

# **Materials Control**

## **Item Group Assignment**



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## **Changes:**

This document will describe the use and functionality of the User- / Item Group – Assignment.

This function was designed to restrict the use of articles assigned to specific item groups in the ordering module.

Using that functionality it can be restricted that e.g. the engineering department cannot order Food & Beverage articles.

Please note that this filter is not valid for existing requests, baskets and order assortments.

It is planned to add this functionality to the receiving module at a later stage as well.

## I. CONFIGURATION:

### 1. SYSTEM > USERS

Here the Item Group filter is defined.

Goto System > Users > select a user:

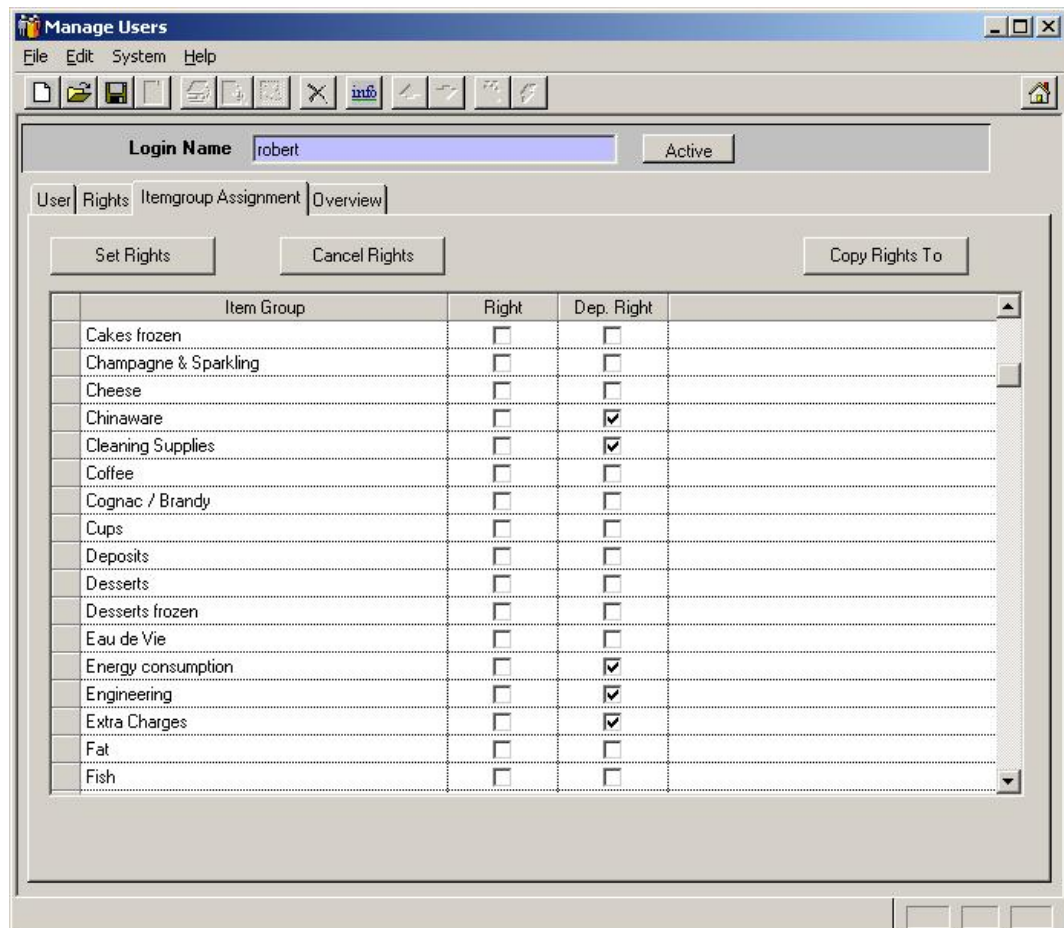
The screenshot shows the 'Manage Users' window with the following details:

- Login Name:** robert
- Active:** (button)
- Tabs:** User, Rights, **Itemgroup Assignment** (selected), Overview
- User:** Robert Schneider
- Password:** (masked with 'xxxx')
- Department:** Engineering
- Phone:** (empty field)
- Fax:** (empty field)
- E-Mail:** (empty field)
- Information:** (empty text area)
- C/S Filter:** (checkbox unchecked)
- Apply C/S Filter from another User:** (button)
- Default C/S:** Holiday Park Hotel
- Code:** 1
- Cost Centers/Stores:** (empty field)
- Authorisation Level:** 0
- Purchasing:**
  - User is Central Purchase Manager:** (checkbox unchecked)
  - Purchase Manager:** (empty field)
  - MAX Budget:** (empty field)
- Orders/Book Revenue:**
  - Department:** (checkbox unchecked)
  - All:** (checkbox unchecked)
- Tentative Master Data:**
  - Stock Article:** (checkbox unchecked)
  - Purchase Article:** (checkbox unchecked)
  - Supplier:** (checkbox unchecked)
  - Unit:** (checkbox unchecked)
- Last Login Date/Time:** 17.03.2006 15:03:25
- User must change password on next login:** (checkbox unchecked)
- Use Item Group Filter:** (checkbox checked, highlighted with a red rectangle)

Mark the checkbox "Use Item Group Filter". If this flag is set the system is looking for the assigned item groups.

Please note that if this box is ticked and no groups are assigned, the user will not be able to use any article in ordering or requisitioning (except assortments)!

Click on the tab "Item Group Assignment":



Here now the user can activate every single item group for this user.

This definition can also be set per department. Please see the description below. Besides the pre-definition per department here additional groups can be enabled.

Options:

Set Rights:

- This option allows to mark all records by one click. The system will inform the user that all records will be marked. Confirm with "Yes" to proceed.



Cancel Rights:

- This option allows to unmark all records by one click. The system will inform the user that all records will be unmarked. Confirm with "Yes" to proceed.



Copy Rights to:

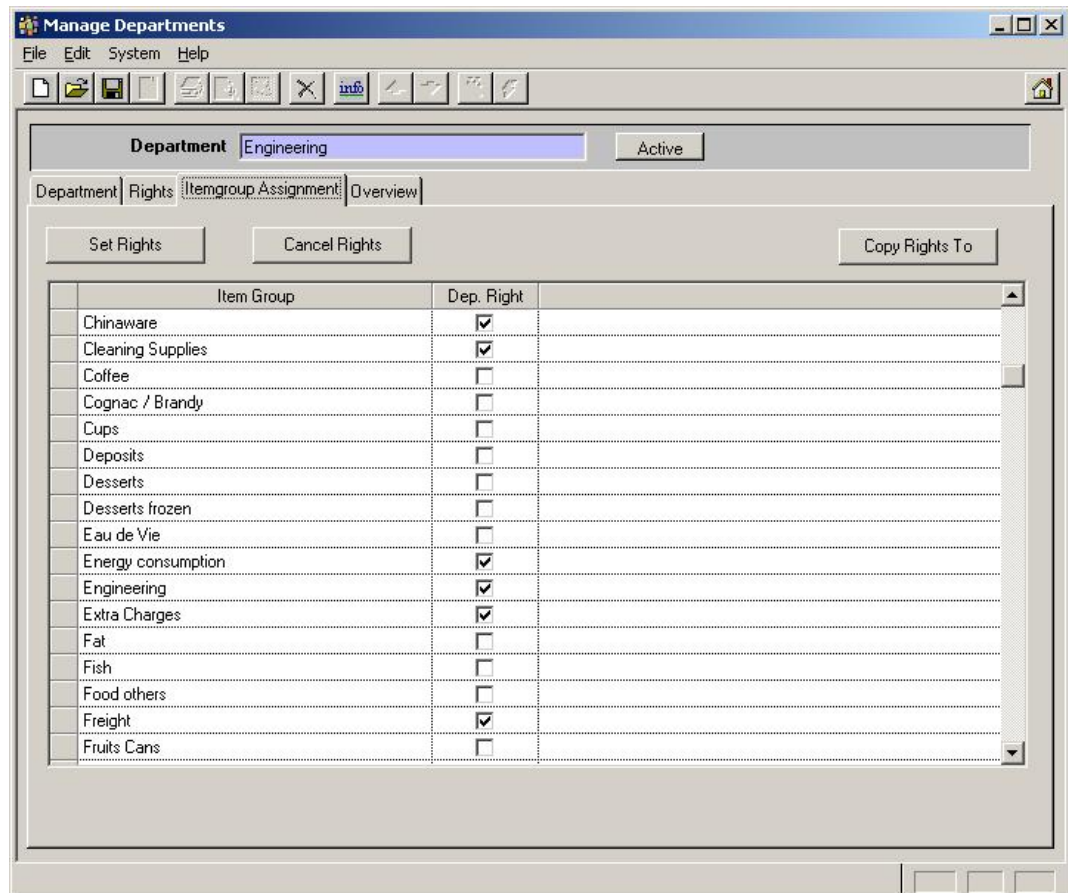
- This option allows to copy the current configuration to any other user. All available users will be listed here. One or more users can be marked. Confirm with "OK" to copy the current configuration to the selected users.



## 2. SYSTEM > DEPARTMENTS

In order to make this assignment more user-friendly we have used the same logic as for the “User Rights”.

Goto System > Departments > select a department > Click on the tab “Item Group Assignment”:



Here the user can select / define the access already per department. This will be the basic definition for all users assigned to this department.

The functions “Set Rights” (mark all records), “Cancel Rights” (unmark all records) and “Copy Rights to” (copy definition to another department) are available here as well and working as described above.

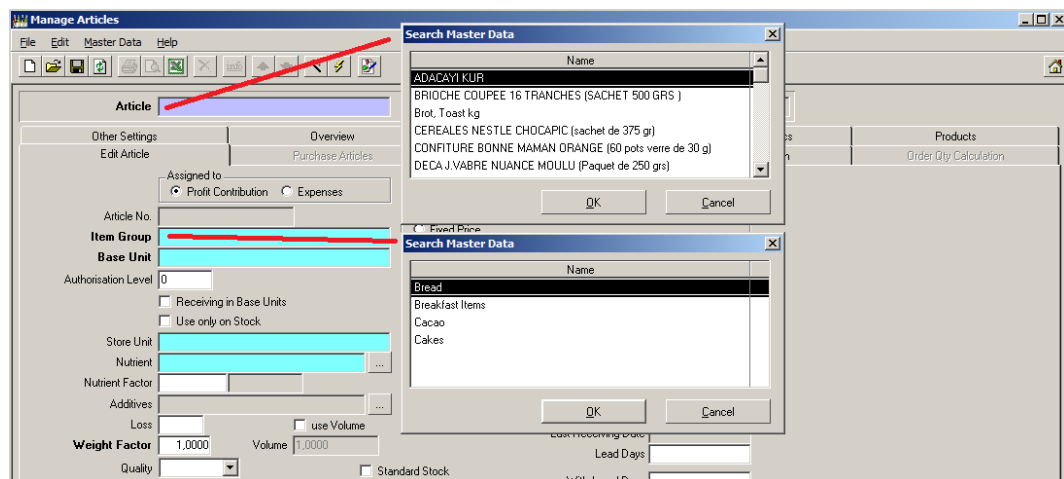


## II. HOW TO USE?:

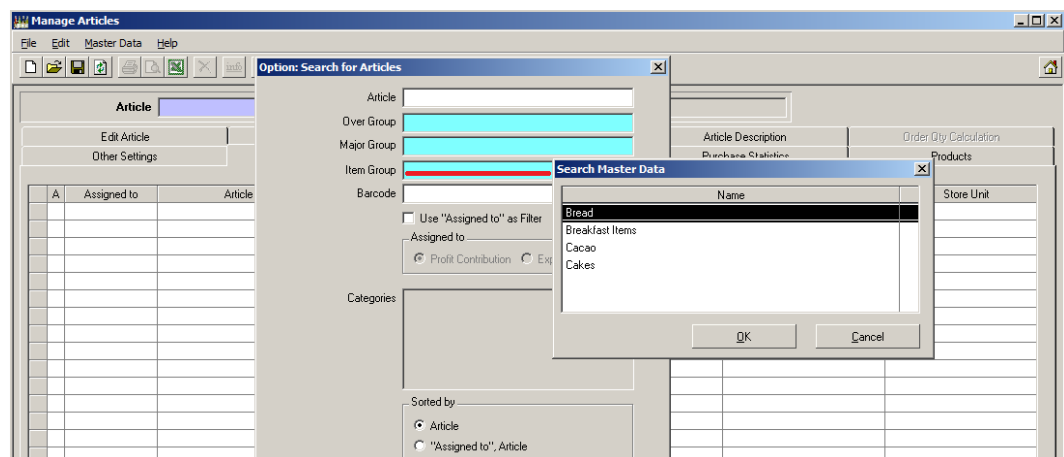
In the screen above a user assigned to the Engineering Department was used. Usually such a user does not need to have access to Food & Beverage articles. So groups related to his responsibilities are marked only. Also a Cost Center Filter should be set in order to restrict the access to F&B cost centers.  
In addition to that the Supplier- / Cost Center- Assignment should be used. Through this the user will not be able to see any F&B related supplier.

### 1. MANAGE ARTICLES

Master Data > Manage Articles:

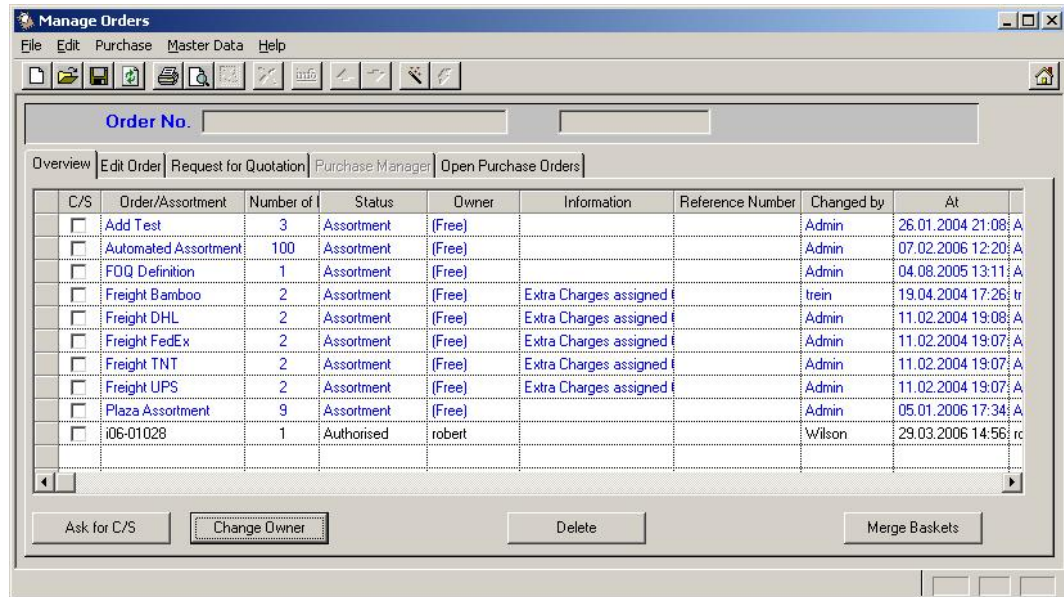


Also when using the Overview screen he will be able to access allowed articles only.



## 2. PURCHASE ORDERS

Goto Purchase > Purchase Orders:



The user can see only:

- Free Assortments
- Assortments assigned to his department
- Assortments assigned to him directly
- Order Baskets for his department
- Own Order Baskets
- Order Requests for his department
- Own Requests

Create a new Purchase Order > click on "New Position" > select the cost center (only CC's out of his CC filter will be displayed) >

- Place cursor in the "<Item Group>" filter box > only item groups assigned to him will be visible
- Place cursor in the "article" selection box > only articles of the item groups assigned to him will be visible

**Note:** If the user has access to assortments containing articles from other item groups he will be able to use them!

### 3. REQUISITIONING

Goto Purchase > Requisitioning:

[illegible]

The user can see only:

- Free Assortments
- Assortments assigned to his department
- Assortments assigned to him directly
- Order Baskets for his department
- Own Order Baskets
- Order Requests for his department
- Own Requests

Create a new Requisition > click on “New Position” > select the cost center (only CC’s out of his CC filter will be displayed) >

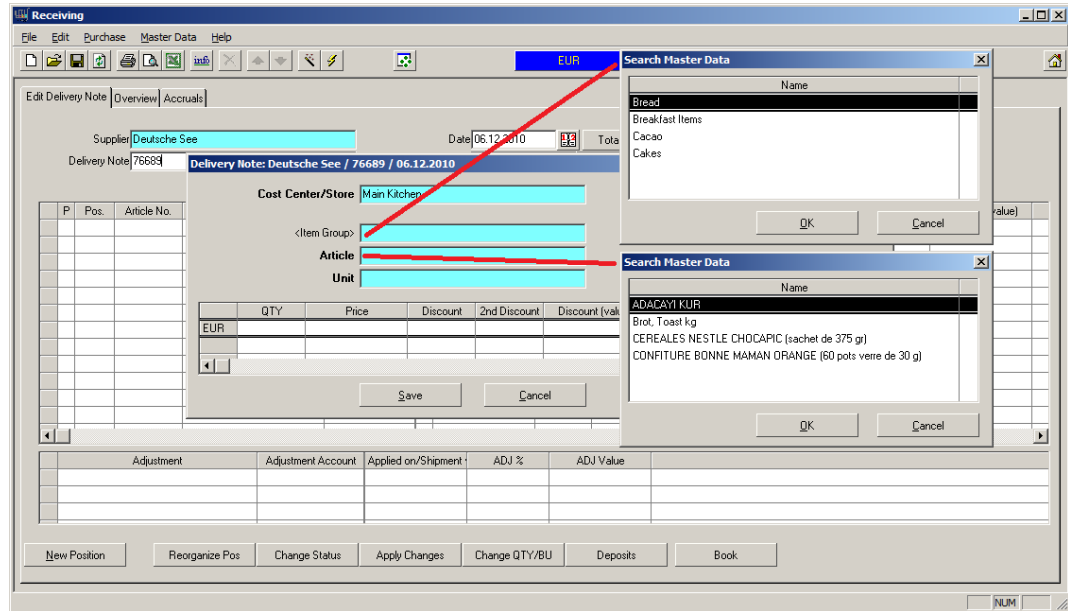
- Place cursor in the “<Item Group>” filter box > only item groups assigned to him will be visible
- Place cursor in the “article” selection box > only articles of the item groups assigned to him will be visible

**Note:** If the user has access to assortments containing articles from other item groups he will be able to use them!

## 4. RECEIVING

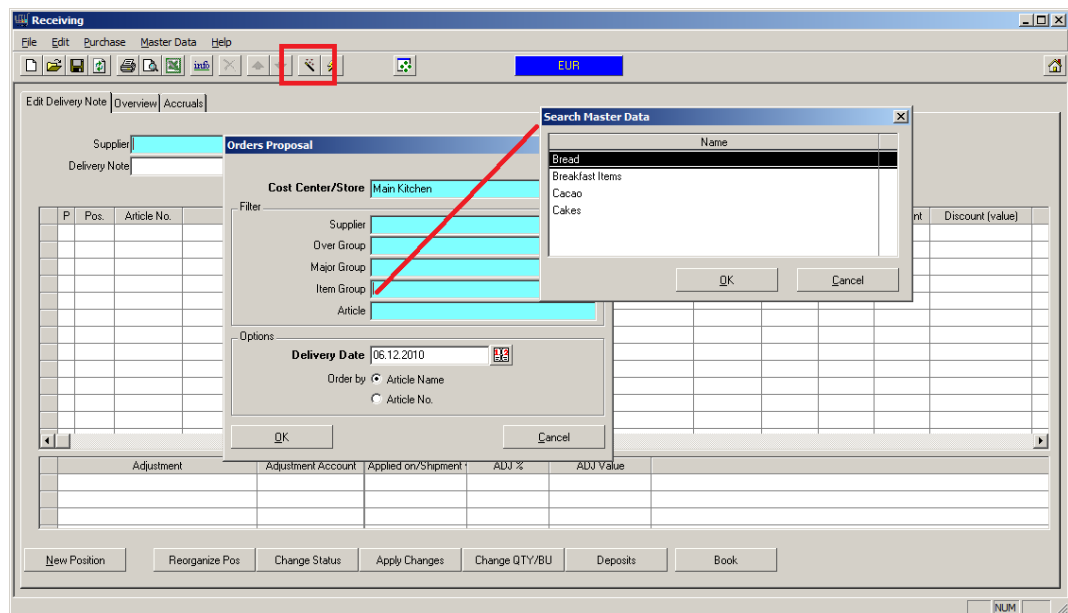
Goto Purchase > Receiving:

When using the module Receiving this user will see the allowed item groups and assigned articles only at creation of a new document:



NOTE: This filter does not affect accessible assortments! These will contain all articles defined!

Also when using the wizard function the system checks for the user's item group filter.

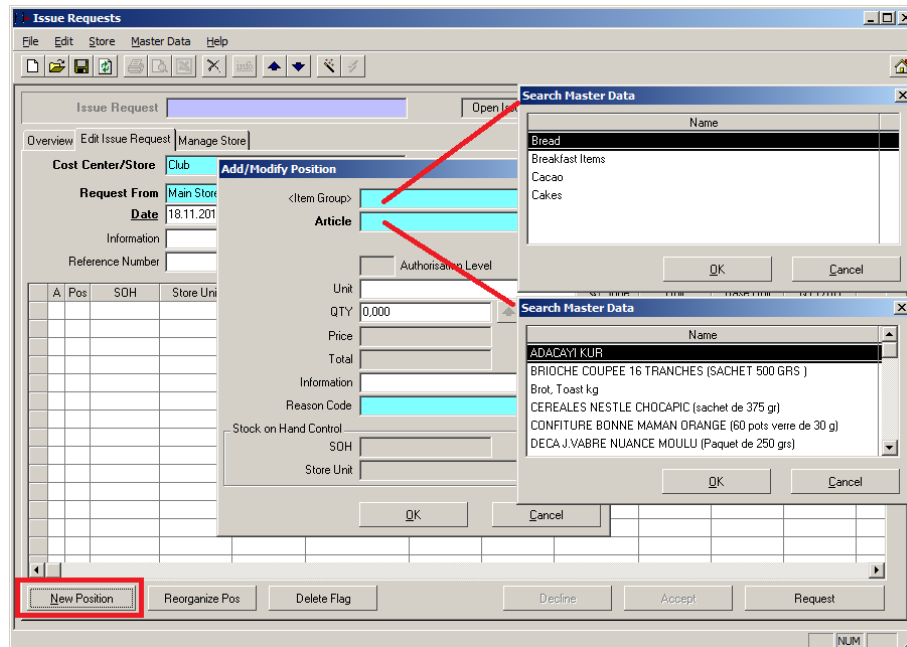


The user can select from allowed item groups only. If no filter was selected the system will populate all articles assigned to the allowed item groups.

## 5. ISSUE REQUESTS

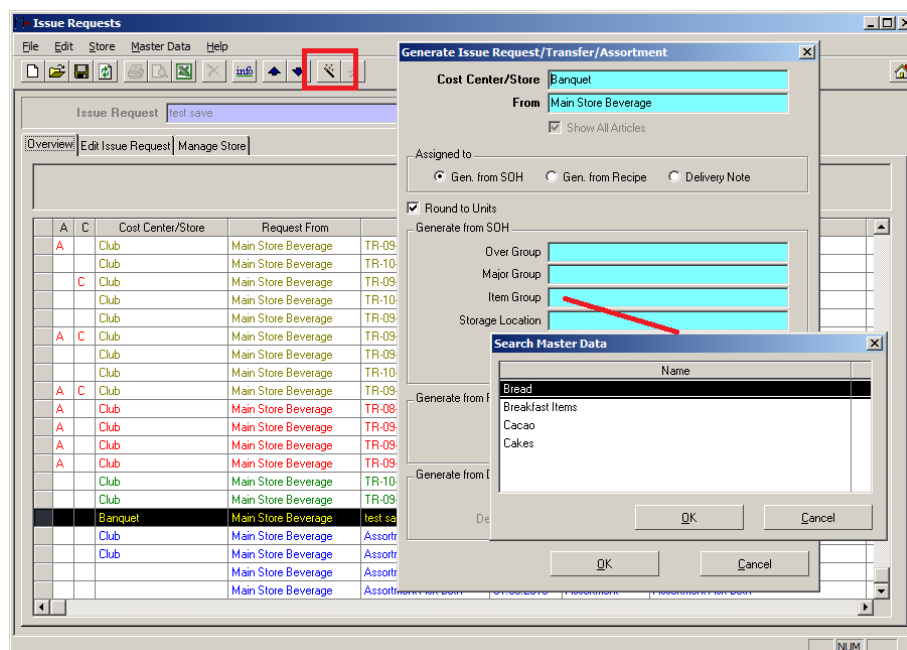
Goto Store > Issue Requests:

When using the module Issue Requests this user will see the allowed item groups and assigned articles only at creation of a new document:



NOTE: This filter does not affect accessible assortments! These will contain all articles defined!

Also when using the wizard function the system checks for the user's item group filter.

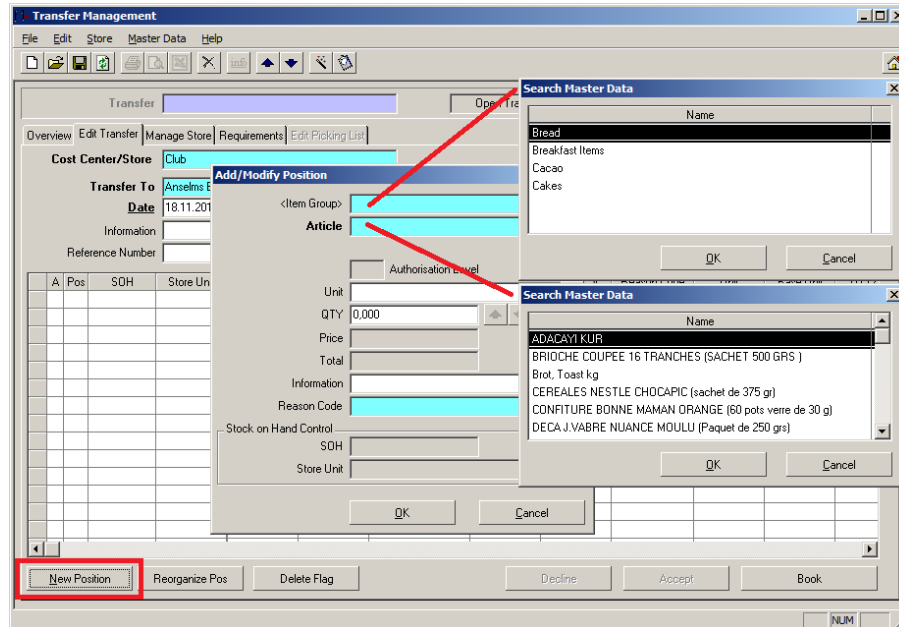


The user can select from allowed item groups only. If no filter was selected the system will populate all articles assigned to the allowed item groups.

## 6. TRANSFERS

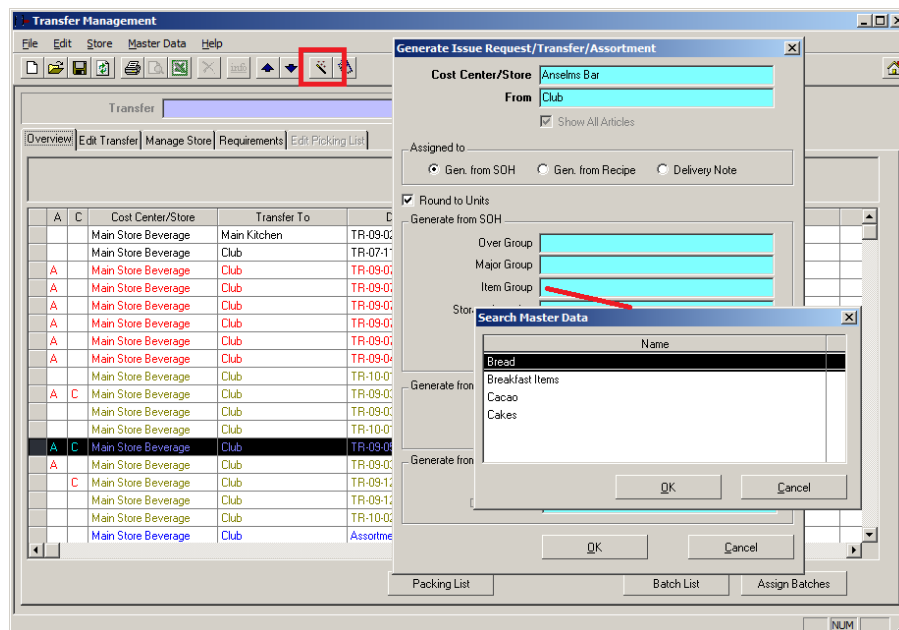
Goto Store > Transfer:

When using the module Transfer this user will see the allowed item groups and assigned articles only at creation of a new document:



NOTE: This filter does not affect accessible assortments! These will contain all articles defined!

Also when using the wizard function the system checks for the user's item group filter.



The user can select from allowed item groups only. If no filter was selected the system will populate all articles assigned to the allowed item groups.



## 8. MANAGE STORE

Goto Store > Manage Store:

When using the module Manage Store this user will see the allowed item groups and assigned articles only:

**Option: Manage Store**

Cost Center/Store: Main Kitchen

Over Group:

Major Group:

**Item Group:**

Search Master Data

Name

Bread

Breakfast Items

Cacao

Cakes

OK Cancel

**Manage Store**

File Edit Store Master Data Help

---

Main Kitchen With non-inventory Articles; Displayed in Base Units; SOH Value recalculated with last purchase Price; Evaluation by AVE;

Manage Store | Stock Taking Lists

Article No.	Article	SOH	Base Unit	Unit	AVE	Total per AVE	Total (Sales P.)
13300002	BRIOCHE COUPEE 16 TRANI	0,000	Kilogram	Boîte de 1 Kilogramme	3,82000	0,00000	0,000
13300003	Brot, Toast kg	-190,839	Kilogram	Kilogram	0,00000	0,00000	0,000

Articles w/o SOH      Storage Location      Deactivate      Stock Take Units      ☐ Sales Price Markup      Apply Markup      Add Article



## 9. RECIPES

Goto Production > Manage Recipes:

When adding new ingredients this user will see the allowed item groups and assigned articles only:

**Manage Recipes**

File Edit Production Menu Plan Master Data Help

Recipe Sandwich IP & Coke /v119 Private Active

Ingredients Details Categories Nutrients Production Planning

Recipe No. 765193 Base - Kitchen

Recipe Group Sandwiches

Major Group Food POS

Recipe Yields 1,000 Each

Portion Size 1,000 Ea

Number of Portions 1,000 Weight/Port.

Production Article Sandwich IP & Coke (PA)

**Edit Recipe Ingredient**

Component Type Article

< Item Group >

< Categories >

Article

**Search Master Data**

Name
Bread
Breakfast Items
Cacao
Cakes

OK Cancel

**Search Master Data**

Name	Last Price
BRIOCHE COUPEE 16 TRANCHES (SACHET 500 GRS )	3,82000
Brot, Toast kg	0,61888
CEREALES NESTLE CHOCAPIC (sachet de 375 gr)	1,52000
CONFITURE BONNE MAMAN ORANGE (60 pots verre de 30 g)	0,20000
DECA J.VABRE NUANCE MOULU (Paquet de 250 grs)	8,62000
MIEL TOUTES FLEURS (POT DE 1KG)	4,96000

OK Cancel

POT

Stand. Po

Planned

Text

Loss / 2nd Loss

Pos	T	Number	Component
1	A	13300003	Brot, Toast kg
2	A	18100001	Butter KG
3	A	12100002	Tomatoes kg
4	A	14300001	Cheese Gouda
5	A	10200001	Salami KG
6	A	16900001	Mushrooms / Can 220gr
7	A	17000004	Ketchup Heinz 350ml
8	R	99	Altibier FL (36002)