DDMS®: Loading OPUS OPdb Multi-Vendor Quarterly Updates

Updated August 2023

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Introduction

Your inventory database is probably the largest and one of the most important databases. Choosing the right wholesale item file is one of the most important decisions you can make. In selecting Office Products Update Services Inc., you've chosen one of the largest multiple file service companies in the business with over 800 satisfied customers.

OPUS® has long been known as a reliable, reputable, and experienced company — one which provides dependable service and state-of-the-art technology. OPUS offers an electronic inventory database that lets you create an item file with information for multiple wholesalers. Files are easily updated using the OPUS item load.

Loading your item files is now easier than ever using the OPUS load program SIMPLE (Smart Inventory Maintenance Plan Limit and Execute). This Windows-based wizard efficiently walks you through loading your inventory files. With the OPUS SIMPLE program, you can quickly load your update using last quarter's parameter settings or change selected settings for the standard catalog update.

Reviewing the Update Checklist

Before creating or updating your inventory files, there are several maintenance tasks you should complete. These procedures clean up files and reduce hard disk space used. This prevents problems and ensures your system functions properly. After loading the file, there are a few additional steps to complete.

Pre-Load OPUS Update Checklist

Before you load the OPUS database file, perform the following steps:

- Compress the files used in the OPUS item update several days to a week before loading.

- Contact your vendor for passwords. For example, Synnex, Tech Data, and Mid-Continent require Cost Column passwords. You can only get these from the vendor.

- Perform your normal day-end procedures (or day-end proc), if necessary.

- Back up all system units in use.

- Go to the DDMS® Customer Support Center to run the OPUS Install.

- Execute the SIMPLE program. (Set and view all global and vendor parameters prior to running the update.)

Note: Once you begin the update, you can leave the program unattended.

Post-Load OPUS Update Checklist

After the update is complete, perform the following steps:

- Back up the Inventory, Inventory History, Inventory AUX, Serial, Contracts, Purchasing, Order Entry, Sales Journals, and Sales History units using your normal backup method. If you do not back up these units now and you have to restore later, you must reload the OPUS file.

- Perform any custom features, including those in the OPUS Toolbox. These procedures can be done at any time after the post-load backup is complete. For more information, see the OPUS Toolbox handout.

Note: You must manually compress the CONTRACTS file at the end of the update. If a large number of item keys (item number and company) change during an OPUS load or if you delete a large number of records, you should compress your inventory files. You should also compress these files if you delete a large number of records. For details, see the next heading.

Compressing Files

Compressing your files prior to performing the item update can produce great benefits. Performing this step reduces errors or hang-ups during your load. Therefore, we recommend that you run the ;SPCCMPJR program a few days to a week before you schedule your OPUS item update.

1. Shut down and backup your data just as you do for any dedicated procedure that affects files.

2. Stop the TBL Server. To do this, click the TBL Server icon.

3. When the TBL Server dialog box opens, click the Utilities menu and click Stop.

4. In the TBL Server dialog box, click the Tools menu and choose TBL.

5. In the Program Selection field, type **ZB4** to access the text-based (ZB4) screen.

Note: Make sure your Caps Lock is on.

6. In the Enter File Name field, type **;SPCCMPJR** and press Enter.

7. The Compress Journal Files screen opens. In the Journal Type field, type V and press Enter.

8. In the Compress Files by Volume screen, press Tab to move the cursor to the 5) Inventory field.

9. To mark the file for compression, type **X**.

10. When the cursor moves to the Inventory History field, type **X**.

11. In the Inventory Aux field, type **X**.

12. In the Inventory Whl field, type **X**.

13. When the cursor moves to the Serialized field, press Tab.

14. In the Contracts field, type **X** and press Enter.

15. At the Are You Sure prompt, type **Y**.

16. When the procedure is complete, type **C** to continue.

17. Press Esc to return to the Master Menu.

18. Restart TBL Server by clicking the TBL Server icon.

19. In the TBL Server dialog box, click the Utilities menu and click Start.

Reviewing OPUS Notices

1. As you update files, please refer to these online help instructions. Doing so minimizes your time and expense and streamlines the process.

2. If you have questions about data after loading the update, fax your OPUS loading parameters along with an Item Report, using the (+I)[R] Item Reports Tool in the OPUS Toolbox, to Support. Upon receiving your fax, a support call is automatically entered. After determining how to best handle your particular situation, DDMS calls you. If this is your initial load of OPUS and you have questions regarding implementation, call Support to set up a consultation appointment prior to quarter-end.

3. In accordance with the licensing agreement, it is your responsibility to load only the vendor information which you have been authorized to load.

4. It is your responsibility to verify the accuracy of the loaded information.

5. It is your responsibility to obtain any necessary vendor authorization passwords.

6. It is your responsibility to back up all files affected by this update prior to executing the procedure.

7. Do not perform this update during store hours.

8. Loading any other service voids your support agreement with OPUS.

9. Merging DDMS system files with OPUS created item files is not supported at this time.

Reviewing OPUS Recommendations

Follow the recommendations listed below to avoid possible problems during the update or initial load process:

- Before loading your OPUS update, you must have the Save Manual Changes field in the (LE) Inventory Parameters screen set to N. If you are changing item keys or loading the update for the first time, it is not recommended to save changes. Changing keys temporarily uses a lot of disk space. However, once you complete the post-load checklist and run a full disk compression, the space used after the change is the same as before, except for new items or wholesaler lines added.

- Make sure the printer you plan to use is turned on, is online, loaded with paper, and ready to print at 17 cpi. If the printer stops during the load, the load stops until the printer is back online. If you specify to print optional item reports, and not just the mandatory Exceptions and Parameters Reports, you should use a high-speed printer.

- Have your vendor passwords ready, since some vendors require them. For example, Synnex, and Mid Continent require Cost Column passwords. You can only get a password from your vendor.

- If clearing the RECEIPTS file by flushing to backorders and then receiving to on-hand is not part of your normal day-end procedure, do it before loading the update. The RECEIPTS file is not converted by the CHG_IT (Change It) program.

- Clear the SHORT-BUYS file by placing all items within the file onto P/Os, if this was not already done as part of your normal day-end routine. If you haven't decided which vendor to order these items from, place them on a P/O to the Dummy vendor. The SHORT-BUYS file is not converted by the CHG_IT program.

- If you are going to load wholesaler flyers, decide which flyer numbers and contract numbers to use. Contact your wholesaler before beginning the OPUS update for the pricing programs with the cost and consumer levels to which you subscribe. You can also use the flyers and programs sheet on the Customer Support Center.

- Determine which index files you use so you can rebuild them after the load. For example, if you

retrieve items by description in order entry, you use the I-INDEX file.

- Do not attempt to load the update during store hours. Treat this update as a dedicated function.

- Back up your files before beginning the OPUS load.

Access the Portal and Run the OPUS Install

Note: Running OPUS Install is a dedicated procedure. Make sure no one else is using the system.

1. Log in to the DDMS Customer Support Center. .

2. In the Search bar, type **DDMS OPUS Software Update** and press Enter.

3. Click the Software Update article.

4. Select Click Here to Download.

5. When prompted, click Save As and save OPUSInstall.zip to a location on your hard drive. When finished, the OPUSInstall.zip Download Has Completed message displays at the bottom of the browser window.

6. Click Open Folder and unzip the OPUSInstall.zip file.

7. Double-click OPUSInstall.exe to run the program.

Using PSNControl to Download Quarterly Update Files

1. Click Start, then Programs.

2. Click PSNControl, then click PSN Control.

3. Select the update quarter. For example, for updates effective January 1, click 1st.

4. In the Enter File Name box, type the name of the file. To select the Multi-Vendor database for SIMPLE, type **OPUS.**

5. Click Add to File Transfer List.

6. The OPUS Database Download dialog box prompts you to confirm whether you have selected the correct quarterly update for this quarter. Click Yes to continue with the quarterly update. Click No to go back and change the quarter.

7. The file name for that quarter appears in the File Transfer List.

8. To start the download, click Transfer Now. The PSNControl window displays the download status. If the download is successful, the File Transfer List displays the Download Complete message. If the file cannot download, the File Not Found message appears. If you see this message, try again. If still unsuccessful, complete the PSN File Not Found form for any price plans you could not download. For details, go to the Customer Support Center.

Note: The amount of time it takes to download depends on your internet connection.

9. When the download is complete, click Exit.

Understanding the Load Process

The following information can help you understand the OPUS load process.

SIMPLE Automatic Functions

OPUS streamlines the update process by performing many of the necessary pre-load and post-load procedures for you, with one exception: you must perform your normal day-end procedures, as well as any optional procedures in the OPUS Toolbox.

The automatic OPUS load:

Pre-Load

- Deletes the I-SUPER, NEW-C-ITEM, I-CAT, BAD-REFS, I-DUPS, I-A-INDEX, and I-INDEX files

While Loading

- Creates and updates the OPS-CHANGE file, if you so specified in the Global Inventory Parameters screen

Post Load

- Prints the I-DUPS and BAD-REFS files

- Executes the DDMS (;SPCCHGIT) Change It program updates the item key (item number and company) in supplemental files based on the changes recorded in the NEW-C-ITEM file during the latest OPUS load

- Rebuilds the inventory indexes that you selected in the Reindexing window (including the I-SUPER index, if you so specified)

- Rebuilds your P-MASTER index, P-INDEX, and Sales Journal Index, JO-INDEX (your normal (TR)[E] function)

Understanding Reference Items

Reference-only items are those you do not sell. Instead, you always sell an alternate item in its place.

Item Key Changes

If you select the Update Item Numbers with Changes from Vendor option in the Global Inventory Parameters window, a reference-only item is created when the existing number changes. When this occurs, the original item changes to the new stock number. A new I-MASTER record is created with the old stock number, using the alternate code for the reference-only item in the (LE) inventory parameter screen and the stock class of the original record.

Understanding Discontinued Items

Deleted items are those reported as discontinued by the vendor. To determine which items have been discontinued, print a report of all items that have the text Deleted in the ID box of the purchasing vendor. To print the report, limit the Purchasing Vendor Ven ID From and To fields in the (R) Inventory Selectors screen to the text DELETED.

You can also print a report of all items that were not updated during the last OPUS update. However, these items are not necessarily discontinued. You can use the Last Update box in the Item window for limiting reports. If you use the (RR) Inventory Reports screen, you can limit the report using the Date O/S/U field. Enter a date range that precedes your last OPUS update. For example, if you ran the update on 09/28/22, you could limit the report to Date/U From 01/01/21 and Date/U To 09/01/22.

Note: After the load is complete, you can also manually create reference-only items using the (+I)[X] feature in the OPUS Toolbox if necessary.

This report lists:

- Items in stock classes that you specified not to update at all

- Items not on the OPdb database file, including discontinued items not sent to OPUS by the vendors

- Items with item keys not recognized by your OPdb database file.

Determining the Selected Vendor

Before updating items, the vendor to whom an item belongs is determined. This is the selected vendor. The item belongs to either the wholesale vendor specified in your file before the update; the primary vendor you selected; or an exceptions vendor you selected.

You use the Update Items to My Primary Vendor Whenever Possible box in the Global Inventory Parameters window to specify which vendor information to load. Check this box to use the primary vendor's data. If the primary vendor does not carry the item, it uses the data of the first exceptions vendor that does carry it.

Leave this box blank to use the data of the existing wholesale vendor. If that vendor is not on the database file or that vendor does not carry the item, it uses the data of the primary vendor. If the primary vendor does not carry the item, it uses the data of the first exceptions vendor that carries it.

Understanding Selling Units

When you load new items, you must decide whether to load the retail, buy, or list unit as your selling unit. The selling unit is the unit of measure in which you sell the item. The following outlines your available options after you update the items. *This parameter only applies when loading new items. Existing items are not affected by this parameter.*

- Retail Unit

- List Unit

- Buy Unit

Examples:

	Item	Sell Unit	Buy Unit	Of:
Retail:	Pen	EA	DZ	12
	Rubber Bands	BX	BX	1
List:	Pen	DZ	DZ	1
	Rubber Bands	CT	BX	*10
Buy:	Pen	DZ	DZ	1
	Rubber Bands	BX	BX	1

Which Unit to Use:

No one can tell you which unit to use for the selling unit. However, point-of-sale dealers usually load retail, at least for the items they stock in their retail stores. Most consumers expect to be able to buy a single pen in a retail store. Commercial dealers often demand that pens be sold only by the box.

Note: These are terms used by DDMS and OPUS. They may not correspond to similar terms used by some wholesalers. Wholesalers provide multiple levels of packaging in the files they send to OPUS. This allows you to select a unit of measure in which to sell the items. However, this may be different than the item's purchasing unit.

Understanding UPC Codes

- UPC numbers load automatically when you load OPUS using SIMPLE.

- This feature is used with bar code scanners on the DDMS system.

- The UPC number is a unique code for the product, not the selling unit. When you scan the product's bar code, its unit of measure is displayed according to how it is set up in the Item window, regardless of the product's package that you scan.

- You must set up the customer UPC with account number UPC in the Customer window.

- You must set up the Customer COMMON with account number COMMON in the Customer window.

- During the load, the UPC number loads into the I-ALIAS file under the customer UPC. After the load is complete, open the Item database in DDMS. From the View menu, click Item Alias. Use the Item Aliases Copy function to copy from customer UPC to customer COMMON to have the UPC alias reference for all customers. Once the copy function is complete, delete all customer UPC aliases.

Managing Dated Goods

Many wholesalers add next year's dated items beginning with the second quarter, and continue doing so through year-end. There are two ways to handle adding these items. These examples use 2019 as the current year and 2020 as the new year.

First Example of Managing Dated Goods

To track history on the current year's items (19) and prepare to track history by having two item numbers for the Dated Item Sku on the upcoming year (20):

1. Make sure the Update Manual E Screen Item Changes to Other Files During MA field in the (LE1) Inventory Parameters screen is set to Y or Z.

2. Run an On-Hand Inventory Report on the stock class that contains your dated items, limiting to only items that have on-hand quantities.

3. Using this report as a reference, manually change the item number in the Item Master tab to distinguish the current year (19) item from its original item number. To do this, assign a dash with the current year at the end of the item (-19) so the OPUS item database ignores the item and adds next year's. For this to work correctly, you must enter the dash. Changing the stock class, department, SIC code, and so on makes mass deleting and reporting of the (19) items easier.

Example 1:

If your item already has 19 at the end of the item:

Original Item#:   0170019   Stock Class: D

Changed Item#: 01700-19   Stock Class: X

Example 2:

If your item does not have 19 at the end of the item:

Original Item#:   01700   Stock Class: D

Changed Item#: 01700-01   Stock Class: X

Note: You must enter the (-) dash. This is essential for this to work properly.

4. Once you change the item number, along with the Stock Class, Dept, SIC, and so on, a number of messages appears:

   Want to change Extended Number? Answer No.

   ** Bring History Of Original Item? Answer Yes.

   ** Delete Original Item? Answer Yes.

   Change This Item # On Other Files During MA? Answer Yes.

5. Be sure to check the Add New Items to my Inventory option in the Global Inventory Parameters window.

Note: Perform manual changes to the Item Master tab the day before the OPUS load so you can perform an (MA) backup at the end of the day to update the item key changes.

Second Example of Managing Dated Goods

Use this method to add the new year's dated items into your inventory and track item history for the sale of a Dated Item Sku, no matter what the year.

Note: This method has one item number for the 19 and 20 Dated Item Sku.

To manage dated goods this way, be sure to check the Update Item Numbers with Changes from Vendor option in the Global Inventory Parameters window.

Understanding the Disk Units Affected

One or more hard disk units are affected by an update, depending on the parameters you set in the (L0) screen. Verify that the drive where DDMS resides has enough available space.

Understanding the Glossary of Terms

This glossary defines OPUS terminology. If you find an unfamiliar term used in OPUS, you can quickly check this glossary for a definition.

Buy Unit	A unit of measure in which you purchase an item from a vendor. This may be the retail or the list unit.
Exceptions	Items carried by other vendors, but not by your primary vendor.
Exceptions Vendor	Any vendor selected to load as an exception (not your primary vendor).
List Unit	Next packing unit of measure up from retail unit, as reported in the OPUS file.
Load/Loading	Using data on the database file to add information to your files or change information in your files.
New Items	Items that exist on the database file, but do not exist in your files. New items may or may not be added to your files, depending on the choices you make.
OPdb	Office Products database file as provided by OPUS.
OPUS	Office Products Update Service, Inc.
Primary Vendor	Our first choice vendor (wholesaler).
Program Cost	Vendor's flyer/promotional dealer level cost.
Program/Program ID	Vendor prefix or designated name for a flyer/promotion.
Reset	To change your data to what is on the database file.
Retail Unit	Lowest unit of measure reported in the OPdb file.
Selected Vendor	A vendor for a particular item. For new items, it is either the primary vendor or the first exceptions vendor that carries the item. For existing items, depending on your choice, it is either 1) the vendor specified in your files; or 2) the primary vendor or exceptions vendor, whichever the item exists for first, in order of preference. This is determined by your answer to the Update Items to my Primary Vendor Whenever Possible parameter in the Global Inventory Parameters.
Sell Unit	Selling unit of measure recorded in your system. May be the retail, the list, or the buy unit.
Update	To change item information in your files to the information contained on the database file.
Vendor's Items	The first four characters of the wholesaler vendor field are used to match an item in your file to a wholesaler on the database file. For example, UNIT=Essendant™, SPAR=Sparco. When your wholesaler vendor number field has the first four characters of a vendor on the OPdb database file, it is said to be a match, or to belong to that vendor.
Wholesaler Vendor	The vendor specified in the Add Wholesale Vendor dialog box in the Item window.

SIMPLE Parameter Screen Options

There are multiple ways you can load OPUS files. For example, you can use your parameter settings from the last OPUS load. However, OPUS and DDMS recommend you choose the I Want To See All Options Available to Me option when you load each new quarter's data file.

You can use this option to select primary and secondary vendors, change your global inventory parameters, change parameters for specific vendors, or change reindexing options. This allows you to review and change all your global and parameter settings, based on the current pricing information you receive from your vendors.

Note:	The EBS SQL Import Panel includes a Scheduler Engine. During your OPUS load, if an import or an SQL file synchronization begins, it could cause the OPUS SIMPLE and post-load programs to take longer to complete. For this reason, we recommend that you stop the EBS SQL Import Scheduler Engine before you execute the SIMPLE load.
	When you launch the SIMPLE wizard, the Scheduler Engine automatically stops, and you can continue your OPUS load without taking further action in the EBS SQL Control Panel.
	After you complete your OPUS and post-load procedures, when you are ready to re-import files into EnsiteEBS, launch the EBS SQL Import Panel. On your DDMS server, click Start, Programs, Startup, then EBS SQL Import Control Panel. Click Start Scheduler Engine. (Once the Scheduler Engine is stopped, you must manually start it.)

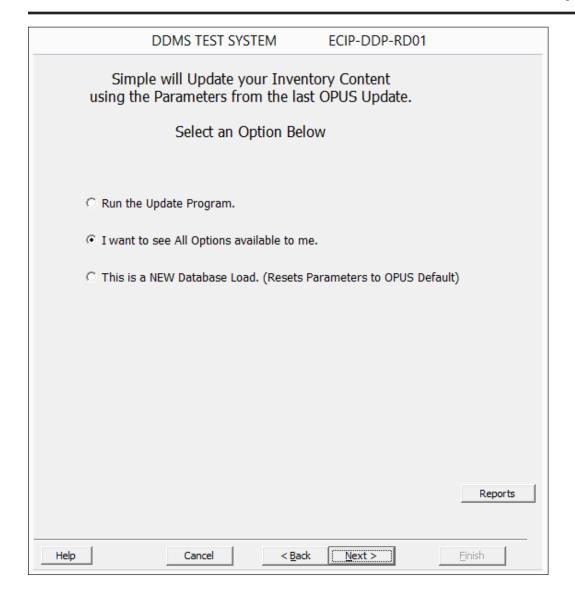When the Select an Option Below window opens, choose from one of the following:

Note:	The Load Flyer option has been removed from the SIMPLE wizard for both Essendant and S. P. Richards. Price plans can be obtained and loaded using PLUSESND or PLUSSPR.

- Run the Update Program: This option uses your previous

- OPUS global and vendor settings and begins the update process immediately. Select this option if you have loaded OPUS previously and do not need to change or review any global or vendor parameters.

Note:	While this option uses your previously saved settings, you should select the I Want to See All Options Available to Me option to review your parameter settings prior to loading this update.

- To see All Options available to me: THIS IS THE PREFERRED OPTION. This option allows you to view all parameters. It pays to review all parameters before beginning the load. Better to spend a couple of minutes making sure everything is set correctly rather than having to load OPUS a second time.

- **This is a NEW DATABASE load:** Reset parameters to OPUS default. Only dealers who are loading OPUS for the first time typically use this option since it erases parameters previously set by the dealer.

When you download the OPdb file, PSNControl automatically loads OPdb Multi-Vendor database and associated update program files into the appropriate DDMS system folders, and modifies the SIMPLE initialization file for loading the update from the system folder.

Viewing All Available Options

Note: Before beginning the update, you must complete your normal pre-load steps.

1. Make sure TBL Server is running.

2. Click Start, then click Programs. Click SIMPLE, then click SIMPLE.

3. Once the Welcome to OPUS Inventory Menu opens, click Next.

4. At the Select an Option Below screen, click I Want to See All Options Available to Me. Click Next. The Select the Options you Wish to View window opens.

5. This window lets you select the information to change. You can choose from the following:

    •   Select Vendors: Click to view or change the vendors from whom you purchase items, first call (primary) vendor, second call vendor, and so on. See **Selecting Vendors**.

    •   Global Update Options: Click to view or change your global parameter settings. See **Setting Global Inventory Parameters**.

    •   Vendor Specific Parameters: Click to view or change parameters for specific vendors from whom you purchase items. See **Setting Vendor Specific Parameters**.

    •   Reindexing Options: Click to view or change indexes to rebuild once the update is complete. See **Reindexing Files**.
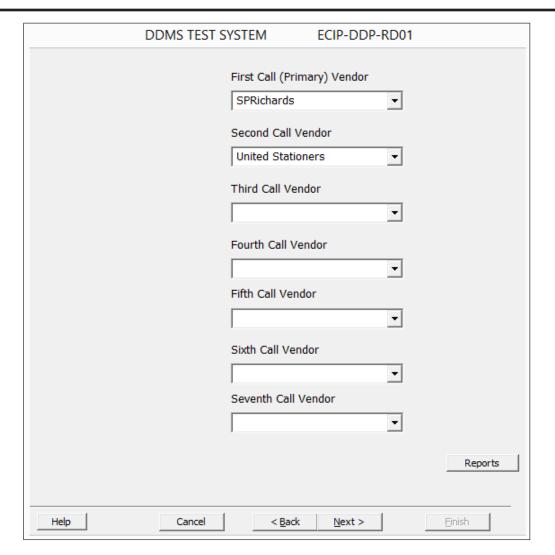
Selecting Vendors

You select vendors by specifying which to use as your first call or primary vendor, and from which vendors to load exceptions. You must specify these vendors in order of preference. Any vendors you select other than your primary vendor (second call, third call, and so on) are considered your exception vendors.

Note: On the initial load of your inventory files, all the current items for the primary vendor are added. If you choose a secondary vendor, items not carried by the primary vendor are loaded. If you choose a third vendor, items not carried by the primary or secondary vendors are loaded, and so forth.

Loading items not carried by the primary vendor is called loading exceptions. Only load items for which you have obtained authorization from the vendor to load. Although OPUS does initially request authorization for you, it is ultimately your responsibility to obtain authorization.

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1. When the Vendor window opens, you can select your first call (primary), secondary, third, and fourth call vendors. In the First Call (Primary) Vendor list box, click the down arrow and select the vendor to assign as your primary vendor.

2. In the Second Call Vendor through Sixth Call Vendor boxes, click the list box and select any additional vendors in order of preference to load as exceptions.

3. When you finish selecting vendors, click Next.

Setting Global Inventory Parameters

You can view or change your global inventory parameter settings for the OPUS load. The Global Inventory Parameters window actually consists of three separate windows that display all the available global parameters. To move between parameter windows, click the Next or Back button.

DDMS TEST SYSTEM   ECIP-DDP-RD01

Global Inventory Parameters

☑ Add New Items to my Inventory.

○ Retail ○ List ◉ Buy   Unit of Measure should be used for New Items.

[W ▼] is the Stock Class for New Items Added to my Inventory.

☐ Print the New records added to my Inventory.

☐ Print the New records NOT added to my Inventory.

☐ Print the Items that are being Updated.

☑ Print the Exceptions to a File.

☑ Update Items to my Primary Vendor whenever possible.

☑ Update Items Numbers with Changes from Vendor.

☐ Use the Trade Service Standardized Short Product Descriptions.

[Reports]

[Help]   [Cancel]   [< Back] [Next >]   [Finish]

1. In the Global Inventory Parameters window, make your selections according to the following.

    - **Printer for Parameters:** (Mandatory) You must specify a valid printer—if you do not, it does not load. If a dealer is using a file printer, it must be one that prompts you to enter the path, otherwise, only the last report is available for review. These reports are very crucial to help troubleshoot problems and also help the dealer in properly maintaining their database.

    - **Add New Items to my Inventory:** (Optional) It is important to choose YES if you are adding a new vendor or to include new items added by your current vendors. Fourth quarter is the time that most new items are added.

    - **Unit of Measure Should be Used for New Items Retail/List/Buy:** (Optional) How you select this option does not affect your current database. It only applies when adding new items to your system.

continue to next page

- The retail sell unit is the smallest reported selling unit (packaging) for a particular item. Usually, this is an each (EA). Some dealers with retail stores may use this option, but realize they may be selling items in smaller UOM than they can purchase from the vendors.

- The **list** unit is the next packaging type up from the retail unit. This can be a pack, a box, a carton, or other forms of packaging, depending upon the item.

- The **buy** unit is the unit of measure in which the selected vendor sells the item to the dealer, as stated in the data OPUS receives from the vendor (often called the list unit in net pricers). This can be the retail unit for some items, and the list unit for other items. The majority of dealers choose this option because they sell in the same UOM in which they buy the product.

- **Stock Class for New Items Added to My Inventory:** Enter the stock class to assign to new items loaded into your database with this update. The default (blank) is stock class W. Many dealers use a stock class not currently in use to run reports on the new items added. They then mass change them to their appropriate stock classes.

- **Print the New Records Added to my Inventory:** (Optional) Running this report slows the OPUS load considerably. If you need a list of these items, we recommend using a unique stock class and run an inventory report, limiting to that stock class, after the load has completed.

- **Print the New Records NOT Added to my Inventory:** (Optional) Running this report slows the OPUS load considerably. Select this prompt to print all new items for your selected vendors that were not added to your database, based on your parameters. To see this information, it must be requested to print during the load process, since it cannot be printed later.

- **Print the Items that are Being Updated:** (Optional) Selecting this prompt slows the updating process, since every item (updated and exceptions) prints. This prints all items that were up-dated, along with the exception items.

- **Print the Exceptions to a File:** If you leave this check box empty, the Item Exceptions is sent to your default printer as usual without the new sorts, and is not saved to your disk.

  If you check this box, the Item Exceptions is saved to a file on your DDMS system's Work Unit so it is sorted by manufacturer and item number, and you can print it when you are ready. A new file is saved each time that you perform the Catalog update, with a file name that includes a date stamp in the following format:

- **OPMMDDHHMM** where OP = OP, MM = Month, DD = Day, HH = Hour, MM = Minute

- **Update Items to my Primary Vendor Whenever Possible:** All items in your database that are carried by the primary vendor are converted to that vendor's number. If you do not select this prompt, the load matches on the dealer's current wholesaler vendor and updates with their in-formation. New items are updated by primary/exceptions vendors from parameters.

- **Update Item Numbers with Changes from Vendor:** This prompt lets you reset all old stock num-bers in your files to any new stock numbers the vendor may now be using. A file is created on your work unit (as specified in the (L0) screen) called NEW-C-ITEM. The Change-It program uses this file to convert the keys of related files.

- **Use the Trade Service Standardized Short Product Descriptions:** You can use this option to load standardized short descriptions of up to 30 characters from Trade Service (TSC). Trade Service's short descriptions can result in more reliable product searches. For example, a search for Chalk-board displays all chalkboard items loaded from the Trade Service database. If you check this box, the system replaces the existing wholesaler's item description with the new TSC descrip-tion. (Item descriptions display in the Description box in the Item Master tab.)

Note:	If a Trade Service description does not exist for an item, the existing description is used, even if you check this box. For example, TSC might not have descriptions for all new wholesaler items, dealer-customized items, and/or items from imported sources not included in the OPUS load. Also, since TSC descriptions are not translated into French, they do not appear when using the Canadian SIMPLE wizard.

2. After you finish setting parameters in the first window, click Next. Set parameters in the next window according to the following.

- **Update Consumer Catalog Page Numbers:** This prompt lets you reset the catalog page numbers in your file to match those on the update.

- **Update the Program ID with Deleted if the Vendor is Deleting the Item:** Wholesalers often mark items as deleted when they plan to no longer carry the item. The name DELETED is put in the Program ID field of the Purchasing Vendor.

- **Reset my Selling Unit When Updating List Price:** Resetting changes the name of the unit to match its pricing category. This does not change your Unit of Measure—only the name.

- **Update List Price Only if the New Price is More than the Current Price:** This prompt lets you have the List price updated only if it is an increase.

- **Create the I-UOM File for Multiple Units of Measure:** This prompt works with DDMS software versions that allow the dealer to sell products in multiple unit of measures, while still maintain-ing product history. You may also select to create the I-UOM file for information purposes only. Do not select information purposes only if you intend to utilize the DDMS multiple selling unit software.

- **Create the OPS-CHANGE File:** This creates a file that captures item number changes, List Price changes, and dealer Cost changes, for viewing and reporting purposes.

- **Run Make-Buys After the Update:** Check this box to run the make-buys option after the update is complete. When you select this option, additional prompts appear.

  In these In these boxes, you MUST enter the item stock classes that you WANT to convert. When you specify limits, the system views the stock class field set in the item's Master record (I-MASTER). While each item may also have a different stock class set in the I-PRICE file, the system does not view the I-PRICE information. Only the stock class information set in the I-MASTER file is viewed. Enter at least one stock class of items to reflect the new vendor's UOMs. You can enter a range of stock classes. Use the first space as the stock class specifying

the From portion of the range, place a dash in the second space, and use the third space for the stock class specifying the To portion of the range. Stock classes entered in the fourth through tenth spaces are in addition to those within the range specified. Examples:

[2] [Y] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] = updates the 2 and Y stock class

[0] [-] [Z] [ ] [ ] [ ] [ ] [ ] [ ] [ ] = updates ALL classes

[A] [-] [L] [ ] [ ] [ ] [ ] [ ] [ ] [ ] = updates classes A thru L

[A] [-] [L] [O] [P] [U] [S] [ ] [ ] = updates classes A thru L, and classes O, P, U, S
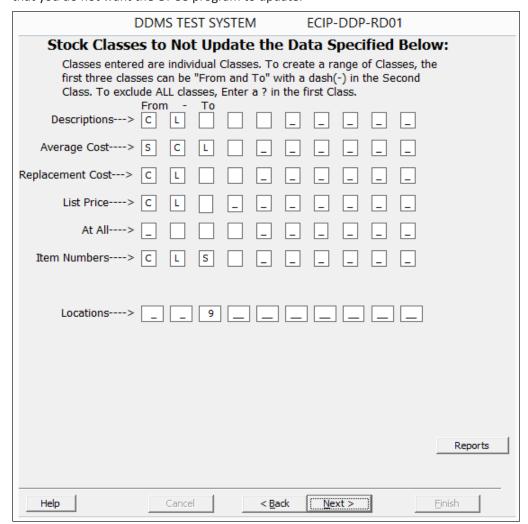
- **Convert your items with Larger Sell UOM to Match the Whlsrs Smaller Buy UOM:** Check this box to convert your items during the update process.

Note: By default, the Make-Buys program adjusts your selling UOM to match your primary wholesaler's buy unit when the buy UOM is larger than your selling UOM. You can also adjust your selling UOM when it is larger than the buy UOM by checking the Convert Your Items With Larger Sell UOM to Match the Whlsrs Smaller Buy UOM box.

3. After you click Finish, the You Have Selected to Run the Make-Buys Program during the Simple Update prompt appears. Click Yes.

4. When you finish setting parameters in the second window, click Next. The last window opens, as shown below.

   Use the Stock Classes Descriptions through Stock Classes Item Numbers boxes to enter stock classes that you do not want the OPUS program to update.

5. In the Stock Classes Locations boxes, you can exclude inventory locations whose I-PRICE records you do not want to change in the Item window. For example, you may not want to update any inventory locations other than location 01.

   To exclude a specific inventory location, enter the locations you do not want to update. For example, to not update location 02, enter 02.

To exclude a range of inventory locations, in the From box, enter the first location in the range. Enter a dash (-) in the second box to indicate that you are specifying a range. In the To box, enter the last location. For example, to exclude locations 02 through 04, enter 02 in the From box, followed by a dash (-) in the second box and 04 in the To box. In the remaining boxes, enter up to seven additional locations outside the range, locations 06, 08, 10, for example.

To update all locations, leave the From box blank, (the first box in the range).

If you do not want to update any locations, other than location 01 which is automatically updated, specify a ? (question mark) in the From box, (the first box in the range).

6. After you finish setting parameters in the last window, click Next. The Select Options You Wish to View window reopens. You can specify vendor parameters or select the indexes to rebuild when the update is complete.

Setting Vendor Specific Parameters

1. After you click the Vendor Specific Parameters button, the Primary Vendor window opens. You can view or change your vendor parameters.

2. Click each box to change and enter the information. For example, specific vendor parameters could include the following:

   • Add Items Shown in the S.P. Richards Consumer Catalog Only: Check this box to add all items displayed in the vendor's current catalog. If the item has a current page number, it is loaded.

   If you leave this box blank, every item in the vendor's database is added. Most dealers leave this box blank to gain a better selection of items.

Note: The Add New Items to My Inventory option in the Global Inventory Parameters window must be checked. Also, items listed in the wholesaler's net pricer with the words NEW or NEXT may be loaded depending on whether they were included on the database file sent to OPUS. If they were included, they are considered cataloged items.
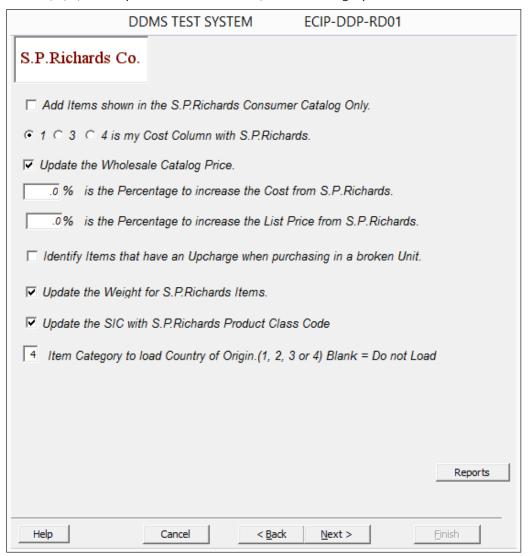
   • 1/2/3/4 is my Cost Column with S.P. Richards: Click the 1 though 4 options to select the cost column from your vendor to use for loading and updating. You must select a cost column option.

   The cost you select updates the replacement cost on all updated items. It also updates the average cost, if so specified in the Global Inventory Parameters window. This cost can be increased by setting a percentage in the % is the Percentage to Increase boxes.

   • Update the Wholesale Catalog Price: Click this option to update the Catalog and List boxes in the Item window.

   • If you leave this box blank, only the list price is updated.

   • % is the Percentage to Increase the Cost From S.P. Richards: Click this box to enter the percentage by which the cost increased during this load.

   • % is the Percentage to Increase the List Price From S.P. Richards: Click this box to enter the percentage by which the list price increased during this load.

   • Identify Items That Have an Upcharge When Purchasing in a Broken Unit: S.P. Richards provides an indicator for items that have a cost increase if purchased in a quantity less than the first column quantity. This may not be the standard purchasing unit from Sparco.

- Update the Weight for S.P. Richards Items: Check this box to load the weight of an item into the Weight box in the Item window. The weight represents the weight of the selling unit of measure for the item in your inventory file.

  To not update the Weight box in the Item window, leave this box blank.

- Update the SIC with S.P. Richards Products: Check this box to load the product classification code of an item into the SIC box in the Item window. If the SIC box is being used, the product classification code overrides any information that currently exists in the SIC box.

Note: To obtain a list of product classification codes, contact your vendor.

- Item Category to load Country of Origin (1, 2, 3, 4) Blank = Do not Load: Click this box to enter the item category corresponding to the items' country of origin. You can set this box to category 1, 2, 3, or 4. If you leave this box blank, the item category is not loaded.

The Synnex vendor also includes one unique parameter.

- **Update Computer Supplies:** Click the Hardware option to update hardware along with computer supplies.

    - Click Software to update software along with computer supplies.

    - Click Neither to not update hardware or software.

    - Click Both to update both hardware and software along with computer supplies.

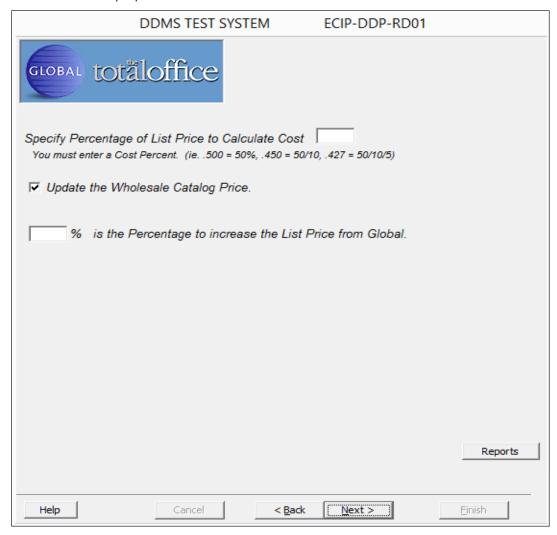The Global vendor includes one unique parameter.

- **Specify Percentage of List Price to Calculate Cost:** Global does not provide dealer cost. You use this box to create your initial cost. The value you enter is used to calculate a cost from the global list price. You must enter a cost percent, for example, .500 = 50%, .450 = 50/10, or .427 = 50/10/5.

3. When you finish setting parameters for this vendor, click Next.

4. The Parameter window for the next vendor opens. Set parameters for this vendor as you did for your first vendor, and click Next.

5. Continue to set parameters for all the vendors selected. When you finish, the Select Options You Wish to View window opens. You can set global parameters or select the indexes to rebuild when the update is complete.

Reindexing Files

1. When the Reindexing window opens, select from the following the indexes to rebuild after the upload is complete:

    *   **I-INDEX:** Retrieves items by description in the Item Master tab.

    *   **I-A-INDEX:** Used for customer specific alias numbers and common.

    *   **I-CO-INDEX:** Retrieves items by company and description.

    *   **I-DB-INDEX:** Direct-buy vendor index lets you print the 13 Month Low Stock Report more quickly. The direct-buy vendor index is not used for retrieving items.

    *   **I-EDIINDEX:** EDI is a method of transmitting business transactions between different types of computers.

    *   **I-SUPER:** Super Index links item numbers to any unique item numbers, prefixes, buy units, and UPC numbers you create for items.

2. When all the indexes to rebuild are selected, click Next. The Select Options You Wish to View window reopens.

3. To complete the load process, click Finish.

Viewing OPUS Load and Update Report Messages

After the update is complete, the Parameters Report prints, followed by a copy of the OPUS Load and Update Report. It lists item information and includes the following: the item number and manufacturer, the item description, the selling unit of measure, the number of selling units in the buy unit, the buying unit of measure, the old and new cost, and the old and new list price. This report also lists the percentage by which the item's price may have increased or decreased.

Messages are also included and list additional item information.

Not Found	No match to this item was found in your file. This does not necessarily mean that the item is not in your file. It simply means that a recognizable stock number was not found.
New Item	This is a Not Found item. The program continues, based on the loading parameters.
????-DEL	The item does not exist in your file, or the vendor has marked this item as deleted. It is not added.
Deleted	The item was marked as deleted by the vendor. If you specified to update the ID box in the Item window and the item exists in your database, this message indicates that the change is made.
No Match	The item on the database file does not have a vendor to match your wholesaler vendor.
No Whlsl	The item is carried by vendors that you did not select.
No Page #	The item does not have a catalog page number and you specified to add only cataloged items.
Ref Item	The item is marked as one that references another item number. No update occurs.
Not Added	The item is new in your system, but is not added because it is marked as deleted, has no page number, and so forth.
Not Stocked	You specified to add only items in the catalog, and this item is not in the catalog. It is not added.
Price Var	The units on the database file are very different from your selling unit of measure. On existing database items, if your unit does not exactly match any unit on the database file, your pricing is compared to the database file. If the list price for your selling unit of measure is more than 30% lower or 70% higher than the prices available for this item on the update, OPUS cannot update the item.
Key Change	If you specified to change your primary vendor's item numbers and the database item is recognized under a number that is different than your primary vendor's, the item number is changed.
Updated	The item was found in your database and in accordance with the load parameters, this item is updated. If the item is new but is marked as deleted by the selected vendor, it is not updated.
No Update	The item was found in your database, and in accordance with your load parameters, it was not updated.
Written	This message confirms that the item was either updated or added to your database and that the item's data was written to your file.

Complete	This is the last item in the OPUS file. This message may be overwritten by other messages.
Vend Swap	The item's vendor is being changed. It also displays the name of the vendor to which it is being changed.
Vendor Name	The name of the selected vendor prints.
Not Branch	Not carried in the branch you specified.
# Not Chg	The item was listed in a stock class for which you indicated you did not need the item number changed.

Item Exception Report

During your quarterly OPUS Multi-Vendor Catalog update, the SIMPLE software prints the OPdb Load and Update report, sometimes called the Item Exception report. This report lists items that could not be added or updated, and the reason why, such as a list price variance. After each quarterly update, you should review and correct each exception to avoid discrepancies in ordering and purchasing these items.

You can save the Item Exceptions report to a file that is sorted by manufacturer name, then by item. As a rule, each line item in the report is sent to the printer as the software encounters an exception.

Note: The file contains only item exceptions. Other reports still print to your default printer, including the SIMPLE Parameters, I-Dups, and Bad-Refs reports.

In the SIMPLE Global Parameters, you can enable the option shown below:

- Print the Exceptions to a File

- If you leave this check box empty, the Item Exceptions is sent to your default printer as usual without the new sorts, and is not saved to your disk.

- If you check this box, the Item Exceptions is saved to a file on your DDMS system's Work Unit so that it can be sorted by manufacturer and item number, and you can print it when you are ready. A new file is saved each time that you perform the Catalog update, with a file name that includes a date stamp in the following format:

    OPMMDDHHMM

    OP = OP   MM = Month   DD = Day   HH = Hour   MM = Minute

After the OPUS load is complete, print the report.

1. Go to the (L0) screen to note the volume serial label for your Work Unit.

    1.1 From the Master Menu, double-click then double-click .

    1.2 Double-click Text-Based Parameters.

    1.3 In the (L) screen, type **0** to select Global Master Parameters.

    1.4 When you have noted the volume serial label for your Work Unit, press Esc to return to the Parameter Editor window.

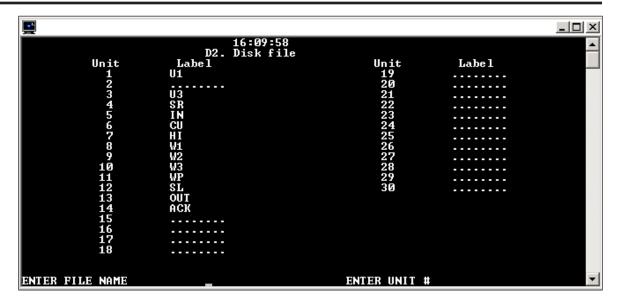2. Go to the (Z)[E1] View Disk Directory Utility screen to locate the file name of the Item Exceptions.

    2.1   From the Master Menu, double-click **Keyop Menu** then double-click **System Utilities**.

    2.2   In the (Z) screen, enter Utility Type [E] View Utilities and Subset Number [1] Disk Directory.

    2.3   Enter the Unit number at the top of the screen that corresponds with the volume serial label you noted in the (L0) screen. Press Enter.

    2.4   At the Detailed Listing prompt, type **N**.

    2.5   At the Enter File Mask prompt, you can set a limit to view only files that begin with the prefix OP. Type **OP** and press Enter.

    2.6   To view the next page of files, press the Spacebar.

    2.7   When you have found the OP file with a recent date stamp, make a note of the file name.

    2.8   Press Esc to return to the System Utilities menu.

3. Go to the (Z) [D2] Print Disk File Utility to print the report.

    3.1   To open System Utilities, double-click **Keyop Menu** then double-click **System Utilities**.

    3.2   In the (Z) screen, enter Utility Type [D] Print Utilities and Subset Number [2] Disk File.

    3.3   The cursor moves to the Enter File Name field. Enter the name of the file you noted in the (Z) [E1] screen. If you do not completely fill the field, press Tab.

    3.4   Enter the Unit number that corresponds with the volume serial label you noted in the (L0) screen, and press Enter.

    3.5   The Print The Entire File prompt appears. Press Enter.

    3.6   The Enter Width to Print (1-502) prompt appears. Type **130**.

    3.7   The Enter Printer prompt appears. Press Enter to accept the default printer, P1, or enter the logical name for another printer.

    3.8   When the report has finished printing, press Esc twice to return to the Main Menu.

For information on correcting list price variances, see Correcting List Price Variances After Loading OPUS.

Each copy of the Item Exception report is only a few kilobytes, but a new report is saved each time you load your quarterly update. In future quarters, you may need to delete the previous quarter's exceptions file to make the new report easier to find and to conserve disk space if necessary.

Frequently Asked Questions

The following represent questions frequently asked after the update is complete.

Why Didn't New Items in the Current Pricer Load?

Check the catalog page number as listed for the items in the Net Pricer. If the word NEW or NEXT is listed as the page number, the items may not have been included on the database file supplied to OPUS from the wholesaler.

Check the OPUS Global Parameter Add New Items to My Inventory. If this is not selected, new items are not added.

Check the Vendor specific parameter Add Items Shown in the Vendor's Consumer Catalog Only. If this is selected, new items may not be added.

Why Didn't Certain Items Load or Update?

Sometimes you can retrieve items carried by your primary wholesaler using the item number of an exceptions vendor. However, some items may have very different numbers, depending on the wholesaler. For example, the item number SMD 19980 is also listed as item number 2K-502-5A-1-3.

In addition, while the file loads, OPUS makes sure that there are no duplicate items in its file. Therefore, if a vendor provides several new items that OPUS cannot immediately identify from its cross-reference file, the items are not added immediately. This is especially true if the vendor provides the item information just prior to an OPUS database file release. These items are added as soon as OPUS cross-references them. This assures that they can safely be added to the file without duplication.

Some items are also not added or updated, based on the parameter settings you specified before beginning the update. If you have questions about the data, fax your loading parameters to Support. Be sure to list some of the missing vendor's items. If the item exists in your file, but was not updated, print an Item Report using the (+I)[R] Report Items Tool in the OPUS Toolbox, and fax the report to Support, along with your loading parameters. Receiving your fax generates a support call. ECI determines how to best handle your situation and then calls you promptly.

How Can OPUS Help Identify Duplicate Items in My Files?

The following steps can help you clean up your files using the OPUS database file:

1. As files are updated, they are searched for items that match the database file. If an item number in your file matches or closely resembles one being updated, the item is written to the I-DUPS file. This file is stored on your Work unit. At the end of the load, the I-DUPS file prints. It helps you identify duplicate items in your files.

2. You can also use the Last Update box in the Item window to locate duplicate items. If you have more than one item number for a particular item, OPUS updates only one. Print an Item Catalog Report, using the L Update field to limit to dates prior to the OPUS load.

3. The I-DUPS Report lists items that OPUS has found to be possible duplicate items.

4. Be sure to manually transfer any accumulated item history and item quantities to an item number OPUS can recognize and use. It may be possible to perform a mass change and delete these items. You should also change their alternate code to your code for discontinued or referenced items. For more details, see **What do I do with the I-DUPS File**.

What Do I Do With the I-DUPS File?

As files are updated, they are searched for items that match the database file. If an item number in your file matches or closely resembles one being updated, the item is written to the I-DUPS file. This file is stored on your Work unit. At the end of the load, the I-DUPS file prints.

This report can help you identify duplicate items in your files. You can use this report to determine which of the item's duplicate keys to keep as your stocking or selling item. The key(s) you do not use can be set as reference only items or deleted. (Before deleting any item, be sure to check any sales history or quantities that you may need to move to the stocking or selling key.)

Suppose you have a Smead folder under the two different item numbers: 2K5025A13 SMD and 19980 SMD. You normally sell and stock the item as 2K502A513, but it has also been sold using the 19980 number. In this case, set the alternate code of the 19980 number to the reference-only code and enter 2K5025A13 SMD as its alternate number. In the Item window, write down any sales history and on-hand quantities for this 19980 number. If there are any quantities in the backorder, allocated, or receipts file, be sure to take care of these orders and purchase orders before continuing. After you complete any orders, receive and release any purchase orders for the 19980 item number, and determine the corrected sales and on-hand figures, retrieve the 2K5025A13 item number. Add the sales and on-hand quantities from the 19980 number to the 2K5025A13 item number. This number is now the stocking or selling number. The 19980 item number is for reference only and cannot be ordered or sold. While this is time-consuming, it is necessary to achieve true inventory control.

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Note: There may be times when duplicates don't exist, but are written to the I-DUPS file. Sometimes, two items are so similar they are written as duplicates, even when they aren't. Frequently, this can happen when companies merge. In addition, as the item is being created and key changes occur, it may be written to the I-DUPS file, along with the old item number. There is a fine line between avoiding this and still identifying duplicates, without considerably increasing processing time.

What Do I Do With the BAD-REFS File?

If the alternate information in the Item window should contain a reference item but does not, it is listed on the BAD-REFS file. Items are also included if they cause a loop. (Item A is referenced to Item B. Item B is referenced to Item C, and Item C is referenced to Item A.) Print the BAD-REFS file to correct problem item references.

Why is the Cost or Price Incorrect in My System?

If, after running the update, you discover that an item's cost or price is incorrect, do the following to correct this problem:

- Be sure to perform the Best Cost function that you normally run after all item pricing updates are complete for this updated period. The Best Cost functions include the (+I)[T], (+I)[Z], or (+I)[L] procedures in the OPUS Toolbox handout.

- Be sure you received the most recent price programs from your wholesaler.

- If the above suggestions do not correct the problem, fax your OPUS loading parameters, along with an Item Report, using the (+I)[R] Item Reports Tool in the OPUS Toolbox, to ECI Support. Be sure to include items with the incorrect cost or price, and indicate what the correct cost or price should be. Receiving your fax generates a support call. ECI determines how to best handle the situation and calls you promptly.

OPUS Vendors

The following pages display a list of OPUS vendors, along with their corresponding codes. These vendors include SIMPLE main load, supplemental, and buying group.

SIMPLE Main Load Vendors

The following is a list of OPUS vendors and their codes. To load these vendors, use the OPUS SIMPLE wizard.

Code	Vendor
SPAR	Sparco (S.P. Richards)
SYNN	Synnex Information Technologies
UNIT	Essendant

Supplemental Vendors

The following is a list of OPUS supplemental vendors, along with their corresponding codes. To load these vendors, use OPUS Vendor MultiLoader software. You do not have to pay an additional fee for these vendors.

Note: Supplemental vendors are separate from SIMPLE. They provide their own documentation.

Code	Vendor
CLO	Clover Imaging Group (Custom File Option)
DCS-	Diversified Computer Supplies
DOAN	Doane Keys
EDUC	Educator Resource
IMAG	Image Star (Custom File Option)

Buying Groups

The following is a list of buying group vendors OPUS currently has available. Like supplemental vendors, buying group files are loaded separately from SIMPLE.

- Independent Suppliers Group (ISG): Files loaded using the ECI Content Integration program.

OPUS Vendor MultiLoader

For detailed instructions on processing other vendor's price files, see Using OPUS Vendor MultiLoader.

Using PSN Control to Download Additional Pricing Files

Several popular pricing files can be obtained and loaded using the OPUS VendorMultiLoader software and the ECI Content Integration. Essendant and S.P. Richards price plans can be obtained and loaded using PLUSESND and PLUSSPR. Additional pricing files that are not available can be downloaded individually using PSNControl.

Troubleshooting File Not Found

If the PSNControl File Transfer List shows File Not Found, follow these steps:

1. Check that the file name you entered is spelled correctly, and try again.

2. Contact your vendor to confirm that the file name you entered is correct, and that they have sent the pricing file to ECI Content Services. If they have sent the file, find out the date when they sent it.

Note: Files the vendor sends to ECI Content Services for distribution take up to two business days to process. If it has not been two business days since the vendor sent the file, please wait, then try your download again.

3. Wait two business days after sending the file to OPUS, and attempt to download the missing pricing files. If PSNControl still indicates File Not Found, contact ECI Support.

Listing My PSN Files

The My PSN Files feature of OPUS PSNControl software lets you make a list of the files to transfer, so you don't have to re-enter the file names every quarter. Information is arranged by vendor name.

1. Start PSNControl. Click Start, then Programs.

continue to next page

2. Click PSNControl, then click PSNControl.

3. Click the Go to My PSN Files button in the middle of the screen. The My PSN Files dialog box opens..

Note: If you have previously downloaded files, they are in the Misc tab. To learn how to move them to the appropriate vendor tab, click Help.
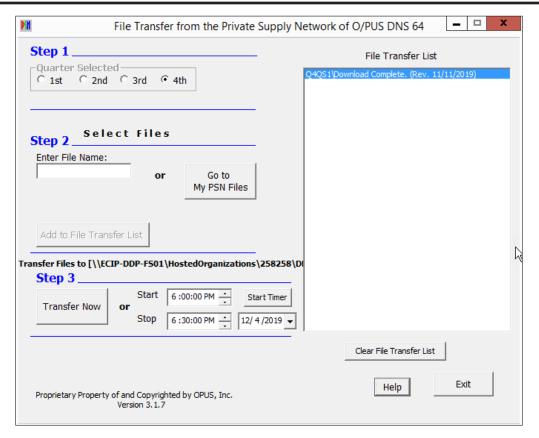
4. Click the tab for the vendor whose files to transfer.

5. In the Files Available From box, enter the program or pricing file name.

6. Click Add to Available Files or press Enter. The system records the file in the Available Files list, and the cursor returns to the Files Available From box. You can continue to enter file names.

Note: You can remove a file from the list. To do so, double-click the file name. At the Do You Really Want to Delete This Entry prompt, click Yes.

7. When you finish adding file names, click Add All Available Files to File Transfer List to move all the files listed at once.

8. The File Transfer List column shows all the files you have specified to transfer.

Note: To clear the file list, click Clear File Transfer List.

9. Repeat Steps 3-7 for each vendor.

10. When you finish specifying the files to transfer, click Close to return to the main PSNControl window.

11. Select the calendar quarter for pricing.

12. To download the files, click Transfer Now. The PSNControl window displays the download status.

13. When the file transfer is complete, click Exit.

Processing the Pricing Files

We recommend using the PLUSESND, PLUSSPR, and Vendor MultiLoader software to process price files. Only vendor sources not available from these vendors require using this method, Hallmark, for example. For these vendors, you must process them to move the prices to your item database files (I-WHL, I-MFG, CONTRACTS, and so on).

1. Go to the (+I)[F][P] screen by double-clicking .

2. Double-click .

3. Make sure your Caps Lock key is on.

4. Type **I** to access the OPUS Toolbox screen. Although you do not actually see the [I] option on the (+) screen, if you have previously loaded the OPUS software, you can select this hidden option.

5. Select the [F] BPIR Communications Menu.

6. Select the [P] Run Program action code.

7. Input the name of the update program to execute.

8. Next, follow the prompts of the update program. Vendor-specific instructions are available on the Customer Support Center.

Reference Tool: Keep Your Database Clean

Your inventory database is the largest in your DDMS system. While this is not an OPUS Toolbox function, we include it here to help you maintain your inventory data. By keeping it as clean as possible, you have several advantages:

- Faster searches

- Faster backups

- Faster restoration

- Faster re-indexing

- Conserve disk space, delaying the need to upgrade your hardware

- Fewer numbers in the database cause less confusion for your order-takers.

An important step in cleaning your inventory database is deleting items from your database that OPUS has marked as deleted. During the quarterly OPdb catalog update, the system marks items as deleted if you enabled the OPUS parameter check box, Update the Program ID with Deleted if the Vendor is Deleting the Item, under the Global Update Options.

If this box is checked, the system looks to see if any of the other vendors that you are loading carry the item. If so, it changes the item over to that vendor. If no other vendors carry the item, the system marks it as deleted in the I-WHL file. It displays in the Program field of the (E) screen's (Item window) Purchasing Vendor record.

The following instructions take you step-by-step through the deletion process to clean up your inventory database and supplemental files. In this mass deletion, you are deleting the inventory records for items that match all of the following criteria:

- Any item with no in-stock quantities on record in your I-AUX file.

- Any item that the OPUS load has marked as DELETED in the Program field of the Purchasing Vendor record.

- Any item that does NOT have a vendor specified in the Direct Buy I-MFG record.

Before performing these steps, back up your inventory units.

Note: This is a dedicated function and should be done after you have completed day-end procedures, or on the weekend.
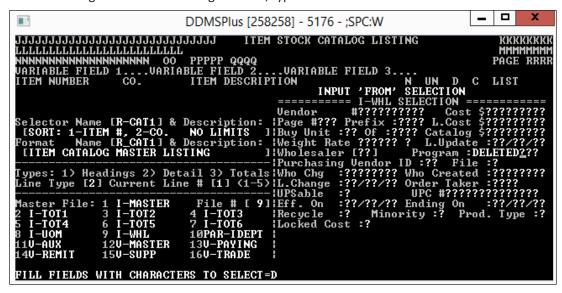

If you have a master password set up in the (X) Program Security screen, you must know it before proceeding.

1. Select the function and selector.

   1.1   Go to the (+) Specials screen.

   1.2   Select the (W) Setup & Execute Generic Specials screen.

   1.3   In the Plus Program Function field, type **B.**

   1.4   In the Lib [!SEL] Volume [SR??] field, press Enter.

1.5   In the Selector Name field, type **R-CAT1**. The screen displays a Master File menu.

1.6   At the Correct Selector prompt, press Enter.

2.   Limit to I-AUX records with no on-hand quantities.

2.1   At the Limit, Modify or Delete prompt, type **L**.

2.2   At the Location To Limit To prompt, press Enter.

2.3   At the Display Detail Only If Loc Exist prompt, press Enter.

2.4   If you are not live on Inventory — in other words, you do not have accurate on-hand quantities in the Inventory Usage Record of the (E) screen (Item window) — go to **Step 3**.

2.5   At the Master File # prompt, enter the number that selects I-AUX and press Enter.

Note: The menu of files and their selection numbers may change in each new version of DDMS software.

2.6   The Input From Selection subscreen appears, with the cursor in the Bin P field. Tab to the On-Hand field. Press the Spacebar once. Press Enter twice.

2.7   The Input To Selection subscreen appears, with the cursor in the Bin P field. Tab to the On-Hand field. Type **0** and press Enter twice.

3.   Limiting to I-WHL records where the program field shows DELETED.

3.1   In the File # field, press the Spacebar twice to view the second set of Master File selectors. New file names appear with selection numbers 1-16 to the left of each file name.

3.2   When the cursor returns to the File # field, type the number that selects I-WHL and press Enter.

3.3   The Input From Selection subscreen appears, and the cursor moves to the Vendor field. Press Tab to the Program field. In the Program field, type **DELETED**. Press Enter three times.

4. Limit to Items With No I-MFG Record.

    4.1   At the File # prompt, press the Spacebar twice to view the ORIGINAL set of Master File selectors. New file names appear with selection numbers 1-16 to the left of each file name.

    4.2   At the File # prompt, type the number to select I-MFG. The Input FROM Selection subscreen appears and the cursor moves to the Vendor field.

    4.3   Press the Spacebar once.

    4.4   Press Enter three times.

5. Delete specified files from I-MASTER.

    5.1   At the File # prompt, press Esc.

    5.2   At the Limit, Modify or Delete prompt, type **D**.

    5.3   At the File # prompt, type the number that selects I-MASTER and press Enter.

    5.4   Under the message, Files Used In This Delete, the message I-MASTER appears. Press Esc.

    5.5   At the Limit, Modify or Delete prompt, type **E**.

    5.6   If you have a master password set in the (X) screen, enter it when the Enter Password to Modify Data prompt appears.

    5.7   At the You Should Have a Backup of Files That Will be Modified prompt, type **N**.

    5.8   At the Are You Ready To Execute prompt, type **Y**.

    5.9   The system displays the items that meet the limits you set. When the process is complete, the cursor returns to the Selector Name prompt. Press Esc until you return to the Master Menu.

6. Once this process is complete, delete items with no master record from the supplemental files.

    6.1   Go to the (+) Specials screen, and select the (E) Modify Inventory Records screen.

    6.2   Select the (E) Delete Supplemental Files action code.

    6.3   The This Program Will Scroll Through all Supplemental Files and Delete Records With No Master Record message appears, along with the Are You Sure prompt. Type **Y**.