Oracle® myinventory Release Notes Reference Library

Release v8.4.3

March 2015

Contents

Preface

This myinventory Reference Library document describes new features and enhancements for myinventory.

Audience

This document is intended for all users of Oracle myinventory product.

Related Documents

For more information, see the following documents in the Oracle Help Center:

- v8.4.3 Release Notes

Customer Support

To contact Oracle Customer Support, access My Oracle Support at the following URL:

https://support.oracle.com

When contacting Customer Support, please provide the following:

- Product version and program/module name
- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

myinventory

New Cost Centers added to cost center filter

New cost centers that you create are now added to the cost center filter if the **C/S Filter** is active.

About the Cost Center Filter

The Cost Center Filter or C/S Filter determines which cost centers and stores you can access.

Creating cost centers

1. Navigate to *myinventory* | *Master Data* | *Cost Centers*.
2. Click **New**.
3. Enter the **Cost Center** name and **Number**.
4. In **Assigned To**, enter the parent level of the cost center.
5. Define/select any other fields and options. See **Cost Center Creation fields and options** for descriptions of each field/option available in the Create Cost Center page.
6. Click **Save**.

Viewing cost centers

1. Navigate to *myinventory* | *Maintenance.*
2. Click **Cost Centers and Locations**.

Activating the C/S Filter and assigning cost centers to users

1. Navigate to *myinventory* | *Maintenance* | *User Management*.
2. Select a user from the list.
3. Select **C/S Filter**.
4. Click the  button to the right of the **C/S Filter** field.
5. Place the curser on the **Cost Center** field and press **Enter**.
6. Select one or more cost centers.
7. Click **Add**.
8. Click **OK** to exit the Add Cost Centers dialog box.
9. Click **Save**.

Cost Center Creation fields and options

Field or Option	Description
Number	This is the number that the cost center is identified by.
Account (Cost Center)	Applies to GL and A/P accounts. The cost center's account number is in the Accounts Payable System.
Assigned To	This is the parent level of the current cost center (location).
Default Main Store	This is the default store that the cost center receives goods from.
Taxes	Shows the types of taxes used at this cost center.
Closed at	Shows when the last period count was booked.
Close Cost Center/Store on Stock Take	Select this option to prevent users from editing or booking new documents in the closed period.
Exclude from Central Purchasing	Select this option to exclude this cost center or store from using central purchasing.
Using Transit	Select this option if a booked transfer has to be accepted of declined by the receiving store.
Warehouse	Select this option if this cost center or store is a warehouse.
Advanced Storage Location	Select this option if you want to allow Advanced Storage Locations to be used by this cost center.
Enable Production on Transfer	When this option is selected, the system allows production and transfer in a single step. When a production item is transferred, the system requests for the number of items to be produced for this transfer and increases the stock on hand accordingly.
Allow to use Production Module	If the option **Enable Production on Transfer** is enabled, this cost center can no longer be selected in the Production module. Select this option if you want the cost center to become available in the Production module again.
Use Sales Price for Transfer	Select this option if you want the cost center to use the sales price entered in *Master Data* ǀ *Items* instead of the calculated cost price.
Automatic Yield	Select this option to activate the Automated Yield process. A Scheduler job ensures that items defined as Automatic Yield are 'exploded' in the ingredients defined in the Yield Container.
Type	Cost Center or Store. Cost center is selected by default.
Period Control	Defines the time the inventory should run for this cost center or store. If, for example, **Month** is selected, you cannot post transactions of the current month to the previous month. That is, all transactions must be posted at the end of the month. Only users with the access right **Booking in last Period Allowed** can book in previous periods.

Field or Option	Description
	This function is only active if **Close Cost Center/Store on Stock Take** is *deselected*. None: The store is not closed until an inventory is performed. Year: Only posts till December 31st are allowed. Half Year: Only posts till June 31th and December 31st are allowed. Quarter: Only posts in the current quarter are allowed. Month: Only posts in the current month are allowed. Week: The start of the week is defined by the system. After the weekend, only posts in the current week are allowed.

About Central Ordering

Central Ordering shows all B2B Orders and their progress. This enables you to see:

- What stores have placed orders
- Which vendors have received the orders

Granting users access to the Central Ordering module

1. Navigate to *myinventory* | *Maintenance* | *User Management*.
2. Select a user from the list.
3. Click **Manage User Right**.
4. Under Module Group, click **Purchase**.
5. Under Purchase Orders, select **Purchase Manager for prepared Orders**.
6. Click **Save**.

About Menu Item Auto Link

The Menu Item Auto Link module is where you create a master cost center and assign (link) it to sub cost centers. By creating a master and assigning sub cost centers, you make linking menu items to inventory items or recipes more efficient as menu item linking performed on the master cost center can be copied to its sub cost centers by creating a Scheduler job. This eliminates the need to individually link menu items to similar cost centers.

Creating a master cost center

1. Navigate to *myinventory* | *Maintenance* | *Menu Item Auto Link*.
2. Click **Create Master Cost Center**.
3. Click **New**.
4. Select the cost center that you want to be used as the master store.
5. Click **OK**.
6. Click **Save**.

Assigning cost centers to a master cost center

1. Navigate to *myinventory* | *Maintenance* | *Menu Item Auto Link*.
2. Click **Assign Cost Center**.
3. Select a master cost center.
4. From the Source list, select a cost center
5. Click **Add ->>**.
6. Repeat steps 6-7 until you have all the cost centers that you want to assign to the selected master store in the Assigned list.
7. Click **Save**.

Viewing and/or deleting master cost centers

1. Navigate to *myinventory* | *Maintenance* | *Menu Item Auto Link*.
2. Click **Master Cost Center**.
3. If you want to delete a master cost center:
    a. Select the master cost center you want to delete.
    b. Click **Delete**.

Viewing cost centers assigned to a master

1. Navigate to *myinventory* | *Maintenance* | *Menu Item Auto Link*.
2. Click **Assigned Cost Center.**

Creating a job to copy Menu Item Links from master cost center to sub cost centers

1. Navigate to *myinventory* | M*aintenance*| *Scheduler.*
2. Click **Create Job**.
3. Select **Menu Item AutoLink** as the Job Type.
4. Click **OK**.
5. Select the Start Date and Start Time to run the job.
6. If you want the job to run only once at the selected date and time:
    a. Select **Run once**.
7. If you want the job to run on a regular basis:
    a. Select **Periodically, every** and define how often the job should run.
8. Click **Save**.

About Use Cost Center Relationships in List Management

Use Cost Center Relationships in List Management is a user right that enables users to create, edit, and save Requisition and Transfer lists in the List Management module for cost centers that are not assigned to them in their C/S Filter. When this right is granted, the **Request From** filter will show the user's default cost center as well as all cost centers linked to the default cost center in the Cost Center Area module.

Assigning the user rights to create, edit, and save transfers for cost centers not in the C/S Filter

1. Navigate to *myinventory*| *Maintenance* | *User Management.*
2. Select a user from the list.
3. Click **Manage User Right**.
4. Click the **System** Module Group.
5. Under List Management, select **Use Cost Center Relationships in List Management**.
6. Click **Save**.

Deleting multiple recipes

1. Navigate to *Recipes.*
2. Select a recipe.
3. Select the ingredients that you want to delete.
4. Click **Delete Ingredients**.
5. Click **OK** to confirm the deletion.

About manual inventory date selection

Manual inventory date selection makes the inventory **Date** field mandatory and leaves it unpopulated for you to select. You cannot create an inventory count until a date is selected; the **Create** button is grayed out and only becomes active when a date is selected.

Supported inventory modules

- Inventory by Count Cycle
- Inventory by List
- Blank Inventory

Why enforce manual inventory date selection?

The inventory date cannot be changed once an inventory count it created. If you need to change the inventory date, you have to delete the existing inventory, recreate the inventory count with the new date and reenter the data.
Enforcing manual inventory date selection forces users to validate and select the correct date and reduces the chances of creating a count for an incorrect date.

Rules when manually selecting an inventory date

- You cannot select a backdate.
- Depending on the Count Cycle template you have chosen:
    - If you have selected **End of Month,** you cannot select a date in the middle of the month.
    - If you have selected **Daily/Weekly** and have for example only selected Wednesday, you cannot select any Monday.

- If you have selected **Financial Period,** you cannot select a date outside of the selected financial period.

Enabling manual inventory date selection for an organization

1. Navigate to *myinventory* |*Maintenance* | *Settings* | *Inventory*.
2. Select **Do not Populate Date in Inventory Counts by Default**.
3. Click **Save**.

About manual inventory date selection

Manual inventory date selection makes the inventory **Date** field mandatory and leaves it unpopulated for you to select. You cannot create an inventory count until a date is selected; the **Create** button is grayed out and only becomes active when a date is selected.

Supported inventory modules

Manual inventory date selection is enforced in the following modules:

- Inventory by Count Cycle
- Inventory by List
- Blank Inventory

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  - If you have selected **Financial Period,** you cannot select a date outside of the selected financial period.

Enabling manual inventory date selection for an organization

1. Navigate to *myinventory* |*Maintenance* | *Settings* | *Inventory*.
2. Select **Do not Populate Date in Inventory Counts by Default**.
3. Click **Save**.

About Menu Item Linking

It is through linking menu items that myinventory accurately depletes the stock-on-hand of inventory items. You can link one menu item to multiple inventory items or recipes. That is, if an organization has a recipe that is sold multiple ways, you can link the menu item to different menu levels of that recipe.

For example, a restaurant sells French fries in two different sizes: small and large. The restaurant has created a recipe for French fries, but the recipe is only applicable for a small size. A large fries is equal to two small fries. By linking the recipes and knowing the ratio, myinventory determines that when a large fries is sold, two portions of the small fries recipe must be depleted in order to account for the sale.

About Menu Item Linking with a negative quantity

Instead of creating separate recipes for items with and without condiments, menu item linking allows you to use the same recipe created for adding the condiment but with a negative quantity.

For example, imagine you have a menu item for cheeseburger that is linked to the cheeseburger recipe. The cheeseburger recipe contains:

- 1 ea. patty
- 1 ea. bun
- 1 ea. slice cheese
- 1 oz. ketchup
- 1 oz. mustard
- 1 oz. onions

A server rings in:

- Cheeseburger NO Ketchup.

Since the recipe for cheeseburger depletes 1 oz. of ketchup, you need to add it back so that ketchup is not depleted. Therefore, you would link the No Ketchup modifier to the ketchup 1 oz. recipe with a negative 1 quantity (-1).

Linking a menu item with a negative quantity

To link menu items with a negative quantity:

1. Navigate to *Menu Item Linking.*
2. Search for the menu item that you want to link (for example, No Ketchup).
3. From the search results, select the menu item by clicking the menu item hyperlink.
4. Click **Link Recipe**.
5. Select the recipe (for example, ketchup).
6. Click **OK**.
7. Enter **-1** for the **QTY**.
8. Click **OK**.

About recipe quantity

The quantity of a recipe is the portion of the recipe you want to request or transfer.

For example, if the recipe is for a cup of soup and a bowl of soup equals two cups of soup and you are requesting a bowl of soup, you should request two portions of the recipe.

Creating a Transfer From request with recipes

1. Navigate *Transfer From.*
2. Enter the **Request From Cost Center**.
3. Select the date.
4. Enter any pertinent information in **Reference**.
5. Click **Create**.
6. Click the transfer document you just created to enter the Transfers Detail page.
7. Click **Add Recipe**.
8. Enter the recipe name.
9. If you want to view a list of all recipes in myinventory:
    a. Place the cursor in the **Recipe** field and press Enter.
    b. Choose the recipe you want to transfer.
    c. Click **OK**.
10. Enter the quantity of portions of the recipe you want to transfer.
11. Enter any additional information you want to be included with this recipe to appear in the transfer document in the **Info** field.
12. If you want the recipe to be rounded to its nearest base unit measurement when it is being delivered:
    a. Select **Round to Units**.
13. Click **OK**.
14. Continue to add recipes or click **Cancel**.
15. Save the transfer document.

About the Forecast Out-of-Stock module

The Forecast Out-of-Stock module predicts when inventory items run out based on the Calculation Method configured for an item or item group and the past sales of those items. The module forecasts item usage for the current business date and the next 13 days. If an item is out of stock, the count of that item shows as zero while those below zero are highlighted in red.

To predict future inventory usage, a Calculate Average Usage job must be created in the Scheduler.

Granting users the right to access the Forecast Out-of-Stock module

1. Navigate to *myinventory* | *Maintenance* | *Settings*.
2. In the General tab, select **Calculate Average Usage for All Items**.
3. Navigate to *myinventory* | *Maintenance* | *User Management*.
4. Select a user from the list.

5. Click **Manage User Right**.
6. Under Module Group, click **Purchase**.
7. Select **Out-of-Stock**
8. Click **Save**.

Creating a job to calculate the average usage

1. Navigate to *myinventory| Maintenance |Scheduler*.
2. Click **Create Job**.
3. Select **Calculate Average Usage** as the Job Type.
4. Click **OK**.
5. Select the Start Date and Start Time to run the job.
6. If you want the job to run only once at the selected date and time:
    a. Select **Run once**.
7. If you want the job to run on a regular basis:
    a. Select **Periodically, every** and define how often the job should run.
8. If you want an e-mail notification to be sent each time this job executes:
    a. Select **Send E-Mail Notification**.
    b. If want notifications to be sent only if the job fails:
        i. Select **Only if Job Fails**.
    c. If you want the notifications sent only to you:
        i. Select **Job Owner**.
    d. If you want the notifications sent to all users belonging to your role:
        i. Select **Owner's Role.**
    e. If you want the notifications sent to all users in your cost center:
        i. Select **Owner's Cost Center.**
9. Click **Save**.

Viewing the forecasted inventory

1. Navigate to *myinventory | Forecast Out-of-Stock*.
2. Select a cost center.
3. If you want to see the forecast for an Item Group:
    a. Click **Item Group**.
    b. Select an item group from the list.
    c. Click **OK**.
4. If you want to see the forecast for a particular item:
    a. Click **Item**.
    b. Select and item from the list.
    c. Click **OK**.
5. For the **Delivery Date**, select the date for which you want to see the forecast.
6. Select the necessary search filters:
    a. If you only want to see out-of-stock items:
        i. Select **Out-of-Stock.**
    b. If you do not want to see out-of-stock items:
        i. Select **Ignore Out of Stock**.

   c. If you only want to see items where the stock on hand is less than the minimum amount:
      i. Select **Less than Minimum**.
   d. If you want your search result to also include inactive items:
      i. Select **Show also Inactive**.
   e. If you want the item store unit to show:
      i. Select **Display Store Unit**.
   f. If you want the item base units to show:
      i. Select **Display Base Unit**.
7. Click **Refresh**.
8. If you want to export the search results:
   a. Click **Export to Excel**.

Viewing all B2B orders

1. Navigate to *myinventory* | *Maintenance.*
2. Click **Central Ordering**.
3. If you want to filter the orders by the delivery date:
   a. Select the **Order Date**.
   b. Click **Refresh**.
4. If you want to filter the orders by the vendor:
   a. Enter a vendor's name or click **Vendor** and select a vendor from the list.
   b. Click **Refresh**.

Adding items and recipes to an inventory

You can now add items and recipes to an inventory and save the inventory count as a list from the Item Groups Detail and the Storage Location Detail pages without navigating to the Count Summary page.

Methods of creating inventory counts

- By Count Cycle
- By List
- By Blank Inventory
- By scheduling a job

Adding items/recipes to the inventory count using the Item Groups Detail page or the Storage Location Detail page

1. Navigate to *myinventory* | *Inventory* | *Suspended.*
2. Select a document.
3. Click an **Item Group** to go to the Item Groups Detail page or click a **Location** to go to the Storage Location Detail page.

4. If you want to add items the inventory:
    a. Click **Add Item(s)/Unit(s)**.
    b. Place the cursor in the **Item** field and press Enter.
    c. Select the item you want to add.
    d. Click **OK**.
    e. If you want to add additional units:
        i. Place the cursor in the **Additional Unit** field and press Enter.
        ii. Select any additional units.
        iii. Click **OK**.
    f. If you are using Advanced Storage Locations:
        i. Select a **Storage Location**.
    g. Click **OK** to complete the entry for this item.
    h. Repeat steps b-g to add more items.
    i. Click **Cancel** to exit the Add Item(s)/Unit(s) dialog box.
    j. Click **Refresh Count** to show the items you added in the Inventory Count Detail page.
5. If you want to add recipes to the inventory:
    a. Click **Add Recipe(s)**.
    b. Place the cursor in the **Recipe** field and press Enter.
    c. Select the recipe you want to add.
    d. Enter the **QTY.**
    e. Click **OK** to complete the entry for this recipe.
    f. Repeat steps a-e to add more recipes.
    g. Click **Cancel** to exit the Add Recipes dialog box.
    h. Click **Refresh Count** to show the ingredients of the recipes you added in the Inventory Count Detail page.
6. If you to save the inventory count for future use as a list:
    a. Click **Save as List.**
    b. Enter a name for the list.
    c. Click **OK**.

About Transfer From Using List

The Transfer From Using List module is where you can create a transfer request from a cost center using a previously created Transfer From list or an already existing list of products.

About Cost Center Areas

The Cost Center Areas module is where you determine which cost centers can transfer and request items from other cost centers.

For example, cost center A can transfer items to cost center B. But cost center B can only transfer and request items from cost center C**.**

Enabling the Cost Center Areas filter in the Transfers module

Caution: Do not turn on the Use Cost Center Areas privilege until cost centers are set up. If this right is turned on prematurely, sites cannot perform any transfers.

1. Navigate to *myinventory* | *Maintenance* | *User Management*.
2. Select a user from the list.
3. Click **Manage User Right**.
4. Under Module Group, click **Store**.
5. Under Transfers, select **Use Cost Center Areas**.
6. Click **Save**.

Allowing users to manage cost centers for the Transfers module

1. Navigate to *myinventory* | *Maintenance* | *User Management*.
2. Select a user from the list.
3. Click **Manage User Right**.
4. Under Module Group, click **Store**.
5. Under Transfers, select **Manage Cost Center Areas**.
6. Click **Save**.

Giving cost centers the ability to send goods to other cost centers

Navigate to *myinventory* | *Maintenance* | *Cost Center Areas.*

1. Select a cost center.
2. Select **Transfer To**.
3. Click **Add Cost Centers.**
4. Select a **cost center**.
5. If you want all cost centers below the selected cost center to have the ability to receive transfers from the default cost center:
    a. Select **With Sub Cost Center.**
6. If you want the selected cost center to have the ability to receive items from the Transfer To cost center:
    a. Select **Full Link.**

    For example, you want cost center A to have the ability to transfer items to cost center B and give cost center B the ability to receive items from cost center A.
7. Click **Add**.
8. Repeat steps 4-7 to add more cost centers.
9. Click **Save**.

Giving cost centers the ability to request goods from other cost centers

1. Navigate to *myinventory | Maintenance | Cost Center Areas.*
2. Select a cost center.
3. Select **Transfer From**.
4. Click **Add Cost Centers.**
5. Select a **cost center**.
6. If you want all cost centers below the selected cost center to have the ability to transfer items to the default cost center:
    a. Select **With Sub Cost Center.**
7. If you want the selected cost center to have the ability to transfer items to the Transfer From cost center:
    a. Select **Full Link.**

    For example, you want cost center A to have the ability to receive items from cost center B and give cost center B the ability to transfer items to cost center A.
8. Click **Add**.
9. Repeat steps 4-7 to add more cost centers.
10. Click **Save**.

Enabling the Transfer From Using List and Transfer To Using List modules

1. Navigate to Navigate to *myinventory | Maintenance | User Management*.
2. Select a user from the list.
3. Click **Manage User Right**.
4. Under Module Group, click **Store**.
5. Under Transfers, select **Create Transfer From List** and **Create Transfer To List**.
6. Click **Save**.

Creating a Transfer From Using List

1. Navigate to *myinventory | Transfers |Transfer From Using List.*
2. Select an existing document from the list.
3. Click **To Cost Center**.
4. Select a new cost center from the list.
5. Click **OK**.
6. Click **From Cost Center**
7. Select a new cost center from the list.
8. Click **OK**.
9. Select the **Date**.
10. Click **Create**.
11. From the Transfers From Detail page, modify the existing items or add new items and recipes.
12. If you want to save the newly created list:
    a. Click **Save**.

13. If you want to send the list to the relevant location:
    a. Click **Book**.

About Event Menu Planning

- Plan future menus for your cost centers.
- Measure the planned, expected, and actual profitability of a menu.
- Determine what inventory items your cost center should be ordering.

About Menu Item Classification

In Event Menu Planning, menu items are rated based on their popularity and contribution within each course. According to this rating, the items are classified into four types and styled as follows:

Menu Item Rating	Description	Color Code
HH	The item is both profitable and popular.	Green
HL	The item is high in popularity but low in profit.	Blue
LH	The item is low in popularity but high in profit.	Orange
LL	The item is both low in popularity and profit.	Red

How the popularity of a menu item is measured

The popularity of a menu item is calculated by,

Demand = Number of items sold of a particular menu item / Total number of menu items sold.

If a menu item's sales percentage is greater than the average sales percentage for the entire menu, it receives a rating of **H** to indicate it has a higher sales percentage than the demand mix. If a menu item's sales percentage is lower than the average sales percentage for the entire menu, it receives a rating of **L**.

How the contribution of a menu item is measured

The contribution of a menu item is calculated by,

Contribution Margin = Menu price - Food cost

If a menu item's contribution is greater than the average contribution of the entire menu, it receives a rating of **H** to indicate that it has an above average contribution margin. If a menu item's contribution is lower than the average contribution of the entire menu, it receives a rating of **L**.

About Menu Groups

Menu Groups are essentially courses in a menu (for example, Starters, Main Course, Dessert, etc.). Before creating an Event Menu Plan, you need to first create menu groups in the Menu Group module. You can define up to 20 courses per menu group. See Creating Menu Groups for instructions.

About Result Set Quantity

Result Set Quantity defines the maximum number of records that can be shown in the Event Menu Plan Overview page. You can configure the Event Menu Plan Overview page to show a maximum of 9999 records.

About Column Selection

Column Selection is a filter that lets you select which additional columns that is, menu item attributes to show in the Event Menu Planning Details page. By default, only the POS, Course, Menu Item Name, and QTY columns are shown.

Enabling Event Menu Planning for an organization

1. Navigate to *myinventory* | *Maintenance* | *User Management*.
2. Select a user from the list.
3. Click **Manage User Right**.
4. Under Module Group, click **Production**.
5. Under Menu Planning in Production/Function, select:
    - **Event Menu Planning**
    - **Save Event Menu Plan**
    - **Add/Delete Items to an Event Menu Plan Document**
6. Click **Save**.

Enabling Menu Groups for an organization

1. Navigate to *myinventory* | *Maintenance* | *User Management*.
2. Select a user from the list.
3. Click **Manage User Right**.
4. Under Module Group, click **Master Data**.
5. Under Menu Groups in Master Data/Function, select:
    - **Menu Groups**
    - **Save Menu Groups**
6. Click **Save**.

Enabling Menu Planning by List in List Management

1. Navigate to *myinventory* | *Maintenance* | *User Management*.
2. Select a user from the list.
3. Click **Manage User Right**.
4. Under Module Group, click **System**.
5. Under List Management in System/Function, select:
    - **Menu Plan List**
    - **Add Menu Items to Menu Plan created from List**
6. Click **Save**.

Creating Menu Groups

1. Navigate to *myinventory* | *Master Data* | *Menu Groups.*
2. Click **New**.
3. Enter a name for the **Menu Group**.
4. (Optional) Enter the **Menu Group No**.
5. Define the menu groups. For example, Starter, Soups, Main Course, etc.
6. Click **Save**.

Configuring menu item sort method in Event Menu Planning

1. Navigate to *myinventory* | *Maintenance* | *Settings* | *Event Menu Plan* tab.
2. Select a sorting method. See Menu item sort methods in Event Menu Planning.
3. Click **Save**.

Configuring the maximum result quantity in Event Menu Planning

1. Navigate to *myinventory* | *Maintenance* | *Settings* | *Event Menu Plan* tab.
2. Enter the **Result Set Quantity.**
3. Click **Save**.

Creating an Event Menu

1. Navigate to *myinventory* | *Master Data* | *Menu Groups.*
2. Click **New**.
3. Enter a name for the **Menu Group**.
4. (Optional) Enter the **Menu Group No**.
5. Define the menu groups. For example, Starter, Soups, Main Course, etc.

6. Click **Save**.

Creating a new Event Menu Plan (Blank Menu Plan)

1. Navigate to *myinventory* | *Event Menu Plan* | *Blank Event Menu Plan*.
2. Select a **Cost Center**.
3. Select a **Menu Group**.
4. Enter the menu plan name.
5. In the **From** date editor, select the date this menu plan becomes active.
6. In the **To** date editor, select the date this menu plan becomes inactive.
7. Click **Create**.

   See Adding menu items to an Event Menu Plan, Defining the planned quantity for menu items in an Event Menu Plan, Changing the menu level of items in an Event Menu Plan, Printing receipt cards for linked recipes and items in a menu, Deleting menu items in an Event Menu Plan, Showing additional columns in Event Menu Planning.

Creating an Event Menu from an existing list

1. Navigate to *myinventory* | *Event Menu Planning* | *List.*
2. Click **Refresh**.
3. Select an existing menu from the list.
4. Modify the event menu name, cost center, and menu active duration.
5. Click **Create**.
6. Make the necessary changes and **Save**.

   See Adding menu items to an Event Menu Plan, Defining the planned quantity for menu items in an Event Menu Plan, Changing the menu level of items in an Event Menu Plan, Printing receipt cards for linked recipes and items in a menu, Deleting menu items in an Event Menu Plan.

Creating an Event Menu Plan in List Management

1. Navigate to *myinventory* | *Maintenance* | *List Management*.
2. Click **Create List**.
3. Enter the **List Name** and select **Event Menu Plan List.**
4. Click **OK.**
5. Enter the **Cost Center.**

6. (Optional) Enter a **Reference.**
7. Click **OK.**
8. If you want to make this list available for all users:

    a. Select **Corporate List.**

9. If you want to lock this list:

    b. Select **Locked List**.

    See Adding menu items to an Event Menu Plan, Defining the planned quantity for menu items in an Event Menu Plan, Changing the menu level of items in an Event Menu Plan, Printing receipt cards for linked recipes and items in a menu, Deleting menu items in an Event Menu Plan, Assigning a visibility criterion in List Management, Showing additional columns in Event Menu Planning.

Adding menu items to an Event Menu Plan

To add menu items to an Event Menu plan:

1. In the Event Menu Planning Details page, click **Add Menu Item(s)**.

2. Select a **Menu Group**.

3. Search for menu items using the family group, menu item number, menu item name, recipe, or inventory item.

4. Click **Refresh** to show the search results.

5. Select one or more menu items.

6. Click **OK**.

7. To add items to another menu group:

    a. Repeat steps 1-6.

8. Click **Load Sales** to import the sales for the inserted menu items.

9. Click **Yes** to confirm and click **Save**.

10. If you want this menu to be saved for future use as a template or list:

    a. Click **Save as List**.

11. If you want to save the menu and return to the Overview window where you can continue working on this menu another time:

a. Click **Suspend**.

Defining the planned quantity for menu items in an Event Menu Plan

1. In the Event Menu Planning Details page, for each item enter the planned quantity in the **QTY** column of the respective item.
2. Click **Calculate** to calculate the data.
3. Click **Save**.
4. If you want this menu to be saved for future use as a template or list:
   a. Click **Save as List**.
5. If you want to save the menu and return to the Overview window where you can continue working on this menu another time:
   a. Click **Suspend**.

Assigning a visibility criterion in List Management

1. Click **Visibility**.
2. Select an **Assignment Group 1**.
3. Click **Assign->>**
4. Select an **Assignment Group 2.**
5. Click **Assign->>**
6. Select a **Cost Center**.
7. Click **Assign->>**
8. Click **Save.**

Changing the menu level of items in an Event Menu Plan

1. In the Event Menu Planning Detail page, select one or more menu items.
2. Click **Change Menu Level**.
3. Select a new menu level from the list.
4. Click **OK.**
5. Click **Save**.

12. If you want this menu to be saved for future use as a template or list:
    a. Click **Save as List**.
13. If you want to save the menu and return to the Overview window where you can continue working on this menu another time:

a. Click **Suspend**.

Deleting menu items in an Event Menu Plan

1. Navigate to *myinventory* | *Menu Planning* | *Suspended.*
2. Click **Refresh**.
3. Select a menu from the list.
4. In the Event Menu Planning Detail page, select one or more menu items.
5. Click **Delete Menu Item(s)**.
6. Click **Save**.
7. If you want this menu to be saved for future use as a template or list:

   a. Click **Save as List**.

8. If you want to save the menu and return to the Overview window where you can continue working on this menu another time:

   a. Click **Suspend**.

Printing receipt cards for linked recipes and items in a menu

1. In the Event Menu Planning Details page, click **Print Receipts**.
2. Select a template using **Select Report**.
3. Click **OK**.

Viewing and modifying suspended Event Menu Plans

1. Navigate to *myinventory* | *Menu Planning* |*Suspended*.
2. Click **Refresh**.
3. Select a menu from the list.
4. Make the necessary changes to the menu plan.

   See Changing the menu level of items in an Event Menu Plan, Deleting menu items in an Event Menu Plan, Defining the planned quantity for menu items in an Event Menu Plan, Printing receipt cards for linked recipes and items in a menu, Showing additional columns in Event Menu Planning.

Modifying Event Menu Plan Lists

1. Navigate to *myinventory* | *Maintenance* | *List Management*.
2. Select the **Event Menu Plan List** filter and click **Refresh.**
3. Select a menu plan.
4. If you want to make this list available for all users:

    a. Select **Corporate List.**

5. If you want to lock this list and make it only available for users that can accesses locked lists:

    b. Select **Locked List**.

6. Click **Save**
7. Make the necessary changes to the menu plan.

    See Changing the menu level of items in an Event Menu Plan, Deleting menu items in an Event Menu Plan, Defining the planned quantity for menu items in an Event Menu Plan, Printing receipt cards for linked recipes and items in a menu.

Showing additional columns in Event Menu Planning

1. Click the **Column Selection** link in the Event Menu Planning Detail page.
2. Select the columns.
3. Click **OK.**

Menu item sort methods in Event Menu Planning

You can use either of the following sorting methods to arrange the menu items within menu groups in an event menu plan.

Sort Type	Description
Item Name	Sorts the menu items in alphabetical order.
Item Number	Sorts the menu items by their number.
Position	Sorts the menu items by their Point-of-Sale (POS) position.

Symbols and styles used in Event Menu Planning

The table below describes the symbols and styles that you might see in Event Menu Planning.

Symbols and Styles	Connotation

A warning icon  in front of a menu item.	The menu item is not linked to a recipe or an inventory item. No sales price, revenue, margin, and COS value are populated. That is, the values are shown as 0.00. Once the menu item is linked to a recipe or inventory item in Menu Item Linking, all values in Event Menu Planning update accordingly.
The menu item number (PLU) is red.	The menu item is inactive.

About the Order Delivery Date

The **Delivery Date** date editor in the Ordering module is used to specify the date items are to be delivered. Only the current business date or any date in the future can be selected as the delivery date and you can define separate delivery dates for each different vendor in an order.

Granting users the rights to set delivery dates

1. Navigate to *myinventory* | *Maintenance* | *Settings* | *Orders* tab.
2. Select **Use Line Item Delivery Date**.
3. Click **Save**.

Defining separate delivery dates for different vendors in an order

1. Navigate to the Purchase Orders Detail page from any of the Ordering modules.
2. Select the check box next to the items belonging to the same vendor that you want to set the delivery date.
3. Click **Set Dates**.
4. Select a **Delivery Date**.
5. Click **OK**.
6. Repeat steps 2-5 for all vendors on the order.
7. Click **Save**.

About Standard and Custom Catalogs

myinventory allows two types of nutrient catalogs to be imported:

- Standard Catalogs
- Custom Catalogs

A Standard Catalog is one that has been created by an agency, such as the U.S. Department of Agriculture (USDA) and formatted for use with myinventory.

A Custom Catalog is a nutrient catalog that has been created externally and formatted for use with myinventory. This could be created by an organization that contracted a third party to document the nutritional information for their menu offering.

About Nutrient Catalog Licensing

Standard Catalogs offered by MICROS require you to obtain a license from the official distributor to use the information. The License Confirmation prompt is used to inform you of those nutrients. The prompt is shown when you attempt to import or use the licensed nutrients in an item or recipe.

The License Confirmation prompt is invoked at the following modules and is shown until the user confirms that a license has been obtained:

Module Name	Action Performed
Nutrient Catalog	When attempting to **Import Catalog** or **Update Catalog.**
Master Data | Items	Attempting to enter the Nutrient tab.
Recipes	Attempting to enter the Nutrient tab.
Maintenance | Settings	Attempting to enter the Nutrient tab.

Importing a Standard Catalog

1. Navigate to *myinventory* | *Maintenance* | *Nutrient Catalog.*
2. Select a **Standard Catalog** from the catalogs listed.
3. Click **Import Catalog**.
4. If you or your organization has obtained the license to use this catalog:
    a. Select the first check box.
    b. Click **OK**.
    c. Once the import is complete, click **OK** when prompted.
5. If you or your organization **do not** have the license to use this catalog:
    a. Select the second check box.
    b. Click **Cancel**.

Importing a Custom Catalog

1. Navigate to *myinventory* | *Maintenance* | *Nutrient Catalog.*
2. Select **Custom Catalog**.
3. Click **Browse** and browse to the location where the catalog is saved in your PC.
4. Select the catalog.
5. Click **Open.**
6. Click **Import Catalog**.
7. Once the import is complete, click **OK** when prompted.

About Vendor Account format character indicators

You can use the following indicators to define the Vendor Account format:

Supported Characters	Description
N	Denotes a number.
A	Denotes a character
?	Denotes a number or character.
-	Character separator.
/	Character separator.
.	Character separator.
;	Character separator.
|	Character separator.
:	Character separator.
_	Character separator.
#	Character separator.

When defining the Vendor Account format:

- The number of indicators must equal the number of characters in the Vendor Account.
- A maximum of 64 characters can be defined.

Example Vendor Account formats

Vendor Account Format	Description and Example Vendor Account Number
NNNNNNNNNNNNN	A 12 digit vendor account number. For example, 123456789123
NNNNNNAAAAAA	A 12 character vendor account number. The first 6 characters should be digits while the last 6 should be characters. For example, 123456ABCDFG
NNNNNN-AAAAAA	A 12 character vendor account number. The first 6 digits and the last 6 characters are separated by a dash. For example, 123456-ABCDEFG
???? NNNNNNNN	A 12 character vendor account number. The first four characters can be either digits or letters but the last 8 characters should be digits. For example, A12B34567890

Defining the format for the Vendor Account

1. Navigate to *Maintenance*| *Settings* | *Vendor* tab.
2. In **Vendor Account**, type the format.
3. Click **Save**.