

MICROS Materials Control

eForms for Articles



Product Version **8.7.30.39.1457**

Document Title:	e-Forms for Articles
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Date:	19.03.2013
Version No. of Document:	1.1

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Introduction

When ordering certain articles a number of details sometimes must be provided. A good example might be a business card. The manufacturer knows about the layouts, etc. but needs to have the details, like name, position, phone, email.

For such items usually always an additional document/email was necessary.

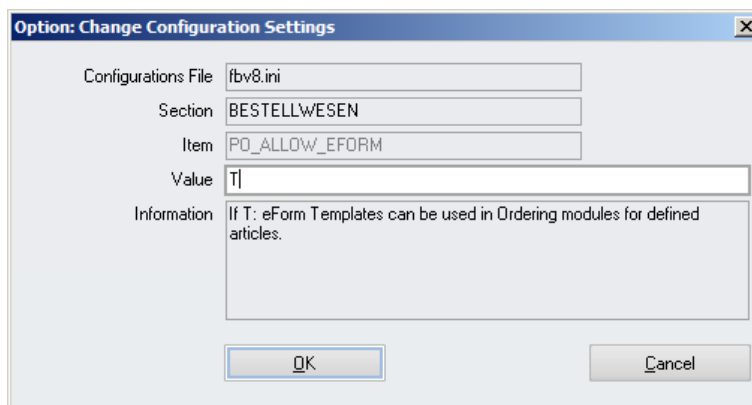
To avoid such Materials Control now offers eForms linked to stock articles. These e-Forms are (in short words) customizable additional fields to be filled at ordering.

This function affects the modules Purchase Orders, Order Requests and Requisitioning in the Materials Control Thick Client.

Configuration

Feature Activation

The functionality itself needs to be activated in the configuration through a parameter in the section [BESTELLWESEN]:



Option: Change Configuration Settings

Configurations File: fbv8.ini

Section: BESTELLWESEN

Item: PO_ALLOW_EFORM

Value: T

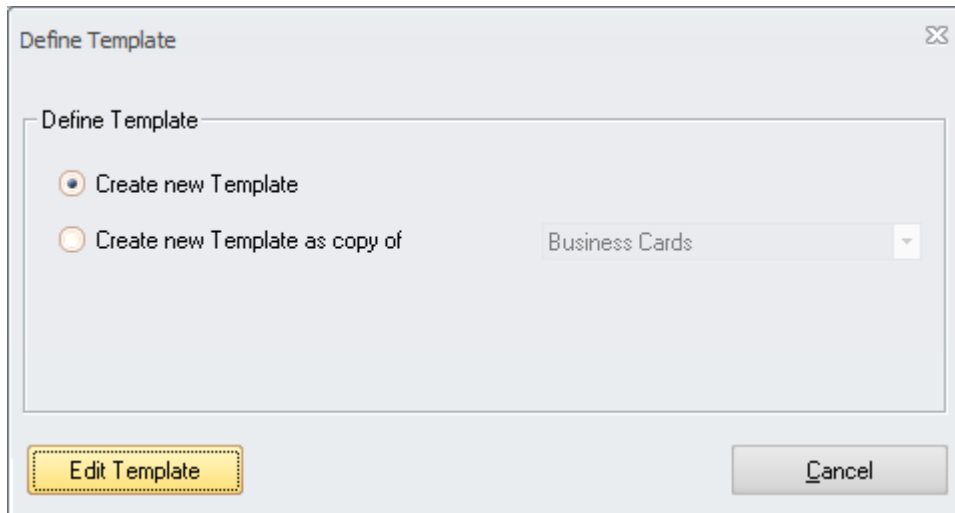
Information: If T: eForm Templates can be used in Ordering modules for defined articles.

OK Cancel

This parameter needs to be set to T to activate ...

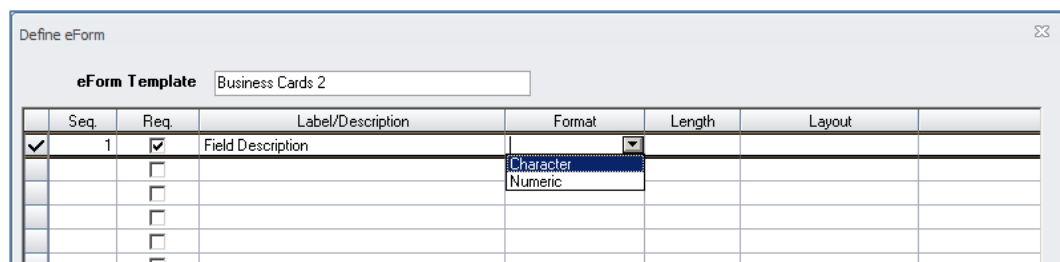
- ... the availability in the Article Setup
- ... the handling in the Order modules

Once the first eForm is created the system will show the following dialog when clicking on "Manage Templates" and the eForm Template selector shows "(none)".



The "Define Template" dialog box contains two radio buttons: "Create new Template" (selected) and "Create new Template as copy of". To the right of the second option is a dropdown menu currently showing "Business Cards". At the bottom are two buttons: "Edit Template" (highlighted with a yellow border) and "Cancel".

This screen allows either creating a blank new template or using an existing template as base for the new template.



The "Define eForm" dialog box shows a table for defining fields. The "eForm Template" dropdown is set to "Business Cards 2". The table has columns: Seq, Req, Label/Description, Format, Length, and Layout. The first row is pre-filled with Seq=1, Req=checked, Label/Description="Field Description", and a dropdown menu for Format is open showing "Character" and "Numeric".

Seq	Req	Label/Description	Format	Length	Layout
✓ 1	✓	Field Description	Character		
	<input type="checkbox"/>		Numeric		
	<input type="checkbox"/>				
	<input type="checkbox"/>				
	<input type="checkbox"/>				
	<input type="checkbox"/>				

The eForm allows up to 20 defined fields.

Field Options:

- Seq. Sequential Numbering for the fields (required).
- Req. Mark this check box to declare a field as required/mandatory. Mandatory fields will be shown **bold**, optional fields will be shown non-bold.

Seq	Req	Label/Description
1	<input checked="" type="checkbox"/>	First Name
2	<input checked="" type="checkbox"/>	Last Name
3	<input checked="" type="checkbox"/>	Title Line 1
4	<input type="checkbox"/>	Title Line 2
5	<input checked="" type="checkbox"/>	Company Name
6	<input checked="" type="checkbox"/>	Company Street
7	<input checked="" type="checkbox"/>	Company City Zip Code
8	<input checked="" type="checkbox"/>	Company City
9	<input checked="" type="checkbox"/>	Company Country
10	<input checked="" type="checkbox"/>	e Mail
11	<input checked="" type="checkbox"/>	Telephone
12	<input checked="" type="checkbox"/>	Direct
13	<input checked="" type="checkbox"/>	Fax
14	<input checked="" type="checkbox"/>	Mobile
15	<input type="checkbox"/>	

Delete Field

Edit eForm

First Name (30/XXXXXXXXXXXXXXXXXXXXXXXXXX)

Last Name (30/XXXXXXXXXXXXXXXXXXXXXXXXXX)

Title Line 1 (60/XXXXXXXXXXXXXXXXXXXXXXXXXX)

Title Line 2 (60/XXXXXXXXXXXXXXXXXXXXXXXXXX)

Company Name (30/AAAAA-AAAAA AaaA)

Company Street (30/XXXXXXXXXXXXXXXXXXXXXXXXXX)

Company City Zip Code (30/99999)

Company City (30/XXXXXXXXXXXXXXXXXXXXXXXXXX)

Company Country (50/AAAAAAAAAAAAAAAAAAAAA)

e Mail (50/aaaaaaaaaaaaaaa@aaaaaa.aaa)

- **Label/Description** Enter the name for the field.
- **Format** Select the format for the field.
Character: alphabetic characters and digits are allowed.
Numeric: digits only are allowed.
- **Length** Define the maximum length for the field.
- **Layout** Define the fixed layout for the field. This allows e.g. formatting phone numbers.
Allowed values:
 - X any character
 - ! any character, uppercase
 - a alphabetic characters
 - A alphabetic characters, uppercase
 - 9 digits 0-9
 - n alphanumeric characters
 - N alphanumeric characters, uppercase

Examples:

Define eForm

eForm Template Business Cards

Seq.	Req.	Label/Description	Format	Length	Layout
1	<input checked="" type="checkbox"/>	First Name	Character	30	!XXXXXXXXXXXXXXXXXXXXXXXXXXXX
2	<input checked="" type="checkbox"/>	Last Name	Character	30	!XXXXXXXXXXXXXXXXXXXXXXXXXXXX
3	<input checked="" type="checkbox"/>	Title Line 1	Character	60	!XXXXXXXXXXXXXXXXXXXXXXXXXXXX
4	<input type="checkbox"/>	Title Line 2	Character	60	!XXXXXXXXXXXXXXXXXXXXXXXXXXXX
5	<input checked="" type="checkbox"/>	Company Name	Character	30	AAAAAA-AAAAAA AaaA
6	<input checked="" type="checkbox"/>	Company Street	Character	30	!XXXXXXXXXXXXXXXXXXXXXXXXXXXX
7	<input checked="" type="checkbox"/>	Company City Zip Code	Character	30	99999
8	<input checked="" type="checkbox"/>	Company City	Character	30	!XXXXXXXXXXXXXXXXXXXXXXXXXXXX
9	<input checked="" type="checkbox"/>	Company Country	Character	50	AAAAAAAAAAAAAAAAAAAAAAAAAAAA
10	<input checked="" type="checkbox"/>	e Mail	Character	50	aaaaaaaaaaaaaaaa@aaaaaa.aaa
11	<input checked="" type="checkbox"/>	WWW	Character	50	www.aaaaaa-aaaaaa.net
12	<input checked="" type="checkbox"/>	Telephone	Character	30	+99 (0) 9999 999 -9
13	<input checked="" type="checkbox"/>	Direct	Character	30	+99 (0) 9999 999 -999
14	<input checked="" type="checkbox"/>	Fax	Character	30	+99 (0) 9999 999 -999
15	<input checked="" type="checkbox"/>	Mobile	Character	30	+99 (0) 999 99 99 999
	<input type="checkbox"/>				
	<input type="checkbox"/>				
	<input type="checkbox"/>				
	<input type="checkbox"/>				
	<input type="checkbox"/>				

Delete Field OK Cancel

Sequence 1: !XXXXXXXXXXXXXXXXXXXXXXXXXXXX

This field will be shown as first in the list and is mandatory. It will allow any alphabetic character and any digit. But the first character must be in uppercase! The maximum length will be 30.

Sequence 4:

!XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX

This field will be shown as fourth in the list and it is optional. It will allow any alphabetic character and any digit. But the first character must be in uppercase! The maximum length will be 60.

Sequence 5: AAAAAA-AAAAAA AaaA

This field contains data in three blocks. It will allow alphabetic characters only. If the user e.g. tries to enter a number, the system will simply not accept it.

Between the first and the second block the system will add a "-" (minus) automatically.

Between the second and the third block the system will add a " " (blank) automatically.

Any character entered in the first block will be converted to uppercase automatically.

Any character entered in the second block will be converted to uppercase automatically.

The first and the fourth character in the third block will be converted to uppercase automatically.

Enter "microsfideliogmbh" and the system will convert it to "MICROS-FIDELIO GmbH".

Sequence 7: 99999

This field was defined with a length of 30, but the field mask shows 99999. It will allow five numeric characters only. If the user e.g. tries to enter an alphabetic character, the system will simply not accept it.

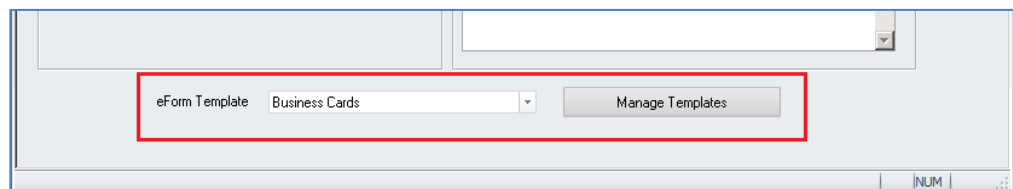
This will be a format for e.g. a German Zip Code.

Sequence 11: www.aaaaaa-aaaaaaa.net

This field consists of four blocks. The first block is set by the system when starting to edit this field. "www." will be defined as first four characters. Now one block with six characters, numbers or alphabetic, any case can be entered. After these six chars the system will add a "-" (minus) automatically. Now the user can enter again seven characters, numbers or alphabetic, any case. At the end the system will complete the entry with ".net".

This will be the perfect layout for "microsfidelio" to be converted to www.microsfidelio.net.

Click OK to save the template. Back in the Article screen please save again the article record.



Now the just created/edited eForm template is stored with the article. On click on "Manage Templates" the system will now show the linked eForm for editing.

Once the template is assigned, the handling in the order modules will be changed. This affects Purchase Orders, Order Requests and Requisitions.

Using eForms in Documents

Order Documents

The following chapter will describe the handling of articles with assigned eForms in the modules Purchase Orders, Order Requests and Requisitioning.

Since the behaviour is the same in all three modules, the usual Purchase Order will be used as example.

- Create a new order document and click on the button “New Position”:

- Here the button “Edit eForm” is visible, but inactive. It will become active only if a valid article was selected.

Select the sample from above “Business Cards...”

C	2nd Discount	Unit	Price/BU (+Discount)	QTY/BU	Price/BU	Base Unit	Article
		Each	25.00000	1.00000	25.00000	Each	Business Cards / Pa

	QTY	Price	Discount	2nd Discount	Discount (value)	E - Charges	Net	TAX	Gr
€	1,000	25.00000	0.00%	0.00%	0.00000	0.00000	25,00	0,000	

... and the button is active with red text.

- Click on this button to call the eForm dialog.

Edit eForm

First Name (30/!XXXXXXXXXXXXXXXXXXXXX)
Joerg

Last Name (30/!XXXXXXXXXXXXXXXXXXXXX)
Trommeschlaeger

Title Line 1 (60/!XXXXXXXXXXXXXXXXXXXXX)
Product Manager

Title Line 2 (60/!XXXXXXXXXXXXXXXXXXXXX)
Inventory Management Systems

Company Name (30/AAAAAA-AAAAAA AAA)
MICROS-FIDELIO GmbH

Company Street (30/!XXXXXXXXXXXXXXXXXXXXX)
Europa

Company City Zip Code (30/99999)

Company City (30/!XXXXXXXXXXXXXXXXXXXXX)

Company Country (50/AAAAAAAAAAAAAAAAAAAAA)

e Mail (50/aaaaaaaaaaaaaaaa@aaaaaa.aaa)

WWW (50/www.aaaaaa-aaaaaa.net)

Save

Edit eForm

First Name (30/!XXXXXXXXXXXXXXXXXXXXX)
Joerg

Last Name (30/!XXXXXXXXXXXXXXXXXXXXX)
Trommeschlaeger

Title Line 1 (60/!XXXXXXXXXXXXXXXXXXXXX)
Product Manager

Title Line 2 (60/!XXXXXXXXXXXXXXXXXXXXX)
Inventory Management Systems

Company Name (30/AAAAAA-AAAAAA AAA)
MICROS-FIDELIO GmbH

Company Street (30/!XXXXXXXXXXXXXXXXXXXXX)
Europadamn 2-6

Company City Zip Code (30/99999)
41460

Company City (30/!XXXXXXXXXXXXXXXXXXXXX)
Neuss

Company Country (50/AAAAAAAAAAAAAAAAAAAAA)
GERMANY

e Mail (50/aaaaaaaaaaaaaaaa@aaaaaa.aaa)
trommeschlaeger@micros.com

WWW (50/www.aaaaaa-aaaaaa.net)

Save Cancel

- The user now has could enter the required details. Once all fields are filled, click "Save" to close this dialog and return to the article order detail screen.
- At processing the document, the system checks if all mandatory eForm fields are filled. In case of missing details the following message is shown:

Materials Control - 8.7.20.39.1422

Some mandatory eForm fields are not filled. Please complete eForm data to continue

OK

- On the print outs (Purchase Order, Preview Reports, etc. ...) now also the eForm data could be shown.

Preview - D:\Program Files\MC 720\grp_eng\C_QUITT2.QRP

File View Print

Order: i12-01912

Customer No.: Order Date: 04.10.2012 13:14

Delivery Date: 05.10.2012
Delivery Loc.: 990 Micros-Fidelio Offices

Article	QTY	Unit	Price	Total
Business Cards / Pack250	1,00	Each	25,00	25,00

Weight/Unit: 1,000 Weight/Total: 1,000

e-Form Details:

First Name: Joerg
Last Name: Trommeschlaeger
Title Line 1: Product Manager
Title Line 2: Inventory Management Systems
Company Name: MICROS-FIDELIO GmbH
Company Street: Europadamm 2-6
Company City Zip Code: 41460
Company City: Neuss
Company Country: GERMANY
e Mail: jtrommeschlaeger@micros.com
WWW: www.micros-fidelio.net
Telephone: +49 (0) 2131 137-0
Direct: +49 (0) 2131 137-666
Fax: +49 (0) 2131 137-702
Mobile: +49 (0) 170 33 20 810

Total for Micros-Fidelio Offices: 25,00
Total for 05.10.2012: 25,00

Preview - D:\Program Files\MC 720\grp_eng\C_BESTLOGO.QRP

File View Print

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Materials Control

MICROS-Fidelio Software Deutschland GmbH
MICROS-Fidelio Software Deutschland GmbH
Europadamm 2-6
41460 Neuss
GERMANY
Fax: 02131 / 137 777

12345

Email: jtrommeschlaeger@micros.com Phone: 02131 / 137 0

Purchase Order No : Ord-2012-10-04-0061 Order Date: Thursday, 04.10.2012
Time: 13:15

Ordered by: admin System Administrator
Printed by: System Administrator Email: jtrommeschlaeger@micros.com Phone: +49 2131 1370 System Administrator
Fax: +49 2131 137702

Order Reference No.:
Delivery Date: Friday, 05.10.2012

Store: 990 Micros-Fidelio Offices

Micros-Fidelio Offices
Mushofstr 52
12345 Muc

Location Name: Location City: Location Country: Location Contact: Location Phone: Location Fax: Location Email:

PO Open (not received)

Pos	Article	Qty	Unit	Price	Total
1	Business Cards / Pack250	1,00	Each	25,000	25,00

Request Name: i12-01912 Weight/Unit: 1,000 Weight/Total: 1,000

e-Form Details:

First Name: Joerg
Last Name: Trommeschlaeger
Title Line 1: Product Manager
Title Line 2: Inventory Management Systems
Company Name: MICROS-FIDELIO GmbH
Company Street: Europadamm 2-6
Company City Zip Code: 41460
Company City: Neuss
Company Country: GERMANY
e Mail: jtrommeschlaeger@micros.com
WWW: www.micros-fidelio.net
Telephone: +49 (0) 2131 137-0
Direct: +49 (0) 2131 137-666
Fax: +49 (0) 2131 137-702
Mobile: +49 (0) 170 33 20 810

Purchase Order No : Ord-2012-10-04-0061
N.B. To be authorised by General Manager or Financial Contr

Page1 of 2

In order to do this the default template used on site should be adjusted.

- 1) Create a copy of the standard order template, named as C_{template_name}.QRP
The system will use this one instead in the future. The standard template will be overwritten with each further update.
- 2) Open the report template (C_*) with your Unify/Gupta Report Builder 6.0

- 3) Add (if not already existing) the new input item Efd_data shown as below to the item tree on the left and then add this new field to the detail block of the report layout.

Receiving Documents

Also in the Receiving module the eForm details are visible if entered in Ordering before.

- Select the delivery note and move it to the detail grid.
- Save the document and then press the preview button:

- Select the delivery note report template and click OK:

On the print out now also eForm data could be shown.

In order to do this the default template used on site should be adjusted.

- 4) Create a copy of the standard template LIEFSCH.QRP, named as C_LIEFSCH.QRP
The system will use this one instead in the future. The standard template LIEFSCH.QRP will be overwritten with each further update.
- 5) Open the report template (C_*) with your Unify/Gupta Report Builder 6.0

- 6) Add (if not already existing) the new input item Efd_data shown as below to the item tree on the left and then add this new field to the detail block of the report layout.

MCweb

The above described functionality is also available in MCweb in version 8.7.30.xx and higher.

eForms attached to specific articles now also could be filled in the MCweb Ordering module.

The screenshot shows the 'Purchase Orders' window in MCweb. The 'eForms' column in the article grid is highlighted with a red box, indicating the 'Edit' button for the selected article.

Auth	Article No.	Supplier	Article	Unit	Qty	Price Unit	Weight	On Hand	On Order	Delivery Date	Supplier	Cost Center	D...	In	eForms	Total Net Sum
0	60900014		Business Cards / Pack 250	Each	1,000	25,00	1,000	0,000	0,000	20.03.2013	MICROS-Fidello So...	MICROS-Fidello Of...	Edit	25,00

When adding articles with assigned eForms to the order, a new button is shown at the right end of the grid. Click this button to fill the eForm template:

The 'Edit eForm -- Webpage Dialog' window contains the following fields:

- First Name (30/XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX): Joerg
- Last Name (30/XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX): Trommeschlaeger
- Title Line 1 (30/XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX): Product Manager
- Title Line 2 (30/XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX): Inventory Systems
- Company Name (19/AAAAAA-AAAAAA !aa!): MICROS-Fidello GmbH
- Company Street (30/XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX): Europadamm 2-6
- Company City Zip Code (5/99999): 41430
- Company City (30/XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX): Neuss
- Company Country: (empty)

The 'Message from webpage' dialog box displays the following message:

Some mandatory eForm fields are not filled or are not valid.

- Company Name
- Company Country
- WWW
- Telephone

Similar to the thick client the system also will check the entered data against the template definitions.

The entered details are shown on the PO template as well.

http://172.28.100.218/mcweb730/Common/Forms/popupPrintOut.aspx?B0=DelegateSys.ApplicationClasse - Windo...

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Supplier
MICROS-Fidelio Software Deutschland GmbH
Europadamm 2-6
41460 Neuss
GERMANY

Delivery Address
Micros-Fidelio Offices
Maxhofstr.52
12345 Muc

Customer Number
Order Date 19.03.2013
Order placed at 19.03.2013 14:21
Orderer SystemAdministrator

PO No.
Supplier
Fax
Telephone Information

Ord-2013-03-19-0002
MICROS-Fidelio Software Deutschla
02131 / 137 777
02131 / 137 0

Delivery Date 20.03.2013

Article No.	Supplier No.	Article	Qty	Unit	Price	Total
60900014		Business Cards / Pack250	1,00	Each	25,00	25,00
e-Form Details: First Name: Joerg Last Name: Trommeschlaeger Title Line 1: Product Manager Title Line 2: Inventory Systems Company Name: MICROS-FIDELIO GmbH Company Street: Europadamm 2-6 Company City Zip Code: 41430 Company City: Neuss Company Country: GERMANY e Mail: jro WWW: www.micros-fidelio.net Telephone: +49 (0) 2131 137 -0 Direct: +49 (0) 2131 137 -888 Fax: +49 (0) 2131 137 -702 Mobile: +49 (0) 170 33 20 810						
Total						25,00

In the module Receiving the eForm details can be reviewed in the document preview:

http://172.28.100.218/mcweb730/Common/Forms/popupPrintOut.aspx?B0=DelegateSys.ApplicationClasse - Windo...

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Receiving

FB0730

SystemAdministrator
19.03.2013 14:24

Supplier : MICROS-Fidelio Software Deutschland
Delivery Date : 19.03.2013
Del. Note : RCV00010
Status : Saved

PO No.	Supplier No.	Article	Unit	Qty	Price	Discount (%)	Net	TAX(%)	TAX	Gross	Delivery Loc.
Ord-2013-03-19-0002		Business Cards / Pack250	Each	1,00	25,00	0,00	25,00	0,00	0,00	25,00	Micros-Fidelio Offices

e-Form Details:

First Name: Joerg
Last Name: Trommeschlaeger
Title Line 1: Product Manager
Title Line 2: Inventory Systems
Company Name: MICROS-FIDELIO GmbH
Company Street: Europadamm 2-6
Company City Zip Code: 41430
Company City: Neuss
Company Country: GERMANY
e-Mail: jtro
WWW: www.micros-fidelio.net
Telephone: +49 (0) 2131 137-0
Direct: +49 (0) 2131 137-666
Fax: +49 (0) 2131 137-702
Mobile: +49 (0) 170 33 20 810

Total: 25,00 0,00 25,00

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Germany
Phone: +49 2131-137 0 | Fax: +49 2131-137 777