# BPCS Item Undertaker™
## Putting old items to rest with less digging

## INV100 is like shoveling water uphill

Deleting items from the **BPCS** or **ERP LX** item master file deserves recognition
as the "most frustrating process ever invented by SSA." It's terrible … almost seems as if the
principle design objective for the item deactivation option was user frustration.

Judging from the generous supply of obsolete items found in item masters, even expert BPCS users
haven't found a way to overcome the frustration. If you've ever tried to soft delete an item from
BPCS, you know all about the problem and the evidence populates your item master file in the
form of item warnings inserted in the item description field, like these:

> **" \*\*\*\* obsolete \*\*\*\* can't delete "**
>
> **" >>> no new orders "**
>
> **" tried to remove – part # discontinued "**

For those unacquainted with the item deactivation chore, INV100 performs edit checks to insure
that the candidate for deletion is not referenced anywhere in the BPCS database (other than the
item master file). If any such reference is found, BPCS will not deactivate the item until that
reference is removed according to BPCS rules. That due diligence is a good idea, but the way BPCS
goes about it has inspired the "like shoveling water uphill" analogy since System 36 days.

> There are many categories of roadblocks that stand in the way of deactivating an
> item. INV100 informs the user only about the first roadblock it encounters. The user is
> directed to go fix that and then run INV100 again to find the next roadblock. Until all
> facets of the first roadblock are erased, there is no way to figure out what the next
> roadblock is going to be.
>
> The frustration level goes up as users plunge into the process of removing a specific
> roadblock. INV100 produces a message that a category of references has been found,
> but it fails to provide a list of the specific instances that exist within that category. So
> the user is left to his/her own archeological devices to go find all of them and get rid
> of all of them. If even one is missed, the next "try running INV100 again" experiment
> produces precisely the same non-specific message as it did the last time.
>
> If frustration was the objective, it's a masterful piece of programming.

By the way, some of the roadblock categories are embedded in the most sophisticated corners of
the BPCS database. Therefore, the frustration can't be delegated to a BPCS rookie. Instead, the
chore remains in the hands of the resident BPCS expert, a perpetual entry at the bottom of the
"things-I-want-to-get-back-to-someday" list.

## Three more insights about vanilla BPCS/ERP LX

**#1** If an analyst worked hard enough to actually deactivate an item with INV100, the deactivation might end up being ill-advised. That's because BPCS doesn't do a thorough job of checking its database before performing the soft delete nor does it support the process of looking for item references associated with user-invented BPCS customizations.

**#2** Anyone who has access to INV100 also has authority to deactivate items. There's no workflow hook in vanilla BPCS which could be used to elevate the final deactivation decision to a senior Engineer/Scientist with Engineering Change Management oversight. This is an internal control vulnerability.

**#3** If your company has thousands of item master records, it's a major undertaking just to figure out which of those items should be nominated for a time-consuming deactivation eligibility analysis.

## Introducing the solution: Item Undertaker software

This is a very powerful piece of software that delivers an impressive labor-savings ROI vis-à-vis vanilla BPCS or vanilla ERP LX. The user-friendly features of Item Undertaker were suggested by BPCS experts who are intimately and painfully familiar with INV100 frustrations.

First of all, Item Undertaker greatly simplifies the process of finding the most likely candidates for deactivation. The software can nominate items for deactivation analysis based on findings from an automated series of pre-programmed selection methods.

> At the conclusion of the automated analysis, the software presents a list of candidates nominated for deactivation analysis based on total cumulative point score. Items accumulate points towards a total score each time they are discovered by one of the selection methods.

The user can then assign any subset of the nominated candidates to a deactivation approval batch. Item Undertaker's robust selection and sorting functionality can be employed to custom design each subset. For example, a user may want all items in a batch to have the same item class, or to have the same primary vendor, or to have a high-end cumulative nomination point score.

Item Undertaker can then produce an Approval Solicitation Report which is designed to support an engineering change analysis process for each item in the batch. The report includes an executive summary sign-off sheet and supporting pages with roadblock-by-roadblock information for each item.

> An Approval Solicitation Report user can efficiently review all data pertinent to the deactivation decision for a given item. That's because Item Undertaker's search for roadblocks is more thorough than INV100's edit checking and all of the database references discovered within each roadblock category can be accessed interactively.

The product's "nominate-candidate-items-for-analysis" functionality has been segregated from its "deactivate-items" functionality. A deactivation password is needed to proceed from the nomination stage to the item deactivation stage. The password holder has the authority to transfer some/all of the items in a deactivation approval batch to "Death Row" status.

> The deactivation password can be employed as an internal control hook that requires signature approval before an item can be moved to Death Row status. Ideally, signature authority would be vested in an individual (or group of individuals) with engineering change oversight.

# Introducing the solution: Item Undertaker, *continued ...*

Once an item is in the Death Row file, Item Undertaker generates a "Removal Action Plan" that enables a user to efficiently overcome those roadblocks that demand manual attention. Detailed roadblock removal information can also be accessed interactively for Death Row "inmates." Once all roadblocks that require manual intervention have been cleared for a given item, Item Undertaker can automatically remove all the other roadblocks to removal and then launch an INV100 session that will be immediately successful in deactivating the item.

# The free demo provides some very interesting data

The Item Undertaker demo provides a very valuable piece of intellectual property: it generates the entire list of candidates that are nominated for deactivation analysis. Now, if one of your part numbers appears near the top of the nomination list and that item doesn't have one of those "**** inactive item # ****" warnings in the item description field, that would be a very interesting finding for your company. Furthermore, you could test the adequacy of your company's balance sheet reserve for inventory obsolescence by simply extending each item on the list of nominated candidates by quantity-on-hand and standard cost.

The demo will also enable you to process several item deactivations; be prepared for a very persuasive demonstration experience. Here's a link to the **demo download**.

# The case for deactivating obsolete items

Judging from the deadwood found in almost any BPCS item master file, the item deactivation process has rarely if ever been on the things-to-do list. When companies ask if the neglect has any unfavorable consequences, here's how we respond:

- Obsolete items introduce a product quality risk. For example, an alternative bill of material may still reference a component that was supposedly replaced some time ago.
- There's no way to prevent accidental usage (e.g. a purchase order or a shop order) of an obsolete item. Probably, the first prevented accident will more than pay for a copy of Item Undertaker.
- Every day, BPCS users must scroll past useless lines of dead items on display screens.
- The clutter of obsolete items on printed reports wastes paper while diluting attention to items that really merit user attention.
- Cost roll-ups could still include values for parts that were supposed to be retired a long time ago.
- Ancient purchase orders still sit open waiting for delivery of a residual quantity of an obsolete part. BPCS manufacturing planning mathematics presume that the sum of all those small, over-due quantities will arrive in stock today.
- If cycle counting frequency for an obsolete item is not set to zero and some residual stock evaporates between cycle counts, yet another inventory transaction for the item is introduced into the transaction history file.

# More details about Item Undertaker functionality

The software has some very intriguing and unexpected features. Click **here** to learn more about those, including how Item Undertaker has been designed to cope with challenges introduced by BPCS customizations (e.g. item master file extensions) and third-party systems that have been integrated with BPCS.

# The "survivors" merit data integrity attention

Some percentage of the candidates Item Undertaker nominates for item deactivation consideration will probably survive that analysis and stay out of "Death Row." Tribal knowledge will save some for sure. After the "undertaking" project is abandoned for a nominated item, we would strongly recommend that these "survivors" be inspected carefully to fix the issues that prompted the Item Undertaker nomination. Here's why:

> The database sifting Item Undertaker performs to select candidates is based upon a slice of technology from Unbeaten Path's **Internal Control Microscope**™ software. An important element of Item Undertakers approach is to search for BPCS data anomalies and inconsistencies which suggest an item isn't configured properly.

> Our thesis for nominating an item for deactivation analysis is this: if the configuration for a given item is somehow at odds with MRP II principles (good business practices) or BPCS rules, then perhaps the reason that the problem has escaped earlier notice is because the item hasn't been used.

So, if your enterprise elects to *not* deactivate one of Item Undertaker's nominees, then by all means, dig into the configuration problem(s) that Item Undertaker noticed and get them resolved. Why? Because if you're now using or plan to use a survivor, the existing configuration will likely cause unexplained and/or unacceptable operational accidents.

# There's more to do after deactivation

Soft deletion (or deactivation) does **not** accomplish the following additional constructive steps:

1. Physical removal of the deactivated record from the item master file.
   *Until this is done, BPCS inquires will continue to display deactivated item descriptions in closed orders. Furthermore, it's possible for non-vanilla BPCS programs or queries to access the record.*
2. Removal and archival of all transaction records that had been associated with that soft-deleted item number.
3. Recovery of the disk space that had been consumed by records that have been removed by the archiving process. This must be accomplished by reorganization of each pertinent file.
4. Removal and archival of item records from item master extension files, including extension files that users decided they would not inform Item Undertaker about.
5. Removal and archival of transaction records associated with deactivated items from other user-invented databases, including databases that users elected to not inform Item Undertaker about.

Those five constructive steps can be addressed and efficiently accomplished by using Unbeaten Path's **Locksmith**® archiving software.

# Questions ?

It would be a privilege to answer any questions about **Item Undertaker** software. Here's Unbeaten Path International's contact information:

**North America:**  (888) 874-8008
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**Send us an e-mail** ( click **here** )

Here's another copy of the **demo download** link.