Item Data Management

Owner of this document is: Scott Wiacek – swiacek@feedingamerica.org

Purpose of this document

This document is designed to demonstrate how to use the Item Batch Update report to update Item Data. This allows you to quickly update Item Data based on desired filtering.

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# Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>PURPOSE</td>
<td>3</td>
</tr>
<tr>
<td>ITEM BATCH UPDATE REPORT</td>
<td>3</td>
</tr>
<tr>
<td>RELATED TOPICS</td>
<td>6</td>
</tr>
</tbody>
</table>
Purpose

The Item Data Management functionality provides food banks with the ability to mass update certain Item fields and allows you select/filter for the Items to be updated. An Excel output is provided after the process has been run to provide the user with immediate feedback as to any errors, and which Items/data have been updated.

_Ceres Object release 4.51.49 is required for the functionality described in this document._

Item Batch Update Report

1. The Item Batch Update report link can be found at Departments ➔ Warehouse ➔ Inventory ➔ Reports ➔ Item Batch Update.
2. When you run the Item Batch Update process you can drill down on the Item Update Field List to view the available fields to update.

A new window is displayed showing the list of available fields. You can populate the “New Value” column of any of the fields to update the data. When a value is added to the “New Value” column the “Update” column automatically gets checked to let the system know the field will be updated.

**Update:** This field gets automatically checked when you enter a value in the “New Value” column. The user can manually check/uncheck this field. If it is checked then the system will update the field data, and if it is not checked, the system will skip it.

**Field Name:** The field name from the Item Card/List that you would like to update.

**New Value:** The value that you want to populate/update for desired Items. You can drill down on this column for fields that have options to select.
3. You can then filter for the Items that you want to update.

NOTE: All Items meeting the filtered criteria will be updated. If no filter is specified ALL Items will be updated.

4. After the report has run an excel sheet opens showing you which Items have been changed, which fields have been changed, and any errors if the report encountered any. This excel sheet must be manually saved, if you want to keep it for logs.

<table>
<thead>
<tr>
<th>Item No.</th>
<th>Description</th>
<th>Field Name</th>
<th>Error</th>
<th>Error Message</th>
<th>Expiration Calculation</th>
<th>Feature Type</th>
<th>Dormant</th>
</tr>
</thead>
<tbody>
<tr>
<td>TEST001</td>
<td>Test Item 1</td>
<td></td>
<td></td>
<td></td>
<td>1D</td>
<td>Free Item</td>
<td>No</td>
</tr>
<tr>
<td>TEST002</td>
<td>Test Item 2</td>
<td></td>
<td></td>
<td></td>
<td>2D</td>
<td>New Item</td>
<td>No</td>
</tr>
</tbody>
</table>

NOTE: The first row for an Item in the Excel spreadsheet is the old value of fields. The second row is the new value.
Related Topics:

1. Item Overview