

## INV-46 Inventory Item Deletion

### **Purpose**

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation on how to Delete an Inventory Item that is associated to an Inventory Organization in **error** in the North Carolina Financial System ( **NCFS**).

### **Introduction and Overview**

This QRG covers an explanation on how to delete an inventory item that is associated to an Inventory Organization in **error** in NCFS. By deleting the item, the item is removed and will no longer be tracked within that specific inventory organization.

### **Inventory Item Delete**

To delete an inventory item in NCFS, please follow the steps below. There are 18 steps to complete this process.

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

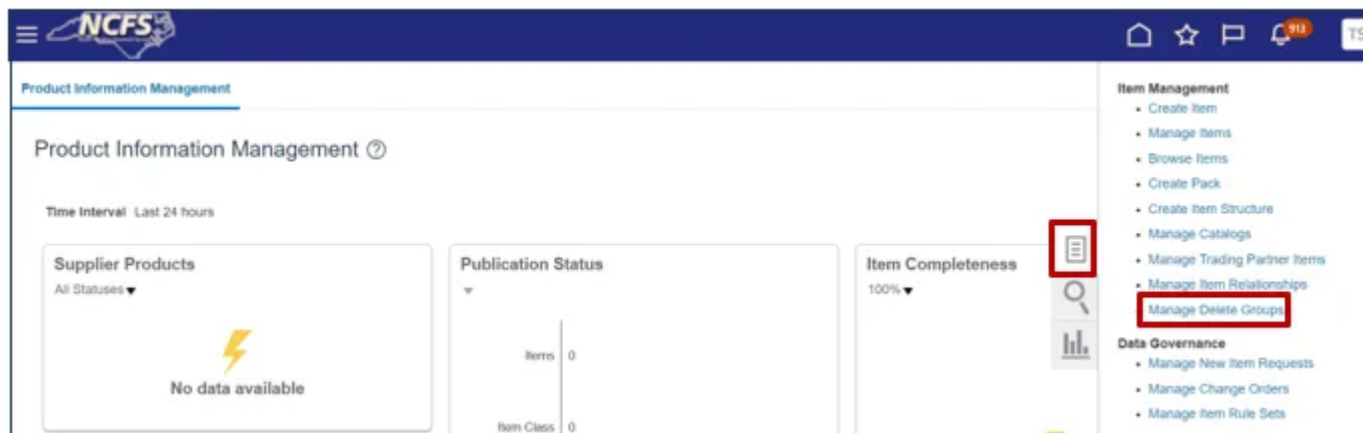
Step 2. On the **Home** page, under the **Product Management** tab, click the **Product Information Management** app.

Image



Step 3. Click the **Tasks** icon and select **Manage Delete Groups**.

Image



Step 4. Click the **Create** button to create a **Delete Group**.

Image

The screenshot shows the 'Manage Delete Groups' interface. At the top right is a 'Done' button. Below the title is an 'Advanced Search' section with a 'Saved Search' dropdown and a note '\*\* At least one is required'. There are six search filters arranged in two columns: Name (Starts with), Description (Starts with), Status (Equals), Last Activity (Equals), Last Activity Status (Equals), and an empty filter. Below the filters are buttons for Search, Reset, Save..., Add Fields, and Reorder. At the bottom is a 'Search Results' section with a toolbar containing Actions, View, Format, a highlighted '+' button, and icons for Freeze, Detach, and Wrap.

Step 5. Name the **Delete Group**. In this example, the group was named **Test Delete Group**. Add a **Description** if desired. Then, click the **Select and Add** button.

Image

The screenshot shows the 'Create Delete Group' interface. At the top right are buttons for Check Constraint, Save, Submit, and Cancel. Below the title is a note: 'Delete group can process twenty thousand records at a time. To delete more records, create multiple delete groups with a maximum of twenty thousand records in each group and submit them for deletion.' There are two form fields: 'Name' (containing 'Test Delete Group') and 'Description' (containing 'Test Delete Group'), both highlighted with red boxes. Below the fields are tabs for Items, Item Structures, Change Orders, and New Item Requests. At the bottom is a toolbar with Actions, View, Format, a highlighted '+' button, and icons for Freeze, Detach, and Wrap. Below the toolbar is a table with columns: Item, Item Description, Organization Name, Organization, Supplier, Address Name, Status, and Details. The table is currently empty.

Step 6. Search for the item to be deleted by using the search fields, then click **Search**. Select the item within the Search Results, then click **Apply**. When the item(s) to be disassociated are selected click Apply, then click **Done**.

In this example, item **0010579** was chosen.

Image

Select and Add: Items

Entity

Item

Search

Advanced

\*\* Item

0010579

\*\* Keyword

\*\* Description

Search

Reset

Search Results

View

Format

Detach

Wrap

|   | Item    | Description                                 | Revision Code |
|---|---------|---------------------------------------------|---------------|
| ▶ | 0010579 | INMATE PANTS, GREEN, MED 31 - 35, 6 PER BOX | 0             |

Columns Hidden 368

Apply

Done

Cancel

Step 7. Double click the item line to edit the item fields. From the **Organization Name** drop-down list, choose the **Inventory Organization** to delete the item from.

# Image

Product Information Management

Manage Delete Groups x

Create Delete Group x

Create Delete Group Test Delete Group

Check Constraint

Save ▾

Submit

Cancel

Delete group can process twenty thousand records at a time. To delete more records, create multiple delete groups with a maximum of twenty thousand records in each group and submit them for deletion.

\* Name

Test Delete Group

Description

Test Delete Group

Items

Item Structures

Change Orders

New Item Requests

Actions ▾

View ▾

Format ▾

| Item    | Item Description                            | Organization Name              | Organization | Supplier        | Address Name             | Status | Details |
|---------|---------------------------------------------|--------------------------------|--------------|-----------------|--------------------------|--------|---------|
| 0010579 | INMATE PANTS, GREEN, MED 31 - 35, 6 PER BOX | ALBEMARLE - CLOTHING WAREHOU ▾ | 424580C      | All Suppliers ▾ | All Supplier Addresses ▾ | Open   |         |

Rows Selected 1

Step 8. Click **Save**. Then click **Check Constraint**. Constraints are reasons that prevent the item from being deleted. Example: Completed Transaction activity.

# Image

Product Information Management

Manage Delete Groups x

Create Delete Group x

Create Delete Group Test Delete Group

Check Constraint

Save ▾

Submit

Cancel

Delete group can process twenty thousand records at a time. To delete more records, create multiple delete groups with a maximum of twenty thousand records in each group and submit them for deletion.

\* Name

Test Delete Group

Description

Test Delete Group

Items

Item Structures

Change Orders

New Item Requests

Actions ▾

View ▾

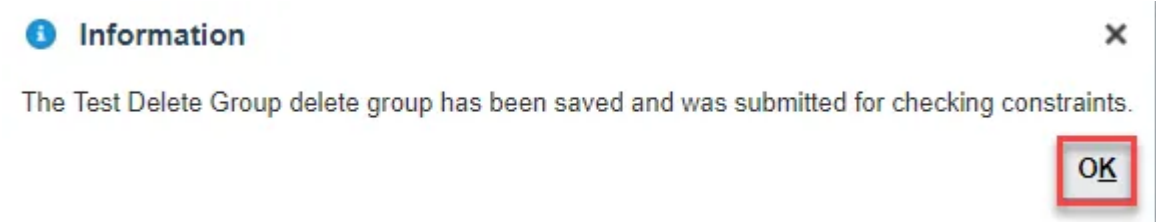
Format ▾

| Item    | Item Description                            | Organization Name              | Organization | Supplier        | Address Name             | Status | Details |
|---------|---------------------------------------------|--------------------------------|--------------|-----------------|--------------------------|--------|---------|
| 0010579 | INMATE PANTS, GREEN, MED 31 - 35, 6 PER BOX | ALBEMARLE - CLOTHING WAREHOU ▾ | 424580C      | All Suppliers ▾ | All Supplier Addresses ▾ | Open   |         |

Rows Selected 1

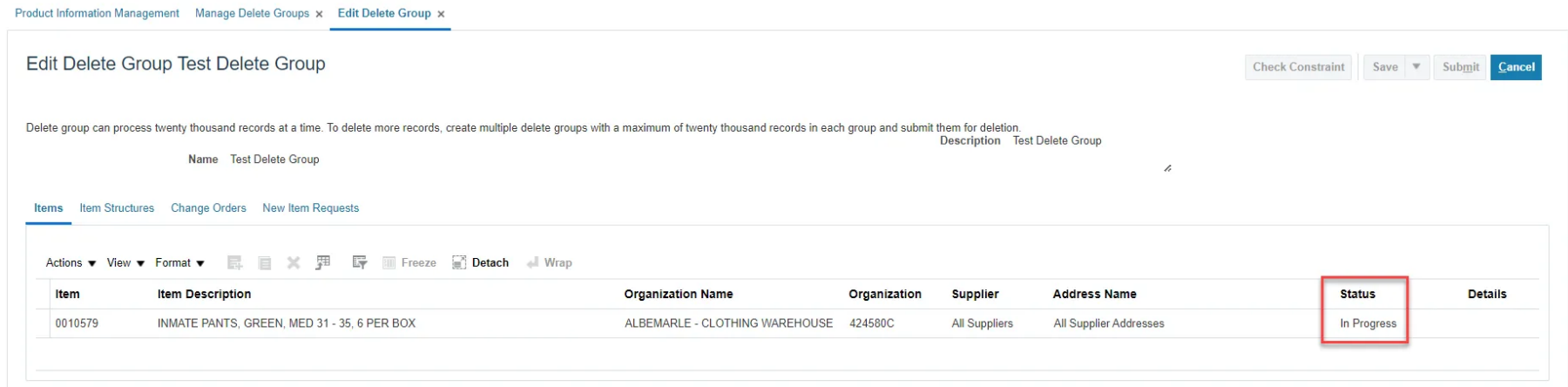
Step 9. An *Information* pop-up will appear, click **OK**.

Image



Step 10. The Item Delete Group **Status** in the Delete Group will show **In Progress** while checking constraints.

Image



Step 11. If the Item Delete Group **Status** shows **Errors**, click the **Details** icon.

Image

Product Information Management Manage Delete Groups x Edit Delete Group x

### Edit Delete Group Test Delete Group

Check Constraint Save Submit Cancel

Delete group can process twenty thousand records at a time. To delete more records, create multiple delete groups with a maximum of twenty thousand records in each group and submit them for deletion.

Name Test Delete Group Description Test Delete Group

Items Item Structures Change Orders New Item Requests

Actions View Format X Freeze Detach Wrap

| Item    | Item Description                            | Organization Name            | Organization | Supplier      | Address Name           | Status | Details |
|---------|---------------------------------------------|------------------------------|--------------|---------------|------------------------|--------|---------|
| 0010579 | INMATE PANTS, GREEN, MED 31 - 35, 6 PER BOX | ALBEMARLE - CLOTHING WAREHOU | 424580C      | All Suppliers | All Supplier Addresses | Errors |         |

Rows Selected 1

Step 12. The **Error Details Window** will appear with an information message regarding the deletion error(s). Click **Done**.

Image

### Error Details

View Format Detach Wrap

**Message**

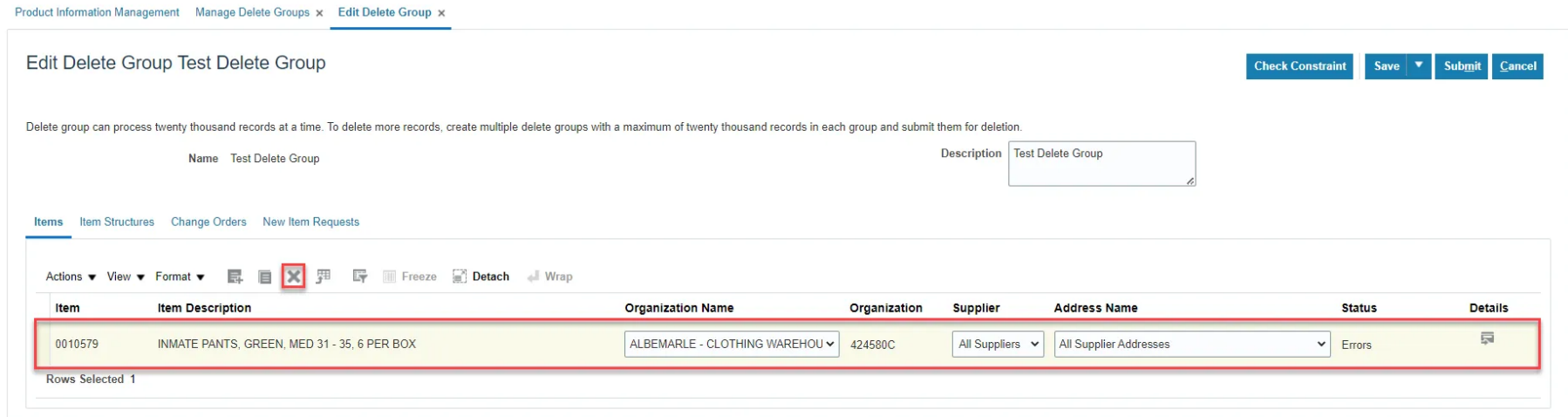
You cannot delete this item because completed inventory transactions exist for this item.

Done

Step 13. This record cannot be deleted due to completed inventory transactions existing. Highlight the row and click the **X** button to remove it from the delete group.

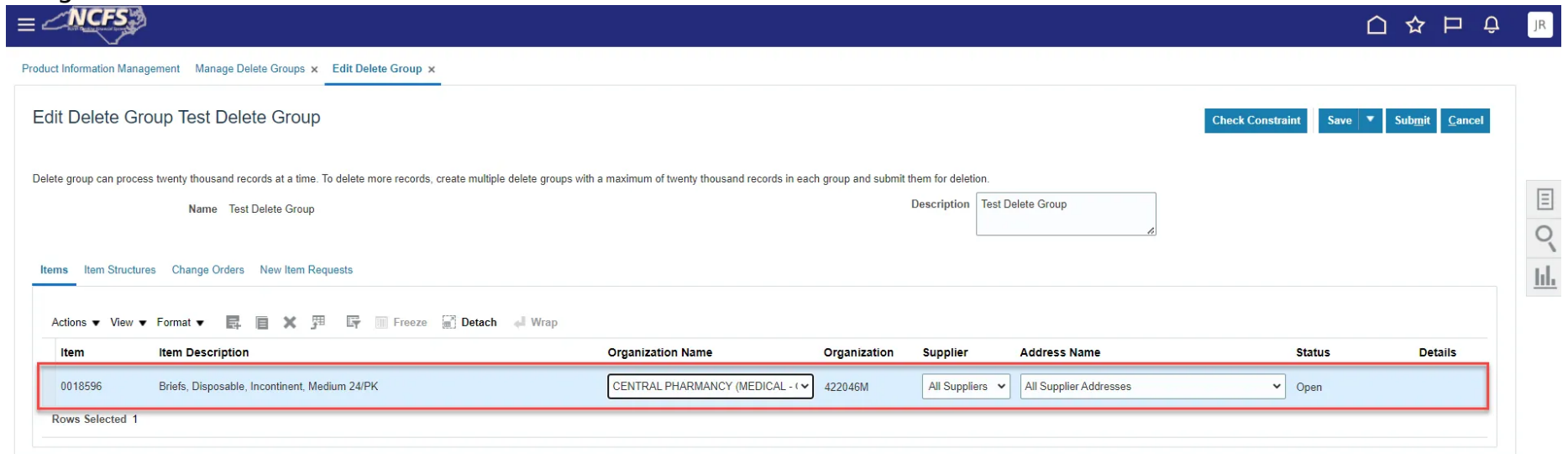


Image



Step 14. Add the next item to be deleted to the delete group.

Image



Step 15. Follow **Steps 7-10** above. Once the **Constraints Check** completes and passes the **Status** will show **Ready for Deletion**. Click **Submit**.

Image

Product Information Management Manage Delete Groups x Edit Delete Group x

Edit Delete Group Test Delete Group

Check Constraint Save Submit Cancel

Delete group can process twenty thousand records at a time. To delete more records, create multiple delete groups with a maximum of twenty thousand records in each group and submit them for deletion.

Name Test Delete Group Description Test Delete Group

Items Item Structures Change Orders New Item Requests

Actions View Format Freeze Detach Wrap

| Item    | Item Description                              | Organization Name                                       | Organization | Supplier      | Address Name           | Status             | Details |
|---------|-----------------------------------------------|---------------------------------------------------------|--------------|---------------|------------------------|--------------------|---------|
| 0018596 | Briefs, Disposable, Incontinent, Medium 24/PK | CENTRAL PHARMANCY (MEDICAL - OTC) - DISTRIBUTION CENTER | 422046M      | All Suppliers | All Supplier Addresses | Ready for Deletion |         |

Step 16. An *Information* pop-up will appear. Click **OK**.

Image

Information

The Test Delete Group delete group was submitted for deletion.

OK

Step 17. Navigate to the **Mange Delete Groups** screen and the Delete Group **Last Activity** will show **Delete Group Submission** and **Last Activity Status Completed**.

Image

Manage Delete Groups ?

Done

Advanced Search

Saved Search

Search Results

Actions View Format + ✎ ✕ 📄 Freeze 📄 Detach 📄 Wrap

| Name              | Description       | BPEL Instance | Status    | Last Submission Date | Last Activity           | Last Activity Status |
|-------------------|-------------------|---------------|-----------|----------------------|-------------------------|----------------------|
| Test Delete Group | Test Delete Group | 11034565      | Completed | 2/29/24              | Delete Group Submission | Completed            |

Step 18. Navigate to **Manage Items** task. Select the **Item Class**. Enter the **Item Number** into the **Item** field. Click **Search**. The deleted item should not be associated with the Inventory Organization (warehouse) selected for deletion.

Image

Product Information Management Manage Items x

Manage Items ? DAC Item Class Done

Advanced Search

Saved Search Application Default

\*\* Item Starts with 0018596

\*\* Keyword

\*\* Description Starts with

Search Reset Save... Add Fields

Search Results

Actions View Format + X Compare Detach Wrap Image Show Manage Item Mass Changes

|   | Image              | Item    | Description                                   | Approval Status | Item Status | Long Description                       | Item Class     | Organization  | Primary Unit of Measure |
|---|--------------------|---------|-----------------------------------------------|-----------------|-------------|----------------------------------------|----------------|---------------|-------------------------|
| ▶ | No Image Available | 0018596 | Briefs, Disposable, Incontinent, Medium 24/PK | Approved        | Active      | Briefs, Disposable, Incontinent, Me... | DAC Item Class | ITEMMASTERORG | PACK                    |
| ▶ | No Image Available | 0018596 | Briefs, Disposable, Incontinent, Medium 24/PK | Approved        | Active      | Briefs, Disposable, Incontinent, Me... | DAC Item Class | 5200DACNI     | PACK                    |
| ▶ | No Image Available | 0018596 | Briefs, Disposable, Incontinent, Medium 24/PK | Approved        | Active      | Briefs, Disposable, Incontinent, Me... | DAC Item Class | 5200DACCENI   | PACK                    |

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## Wrap-Up

This QRG covers an explanation on how to delete an inventory item in NCFS added in Error. By deleting an inventory item, the item is no longer associated with the Inventory Organization selected for deletion and transactions cannot be performed with the item.

## Additional Resources

- Virtual Instructor-Led Training (VILT)
  - [GL100c: Journal Entry](#)

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