

*myridas*TM *User Guide*

Version 7.6 for Great Plains 7.5

Item Manager



Trinity Computer Services Limited

May 2003

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Using this Guide

The graphics in this document are best viewed or printed with Adobe Acrobat Reader version 4.0 or above.

This guide provides user notes for the Myridas Item Manager module:

- Item Manager



The mouse symbol has been used throughout the manual to help guide you to the location of windows in the software. See [Appendix A](#) for a list of Myridas windows and their location in the software.

A full range of tutorials is also available on our website, <http://www.trinitypartner.com>.

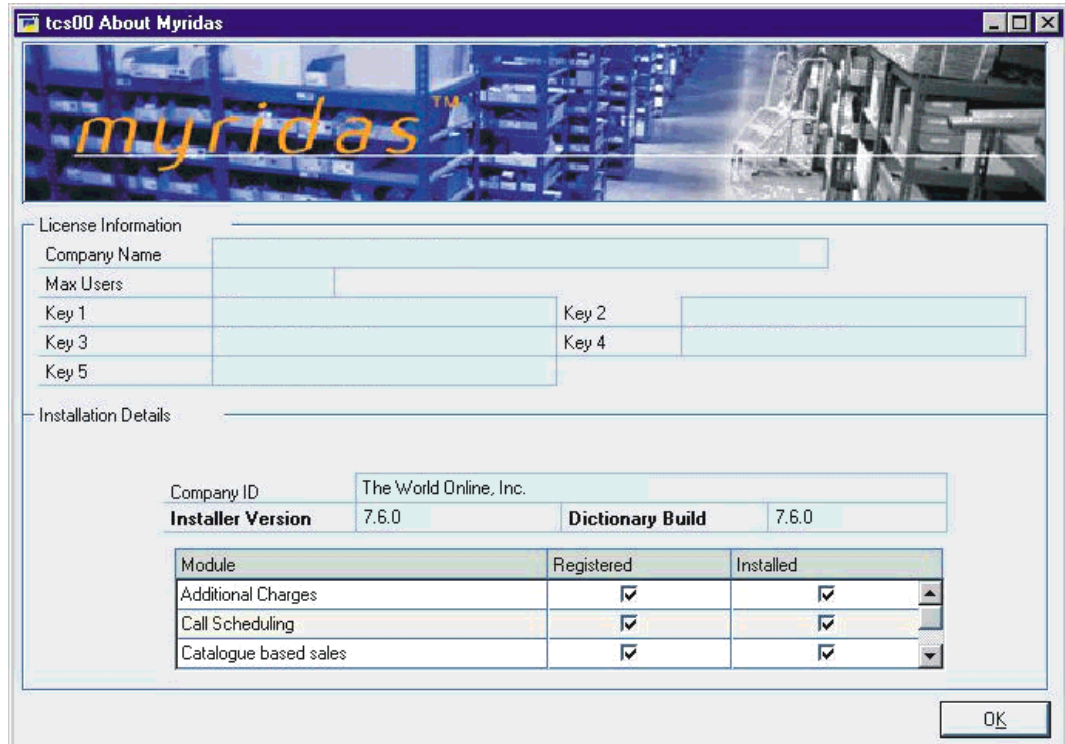
About Myridas



Cards >> Myridas Setup >> About Myridas

Use the About Myridas window to check your license information and installation details. The window will tell you which Myridas modules you are registered to use and which have been installed on your system.

The About Myridas window



Item Manager

The Myridas Item Manager module is designed to facilitate the creation of new items and the assigning of items to sites. Enhanced performance is given via two new features, the Myridas Copy Item Wizard and the Myridas Item Site Assign Wizard.

With standard Great Plains the creation of new items, no matter how similar, must be performed individually. The Myridas Copy Item Wizard allows the user to choose one existing item as a template and then copy selected information from this item to generate unlimited item master records. For the new items the user can enter item codes and descriptions individually or merge these details automatically from an external source such as a spreadsheet.

The Myridas Assign/Unassign Sites Wizard allows the user to perform mass assigning of items to and from sites. Rather than removing obsolete stock from a site one item at a time, you can use the Assign/Unassign Sites Wizard to remove a whole range of items from a site.

The main features of the Myridas Item Manager module are:

- The facility to copy item details to create a new item
- The facility to select an item as a template then clone selected information to create unlimited new items
- The facility to perform mass allocation or removal of items to or from a selection of sites

1. Copy Item Wizard



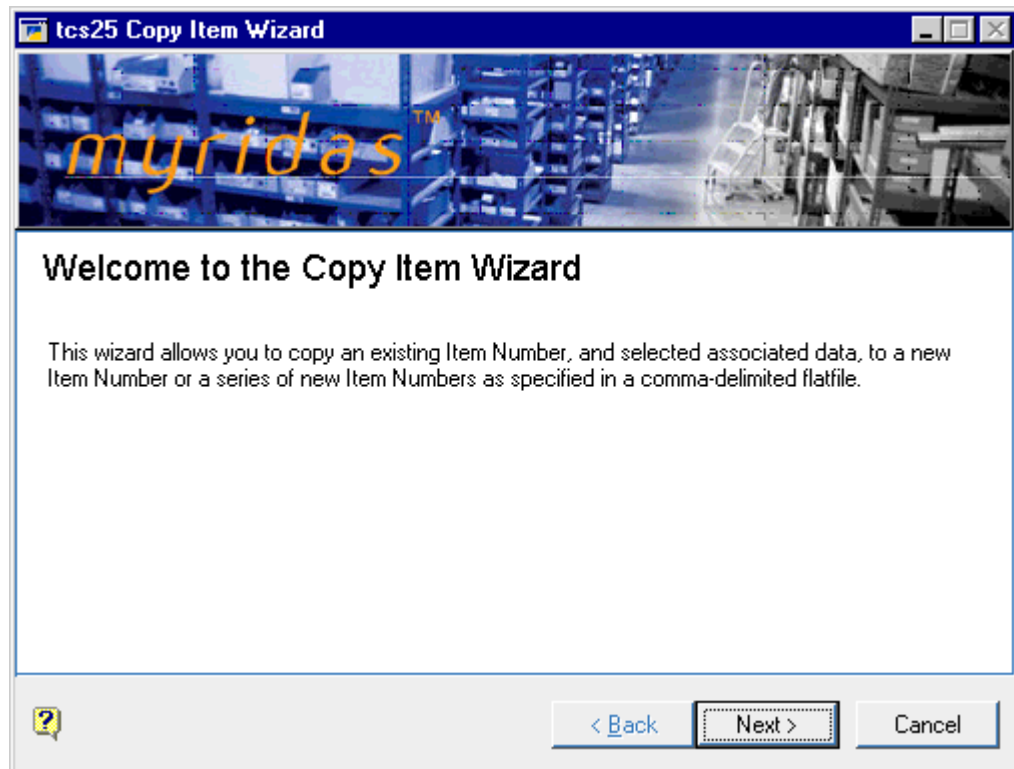
Routines >> Myridas Routines >> Item Manager >> Copy Item Wizard

The Myridas Copy Item Wizard allows the user to create single or multiple clones of a selected item.

Use the Copy Item Wizard to:

- Copy an existing Item Number and selected information to a new Item Number or range of Item Numbers

*The Copy
Item Wizard*



1.1 Using the Copy Item Wizard

1. Click the Next button to display the next window

Note that you can click Cancel on this or any other Copy Item Wizard screen to close the Copy Item Wizard.

Note also that you can click the Back button on this or any other Copy Item Wizard screen to return to the previous screen.

2. Copy From screen



Routines >> Myridas Routines >> Item Manager >> Copy Item Wizard

The Copy From screen

Item Number	100XLG
Description	Green Phone
Short Name	Phone

2.1 Using the Copy From screen

1. Enter the Item Number that you want to copy, or click the lookup to select an Item Number from the Items window. The Item Description and Short Description will be displayed below.
2. Click the Next button to display the next screen.

3. Copy Options screen



Routines >> Myridas Routines >> Item Manager >> Copy Item Wizard

The Copy Options screen

3.1 Using the Copy Options screen

1. Select the Item Number components that you want to copy. You can click on each component individually to select it, or click on the Mark All button to select all components. Click Unmark All to deselect all components.

Component Properties:

Maintenance Options	Copies information set up in the Great Plains Item Maintenance window
Item Note	Copies any notes made against items using the Item Note facility
Cost Details	Copies cost details set up in the Great Plains Item Maintenance window
Accounts	Copies information set up in the Great Plains Item Account Maintenance window
Site/Qtys	Copies information set up in the Great Plains Item Quantities Maintenance window
Price Lists (including currency details)	Copies information set up in the Great Plains Item Price List Maintenance window
Purchasing Options	Copies information set up in the Great Plains Item Purchasing Options Maintenance window
Vendors	Copies information set up in the Great Plains Item Creditors Maintenance window
Internet Information	Copies information set up in the Great Plains Internet Information window
Minimum Shelf Life	Copies information set up in the Great Plains Set Minimum Shelf Life window.
Catchweight Details	Copies catchweight information set up against items. Required Modules: Catchweights
Split Pack Details	Copies split pack details set up in the Split Pack/Maintain Stock Unit Maintenance window. Required Modules: Unit of Measure Management
Picking Details	Copies picking details set up using the Great Plains Advanced Picking module.
Additional Charge Details	Copies additional charge details set up using the Myridas Additional Charges module. Required Modules: Additional Charges
Item Load Details	Copies item load details set up using the Myridas Load Planning module. Required Modules: Load Planning Great Plains Advanced Distribution

Item Status Code Details	Copies item status code details set up using the Myridas Item Life Cycle module. Required Modules: Item Life Cycle
Catalogue Attributes	Copies catalogue attributes assigned to an Item Number using the Myridas Catalogue Based Sales module. Required Modules: Catalogue Based Sales
Catalogue Levels	Copies catalogue levels to which an Item Number has been assigned using the Myridas Catalogue Based Sales module. Required Modules: Catalogue Based Sales
Reorder Level Management Details	Copies reorder level management details assigned to an Item Number using the Myridas Reorder Level Management module. Required Modules: Reorder Level Management
Duty Processing Details	Copies duty processing details assigned to an Item Number using the Myridas Duty Processing module. Required Modules: Duty Processing
Retrospective Discount Details	Copies retrospective discount details assigned to an Item Number using the Myridas Retrospective Discounts module. Required Modules: Retrospective Discounts
Vendor Prices Details	Copies vendor price details assigned to an Item Number using the Myridas Vendor Price Management module. Required Modules: Vendor Price Management
Site Default Bins	Copies default bins details set for the item in the Great Plains Item Site Default Bins window.
Item Resource Planning	Copies item resource planning details set for the item in the Great Plains Item Resource Planning Maintenance window.
Other	This option allows you to customise the Item Copy to your own requirements. If you select "Other" then an SQL stored procedure (tcsINVSP00025_Customer_Specific) will be executed after all other details have been copied. Any required additional information can then be copied by adding the appropriate code to the stored procedure.

2. Click the Next button to display the next screen.

4. Copy To Source screen



Routines >> Myridas Routines >> Item Manager >> Copy Item Wizard

*The Copy To
Source
screen*

4.1 Using the Copy To Source screen

1. You can now select whether you want to enter a new Item Number manually or import multiple Item Numbers from an external flatfile.

Note that a flatfile could be created from, for example, an Excel spreadsheet.

*Sample
Flatfile*

100XLO	Orange Phone	Phone
100XLR	Red Phone	Phone
100XLP	Purple Phone	Phone

When creating a flatfile to import you should enter the three fields as shown in the example above. (The first column should contain the Item Number, the second column the Description and the third column the Short Description). Do not create a header field, as this will also be imported as a new item. The flatfile must be saved as a .csv or .txt file type.

2. Click on your selection then click the Next button. If you have selected to copy an Item Number manually then the Copy To screen will be displayed (see below). If you have selected to copy form an external flatfile then the Select Flatfile screen will be displayed.

5. Copy To screen



Routines >> Myridas Routines >> Item Manager >> Copy Item Wizard

*The Copy To
screen*

Item Number	100XLS
Description	Silver Phone
Short Description	Phone

Copy Original Description
 Use Original Short Description

5.1 Using the Copy To screen

1. Enter the Item Number, Description and Short Description for your new item.

Note that you can copy the Description and Short Description from the original item. To do this leave the Description and Short Description fields empty and ensure that the Copy Item Description and Use Original Short Description boxes are checked.

2. Click the Next button to display the next screen.

6. Single Item Copy Update screen



Routines >> Myridas Routines >> Item Manager >> Copy Item Wizard

*The Single
Item Copy
Update
screen*

tcs25 Copy Item Wizard


Completing the Copy Item Wizard

You have selected to copy the following Item Number:

100XLG	Green Phone
--------	-------------

To the following Item Number:

100XLS	Silver Phone
--------	--------------

 When you choose Finish, the Item Number will be copied.

< Back **Finish** Cancel

6.1 Using the Single Item Copy Update screen

1. Click Finish to copy the selected Item Number. The Item Number will be copied and the Copy Completed screen will be displayed.

7. Select Flatfile screen



Routines >> Myridas Routines >> Item Manager >> Copy Item Wizard

*The Select
Flatfile
screen*

tcs25 Copy Item Wizard

Item Copy - Select the Flatfile

Select the Flatfile that contains a comma-delimited list of Items Numbers that the selected Item Number is to be copied to:

Flatfile Name C:\TEMP\flatfile.csv

< Back **Next >** Cancel

7.1 Selecting a Flatfile

1. Enter the name and location of the flatfile you want to copy or click the browse button to select a file from your network.
2. Click next to display the next screen.

8. Flatfile Preview screen



Routines >> Myridas Routines >> Item Manager >> Copy Item Wizard

*The Flatfile
Preview
screen*

Include	Item Number	Item Description
<input checked="" type="checkbox"/>	100XLS	Silver Phone
<input checked="" type="checkbox"/>	100XGGO	Gold Phone
<input checked="" type="checkbox"/>	100XLT	Turquoise Phone

Number of Items Selected to Copy: 3
Number of Items with Errors: 0

Show All Item Numbers: [v] < Back Next > Cancel

8.1 Using the Flatfile Preview screen

1. All items to be copied from the selected flatfile will be displayed in the scrolling window.



Note that any errors will be displayed with a warning symbol. Items with errors will not be copied. If you require changes to be made to the flatfile you should do so in the relevant program, then re-import the flatfile into the Copy Item Wizard.

2. If you do not want a displayed Item Number to be included in the copy, click on the Include check box to unmark that item. The number of items selected to copy will be displayed below.
3. Click Next to display the next window.

9. Flatfile Update screen



Routines >> Myridas Routines >> Item Manager >> Copy Item Wizard

*The Flatfile
Update
screen*

tcs25 Copy Item Wizard

Completing the Copy Item Wizard

You have selected to copy the following Item Number:

100XLG	Green Phone
--------	-------------

To the following Item Number(s):

100XLS	Silver Phone
100XLGD	Gold Phone
100XLT	Turquoise Phone

When you choose Finish, the Item Number will be copied.

< Back Finish Cancel

9.1 Using the Flatfile Update screen

1. Click Finish to Copy the selected Item Number. The Item Numbers will be copied and the Copy Completed screen (see below) will be displayed.

10. Copy Completed screen



Routines >> Myridas Routines >> Item Manager >> Copy Item Wizard

*The Copy
Completed
screen*

tcs25 Copy Item Wizard

Copy completed

Select Cancel to exit the Wizard.
Select OK to return to the window specified below:

Return to 'Copy From' window

Return to 'Select Flatfile' window

Zoom to Item Maintenance OK Cancel

10.1 Using the Copy Completed screen

1. To view the copied item/items click the Zoom to Item Maintenance button. The Great Plains Item Maintenance window will be displayed. If a single item has been copied this will be displayed in the window.
2. You can now copy further Item Numbers. To copy from the same Item Number select the Return to 'Copy To' window option and click OK. To copy a different Item Number select the Return to 'Copy From' window option and click OK.
3. To close the Copy Item window click Cancel.

Assign/Unassign Sites Wizard

11. Assign/Unassign Sites Wizard



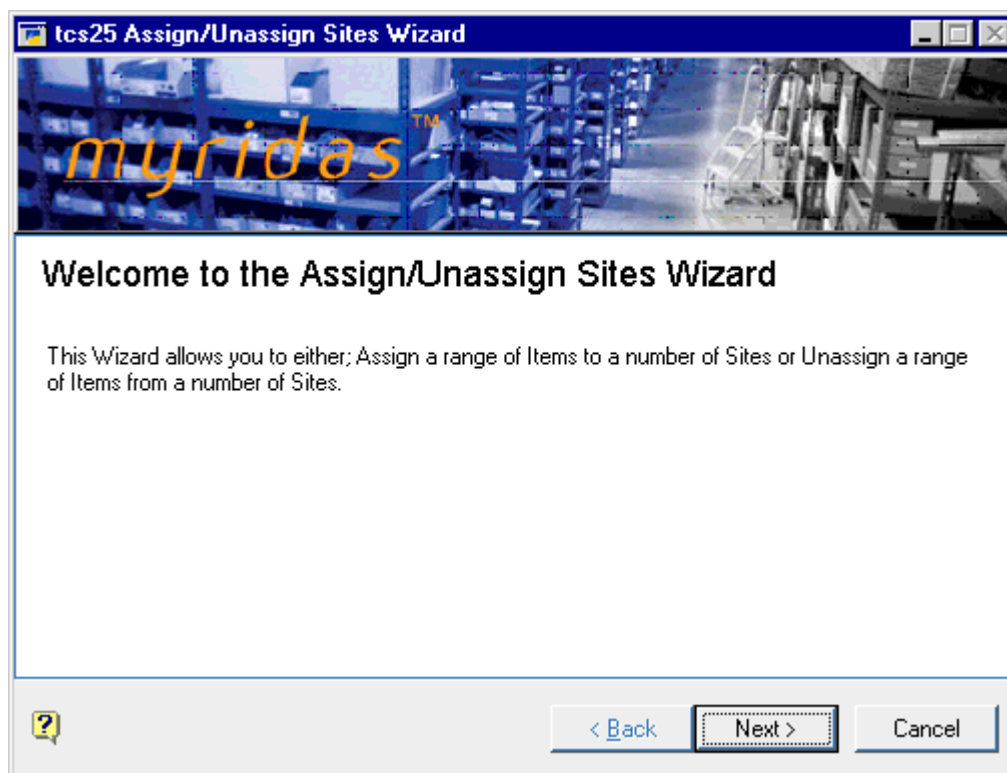
Routines >> Myridas Routines >> Item Manager >> Assign/Unassign Sites Wizard

The Myridas Assign/Unassign Sites Wizard allows the user to assign or unassign a range of items to or from a number of sites.

Use the Assign/Unassign Sites Wizard to:

- Assign a range of items to a site
- Unassign a range of items from a site

*The
Assign/Unassign
Sites Wizard*



11.1 Using the Assign/Unassign Sites Wizard

1. Click the Next button to display the next window

Note that you can click Cancel on this or any other Assign/Unassign Sites Wizard screen to close the Assign/Unassign Sites Wizard.

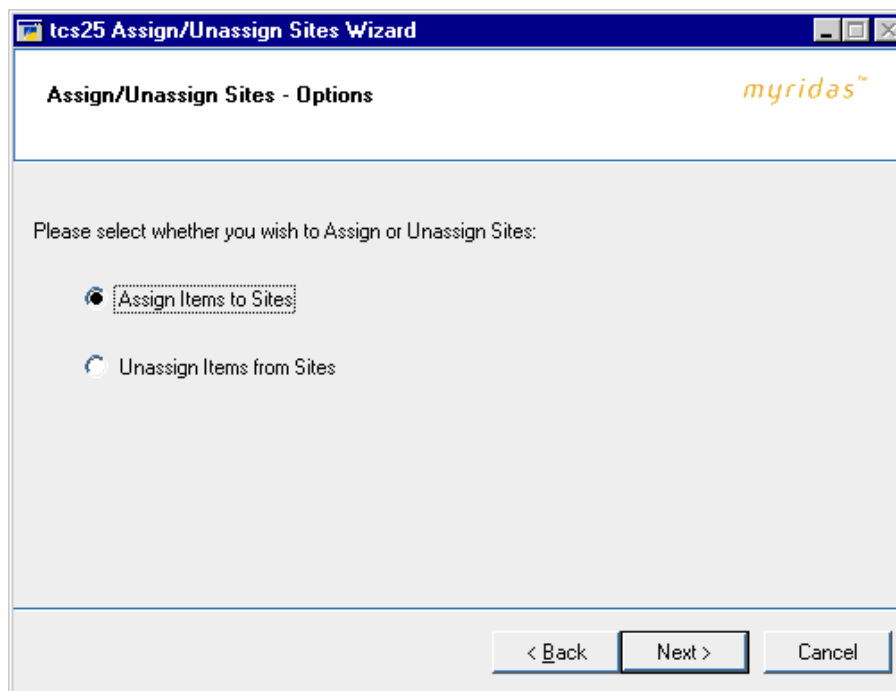
Note also that you can click the Back button whenever it is displayed to return to the previous screen.

12. Assign/Unassign Sites Wizard Options screen



Routines >> Myridas Routines >> Item Manager >> Assign/Unassign Sites Wizard

*The
Assign/Unassign
Wizard Options
screen*



12.1 Using the Assign/Unassign Sites Wizard Options screen

1. Click to select whether you want to Assign Items to Sites or Unassign Items from Sites. If you select to assign items to sites then the Assigning Item Range screen will be displayed. If you select to unassign items from a site then the Unassign Item Range screen will be displayed.
2. Click Next to display the next screen.

13. Assigning Item Range screen



Routines >> Myridas Routines >> Item Manager >> Assign/Unassign Sites Wizard

*The Assigning
Item Range
screen*

tcs25 Assign/Unassign Sites Wizard myridas™

Assign Items to Sites - Range Selection

Choose an Item range that you want to Assign Sites to:

Item Number From	100XLG	
Item Number To	100XLT	

Choose the Site(s) that you want the Items to be Assigned to:

Sites		
<input type="checkbox"/>	MANCHESTER	Manchester Warehouse
<input type="checkbox"/>	NORTH	North store
<input checked="" type="checkbox"/>	SOUTH	South store
<input type="checkbox"/>	WAREHOUSE	Main Site
<input type="checkbox"/>	WC1	Work Center 1
<input type="checkbox"/>	WC2	Work Center 2

Copy Primary Vendor from Default Site (if available)

13.1 Assigning an Item Range to a Site

1. Enter From and To values for the range of Item Numbers that you want to assign to sites, or click the lookup to select Item Numbers from the Items window.
2. Click to select the Sites that you want to assign the range of items to.
3. To copy the Primary Vendor to the Sites that you are assigning the items to, click the Copy Primary Vendor from Default Site (if available) check box. Where you have Primary Vendor details set up for an item, they will be copied to the sites that you are assigning to the item.
4. Click Next to display the next screen.

14. Assigning Items to Sites Preview screen



Routines >> Myridas Routines >> Item Manager >> Assign/Unassign Sites Wizard

The Assigning Items to Sites Preview screen

Site	Item Number	Description
SOUTH	100XLG	Green Phone
SOUTH	100XLGO	Gold Phone
SOUTH	100XLO	Orange Phone
SOUTH	100XLPA	Pastel Phone
SOUTH	100XLRA	Rainbow Phone
SOUTH	100XLS	Silver Phone
SOUTH	100XLT	Turquoise Phone

14.1 Previewing Items Assigned to Sites

1. The selected Sites and the range of Item Numbers that you have selected to be assigned to the Sites will be displayed in the scrolling window.
2. Click Next to display the next screen.



Note that if there are any exceptions, for example, where a selected Item Number is already assigned to a selected Site, then these will be displayed on the Exceptions screen. You can click Next to continue, Back to go back and amend your selection, or print out a list of the exceptions.

The Exceptions screen

Site	Item Number	Description
MANCHESTER	100XLG	Green Phone
Phone		Item Number is already assigned
MANCHESTER	100XLGO	Gold Phone
Phone		Item Number is already assigned
MANCHESTER	100XLS	Silver Phone
Phone		Item Number is already assigned
MANCHESTER	100XLT	Turquoise Phone
Phone		Item Number is already assigned

15. Assigning Items Update screen



Routines >> Myridas Routines >> Item Manager >> Assign/Unassign Sites Wizard

The Assigning Items Updates screen

Site	Description
SOUTH	South store

When you choose Finish, the Update will commence.

< Back Finish Cancel

15.1 Viewing Items to be Assigned

1. The range of Item Numbers that you have selected will be specified and the Sites to which they will be assigned will be displayed in the scrolling window.
2. Click Finish to assign the selected Item Numbers to the Sites you have selected. When the update is complete an Update Complete message will be displayed. You will be asked whether you want to assign Sites to more Item Numbers. Click Yes to display the Assigning Item Range screen, click No to close the Assign/Unassign Sites Wizard.

16. Unassign Item Range screen



Routines >> Myridas Routines >> Item Manager >> Assign/Unassign Sites Wizard

*The Unassign
Item Range
screen*

tcs25 Assign/Unassign Sites Wizard

Unassign Items to Sites - Range Selection myridas™

Choose an Item range that you want to Unassign Sites from:

Item Number From: 100XLG

Item Number To: 100XLT

Choose the Site(s) that you want the Items to be Unassigned from:

Sites		
<input type="checkbox"/>	MANCHESTER	Manchester Warehouse
<input type="checkbox"/>	NORTH	North store
<input checked="" type="checkbox"/>	SOUTH	South store
<input type="checkbox"/>	WAREHOUSE	Main Site
<input type="checkbox"/>	WC1	Work Center 1
<input type="checkbox"/>	WC2	Work Center 2

< Back Next > Cancel

16.1 Unassigning an Item Range

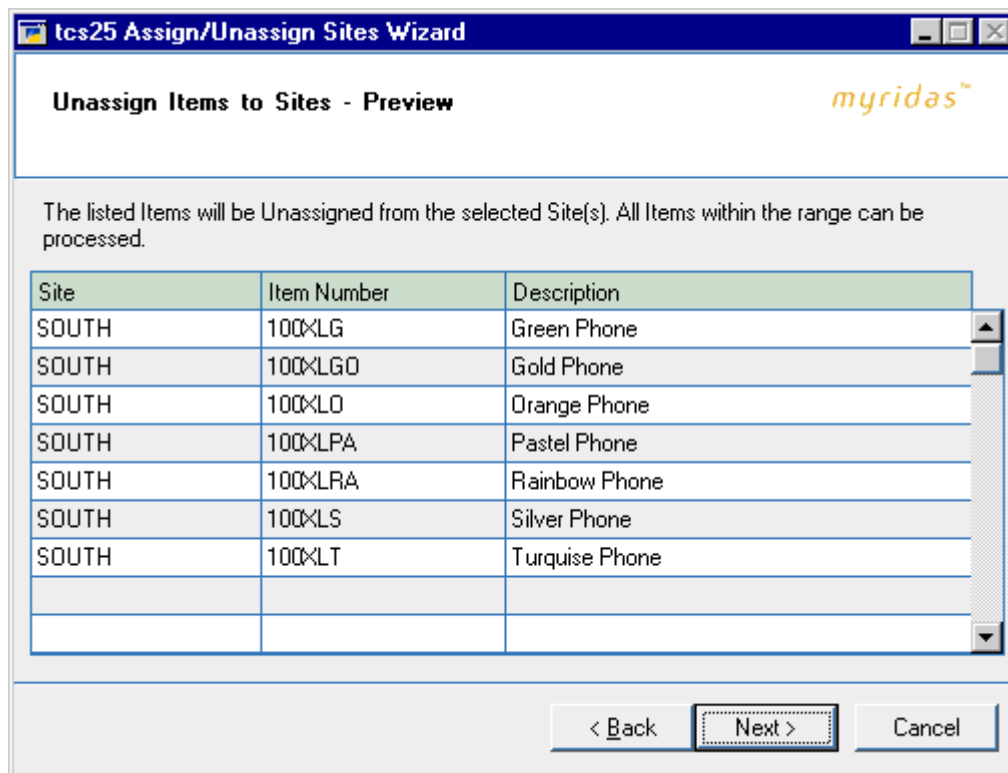
1. Enter From and To values for the range of Item Numbers that you want to unassign from sites, or click the lookup to select Item Numbers from the Items window.
2. Click to select the Sites that you want to unassign the range of items from.
3. Click Next to display the next screen.

17. Unassigning Items from Sites Preview screen



Routines >> Myridas Routines >> Item Manager >> Assign/Unassign Sites Wizard

*The Unassigning
Items from Sites
Preview screen*



17.1 Previewing Unassigned Items

1. The selected Sites and the range of Item Numbers that you have selected to be unassigned from the Sites will be displayed in the scrolling window.
2. Click Next to display the next screen.



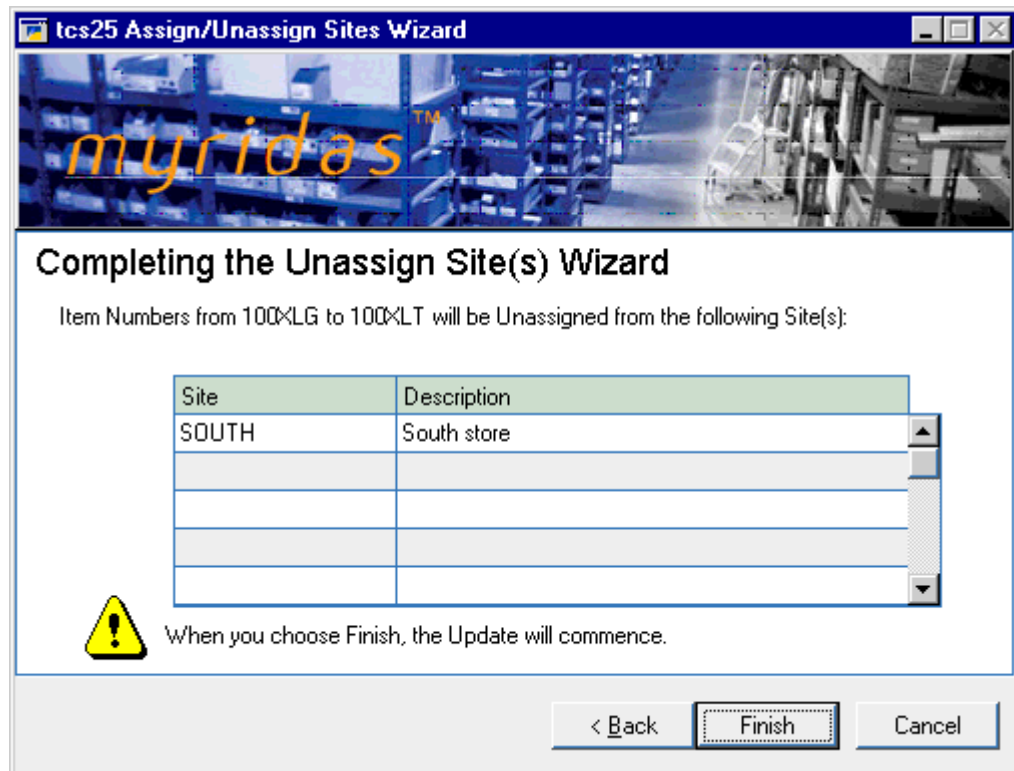
Note that if there are any exceptions, for example, where a selected Item Number is not assigned to a selected Site, then these will be displayed on the Exceptions screen. You can click Next to continue, Back to go back and amend your selection, or print out a list of the exceptions.

18. Unassigning Items Update screen



Routines >> Myridas Routines >> Item Manager >> Assign/Unassign Sites Wizard

*The Unassigning
Items Update
screen*





18.1 Viewing Items to be Unassigned

1. The range of Item Numbers that you have selected will be specified and the Sites from which they will be unassigned will be displayed in the scrolling window.
2. Click Finish to unassign the selected Item Numbers from the Sites you have selected. When the update is complete an Update Complete message will be displayed. You will be asked whether you want to unassign Sites from more Item Numbers. Click Yes to display the Unassign Item Range screen, click No to close the Assign/Unassign Sites Wizard.

Appendix A

Access to Myridas Windows

Item Manager

Window Name	 Menu Access	 Other Access
Copy Item Wizard	Routines >> Myridas Routines >> Item Manager >> Copy Item Wizard	
Assign/Unassign Sites Wizard	Routines >> Myridas Routines >> Item Manager >> Assign/Unassign Sites Wizard	

Appendix B

Myridas Reports

Myridas provides multiple reports to increase information visibility.

Report Name	Module	Functionality
Copy Errors report	Item Manager	Prints all errors encountered when preparing to copy items
Flatfile Preview report	Item Manager	Prints a preview of items selected to be copied from a flatfile

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