

# *myridas*<sup>TM</sup> *User Guide*

Version 7.6 for Great Plains 7.5

## **Unit of Measure Management**



Trinity Computer Services Limited

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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 Unit of Measure Management module:

- Unit of Measure Management



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>.

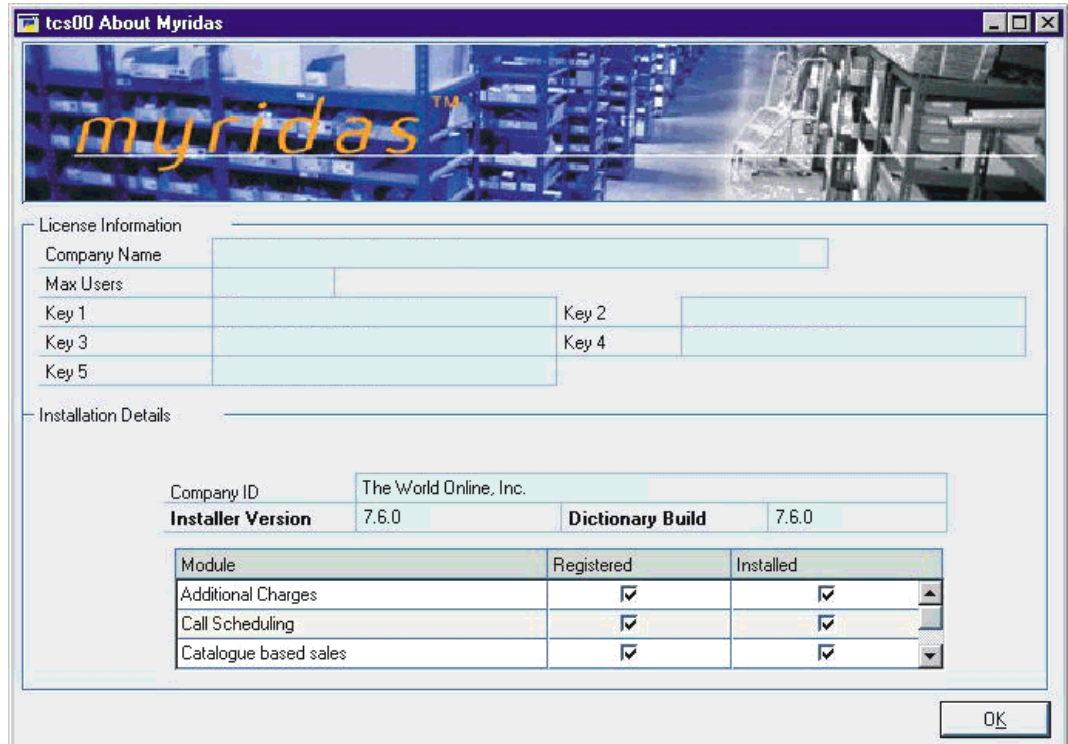
## About Myridas



*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*



## Unit of Measure Management

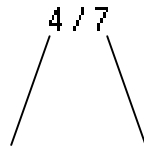
The Myridas Unit of Measure Management module provides the facility to specify items as “split pack” items. You may, for example, distribute bottles of wine by the bottle or by the case. The Myridas split pack format allows you to view the number of full cases and the number of additional bottles simultaneously.

In addition the Unit of Measure Management module allows you to view inventory balances in alternate units, not just the base unit, in a number of windows.

The main features of the Unit of Measure Management module are:

- The facility to specify items as split pack items
- The facility to specify a main stock unit for items
- The facility to perform stock counts on items in the split pack format
- The facility to view items in main stock units or split pack format in a range of Great Plains and Myridas windows

*The Myridas  
Split Pack  
Format*



number of main units (e.g.: cases)

number of split units (e.g.: bottles)

The Myridas Split Pack format allows the user to instantly evaluate item quantities, and provides greater controls over item quantity management.

With the Myridas Unit of Measure Management module, multiple windows are given the functionality to display item quantities in the split pack format, as shown below.

*Additional  
Windows  
with Split  
Pack Format  
Functionality*

Additional Windows with Split Pack Format Functionality
Great Plains Item Lookup window
Great Plains Stock Card window
Great Plains Available to Promise window
Myridas Item Quantities Locations window
Myridas Stock Count Entry window

## 1. Split Pack/Main Stock Unit Maintenance window



*Cards >> Myridas Cards >> U of M Management >> Split Pack MSU Maint.*

Use the Split Pack/Main Stock Unit Maintenance window to:

- Set up items and unit of measure schedules as split packs
- Specify the Main Stock Unit for items and unit of measure schedules

*The Split Pack/Main Selling Unit Maintenance window*

Note that this window is also available as an Extras option from the Great Plains Item Maintenance window.

### 1.1 Setting Up Split Packs and Specifying Main Stock Units

#### To set up split packs and specify Main Stock Units in the Split Pack/Main Stock Unit Maintenance window:

1. Click on either Item or U of M Schedule. This will decide whether selections you make in the window apply to a specified item or to a Unit of Measure schedule.

Making the selections against a Unit of Measure schedule may be useful, for example, if you want to apply parameters to a range of items based on their shared Unit of Measure schedule.

2. Dependant on the selection made in step 1, enter either an Item Number or a Unit of Measure schedule, or use the lookup to select from the relevant lookup window.

The description of your selection will be displayed below. If you selected Item in step 1 then the U of M Schedule for the selected Item Number will also be displayed.

3. From the drop-down list select the Unit of Measure that you want to be the Main Stock Unit for the item or Unit of Measure schedule. The drop-down list

is item specific and only contains units of measure held within the item Unit of Measure schedule.

The Main Stock Unit is the Unit of Measure that will be most commonly used for viewing stock balances and transactions.

4. From the drop-down list select the Unit of Measure you want to be the sales consolidation unit.
5. If you want to specify your selected item, or items contained in the Unit of Measure schedule as split pack items, click the split pack indicator box.
6. Click Save to apply your selection

*Deleting  
selected  
parameters*

You can delete parameters set in the Split Pack/Main Stock Unit Maintenance window by clicking the Delete button.

Note that you can clear a selection at any point by clicking the Clear button.

## 2. Unit of Measure Management Setup window



*Cards >> Myridas Setup >> Unit of Measure Management >> Unit of Measure Management Setup*

Use the Unit of Measure Management Setup window to:

- Specify the default units in which items will be displayed in the named enquiry windows

*The Unit of  
Measure  
Management  
Setup  
window*



### 2.1 Specifying Default Units for Windows

**To specify default units for windows in the Unit of Measure Management Setup window:**

1. For each named enquiry window you are given the option to select the Default Units in which items will be initially displayed. For example, if you want to always view items in the Item Lookup window in their Default Selling Unit of Measure, then click Default Selling Unit in the Item Lookup row.
2. Click OK to invoke the parameters that you have set.



### 3.1 Entering Stock Counts for Split Pack items

#### **To enter stock counts for split pack items in the Myridas Stock Count Unit of Measure Entry window:**

1. Open the Stock Count Entry window.  
(Transactions >> Inventory >> Stock Count Entry)
2. Enter or select the stock count ID.
3. In the scrolling window, select the item-site combination you want to enter results for.
4. Choose the Counted Qty. expansion button to open the Myridas Stock Count Unit of Measure Entry window.

Note that you must have clicked onto the Counted Qty. scrolling window to activate the expansion button.

5. Enter or select a Unit of Measure for the results, and then enter the counted quantity for that Unit of Measure.

The available fields for entering counted quantities will be dependent upon the Unit of Measure that you select. For example, Units of Measure for bottles of wine could be Cases (Main units) and Bottles (Split Pack units). If you choose to enter the counted quantities in Cases, then you can enter the number of Cases and the number of Bottles in the split pack format. For example, 3/2 would be three Cases plus two Bottles. If you choose to enter in Bottles then the first numerical field of the split pack format (i.e.: the Split Pack field) will be disabled so that you may only enter Bottles quantities.

Note that if a case holds ten bottles, then the highest figure that could be entered into the second field would be 9.

6. Repeat step 5 until you've entered all count results for the item-site combination. As you move off each line, the extended quantity—the equivalent in the base unit of measure, according to the assigned unit of measure schedule—is calculated and displayed.
7. Choose OK to close the Stock Count Unit of Measure Entry window.

The counted quantity and variance quantity are updated automatically in the Stock Count Entry scrolling window.

8. Repeat steps 3 to 7 until all necessary stock count results have been entered.
9. Process or Save the stock count, following standard Great Plains behaviour.

## 4. Item Quantities Locations window



*Enquiry >> Myridas Enquiries >> U of M Management >> Item Qty's Locations*

Use the Item Quantities Locations window to:

- View item location and quantity details

*The Item Qty's Locations window*

Note that this window is also available as an Extras option from the Great Plains Item Quantities Maintenance window.

### 4.1 Viewing Item Location and Quantities Details

**To view item location and quantity details in the Item Quantities Locations window:**

1. Enter an Item Number or click the lookup to select an Item Number from the Items lookup window.
2. Select a Unit of Measure from the U of M drop-down list.
3. The Sites parameters are set by default to view All. To select a specific Site ID click Site ID then use the Browse buttons or click the lookup to select a site for the Item Quantities by Site lookup window.

Note that items will be displayed in the default unit set in the [Unit of Measure Management Setup window](#), though you can still use the Unit of Measure drop-down list to view in an alternative unit of measure.

4. All relevant details for your selection will be displayed. When you have viewed the information click OK to close the window.

Note that if you have access to the Great Plains Available to Promise module then you can view the selected item site combination in the Available to Promise window. Click the Avail To Prom button to display the window. If you do not have access to the Great Plains Available to Promise module then the button will be disabled.

## 5. Split Pack Reports



Many Great Plains reports have been given additional functionality by the Myridas Unit of Measure Management module to display items in reports in the split pack format.

Split Pack Format Compatible Reports:
Inventory Stock Status Report
Inventory Stock Status by Site Report
Historical Stock Status Detail by Account
Historical Stock Status Detail by Item
Historical Stock Status Detail by Site
Historical Stock Status Summary by Account
Historical Stock Status Summary by Item
Historical Stock Status Summary by Site
Physical Inventory Checklist Report
Physical Inventory Checklist by Site Report
Physical Inventory Checklist by Site No Quantity Report
Physical Inventory Checklist No Quantity Report
Stock Count Forms by Item Report
Stock Count Forms by Item Break Report
Stock Count Forms by Site Report
Stock Count Forms by Site Break Report
Stock Count List Report
Vendor Activity Report
Vendor Activity by Vendor Report

## Appendix A

### Access to Myridas Windows

#### Unit of Measure Management

Window Name	 Menu Access	 Other Access
Split Pack/Main Stock Unit Maintenance	Cards >> Myridas Cards >> U of M Management >> Split Pack MSU Maint	Cards >> Inventory >> Item >> Item Maintenance window >> Extras >> U of M Management Maintenance
Unit of Measure Management Setup	Cards >> Myridas Setup >> U of M Management >> U of M Management Setup	
Stock Count Unit of Measure Entry	Transactions >> Inventory >> Stock Count Entry >> In the Stock Count Entry window, enter a counted quantity for an item and choose the Counted Qty Expansion button	
Item Quantities Locations	Enquiry >> Myridas Enquiries >> U of M Management >> Item Qtys Locations	Cards >> Inventory >>Quantities/Sites >> Extras >> Item Qty Locs

## Appendix B

### Modified Great Plains Windows

Some Great Plains windows have been modified to incorporate Myridas behaviour:

<b>Great Plains Window Name</b>	<b>Series</b>	<b>Myridas Module</b>	<b>Modification</b>
Inventory Activity Reports	Inventory	Unit of Measure Management	Runs versions of reports which show split pack items in split pack format
Items	Inventory	Unit of Measure Management	<p>Will display split pack items in the Split Pack format</p> <p>Unit Selection field allows you to select a display Unit of Measure</p> <p>This modification will only be available if the Great Plains Advanced Distribution module is also installed</p>

## Appendix C

### Myridas Reports

Myridas provides multiple reports to increase information visibility.

Multiple reports have been enhanced for the Unit of Measure Management module.

See [Split Pack Reports](#) for further details.

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