

MICROS Materials Control

Purchase Orders – Internal Attachments

micros[®]
Materials Control

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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:

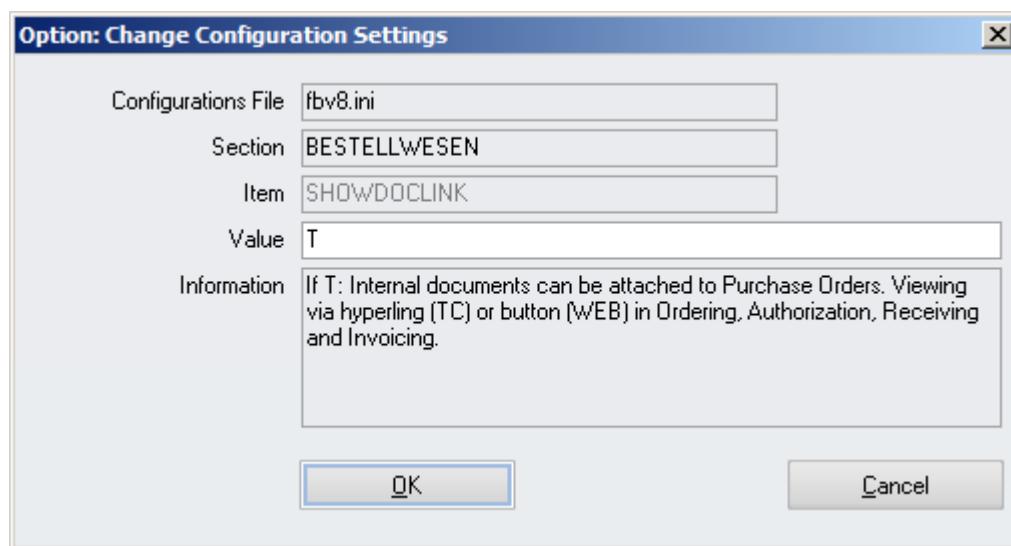
The following chapter will describe the required steps to use this functionality in both client applications.

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.

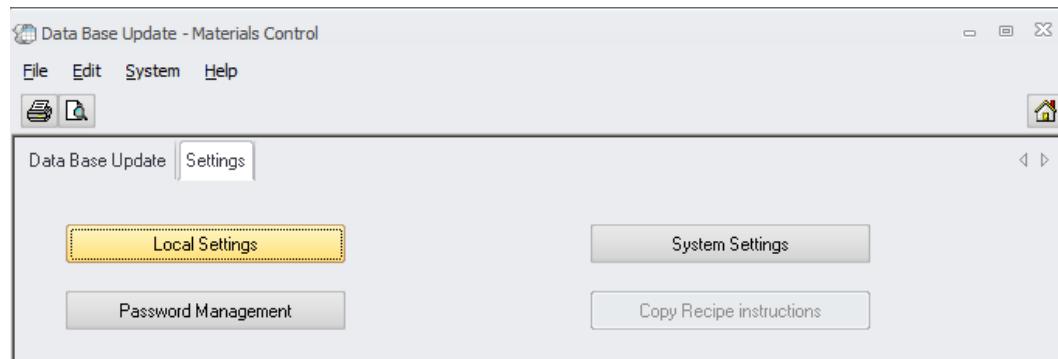
Document Storage:

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.

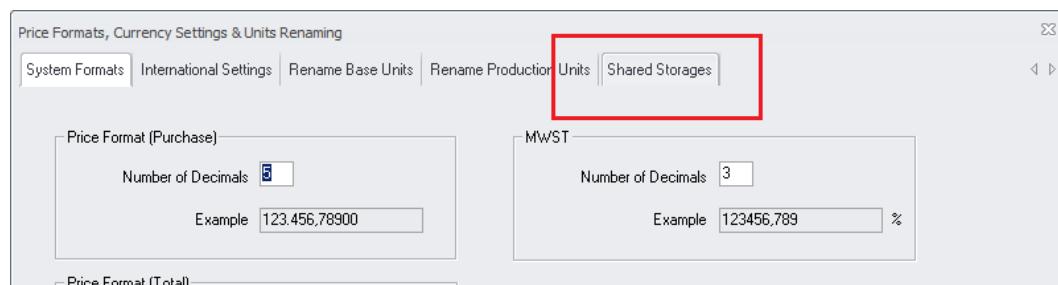
Thick Client only:

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

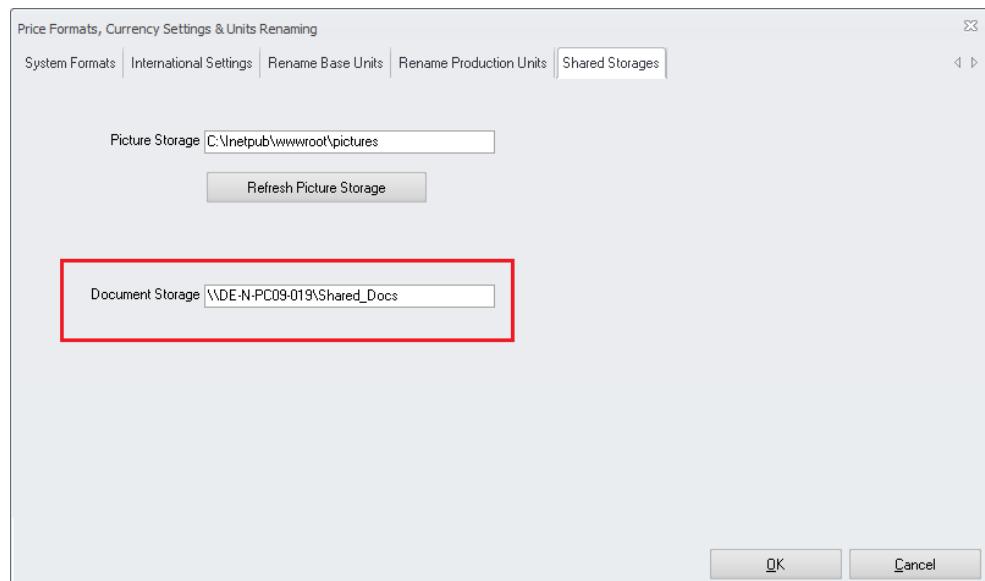
Go to System > Database Update > Settings > Local Settings:



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.



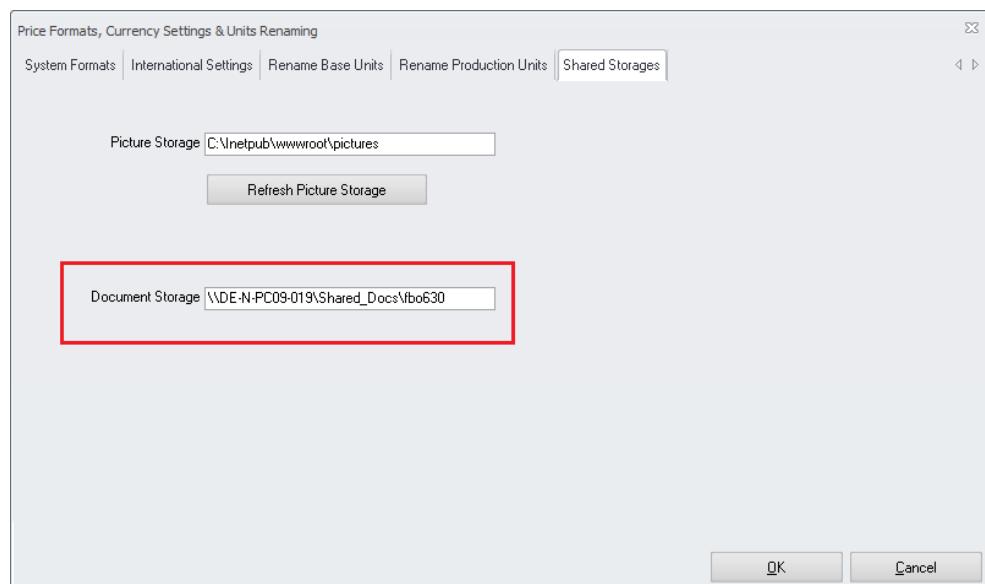
Here the path to the share must be defined.

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

Thick Client & MCweb:

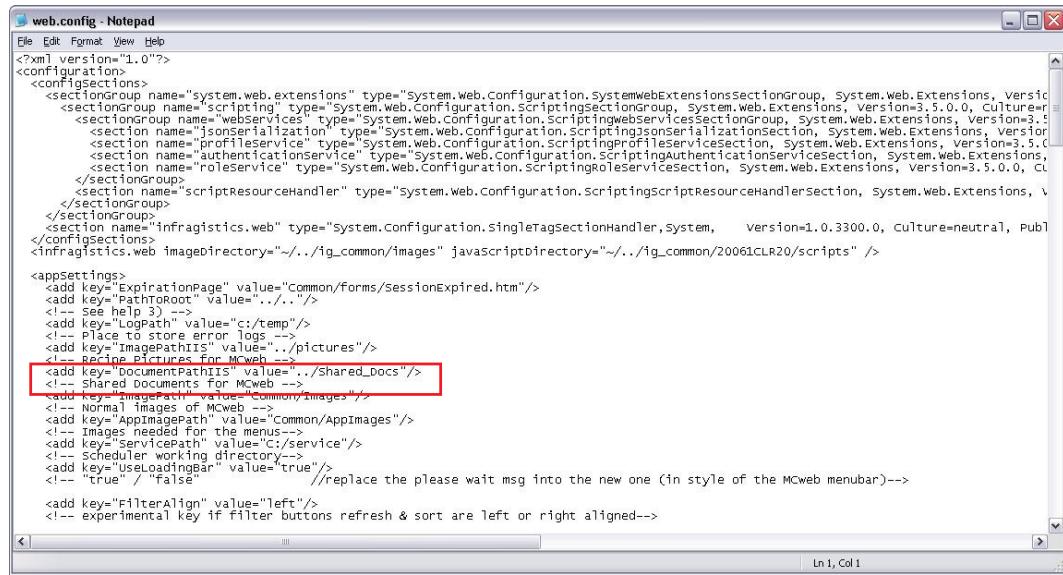
In case MCweb is place as well, the configuration is a bit different.

- 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.



Configuration MCWEB:

Open the web.config of the MCweb application.



```

<web.config - Notepad>
File Edit Format View Help
<?xml version="1.0"?>
<configuration>
  <configSections>
    <sectionGroup name="system.web.extensions" type="System.Web.Configuration.SystemWebExtensionsSectionGroup, System.Web.Extensions, Version=3.5.0.0, Culture=neutral, PublicKeyToken=31BF3856AD364E35" />
    <sectionGroup name="scripting" type="System.Web.Configuration.ScriptingSectionGroup, System.Web.Extensions, Version=3.5.0.0, Culture=neutral, PublicKeyToken=31BF3856AD364E35" />
    <section name="webServices" type="System.Web.Configuration.WebServicesSectionGroup, System.Web.Extensions, Version=3.5.0.0, Culture=neutral, PublicKeyToken=31BF3856AD364E35" />
    <section name="profileService" type="System.Web.Configuration.ScriptingProfileSection, System.Web.Extensions, Version=3.5.0.0, Culture=neutral, PublicKeyToken=31BF3856AD364E35" />
    <section name="roleAuthenticationService" type="System.Web.Configuration.ScriptingAuthenticationSection, System.Web.Extensions, Version=3.5.0.0, Culture=neutral, PublicKeyToken=31BF3856AD364E35" />
    <section name="roleService" type="System.Web.Configuration.ScriptingRoleServiceSection, System.Web.Extensions, Version=3.5.0.0, Culture=neutral, PublicKeyToken=31BF3856AD364E35" />
    <section name="scriptResourceHandler" type="System.Web.Configuration.ScriptingResourceHandlerSection, System.Web.Extensions, Version=3.5.0.0, Culture=neutral, PublicKeyToken=31BF3856AD364E35" />
  </configSections>
  <section name="infragistics.web" type="System.Configuration.SingleTagSectionHandler, System, Version=1.0.3300.0, Culture=neutral, PublicKeyToken=31BF3856AD364E35" />
  <infragistics.web imageDirectory="~/ig_common/images" javascriptDirectory="~/ig_common/20061CLR20/scripts" />
<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 -->
  <!-- Normal images of MCweb -->
  <add key="AppImagePath" 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-->
</appSettings>

```

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"/>

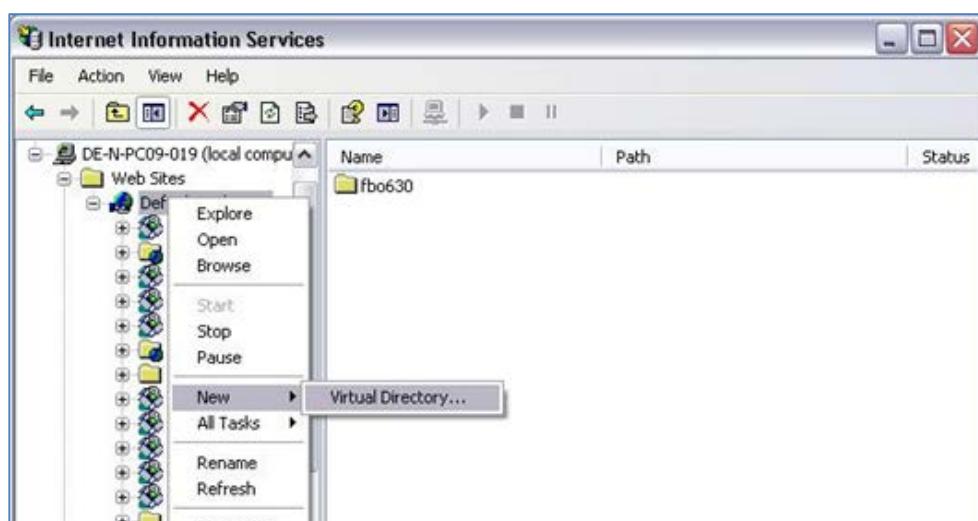
```

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.

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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.

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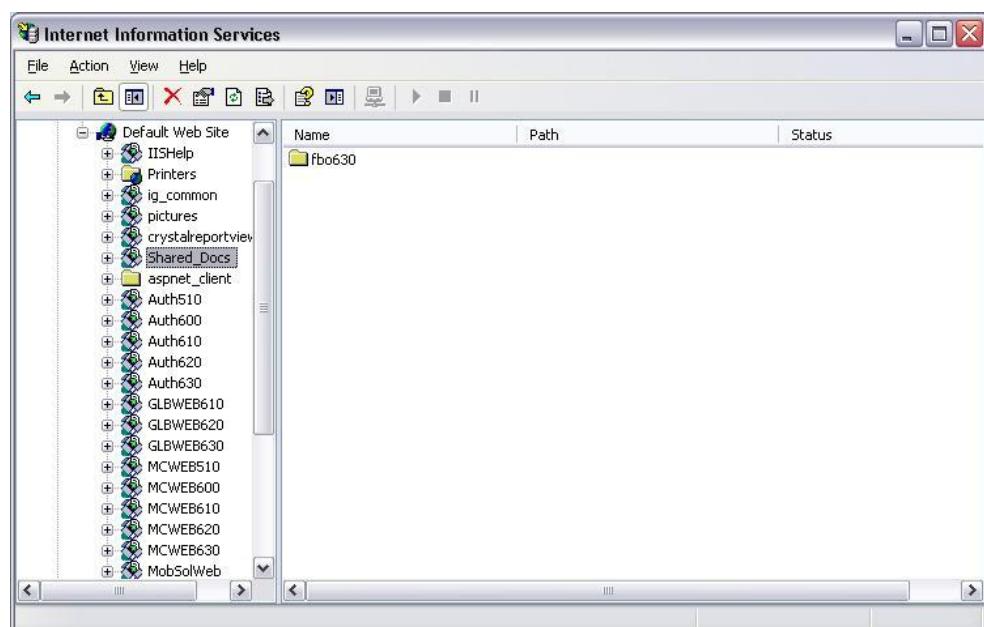
Click "Next" to continue.



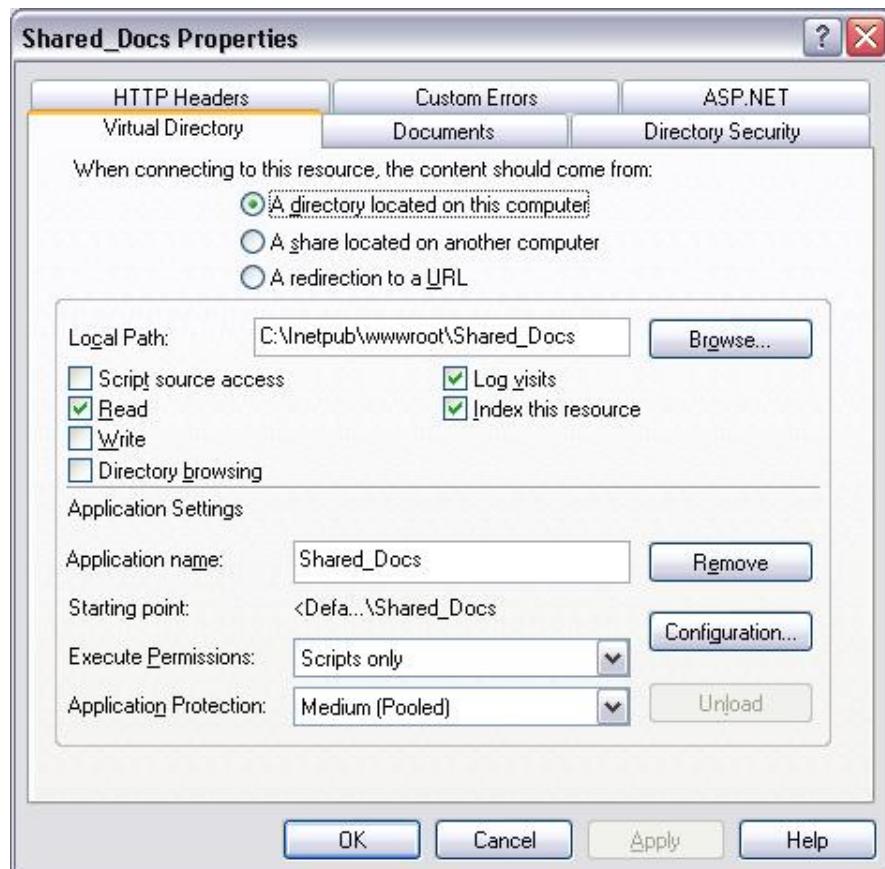
Check the Access Permissions and click "Next".



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.

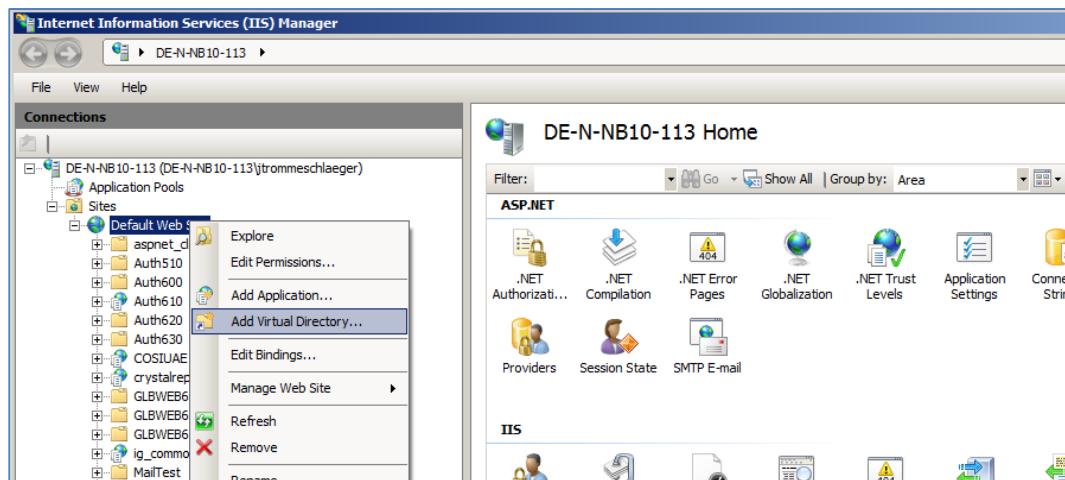


Click "OK" to close the screen.

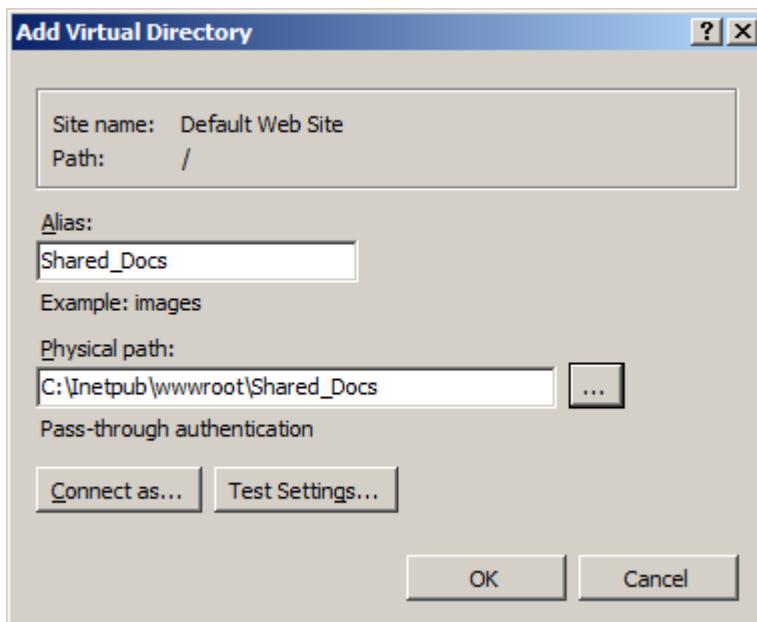
Close the IIS screen and restart it via IISRESET.

IIS 7.x

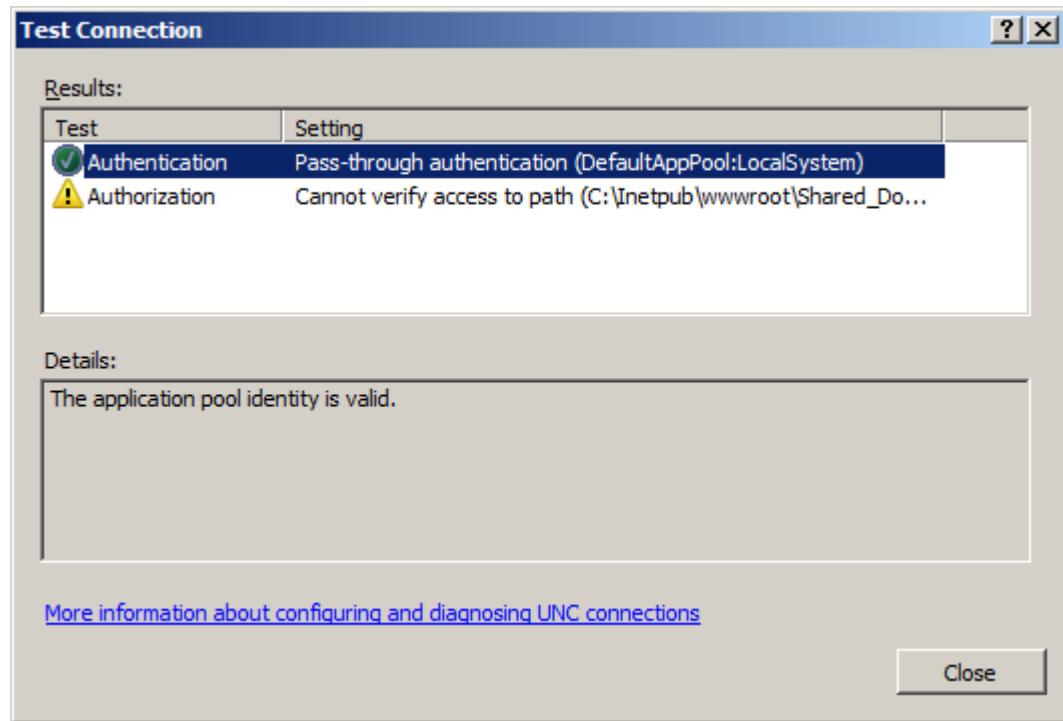
Open the IIS main screen. In the tree view on the left please mark the record “Default Web Site” and right-click to open the context menu.



Select “Add Virtual Directory”:

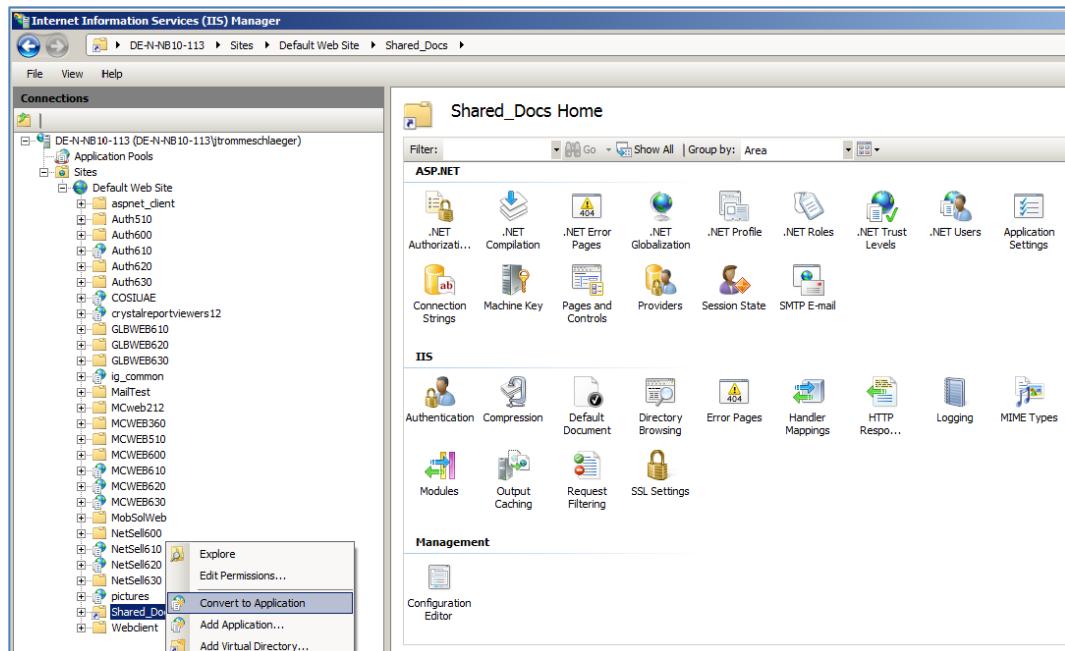


Define the alias. This must be named as the network share. Define the physical path and click on “Test Settings”:

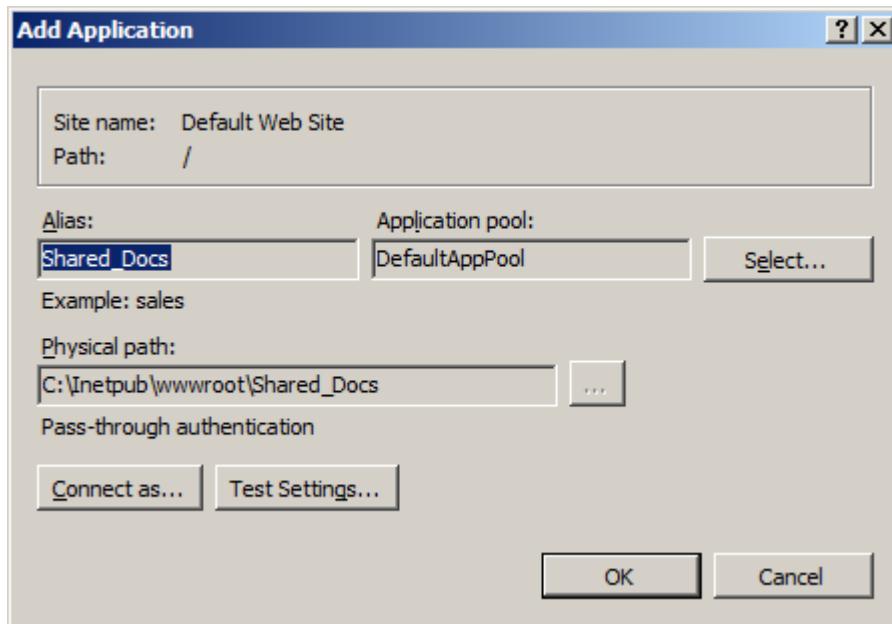


Make sure that the Authentication is marked as successful. The eventually warning sign for the Authorization can be ignored.

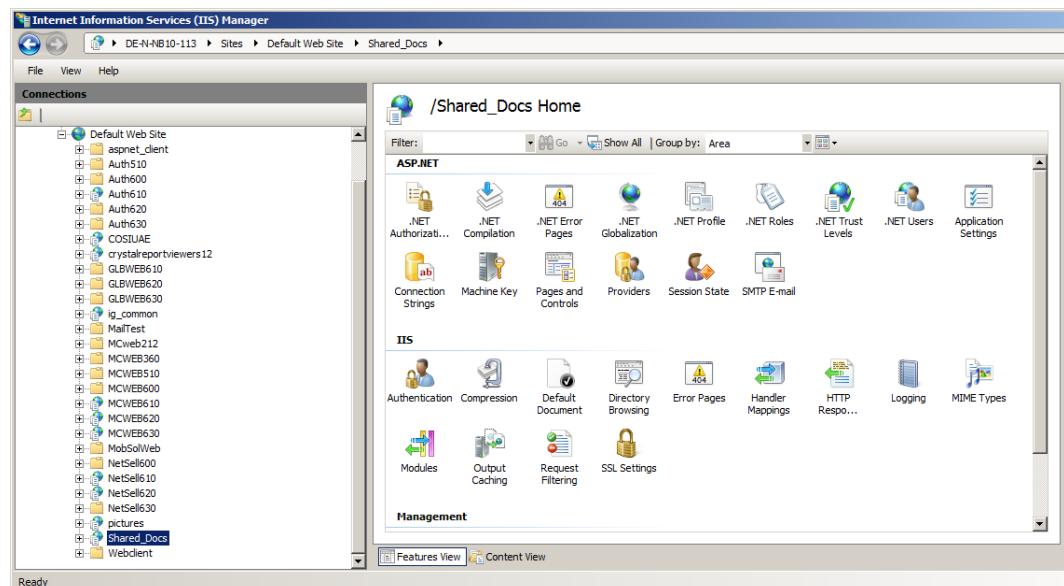
Close the screen. Now again right click the folder "Shared_Docs" in the tree view and select "Convert to Application":



Check the definitions:



Click OK to finalize the configuration.



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

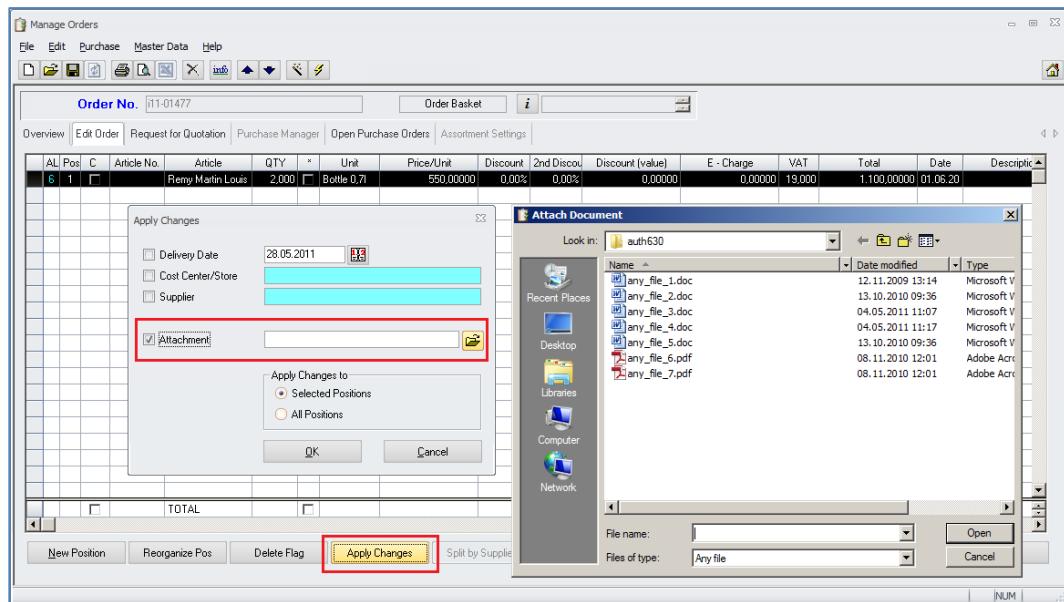
Close the IIS screen and restart it via IISRESET.

Functionality:

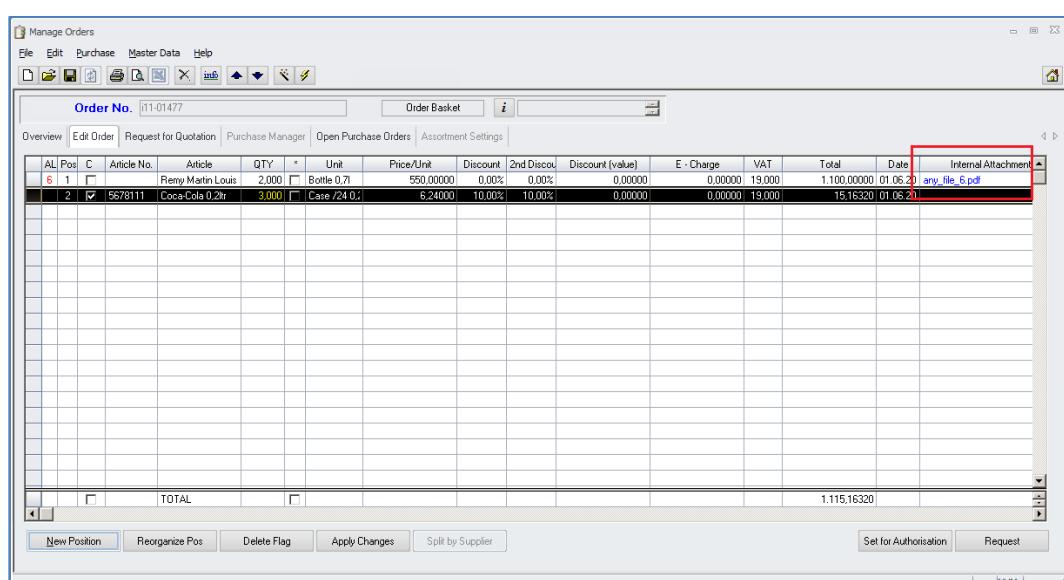
The following will show examples of the different screens where this feature can be used in the classic thick client:

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.



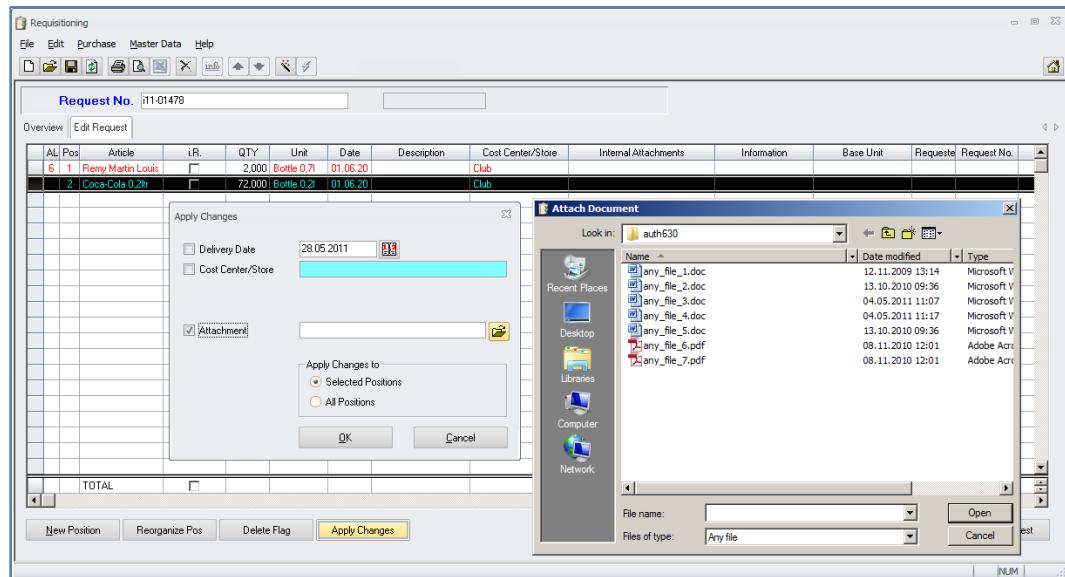
Linked documents will be shown in the column “Internal Attachments” in blue color.

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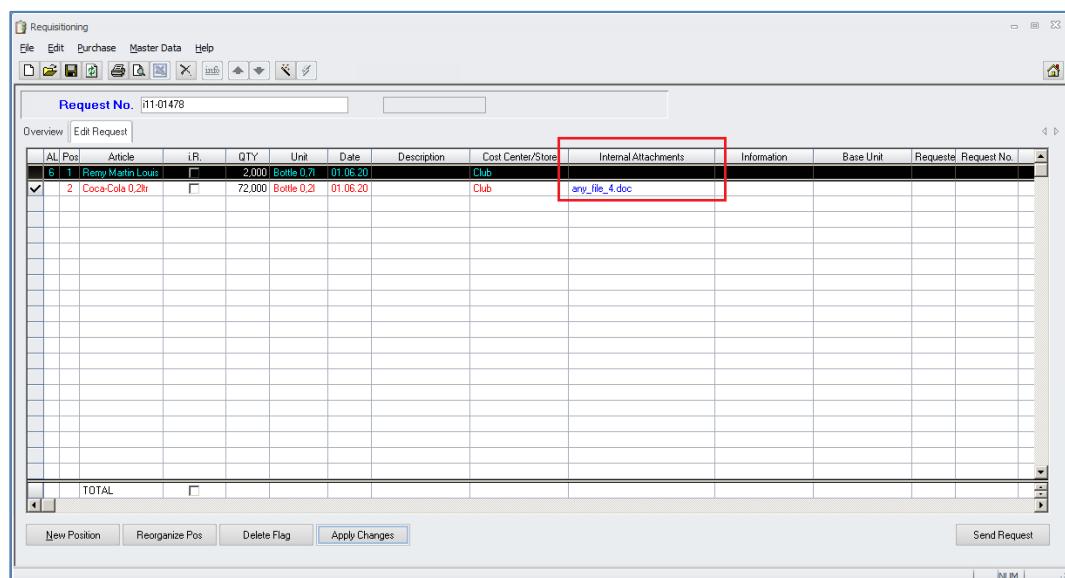
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Requisitioning:

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



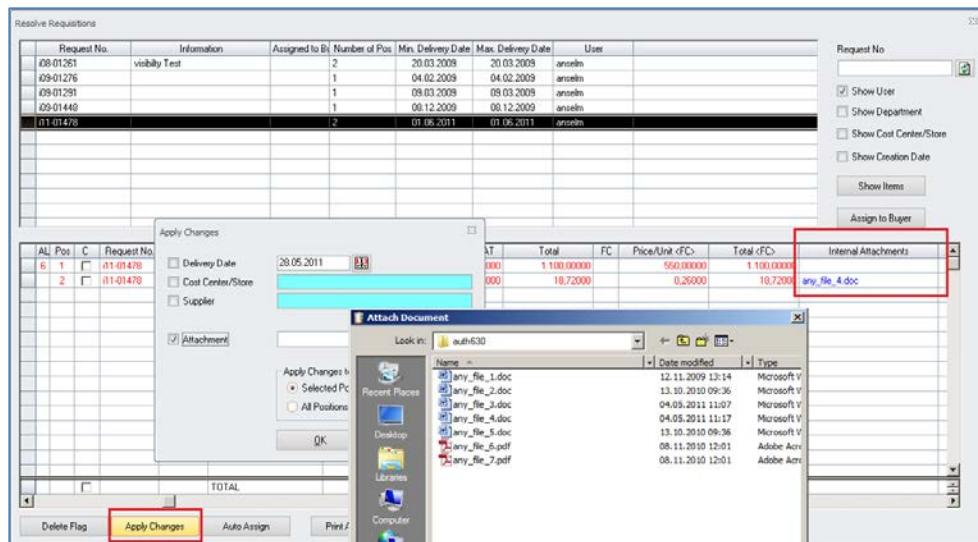
The system will open a dialog window showing the content of the shared storage. Select the document and click OK.



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

Resolve Requisitions:

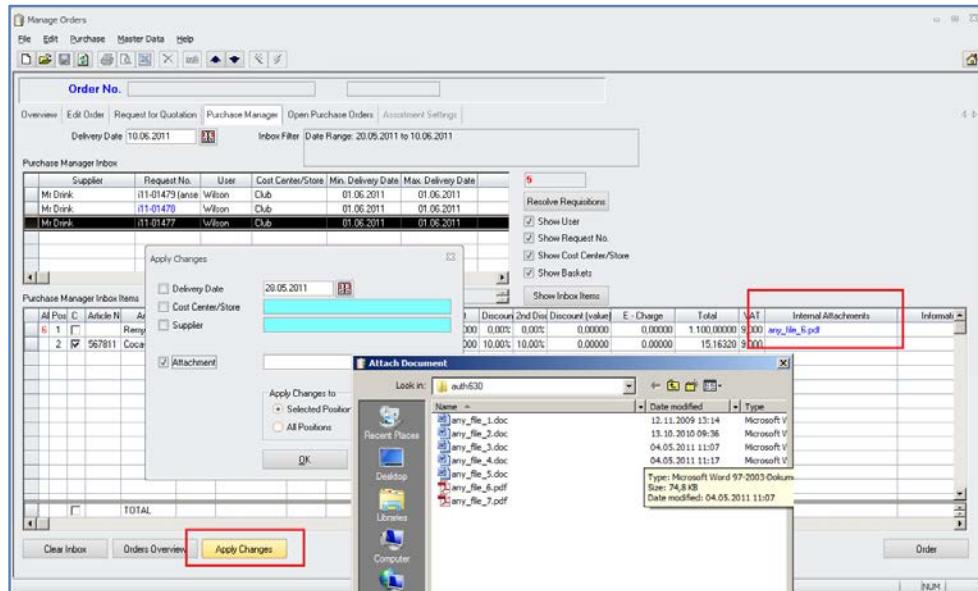
In the module “Resolve Requisitions” the user can attach the documents per position via the function “Apply Changes”:



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:

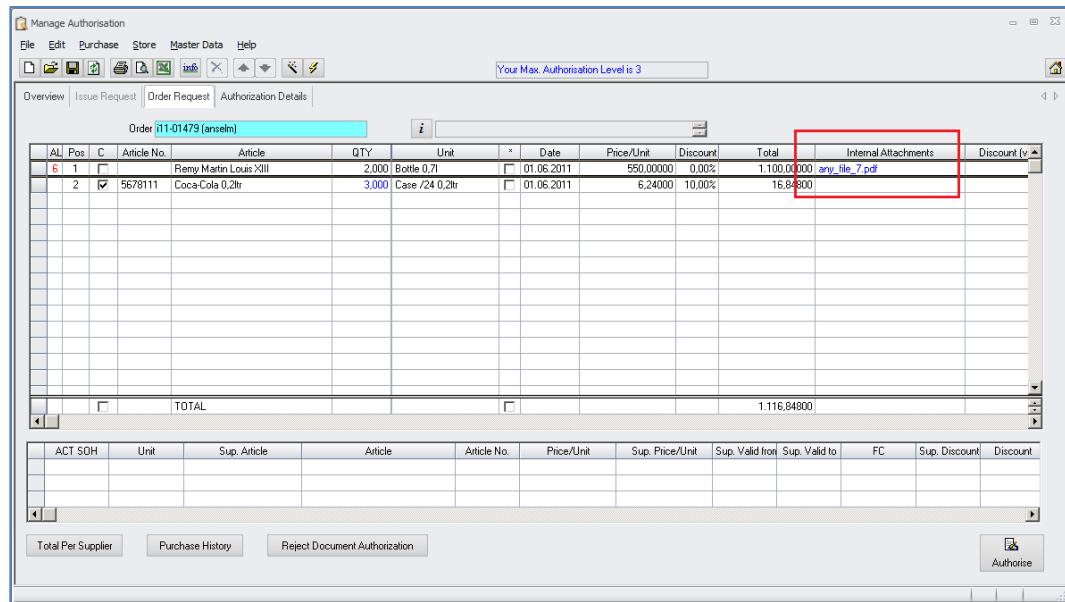
In the “Purchase Manager” screen the user can attach the documents per position via the function “Apply Changes”:



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:

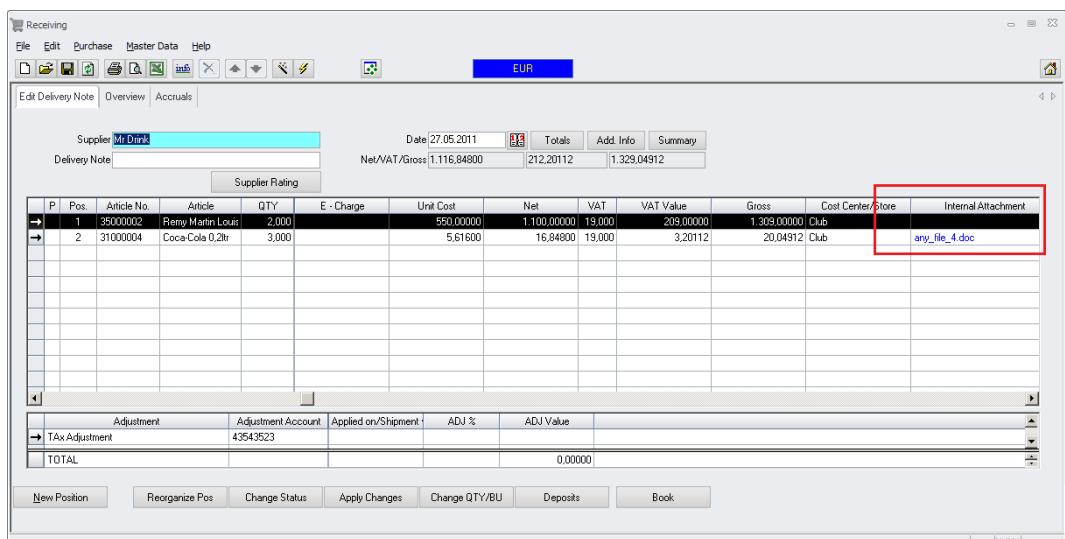
In the “Authorization” module the user can view the documents per position via click on the blue document name in the column “Internal Attachments”:



AL	Pos	C	Article No.	Article	QTY	Unit	x	Date	Price/Unit	Discount	Total	Internal Attachments	Discount
1	6			Remy Martin Louis XIII	2.000	Bottle 0,7l		01.06.2011	550,00000	0,00%	1.100,00000	any_file_7.pdf	
	2		5678111	Coca-Cola 0,2ltr	3.000	Case /24 0,2ltr		01.06.2011	6,24000	10,00%	16.84800		

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”:



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:

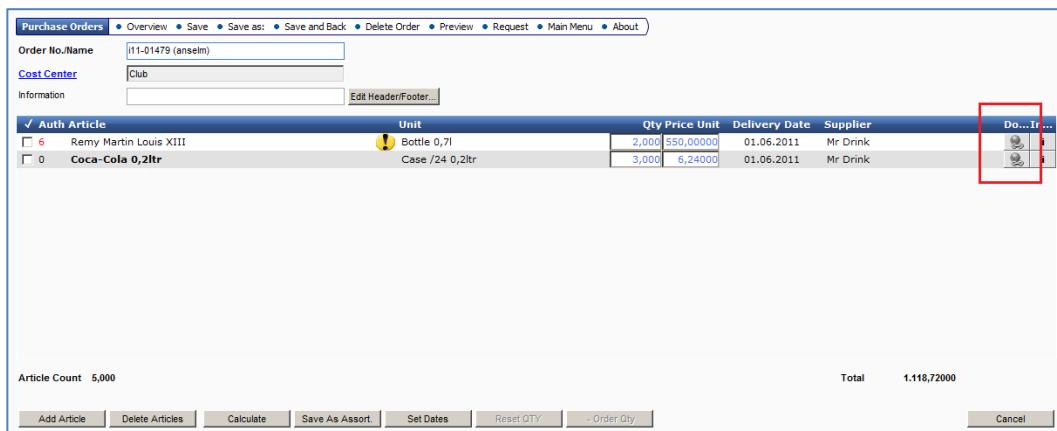
The screenshot shows the 'Invoice Control' software interface. The top menu bar includes 'File', 'Edit', 'Purchase', 'Master Data', and 'Help'. The toolbar contains icons for file operations like Open, Save, Print, and a magnifying glass. A currency selector 'EUR' is in the top right. The main area has input fields for 'Supplier' (Mr. Drink), 'Invoice Date' (27.05.2011), 'Doc. No.' (checkbox 'To B/O' is checked), 'Invoice No.' (empty), 'Split-up Expenses' (empty), 'Invoice Value' (empty), and 'Invoice Date' (empty). Below these are tabs for 'Edit Invoice', 'Change Delivery Notes', 'Information', 'Invoice Line Items', 'Account Assignment', 'Deviations', and 'Overview'. A sub-header shows 'Supplier Mr. Drink', 'Date 27.05.2011', and buttons for 'Totals', 'Add Info', and 'Summary'. Below this is a table for 'Delivery Note' (5764534) with columns for Net/VAT/Gross (1.115,16320), 211.88101, and 1.327.04421. A 'Supplier Rating' button is also present. The main table shows purchase details for two items: Remy Martin Loui (Pos 1) and Coca-Cola 0,2ltr (Pos 2). The last column, 'Internal Attn', contains 'any_file_6.pdf' for the first item and is highlighted with a red box. The bottom section shows an 'Adjustment' table with rows for 'TAX Adjustment' and a 'TOTAL' row with a value of 0,00000. The bottom navigation bar includes buttons for 'New Position', 'Reorganize Pos', 'Change Status', 'Apply Changes', 'Change QTY/BU', 'Deposits', 'Book', and 'NUM'.

MCweb:

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

Purchase Order:

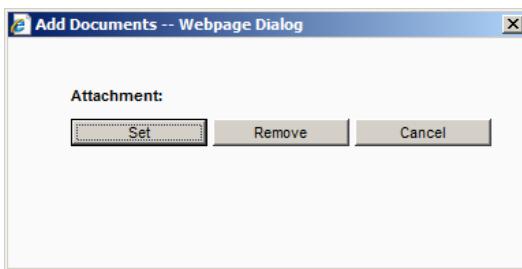
During the creation of Purchase Orders and Purchase Requests the user can attach the documents per position via the hyperlink button at the right end of the screen:



The screenshot shows a 'Purchase Orders' screen with the following details:

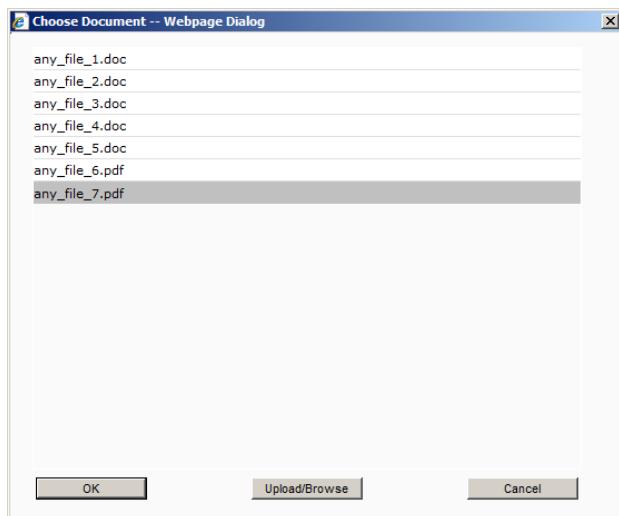
- Header:** Order No./Name: I11-01479 (anselm), Cost Center: Club, Information: Edit Header/Footer...
- Table:** A list of items with columns: Unit, Qty, Price, Unit, Delivery Date, Supplier, and a 'Do... Ir...' column with two hyperlinks (indicated by a red box).
- Bottom:** Article Count: 5,000, Total: 1.118,72000, and buttons: Add Article, Delete Articles, Calculate, Save As Assort., Set Dates, Reset QTY, Order Qty, and Cancel.

Click on this button to open the dialog window:



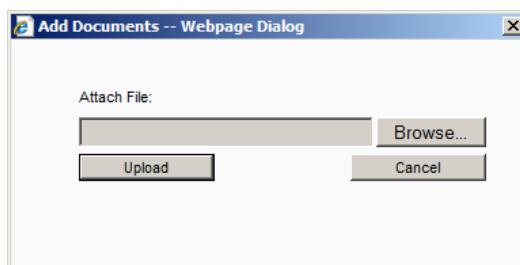
Click on "Set" to open the document selection window.
 The function "Remove" can be used to remove already linked documents from this record.
 "Cancel" should be used to close the window without saving the changes.

This screen now shows the content of the shared repository.

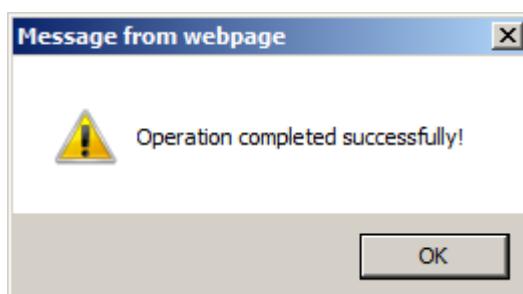


Mark a document and click on "OK" to select it.

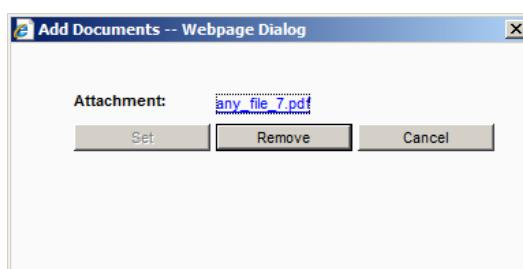
Since a MCweb user might not have direct access to the repository via the Explorer also the option to upload documents is available here. Click on "Upload/Browse" to select a document on the local environment and upload it to the repository.



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



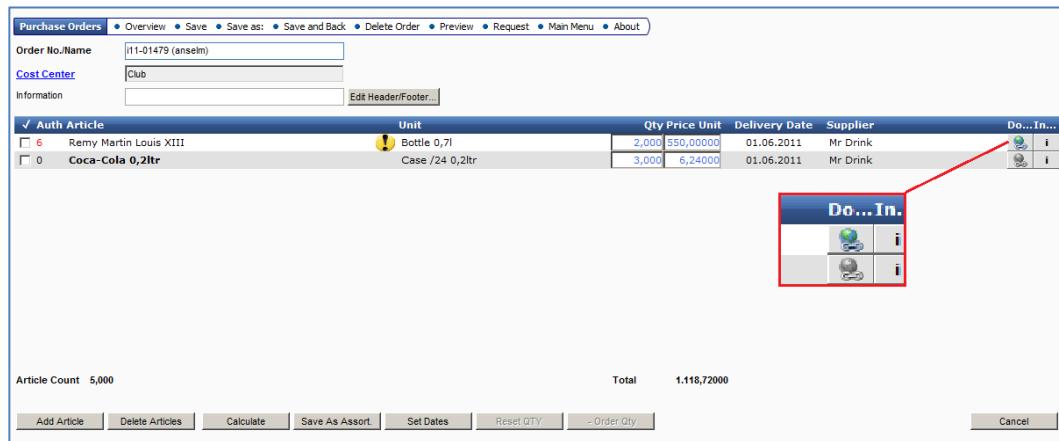
After this, or if there was already a document attached it will be displayed as below:



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



Purchase Orders

Order No./Name: I11-01479 (anselm)

Cost Center: Club

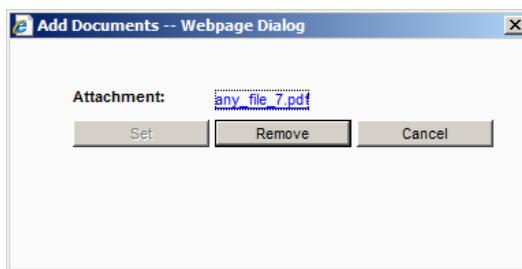
Information: [Edit Header/Footer...](#)

Auth Article	Unit	Qty	Price	Unit	Delivery Date	Supplier	Do...In...
<input type="checkbox"/> 6 Remy Martin Louis XIII	Bottle 0,7l	2,000	550,00000		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: 1.118,72000

[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:

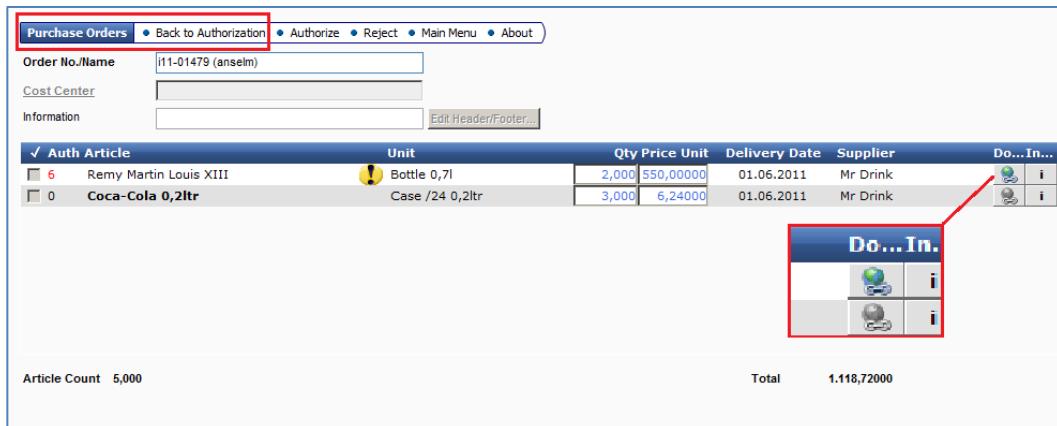


Requisitioning:

- 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.



Purchase Orders

Order No./Name: I11-01479 (anselm)

Cost Center:

Information: Edit Header/Footer...

Auth Article

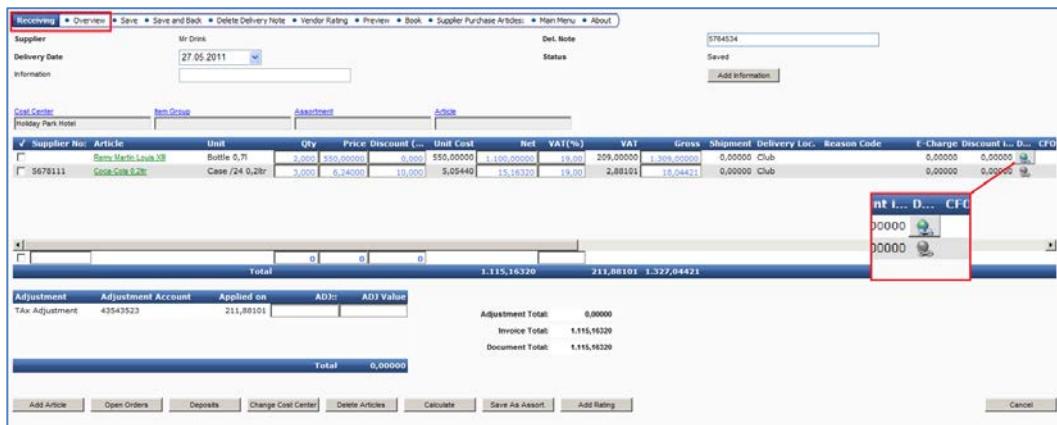
	Unit	Qty	Price	Unit	Delivery Date	Supplier	Do... In...
6	Bottle 0,7l	2,000	550,00000		01.06.2011	Mr Drink	
0	Case /24 0,2ltr	3,000	6,24000		01.06.2011	Mr Drink	

Article Count 5,000

Total 1.118,72000

Receiving:

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



Receiving

Supplier: Mr. Drink

Delivery Date: 27.05.2011

Information:

Cost Center: Holiday Park Hotel

Item Group: Assigned

Article

Supplier No.	Article	Unit	Qty	Price	Discount (%)	Unit Cost	Net	VAT (%)	VAT	Gross	Shipment	Delivery Doc.	Reason Code	E-Charge	Discount L...	D...	CFO
✓ Supplier No:	Remy Martin Louis XIII	Bottle 0,7l	2,000	330,00000	0,0000	550,00000	1.100,00000	19,00	209,00000	1.309,00000	0,00000	Club	0,00000	0,00000			
□ 5678111	Coca-Cola 0,2ltr	Case /24 0,2ltr	3,000	6,24000	10,0000	50,05440	15,18320	19,00	2,88101	18,04421	0,00000	Club	0,00000	0,00000			

Total 1.115,16320

211,88101 1.337,04421

Adjustment

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