



# Rename and Merge Introduction

# Rename and Merge

## Agenda

- What is Rename and Merge and what does it do
- Walk through the application
- Q&A

# Rename and Merge

Visual Enterprise restricts changes to a primary ID once it has been used in a transaction

R&M safely disables Visual restrictions in the database, allowing updates to ID's and safely restores restrictions when it is done

Possible scenarios:

- Duplicate customers or vendors
- Changes to your Chart of Accounts
- Part catalog naming changes

# Rename and Merge

Rename and Merge works with these database objects as standard:

Feature	Rename	Merge	Feature	Rename	Merge
GL Accounts	x	x	Operation Types	x	x
Bank Accounts	x	x	Packlists	x	
Commodity Codes	x	x	Parts	x	x
Cost Categories	x	x	Product Codes	x	x
Currencies	x		Sales Reps	x	x
Customer Orders	x		Service Ids	x	x
Customers	x	x	Shift Ids	x	x
Department Ids	x	x	Ship Via Codes	x	x
Discount Codes	x	x	Shop Resources	x	x
Earning Codes	x	x	Tax Groups	x	x
Employees	x	x	Term Codes	x	x
Entities	x	x	Territory Codes	x	x
Fob Points	x	x	Vendors	x	x
Indirect Codes	x	x	Warehouses	x	x
Locations	x	x	WBS	x	x
			Workorder Base Ids	x	

# Rename and Merge

Features in the current R&M release 6.0.7

- supports all Visual Enterprise versions, including Visual 9.x
- Multi-Site compatible
- Options available to support Global Financials (GFIN) and Visual Quality
- Optional tools for Unit-of-Measure and Part-Location changes

# Rename and Merge

## Licensing

- The core application for Visual Enterprise is licensed by the number of Visual Sites in your VE installation
  - Pre-7.1 Visual, each live VE database will each count as a Site

Copies of your production databases do not count against your license count

Test databases are highly encouraged.

# Rename and Merge

## Introduction to the application

- Application screen layout
- Administration summary
- Building a list of tasks, how to tell if they'll run before you run
- Exporting and importing task lists
- Task execution

# Rename and Merge – Main Overview

**Rename and Merge**

File View Tasks Tools Help

Refresh Delete

Browser Administration

- Home
- History
- Error Log

**Home**

Select the desired DB Group to connect

Group: ORACLE - ORACLE DATABASE TESTING

Password:

Connect Disconnect Set as Default Connection

**Connection Information**

Current Connection: **Disconnected**

Default Connection:

**License Information**

Maintenance Expiration Date: 12/31/2050

Licensed Databases

Type	Allowed	Registered
Dcms	1000	0
Vfin	1000	1
Vmfg	1000	25

Display Database

**Messages**

V 6.0.7 VISUAL 9 Compatibility

As always, we strongly encourage that you test against a copy of your data before applying any changes to production.

Visual Quality users:  
Visual Quality has been discontinued by Infor. If you use the replacement IQM and want R&M to work with that product, please contact the Rename Help Desk and let us know. We are considering the possibility.

V 6.0.5 VISUAL 8.0 Compatibility  
The auto update feature has been corrected.

Copyright © 2000 - 2018

**Tasks - New / Un-saved Task List**

Execute Tasks Add Task Refresh Tasks

Seq. No.	Action	Old ID	New ID
----------	--------	--------	--------





# Rename and Merge – Main Menu

Rename and Merge  
File View Tasks Tools Help  
Refresh Delete



Administration  
Home  
History  
Error Log  
Rename/Merge  
Tools

Select the desired DB Group to connect

Group: ORACLE - ORACLE DATABASE TESTING

Password:

Connect Disconnect Set as Default Connection

Connection Information  
Current Connection: **Disconnected**  
Default Connection:

License Information  
Maintenance Expiration Date: 12/31/2050

Licensed Databases

Type	Allowed	Registered
Dcms	1000	0
Vfin	1000	1
Vmfg	1000	25

Display Database



Messages

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The auto update feature has been corrected

Copyright © 2000 - 2018

Tasks - New / Un-saved Task List

Execute Tasks Add Task Refresh Tasks

Tasks

Seq. No.	Action	Old ID	New ID
----------	--------	--------	--------

# Rename and Merge – Action Panel

The screenshot displays the Truefit software interface. The main window is titled 'Rename and Merge' and features a menu bar with 'File', 'View', 'Tasks', 'Tools', and 'Help'. Below the menu bar are buttons for 'Refresh' and 'Delete'. The left sidebar contains an 'Administration' section with icons for 'Home', 'History', and 'Error Log'. At the bottom of the sidebar are 'Rename/Merge' and 'Tools' buttons. The main content area is divided into several sections:

- Home:** A section for database connection management. It includes a dropdown menu to 'Select the desired DB Group to connect', currently showing 'ORACLE - ORACLE DATABASE TESTING'. Below this is a 'Password' input field and three buttons: 'Connect', 'Disconnect', and 'Set as Default Connection'.
- Connection Information:** Shows 'Current Connection: Disconnected' and 'Default Connection:'.
- License Information:** Displays 'Maintenance Expiration Date: 12/31/2050' and a table of 'Licensed Databases'.
- Messages:** Contains two messages: 'V 6.0.7 VISUAL 9 Compatibility' with a warning about testing on production data, and 'V 6.0.5 VISUAL 8.0 Compatibility' stating that the auto update feature has been corrected.

A red box highlights the 'Home' section, and a red arrow points to the window title bar. The bottom status bar shows 'Copyright © 2000 - 2018'. A secondary window titled 'Tasks - New / Un-saved Task List' is visible on the right, showing a table with columns for 'Seq. No.', 'Action', 'Old ID', and 'New ID'.

# Rename and Merge – Information Panel

**Rename and Merge**

File View Tasks Tools Help

Refresh Delete

Administration

- Home
- History
- Error Log

Home

Select the desired DB Group to connect

Group: ORACLE - ORACLE DATABASE TESTING

Password:

Connect Disconnect Set as Default Connection

Connection Information

Current Connection: **Disconnected**

Default Connection:

License Information

Maintenance Expiration Date: 12/31/2050

Licensed Databases

Type	Allowed	Registered
Dcms	1000	0
Vfin	1000	1
Vmtg	1000	25

Display Database

**Messages**

V 6.0.7 VISUAL 9 Compatibility

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V 6.0.5 VISUAL 8.0 Compatibility  
The auto update feature has been corrected

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Tasks - New / Un-saved Task List

Execute Tasks Add Task Refresh Tasks

Seq. No.	Action	Old ID	New ID
----------	--------	--------	--------

# Rename and Merge – Task Panel

**Rename and Merge**

File View Tasks Tools Help

Refresh Delete

Administration

- Home
- History
- Error Log

Home

Select the desired DB Group to connect

Group: ORACLE - ORACLE DATABASE TESTING

Password:

Connect Disconnect Set as Default Connection

Connection Information

Current Connection: **Disconnected**

Default Connection:

License Information

Maintenance Expiration Date: 12/31/2050

Licensed Databases

Type	Allowed	Registered
Dcms	1000	0
Vfin	1000	1
Vmfg	1000	25

Display Database

Messages

V 6.0.7 VISUAL 9 Compatibility

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V 6.0.5 VISUAL 8.0 Compatibility

The auto update feature has been corrected

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Tasks - New / Un-saved Task List

Execute Tasks Add Task Refresh Tasks

Tasks

Seq. No.	Action	Old ID	New ID
----------	--------	--------	--------

# Rename and Merge – Object Browser

Browser Administration

- Home
- History
- Error Log

Rename/Merge

Tools

Browser Administration

Rename/Merge

- Accounts
- Bank Accounts
- Commodity Codes
- Cost Categories
- Currencies
- Customer Orders
- Customers
- Department IDs
- Discount Codes
- Earning Codes
- Employees

Tools

Browser Administration

Rename/Merge

Tools

- Orphan Key Finder
- Part Location Collap...
- Part UOM Change

Rename and Merge

Administration

Home

History

Error Log

Tools

Tasks - New / Unsaved Task List

Execute Tasks Add Task Refresh Tasks

Tasks

Seq No.	Action	Old ID	New ID
---------	--------	--------	--------

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# Rename and Merge – Administration

Rename and Merge connects to Databases

Databases are put into Groups

Groups contain Databases that would naturally be connected

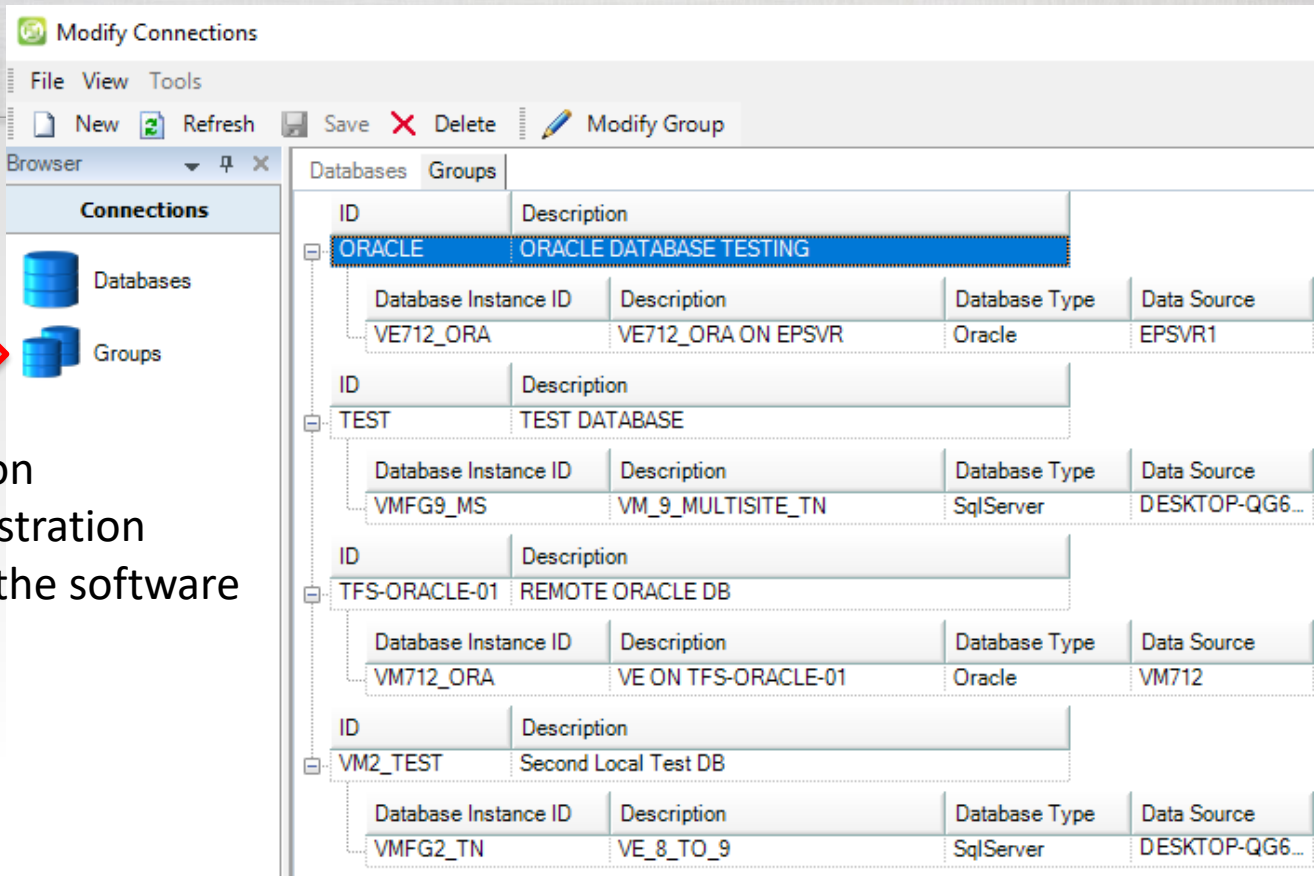
- e.g. production Visual, connected to production Global Financials
- e.g. test Visual, connected to test Global Financials

This allows for safety in testing, before committing tasks to production

Do not mix production and test Databases inside one Group

- Groups have passwords; consider using different passwords for production and test Groups

# Rename and Merge - Administration



The screenshot shows the 'Modify Connections' application window. On the left, a 'Connections' tree view shows 'Databases' and 'Groups' folders. A red arrow points from the 'Groups' folder to the main view. The main view displays a list of database groups and their instances.

ID	Description		
ORACLE	ORACLE DATABASE TESTING		
Database Instance ID	Description	Database Type	Data Source
VE712_ORA	VE712_ORA ON EPSVR	Oracle	EPSVR1
TEST	TEST DATABASE		
Database Instance ID	Description	Database Type	Data Source
VMFG9_MS	VM_9_MULTISITE_TN	SqlServer	DESKTOP-QG6...
TFS-ORACLE-01	REMOTE ORACLE DB		
Database Instance ID	Description	Database Type	Data Source
VM712_ORA	VE ON TFS-ORACLE-01	Oracle	VM712
VM2_TEST	Second Local Test DB		
Database Instance ID	Description	Database Type	Data Source
VMFG2_TN	VE_8_TO_9	SqlServer	DESKTOP-QG6...

Documentation on Database administration is provided with the software

# Rename and Merge – Connect to a Group

Browser

**Administration**

**Rename/Merge**

- Accounts
- Bank Accounts
- Commodity Codes
- Cost Categories
- Currencies
- Customer Orders
- Customers
- Department IDs
- Discount Codes
- Earning Codes
- Employees

**Tools**

Home

Select the desired DB Group to connect

Group: TEST - TEST DATABASE

Password:

Connect Disconnect Set as Default Connection

Connection Information

Current Connection: TEST

Default Connection:

License Information

Maintenance Expiration Date: 12/31/2050

Licensed Databases

Type	Allowed	Registered
Dcms	1000	0
Vfin	1000	1
Vmfg	1000	26

Display Database

VMFG9\_MS | VM\_9\_MULTISITE\_TN

Tasks - New / Un-saved Task List

Execute Tasks Add Task Refresh Tasks Delete Tasks Clear Tasks Options Clear Filters

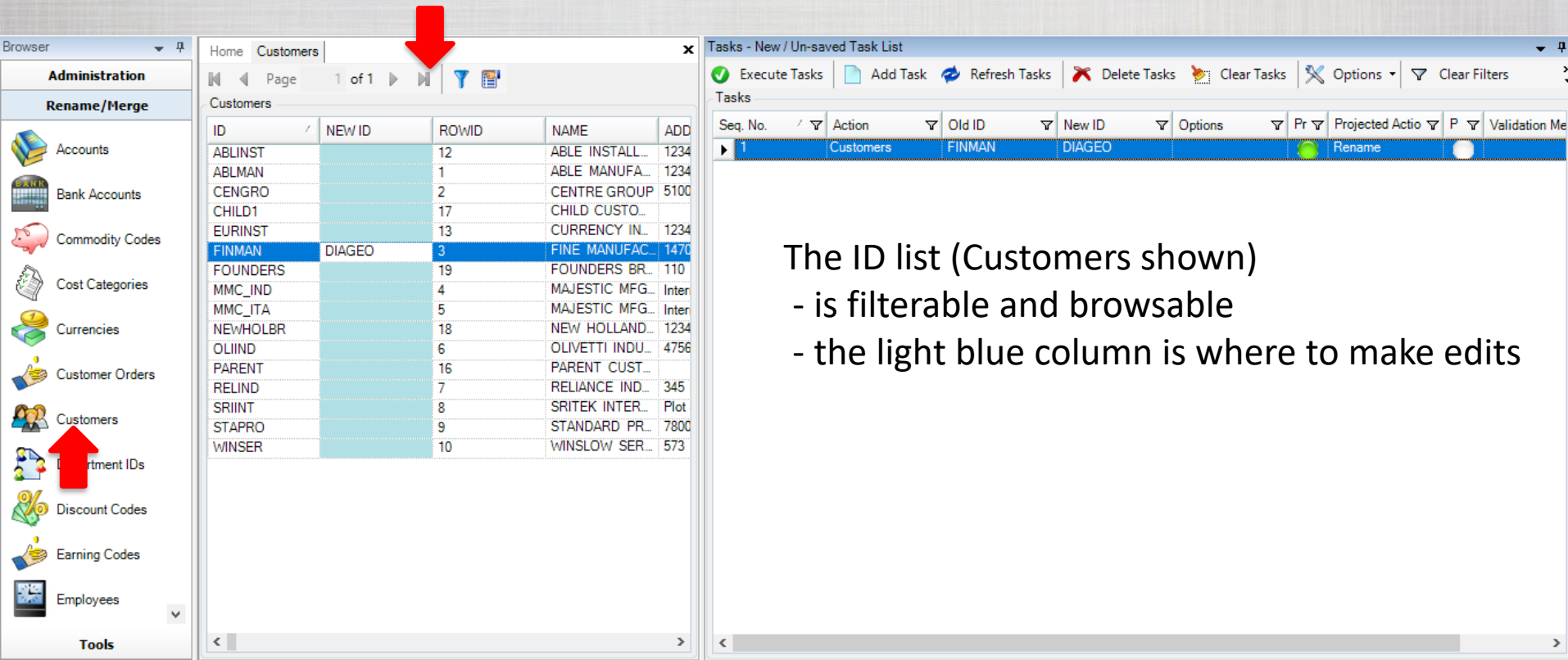
Tasks

Seq. No.	Action	Old ID	New ID	Pr	Options	Projected Actio	P	Validation Me
----------	--------	--------	--------	----	---------	-----------------	---	---------------





# Rename and Merge – Build a Task List



The screenshot displays the Truefit software interface. On the left is a navigation sidebar with a 'Rename/Merge' section. The main window shows a 'Customers' table with columns for ID, NEW ID, ROWID, NAME, and ADD. A red arrow points to the 'Customers' menu item in the sidebar. Another red arrow points to the 'Customers' table header in the main window. To the right, a 'Tasks - New / Un-saved Task List' window is open, showing a task to rename 'FINMAN' to 'DIAGEO'. The task list table has columns for Seq. No., Action, Old ID, New ID, Options, Pr, Projected Actio, P, and Validation Me.

ID	NEW ID	ROWID	NAME	ADD
ABLINST		12	ABLE INSTALL...	1234
ABLMAN		1	ABLE MANUFA...	1234
CENGRO		2	CENTRE GROUP	5100
CHILD1		17	CHILD CUSTO...	
EURINST		13	CURRENCY IN...	1234
FINMAN	DIAGEO	3	FINE MANUFAC...	1470
FOUNDERS		19	FOUNDERS BR...	110
MMC_JND		4	MAJESTIC MFG...	Inter
MMC_JTA		5	MAJESTIC MFG...	Inter
NEWHOLBR		18	NEW HOLLAND...	1234
OLIIND		6	OLIVETTI INDU...	4756
PARENT		16	PARENT CUST...	
RELIND		7	RELIANCE IND...	345
SRIINT		8	SRITEK INTER...	Plot
STAPRO		9	STANDARD PR...	7800
WINSER		10	WINSLOW SER...	573

Seq. No.	Action	Old ID	New ID	Options	Pr	Projected Actio	P	Validation Me
1	Customers	FINMAN	DIAGEO			Rename		

The ID list (Customers shown)

- is filterable and browsable
- the light blue column is where to make edits

# Rename and Merge – Build a Task List

Browser

Administration

Rename/Merge

Accounts

Bank Accounts

Commodity Codes

Cost Categories

Currencies

Customer Orders

Customers

Department IDs

Discount Codes

Earning Codes

Employees

Tools

Home Customers

Customers

ID	NEW ID	ROWID	NAME	ADD
ABLINST		12	ABLE INSTALL...	1234
ABLMAN		1	ABLE MANUFA...	1234
CENGRO		2	CENTRE GROUP	5100
CHILD1		17	CHILD CUSTO...	
EURINST		13	CURRENCY IN...	1234
FINMAN	DIAGEO	3	FINE MANUFAC...	1470
FOUNDERS		19	FOUNDERS BR...	110
MMC_JND		4	MAJESTIC MFG...	Inter
MMC_JTA		5	MAJESTIC MFG...	Inter
NEWHOLBR		18	NEW HOLLAND...	1234
OLIIND		6	OLIVETTI INDU...	4756
PARENT		16	PARENT CUST...	
RELIND		7	RELIANCE IND...	345
SRIINT		8	SRITEK INTER...	Plot
STAPRO		9	STANDARD PR...	7800
WINSER		10	WINSLOW SER...	573

Tasks - New / Un-saved Task List

Execute Tasks Add Task Refresh Tasks Delete Tasks Clear Tasks Options Clear Filters

Tasks

Seq. No.	Action	Old ID	New ID	Options	Pr	Projected Actio	P	Validation Me
1	Customers	FINMAN	DIAGEO			Rename		

Tasks are collected in the Task Pane  
And are executed only when commanded  
Tasks are pre-validated by Rename



# Rename and Merge – Build a Task List

Tasks - New / Un-saved Task List

Execute Tasks Add Task Refresh Tasks Delete Tasks Clear Tasks Options Clear Filters Manage Task List

Tasks

Seq. No.	Action	Old ID	New ID	Options	Pr	Projected Actio	P	Validation Message
1	Customers	FINMAN	DIAGEO			Rename		

# Rename and Merge – Build a Task List

The screenshot displays two windows from the Truefit software. The left window shows a 'Customers' table with columns: ID, NEW ID, ROWID, NAME, and ADD. A red arrow points to the 'ABLMAN' entry in the 'NEW ID' column. The right window shows a 'Tasks - New / Un-saved Task List' with columns: Seq. No., Action, Old ID, New ID, Options, Pr, Projected Actio, P, and Validation Me. A red arrow points to the 'Merge' task in the 'Tasks' list.

ID	NEW ID	ROWID	NAME	ADD
ABLINST	ABLMAN	12	ABLE INSTALL...	1234
ABLMAN		1	ABLE MANUFA...	1234
CENGRO		2	CENTRE GROUP	5100
CHILD1		17	CHILD CUSTO...	
EURINST		13	CURRENCY IN...	1234
FINMAN	DIAGEO	3	FINE MANUFAC...	1470
FOUNDERS		19	FOUNDERS BR...	110 I
MMC_JND		4	MAJESTIC MFG...	Interr
MMC_JTA		5	MAJESTIC MFG...	Interr
NEWHOLBR		18	NEW HOLLAND...	1234
OLIIND		6	OLIVETTI INDU...	4756
PARENT		16	PARENT CUST...	
RELIND		7	RELIANCE IND...	345 &
SRIINT		8	SRITEK INTER...	Plot i
STAPRO		9	STANDARD PR...	7800
WINSER		10	WINSLOW SER...	573

Seq. No.	Action	Old ID	New ID	Options	Pr	Projected Actio	P	Validation Me
1	Customers	FINMAN	DIAGEO		●	Rename	○	
2	Customers	ABLINST	ABLMAN		●	Merge	○	

A “rename” is when the New ID is unique  
A “merge” is when the New ID is one that already exists in your data

# Rename and Merge – Build a Task List

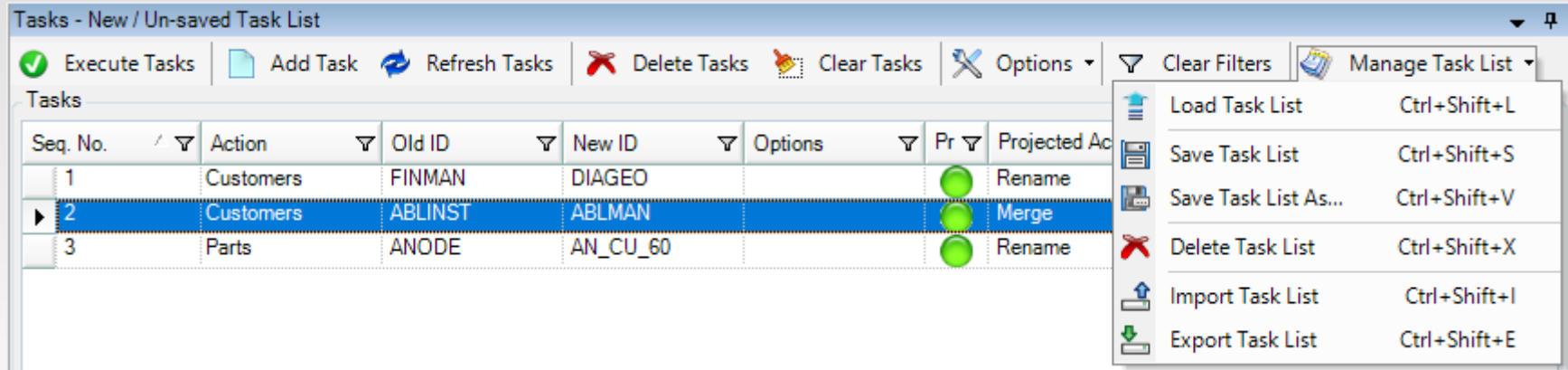
The screenshot displays the Truefit software interface. On the left is a navigation pane with categories like Administration, Rename/Merge, Bank Accounts, Commodity Codes, Cost Categories, Currencies, Customer Orders, Customers, Department IDs, Discount Codes, Earning Codes, Employees, and Entities. The main window is split into two panes. The left pane shows a table of 'Parts' with columns: ID, NEW ID, STOCK\_UM, ROWID, and D. The right pane shows a 'Tasks - New / Un-saved Task List' with columns: Seq. No., Action, Old ID, New ID, Options, Pr, Projected Actio, P, and Validation Me. A red arrow points to the 'Parts' tab in the top navigation bar. Another red arrow points to the 'Merge' task in the 'Tasks' list, which is highlighted in blue. The 'Tasks' list contains three tasks: 1. Customers (FINMAN to DIAGEO), 2. Customers (ABLINST to ABLMAN), and 3. Parts (ANODE to AN\_CU\_60).

ID	NEW ID	STOCK_UM	ROWID	D
0.75 OD CU 60		EA	46	0.
02-FABRICATE...		EA	40	F.
03-PURCHASE...		EA	39	P
04-PURCHASE...		EA	41	P
05-FABRICATE...		EA	42	F.
1/4X3ANGL		10_FT_LEN	2	1/
A1-FP-600		EA	38	T
ANODE	AN_CU_60	EA	36	M
CRS .020 4 X 4		EA	3	C
CRS .300 X 3.50		LBS	4	C
MMC_FM0001_...		EA	6	S
MMC-FM0001		EA	5	H
MMT-1996-BCV...		EA	9	B.
MMT-1996-BCV...		EA	10	B.
MMT-1996-C05		EA	11	C
MMT-1996-C15		EA	12	C
MMT-1996-DM-B		EA	14	D
MMT-1996-HCH		EA	15	H
MMT-1996-HS		EA	16	H
MMT-1996-KPD		EA	17	K
MMT-1996-RCV		EA	18	R
MMT-1996-RCV...		EA	19	R
MMT-1996-SCR		EA	20	1/
MMT-1996-TRM		EA	21	T
MMT-1996-TRM...		EA	22	T

Seq. No.	Action	Old ID	New ID	Options	Pr	Projected Actio	P	Validation Me
1	Customers	FINMAN	DIAGEO		●	Rename	○	
2	Customers	ABLINST	ABLMAN		●	Merge	○	
3	Parts	ANODE	AN_CU_60		●	Rename	○	

Tasks can be from different objects

# Rename and Merge – Export Tasks



The screenshot shows a software window titled "Tasks - New / Un-saved Task List". The window has a toolbar with buttons for "Execute Tasks", "Add Task", "Refresh Tasks", "Delete Tasks", "Clear Tasks", "Options", "Clear Filters", and "Manage Task List". Below the toolbar is a table with the following data:

Seq. No.	Action	Old ID	New ID	Options	Pr	Projected Ac
1	Customers	FINMAN	DIAGEO		●	Rename
2	Customers	ABLINST	ABLMAN		●	Merge
3	Parts	ANODE	AN_CU_60		●	Rename

A context menu is open over the second row, showing the following options:

- Load Task List (Ctrl+Shift+L)
- Save Task List (Ctrl+Shift+S)
- Save Task List As... (Ctrl+Shift+V)
- Delete Task List (Ctrl+Shift+X)
- Import Task List (Ctrl+Shift+I)
- Export Task List (Ctrl+Shift+E)




Export a Task List to let other people collaborate in Excel

Useful for Large sets of data

Can be imported to either Test or Live groups, saving the time to recreate the list


# Rename and Merge - Execution

Tasks - New Un-saved Task List


 Execute Tasks |  Add Task |  Refresh Tasks

Seq. No.	Action	Old ID
1	Customers	FINMAN
2	Customers	ABLINST
3	Parts	ANODE

Task Run Information

 Database Back-up: Please make sure that you have a database back-up for all connected databases.

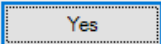
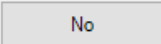
Cancel Process: You may cancel at any time, however the executing task will complete before the process exits.

 Caution: The task option for exact value match will take into account values containing white space when checked!

Task Option Settings:

- Process Tasks with Warnings
- Exact Value Match (includes white-space)
- Validate Integrity on Enable
- Lock Databases
- Process Custom Tables
- Perform Pre-Validations
- Delete Engineering Masters

Are you sure you want to execute the tasks at this time?

 Yes  No

When you are ready to run your tasks

Back up your data

Do not alter the Task Option settings


# Rename and Merge - Execution

Visual Rename and Merge - Progress


**Executing task 1 of 3**

**Customers: FINMAN to DIAGEO**

Individual Task Progress:

Database ID	Action	Progress
VMFG9_MS	Compiling list of triggers for: Customers	

Overall Task List Progress:





# Rename and Merge – Tasks Executed

Browser Home Customers Parts

Administration  
Rename/Merge

Bank Accounts  
Commodity Codes  
Cost Categories  
Currencies  
Customer Orders  
Customers  
Department IDs  
Discount Codes  
Earning Codes  
Employees  
Entities  
Tools

ID	NEW ID	STOCK_UM	ROWID
0.75 OD CU 60		EA	46
02-FABRICATE...		EA	40
03-PURCHASE...		EA	39
04-PURCHASE...		EA	41
05-FABRICATE...		EA	42
1/4X3ANGL		10_FT_LEN	2
A1-FP-600		EA	38
AN_CU_60		EA	36
CRS .020 4 X 4		EA	3
CRS .300 X 3.50		LBS	4
MMC_FM0001_...		EA	6
MMC-FM0001		EA	5
MMT-1996-BCV...		EA	9
MMT-1996-BCV...		EA	10
MMT-1996-C05		EA	11
MMT-1996-C15		EA	12
MMT-1996-DM-B		EA	14
MMT-1996-HCH		EA	15
MMT-1996-HS		EA	16
MMT-1996-KPD		EA	17
MMT-1996-RCV		EA	18
MMT-1996-RCV...		EA	19
MMT-1996-SCR		EA	20
MMT-1996-TRM		EA	21
MMT-1996-TRM...		EA	22

Tasks - New / Un-saved Task List

Execute Tasks Add Task Refresh Tasks Delete Tasks Clear Tasks Options Clear Filters

Seq. No.	Action	Old ID	New ID	Options	Pr	Projected Actio	P	Validation Me
1	Customers	FINMAN	DIAGEO			Succeeded		
2	Customers	ABLINST	ABLMAN			Succeeded		
3	Parts	ANODE	AN_CU_60			Succeeded		

When tasks are done  
All Tasks show “succeeded”  
And New ID is shown in your data

# Rename and Merge

## Technical Matters in Brief

- Rename requires a unique lock on the database – no logins or external SQL connections permitted
- Rename will not connect if this lock test fails – for your safety!
- Back up, Back up, Back up your data
- Execution time for a task list depends on how many tasks, how big the database is, what object you're working on, and your hardware
- Thorough testing will guide you on how long the process will take, and safely let you see the impact of your changes

# Rename and Merge

Thank you for attending!

Any questions?