

Rename Material Codes

Overview:

This document describes how to rename material codes in OPTO. Material 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 permission and an internal employee password.

To Set-Up the Permissions

From the OPTO ribbon, select the 'Resources' tab and **click** on the 'New/Edit Employee' icon to pen the 'Employee Details' window. **Click** in the **Emp No** field type in the required employee number or **press <F2>** and select the employee from the pop-up list and **click OK**. **Press <TAB>** to display the details for the employee, **click** on the 'Security' tab to open and **click** in the required boxes (circled below) to tick.

The screenshot shows the 'Employee' window with the 'Security' tab selected. The 'Emp No' is 2, 'Employee Name or Surname' is Moreton, 'Given Name' is Larry, 'Middle Name' is T, and 'Current Shift' is Shift 1. The 'Security' tab contains a grid of checkboxes for various permissions. Two checkboxes are circled in red: 'Change Material Code' and 'Create New Material Code'.

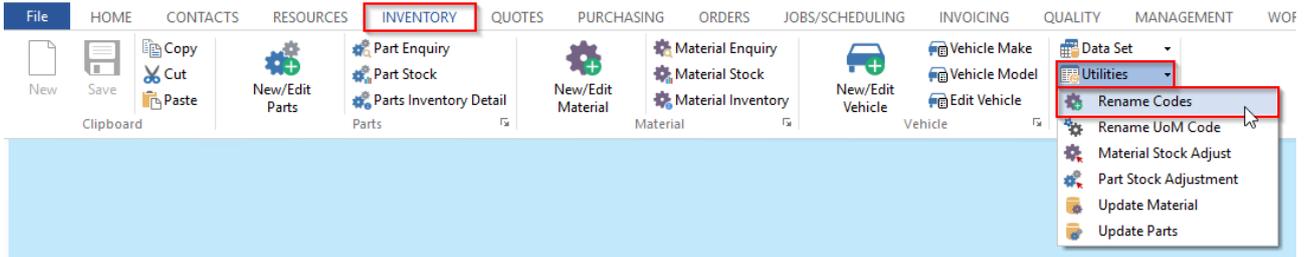
Click on the 'Details' tab and create an internal employee password by typing in the **Password** field (circled below). This password is different from the password used to log-on to iTMS and must be unique to that employee.

The screenshot shows the 'Employee' window with the 'Details' tab selected. The 'Group Pos' is 30 (SUPERVISOR), 'Emp Start Date' is 05/04/10, 'Position' is 3510 (Supervisor Fabrication), and 'Div' is 0001. The 'Password' field is circled in red and contains four dots. The 'Is Active' checkbox is checked, and there are options for 'Lunch - Auto', 'Smoko - Auto', 'Multi On Only / Multi On & Off', 'Rounding', 'Round 15 Min', and 'Web Despatch'.

Press <F9> to save and continue.

To Rename Material Codes

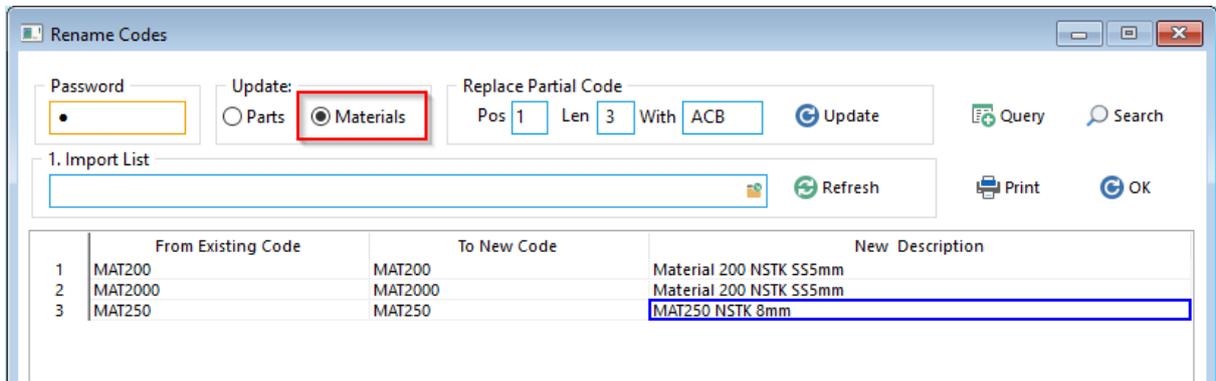
From the OPTO ribbon, select the 'Inventory' tab and **click** on the 'Utilities' drop menu then select the 'Rename Codes' option from the list to open the 'Rename Codes' window.



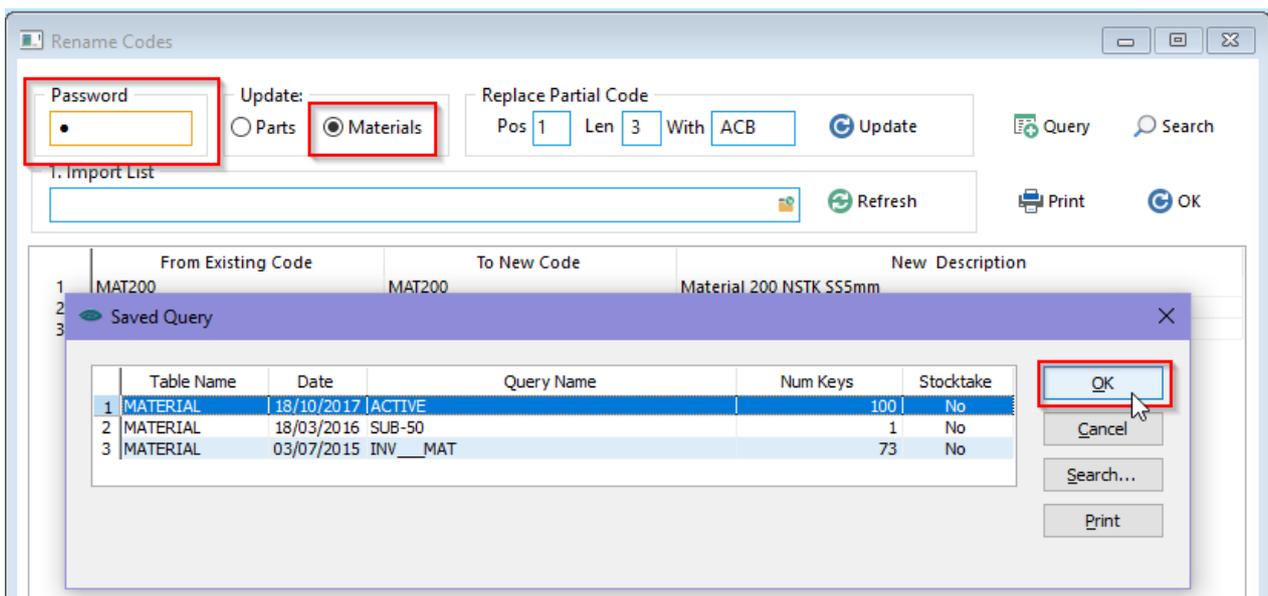
There are 2 methods to rename the material codes –

In the 'Rename Codes' window, enter your employee password and **click** on the **Material** radio button.

1. **To Rename a Single Material Code** – Ensure the **Materials** radio button (circled below) is selected. **Click** in the **From Existing Code** column, type in an existing code, **press <TAB>** and select the materials to be renamed from the pop-up list and then **click OK**. **Press <TAB>** to move to the **To New Code** field, type in the new code, **press <TAB>** to move to the **New Description** field and enter a new description if required. **Click** on the **OK** button to run the renaming.



2. **To Rename Multiple (Partial) Material Codes** - **Click** on the 'Query' button and select the required saved query and **click OK**.

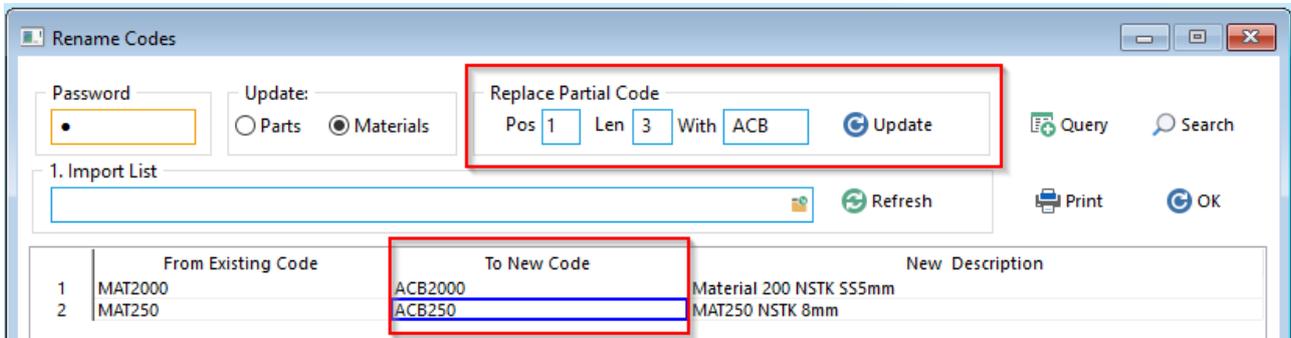


Enter the required data in to the 'Replace Partial Code' fields: -

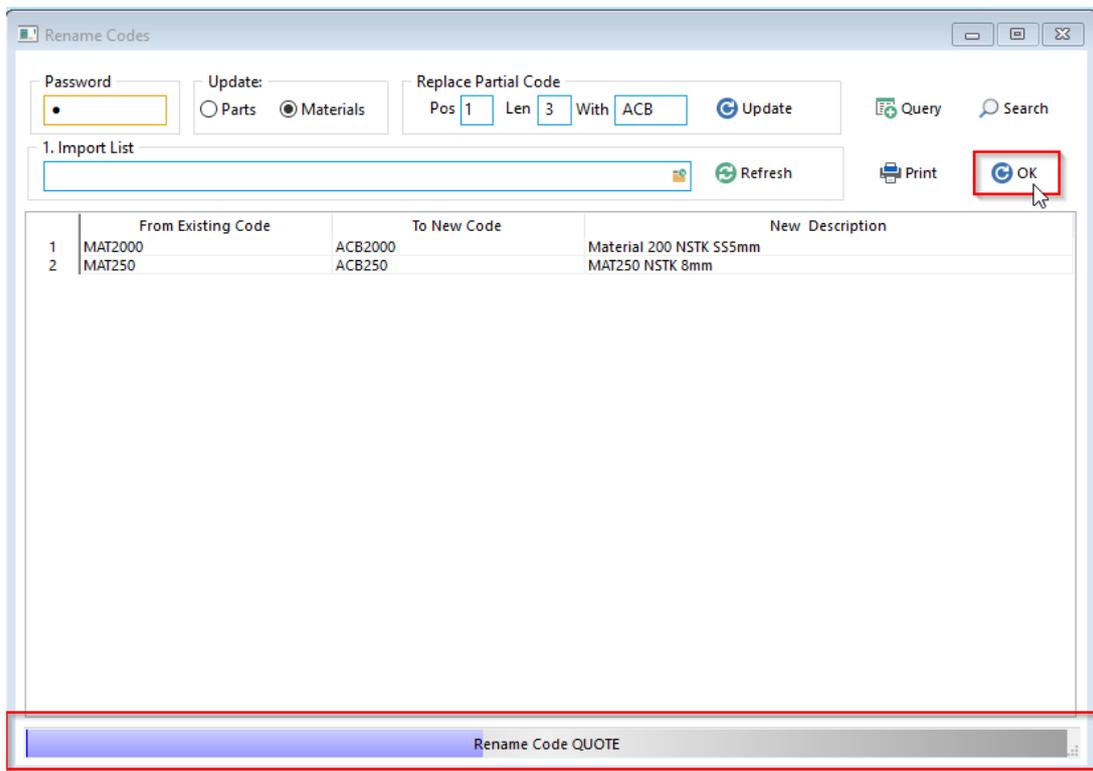
Pos – Defines the starting position in the string to change.

Len – Defines the length of the string to change.

With – Defines the new characters.



Click on the 'Update' button, if the new codes are not suitable, you can edit by repeating the process or close the window to cancel. **Click** the 'OK' button to run the renaming of material codes when satisfied (see below),



The Re-naming process is now complete, close the window when finished.