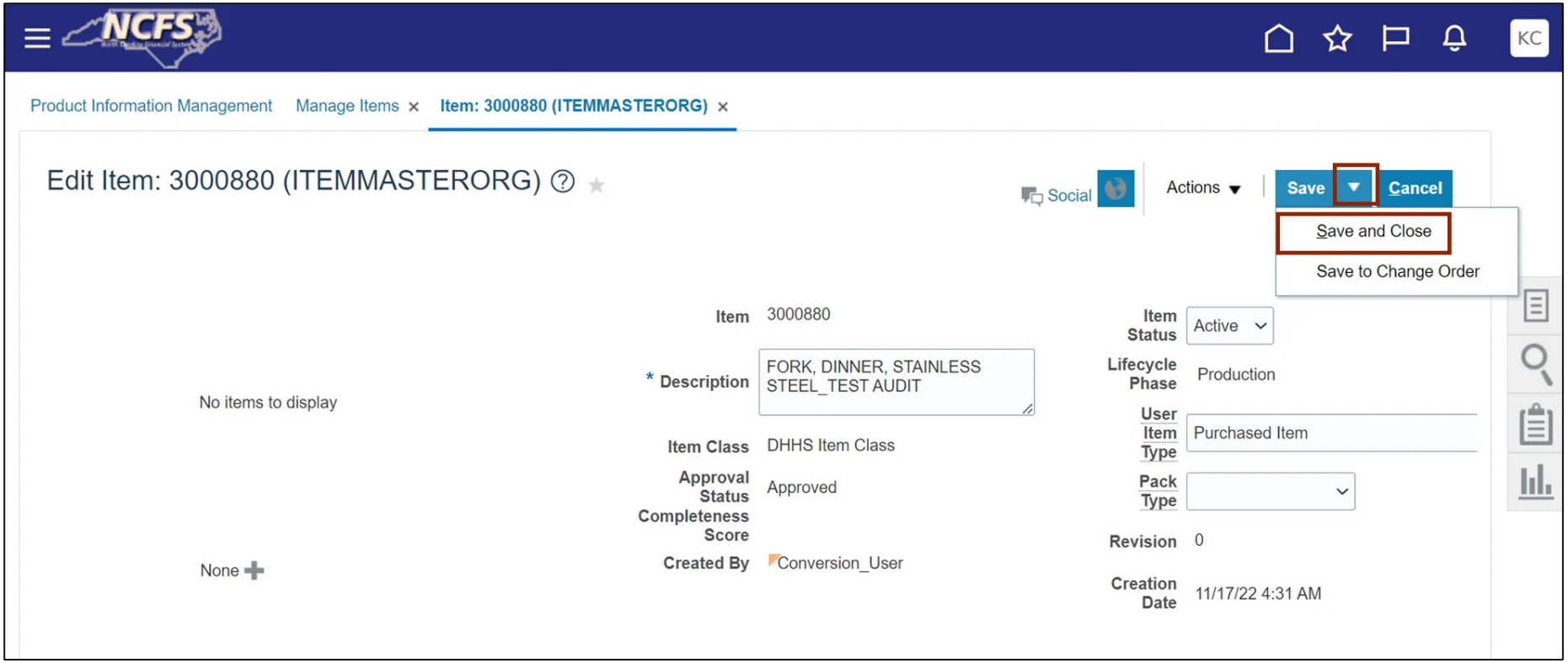
Step 10. Review the uploaded files.

Image


NCFS
Product Information Management
Manage Items
Item: 3000880 (ITEMMASTERORG)
Edit Item: 3000880 (ITEMMASTERORG)
Social
Actions
Save
Cancel
No items to display
None
Item 3000880
* Description FORK, DINNER, STAINLESS STEEL_TEST AUDIT
Item Class DHHS Item Class
Approval Status Approved
Completeness Score
Created By Conversion_User
Item Status Active
Lifecycle Phase Production
User Item Type Purchased Item
Pack Type
Revision 0
Creation Date 11/17/22 4:31 AM
Overview
Specifications
Structures
Attachments
Associations
Relationships
Categories
Quality
History
Item
Item Revision
Actions
Default
Title
Description
Category
Checked O By
Test Attachment…
Miscellaneous
Add Attachments
Type File
Unzip all zip files after upload
Category Miscellaneous
Choose Files
No file chosen

Step 11. Click the *Save* drop-down choice list and select **Save and Close**.

Image



Wrap-Up

Add Attachments to Approved Items using the steps above.

Additional Resources

- Virtual Instructor-Led Training (vILT)
  - INV101: Inventory Agency Manager

- INV105: Warehouse Management
- INV109: Inventory Item Maintenance

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