

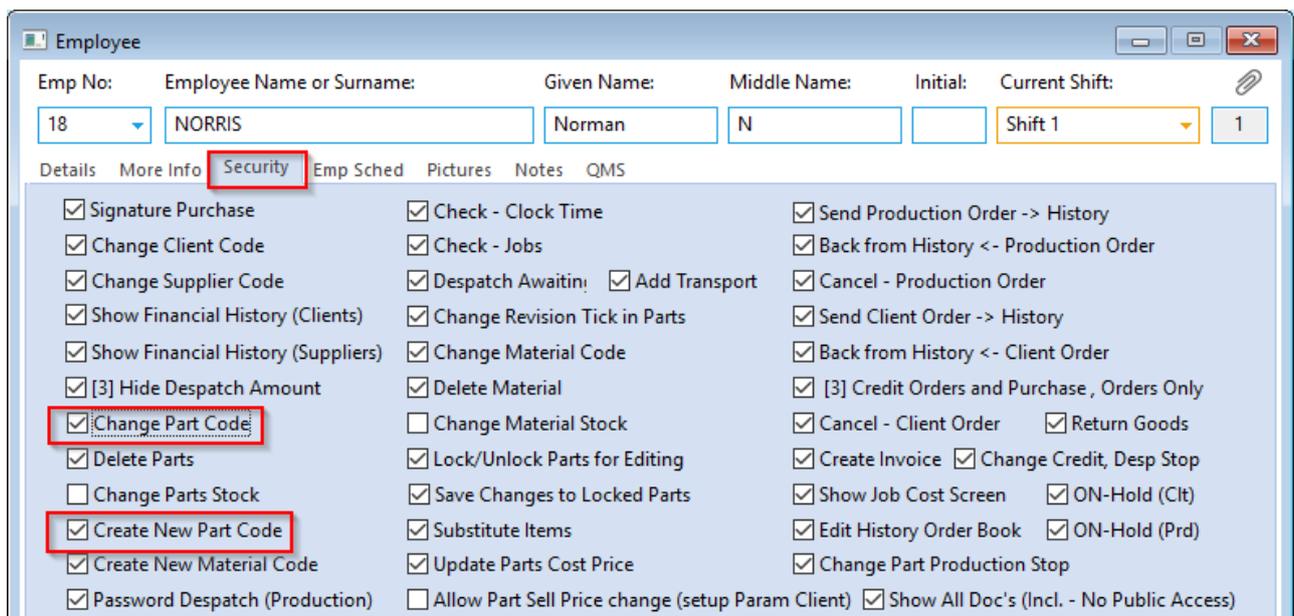
Renaming Part Codes

Overview:

This document describes how to rename part codes in iTMS. Part codes may need to be renamed due to Management requests, changes to a supplier, codes entered incorrectly, etc. To be able to utilise this function the user will need to have set-up permission and an internal password. To set-up the permissions the user will need access to the 'Employee Details' window and especially the 'Security' tab of that window. If renaming multiple parts a query will have to be run and saved prior to utilising this feature. For information on Queries, please see *Initiate and Run a Query* within the ITMS Help Files.

Set Permission and Internal Password

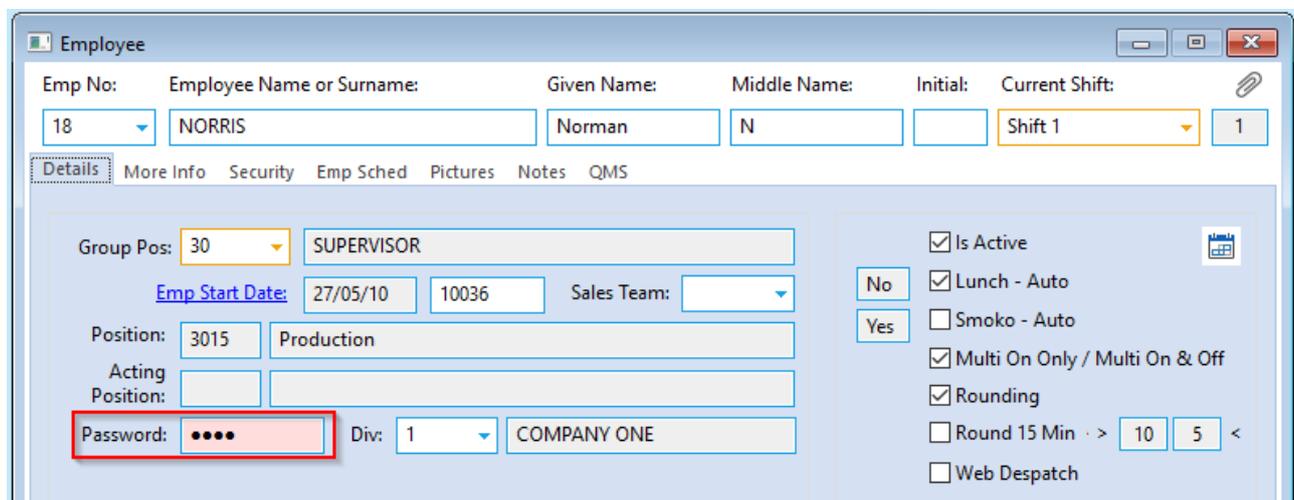
From the OPTO ribbon, select the 'Resources' tab and **click** on the 'New/Edit Employee' icon to open the 'Employee Details' window. In the **Emp No** field enter the required employee number or **press <F2>** and select the employee from the pop-up list and **click OK**. **Press <TAB>** to generate the employee details then **click** on the 'Security' tab to edit permissions. **Click** in the **Change Part Code** and **Create New Part Code** tick boxes (circled below) to assign permission to this employee.



The screenshot shows the 'Employee' window with the 'Security' tab selected. The 'Emp No' is 18, 'Employee Name or Surname' is NORRIS, 'Given Name' is Norman, and 'Middle Name' is N. The 'Current Shift' is Shift 1. The 'Security' tab contains a grid of checkboxes for various permissions. The 'Change Part Code' and 'Create New Part Code' checkboxes are circled in red.

Permission	Checked
Signature Purchase	<input checked="" type="checkbox"/>
Change Client Code	<input checked="" type="checkbox"/>
Change Supplier Code	<input checked="" type="checkbox"/>
Show Financial History (Clients)	<input checked="" type="checkbox"/>
Show Financial History (Suppliers)	<input checked="" type="checkbox"/>
[3] Hide Despatch Amount	<input checked="" type="checkbox"/>
Change Part Code	<input checked="" type="checkbox"/>
Delete Parts	<input checked="" type="checkbox"/>
Change Parts Stock	<input type="checkbox"/>
Create New Part Code	<input checked="" type="checkbox"/>
Create New Material Code	<input checked="" type="checkbox"/>
Password Despatch (Production)	<input checked="" type="checkbox"/>
Check - Clock Time	<input checked="" type="checkbox"/>
Check - Jobs	<input checked="" type="checkbox"/>
Despatch Awaitin; Add Transport	<input checked="" type="checkbox"/>
Change Revision Tick in Parts	<input checked="" type="checkbox"/>
Change Material Code	<input checked="" type="checkbox"/>
Delete Material	<input checked="" type="checkbox"/>
Change Material Stock	<input type="checkbox"/>
Lock/Unlock Parts for Editing	<input checked="" type="checkbox"/>
Save Changes to Locked Parts	<input checked="" type="checkbox"/>
Substitute Items	<input checked="" type="checkbox"/>
Update Parts Cost Price	<input checked="" type="checkbox"/>
Allow Part Sell Price change (setup Param Client)	<input type="checkbox"/>
Send Production Order -> History	<input checked="" type="checkbox"/>
Back from History <- Production Order	<input checked="" type="checkbox"/>
Cancel - Production Order	<input checked="" type="checkbox"/>
Send Client Order -> History	<input checked="" type="checkbox"/>
Back from History <- Client Order	<input checked="" type="checkbox"/>
[3] Credit Orders and Purchase, Orders Only	<input checked="" type="checkbox"/>
Cancel - Client Order	<input checked="" type="checkbox"/>
Return Goods	<input checked="" type="checkbox"/>
Create Invoice	<input checked="" type="checkbox"/>
Change Credit, Desp Stop	<input checked="" type="checkbox"/>
Show Job Cost Screen	<input checked="" type="checkbox"/>
ON-Hold (Clt)	<input checked="" type="checkbox"/>
Edit History Order Book	<input checked="" type="checkbox"/>
ON-Hold (Prd)	<input checked="" type="checkbox"/>
Change Part Production Stop	<input checked="" type="checkbox"/>
Show All Doc's (Incl. - No Public Access)	<input checked="" type="checkbox"/>

Click on the 'Details' tab and enter a password in the red field (Circled below). This password is different from the password used to log-on to OPTO and may be like a PIN number. For this example, employee 18-Norman Norris has been given a password of 1818.



The screenshot shows the 'Employee' window with the 'Details' tab selected. The 'Group Pos' is 30 (SUPERVISOR), 'Emp Start Date' is 27/05/10, 'Position' is 3015 (Production), and 'Div' is 1 (COMPANY ONE). The 'Password' field is circled in red.

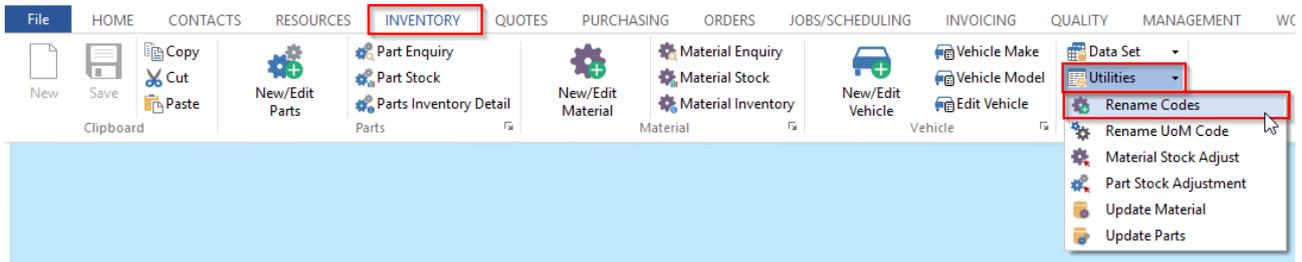
Field	Value
Group Pos	30 SUPERVISOR
Emp Start Date	27/05/10 10036
Position	3015 Production
Acting Position	
Password	••••
Div	1 COMPANY ONE

Press <F9> to save and continue.

To Rename Part Codes

NOTE: The Manufacturing module must be open to access the Soft-key menu for the Manufacturing features.

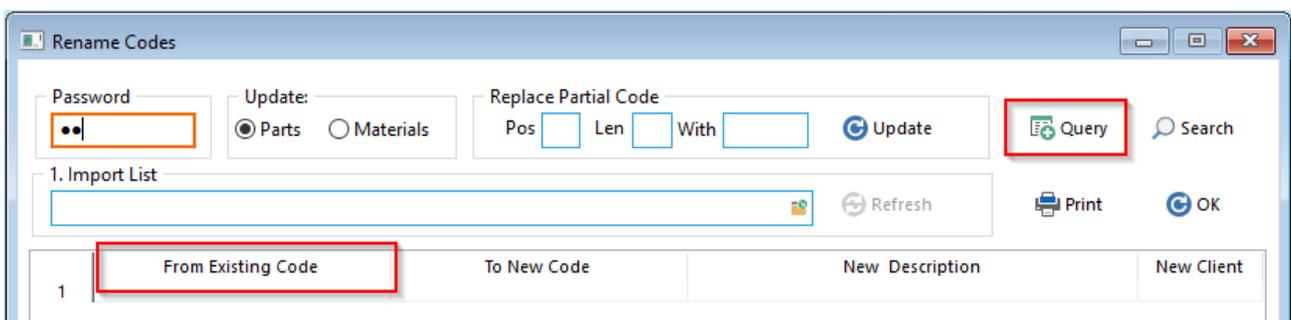
From the OPTO ribbon, select the 'Inventory' tab and **click** on the 'Utilities' drop menu then select the 'Rename Codes' option from the list to open the 'Rename Codes' window.



Enter your internal password and **press <TAB>** - Ensure the **Part** radio button is active.

There are 2 Methods to Rename the Part Codes: –

- 1. To Rename a Single Part Code** - **Click** in the **From Existing Code** column, type in an existing code, **press <TAB>** and select the parts to be re-named from the pop-up list and then **click OK**. **Click** in the 'To New Code' field, **press <F3>** back space and type in new code, and then **click** on the **OK** button to run the re-naming process.



- 2. To Rename Multiple (Partial) Part Codes** - **Click** on the **Query** button and select from the previously save queries in the 'Saved Query' window and **click OK**.

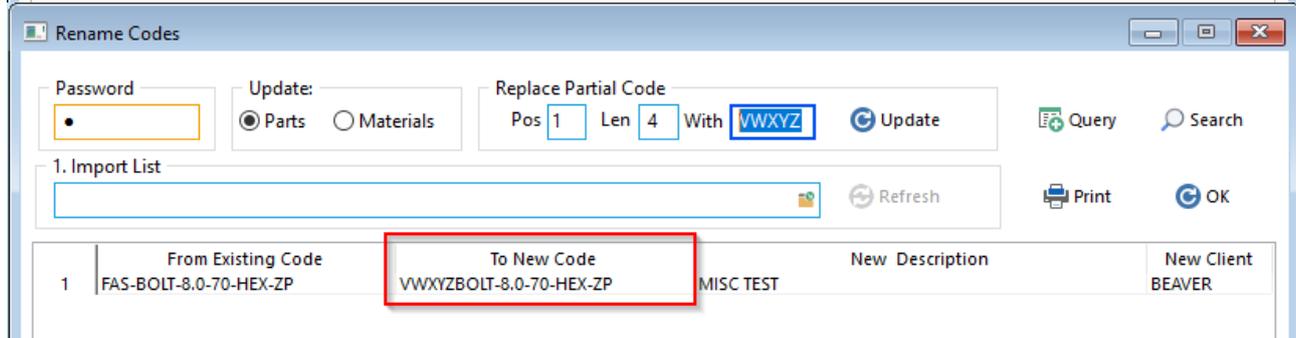
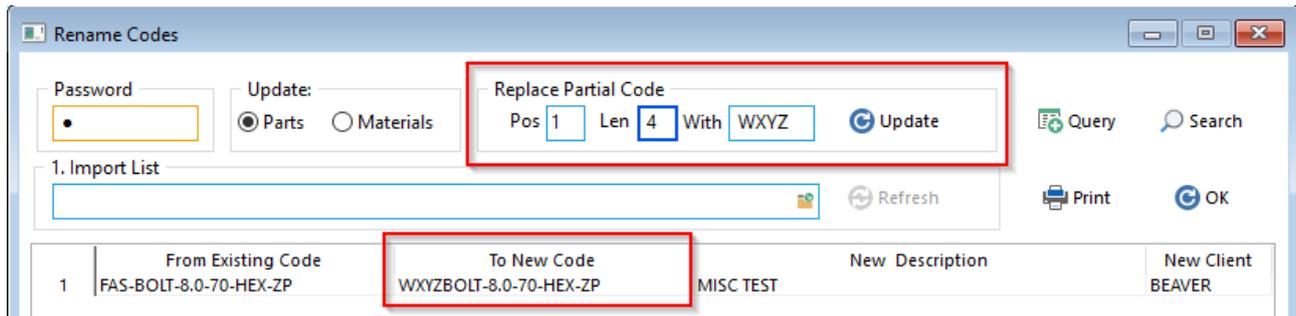
Pos – This defines the starting position of the change to the code.

Len - This defines the total characters in the code to change.

With - This defines the character that will replace the existing code.

For this example we will change the prefix PART to VWXYZ for each part. Enter the changes and **click** on the 'Update' button. The user can edit the part as many times as they like using only the 'Update' button.

NOTE: DO NOT click on the OK button until the user is absolutely satisfied with the changes.



Only when the user is completely satisfied with the change then **click** on the 'OK' button to run the final renaming of the parts code process (see below), close the 'Rename Codes' window when finished.

