BYU
Dining Services

Standard Operating Procedures

BP0002: Managing Eatec Inventory Items

Business Process ID: BP0002 **SOP Collection:** Eatec SOPs **Last Updated:** April 1, 2024 **URL:** /policy/eatec/inventory	**SOP Owner:** Doug Walker **Accountable Group: Dining Accounting** **Collaborative Business Process**

Purpose

This standard operating procedure outlines the processes inventory users follow to create and modify inventory items. This includes the steps to properly name items and assign class, type, subtype, and description for the item being modified/created.

Responsibilities

Area Responsibilities	Centralized Responsibilities
• Manage department-owned inventory items following the processes outlined in this SOP. • Collaborate with inventory users from other departments in managing inventory items used in multiple departments ("global items"). • Contact the Dining systems coordinator (Doug Walker) to resolve any differences in the setup of global items or for additional training on item setup.	**Dining Accounting** **Doug Walker** • Monitor item setup to ensure conformity with this SOP. • Answer inventory user questions and resolve differences. • Final say on inventory item setup and management.

SOP User Guide

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Definitions

Brand Name: The brand by which the item is called (Ex: BYU, Blue diamond, Great Value) "FG Production Area" will be used to designate items created in either the CSC or CFK production facilities.

Item Name: The basic name of the item without further modifying descriptions (Ex: Almond, Lemon Bread, Strawberry)

Essential Description: An included description of the item without which the item could not be identified otherwise. (Ex: Roasted, Finely Ground, Gluten-Free)

Retail Item: Items that dining services is buying to resell (Ex: Blue Diamond Almond Roasted/Salted 6oz sold at the CONE)

Non-retail Item: Includes everything else that is produced/used by BYU for production or self-use. (ex: Oil Canola Oil 36 oz; frying oil used to fry fries)

Size: The total quantity of product provided when purchased (includes package counts and pack sizes; oz, count, lb., etc.) EX: 4 packs of 6 sharpies each, 2 40lb bags, 4 pack of 12-ounce bottles

Types: Would be a broad category for what the type of item it is. (Ex: dairy, supplies, juice, paper goods, etc.)

Subtypes: Would describe the type, such as seasonal, Christmas, valentine, beef, cheese, etc.)

Classes: Classes are the location that utilizes the item, that location is considered the main 'owner' of the item, *For items frequently transferred there would be no main owner rather a global class would be assigned such as "Dining Services"; (Ex: Creamery on Ninth, Food to Go, Legacy Grille, etc.)

Description (Free Field): Anything that you would need to search for that is not the other searchable fields (Possible options include Ex: Main supply item #, Lot number, special order item)

Base Unit: The most basic unit given by the supplier (Ex: Beef coming in a 10lb case would be set as pound for base unit), or the unit in which the item is sold for retail or finished good items.

Purchase Unit: How the inventory item is purchased from the supplier, this is selected by what the supplier information shows (For the beef coming in a 10 lb case, the purchase unit would be a case with a conversion of 10lbs/case)

Transaction Unit: This would be the units within the case. Typically, this would show smaller packages within a larger purchase unit.

Recipe Unit: This is used to display how the item is used in recipes. (Ex: Flour would likely be used in cups while spices use teaspoons.

Creating an Inventory Item

Items or Items as used in Eatec refers to raw materials or finished goods that are associated with quantity and costs. Inventory items are used as ingredients in recipes or are linked to products to be sold. We do not sell inventory out of Eatec, but we sell products that are linked to inventory that deplete our inventory.

Few users at BYU have the ability to create new Inventory Items. If you do not have the ability to create a new inventory item, please email the item creation team at itembidcreation@byu.edu. The item creation team will have the item created within 1 business day.

In your email, please include the following:

- Supplier Name
- Supplier Item Number
- Name of the item
- Supplier price if available
- Suggested recipe and transaction unit if available

Steps to Create Inventory Items:

1. **Navigate to Inventory List**
    - Click Masters -> Inventory List
2. **Create a New Inventory Item**
    - Click ‘Create New’ button in the top right-hand item corner
3. **Enter the Item Name**
    - Follow the naming format below for naming items, see examples below. For definitions of what each component of the name means see definition section above
        - **Brand Name (If applicable) – Item Name- Essential Description (if applicable) – Size**
            - ** OR if the item is a finished good**
        - **‘FG’– Location Code – Item Name – Essential Description (if applicable) – Size**
    - For finished goods, rather than having the ‘Brand Name’, we are putting ‘FG’ followed by the location code so that areas can know where that finished good is being produced.
4. **Managing Item Numbers and Barcode**

- When creating an item, no number should be entered into the number field as Eatec will automatically generate an 8- digit number.
  - The only exception to this procedure is AFS items. For these items, the AFS item number should be input as the Eatec item number. This is due to current technology restrictions in place for automating AFS Merchandise Arrivals.
- The displayed barcode for an inventory item should be the primary barcode for that inventory item. These barcodes should be for the base unit of the item and should be visible on either the item itself or whatever packaging the item was received in.
- If the item is a finished good item, a barcode will need to be generated by the person creating the item to ensure that the barcode is valid and so that Dining Designs can make labels for these items.
  - There is a spreadsheet called 'Master EATEC Barcodes 2020.xlsx' that is maintained by Dining Accounting. If you need a new barcode for a finished good item, please reach out to Dining Accounting and they will set up the barcode for you.
- Most barcodes should be 14 digits long

5. **Enter Type, Subtype, and Class**
   - The type field is the broad category for what the product is. Pick the most applicable from the drop-down list. See type definition above.
   - The subtype field more narrowly describes what the product is and should be more specific than the type. Pick the most applicable from the drop-down list.
   - The class indicates which area is the main owner of the item. Each location will be given a class that reflects their name and there will also be a generic class of 'Dining Services'.
     - If the item needs to be viewed by multiple locations and is commonly transferred among locations, it will need the class 'Dining Services'.
     - If the item is specific to one of two areas, then the primary owner should be assigned to the class. Class should be limited to a production area, a Franchise Location (for franchise specific ingredients), or Dining Services.
     - The franchises currently include Chick-fil-A (CFA), Jamba Juice (JJ), Papa Johns (PJ), Subway (SW), Wendy's (WD).
     - If it is a general product that will be sold from multiple locations, select "DS" (Dining Services). Most items will be 'DS' class.
     - The main exception to the 'Dining Services' class rule as stated above are finished goods. The class for finished good items should reflect the location that produces that finished good.
   - Most if not all types, classes, and subtypes should be already created, if you feel like there is a type, subtype, or class missing please email dininghelpdesk@byu.edu about the issue.
6. **Enter the Description, do not check Hazmat**
   - The description field is also searchable and should contain any other information that a user may need to find items in Eatec. The user may decide what to put in this field.
     - It is highly recommended to enter the Supplier Item Number in the description as to be able to search for that item later by supply item number
   - Generally, if the item is a retail item, then the description will start with the barcode
     - It is important to note that the description does not usually appear on reports, and therefore should be used for extra information when searching.

- BYU is not currently utilizing the Hazmat function in Eatec, do not check the Hamzat checkbox.

7. **Set Appropriate Units**
   - Unit setup is one of the most common areas where mistakes are made when setting up inventory items. Please make sure that the units you are using to define the item are correct. If you have any doubts about the
   - Under Inventory Details tab, the user must define 4 units for each item:
     - **Base Unit**: The most basic unit given by the supplier (Ex: Beef coming in a 10lb case would be set as pound for base unit), or the unit in which the item is sold for retail or finished good items.
     - **Purchase Unit:** How the inventory item is purchased from the supplier, this is selected by what the supplier information shows (For the beef coming in a 10 lb case, the purchase unit would be a case with a conversion of 10lbs/case)
     - **Transaction Unit:** This would be the units within the case. Typically, this would show smaller packages within a larger purchase unit. It often reflects the purchase unit.
     - **Recipe Unit:** This is used to display how the item is used in recipes. (Ex: Flour would likely be used in cups while spices use teaspoons.)
       - Check with the supplier label or a book of yields to see how much of the particular item is in the preferred volume amount.
8. **Enter Remarks**
   - The remarks are to be for more descriptive optional comments.
   - The remarks field is generally used when items are updated for nutrition purposes or other major changes to the item or supplier.
9. **Enter Other Fields**
   - Under the 'Other Fields' section there are three fields.
     - Production Recipe: This will be the recipe that produces and increases the quantity of the item. All finished goods must have a production recipe.
     - Alt Production Recipe: This will allow the user to choose an alternate recipe they would like to produce in the production module. Currently, BYU will not use this as we produce our goods from a single recipe.
     - Supplier: This is a tag for which supplier supplies this item, but because many items are sourced from multiple suppliers, BYU will not use this field.
10. **Enter Item Settings**
    - Click the 'Settings' tab to navigate more in-depth Inventory settings.
    - **Depletion Location**: This will set a specific location to deplete no matter where the item is actually depleted. BYU does not currently use this feature.
    - **Waste Factor:** BYU does not use this feature.
    - **Zero Cost Item:** Items will only be set to zero cost if we only want to track inventory and not cost (items on consignment). Otherwise, this should be set to 'Normal Costing'.
    - **Tracking Flag**: Default to 'No Tracking', if the item is to be lot tracked, set the flag to 'User Defined'. If the item is set to 'User Defined', see the Lot Tracking SOP for more details.
    - **Shelf Life**: BYU will leave this empty.
    - **Inventory Account:** BYU does not use this feature.
    - **Cost of Sales Account**: BYU will leave this empty.

- **Catch Weight**: BYU will leave this empty. BYU will not use the catch weight flag on the item.
- **Low Temperature:** BYU will not use this feature.
- **High temperature:** BYU will not use this feature.
- **Tolerance**: BYU will not use this feature.
- Site Specific Settings (Do not change any of these settings)

11. **Enter Nutrition**
    - Only the Dining Nutrition team should add nutritional information to an item
    - **USDA Nutrition Link:** Only use USDA information if the item is a generic, uniformly manufactured item (such as spices or vegetables) and there is no individualized nutritional information on the supplier website
    - **Grams per serving:** gram weight of one serving according to supplier's nutrition label
    - **Allergens**: Select all allergens that apply to the item
    - **User-Entered Ingredients**: Enter all the ingredients. If an inventory item has multiple ingredients, they should be separated with semicolons (Ex: Semolina; Durum flour; Niacin). Each word should be capitalized.
    - **Ingredients**: Should be left blank
    - **Refuse**: Waste or what is thrown away (applicable to both inventory and recipe nutrition) Use this if part of the initial inventory item is being thrown away or not used (Ex: heals of bread for a sandwich)
12. **Save the item**
    - Click 'Save' at the top right

Editing an Inventory Item

Editing an inventory item follows the same general process as creating an inventory item, however a few additional fields will be available to edit after the item is initially created. These fields are found in the Location, Bins, Lots, Supplier Bids, and Barcodes tabs and contain additional setup that may be necessary for your area properly setting up and using an inventory item, ensuring accurate depletion, physical inventories, and depletion.

1. **Navigate to Inventory List**
    - Click Masters -> Inventory List
2. **Search for an Inventory Item**
    - Seach using the search bar or using the advanced search button ( ) to find the recipe.
3. **Edit the Item**
    - Click 'Edit' (Edit) at the top right corner.
4. **Add Additional Item Details**
    - After the item is first created and saved, 5 new tabs will be available to view or edit: Location, Bins, Lots, SupplierBids, and Barcodes
5. **Location Details**
    - Under the location tab, location specific details can be entered by clicking the row with the location
    - Min/Max Par: The user can choose to set a min or max par for a given location. In the requisition, transfer, and PO module, the user can use the min/max pars to aid with ordering

- Depletion Option: Most often this is set to '(not used)', but for items that not held in inventory, like cleaning suppliers, this can be set to 'Deplete on Arrival'
- Production Option: This will be set to 'Standard' for most items. If you would like to set this item to be produced whenever it is transferred from a location, then set this to 'Via Transfer'.
- All other fields in this view are view only and cannot be edited.

6. **Bin Details**
   - To add the item to an existing zone and bin, click the 'Add New' Button next to 'Bins' (Bins ADD NEW)
   - A popup will appear requiring a location, zone, bin, max bin capacity for that item, current bin quantity on hand, and the bin priority. Please enter the information and click 'Add'
     - If your zone or bin does not appear, please ensure that the correct zone and bin has been set up. Managers will have access to add or remove bins as they please. If you need to add or remove a zone or bin, talk to your manager
7. **Lots**
   - If the item is a lot tracked item, then this tab will show the different lots received, produced, or transferred. If the item is not lot tracked, please ignore this tab.
   - To make edits to a lot, click into the desired lot and location to edit.
   - A popup should appear with three editable fields: lot id, QOH, and expiry date.
   - **Lot Id**: If the lot id was initially entered incorrectly, the user can edit the lot id for accuracy
   - **QOH**: If the quantity on hand is incorrect, you decrease, but you cannot increase the QOH greater than that locations' total QOH.
   - Expiry Date: Add a new expiration date
   - Reason: If you edit any of these fields, a new field will appear asking for the reason for the adjustments, enter the reason.
8. **Supplier Bids**
   - Under the SupplierBids tab, you can add bids for that item.
     - Only authorized personnel should add or adjust bids. Dining Accounting, Purchasing, Dining Distribution, and the Commissary are the only areas that can edit their item's bids.
   - To add a new bid, search for the supplier in the search bar. Once you have found the supplier, click it and click 'Select'

   - A bid will automatically be added. To edit the bid, click the bid line.
   - In the pop-up, enter the Supply Item Number, the Purchase Unit, Bid Price, Pack Size, Effective Date, Expire Date, and Priority. These are key fields for correct item bids
   - Do not edit Bid Region, Bid Currency (should be USD), Shipping/Unit, or Catch Weight
   - For reference, you can add a minimum order quantity and lead time, but this will not be enforced by Eatec when creating a PO.
   - If the item has a contracted yearly price, set Contracted to 'Contracted'. This will be for reference only.
   - Click 'Save'
   - Repeat for each item supplier
     - For more instructions relating to item bids, please see the **Suppliers SOP**

9. **Enter the barcodes**
    - While many items only have one barcode that is entered during the initial creation process, some items have multiple barcodes.
        - For example: a pack of Coke can have the barcode for the 'pack' and an 'each'
    - To add additional barcodes, click 'Add New'
    - In the popup, enter the new barcode, the unit, the pack size, and the unit type. Any remarks are optional.
    - Click 'Add' and the barcode will be added.
10. **Save all Edits**
    - Once you are done modifying the item, click 'Save' in the top right.
        - If unsaved changes have been made and you have clicked to navigate to a different module, a popup will appear asking for confirmation to leave the inventory item module.

Managing, Copying, and Deactivating an Inventory Item

- Managing Inventory Items
    - Enables managing packages, replacing base units, replace items, defining products, or print nutrition
    - The replace base unit is a very dangerous function and should only be used by those authorized to edit a base unit. Editing base units can often cause conversion errors. If you feel you need a change to a base unit, contact Dining Accounting.
    - The replace item function is used when an item is discontinued, and a replacement item has been identified. Rather than having to find all packages, products, and recipes individually and replacing them all individually, Eatec can mass replace all existing items with a new item. Please consult with Dining Nutrition for replacing within a recipe and dining accounting for changes to products or packages.
    - The define product function will allow the user to create a product starting with the inventory item. For more information, see the Products SOP.
    - Print Nutrition will create a print of the item nutrition page.
- Copying an Inventory Item
    - If you would like to create a new item based on an old item, click 'Copy' in the top right-hand corner. This will populate a new item with the existing item settings.
- Deactivate an Item
    - To deactivate an item, click the 'Deactivate' button. Please do not add 'zz' in front of items to deactivate them.
    - If the item is connected to a package, recipe, or product a popup will appear informing you that an item cannot be deactivated until it is removed from all other linked packages, recipes, or products. If this occurs, please contact the recipe/product authors. Those areas will need to find a substitute item or deactivate the recipe or update the product.

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