

GSS Swaps

Why run swaps in GSS?

Customers run into scenarios where they are looking to swap out key master data stemming from standardizing naming conventions (general best practice or merger driven), consolidation of master data or just data correction.

This is not possible manually because of this being the master key information and the number of tables that needs to be updated. To make this possible we have developed a script that will allow you to swap this information out.

What are the different types of SWAPs that GSS supports?

We support swapping out five types of master data.

- **Customer Number Swap:**
 - The Customer Swap changes naming conventions or merges Customers. This is going to update the Customer Master, Sales Orders, Shipments, AR History, etc.
- **Employee Number Swap:**
 - The Employee Swap changes naming conventions but cannot merge employee numbers. This is going to update the Employee Master, Payroll Tables, Job Detail, etc.
- **GL Account Swap:**
 - The GL Swap changes naming conventions but cannot merge GL Accounts. This is going to update GL Detail, GL Balances, GL Budgets, Sales Orders, Purchase Orders, GL History, etc.
- **Part Number Swap:**
 - The Part Swap changes naming conventions, adds revs, removes revs, adds locations, removes locations, or merges parts with similar numbers. This is going to update Inventory, Work Orders, Sales Orders, Purchase Orders, Inventory History, etc.
- **Vendor Number Swap:**
 - The Vendor Swap changes naming conventions or merges Vendors. This is going to update the Vendor Master, Purchase Orders, PO History, AP History, etc.

Is running the GSS Swap a simple task?

The short answer is No. Given that we are updating primary keys in all tables, it is a very complex process which is further complicated by the amount of data (increases with the number of years you've been in GSS) and the number of key records being swapped. Some swaps support merges. This increases the complexity and runtime.

A swap can take anywhere between 2 hours to more than 8 hours to run per company code. We direct customers to first run it in the TST system, validate the changes and then run it in the live system. For the company code that you are running it against, everyone should be logged off global shop and all unattended services should be closed (Online update, Wire Poll Etc.). Depending on the scope, complexity, and type of swap this can be an exercise that could span over multiple weeks or even months.

Can you run the swap on your own without GSS support?

In theory, yes. The program is built to have a simple user interface and is easy to run. Though at times, the script runs into issues because of data or the environment. Once you run into these issues, it is almost impossible for you to run this on your own and most often than not, you will need to engage with us through paid VT sessions @ \$200 an hour to run the SWAP for you (both in test and in live). The live session would need to be run when everyone is off the system and if that is beyond the GSS support hours, we would charge off hours support rate @ \$300 an hour for those sessions.

How do we request for the swap files?

You may place a request using the following smartsheet link:

<https://app.smartsheet.com/b/form/1b0ad25e4b884454a061d0b502d8e148>

If you have any questions, you may email CIDevOps@gssmail.com

This document will also walk you through how to setup and run the swap once you have received the SWAP files.

How should we plan the SWAP run?

Always run the SWAP in your TEST company code first. Its best to make sure that you have copied over data from the LIVE company to the TEST company so you can validate it against actual data.

The TEST Swap can be done during the weekday. This run will largely define if you will be needing global shop support and will also help validate if the SWAP is doing exactly what is expected. If you run into issues it could be issues with the script in which case please place a request using the [smartsheet link](#) so we can coordinate a time to troubleshoot. If it is an issue with the data or your environment, you wont be able to run the swap and will need to schedule a VT with us to run the SWAP(both TEST and LIVE). You will be using the [smartsheet link](#) to request the respective TEST and LIVE Swap individually.

A typical request to run would involve the following steps.

- Request files using the [smartsheet link](#)

- In the weeks running up to the SWAP, you would compile the upload file in the format specified in the document further below.
- Run the TEST Swap during a weekday
 - If you run into an issue, Send an email to CIDevOps@gssmail.com with information of the issue and screenshots. It would be helpful to report it using the [smartsheet link](#) just so we don't have to track it via email.
 - If deemed to be something that is not a quick fix and needs our help with running it we will have you request a TEST Swap VT using the [smartsheet link](#). If this is the case even the LIVE run will need to be requested the same way once we successfully get through the TEST Run.
- If no issue, Run the LIVE swap on a weekend following the TEST run when no one is in the system.
 - If you run into issues with the Live Run(very rare if you have had a successful test run), you will need to schedule the live run with us as a VT using the [smartsheet link](#). You will need to revert from backups, and we will schedule the live run VT with us at our next availability.
- Validate the SWAP before the beginning of the following week so the system is ready.
- This could take multiple weeks just because of the complexity and restrictions in running the SWAP. Please be prepared for a major investment of time and resources.

***** The VT support covers just setup, running and troubleshooting the swap program. There are pre and post tasks that your IT team will need to perform in terms of restarting the server and ensuring all unattended programs are closed. We will also need to be able to contact them for access to the server.**

Post Swap validation and spot checks will need to be done by the customer. The customer may need to engage with a GSS Accounting consultant before running the GL swap to understand what they need to check and perform post Swap.

Normal VT rate during regular hours \$200 an hour.

Off support hours VT rate \$300 an hour.

Do I need anything else to run the swap?

Yes, to upload the records, you will need to run the upload portion of the swap program from a terminal/client that has excel installed. The upload can be run on a separate system which has Excel but it is strongly recommended that you run the actual swap from the server.

How to setup and run GSS Swaps?

1. Download:

- a. GSS_Swaps.zip(sent via email after request is placed using the [smartsheet link](#))
- b. Unzip the folder and place all files into your ..\Global\PLUGINS\GAB\GAS directory
- c. Email: Unzip GSS_Swap_License.zip and place the file in the same directory as 1b.

2. Setup Custom GAB Hook:

- d. Log into Global Shop as SUPERVSR or as an Admin
- e. Go to System Support > Administration > GAB Script Hook Maintenance
- f. Click New Hook and for Hook Description enter “**GSS Swaps**”
- g. Click New Seq and browse for **GSS_Swaps.g2c**
- h. Click Save Seq and Save Hook

3. Create a Custom Menu:

- i. Go to System Support > Admin, Right-Click and select Add Custom Menu Item
- j. Type: GAB
- k. Browse for the Custom GAB Hook you created above at Step 2
- l. Make the Title the same as the Hook Description and give permissions to Admins only or just SUPERVSR.
- m. System Support > Administration > GSS Swaps**

4. Run GSS Swaps:

Pre-Swap

- a. Ensure users are out of the system and all unattended programs are closed for that company code (Online Update, WirePoll etc.)
- b. If running in a LIVE company code, you will need to restart the server to ensure all connections are closed.
- c. We advise that you run GSSCompare.exe located in the ..\Global\Plugins folder for all tables.
- d. If running for a large set of records, we advise that you also rebuild your files before the SWAP.

Running the Swap

- a. Run, System Support > Administration > GSS Swaps
- b. Select a Swap to Run from the dropdown list
 - i. Customer Number Swap
 - ii. Employee Number Swap
 - iii. GL Account Swap – [Special Notes](#)
 - iv. Part Number Swap
 - v. Vendor Number Swap
- c. Drag and drop your upload file or select it from the browser – [File Layouts](#)
- d. Click Upload to upload the spreadsheet
 - vi. Under the file path there is a last upload status showing the last time a spreadsheet was uploaded and the number of records. Double-click “Last Upload:” to preview the current loaded data. You will need to upload a file from a system/terminal that has excel installed.
 - vii. Once data is uploaded, you will have it available for multiple instances of the swap run until you upload a new set of files.
- e. At the very bottom in Red is a disclaimer repeating the effects of running the selected swap.
- f. If you are running this in a Test or Play Company, you can check “**Override User Check**” to ignore logged in users. When you run this live, you will want to remove the check, so the program verifies that you are the only user logged in before running the selected swap.
- viii. There are instances where because of residual files and locks, this may cause issues and in cases like this, if you are sure that there is no one in the system and you have restarted the server before running the swap you may leave the “**Override User Check**” option is checked.
- g. Click “Run Swap”
 - a. Your update will run with a status bar to show progress and at the end, you will be prompted with completion and to verify your data. For errors reference, [Troubleshooting and Errors](#).

Post Swap

- b. Before having the users connect and restarting online update, perform post run actions (GL swap) and validation (Spot checks, Reports etc.).
- c. If everything is validated to be correct, please launch all unattended programs (Online update, Wire Poll Etc.)
- d. If you see any issues, you may revert to the back up files that are created under ..\Global\FILES\GSSSwap\”Selected Swap Name”\Backups. The ‘Backups’ folder will contain a folder with Company Code, Date and Time as the folder name and all files affected in the process will be here. So, if the swap stops running due to error or you have determined that the swap has not run successfully and you need to revert before having users in the system, you can place these files back into the FILES folder to rollback.

**** You will only need to revert in LIVE. Your test run can be left as is so we can trouble shoot those issues.

File Layouts

Customer Number Swap

- a. 3 Columns (Old, New, UpdateOrder) ***All Columns are needed even if not used***
 - a. Old: Current Customer Numbers
 - b. New: New Customer Numbers
 - c. UpdateOrder: Set to 1 if all updates are 1 to 1
 - i. If you are going to be merging data such as going from 3 customer numbers to 1, then in the UpdateOrder column you need to select the customer you are going to want to keep master information on. Such as; Name, Address, Contacts and so on. The Customer Number with the lowest value is going to be the record that is retained from the swap. So in the example below I want to keep the information for CUST02.

Old	New	UpdateOrder
CUST01	CUST10	3
CUST02	CUST10	1
CUST03	CUST10	2

Employee Number Swap – CANNOT MERGE

- a. 3 Columns (Old, New, UpdateOrder) ***All Columns are needed even if not used***
 - a. Old: Current Employee Numbers
 - b. New: New Employee Numbers
 - c. UpdateOrder: Set to 1

GL Account Swap – CANNOT MERGE

- a. 3 Columns (Old, New, UpdateOrder) ***All Columns are needed even if not used***
 - a. Old: Current GL Account Number
 - b. New: New GL Account Numbers
 - c. UpdateOrder: Set to 1

**** Please review [special notes](#) for GL Swap. A lot of time, the GL swap will require additional consultant assistance for prep and post run action items. Its always advised to run the trial balance and any associated reports first before running the swap for a before after comparison.

Part Number Swap

- a. 3 Columns (Old, OldLoc, New, NewLoc, UpdateOrder) ***All Columns are needed even if not used***
 - a. Old: Current Part Numbers
 - b. OldLoc: If you are using locations make sure to list them with the parts
 - c. New: New Part Numbers

- d. NewLoc: If you need to change, add, remove locations make sure to list them here with the corresponding parts
- e. UpdateOrder: Set to 1 if all updates are 1 to 1
 - i. If you are going to be merging data such as going from 3 Part numbers to 1, then in the UpdateOrder column you need to select the Part you are going to want to keep master information on. Such as; Description, Product Line, Lead Time and so on. The Part Number with the lowest value is going to be the record that is retained from the swap. So in the example below I want to keep the information for PART02.

Old	OldLoc	New	NewLoc	UpdateOrder
PART01		PART10		3
PART02	01	PART10		1
PART03	02	PART10		2

Vendor Number Swap

- a. 3 Columns (Old, New, UpdateOrder) ***All Columns are needed even if not used***
 - a. Old: Current Vendor Numbers
 - b. New: New Vendor Numbers
 - c. UpdateOrder: Set to 1 if all updates are 1 to 1
 - i. If you are going to be merging data such as going from 3 Vendor numbers to 1, then in the UpdateOrder column you need to select the Vendor you are going to want to keep master information on. Such as; Name, Address, Contacts and so on. The Vendor Number with the lowest value is going to be the record that is retained from the swap. So in the example below I want to keep the information for VEND02.

Old	New	UpdateOrder
VEND01	VEND10	3
VEND02	VEND10	1
VEND03	VEND10	2

Troubleshooting and Errors

- 1- If you run into an error you can view the Swap Log in ..\Global\FILES\GSSSwap\"Selected Swap Name\"Logs and the log will have today's date in the file name for reference.
- 2- If you are unable to resolve the issue, if in live, roll the files back. You may revert to the backup files that are created under ..\Global\FILES\GSSSwap\"Selected Swap Name\"Backups. The 'Backups' folder will contain a folder with Company Code, Date and Time as the folder name and all files affected in the process will be here. So, if the swap stops running due to error or you have determined that the swap has not run successfully and you need to revert before having users in the system, you can place these files back into the FILES folder to rollback. If this is in TEST please leave as is. Also email CIDevOps@gssmail.com with information on the issues you ran into and report it using the [smartsheet link](#)

GL Account Swap Special Notes:

- 1- After completion, you will have to go into the options below and change the GL Accounts Manually to the newly converted accounts.
 - a. System Support > Administration > Company Options (Standard) > Accts Payable Table Maint
 - i. Account Maint. – Accts Payable
 - ii. Account Maint. – Discounts Taken
 - iii. Account Maint. – Accured Payables
 - b. System Support > Administration > Company Options (Standard) > Accts Receivable Table Maint
 - i. Account Maint. – Accts Receivable
 - ii. Account Maint. – Discount
 - iii. Account Maint. – Exchange Variance
 - iv. Account Maint. – Exclusion
 - v. Account Maint. – Freight
 - vi. Account Maint. – Intercompany
 - vii. Account Maint. – Sales
 - viii. Account Maint. – Tax Accounts
 - ix. Account Maint. – Customer Deposit
 - c. System Support > Administration > Company Options (Standard) > Inv Acct Options
 - d. Check Product Lines and other places where the GL Account should be updated