

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.

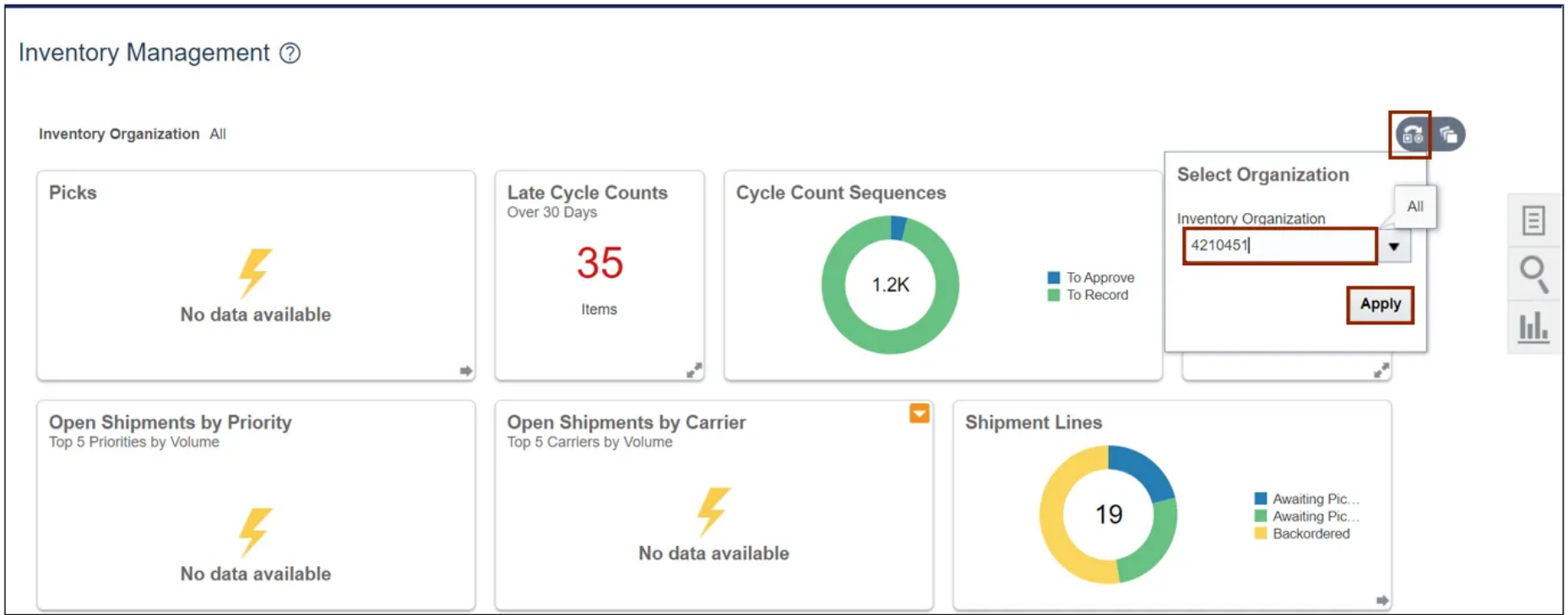
Image



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

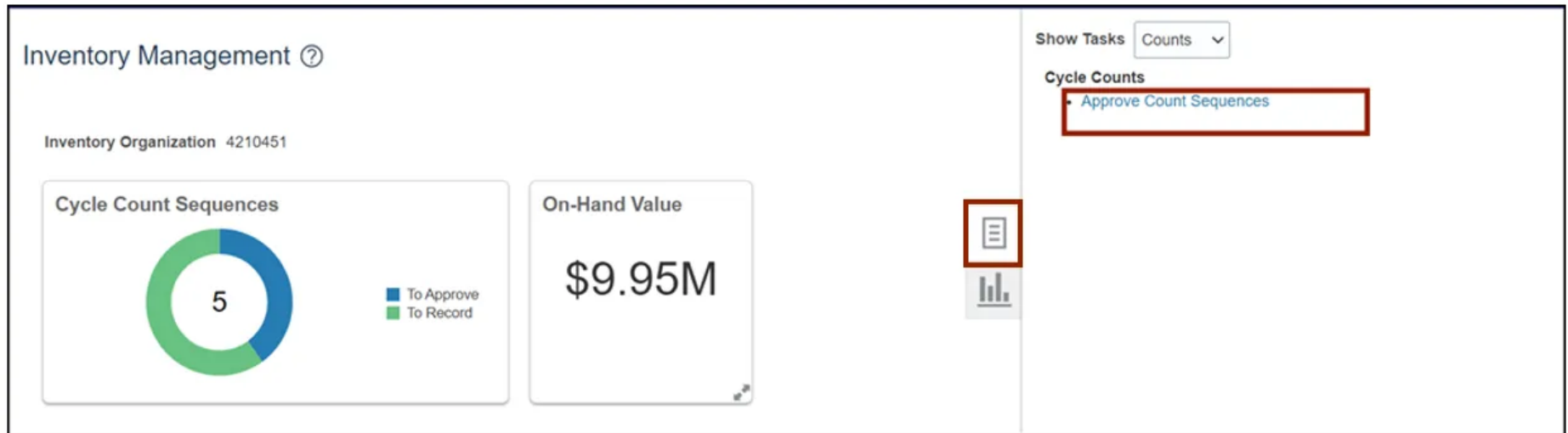
In this example, we chose **4210451**. Click the **Apply** button.

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

Inventory Organization 4210451

Change Organization

Approve Count Sequences ?

Save Submit Cancel

Organization = 4210451 Currency = US Dollar

Advanced Search

Saved Search

▼

* Required

* Count Name Equals SIT1 4210451 Cycle Count ▼

From Count Sequence

To Count Sequence

Subinventory Equals

▼

Item

Q

Counted By Equals

▼

Reason Equals

▼

Approval Status Equals Pending approval ▼

Search Reset Save... Add Fields ▼ Reorder

Search Results

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

Image

Inventory Organization 4210451

[Change Organization](#)

Approve Count Sequences ?

[Save](#)[Submit](#)[Cancel](#)

Organization = 4210451 Currency = US Dollar

[Advanced Search](#)

Saved Search



Search Results: SIT1 4210451 Cycle Count

Actions ▾ View ▾

[Reject](#)[Recount](#)[Approve](#)

	Count Sequence	Item	Item Description	Category Name	Count Sequence Status	Count Quantity	Count UOM	Primary Suggested Quantity	Primary Adjustment Quantity	Deviation Percentage	Adjusted Value
▶	54	0015368	CARBON PENC...	141218-Coated ...	Pending approval	1,515	PACKAGE	1,512	3	0.19841	27.5
▶	55	0002470	BIC METAL POI...	441217-Writing i...	Pending approval	5	BOX	875	-870	-99.42...	-5,4!

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

Image

Approve Count Sequences ?

Save

Submit

Cancel

Organization = 4210451 Currency = US Dollar

▶ Advanced Search

Saved Search

▼

Search Results: SIT1 4210451 Cycle Count

Actions ▼ View ▼  

Reject

Recount

Approve

ity	Count UOM	Primary Suggested Quantity	Primary Adjustment Quantity	Deviation Percenta	Adjustment Value	Reason	Comments	* Reviewed By	* Review Date	Serial Numbers Recorde
PACKAGE		1,512	3	0.19841	27.541	▼		THORPE, MUHAM ▼	4/20/23 	Not requir
BOX		875	-870	-99.42...	-5,457.336			THORPE, MUHAMMAD	4/20/23	Not requir

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

Image

Inventory Organization 4210451

Change Organization

Approve Count Sequences ?

Save

Submit

Cancel

Organization = 4210451 Currency = US Dollar

► Advanced Search

Saved Search



Search Results: SIT1 4210451 Cycle Count

Actions ▼

View ▼



Reject

Recount

Approve

Inventory Item	Primary Adjustment Quantity	Deviation Percentage	Adjustment Value	Reason	Comments	* Reviewed By	* Review Date	Serial Numbers Recorded	Recounts	Subinventory
	3	0.19841	27.541			THORPE, MUHAMMAD	4/19/23	Not required	0	02E2
	-870	-99.42...	-5,457.336			THORPE, MUHAMMAD	4/19/23	Not required	0	02I2

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

Image

Approve Count Sequences ?

Save

Submit

Cancel

Organization = 4210451 Currency = US Dollar

► Advanced Search

Saved Search

Search Results: SIT1 4210451 Cycle Count

Actions ▼ View ▼  

Reject

Recount

Approve

ity	Count UOM	Primary Suggested Quantity	Primary Adjustment Quantity	Deviation Percenta	Adjustment Value	Reason	Comments	* Reviewed By	* Review Date	Serial Numbers Recorde
PACKAGE	1,512	3	0.19841	27.541	Missing			THORPE, MUHAM ▼	4/20/23 	Not requir
BOX	875	-870	-99.42...	-5,457.336				THORPE, MUHAMMAD	4/20/23	Not requir

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

Image

Approve Count Sequences ?

Save

Submit

Cancel

Organization = 4210451 Currency = US Dollar

► Advanced Search

Saved Search

Search Results: SIT1 4210451 Cycle Count

Actions ▼ View ▼

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Reject

Recount

Approve

ity	Count UOM	Primary Suggested Quantity	Primary Adjustment Quantity	Deviation Percenta	Adjustment Value	Reason	Comments	* Reviewed By	* Review Date	Serial Numbers Recorde
PACKAGE		1,512	3	0.19841	27.541	Missing ▼		THORPE, MUHAM ▼	4/20/23 📅	Not requir
BOX		875	-870	-99.42...	-5,457.336			THORPE, MUHAMMAD	4/20/23	Not requir

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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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