MICROS Materials Control

Purchase Orders – Internal Attachments

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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:

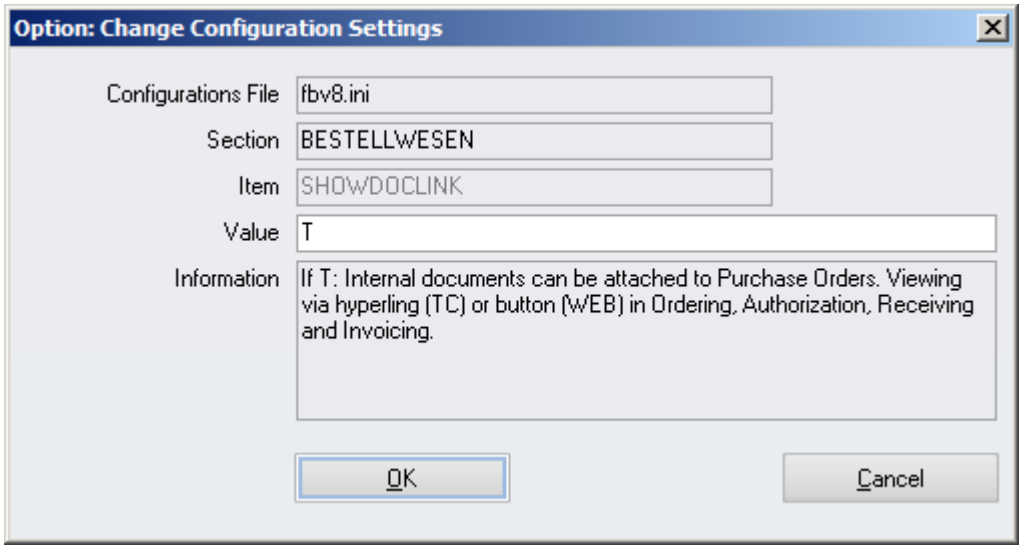
The following chapter will describe the required steps to use this functionality in both client applications.

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.

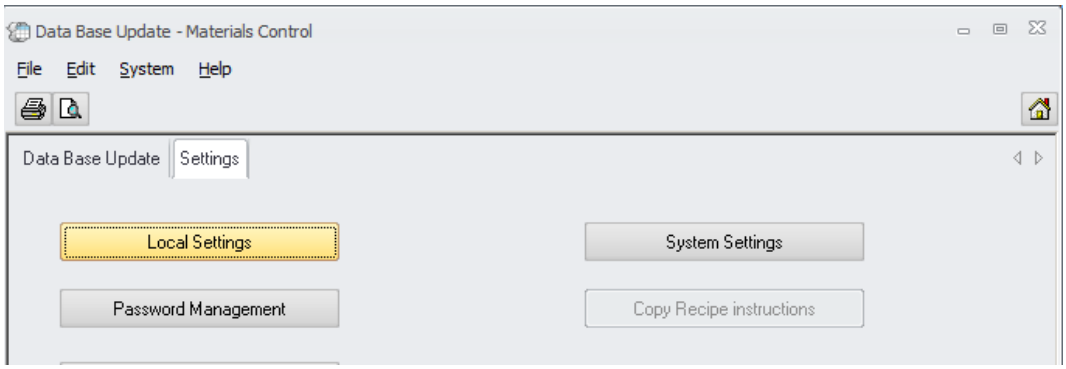
Document Storage:

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.

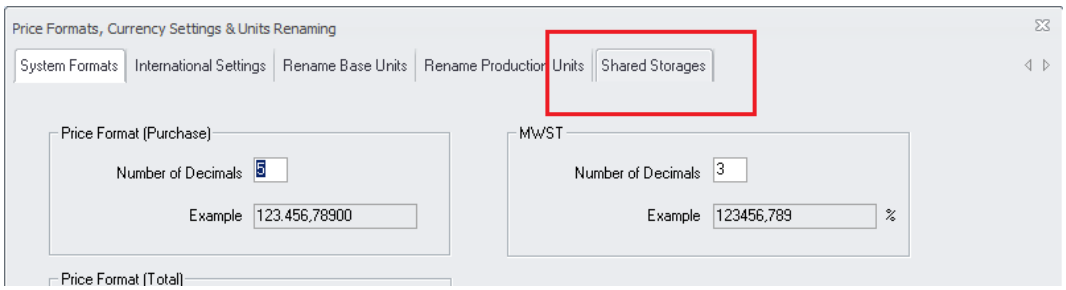
Thick Client only:

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

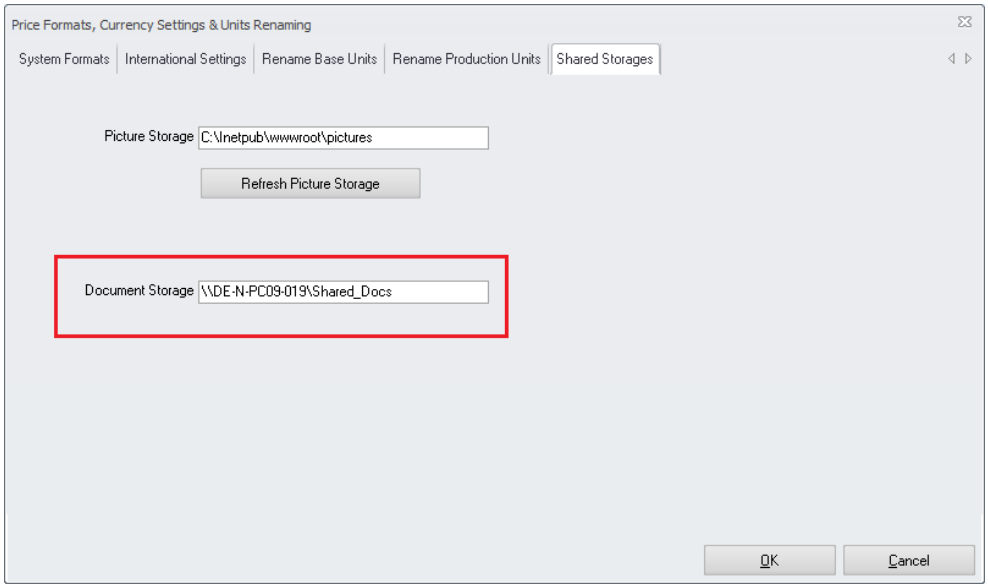
Go to System > Database Update > Settings > Local Settings:



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.



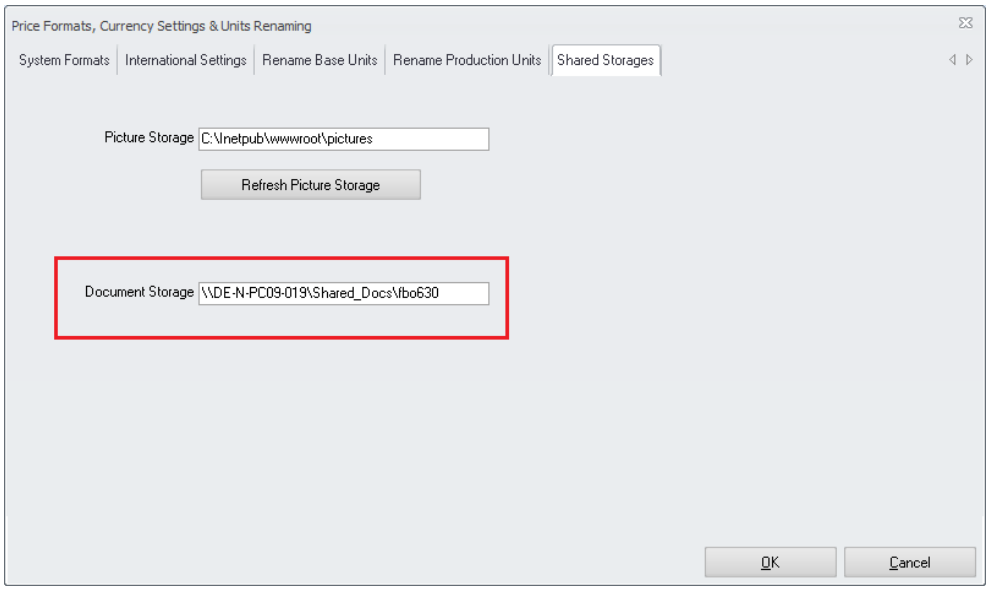
Here the path to the share must be defined.

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

Thick Client & MCweb:

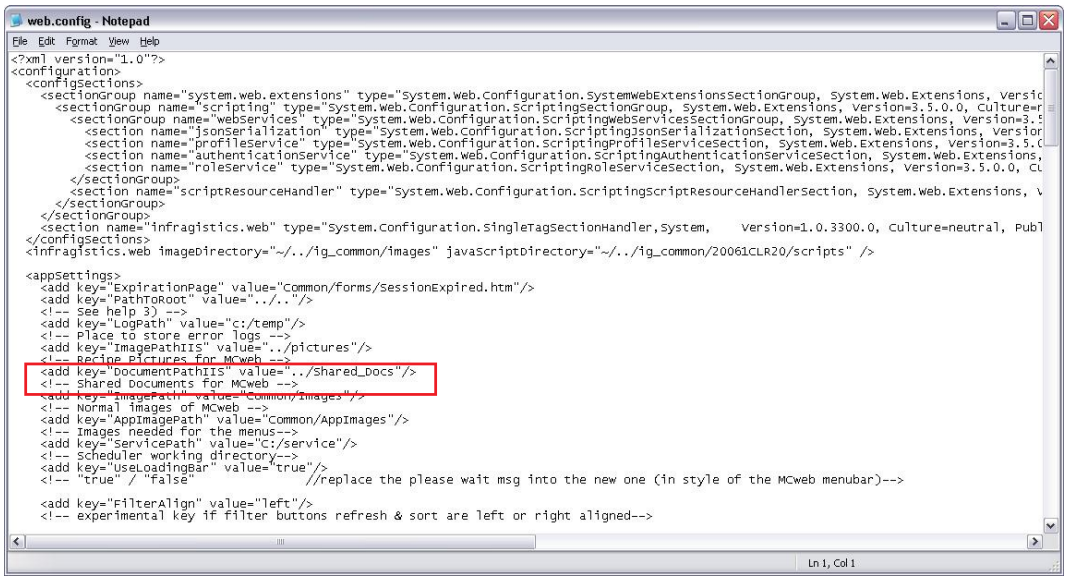
In case MCweb is place as well, the configuration is a bit different.

a) The shared directory should be located on the webserver.
b) 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.
c) In the classic Thick Client the path must be entered including the name of the subdirectory.



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:

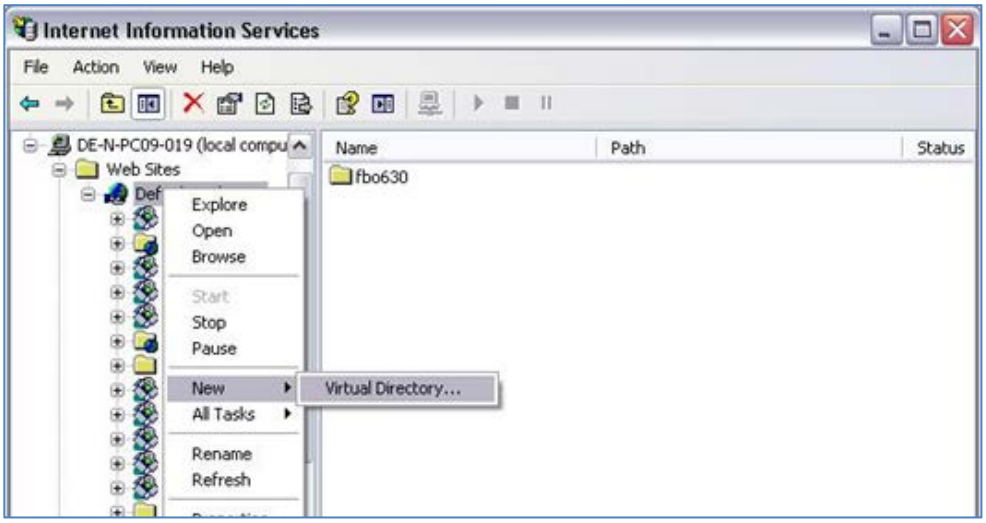
```
<appSettings>
  <add key="ExpirationPage" value="Common/forms/SessionExpired.htm"/>
  <add key="PathToRoot" value="../.."/>
  <!-- See help 3) -->
  <add key="LogPath" value="c:/temp"/>
  <!-- Place to store error logs -->
  <add key="ImagePathIIS" value="../pictures"/>
  <!-- Recipe Pictures for MCweb -->
  <add key="DocumentPathIIS" value="../Shared_Docs"/>
  <!-- Shared Documents for MCweb -->
  <add key="ImagePath" value="Common/Images"/>
  <!-- Normal images of MCweb -->
  <add key="AppImagePath" value="Common/AppImages"/>
```

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.

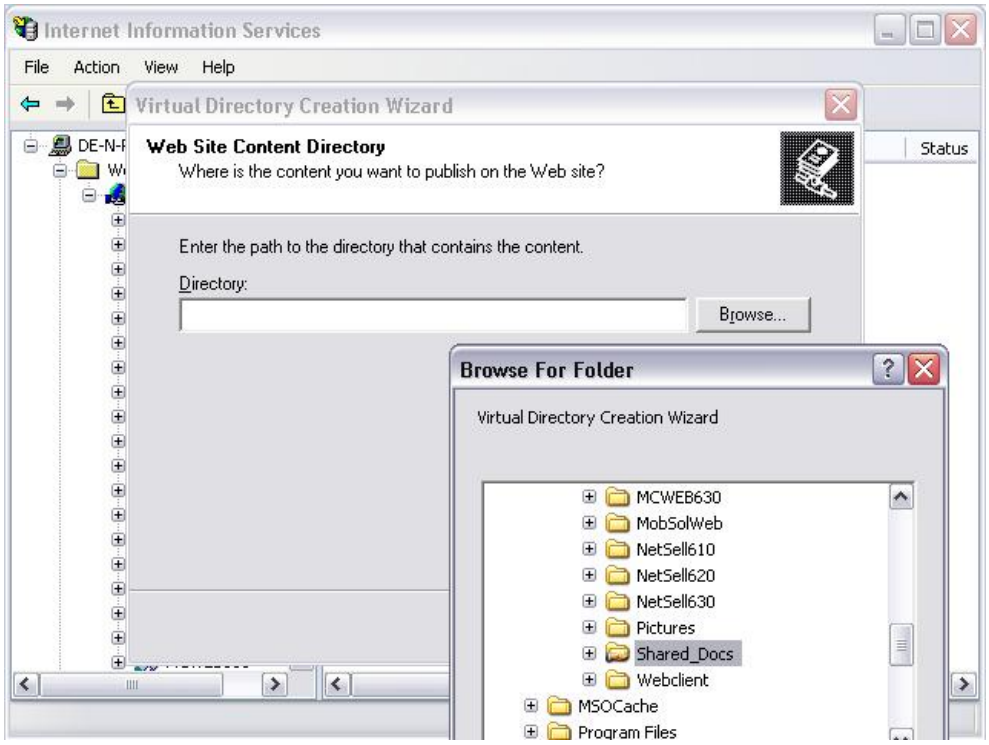


Select “New” > “Virtual Directory”:

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.

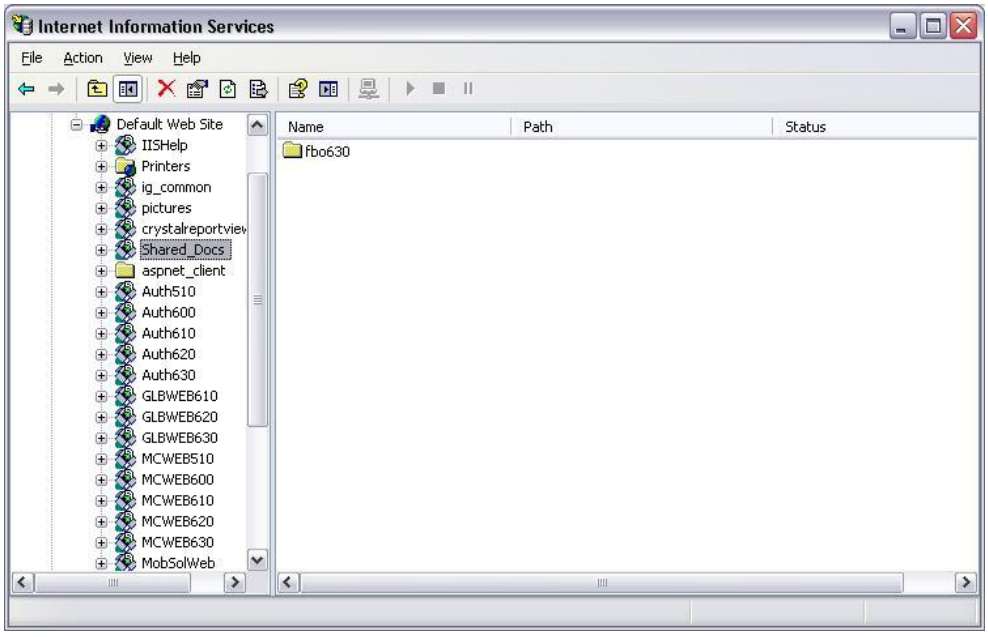


Browse to the network share.

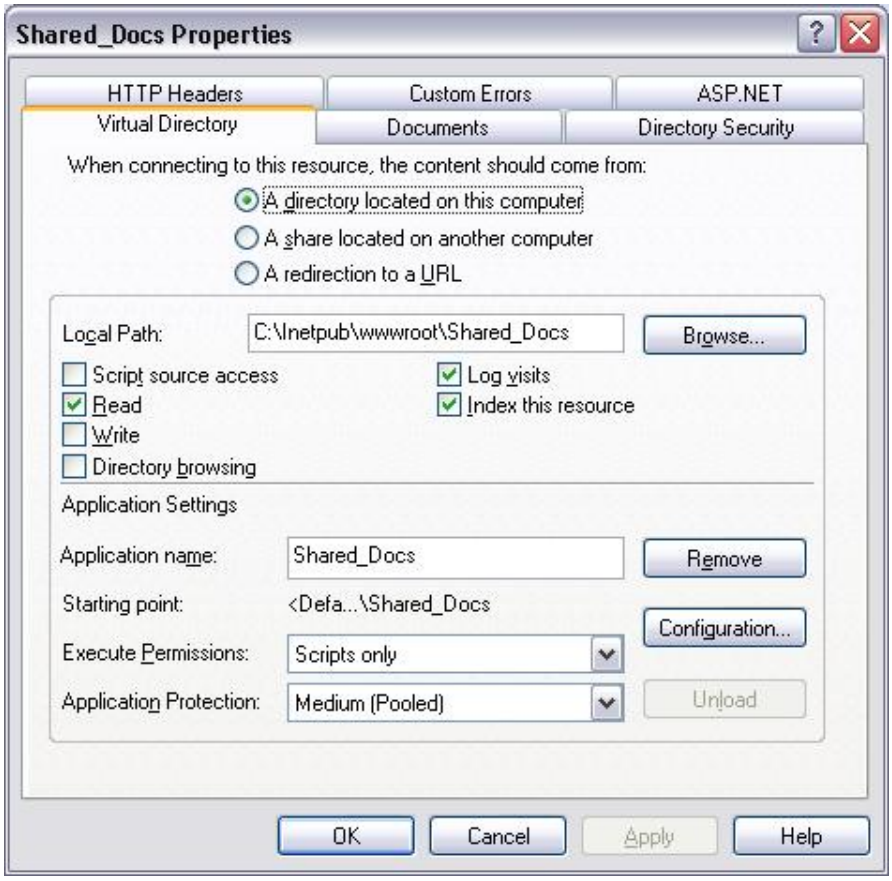
Click “Next” to continue.

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.

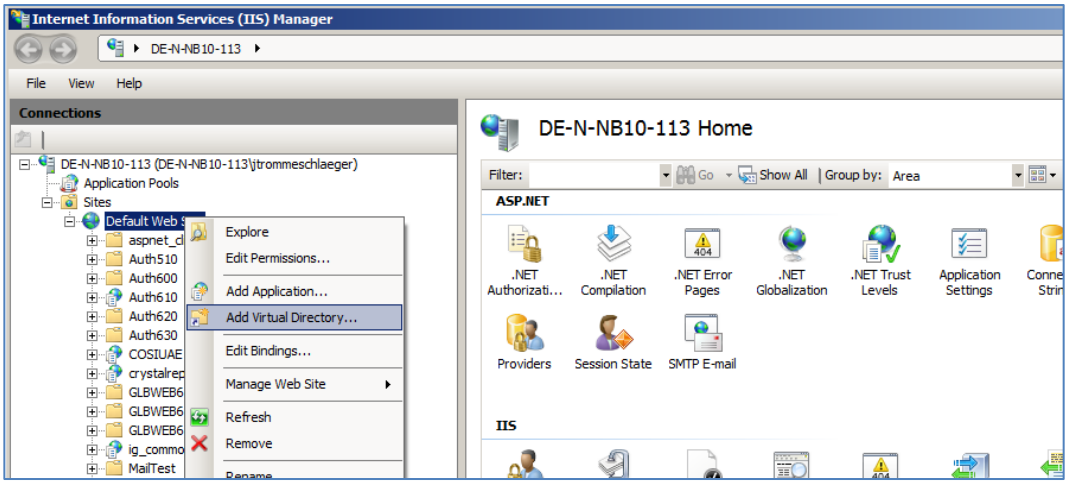


Click “OK” to close the screen.

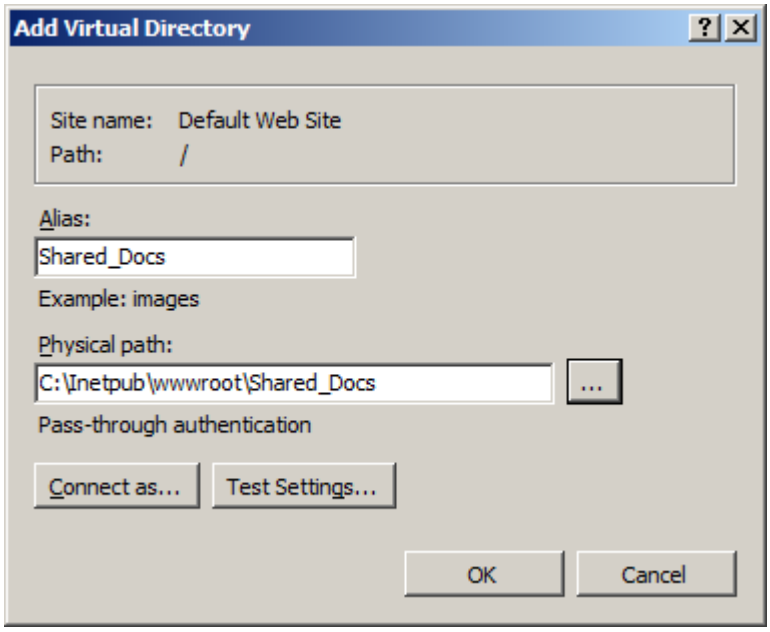
Close the IIS screen and restart it via IISRESET.

IIS 7.x

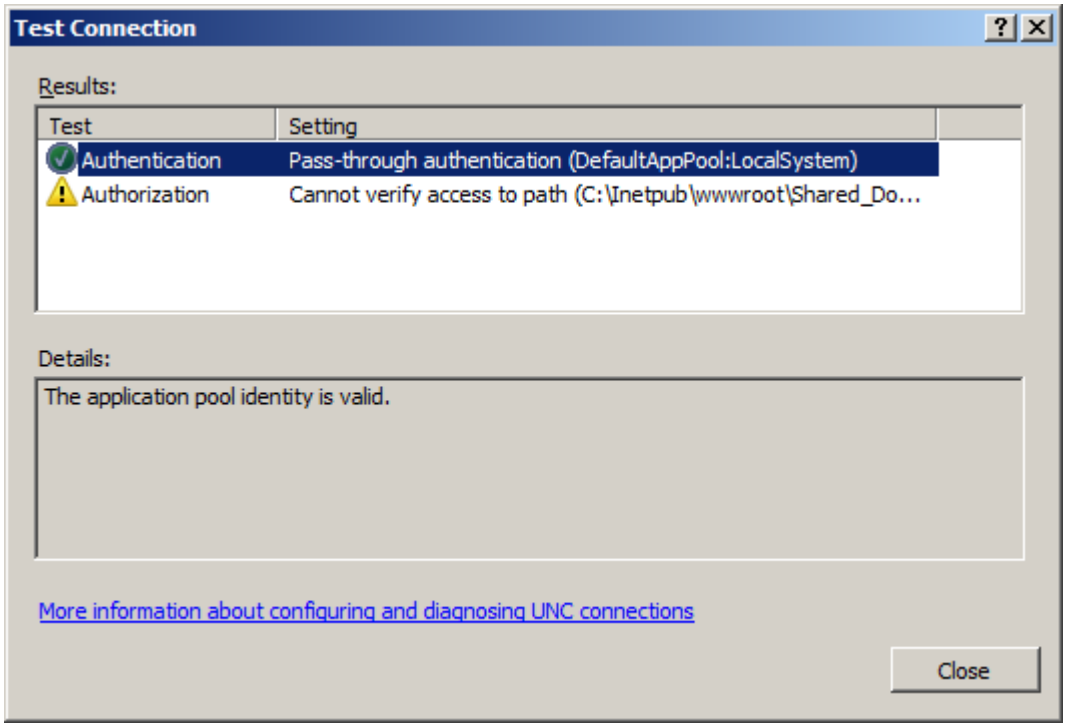
Open the IIS main screen. In the tree view on the left please mark the record “Default Web Site” and right-click to open the context menu.



Select “Add Virtual Directory”:

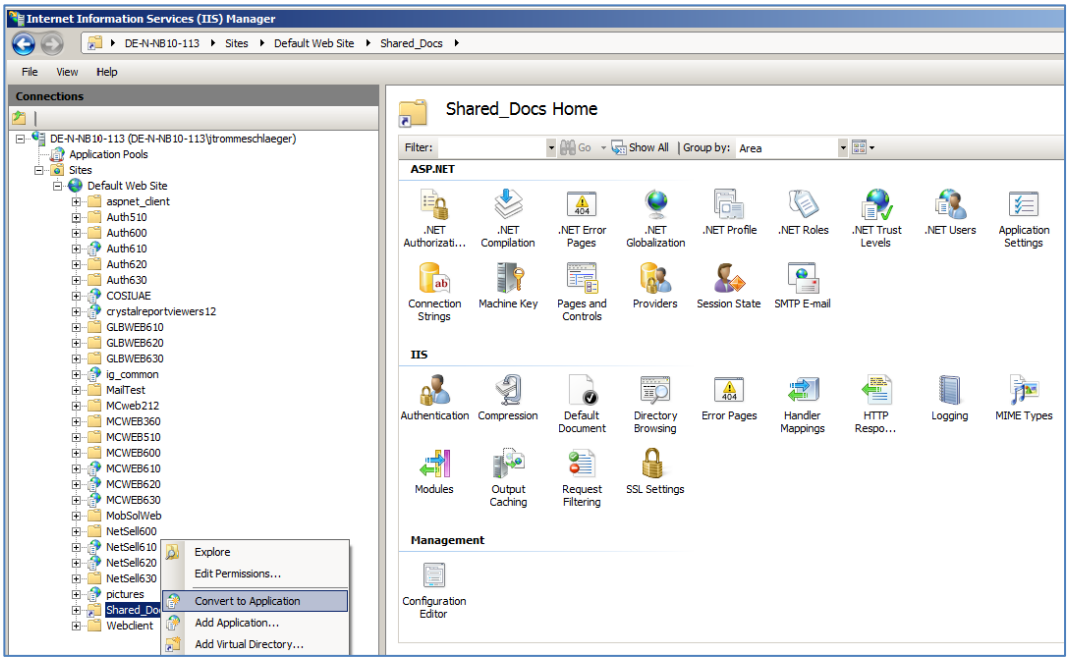


Define the alias. This must be named as the network share. Define the physical path and click on “Test Settings”:

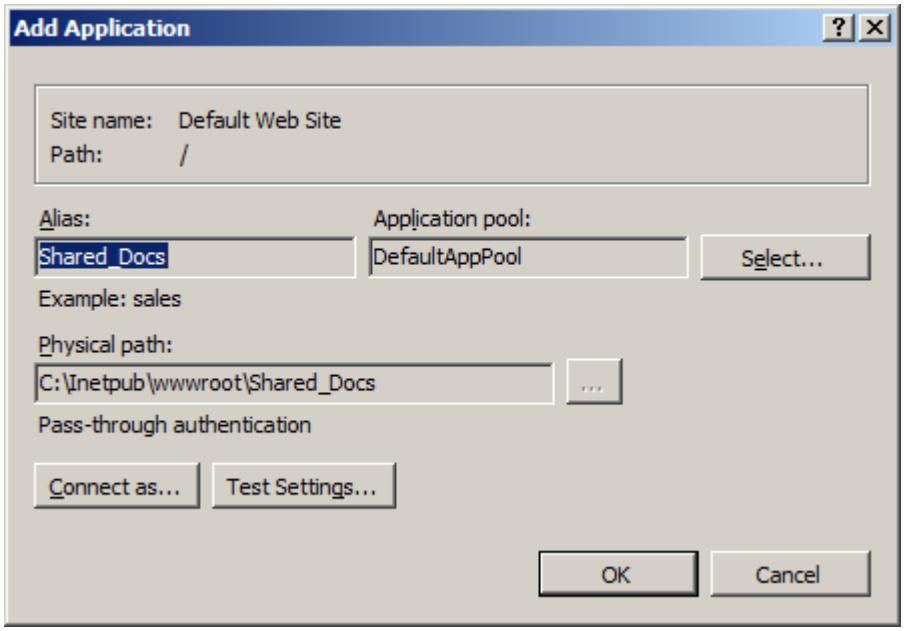


Make sure that the Authentication is marked as successful. The eventually warning sign for the Authorization can be ignored.

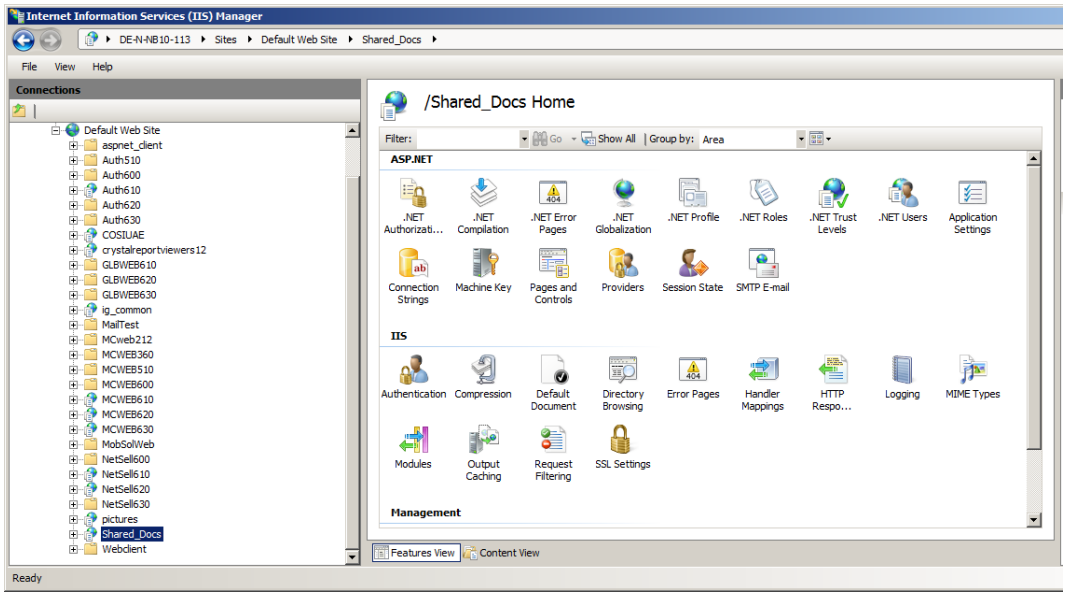
Close the screen. Now again right click the folder “Shared_Docs” in the tree view and select “Convert to Application”:



Check the definitions:



Click OK to finalize the configuration.



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

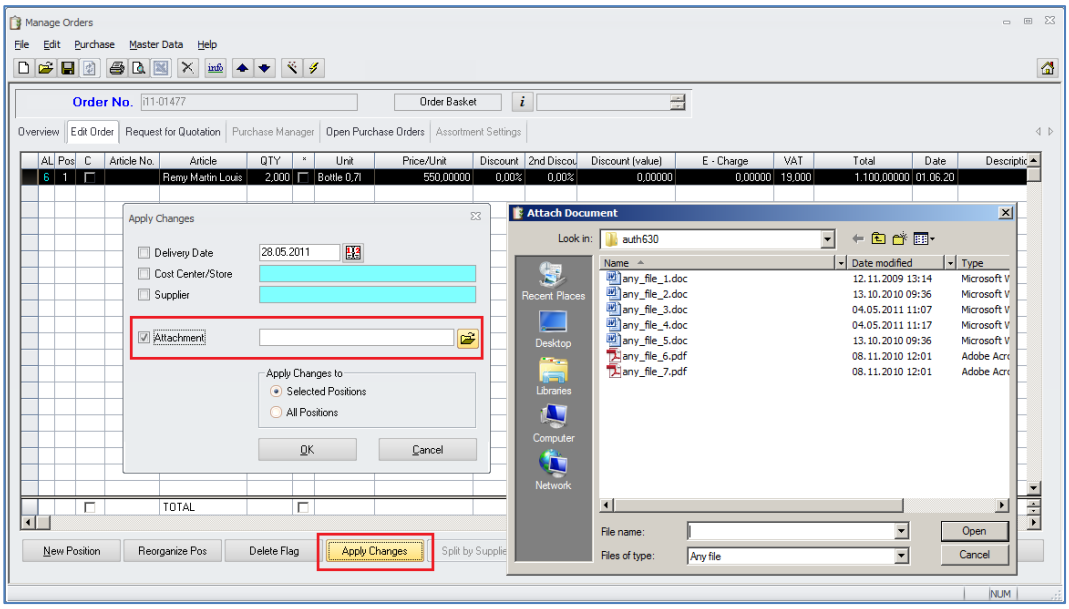
Close the IIS screen and restart it via IISRESET.

Functionality:

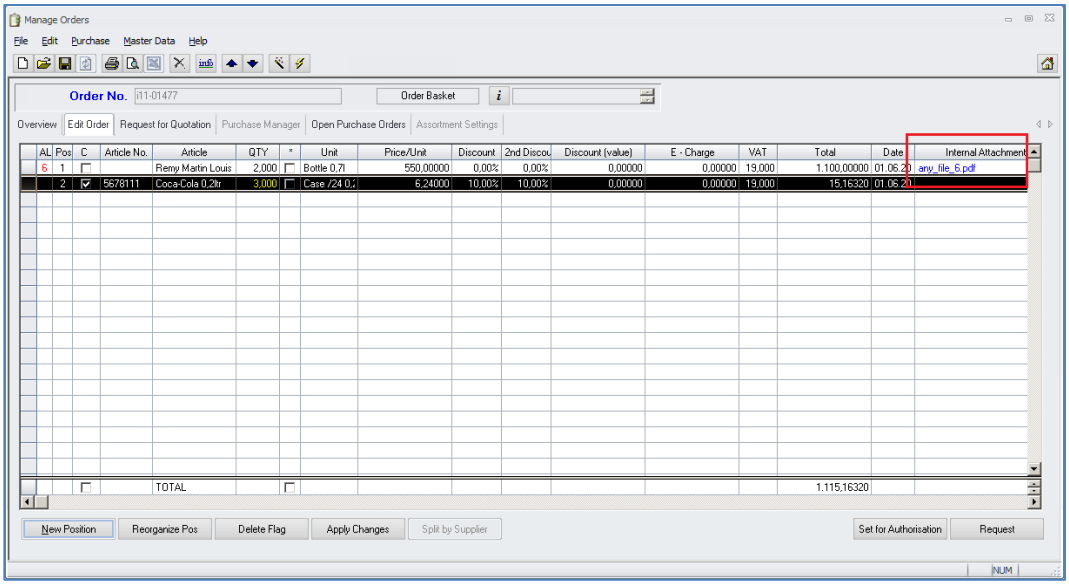
The following will show examples of the different screens where this feature can be used in the classic thick client:

Purchase Orders:

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



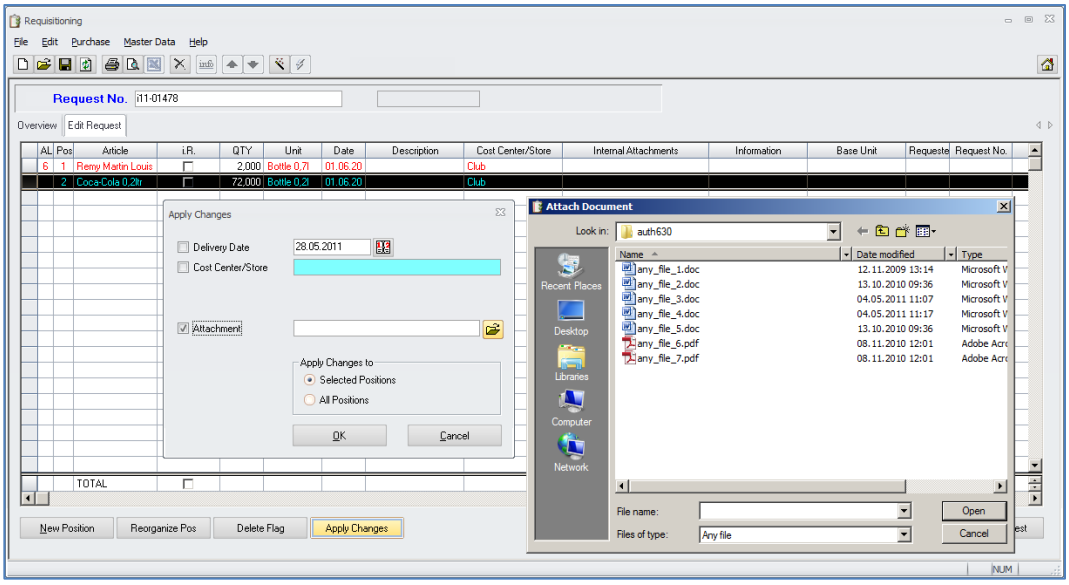
The system will open a dialog window showing the content of the shared storage. Select the document and click OK.



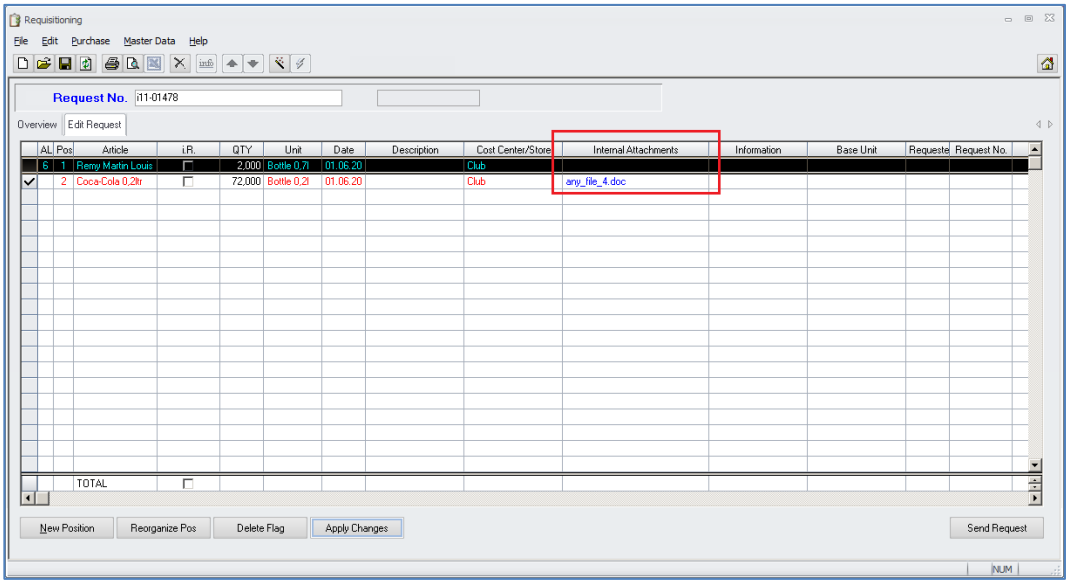
Linked documents will be shown in the column “Internal Attachments” in blue color.

Requisitioning:

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



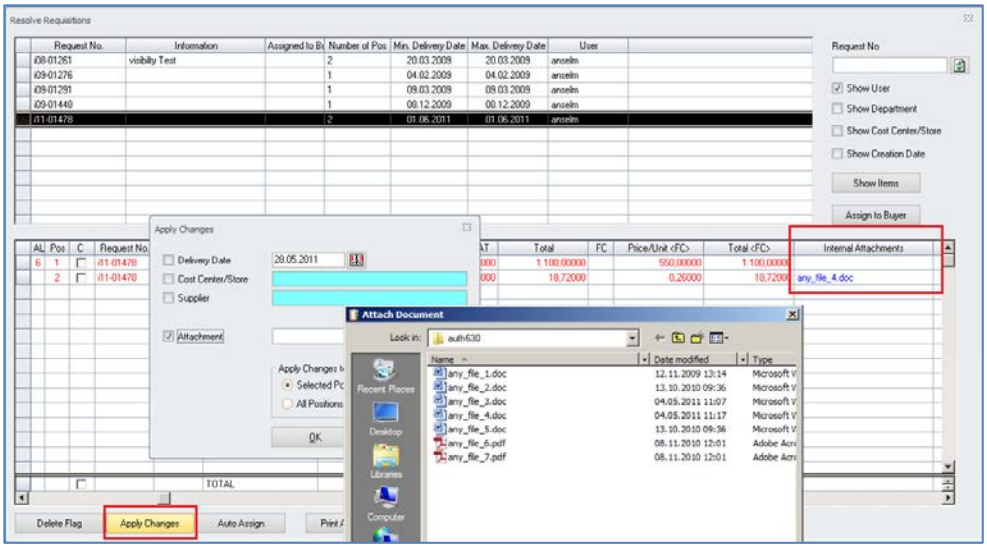
The system will open a dialog window showing the content of the shared storage. Select the document and click OK.



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

Resolve Requisitions:

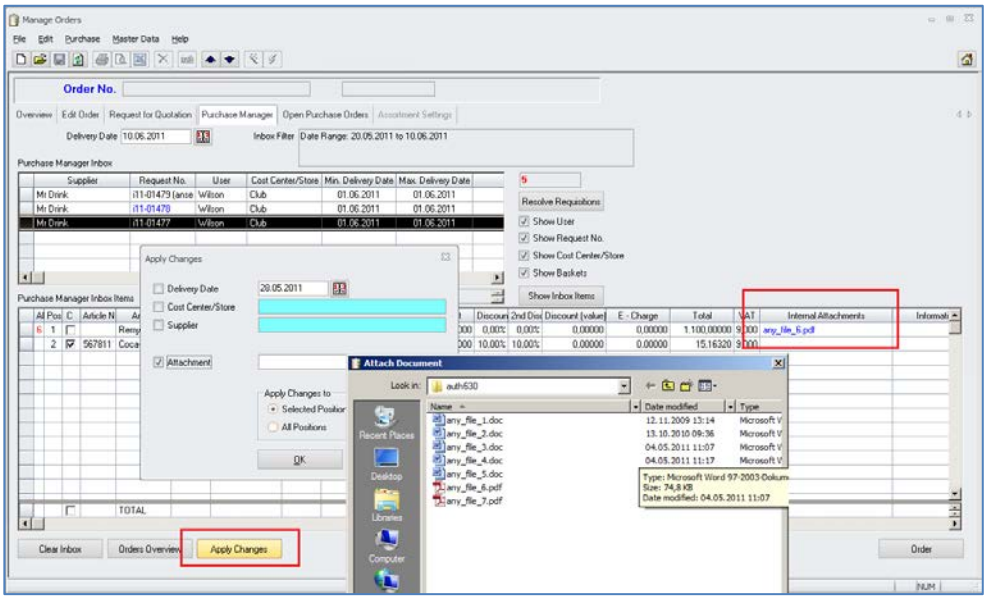
In the module “Resolve Requisitions” the user can attach the documents per position via the function “Apply Changes”:



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

Purchase Manager:

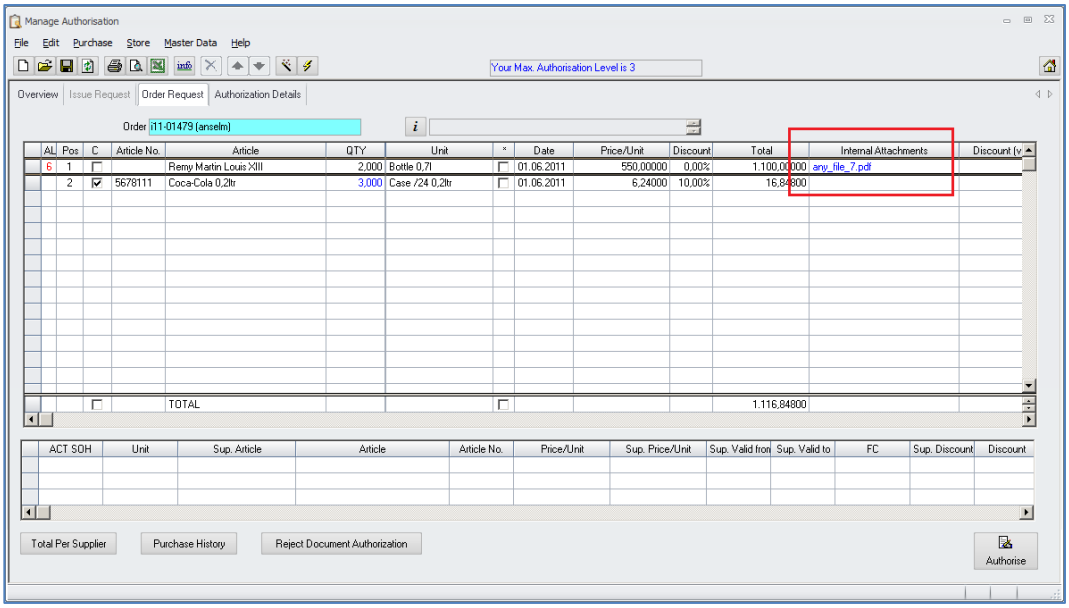
In the “Purchase Manager” screen the user can attach the documents per position via the function “Apply Changes”:



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.

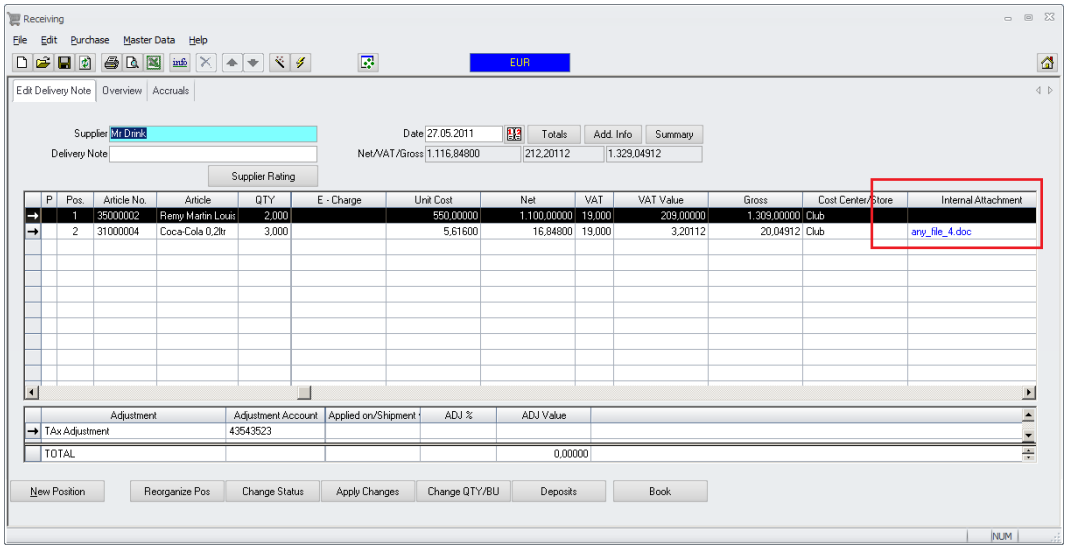
Authorization:

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



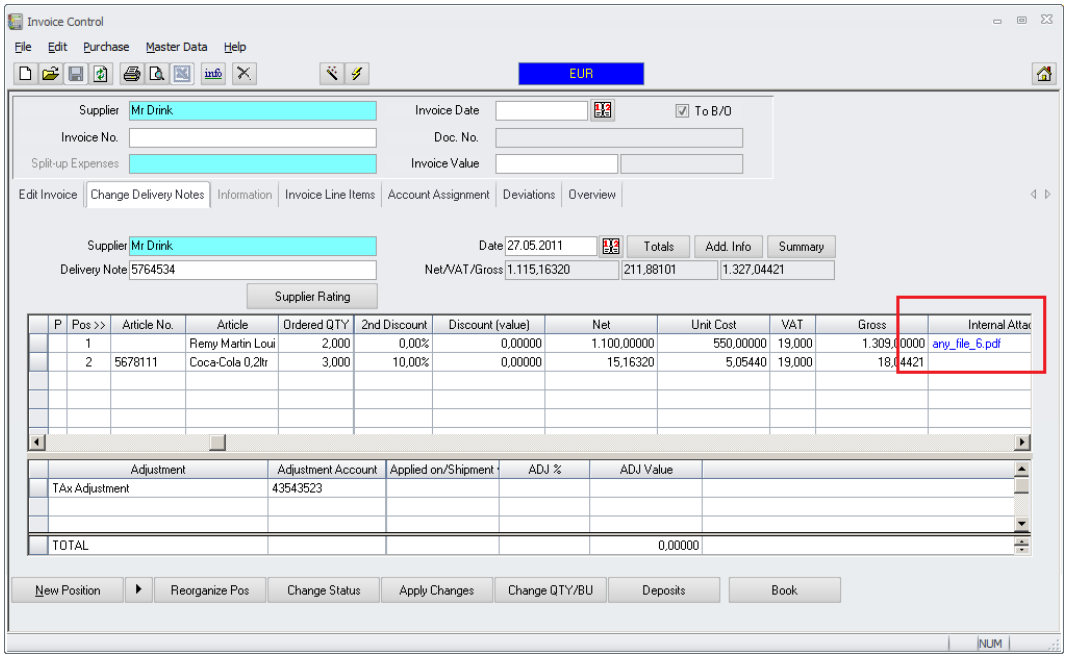
Receiving:

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



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:

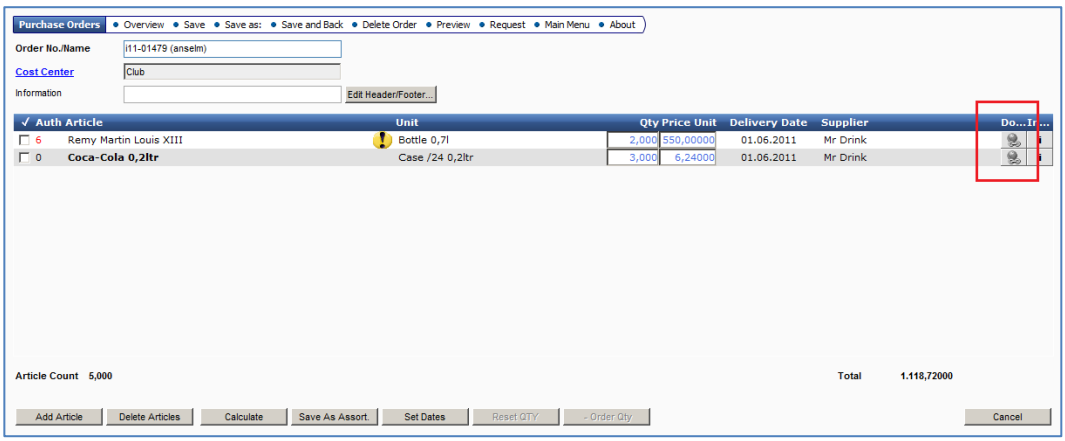


MCweb:

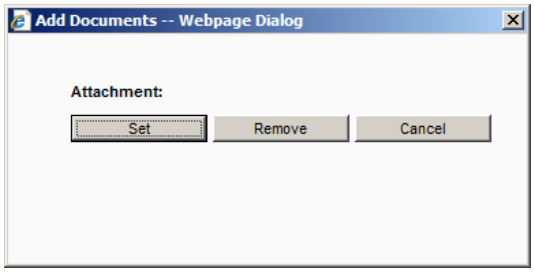
This part shows examples of the different screens where this feature can be used in MCweb:

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:

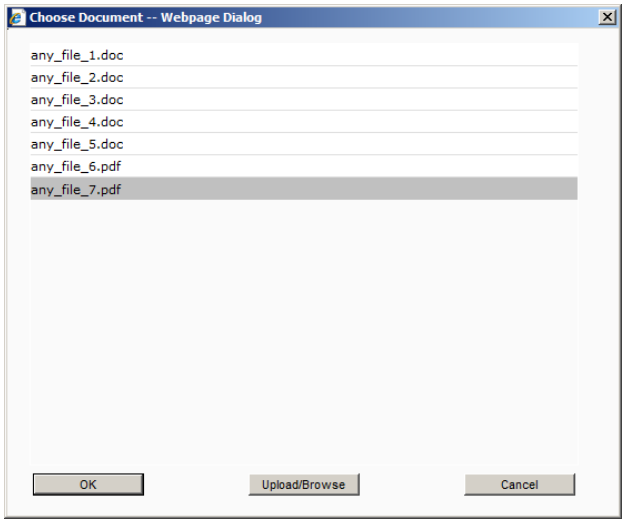


Click on this button to open the dialog window:



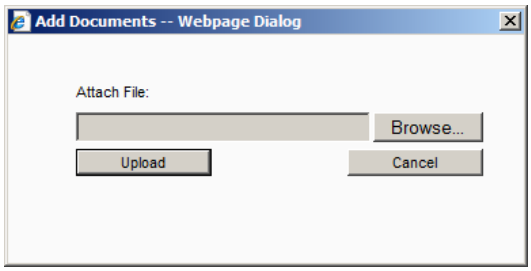
Click on “Set” to open the document selection window.
The function “Remove” can be used to remove already linked documents from this record.
“Cancel” should be used to close the window without saving the changes.

This screen now shows the content of the shared repository.

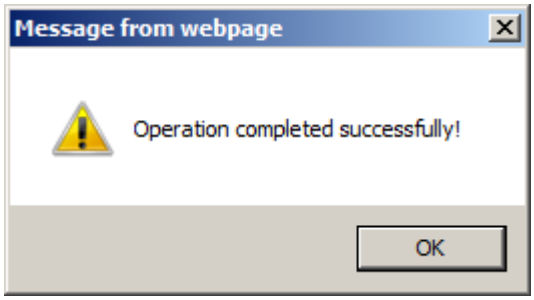


Mark a document and click on “OK” to select it.

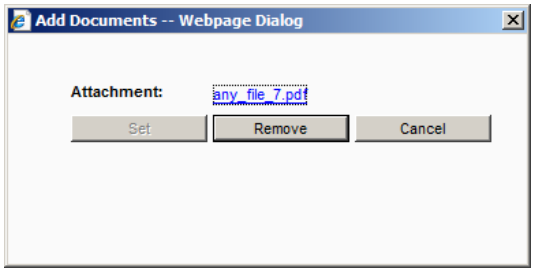
Since a MCweb user might not have direct access to the repository via the Explorer also the option to upload documents is available here. Click on “Upload/Browse” to select a document on the local environment and upload it to the repository.



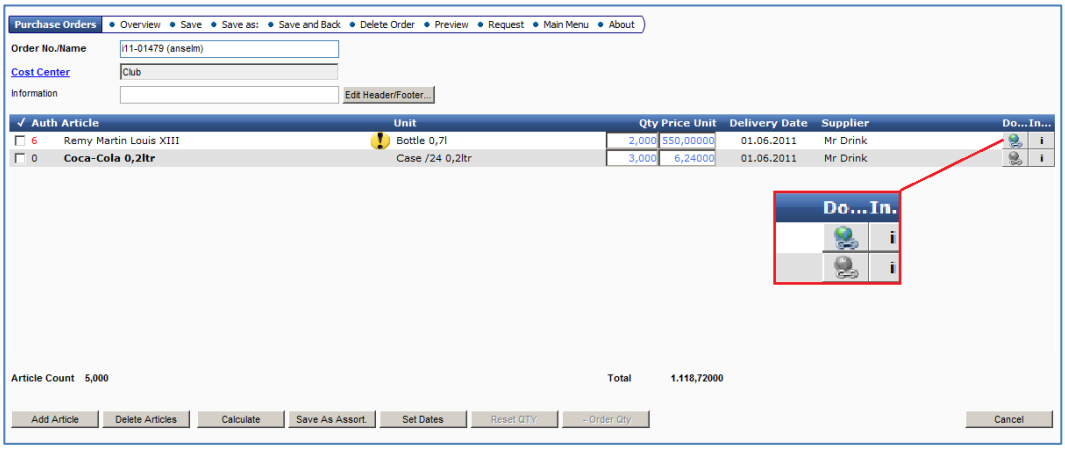
Once the upload was done the system will show the following confirmation message:



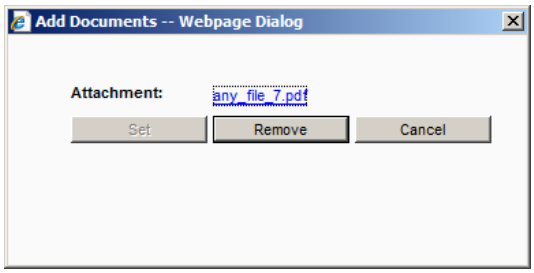
After this, or if there was already a document attached it will be displayed as below:



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



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

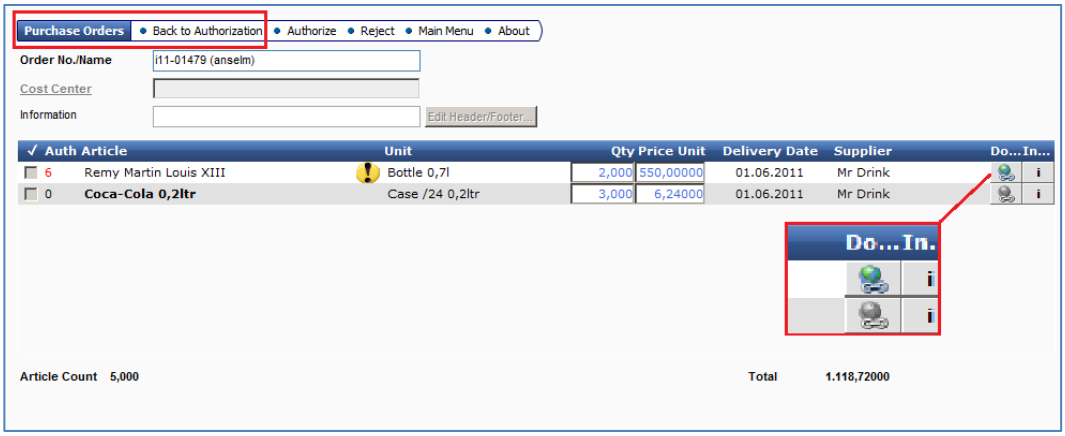


Requisitioning:

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

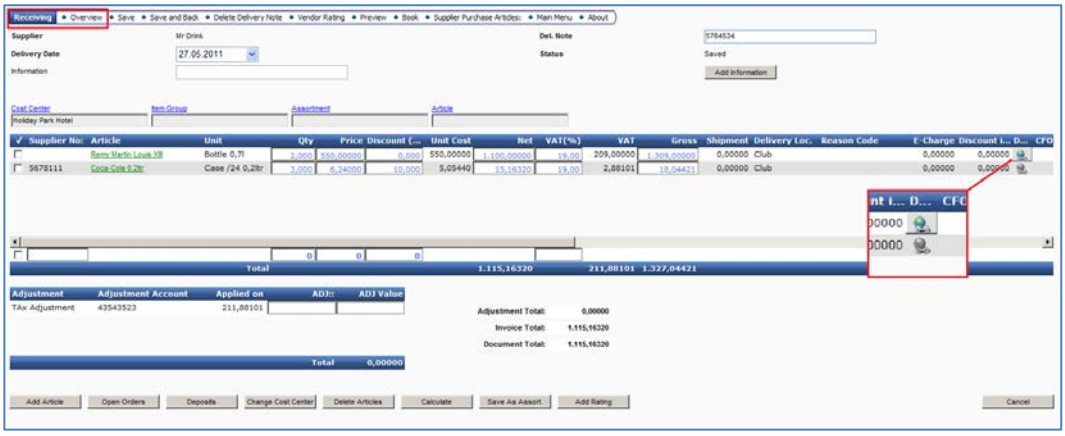
Authorization:

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.

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