INV-28 Approve Cycle Counts

Purpose

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

Introduction and Overview

This QRG covers the generation of approving cycle counts.

User Tip

The following are prerequisites required to approving cycle counts:

1. The approver must review the NC Cycle Count variance report and compare the quantities before choosing an action.

2. A cycle count must be ready for approval. This is communicated outside of NCFS.

Approve Cycle Counts

To approve cycle counts in NCFS, please follow the steps below. There are 10 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, under the **Supply Chain Execution** tab, click the **Inventory Management** app.

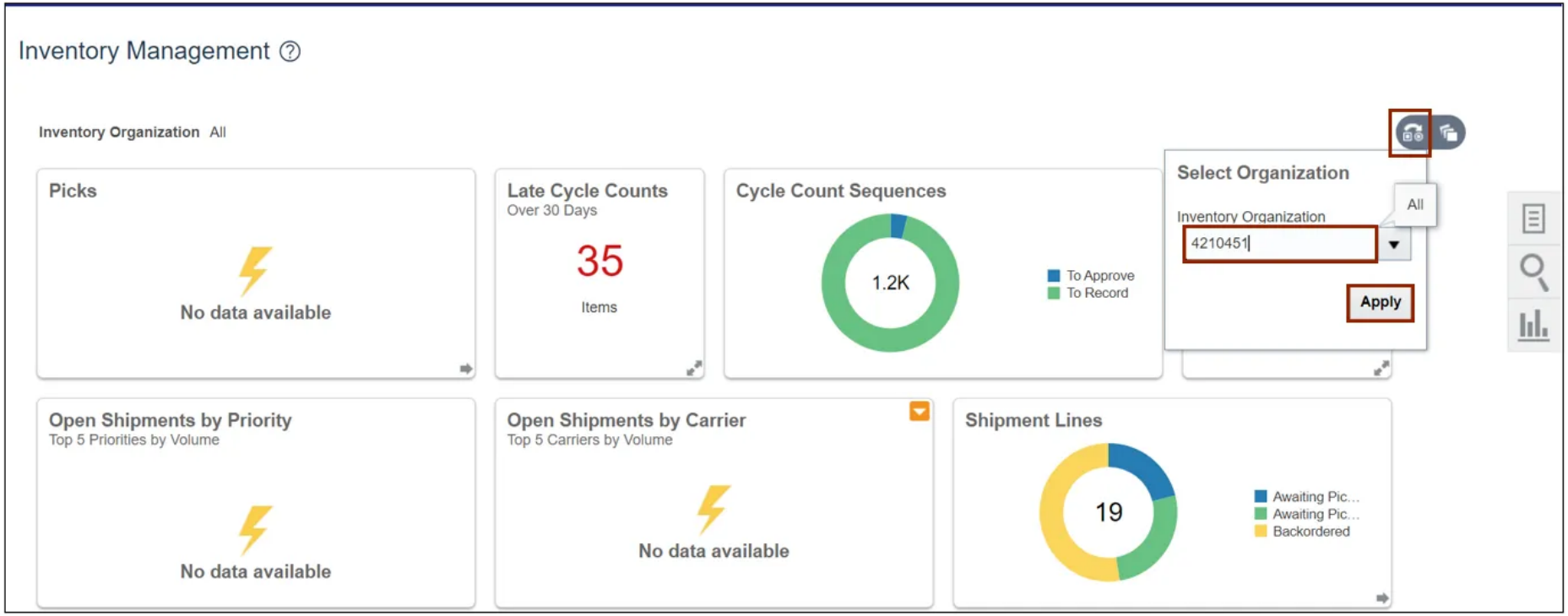
Image



Step 3. Click the **View By** icon and enter in the **Inventory Organization** number in the *Select Organization* pop-up box.

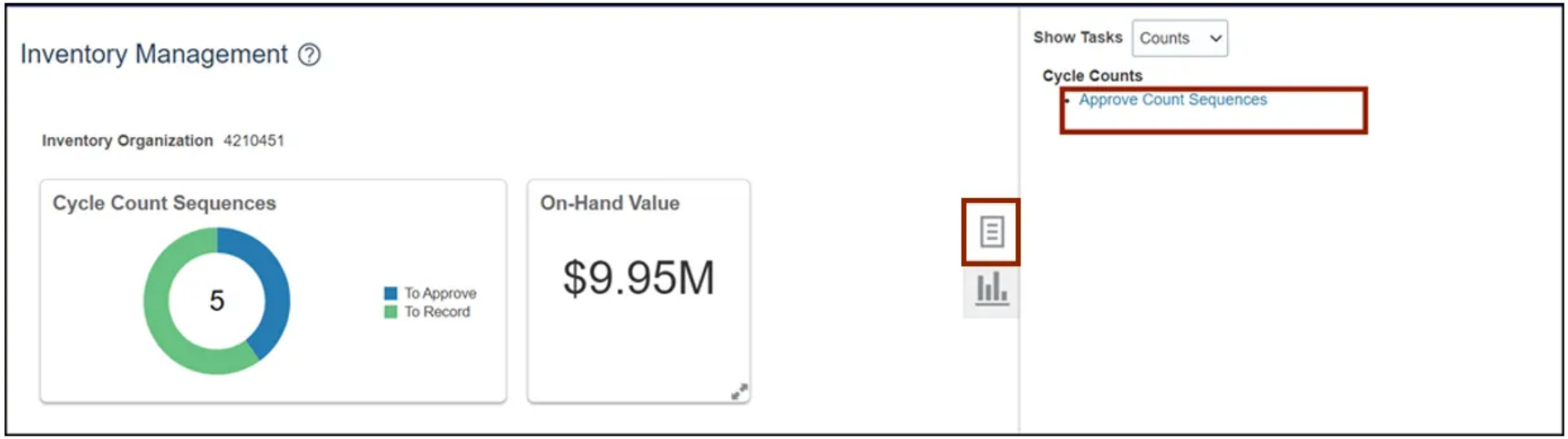
In this example, we chose **4210451**. Click the **Apply** button.

Image



Step 4. Click the **Tasks** icon. Under the **Cycle Counts** section, select the **Approve Count Sequences** link.

Image



Step 5. Select the appropriate **Name** from the *Count Name* drop-down choice list.

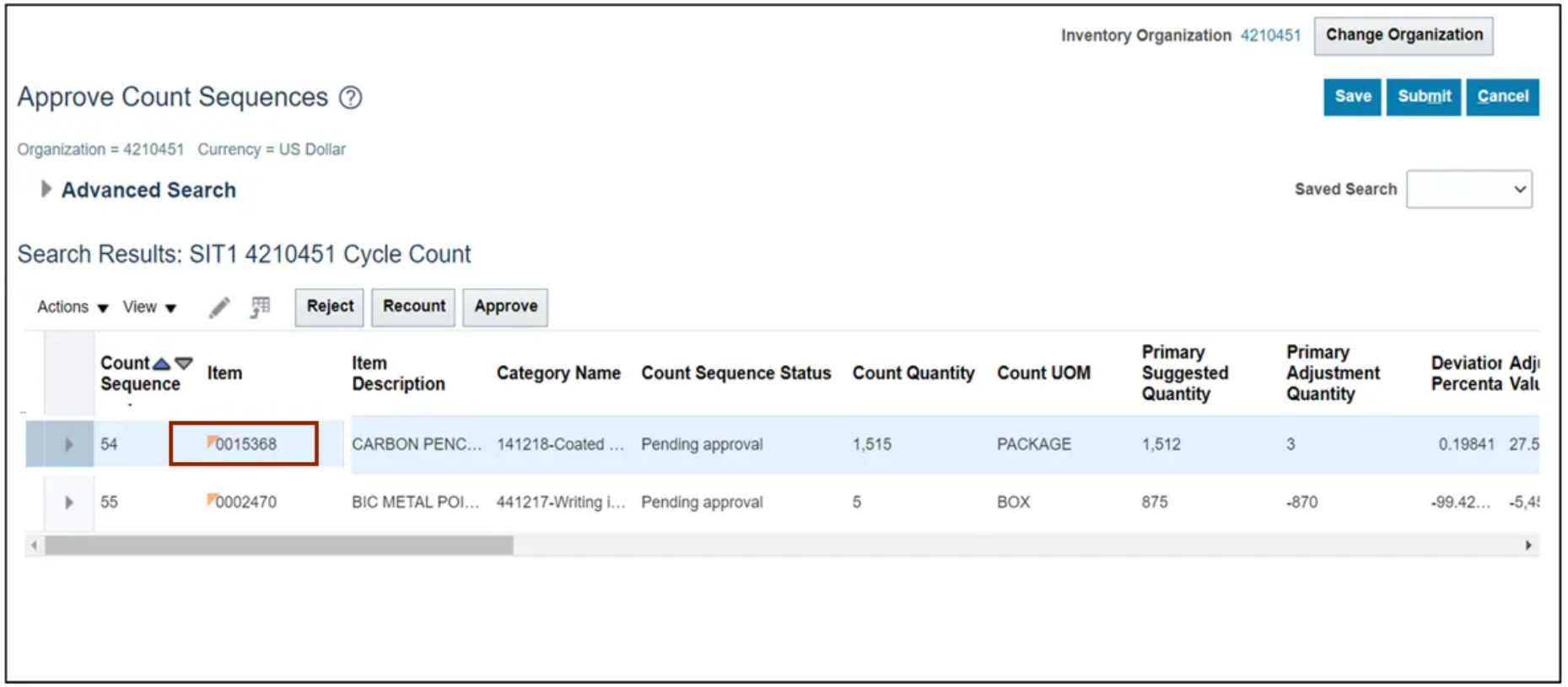
In this example we chose **SIT1 4210451 Cycle Count** and the **Pending Approval** option from the *Approval Status* drop-down. Click the **Search** button.

Image



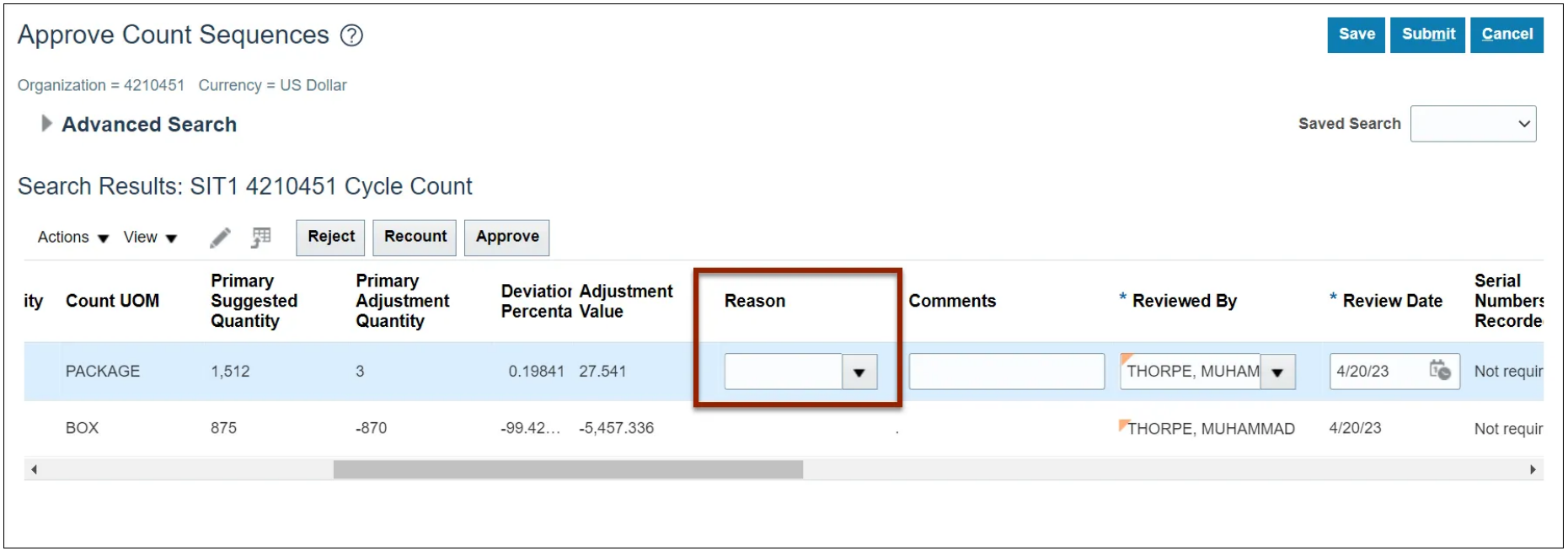
Step 6. Select the **Count Sequence** that you want to view. Scroll to the right for more information and options.

Image



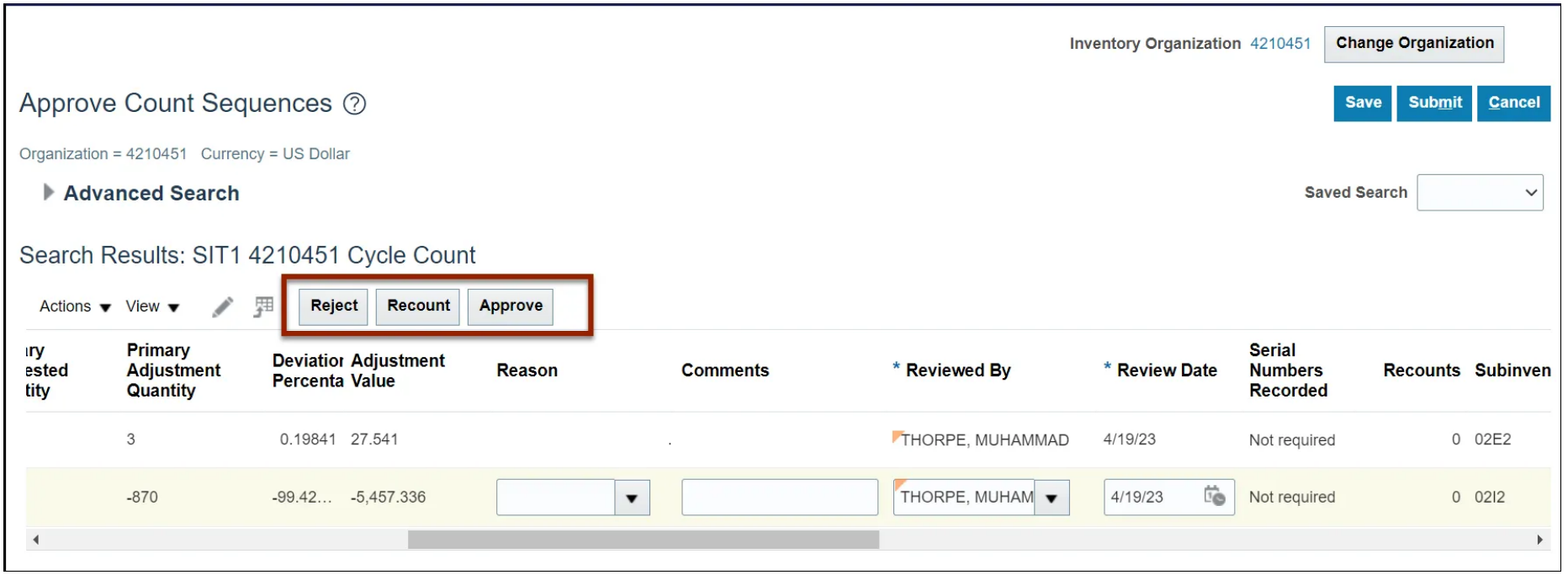
Step 7. Select a **Reason** from the drop-down list.

Image



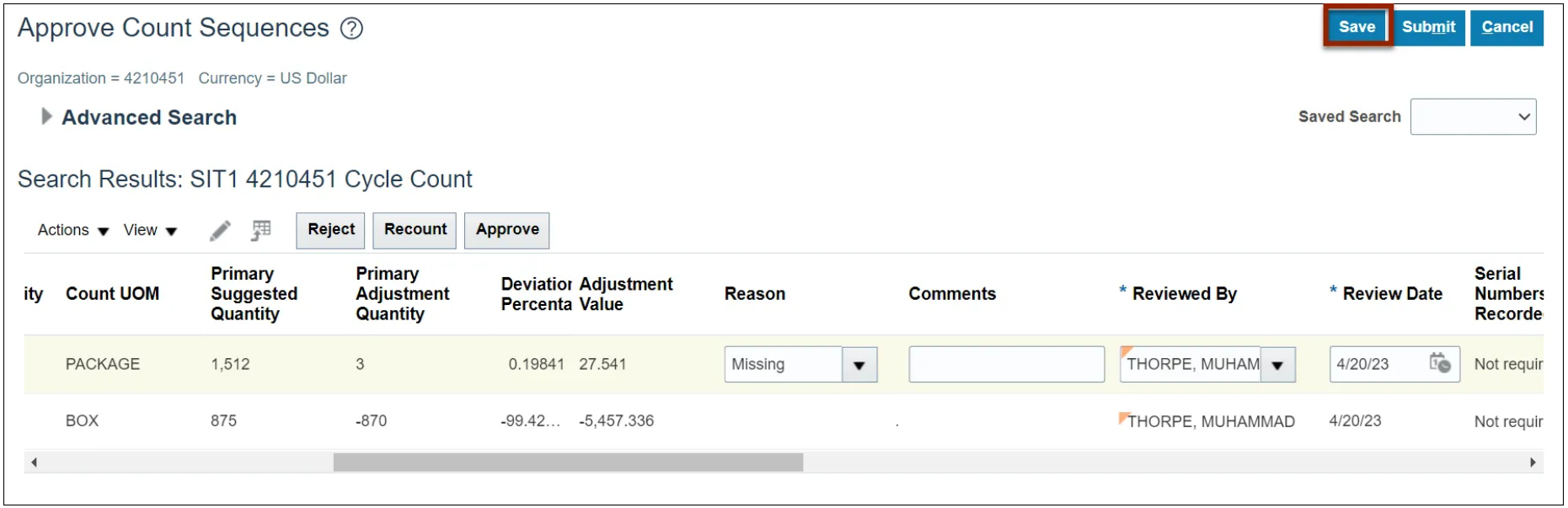
Step 8. Click the **Approve** or **Reject** or **Recount** button.

Image



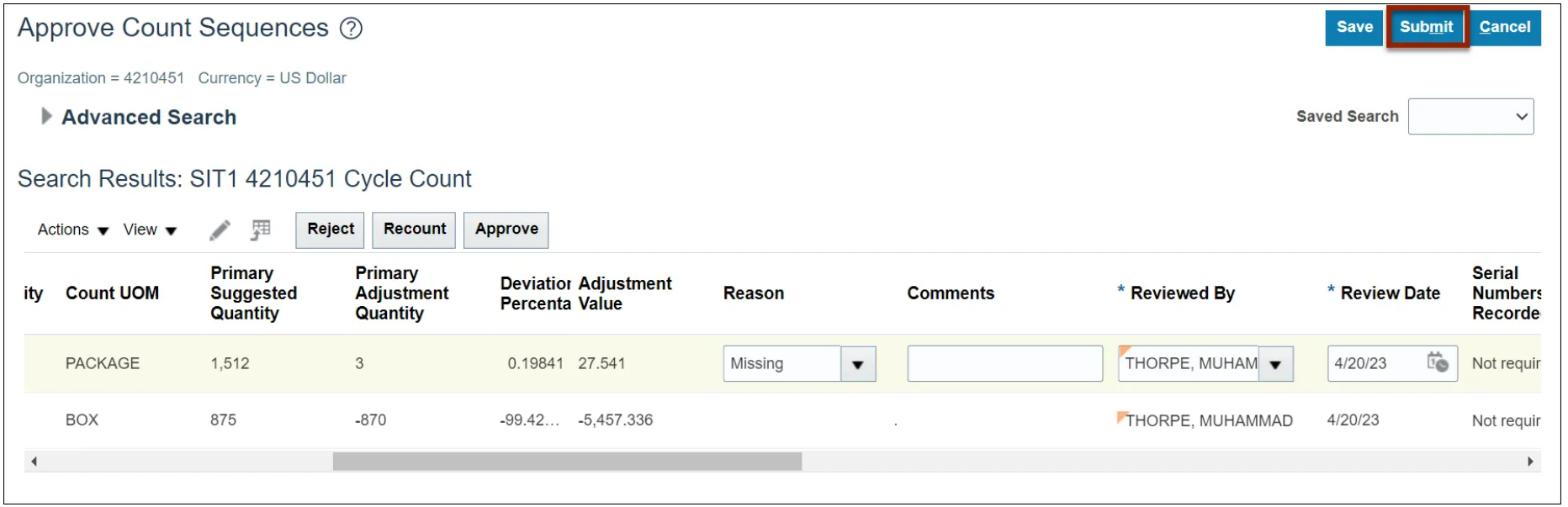
Step 9. Click the **Save** button.

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Step 10. Click the **Submit** button to submit your selected action.

Image



Wrap-Up

Approve cycle counts using the steps above.

Additional Resources

- Virtual Instructor-Led Training (vILT)
  - INV101: Inventory Agency Manager
  - INV109: Inventory Item Maintenance

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