Materials Control

Item Group Assignment

Copyright by:
MICROS-FIDELIO GmbH
Europadamm 2-6
D - 41460 Neuss
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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.

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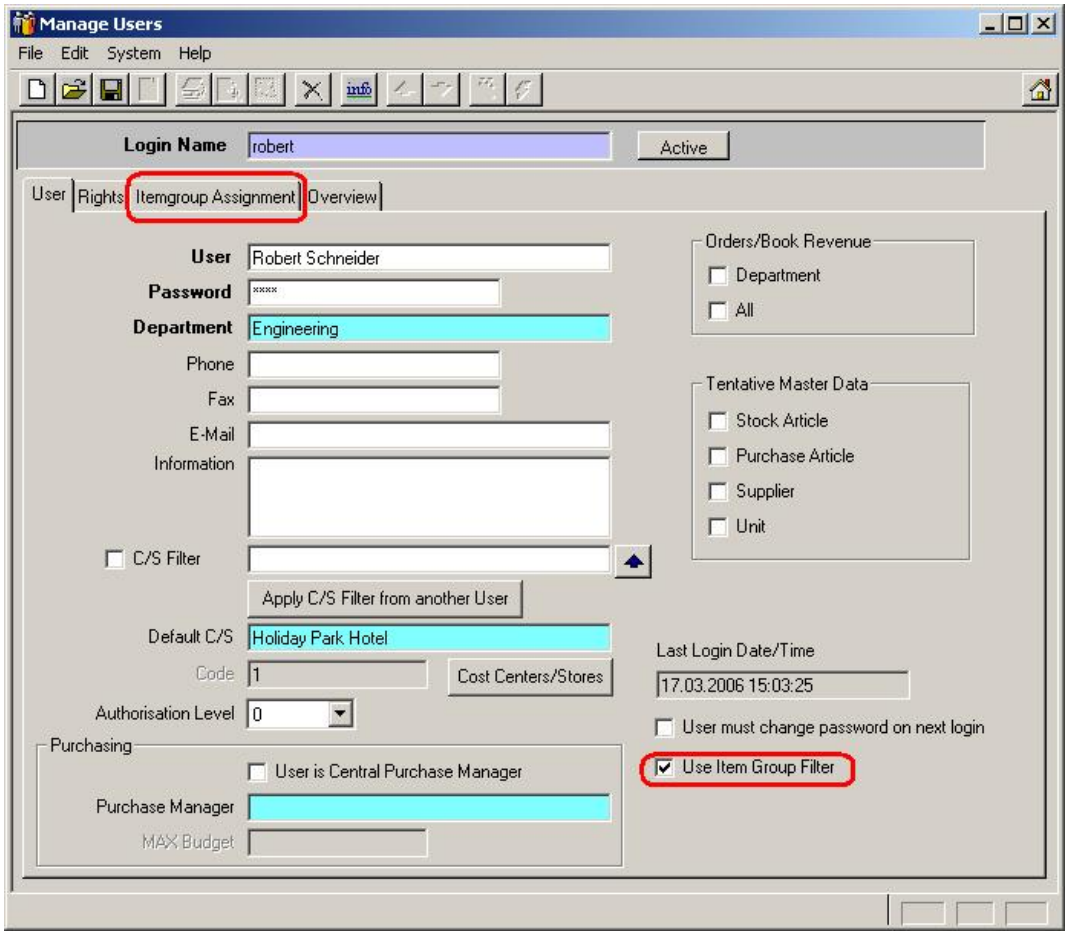
I. CONFIGURATION:

1. SYSTEM > USERS

Here the Item Group filter is defined.

Goto System > Users > select a user:



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”:

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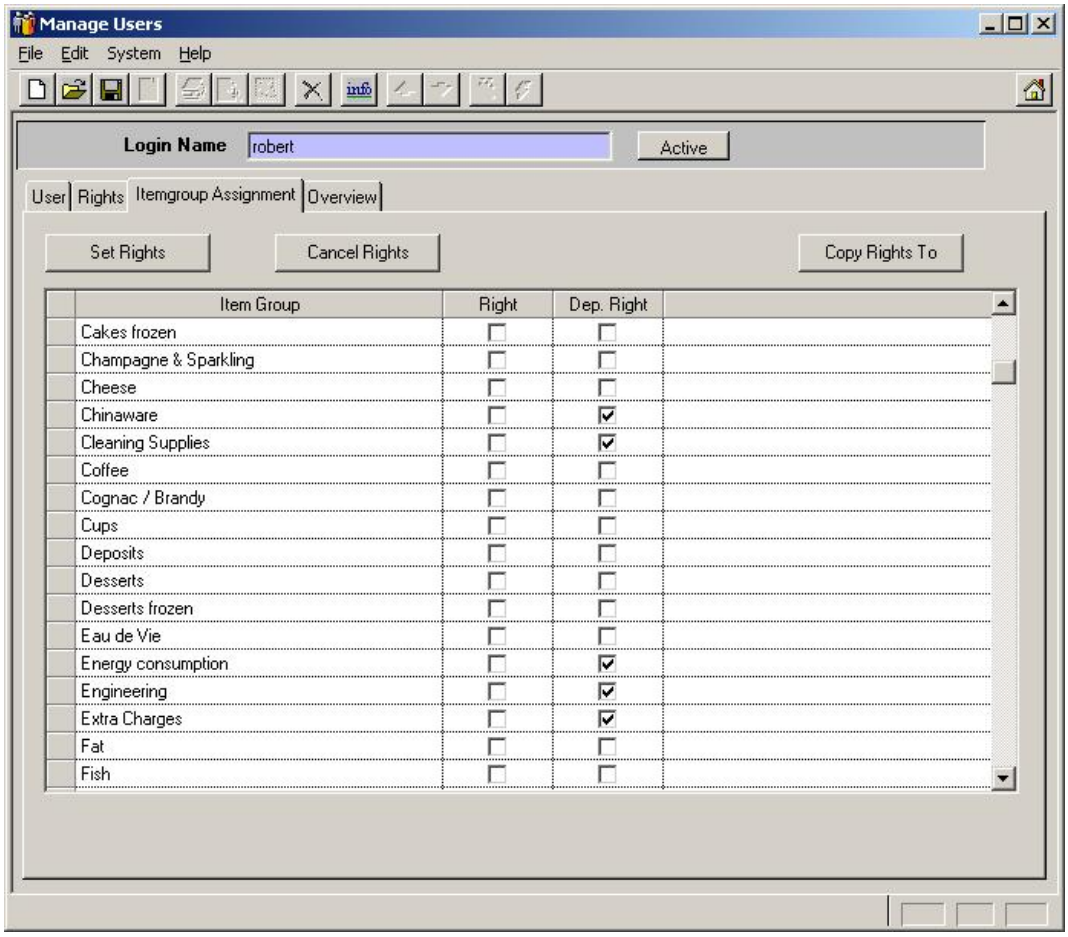

Here now the user can activate every single item group for this user.

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.

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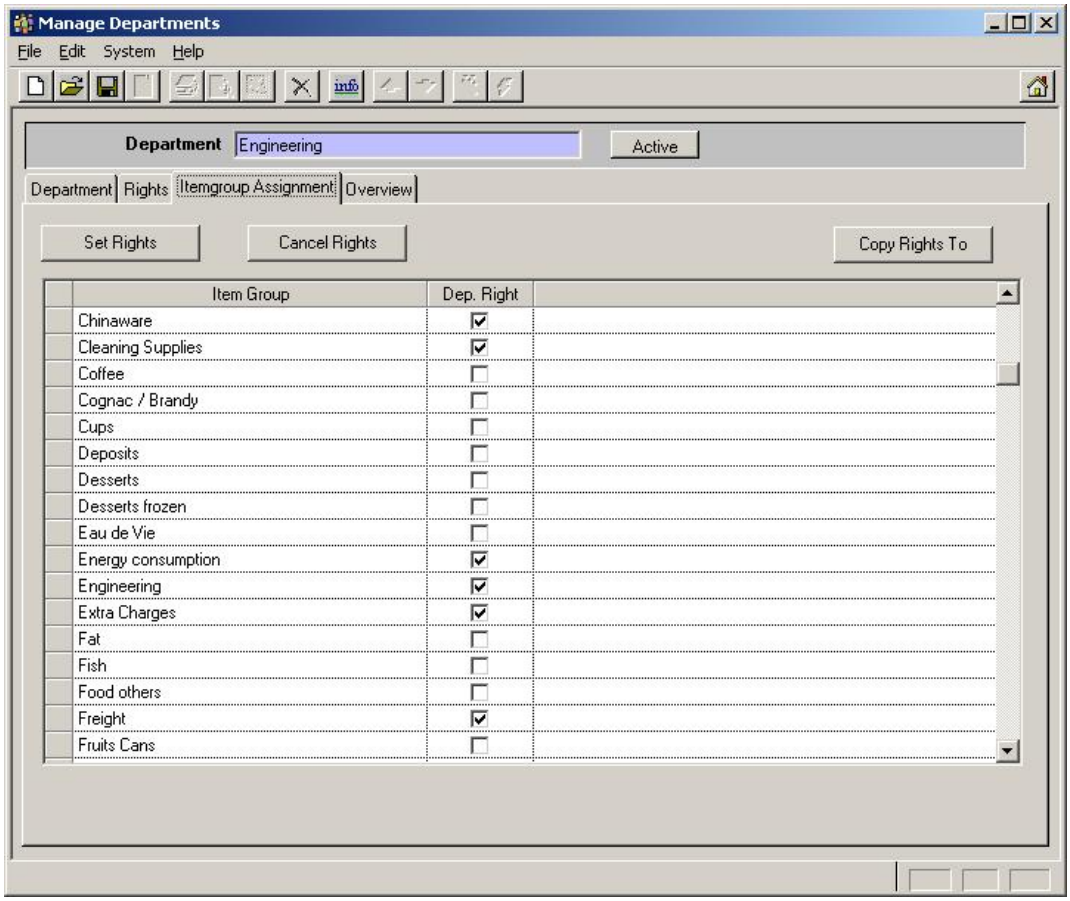
Copy Rights to:

- 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.

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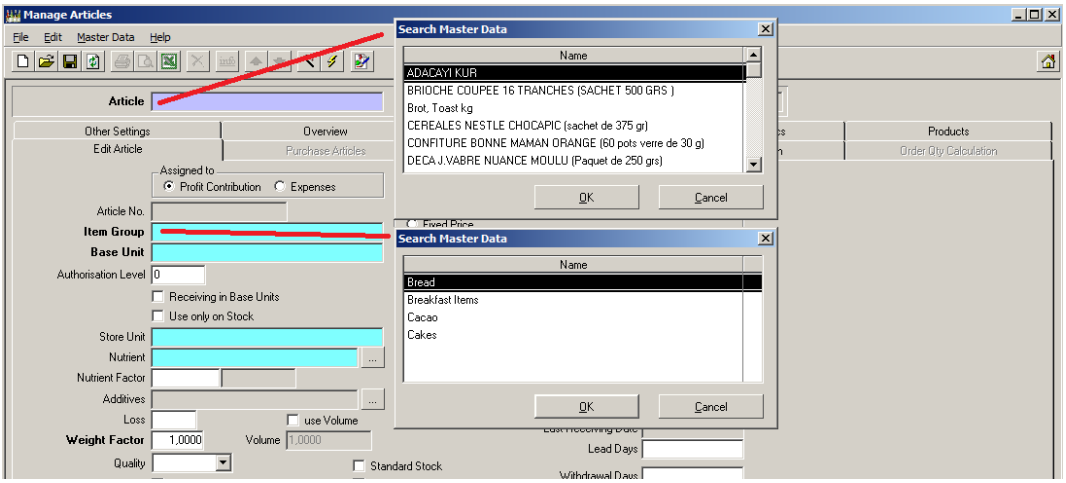
II. HOW TO USE?:

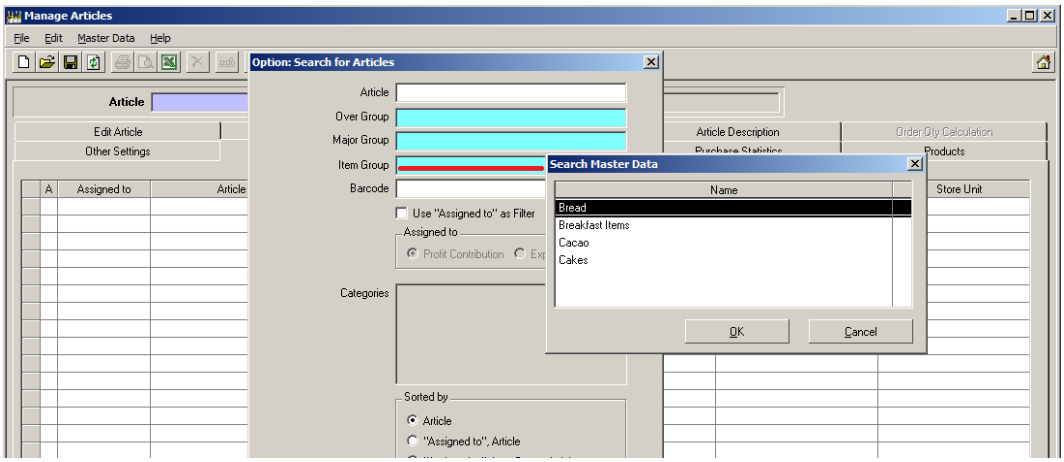
In the screen above a user assigned to the Engineering Department was used. Usually such a user does not need to have access to Food & Beverage articles. So groups related to his responsibilities are marked only. Also a Cost Center Filter should be set in order to restrict the access to F&B cost centers.
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:

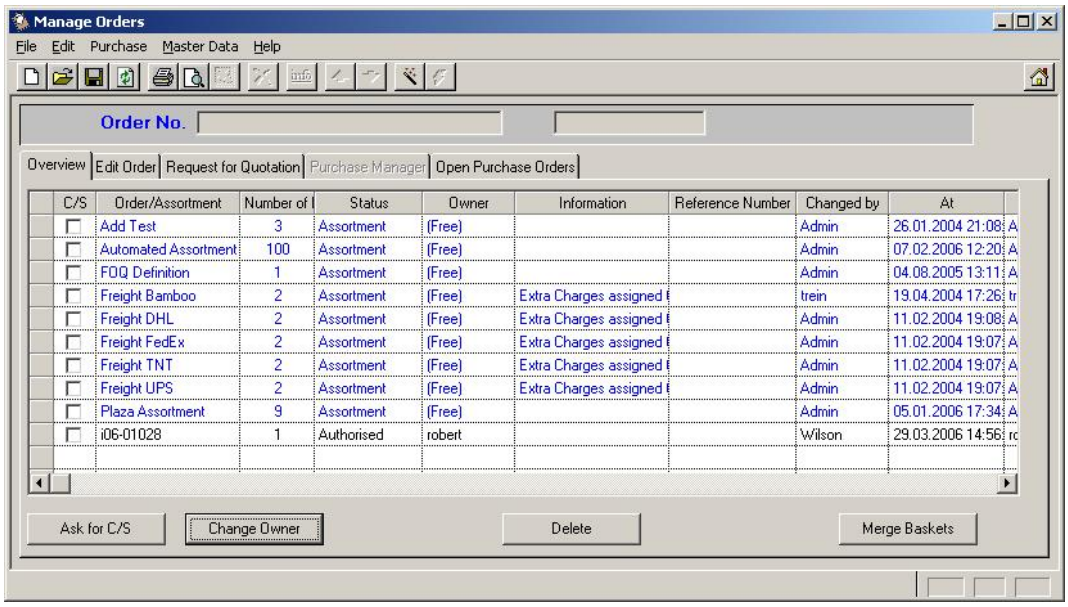


Also when using the Overview screen he will be able to access allowed articles only.



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!

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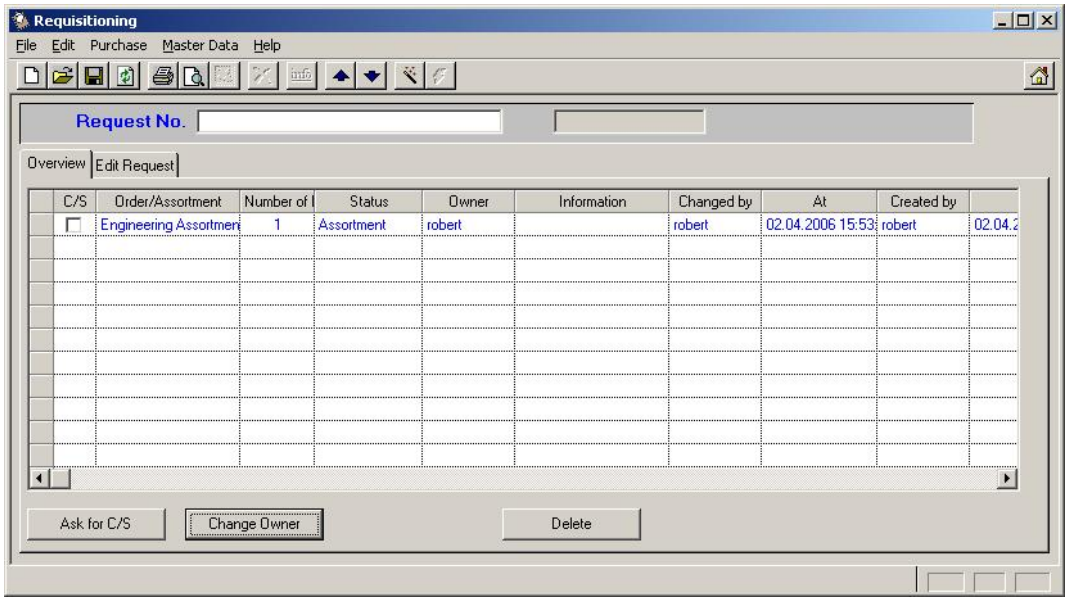
3. REQUISITIONING

Goto Purchase > Requisitioning:



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
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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!

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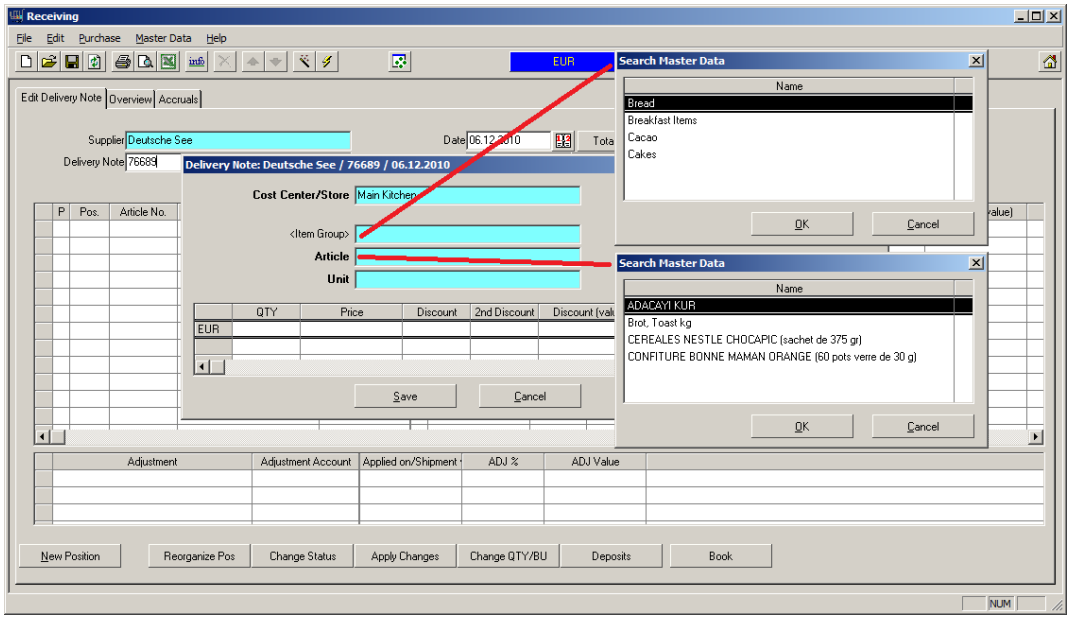
4. RECEIVING

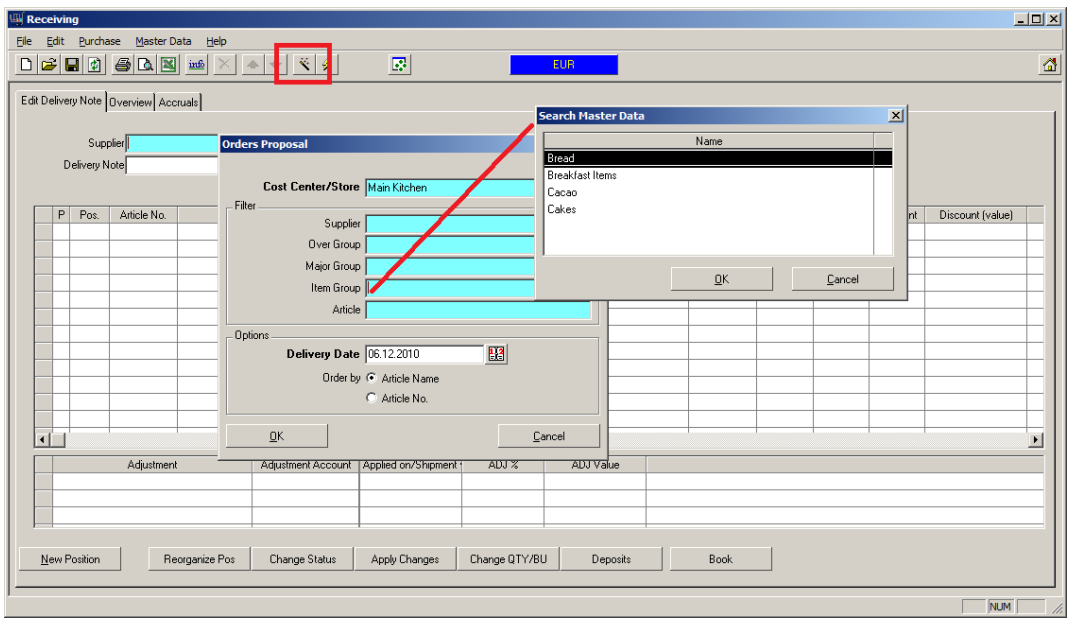
Goto Purchase > Receiving:

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.

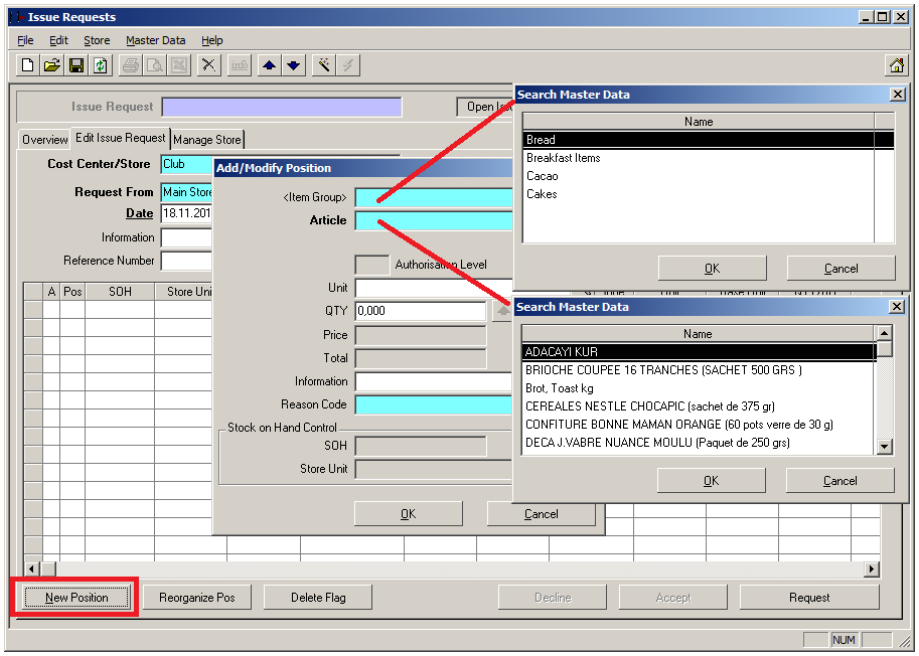


The user can select from allowed item groups only. If no filter was selected the system will populate all articles assigned to the allowed item groups.

5. ISSUE REQUESTS

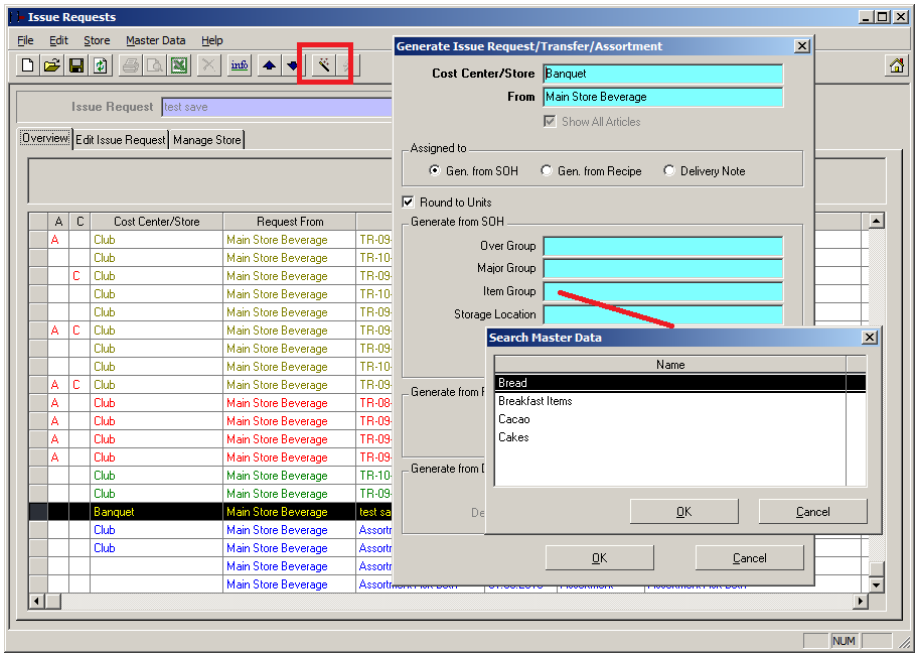
Goto Store > Issue Requests:

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.

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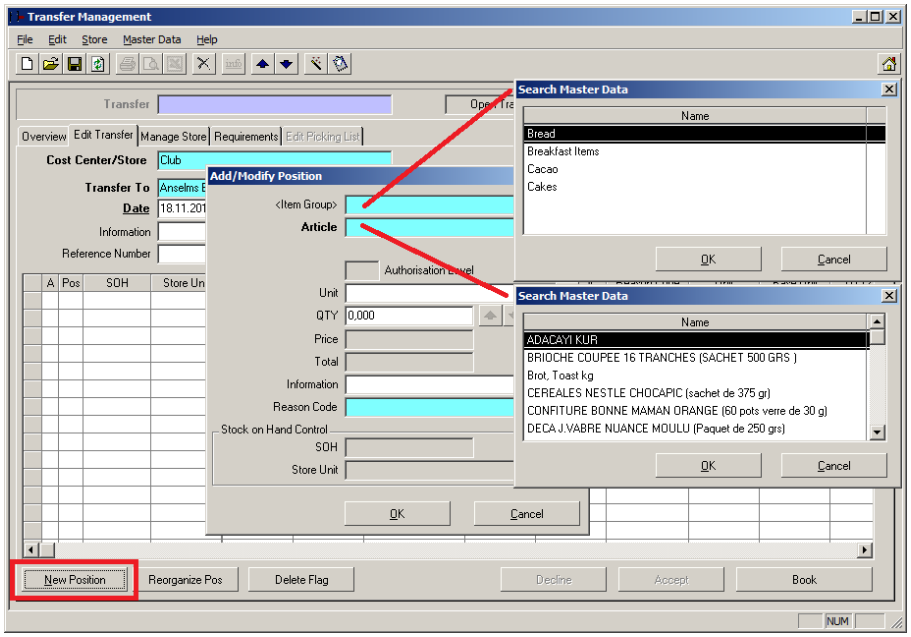
6. TRANSFERS

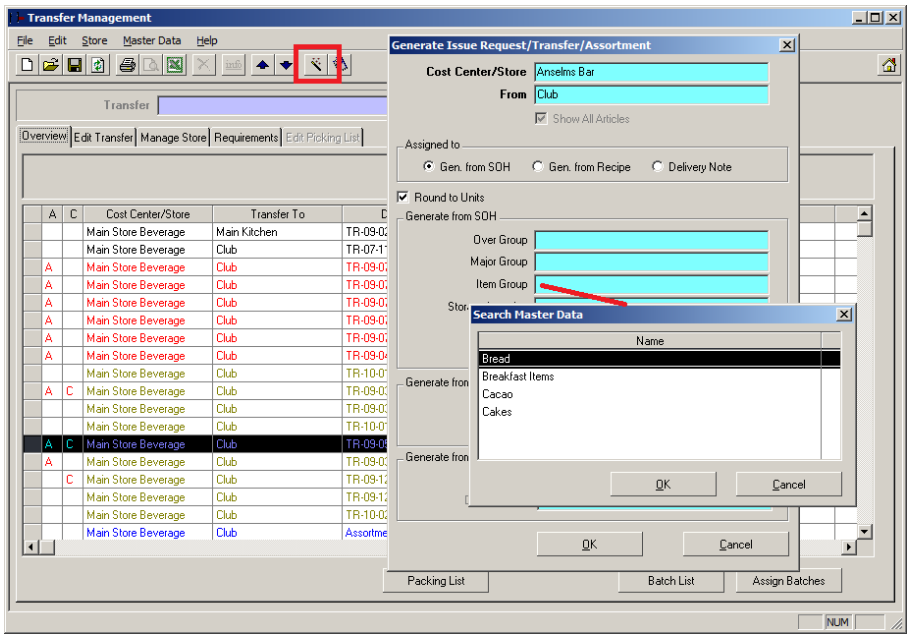
Goto Store > Transfer:

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.

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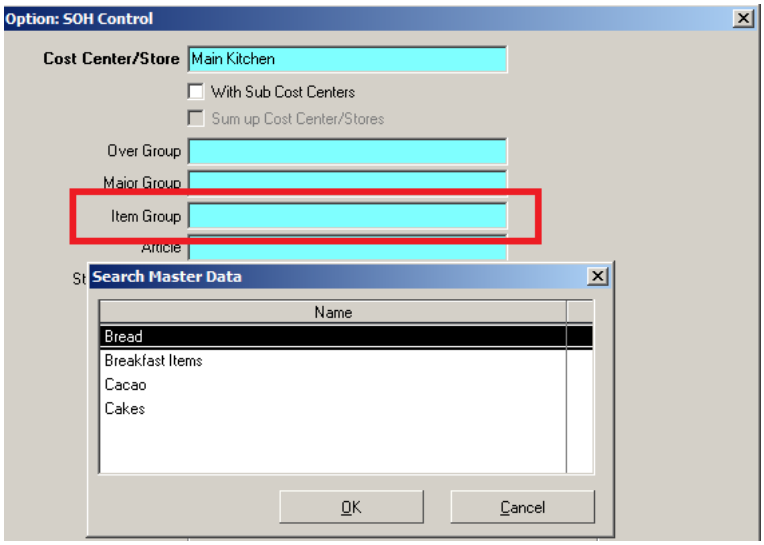
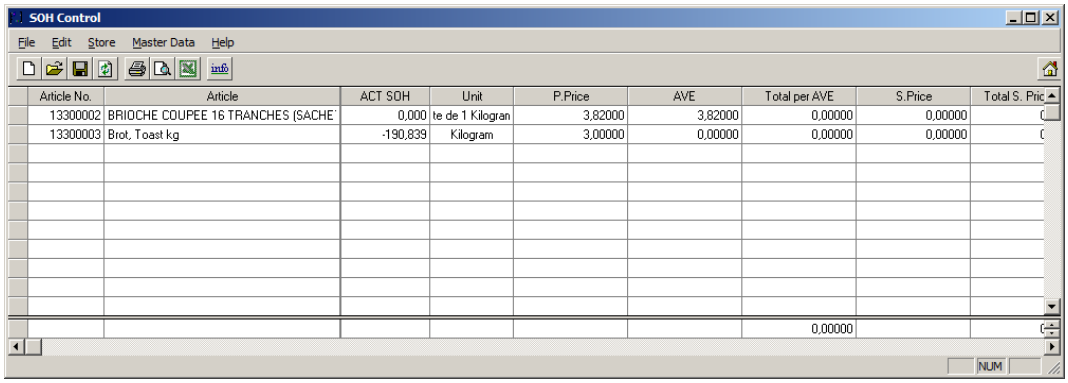
7. STOCK ON HAND CONTROL

Goto Store > SOH Control:

When using the module Stock on Hand Control this user will see the allowed item groups and assigned articles only:

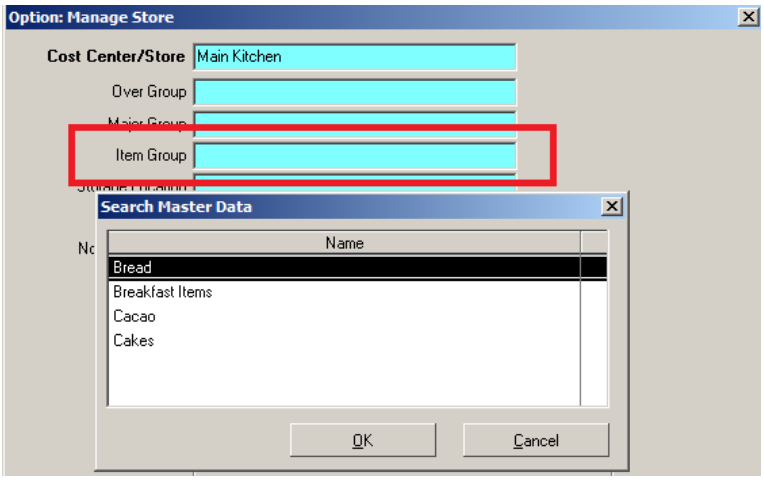


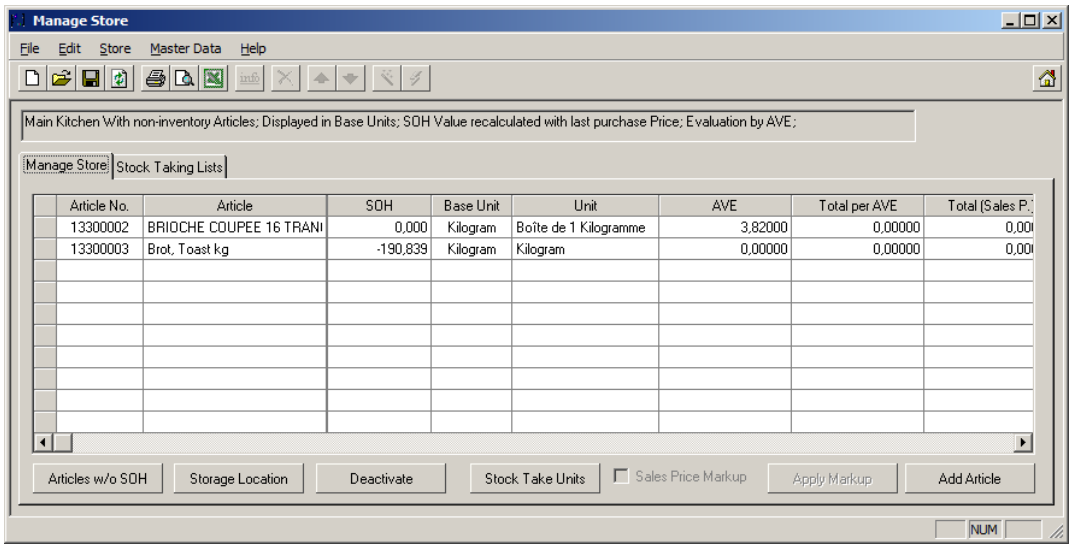


8. MANAGE STORE

Goto Store > Manage Store:

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

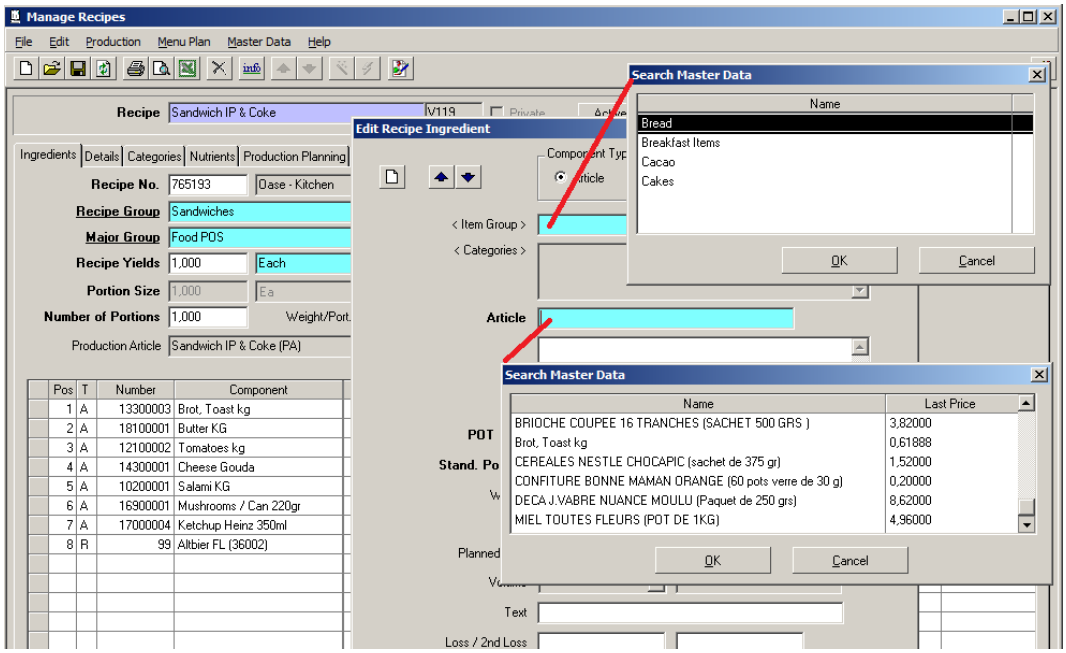




9. RECIPES

Goto Production > Manage Recipes:

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



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