

MICROS Materials Control

Purchase Orders – Internal Attachments



Product Version: **8.7.20.36.1421**

Document Title:	Attachments
Author:	Joerg Trommeschlaeger
Department:	Materials Control
Date:	19.09.2012
Version No. of Document:	1.1

Copyright © 2015, Oracle and/or its affiliates. All rights reserved.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this software or related documentation is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are "commercial computer software" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

Table of Contents

INTRODUCTION:	4
CONFIGURATION:	4
DOCUMENT STORAGE:	5
THICK CLIENT ONLY:	5
THICK CLIENT & MCWEB:	6
CONFIGURATION MCWEB:	7
CONFIGURATION IIS:	8
IIS 5.x:	8
IIS 7.x:	13
FUNCTIONALITY:	16
PURCHASE ORDERS:	16
REQUISITIONING:	17
RESOLVE REQUISITIONS:	18
PURCHASE MANAGER:	18
AUTHORIZATION:	19
RECEIVING:	19
INVOICE CONTROL:	20
MCWEB:	21
PURCHASE ORDER:	21
REQUISITIONING:	23
AUTHORIZATION:	24
RECEIVING:	24

Introduction:

This document will explain in detail the required setup for internal attachments for Purchase Orders in Materials Control.

This feature will allow the user to attach documents (e.g. DOC, PDF, etc...) to Purchase Orders, Purchase Requests and Requisitions. These attachments will be stored with the order positions and can be recalled in the order modules as well as in Authorization, Receiving and Invoice Control.

This feature is supported by the Thick Client as well as by MCweb.

The minimum required version of Materials Control is 8.6.6.30.17.1338.

Configuration:

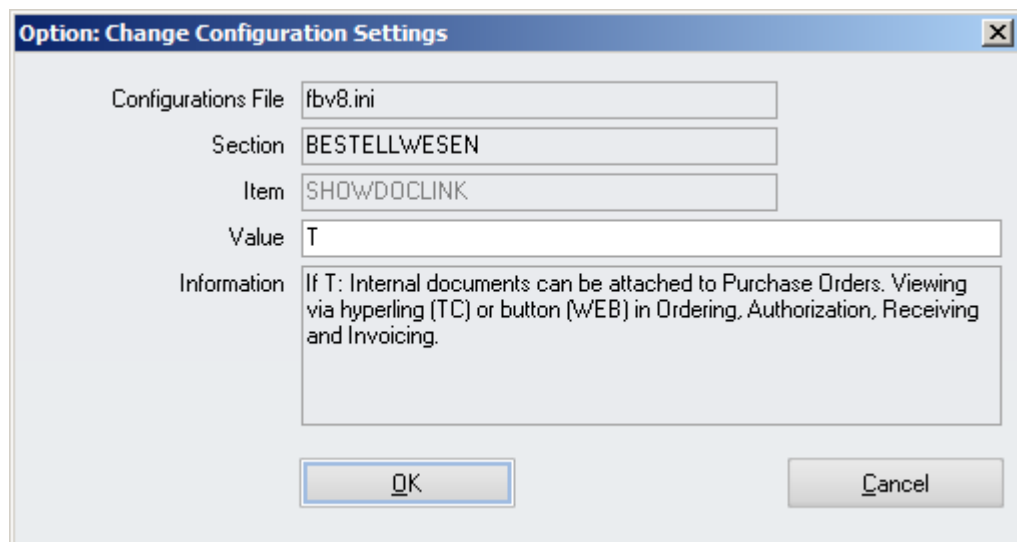
The following chapter will describe the required steps to use this functionality in both client applications.

In case MCweb is in place the configuration also for the thick client is different!

As first step the functionality must be activated in general.

Go to System > Configuration FBV8.INI > [Bestellwesen]:

Here you can find the main parameter "SHOWDOCLINK".



Set this parameter to "T" to activate the feature.

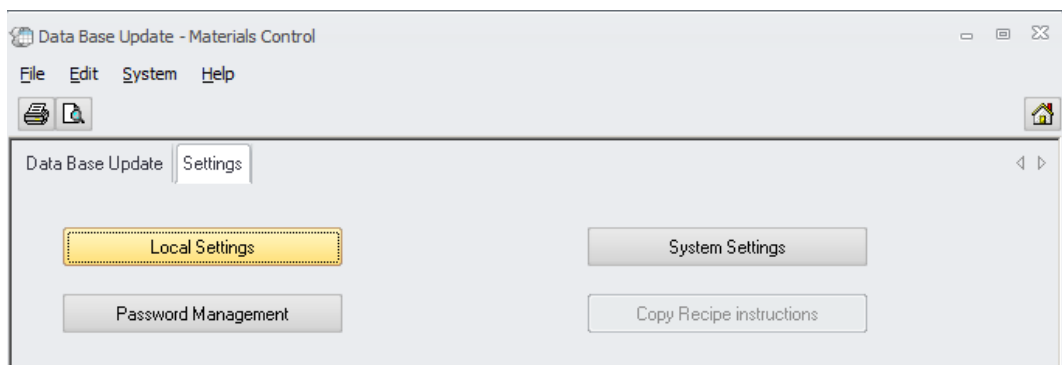
Document Storage:

In order to use this functionality a central location in the network must be defined. This location needs to be accessible for all users who should be able to access these attachments from the Thick Client. For MCweb users the IIS will link to the folder. This location should be a shared directory accessible for all users who should be able to access the files from MC.

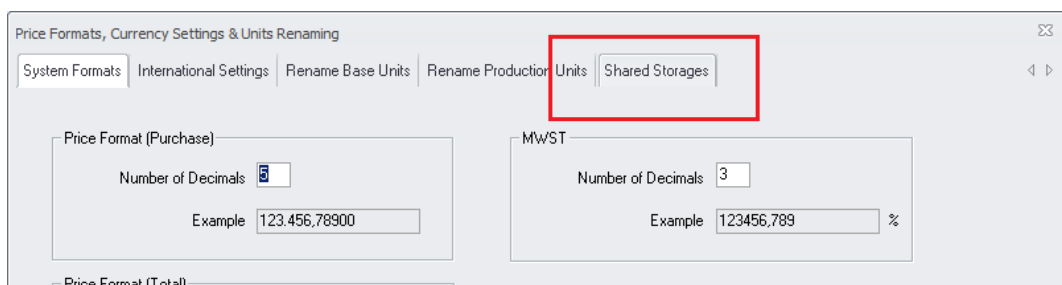
Thick Client only:

In case the classic Thick Client only will be used, this could be a shared folder anywhere in the network.

Go to System > Database Update > Settings > Local Settings:



In the next screen switch to the tab "Shared Storages"



In former versions this tab was named "Pictures". Since now also the document storage is defined here, it was decided to rename this tab.

Price Formats, Currency Settings & Units Renaming

System Formats | International Settings | Rename Base Units | Rename Production Units | **Shared Storages**

Picture Storage: C:\inetpub\wwwroot\pictures

Refresh Picture Storage

Document Storage: \\DE-N-PC09-019\Shared_Docs

OK Cancel

Here the path to the share must be defined.

Depending on the network setup either the PC name or the IP address could be used.

Thick Client & MCweb:

In case MCweb is place as well, the configuration is a bit different.

- The shared directory should be located on the webserver.
- The shared directory must contain a subdirectory named exactly the same as the Oracle connection name. This subdirectory is the real location now for the shared documents.
- In the classic Thick Client the path must be entered including the name of the subdirectory.

Price Formats, Currency Settings & Units Renaming

System Formats | International Settings | Rename Base Units | Rename Production Units | **Shared Storages**

Picture Storage: C:\inetpub\wwwroot\pictures

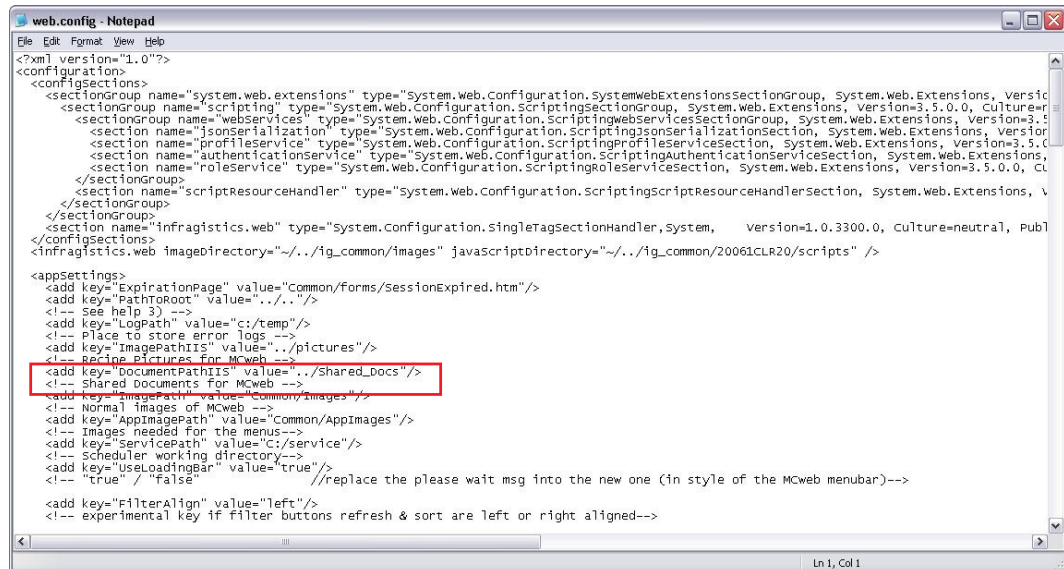
Refresh Picture Storage

Document Storage: \\DE-N-PC09-019\Shared_Docs\lbo630

OK Cancel

Configuration MCWEB:

Open the web.config of the MCweb application.



Search for the section "<appSettings>":

Here a new key must be added (if not already existing) as below shown in red:

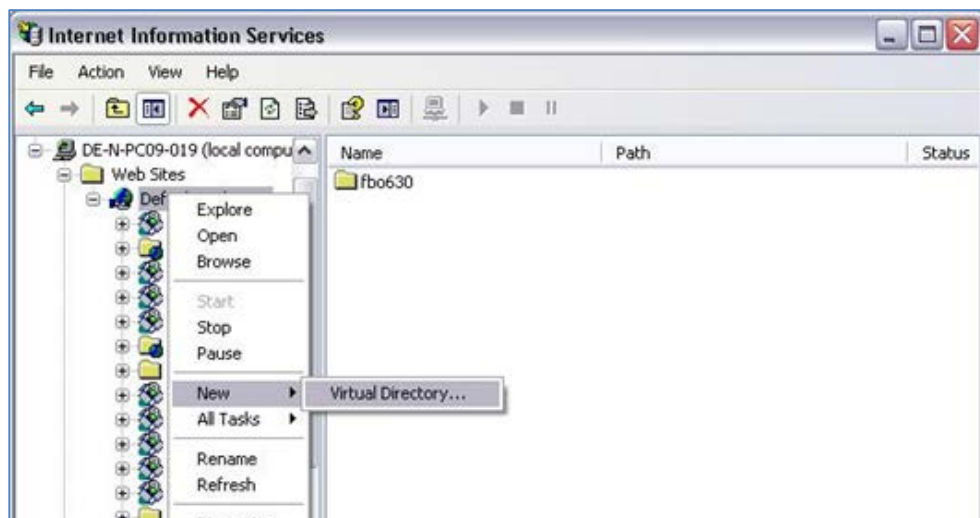
```
<appSettings>
  <add key="ExpirationPage" value="Common/forms/SessionExpired.htm"/>
  <add key="PathToRoot" value="../.."/>
  <!-- See help 3) -->
  <add key="LogPath" value="c:/temp"/>
  <!-- Place to store error logs -->
  <add key="ImagePathIIS" value="../pictures"/>
  <!-- Recipe Pictures for MCweb -->
  <add key="DocumentPathIIS" value='../Shared_Docs' />
  <!-- Shared Documents for MCweb -->
  <add key="ImagePath" value="Common/Images"/>
  <!-- Normal images of MCweb -->
  <add key="ApplImagePath" value="Common/AppImages"/>
  <!-- Images needed for the menus -->
  <add key="ServicePath" value="C:/service"/>
  <!-- Scheduler working directory -->
  <add key="UseLoadingBar" value="true"/>
  <!-- true / false //replace the please wait msg into the new one (in style of the MCweb menubar)-->
  <add key="FilterAlign" value="left"/>
  <!-- experimental key if filter buttons refresh & sort are left or right aligned-->
```

Configuration IIS:

The IIS now must be configured to offer this directory as attachment repository.

IIS 5.x

Open the IIS main screen. In the tree view on the left please mark the record "Default Web Site" and right-click to open the context menu.



Select "New" > "Virtual Directory":



Click "Next" to continue.



Here now define the name of the virtual directory. This must be the same as the name of the network share!

Click "Next" to continue.



Browse to the network share.



Virtual Directory Creation Wizard

Web Site Content Directory
Where is the content you want to publish on the Web site?

Enter the path to the directory that contains the content.

Directory:
C:\inetpub\wwwroot\Shared_Docs

Browse...

< Back Next > Cancel

Click "Next" to continue.



Virtual Directory Creation Wizard

Access Permissions
What access permissions do you want to set for this virtual directory?

Allow the following:

- ☒ Read
- ☒ Run scripts (such as ASP)
- ☐ Execute (such as ISAPI applications or CGI)
- ☐ Write
- ☐ Browse

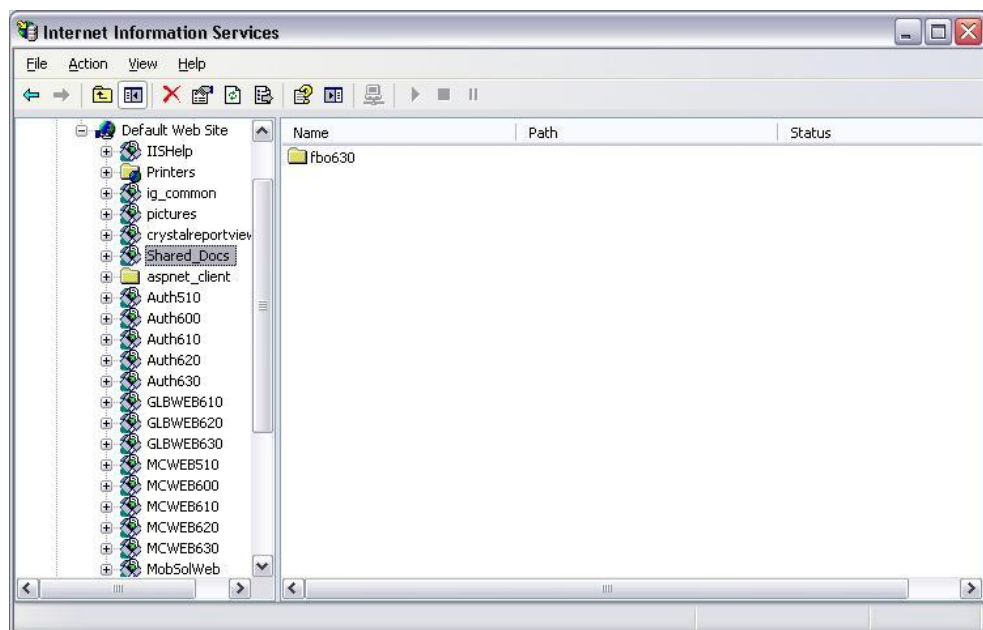
Click Next to complete the wizard.

< Back Next > Cancel

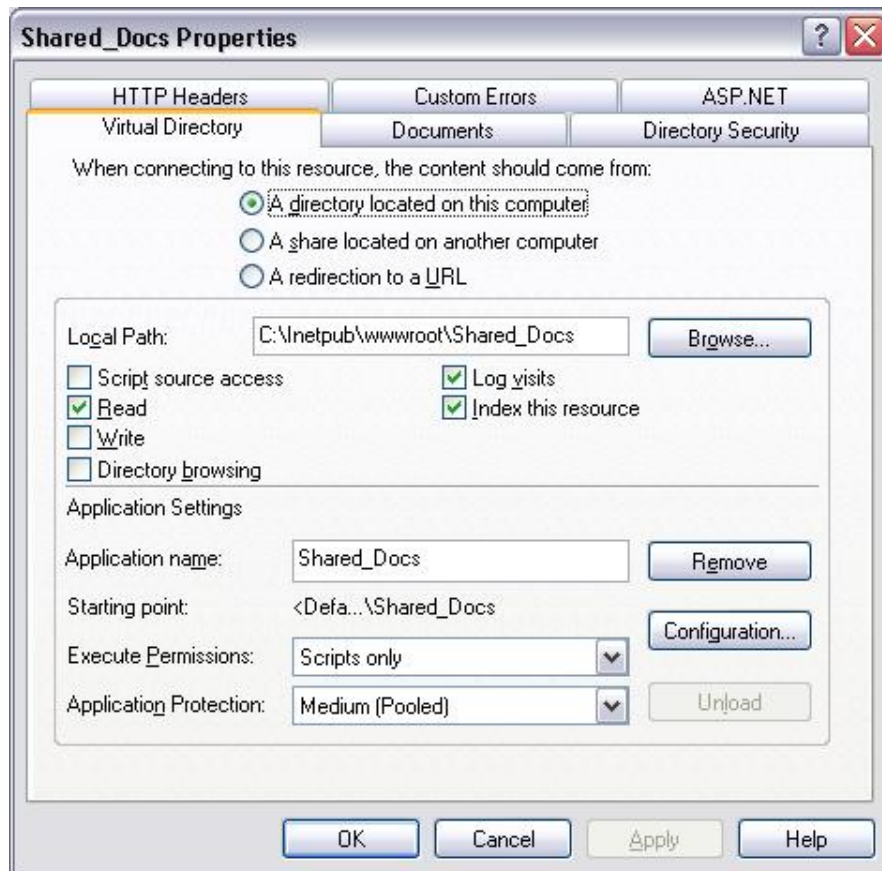
Check the Access Permissions and click "Next".



Click "Finish" to complete the wizard.



This repository will now be displayed as an application in the IIS Overview. Right click on this to check the properties.

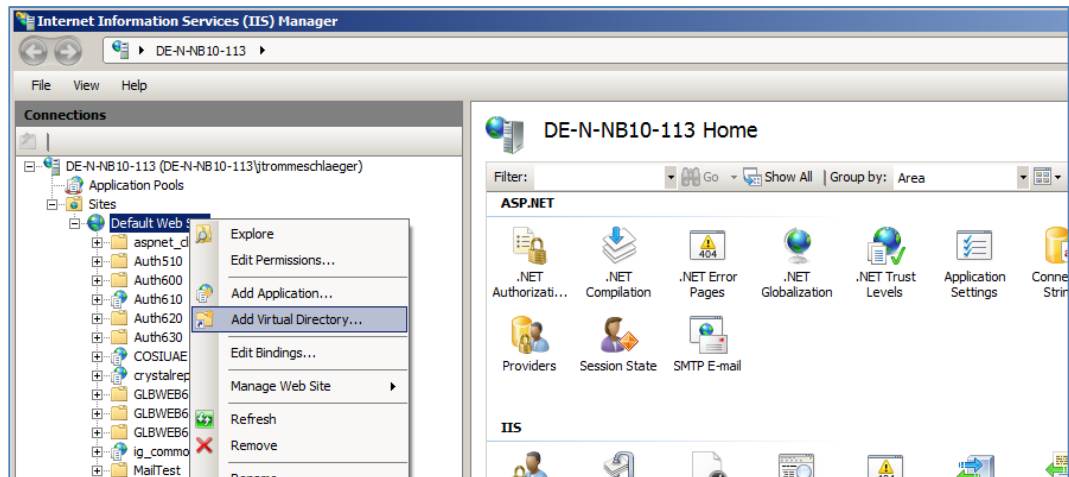


Click "OK" to close the screen.

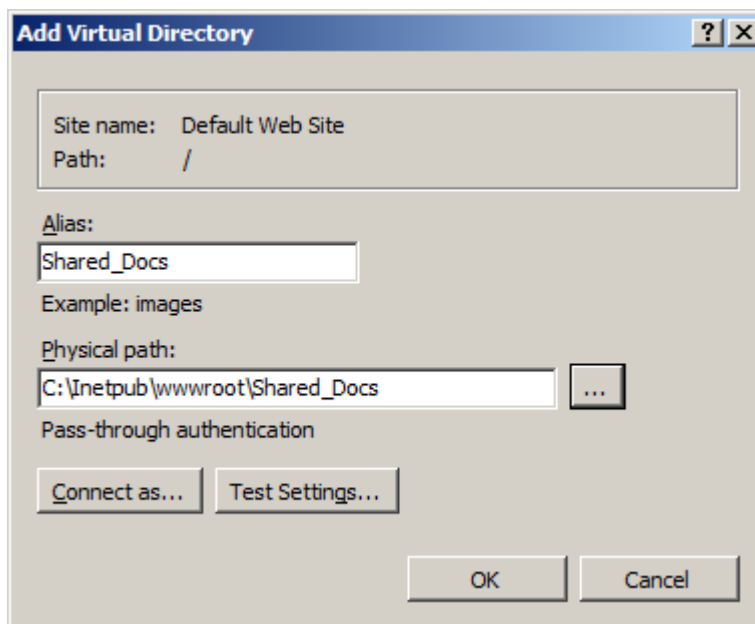
Close the IIS screen and restart it via IISRESET.

IIS 7.x

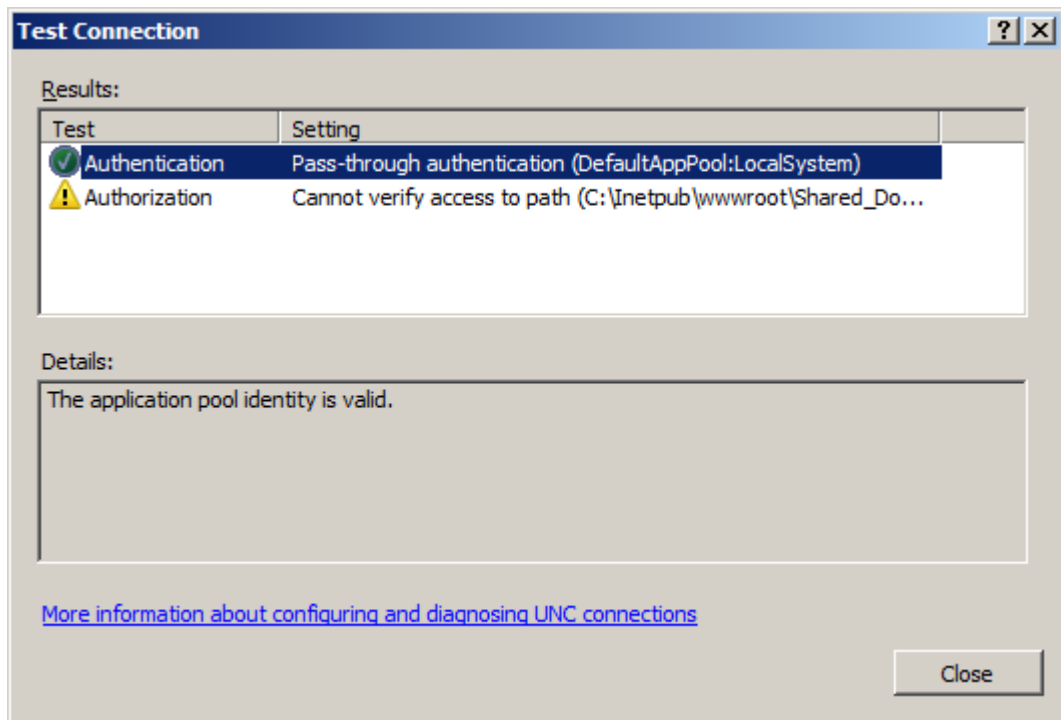
Open the IIS main screen. In the tree view on the left please mark the record “Default Web Site” and right-click to open the context menu.



Select “Add Virtual Directory”:

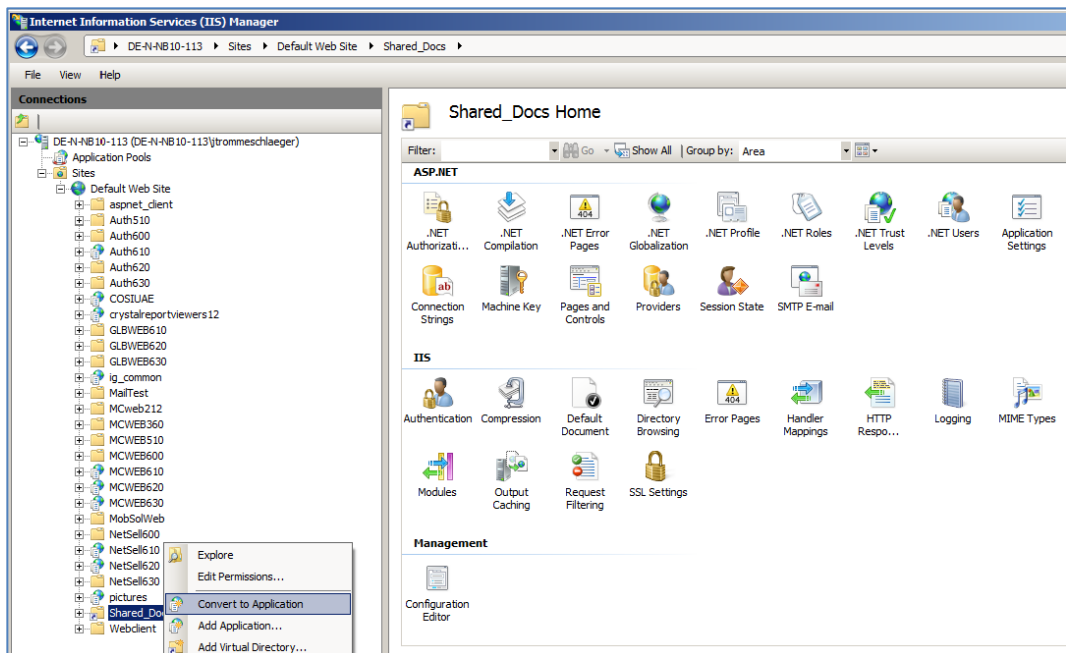


Define the alias. This must be named as the network share. Define the physical path and click on “Test Settings”:

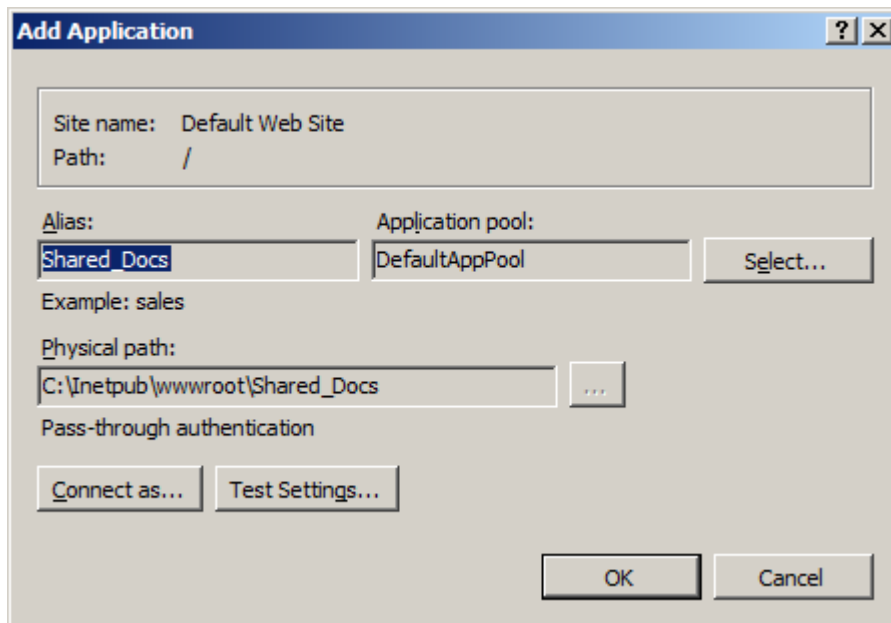


Make sure that the Authentication is marked as successful. The eventually warning sign for the Authorization can be ignored.

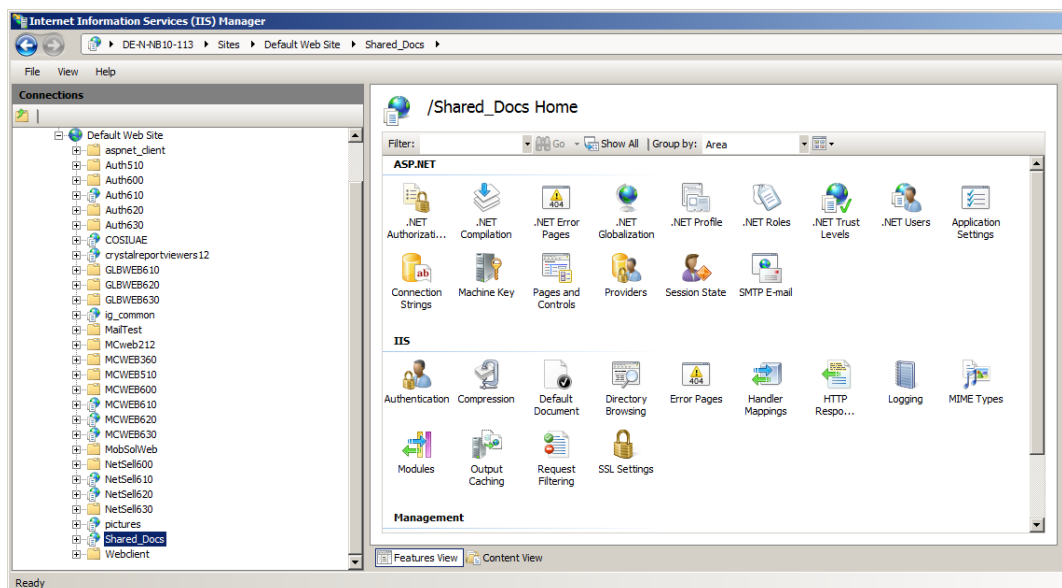
Close the screen. Now again right click the folder “Shared_Docs” in the tree view and select “Convert to Application”:



Check the definitions:



Click OK to finalize the configuration.



Now the repository will be displayed as application in the IIS.

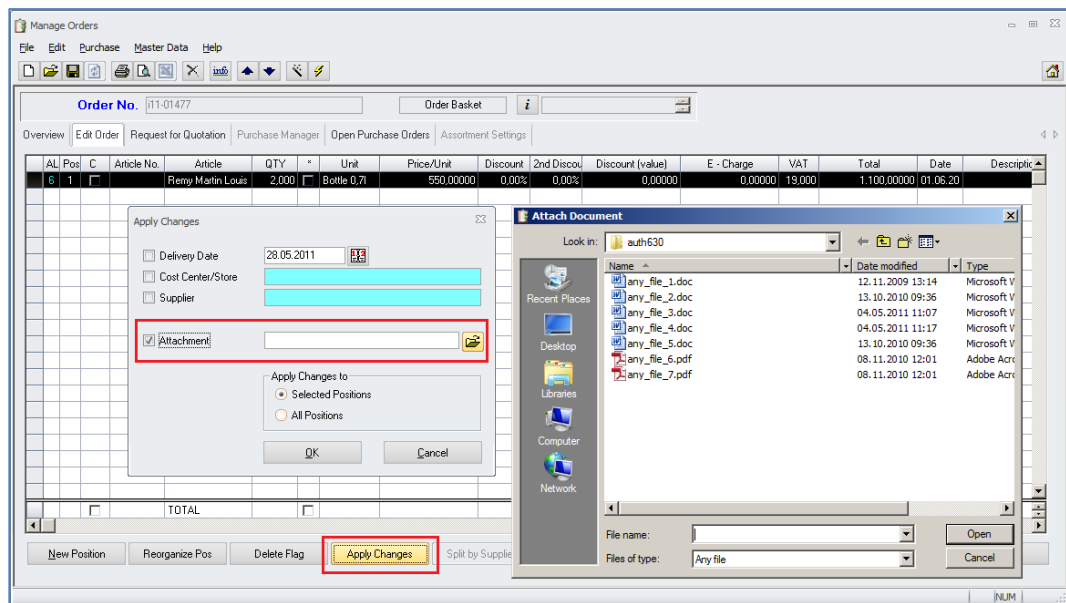
Close the IIS screen and restart it via IISRESET.

Functionality:

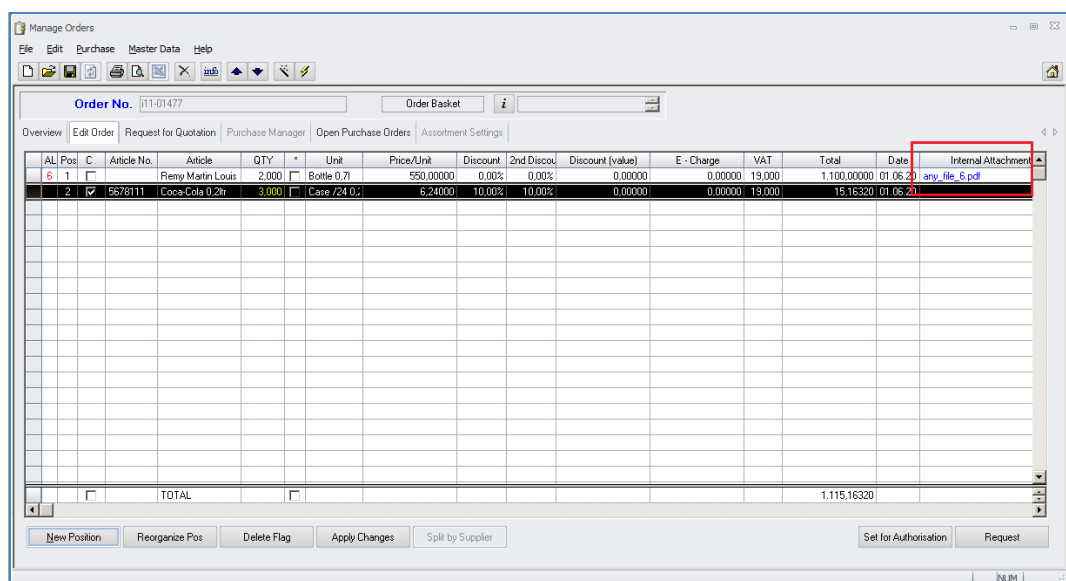
The following will show examples of the different screens where this feature can be used in the classic thick client:

Purchase Orders:

During the creation of Purchase Orders and Purchase Requests the user can attach the documents per position via the function “Apply Changes”:



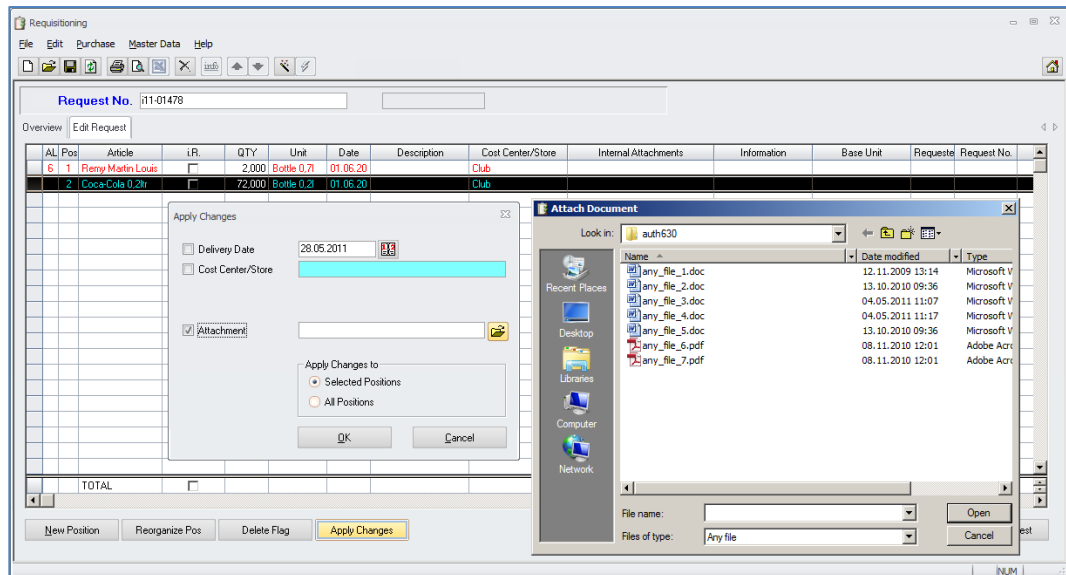
The system will open a dialog window showing the content of the shared storage. Select the document and click OK.



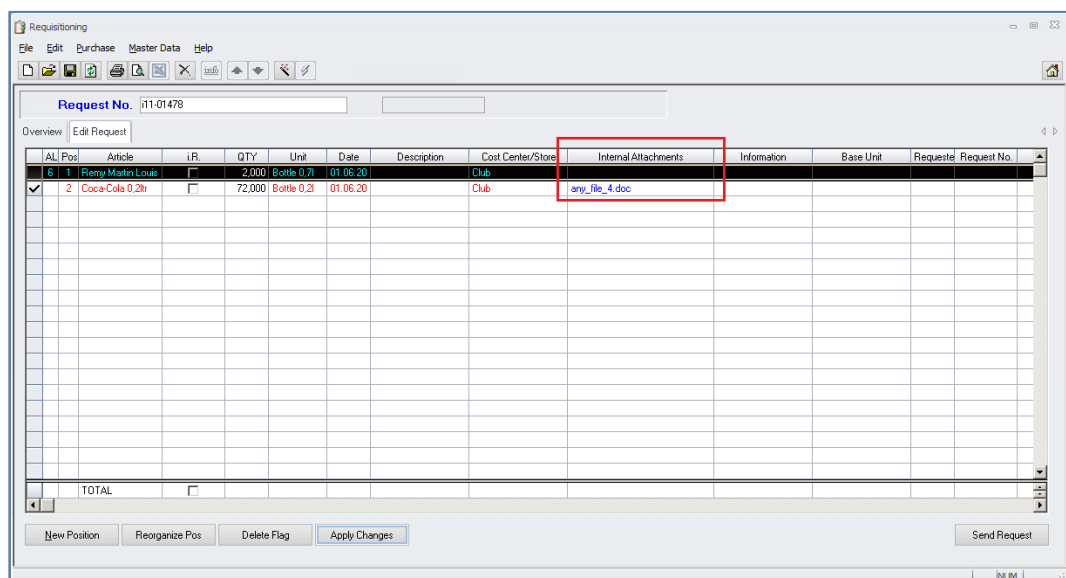
Linked documents will be shown in the column “Internal Attachments” in blue color.

Requisitioning:

During the creation of Requisitions the user can attach the documents per position via the function "Apply Changes":



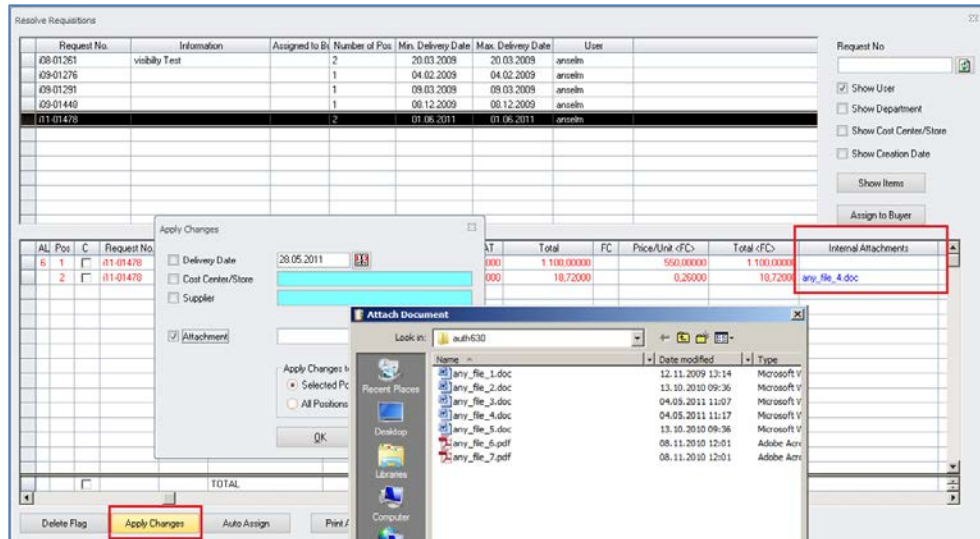
The system will open a dialog window showing the content of the shared storage. Select the document and click OK.



Linked documents will be shown in the column "Internal Attachments" in blue color.

Resolve Requisitions:

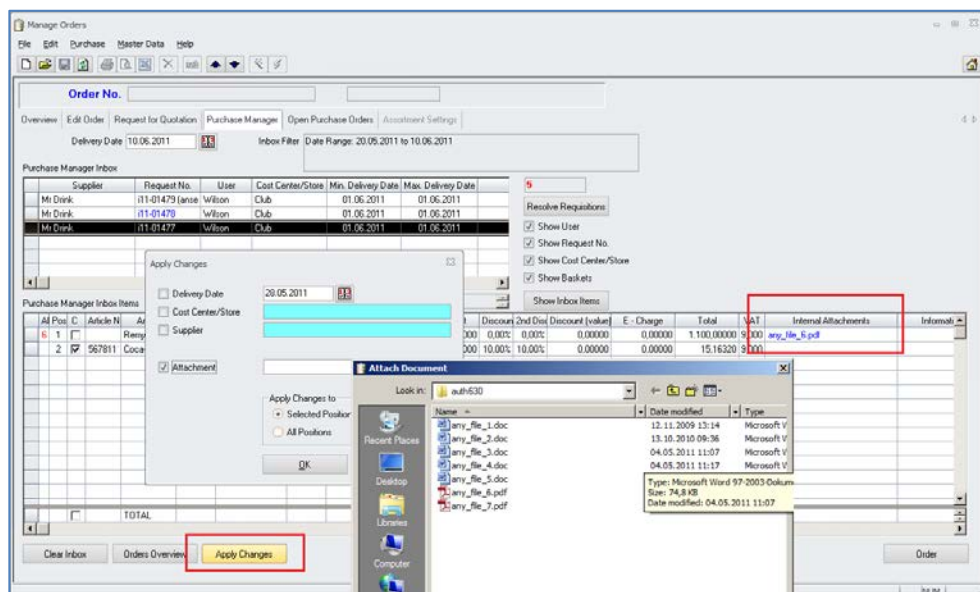
In the module “Resolve Requisitions” the user can attach the documents per position via the function “Apply Changes”:



The system will open a dialog window showing the content of the shared storage. Select the document and click OK. Linked documents will be shown in the column “Internal Attachments” in blue color.

Purchase Manager:

In the “Purchase Manager” screen the user can attach the documents per position via the function “Apply Changes”:



The system will open a dialog window showing the content of the shared storage. Select the document and click OK. Linked documents will be shown in the column “Internal Attachments” in blue color.

Authorization:

In the “Authorization” module the user can view the documents per position via click on the **blue** document name in the column “Internal Attachments”:

The screenshot shows the 'Manage Authorisation' window. The 'Order Request' tab is active, displaying a table of order items for Order #111-01479 (ansein). The table has columns: AL, Pos, C, Article No., Article, QTY, Unit, Date, Price/Unit, Discount, Total, Internal Attachments, and Discount (%). A red box highlights the 'Internal Attachments' column, which contains a blue link 'any_file_7.pdf' for position 2. Below the table is a 'TOTAL' row and a summary section with buttons for 'Total Per Supplier', 'Purchase History', 'Reject Document Authorization', and 'Authorise'.

AL	Pos	C	Article No.	Article	QTY	Unit	Date	Price/Unit	Discount	Total	Internal Attachments	Discount (%)
6	1		Remy Martin Louis XIII		2,000	Bottle 0.7l	01.06.2011	550,00000	0,00%	1.100,00000		
	2	✓	5678111	Coca-Cola 0,2ltr	3,000	Case /24 0,2ltr	01.06.2011	6,24000	10,00%	16,84800	any_file_7.pdf	
TOTAL										1.116,84800		

Receiving:

In the “Receiving” module the user can view the documents per position via click on the **blue** document name in the column “Internal Attachments”:

The screenshot shows the 'Receiving' window. The 'Edit Delivery Note' tab is active, displaying a table of delivery items for Supplier 'Mr. Drink' and Date '27.05.2011'. The table has columns: P, Pos, Article No., Article, QTY, E - Charge, Unit Cost, Net, VAT, VAT Value, Gross, Cost Center/Store, and Internal Attachment. A red box highlights the 'Internal Attachment' column, which contains a blue link 'any_file_4.doc' for position 2. Below the table is a summary section with buttons for 'New Position', 'Reorganize Pos', 'Change Status', 'Apply Changes', 'Change QTY/BU', 'Deposits', and 'Book'.

P	Pos	Article No.	Article	QTY	E - Charge	Unit Cost	Net	VAT	VAT Value	Gross	Cost Center/Store	Internal Attachment
→	1	35000002	Remy Martin Louis	2,000		550,00000	1.100,00000	19,000	209,00000	1.309,00000	Club	
→	2	31000004	Coca-Cola 0,2ltr	3,000		5,61600	16,84800	19,000	3,20112	20,04912	Club	any_file_4.doc

Invoice Control:

During Invoice Control the user can view the documents per position via click on the [blue](#) document name in the column "Internal Attachments" on the tab "Change Delivery Note":

The screenshot shows the 'Invoice Control' application window. At the top, there's a menu bar (File, Edit, Purchase, Master Data, Help) and a toolbar. Below this, a header section contains fields for Supplier (Mr Drink), Invoice No., Split-up Expenses, Invoice Date, Doc. No., and Invoice Value. A currency selector shows 'EUR'. Below the header, there's a tabbed interface with 'Change Delivery Notes' selected. The main area displays a summary of the invoice, including Date (27.05.2011), Net/VAT/Gross values, and buttons for Totals, Add. Info, and Summary. Below this is a table of invoice line items. The table has columns: P, Pos >>, Article No., Article, Ordered QTY, 2nd Discount, Discount (value), Net, Unit Cost, VAT, Gross, and Internal Attachments. Two items are listed: Position 1 (Remy Martin Louis) and Position 2 (Coca-Cola 0,2ltr). The 'Internal Attachments' column for Position 2 contains a blue link 'any_file_6.pdf', which is highlighted by a red box. Below the table, there's a section for adjustments (Adjustment, Adjustment Account, Applied on/Shipments, ADJ %, ADJ Value) and a 'TOTAL' row. At the bottom, there are buttons for New Position, Reorganize Pos, Change Status, Apply Changes, Change QTY/BU, Deposits, and Book.

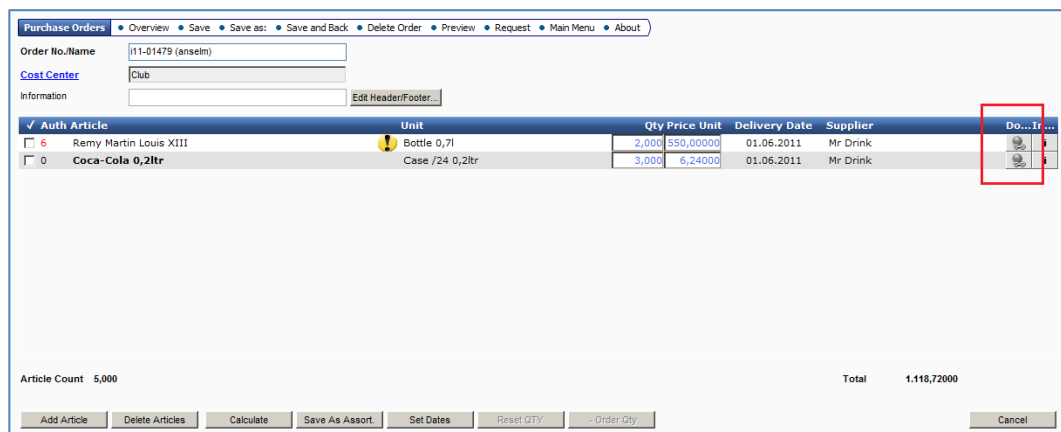
P	Pos >>	Article No.	Article	Ordered QTY	2nd Discount	Discount (value)	Net	Unit Cost	VAT	Gross	Internal Attachments
	1		Remy Martin Louis	2,000	0,00%	0,00000	1,100,00000	550,00000	19,000	1,309,00000	
	2	5678111	Coca-Cola 0,2ltr	3,000	10,00%	0,00000	15,16320	5,05440	19,000	18,44421	any_file_6.pdf

MCweb:

This part shows examples of the different screens where this feature can be used in MCweb:

Purchase Order:

During the creation of Purchase Orders and Purchase Requests the user can attach the documents per position via the hyperlink button at the right end of the screen:



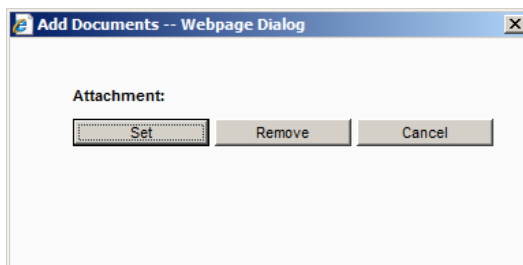
Auth	Article	Unit	Qty	Price	Unit	Delivery Date	Supplier	Do... Ir...
6	Remy Martin Louis XIII	Bottle 0,7l	2,000	550,00000		01.06.2011	Mr Drink	Do... Ir...
0	Coca-Cola 0,2ltr	Case /24 0,2ltr	3,000	6,24000		01.06.2011	Mr Drink	Do... Ir...

Article Count 5,000

Total 1,118,72000

Buttons: Add Article, Delete Articles, Calculate, Save As Assort, Set Dates, Reset QTY, -- Order Qty, Cancel

Click on this button to open the dialog window:



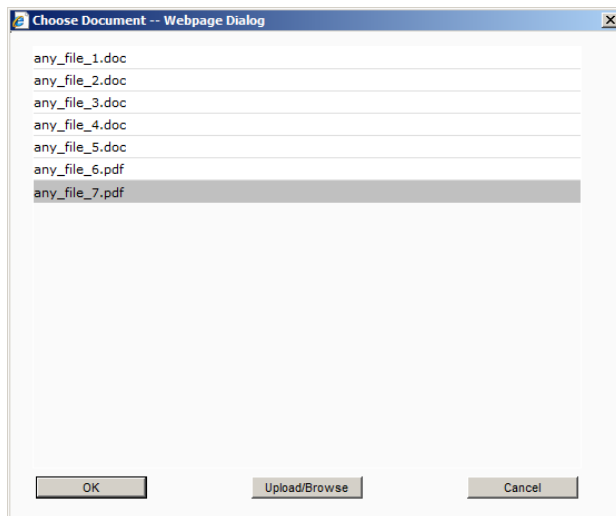
Add Documents -- Webpage Dialog

Attachment:

Buttons: Set, Remove, Cancel

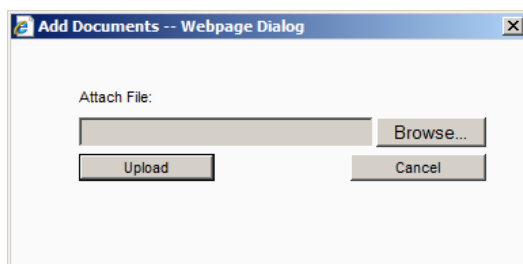
Click on "Set" to open the document selection window.
 The function "Remove" can be used to remove already linked documents from this record.
 "Cancel" should be used to close the window without saving the changes.

This screen now shows the content of the shared repository.

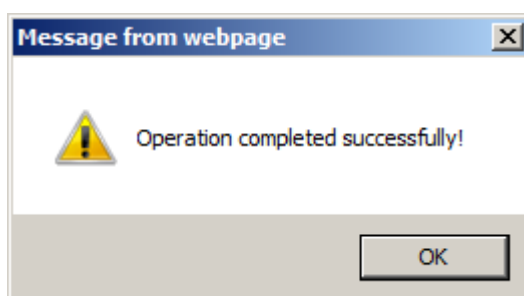


Mark a document and click on “OK” to select it.

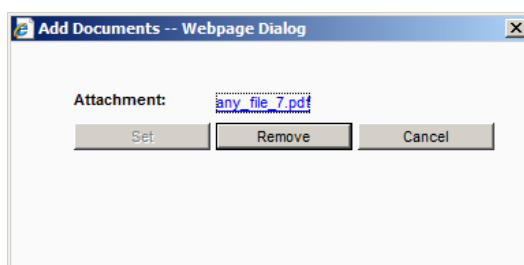
Since a MCweb user might not have direct access to the repository via the Explorer also the option to upload documents is available here. Click on “Upload/Browse” to select a document on the local environment and upload it to the repository.



Once the upload was done the system will show the following confirmation message:



After this, or if there was already a document attached it will be displayed as below:



Once a document is linked to a record the grey icon will become colored:

Auth Article	Unit	Qty	Price	Unit	Delivery Date	Supplier	Do... In...
<input type="checkbox"/> 6 Remy Martin Louis XIII	Bottle 0,7l	2,000	\$50,00000		01.06.2011	Mr Drink	
<input type="checkbox"/> 0 Coca-Cola 0,2ltr	Case /24 0,2ltr	3,000	6,24000		01.06.2011	Mr Drink	

Article Count: 5,000 Total: 1.110,72000

Buttons: Add Article, Delete Articles, Calculate, Save As Assort, Set Dates, Reset QTY, - Order Qty, Cancel

On clicking this colored icon the system will show the dialog and the user can open the attachment:

Add Documents -- Webpage Dialog

Attachment: any_file_7.pdf

Buttons: Set, Remove, Cancel

Requisitioning:

- Not yet implemented. Will be added in one of the next releases.

Authorization:

Similar as in the "Purchase Order" module also here the users can attach documents or review already existing links.

Receiving:

Similar as in the other modules also here the users can review already existing links.

Adding of new documents is not possible here.

MICROS-FIDELIO GmbH
Europadamm 2-6
41460 Neuss
Germany
Phone: +49 2131-137 0 | Fax: +49 2131-137 777