



Restaurant Enterprise Series Enterprise Management Version 3.1 Installation and Setup Guide

About This Document

This document provides instructions for installing and configuring the MICROS Restaurant Enterprise Series (RES) Enterprise Management software. To help you navigate through the document, information is organized in sections and displayed in the following sequence:

General Information

- ◆ Who Should Be Reading This Document
- ◆ What the Reader Should Already Know
- ◆ How to Locate Information on Software Installation

Getting Started

- ◆ Directory Structure
- ◆ Hardware Requirements
- ◆ Software Requirements
- ◆ Before You Begin

Installing the Enterprise Management Software

- ◆ New Installations
- ◆ System Upgrades

Setting up the Corporate Database

- ◆ Defining Stores
- ◆ Organizing the Menu Item Data
- ◆ Creating a Pricing Structure
- ◆ Implementing Other EM Changes
- ◆ Creating Touchscreen Versions
- ◆ Assigning Touchscreen Versions to Stores
- ◆ Managing Jobs and Default Pay Rates
- ◆ Setting Up Subscriptions by Product
- ◆ Configuring Totals Collections

General Information

Who Should Be Reading This Document

This document is intended for the following audiences:

- ◆ MICROS Installers/Programmers
- ◆ MICROS Dealers
- ◆ MICROS Customer Service
- ◆ MICROS Training Personnel
- ◆ MICROS Customer Database Administrator
- ◆ Customer MIS Personnel
- ◆ Customer Database Administrator

What the Reader Should Already Know

This document assumes that you have the following knowledge or expertise:

- ◆ Operational understanding of PCs
- ◆ Understanding of basic network concepts
- ◆ Experience with Windows 95/NT 4.0
- ◆ Basic knowledge of relational database concepts
- ◆ Understanding of hospitality terminology and concepts
- ◆ Understanding of MICROS 3700 POS system and Restaurant Enterprise Series products

How to Locate Information on Software Installation

For information on installing RES software, including site requirements and installation tips, refer to *Restaurant Enterprise Series, Version 3.01 (RES 3000) Setup Instructions, P/N MD0003-052*. You can access this document directly from the CD by opening the ressetup_rmf.pdf file. You can also access this file through the Windows® *Start* menu by selecting *MICROS Applications / MICROS Documentation / ReadMe First / RES Setup*.

For information on installing a RES service pack, refer to *Restaurant Enterprise Series, Version 3.00 Installing a Service Pack, MD0003-042*. You can access this document by opening the \Micros\Documentation\RES\Common\Service Packs\SPInstall_RMF.pdf file.

Microsoft Windows NT® Service Pack

Microsoft Windows NT Service Pack 6a or greater must be installed prior to running RES Setup. The application of the Service Pack addresses known Year 2000 (Y2K) issues, making both the RES Server and PCWSs fully compliant for both Y2K and for euro currency. For more information, see *Restaurant Enterprise Series, Microsoft Windows NT® Service Pack Installation, P/N MD0009-056*.

MICROS Start Menu

You can find information about how to map your way to the MICROS Restaurant Enterprise Series (RES) applications, documentation, and help systems using the Windows® *Start* menu in the document listed below. You can access this document directly from the CD or through the *MICROS Applications / Documentation* option on the *Start* menu.

“Using the Windows Start Menu to Start the Restaurant Enterprise Series” – MICROS Part Number MD0003-023 - Filename md300startmenu.pdf.

Getting Started

Directory Structure

Application executables, sample layouts, and other files that are added during EM installation can be located in the following directories:

- ◆ **\Micros\Documentation\RES\EM**—EM documentation in pdf format
- ◆ **\Micros\RES\EM3\Bin**—Executables used by EM
- ◆ **\Micros\RES\EM3\Etc**—EM log file and the user-column translation text file
- ◆ **\Micros\RES\EM3\Transport**—Replication files sent to or received by the store
- ◆ **\Micros\RES\EM3\XML**—Files used by EM
- ◆ **\Micros\RES\EO\Reports**—EM Crystal Reports Templates
- ◆ **\Micros\RES\EM3\Utilities\SetStore.exe**—Tool used by EM after store setup to change store ID and remove EM from the system (store only)

Application executable that is launched from the EM CD:

\Tools\MIPriceCleaner.exe—Tool used by EM after store setup to delete obsolete prices from the EM central database (corporate only)

Hardware Requirements

In order to successfully install and enable an Enterprise Management system, the requirements described in this section must be met.

RES Server Requirements

The table below provides a list of RES Server requirements:

Managing:	Recommendations:	
1-25 Stores Polling Totals (400 Days)	Base:	Dual P111 (minimum)
	RAM:	528 MB
	HD Size:	(2) 9 GB
	HD Controller:	SCSI
	Processor Speed:	600 mhz (minimum)
	Operating System:	NT Workstation
26-100 Stores Configuration Management only	Base:	Dual P111 (minimum)
	RAM:	528 MB
	HD Size:	(2) 9 GB
	HD Controller:	SCSI
	Processor Speed:	600 mhz (minimum)
	Operating System:	NT Workstation
26-100 Stores Polling Totals (400 Days)	Base:	Dual P111 (minimum)
	RAM:	1 GB
	HD Size:	(3) 9 GB
	HD Controller:	SCSI
	Processor Speed:	600 mhz (minimum)
	Operating System:	NT Workstation

101-250 Stores Configuration Management Only	Base:	Dual P111 (minimum)
	RAM:	1 GB
	HD Size:	(2) 9 GB
	HD Controller:	SCSI
	Processor Speed:	600 mhz (minimum)
	Operating System:	NT Server
101-250 Stores Polling Totals (400 Days)	Base:	Dual P111 (minimum)
	RAM:	1 GB
	HD Size:	(3) 9 GB
	HD Controller:	SCSI 3 w/ RAID 5
	Processor Speed:	600 mhz (minimum)
	Operating System:	NT Server
251-500 Stores Configuration Management Only	Base:	Dual P111 (minimum)
	RAM:	1 GB
	HD Size:	(3) 9 GB
	HD Controller:	SCSI 3 w/ RAID 5
	Processor Speed:	600 mhz (minimum)
	Operating System:	NT Server
251-500 Stores Polling Totals (400 Days)	Base:	Dual P111 (minimum)
	RAM:	1 GB
	HD Size:	(3) 18 GB
	HD Controller:	SCSI 3 w/ RAID 5
	Processor Speed:	600 mhz (minimum)
	Operating System:	NT Server

501-1000 Stores Configuration Management Only	Base:	Dual P111 (minimum)
	RAM:	1 GB
	HD Size:	(3) 9 GB
	HD Controller:	SCSI 3 w/ RAID 5
	Processor Speed:	600 mhz (minimum)
	Operating System:	NT Server
501-1000 Polling Totals (400 Days)	Base:	Dual P111 (minimum)
	RAM:	1 GB
	HD Size:	(3) 18 GB
	HD Controller:	SCSI 3 w/ RAID 5
	Processor Speed:	600 mhz (minimum)
	Operating System:	NT Server

Note *If you are managing an enterprise with more than 1000 stores, contact the Enterprise Management Application Specialist within your distribution channel for hardware specifications.*

Software Requirements

To successfully install and enable the Enterprise Management application, MICROS requires/recommends installing the following software:

- ◆ Windows® NT® Service Pack 6a
- ◆ Microsoft® Internet Explorer 5.5
- ◆ EM Version 2.6 Service Packs 1 and 2 (required for all stores if upgrading from EM Version 2.6).
- ◆ RES Version 3.0 application software. The full Enterprise Office suite, including POS and back office applications must be installed on the corporate server, at a minimum.
- ◆ RES Version 3.0 Service Pack 4
- ◆ (Optional) Microsoft® Excel 97 and Microsoft® Query (required if using the sample spreadsheet to organize the menu item pricing information, as described on page 41)

Before You Begin

Before running Enterprise Management setup, the following should be noted:

- ◆ The individual installing the software must be logged on as “Administrator” before running EM Setup on a Microsoft® Windows NT® system.
- ◆ All programs and applications must be closed on the PC. If the system detects an active program or process during the installation routine, a notification to close them may display.
- ◆ To view the online documentation, Microsoft Internet Explorer 5.5 must be set as your default browser.

- ◆ Before attempting an EM store installation, you must disable at corporate the PM Access options that allow users to transfer items into, or order items for, a cost center to which the item does not belong. These options are:
 - ◆ Allow selection of cost centers where item is not assigned (Ordering)
 - ◆ Allow selection of cost centers where item is not assigned (Receiving)
 - ◆ Allow the transfer of items into cost center where they do not exist

Currently, these options are not available at the store level unless they are selected at Corporate. Failure to disable them means the store will have access to EM-managed definitions tables and can result in edits to the Corporate database.

- ◆ Three new options were added to the *Setup / Adjustments / General* form in Product Management (PM) application for the RES 3.1 release and are not available (i.e., will not be received) in any store running version 2.6 or 3.0 software. The options are:
 - ◆ **Adjustment category** — the *Tax* option was added to the drop-down list
 - ◆ **Inclusive charge**
 - ◆ **Include in item cost**

If these options are configured at a corporate office running version 3.1 and sent to the version 2.6 and 3.0 stores, the stores will not be able to process the change and the adjustment will not work as configured.

Installing the Enterprise Management Software

This section describes the requirements and procedures for installing Enterprise Management (EM) Version 3.1 software.

For clarity, the instructions have been divided into two parts:

- ◆ **New Installations** — Includes procedures for creating a corporate EM database and synchronizing the data flow to and from the stores.
- ◆ **Upgrades** — Provides guidance for upgrading an existing EM environment from Version 2.6 software to Version 3.1.

As you review these methods, keep in mind that the installation process requires more than a simple walk-through of the EM application CD. Instead, it involves a sequences of events that must be coordinated between multiple locations (corporate and store). The lag time between these events may vary, depending on the complexity of the corporate database, the duration of the pilot program, and the number of enterprise stores to be brought online.

To meet the basic system requirements for EM setup, administrators may need to install, access, or configure other (i.e., non-EM) applications or service pack software. These are noted at the appropriate place in the event sequence.

It is not within the scope of this document to provide detailed instructions for installing and using the RES application suite and supporting software. For information on a specific product, consult the documentation provided by the vendor or refer to *How to Locate Information on Software Installation* on page 4 of this document.

New Installations

There are two methods for accessing the Enterprise database: 1) corporate server, and 2) corporate client PC. Complete instructions for implementing each method are described below.

Running on a Corporate Server

The corporate server setup is required for EM maintenance activities to be conducted from the corporate server or the corporate client PC. Follow this sequence of events and processes:

1. Establish a Pilot Store.

- ◆ Install RES 3000 software in one or more of your enterprise stores. These will become the pilot or test stores on which a foundation database is built.

***Note** Micros recommends a pilot installation of two stores. This allows you to familiarize yourself with RES 3000 configuration tools and operations, to identify store requirements (shared and store-specific), and to establish a stable database.*

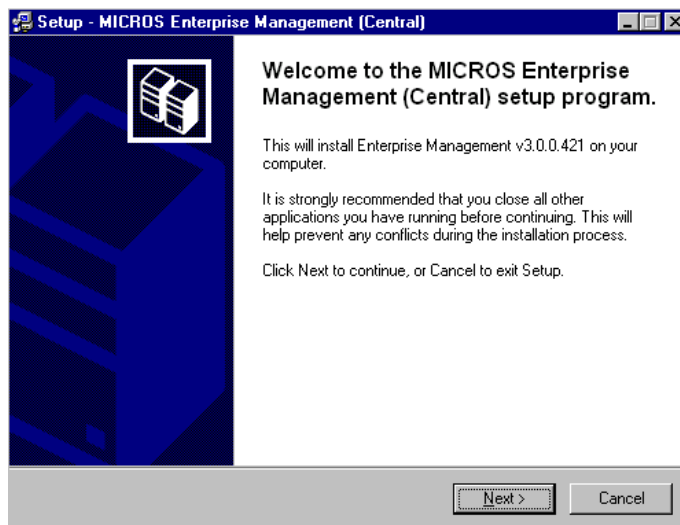
- ◆ Install RES 3000 Service Pack 4 software at each of the pilot store locations.
- ◆ Configure the RES software for the pilot store location. The POS and Labor Management software must be configured initially. Product Management and Financial Management may be configured at a later time.
- ◆ When the store is operating satisfactorily, make a copy of the database and log file using the Windows NT **Copy** command. Save this copy to disk or paste it into a temporary folder, accessible to the corporate server.

2. Create a Corporate Database.

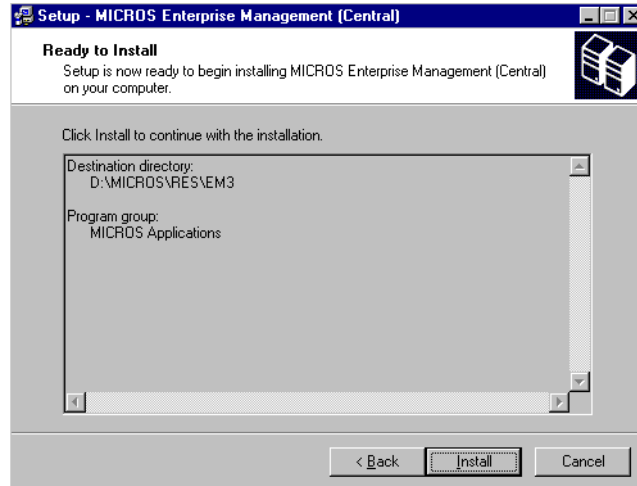
- ◆ Install RES 3000 and RES 3000 Service Pack 4 software on the corporate server.
- ◆ From the Windows Explorer, navigate to the \Micros\Database\Data folder. Delete the shell **Micros.db** and **Micros.log** files that were installed with RES 3000.
- ◆ Retrieve the pilot store database and log file from the temporary directory or disk and paste it into the \Micros\Database\Data folder on the server. The files should be called **Micros.db** and **Micros.log**, respectively. If not, rename them at this time.

3. Install EM on the Server.

- ◆ Insert the Enterprise Management CD on the corporate server.
- ◆ From the Windows Explorer, navigate to the CD drive's main directory and double-click on **CentralSetup.exe** to launch the application. When the Welcome screen is displayed, select **Next**.

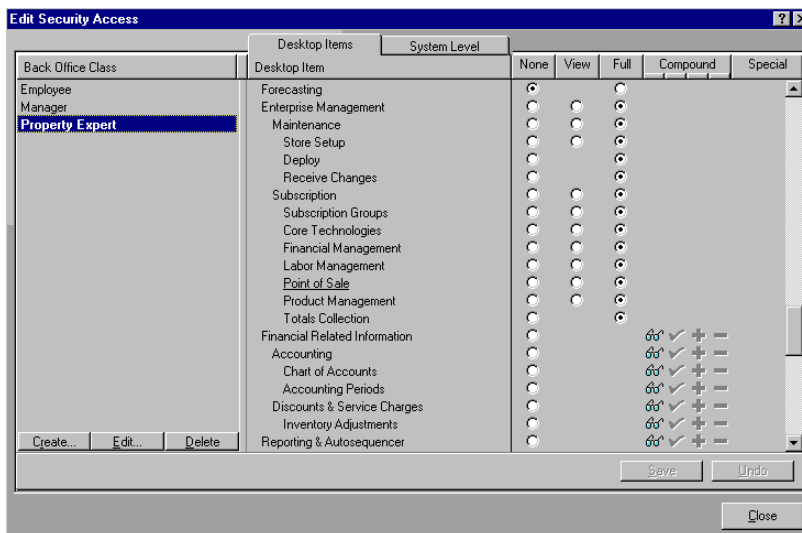


- ◆ The EM Setup screen is displayed, indicating the path where the application files will be installed. Select **Install** to continue.



Note *Enterprise Management is installed automatically on the same drive as RES 3000, in the \Micros\RES\EM3 directory tree. This path cannot be changed by the end user.*

- ◆ Once the EM installation is complete, open the POS Configurator and select **Employees | Back Office Classes**. The Edit Security Access Form is displayed.



- ◆ Update the security levels to allow selected employees to access the newly installed EM forms. Changes can also be made to other back office classes, if required.

4. Purge the Database Totals.

- ◆ Open the POS Configurator and select **Totals** from the menu bar to display a drop-down list of options.
- ◆ Select **Clear All Totals**. A confirmation dialog box is displayed. Select **Yes** to continue. When the process is complete, a second dialog box is displayed with a prompt to restart POS Operations. Since POS Ops is not in use, ignore this advisory.
 - ◆ If a message to shutdown Database Server Remote Procedure Call (DBSRPC) appears, you may ignore the message and proceed with purging totals.

Note *This procedure deletes the totals that were generated in the pilot store.*

- ◆ If the Product Management (PM) application is installed and will be managed from the corporate office, the PM transaction totals may also be cleared from the database. To do this:
 - ◆ Open the PM application and click **Utilities**. A short-cut menu is displayed.
 - ◆ Select **Clear All Transaction/Totals**. When the confirmation dialog box is displayed, select **Yes** to clear all Product Management transactions and totals.

5. **Configure the Corporate Environment.**

- ◆ Go to *Setting Up the Corporate Database* on page 29 to complete this part of the installation.

6. **Activation of a Store.**

Note *A store should be activated at corporate prior to installing EM on the store server.*

- ◆ From the Windows Start Menu, select **Programs | MICROS Applications | Enterprise Management** to launch the MICROS Enterprise Configuration Utility (MECU).
- ◆ Log into the EM application. The MECU splash screen is displayed.
- ◆ Select the **Store Setup** icon from the Feature Selection Panel.
- ◆ Select the store to be activated.
- ◆ Right-click and select Edit Store to display the Store Information form.
- ◆ Select the Active check box and click the Apply button.
- ◆ Select the **Deploy** icon from the Feature Selection Panel to create the initial synchronization file for the selected stores.

7. Send the initial synchronization file to the store. Place this file in a temporary directory.

Running on a Store Server

1. Install EM at the Enterprise Stores.

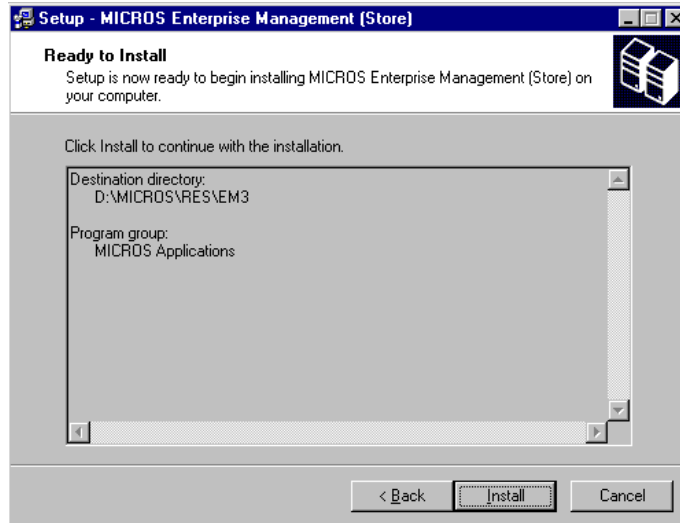
Note *Prior to running store setup, you will need to know the Store ID that has been assigned to the enterprise store at corporate. To locate the Store ID:*

- ◆ *Select Store Setup from the Micros Enterprise Management Utility (MECU).*
- ◆ *Select the store that is being setup and note the value in the Store ID column.*

-
- ◆ Close all Micros programs and applications.
 - ◆ Shutdown the Micros database from the Micros Control Panel.
 - ◆ Insert the Enterprise Management CD on the store server.
 - ◆ From the Windows Explorer, navigate to the CD drive's main directory and double-click on **StoreSetup.exe** to launch the application. When the Welcome screen is displayed, select **Next**.

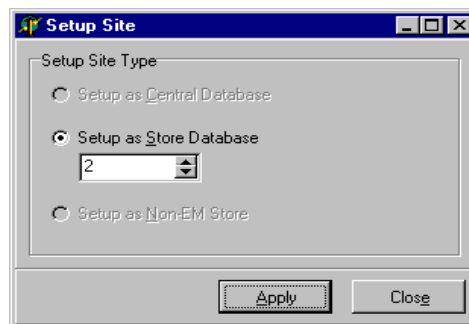


- ◆ The EM Setup screen is displayed, indicating the path where the application files will be installed. Select **Install** to continue.



***Note** Enterprise Management is installed automatically on the same drive as RES 3000, in the \Micros\RES\EM3 directory tree. This path cannot be changed by the end user.*

- ◆ After the files are copied to the local drive, the Setup Site screen is displayed.



- ◆ Select **Setup as Store Database** to apply a unique identifier for this store within the EM system.

Note *Database ID (Store ID) numbers are assigned automatically when a new store is added to the EM system. This identifier allows EM to synchronize the flow of data between the corporate office and the enterprise stores. If an incorrect Database ID was entered, run SetStore.exe from the \Micros\RES\EM3\Utilities directory and enter the correct ID number.*

If the store is removed from the EM system, the number will not be reassigned.

- ◆ Click **Apply**.
2. After setup is completed, reboot the server.
 3. Open the MICROS Control Panel and shut down everything except the SQL Database Server.
 4. Copy the initial synchronization file from the temporary directory to the \Micros\RES\EM3\Receive folder.
 5. Receive the initial synchronization file into the store by launching the **Receive.exe** application from the \Micros\RES\EM3\Bin directory.

Note *Any managed definitions and totals are purged from the store database as part of receiving the initial synchronization file.*

6. After receiving the synchronization file, link the corporate-managed configurations with store-managed configurations, if necessary.

Example *The corporate office is responsible for managing security, which includes employee classes. The employee classes must be linked to each employee once the synchronization file is received.*

Running on a Corporate Client

The corporate client option is used when multiple users require access to the corporate server to execute reports, make configuration changes, etc. In this case, EM setup and maintenance activities are managed through a client PC connected to the corporate database (located on the corporate server).

Note *It is recommended that Deploy and Receive are run from the corporate server and not the corporate client.*

To implement this method, the corporate server setup must already be in place. Once the server is operational, follow these procedures to set up a corporate client:

Warning! *There cannot be any other MICROS applications installed on the corporate client PC at the time of setup. Before you begin, make sure that any previously installed MICROS applications have been removed.*

1. Create the Corporate Client.

- ◆ From the Client PC, map a drive to the `\ServerName\Netsetup` directory on the corporate server.
- ◆ Double-click **Setup.exe** in the `\ServerName\Netsetup\Setup` folder to install the client.
- ◆ Select the default options as prompted, but do not select to install the touchscreens.
- ◆ When the installation is finished, the system will automatically reboot.

2. **Install EM on the Client.**

- ◆ Insert the Enterprise Management CD on the client PC.
- ◆ From the Windows Explorer, navigate to the CD drive's root directory and double-click on **CentralSetup.exe** to launch the application. When the Welcome screen is displayed, select **Next**.
- ◆ The EM Setup screen is displayed, indicating the path where the application files will be installed. Select **Install** to continue.

System Upgrades

Before installing EM Version 3.1 software on an existing Enterprise Management system, the corporate server must be upgraded to RES 3000.

The enterprise stores can continue to operate with RES 2.6 software, and simply upgrade to EM Version 3.1. However, new or enhanced functionality included in RES Version 3.1 (e.g., multi-cost) will not be available to the stores until they are also running RES 3.1.

Before upgrading to EM Version 3.1, an enterprise store must have installed EM Version 2.6 Service Packs 1 and 2. Both files must be applied in the proper sequence. If Sp2 was applied without first applying Sp1, you must take the following steps before attempting to upgrade to EM 3.1:

- ◆ Apply **EM 2.6 Sp1**

Sp1 must be applied by using **Setup.exe**, located in the **\\EM26Patch1\Setup** folder. This folder was created by unzipping **EM26Patch1.zip** from the **EM_ServicePacks** folder on the **EM 3.1 CD**.

Do NOT apply **Sp1** by running the **Update.exe** (from the **\\EM26Patch1\StoreUpdates\Version260C** folder).

- ◆ Reapply **EM 2.6 Sp2**
- ◆ Run **EM 3.1 StoreSetup.exe**.

Updating the Corporate Office

This section describes the procedures required to update the corporate office to RES 3000 and to bring all stores (including corporate) up to EM Version 3.1.

At the Corporate Office

1. With the current RES and EM applications still at Version 2.6, check for replication files that may not have been sent to or acknowledged by the store. Process any pending changes.
2. Copy and distribute the following files to the enterprise stores and place them in the same directory:
 - ◆ **CheckPatchVersion.bat**
 - ◆ **Confirm_EM_Version.sql**
 - ◆ **RunStoreSetup.bat**
 - ◆ **StoreSetup.exe**

These files can be found on the Enterprise Management CD in the Tools folder.

3. Execute a backup of the corporate database with validation.
4. Copy EMConvertHelper.exe from the **\Tools** directory on the Enterprise Management CD to the **\Micros\Common\Scripts** directory. Run the **EMConvertHelper.exe** application.
5. Install RES Version 3.1 software on the corporate server. When prompted, select the option to convert the existing database.
6. Install RES Version 3.1 Service Pack 1 on the corporate server.

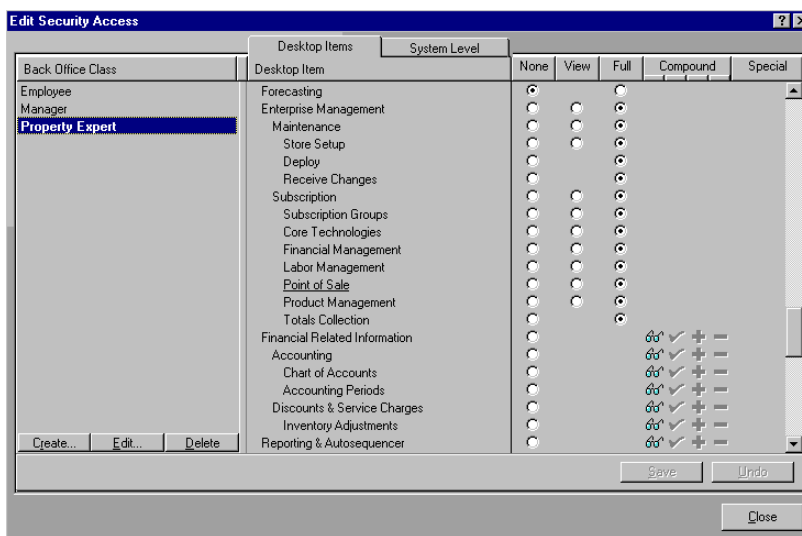
7. Install EM 3.1 on the corporate server.
 - ◆ Shutdown the Micros database from the Micros Control Panel.
 - ◆ Insert the Enterprise Management CD on the corporate server.
 - ◆ From the Windows Explorer, navigate to the CD drive's root directory and double-click on **CentralSetup.exe** to launch the application. When the Welcome screen is displayed, select **Next**.
 - ◆ The EM Setup screen is displayed, indicating the path where the application files will be installed. Select **Install** to continue.
 - ◆ Once the EM files are copied to the specified directory, the installation starts subscription conversion to migrate information from the previous EM version format to the new subscription format.
 - ◆ Select the following options for creating subscription groups, if necessary.
 - ◆ (Optional) Select the **Translate Section-Versions to Subscription Groups** option to convert what was formerly referred to as section-versions into Subscription Groups. For example, if an Appetizer section contained three versions (Core, East Region, and West Region), a Subscription group would be created for each version. All items that were subscribed to the versions are now assigned to the appropriate subscription groups.
 - ◆ (Optional) Select the **Add stores to translated Section-Versions** option to assign stores to the appropriate subscription group based on the previous version assignments. If this option is not selected, stores may be assigned after subscription conversion has completed.

***Note** If no options are selected, subscriptions are converted with items subscribed directly to the stores.*

- ◆ Click the Start button to start the EM Subscription Conversion.

8. Setup the System Security.

- ◆ Once the EM installation is complete, open the POS Configurator and select **Employees | Back Office Classes**. The Edit Security Access Form is displayed.



- ◆ Update the security levels to allow selected employees to access the newly installed EM forms. Changes can also be made to other back office classes, if required.

Note *At least one Back Office class must be configured and assigned to the employee(s) that will access the Micros Enterprise Configuration Utility (MECU).*

9. Open the Micros Enterprise Configuration Utility (MECU) and select **Deploy**.

10. Select all of the active stores to create a change file for each store.

11. Distribute the change files to the stores.

At the Enterprise Stores

1. Run the End-of-Day autosequence.
2. Execute the **runStoreSetup.bat** file supplied by the Corporate Office. When the batch file is run, the system checks the database to confirm that the appropriate EM version and patches have been installed.
 - ◆ If the database is not EM 2.6 with Patches 1 and 2 installed, setup will be aborted and a file called **EM_Version_Confirm.txt** will be placed in the root of the **C:** directory.
 - ◆ If the database meets the version patch requirements, installation will continue. The system will automatically perform a backup of the database, shut down the clients, and auto-install the EM 3.1 software upgrade.
3. When the installation is complete, the system will restart, bringing the clients online. The diskless clients may not restart automatically. If the blue screen appears on the diskless clients, power the systems off/on.
4. Once the Version 3.1 installation is complete, the store creates a deployment package and sends it back to Corporate. This package contains information required to populate the DB Version tables used to determine feature subscription availability at the enterprise store.
5. After the version information is received at Corporate, the last step is to receive a change file generated by the Corporate Office for the purpose of resynchronizing the store's touchscreens.

Updating the Stores

This section describes the procedures required to bring the stores up to RES Version 3.1.

At the Enterprise Store

1. Run the End-of-Day autosequence.
2. Execute a database backup with validation, if it is not already a part of the End-of-Day process.
3. Copy EMConvertHelper.exe from the \Tools directory on the Enterprise Management CD to the \Micros\Common\Scripts directory. Run the **EMConvertHelper.exe** application.
4. Install RES Version 3.1 software on the store server. When prompted, select the option to convert the existing database.
5. Install RES Version 3.1 Service Pack 1 on the store server.
6. From the main directory on the Enterprise Management CD, double-click on **StoreSetup.exe** to install the EM 3.1 software
7. Start the database on the store server.
8. Create a deployment file containing version information and send this to the Corporate Office.

At the Corporate Office

1. After receiving the version update files from the stores, create a synchronization file for each of them.
 - ◆ From the MECU, select **Maintenance | Deploy** to open the form.
 - ◆ In the explorer panel, expand the **Store** node and check the boxes next to the stores to be upgraded.
 - ◆ Select **Synchronize Stores** from the **Options** menu.
2. Send the synchronization file to each store. Place this file in a temporary directory.

At the Enterprise Store

1. Receive the synchronization file generated by the Corporate Office.

Setting Up the Corporate Database

Once the software is installed on the corporate server, the next step is to configure the corporate database. This section provides step-by-step instructions for completing each of the tasks required to set up the corporate environment. These tasks include:

- ◆ Defining Stores
- ◆ Organizing the Menu Item Data
- ◆ Creating a Pricing Structure
- ◆ Implementing Other EM Changes
- ◆ Creating Touchscreen Versions
- ◆ Assigning Touchscreen Versions to Stores
- ◆ Managing Jobs and Default Pay Rates
- ◆ Setting Up Subscriptions by Product
- ◆ Configuring Totals Collections

Defining Stores

Enterprise Management revolves around the setup, distribution, collection, and interpretation of data passed between the corporate office and its sales units, the enterprise stores. To accomplish this, the user must first identify all the stores (corporate and enterprise) within the EM system and establish a link between them.


This stage has been divided into three parts:

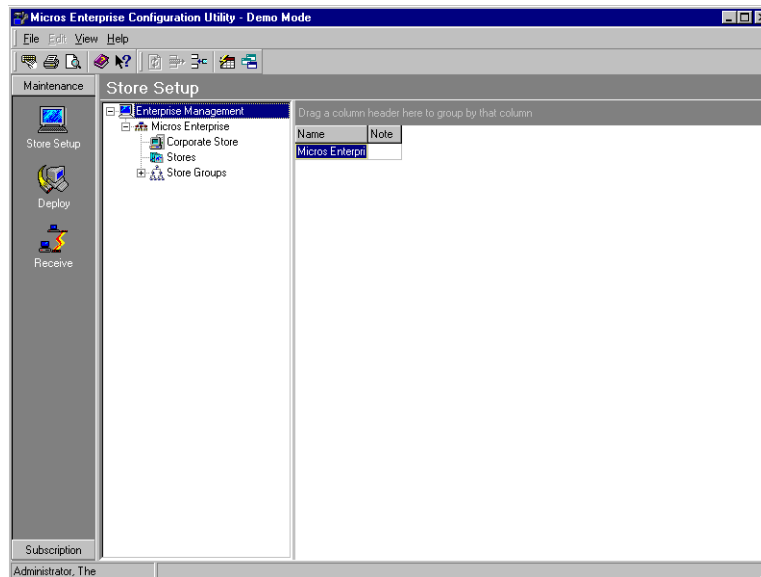
- ◆ Editing the Corporate Store
- ◆ Adding an Enterprise-Managed Store
- ◆ Creating a Store Group

Editing the Corporate Store

During a new installation, EM recognizes and creates the corporate entity, automatically assigning it a **RES Store ID** value of *1*. EM uses this value to distinguish the Corporate site from the enterprise-managed stores.

Follow these steps to complete the corporate store profile:

1. Open the Micros Enterprise Configuration Utility (MECU) and select the **Maintenance** button from the feature selection panel on the left. The slide bar repositions to display the available functions.
2. Click the *Store Setup* icon. The Explorer Panel expands to display the hierarchical structure of the EM system. 
3. Click the *Corporate Store* node to expand the store information table in the task area. Notice that, with the exception of the **Name**, the rest of the data fields are blank.



4. Double-click on the *Corporate Store* table entry to open the Store Information form.

5. On the main panel of the form, enter the following information:

- ◆ **Number**—A unique value that identifies this location as the corporate store. This is a user-defined value of up to 9 digits.:

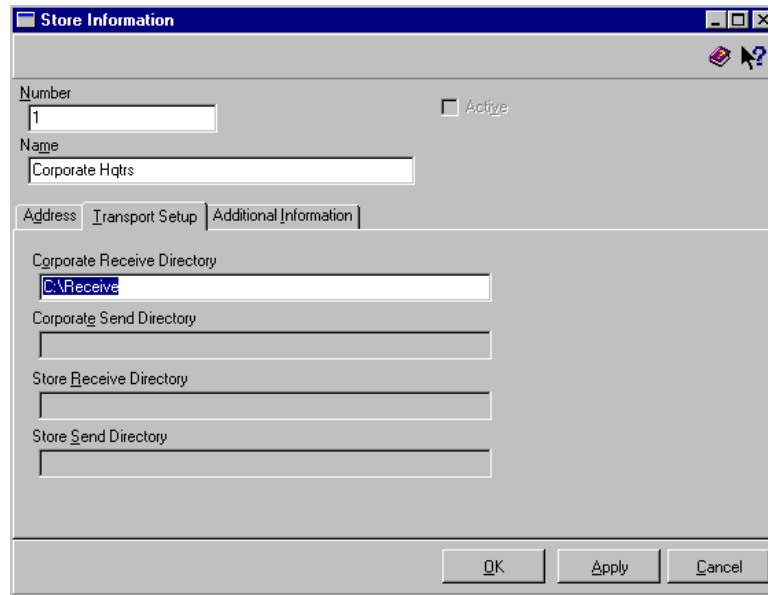
***Note** The store number assigned here should not be confused with the RES Store ID assigned during system installation. The RES Store ID is a system-defined value, applied sequentially as new stores are added to the database. Store numbers allow an organization to retain or apply its own structure for identifying stores.*

- ◆ **Name**—A unique name to identify the corporate store. Up to 16 alphanumeric characters is allowed.

6. (Optional) Go to the **Address** tab and enter the following:

- ◆ **Address**—The street address of the corporate store.
- ◆ **City**—The city where the corporate store resides.
- ◆ **State**—The state (full name or abbreviation) where the corporate store resides.
- ◆ **Postal Code**—The zip or postal code for the corporate store's location.
- ◆ **Country**—The name (full or abbreviated) of the country where the corporate store resides.
- ◆ **Phone 1**—The main phone number for the corporate store.
- ◆ **Phone 2**—A secondary phone number, like a fax number, for the corporate store, if applicable.

7. Go to the **Transport Setup** tab and enter the following:




The screenshot shows a Windows-style dialog box titled "Store Information". It has three tabs: "Address", "Transport Setup" (which is selected), and "Additional Information". In the "Transport Setup" tab, there are four text input fields labeled "Corporate Receive Directory", "Corporate Send Directory", "Store Receive Directory", and "Store Send Directory". The "Corporate Receive Directory" field contains the text "C:\Receive". At the top of the dialog, there is a "Number" field with the value "1" and an "Active" checkbox which is unchecked. At the bottom of the dialog, there are three buttons: "OK", "Apply", and "Cancel".

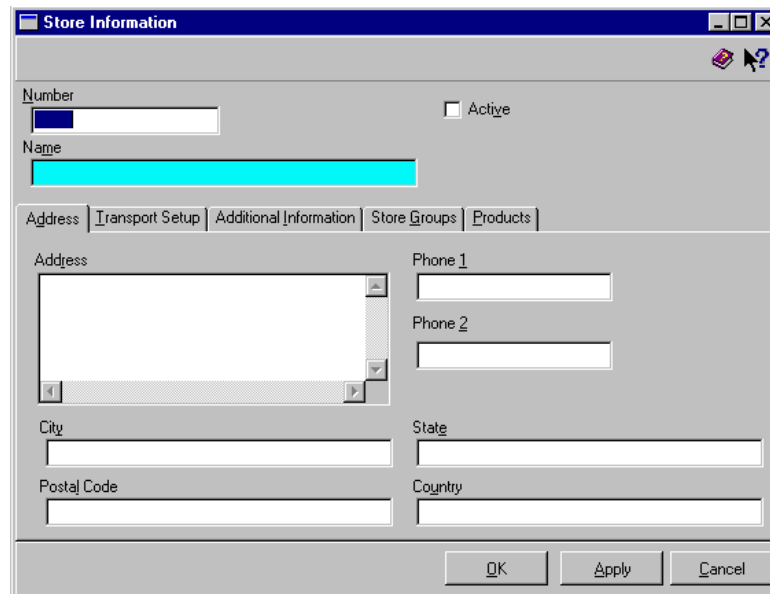
- ◆ **Corporate Receive Directory**—Indicates the full directory path (including drive letter) where deployment files received from stores will be placed on the corporate server.
8. (Optional) Go to the **Additional Information** tab and enter the following:
 - ◆ **User-Defined 1-4**—Includes any pertinent data that may be useful in the administration of the corporate store activities (e.g., the name of the system administrator, emergency contacts, etc.).
 - ◆ **User-Defined Comment**—Includes any pertinent data that may be useful in the administration of the corporate store activities.
 9. Click **Apply** to update the corporate record.

Adding an Enterprise-Managed Store

Once the corporate store is defined, the next step is to add a database record for each of the enterprise-managed stores.

Follow these steps to add a new store to the corporate database:

1. Open the Micros Enterprise Configuration Utility (MECU) and select the **Maintenance** button from the feature selection panel on the left. The slide bar repositions to display the available functions.
2. Click the *Store Setup* icon. The Explorer Panel expands to display the hierarchical structure of the EM system. 
3. Click the *Stores* node to expand the store information table in the task area.
4. To add a new store, right-click on the *Stores* node to open the shortcut menu and select the *Add New Store* option. A blank Store Information form is displayed.



The screenshot shows a window titled "Store Information" with a standard Windows-style title bar. The form contains the following fields and controls:

- Number:** A text input field.
- Active:** A checkbox.
- Name:** A text input field.
- Navigation Tabs:** A set of tabs including "Address", "Transport Setup", "Additional Information", "Store Groups", and "Products".
- Address:** A large text area for the main address.
- Phone 1:** A text input field.
- Phone 2:** A text input field.
- City:** A text input field.
- State:** A text input field.
- Postal Code:** A text input field.
- Country:** A text input field.
- Buttons:** "OK", "Apply", and "Cancel" buttons at the bottom right.

5. On the main panel of the form, enter the following information:

- ◆ **Number**—A unique value that identifies this location. This is a user-defined value of up to 9 digits.:

***Note** The store number assigned here should not be confused with the RES Store ID assigned during system installation. The RES Store ID is a system-defined value, applied sequentially as new stores are added to the database. Store numbers allow an organization to retain or apply its own structure for grouping stores.*

- ◆ **Name**—A unique name to identify the enterprise-managed store. Up to 16 alphanumeric characters is allowed.
- ◆ **Active**—When checked, indicates that this store is an active member of the EM system. This option must be checked before the store can send to or receive data from the central (corporate) database.

***Note** It is recommended that all subscriptions for a store are defined prior to activating the store.*

6. (Optional) Go to the **Address** tab and enter the following:

- ◆ **Address**—The street address of the enterprise store.
- ◆ **City**—The city where the enterprise store resides.
- ◆ **State**—The state (full name or abbreviation) where the enterprise store resides.
- ◆ **Postal Code**—The zip or postal code for the enterprise store's location.
- ◆ **Country**—The name (full or abbreviated) of the country where the enterprise store resides.

- ◆ **Phone 1**—The main phone number for the enterprise store.
- ◆ **Phone 2**—A secondary phone number, like a fax number, for the enterprise store, if applicable.

7. Go to the **Transport Setup** tab and enter the following:

The screenshot shows a Windows-style dialog box titled "Store Information". The "Transport Setup" tab is selected. The "Number" field contains "101" and the "Active" checkbox is checked. The "Name" field contains "Baltimore Cafe". Below the tabs, there are three text boxes for directory paths: "Corporate Send Directory" (D:\MICROS\RES\EM3\TRANSPORT\SEND\Baltimore Cafe), "Store Receive Directory" (C:\MICROS\RES\EM3\TRANSPORT\RECEIVE), and "Store Send Directory" (C:\MICROS\RES\EM3\TRANSPORT\SEND). At the bottom are "OK", "Apply", and "Cancel" buttons.

- ◆ **Corporate Send Directory**—Indicates the full directory path (including drive letter) where deployment files created for the stores will be placed on the corporate server. The default path is:

c:\MICROS\RES\EM3\TRANSPORT\SEND\Store Name

(where c:\ represents the drive on which MICROS is installed).

Note *The store name is automatically appended to the directory path when a store is added to the Enterprise through the Store Setup process. A store name that contains invalid filename characters (/, \, :, *, ?, >, <, “, |) will automatically be replaced with the underscore.*

The directory path may be changed at a later date.

- ◆ **Store Receive Directory**—Indicates the full directory path (including drive letter) where deployment packages received from the corporate database will be placed on the store’s server. The default path is:

c:\MICROS\RES\EM3\Transport\Receive

where c:\ represents the drive on which MICROS is installed.

Note *Deployment packages created by corporate are used to add or update configuration items in the store’s database.*

When a new store is added to the enterprise, a default Receive folder is defined. To avoid confusion, MICROS recommends using the same receive directory paths for all of the enterprise-managed stores. The default directory paths may be changed at a later date.

- ◆ **Store Send Directory**—Indicates the full directory path (including drive letter) where deployment files to be sent to the corporate database will be stored on the store’s server. The default path is:

c:\MICROS\RES\EM3\Transport\Send

where c:\ represents the drive on which MICROS is installed.

Note *Deployment packages created by the enterprise-managed stores contain acknowledgment of the receive status of the database updates along with the store totals required for corporate reports.*

When a new store is added to the enterprise, a default Send folder is defined. To avoid confusion, MICROS recommends using the same send directory paths for all of the enterprise-managed stores. The default directory paths may be changed at a later date.

8. (Optional) Go to the **Additional Information** tab and enter the following:

The screenshot shows the 'Store Information' dialog box with the 'Additional Information' tab selected. The dialog has a title bar with 'Store Information' and standard window controls. Below the title bar are icons for help and a question mark. The main area contains several input fields: 'Number' (a small blue box), 'Name' (a large cyan box), and four 'User-Defined' fields (User-Defined 1 through 4) stacked vertically. To the right of these fields is a 'User-Defined Comment' text area. At the bottom right are 'OK', 'Apply', and 'Cancel' buttons. The 'Additional Information' tab is highlighted in the tab bar, which also includes 'Address', 'Transport Setup', 'Store Groups', and 'Products'.

- ◆ **User-Defined 1-4**—Includes any pertinent data that may be useful in the administration of the corporate store activities (e.g., the name of the store/regional managers, emergency contacts, etc.).
 - ◆ **User-Defined Comment**—Includes any pertinent data that may be useful in the administration of the corporate store activities.
9. (Optional) Go to the **Store Groups** tab and place a check next to each group to which this store belongs. A store may belong to one, several, or all groups listed.

***Note** Store groups may be created before or after the enterprise stores are added to the corporate database. If this screen is blank, or if the requisite group is not listed, go to the subsection Creating a Store Group on page 39 and follow the procedures included there to generate or add to the listing.*

10. (Optional) Go to the **Products** tab. Select one of the radio button to identify the RES software version currently installed at this store location. The options are:
- ◆ Micros RES v2.6
 - ◆ Micros RES v3.0
 - ◆ Micros RES v3.1

***Note** This option does not install software on the system, but is used to track which stores have been upgraded to RES 3000.*

11. Click **Apply** to update and save the record.


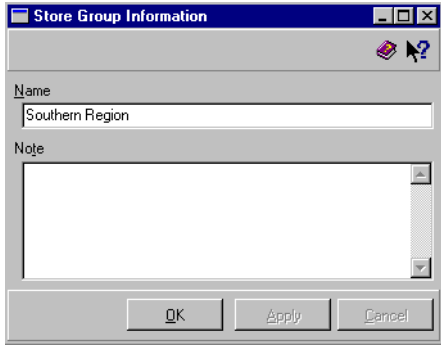
Creating a Store Group

As the number of stores in the corporate EM database increases, the time and effort required to manage and update data on a store-by-store basis can be prohibitive. To speed up the process, EM allows the user to define subsets or groups of stores that receive the same data from the Corporate Office. These store groups provide the mechanism for maintaining subscriptions to multiple stores as well as consolidating reporting data.

Store Group Types

Stores may be grouped in any way that makes sense to the organization, although the most common method is based on geography (state, region, or district). Store groups are not required. That is, a store does not have to belong to a group to receive updates. Similarly, a store is not limited to membership in one group but may belong to several concurrently.

Follow these steps to create a new store group:

1. Open the Micros Enterprise Configuration Utility (MECU) and select the **Maintenance** button from the feature selection panel on the left. The slide bar repositions to display the available functions.
2. Click the *Store Setup* icon. The Explorer Panel expands to display the hierarchical structure of the EM system. 
3. To add a new store group, right-click on the *Store Groups* node to open the short-cut menu and select the *Add Store Group* option. A blank Store Group Information form is displayed. 
4. In the **Name** field, enter a unique name for this store group.
5. In the **Notes** field, enter any comments or instructions relevant to this store group.

6. Click **Apply** to save the record.

Organizing the Menu Item Data

Once store setup is complete, the next step is to organize the data. To do this, MICROS recommends creating a master list of all the menu items sold throughout the enterprise. From this list, the user can determine which menu items are common to all stores and which are regional or unique. Also noted are menu item prices, including any variations that may exist between locations.

Purpose

Creating a corporate menu item master list is a critical part of managing the enterprise. Menus and menu item prices often vary from region to region, and even store to store. The master list gives the corporate administrator a global view of the enterprise, allows him/her to determine regional differences and inconsistencies, and provides a basis for designing a simplified corporate pricing structure. By standardizing the database, the corporate office can respond promptly to market price fluctuations, control inventory levels, and implement regional promotions in less time and with less error.

Implementation

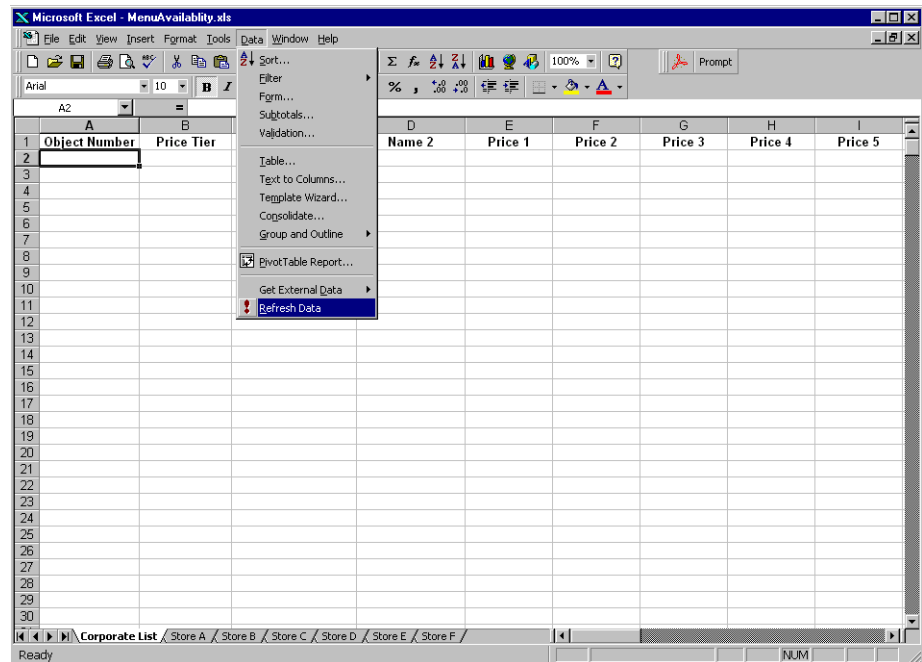
To help the EM user get started, MICROS has included a sample Excel spreadsheet file with the EM application software. The sample spreadsheet comprises seven worksheets, one each for the corporate office and six enterprise stores. Also included is a query file programmed to extract relevant information from the database and to post it to the sample spreadsheet. This data becomes the starting point for gathering and analyzing menu item variations across the enterprise.

When this process is complete, the corporate administrator should have a worksheet for each store (listing store-specific menu item data) as well as the corporate worksheet or master list, which is a compilation of menu item data from all of the enterprise stores.:

Note *The sample spreadsheet is supplied for the convenience of the EM user only. If the menu item information already exists in another format, proceed directly to **Creating Price Groups** on page 46.*

Follow these steps to generate the menu item pricing data (from the pilot store database):

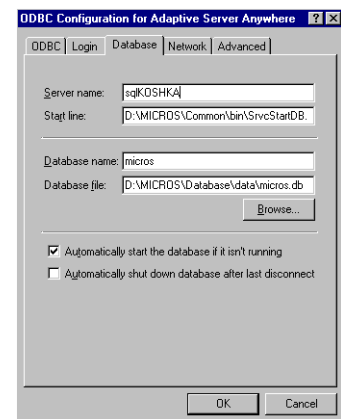
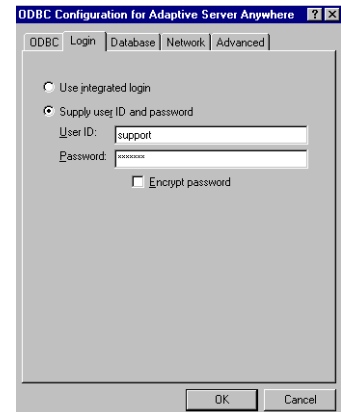
1. Create a samples folder on the corporate server's hard-drive.
2. Insert the Enterprise Management CD on the server. From the Windows Explorer, navigate to the CD drive's root directory and locate the sample **MenuAvailability.xls** (spreadsheet) and **MenuItemPriceList.dgy** (Microsoft Excel query) files. Copy these files to the samples folder.
3. Navigate to the samples folder (on the hard-drive) and double-click **MenuAvailability.xls** to open the spreadsheet template in Excel. The spreadsheet contains one corporate worksheet and six store worksheets labeled Store A-F.
4. Select the Corporate worksheet and place the cursor in column A, field 2.
5. From the Excel menu bar, select the **Data | Refresh Data** option.



- The system launches the ODBC Configuration utility, which allows the user to establish a connection and extract information from the database. Select the **Login** tab. :

Note *To do this, Microsoft Query, a database utility, must be installed on the system.*

- Enter *Support* in both the **User ID** and **Password** fields.
- Go to the **Database** tab.
- In the **Server Name** field, enter the name of the corporate server preceded by sql (e.g. *sqlCorporate*).
- Enter the full directory path (including drive letter) where the pilot database (Micros.db) resides. If unknown, use the **Browse** button to locate.
- Click **OK** to run the database query, **MenuItemPriceList.dqy**.



12. When the query is complete, the results are recorded on the corporate worksheet and copied automatically to the six store worksheets.

Object Number	Price Tier	Name 1	Name 2	Price 1	Price 2	Price 3	Price 4
obj_num	price_grp_seq	name_1	name_2	preset_amt_1	preset_amt_2	preset_amt_3	preset_amt_4
1		BMILK FIVE	BMILK FIVE	4.29	4.59		
2		PIGS IN BLANKET	PIGS	5.29			
3		BLUE PANCAKES	BLUE CAKES	5.29			
4		STRAW PANCAKES	STRW CAKES	5.29			
5		POTATO PANCAKES	POT CAKES	5.29			
6		PANCAKE (1)	CAKE - ONE	1.19			
7		EXTRA		5.99			
11		SHORT STACK	1/2 BMILK	3.79			
12		PIGS SHORT	1/2 PIGS	2.95			
13		BLUE SHORT	1/2 BLUE	4.49			
14		STRAW SHORT	1/2 STRAW	4.49			
15		POTATO SHORT	1/2 POTATO	3.29			
21		FRENCH TOAST	FR TOAST	4.29			
22		FR TST SHORT	1/2 FR TOAST	2.99			
23		FRENCH TOAST (1)	FR TST - ONE	0.99			
31		BELGIAN WAFFLE	WAFFLE	4.29			
32		BLUE WAFFLE	BLUE WAF	4.29			
33		STRAW WAFFLE	STRAW WAF	4.29			
50		TREM 12	TREM 12	4.99			
51		SIRLOIN/EGGS	SIRLN/EGGS	6.99	7.99		
52		NY STRIP/EGGS	NY STRP/EGGS	8.99			
53		CTRY FRY BKFST	CTRY STK/EGG	7.39			
54		HAM STK/EGGS	HAM STK/EGGS	4.69			
55		CLASSIC: PATTY	CL: PATTY	4.69			
56		CLASSIC: LINKS	CL: LINKS	5.29			

13. If the number of stores in the enterprise is greater/smaller than six, add/delete store worksheets until there is one per store. Rename these worksheets to reflect the store names.

14. Print out the worksheets.

From here on, the process becomes a manual review and comparison to ensure that the menu items and menu item prices included in the pilot database are, in fact, an accurate representation of what is currently being sold at each enterprise store.

Discrepancies should be noted as follows:

- ◆ Add missing menu items (i.e., those sold but not listed in the pilot database) to the store worksheet. These menu items (and their prices) should also be included on the corporate master list.
- ◆ Remove from the store worksheets any menu item that is listed but not sold at that location.

- ◆ Compare the menu item prices listed on each store's worksheet. If the store's price differs from the one listed from the pilot database, change it on the store worksheet and added the revised price as a separate preset amount in the corporate master list.

Note *Price variations may be used to standardize prices across the enterprise and to determine the price groups and price tiers that are necessary.*

Creating a Pricing Structure

In building a menu item master list, the corporate administrator often uncovers variations in the prices charged by stores for the same menu items. The reasons for this are many, ranging from higher labor costs in some areas, to subtle changes in recipes and ingredients, to pricing errors during system setup. Prices may also differ within a store, depending on seasonal availability of products, local promotions, and neighboring competition.

To effectively manage an enterprise, it is necessary to develop a pricing structure by using price groups/tiers and effectivity dates.

Pricing Structure Overview

Price Groups and Price Tiers

Price Groups and Price Tiers allow the corporate office to control the price at which each menu item is sold and to standardize the way price changes are implemented. This is accomplished through the use of price groups and price tiers.

Price groups are logical subsets of menu items in the central database. For example, the Beer price group may be defined for the purpose of assigning beer menu items to this group to manage their prices. A menu item must be assigned to a price group. There is no limit to the number of price groups that can be generated; however, the fewer number of groups there are, the easier they are to manage.

Price tiers are components of a price group and are used to define variations in menu item pricing. For example, price tiers may be defined by market, such as city (high), suburban (medium), and rural (low). Each price group has at least one price tier assigned. Only one price tier may be active for each price group at a given time in each store.

Example

Cap'n Mike's restaurant chain has stores up and down the east coast, all of which sell seafood. Because it is a primary part of their menu, the central database includes a Seafood Price Group which comprises all seafood-related entrees (e.g., Lobster, Crab, Swordfish, etc.). However, seafood is less expensive in Baltimore than it is in Manhattan, but more costly than it is in Boston. To accommodate these price variations, three price tiers are set up for seafood: a high, medium, and low tier. Three sets of prices are listed for each seafood item in the database. When the prices are deployed to the stores, Boston implements the low tier prices, Baltimore uses the medium tier, and Manhattan uses the high tier.

Effectivity Dates

The second part of defining a pricing structure is to specify when the menu item prices will be active. This is done by using effectivity dates to schedule changes in the pricing structure of a store. Effectivity dates can be used to schedule changes to a menu item price and changes to a store's active price tier.

Example

As a Baltimore franchise in the Cap'n Mike's restaurant chain, the inner harbor store usually uses the medium price tier for its seafood entrees. However, during certain times of the year, the seafood costs are higher. When the seafood costs increase, the high price tier is implemented. This allows all seafood prices to be increased at once.

Configuring Menu Item Pricing

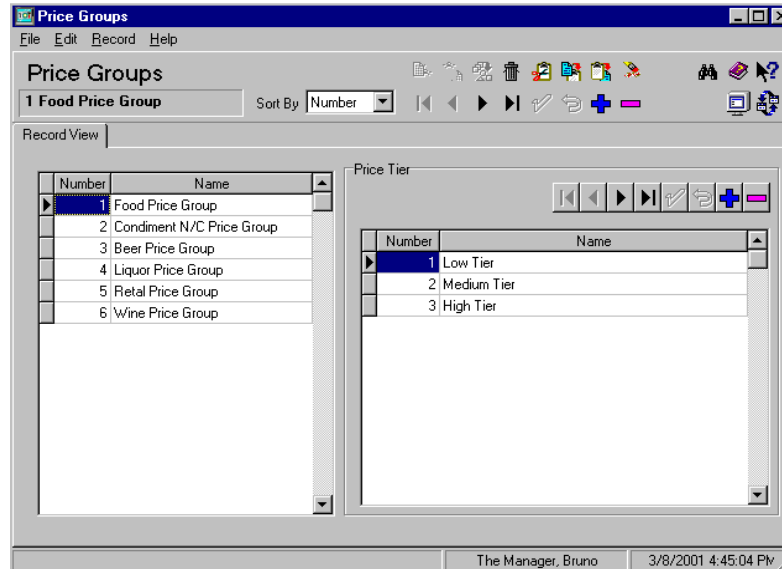
This section provides step-by-step instructions for setting up the POS Configurator to handle menu item pricing. The text has been divided into the following parts:




- ◆ Creating Price Groups and Price Tiers
- ◆ Assigning the Menu Item Price Groups and Price Tiers
- ◆ Assigning Price Tiers to Stores

Creating Price Groups and Price Tiers

Follow these steps to create price groups and price tiers:

1. Open the POS Configurator and select **Enterprise | Price Groups**.




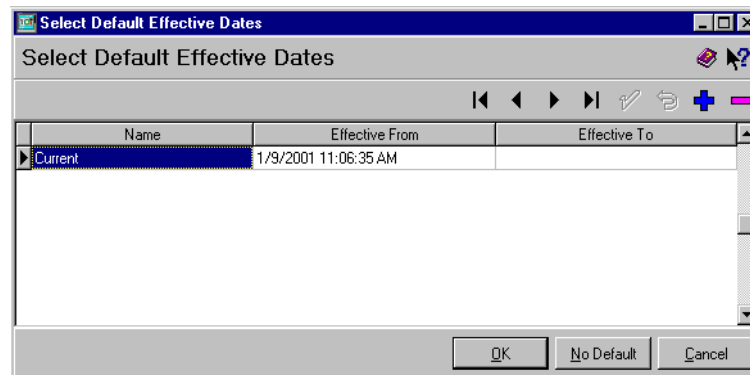
2. Click  to add a new price group record. The system will automatically insert the record at the bottom of the price group table. Price group numbers may be edited.
3. Enter a **Name** for this price group.
4. Go to the price tier table. Because every price group must have at least one price tier, a *Default* price tier was added automatically.
5. Highlight the *Default* price tier and rename, if necessary.
6. Using the navigation buttons above the price tier window, click  to add another price tier record. Repeat until all of the price tiers have been defined.
7. Click  save the record.
8. Repeat Steps 2 through 7 until all price groups have been defined.

Assigning the Menu Item Price Groups and Price Tiers

With the pricing structure defined, each menu item is assigned to a price group and its corresponding price tier(s). Menu item prices are assigned to each of the price tiers listed. At least one price tier is required.

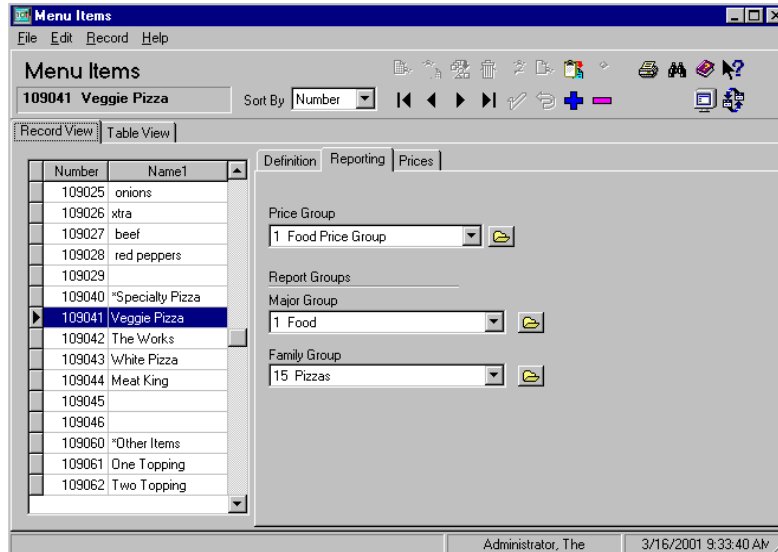
Follow these steps to configure the menu items prices and price tiers:

1. From the POS Configurator, select **Sales | Menu Items**. The Select Default Effective Dates form is displayed. Using a default date range will eliminate the need to specify effectivity dates for each new menu item price. Choose one of the following paths to continue:
 - ◆ To use an existing date range, highlight one from the table and click **OK**. Proceed to Step 6.
 - ◆ To create a new date range, click  and go to Step 2.
 - ◆ To skip this step, click **No Default** and then proceed to Step 6.



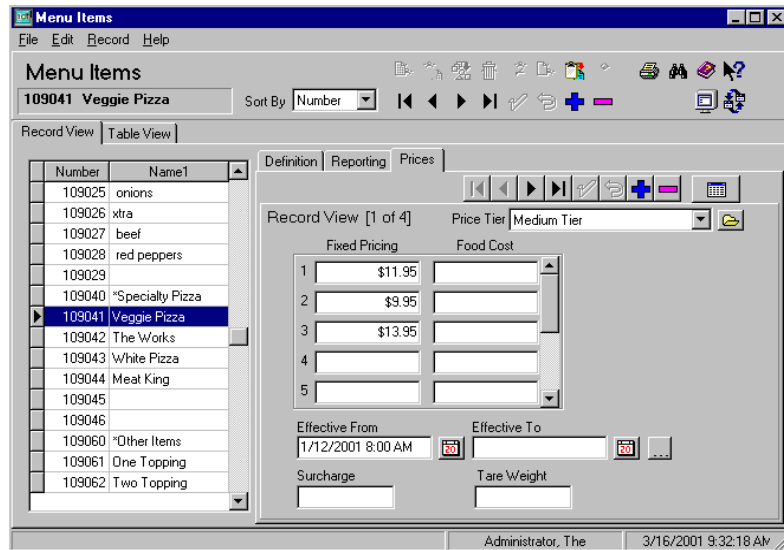
2. (Optional) Enter a **Name** for the effectivity period (e.g., Initial Setup for Central Database).
3. (Optional) In the **Effective From** column, enter the first date that these menu item prices will be active.
4. (Optional) In the **Effective To** column, enter the last date that these menu item prices will be active.

- (Optional) Click **OK** to save the record. The Menu Item form is displayed.
- Select a menu item from the table.



- Go to the **Reporting** tab.
- Select a **Price Group** for this menu item from the drop-down list. When a menu item is assigned to a price group, a record is automatically created for every price tier in that price group.

9. Go to the **Prices** tab.




10. Choose a **Price Tier** from the drop-down list.

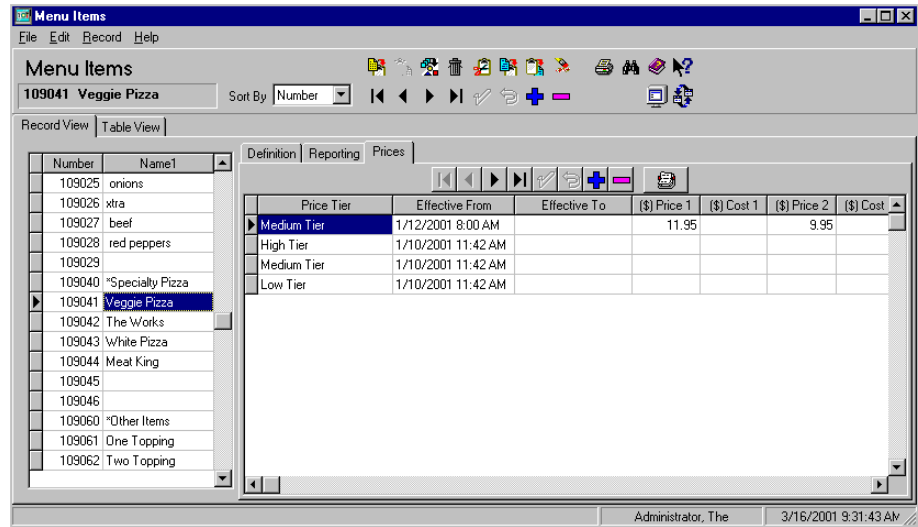
11. (Optional) In the **Effective From** and **Effective To** fields, enter the date range when the menu item price(s) will be active. If a default date range was selected in Step 2, the effectivity dates will be populated automatically.


Note *These fields may be edited without affecting the default effectivity date range record. If no date range is specified, the start date defaults to the current system date, while the end date is unspecified.*

12. Enter the price(s) for this price tier.

13. Click  to save the record.

14. (Optional) To select another price tier with the same name but different effectivity dates, switch to table view by clicking the  icon.



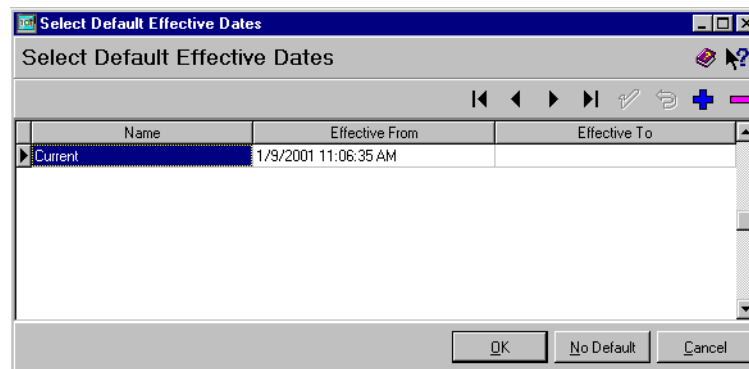
15. Using the **Price** tab's navigation bar, click  to add another price tier to the table. A blank record is inserted at the bottom.
16. Double-click in the **Price Tier** column to open the drop-down list and select a price tier. If a default effectivity date range was selected, the dates will be automatically populated. Revise as needed.
17. Repeat Steps 6 through 16 until all the menu items have been configured.

Assigning Price Tiers to Stores

After the menu items are configured, the price tiers are assigned for each of the enterprise stores. Remember, price tier assignments control which set of menu item prices will be active at any given time.

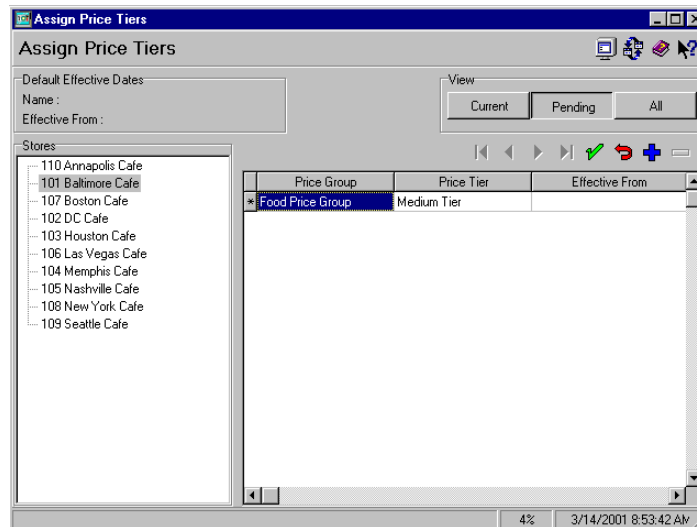
Follow these steps to assign price tiers:

1. Open the POS Configurator and select **Enterprise | Price Tiers**. The Select Default Effectivity Dates form is displayed. Using a default date range will eliminate the need to specify effectivity dates for each new price tier assignment. Choose one of the following paths to continue:
 - ◆ To use an existing date range, highlight one from the table and click **OK**. Proceed to Step 6.
 - ◆ To create a new date range, click **+** and go to Step 2.
 - ◆ To skip this step, click **No Default** and then proceed to Step 6.




2. (Optional) Enter a **Name** for the effectivity period (e.g., Initial Setup for Central Database).
3. (Optional) In the **Effective From** column, enter the first date that the menu item prices associated with this price tier will be active.
4. (Optional) In the **Effective To** column, enter the last date that the menu item prices associated with this price tier will be active.

- (Optional) Click **OK** to save the record. The Assign Price Tiers form is displayed.
- Select a store from the list box.

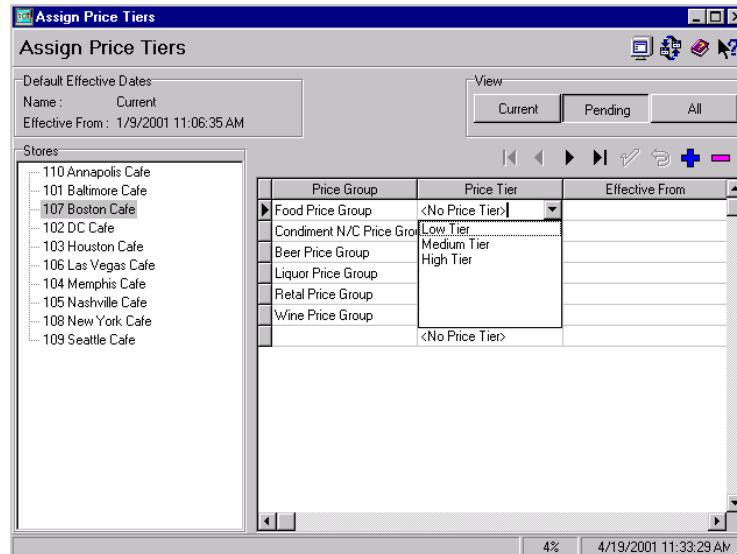


- Refer to the **View** buttons in the upper right-hand corner of the screen. These buttons provide three sets of price tier data for each store listed. The options are:
 - ◆ **Current**—Displays the active price tier assignments for the selected store. This view is read-only.
 - ◆ **Pending**—Displays any price tiers assigned to the selected store whose effective start date is greater than the current date. Price tiers in this view may be added, modified, or deleted from the store assignments.
 - ◆ **All**—Displays all of the price tiers (past, present, or future) assigned to the selected store. This is a read-only view.

To assign price tiers, click **Pending**.


- Click  to add a new price tier record to the table.

9. Double-click in the **Price Group** column to open the drop-down list. Select a price group.
10. Double-click in the **Price Tier** column to open the drop-down list. Select a price tier.



11. Enter the effectivity date(s) for this price tier. If a default date range was selected, entries will be automatically posted in the **Effective From** and **Effective To** columns. These dates may be modified, if needed.

Note *Editing these fields will not affect the pre-defined default effectivity date range record. If no date range is specified, the start date defaults to the current system date, while the end date is unspecified.*

12. Click  to save the record.
13. Repeat Steps 6 through 12 until the appropriate number of price tiers have been assigned to all of the stores.

Implementing Other EM Changes

In addition to pricing information, other changes may need to be implemented to accommodate setup of the corporate EM database. Modifications will vary, depending on store preferences and on which of the RES 3000 back office applications (if any) are installed on the system.

The following table provides a checklist of potential changes:

Form	Activity
POS Configurator System Restaurant	This form is used to configure each of the enterprise stores. Review the Descriptions, Business Settings, Currency, Options, Taxes, and NLU Group tabs to ensure that the options are appropriately set.
POS Configurator Devices Touchscreen Designer	Touchscreen layouts may vary from store to store. Review the enterprise requirements and, using the touchscreen version option, define the basic touchscreen and create a suitable number of variations for implementation in the enterprise stores. For more information on this process, refer to the section <i>Creating Touchscreen Versions</i> beginning on page 58.
POS Configurator Enterprise Assign Touchscreens	If the enterprise is using variations of a default touchscreen, the touchscreens are assigned on a store-by-store basis. Instructions for <i>Assigning Touchscreen Versions to Stores</i> begin on page 62.
POS Configurator Employees Jobs <i>or</i> LM Time and Attendance Jobs	Jobs and default pay rates may vary from store to store. Review the enterprise requirements and create a suitable number of variations for implementation in the enterprise stores. For more information on this process, refer to the section <i>Managing Jobs and Default Pay Rates</i> beginning on page 63.

Form	Activity
POS Configurator Employees Time and Attendance <i>or</i> LM Time and Attendance Time and Attendance	This form is used to configure the time and attendance options for each of the enterprise stores. Review the General, Time Clock Schedule, Breaks, Staff Requirements, and Payroll tabs to ensure that the options are appropriately set.
LM General LM Parameters	This form is used to configure the LM parameters for each enterprise store. Review the General and User-Defined tabs to ensure that the options are appropriately set.
PM Setup PM Parameters	This application does not automatically assign a default base currency. To prevent an error message, a base currency must be selected for the Corporate office and each store.
	This form is used to configure the PM Parameters for each enterprise store. With the EM 3.1 release, it will be managed from the EM corporate site. When converting the corporate database from EM 3.0 to v3.1, the system will copy the existing (corporate) record in <i>PM Parameters</i> and create a duplicate record for each of the stores. These store records must be individually configured before the next deployment package is sent. Failure to do so will result in an overwrite of the store's current settings.

Creating Touchscreen Versions


Touchscreen requirements often vary between stores. EM manages touchscreen configuration by allowing the corporate office to set up a basic layout that includes all of the commonly used hard-coded keys and functions. This layout becomes the default touchscreen version (TSV).

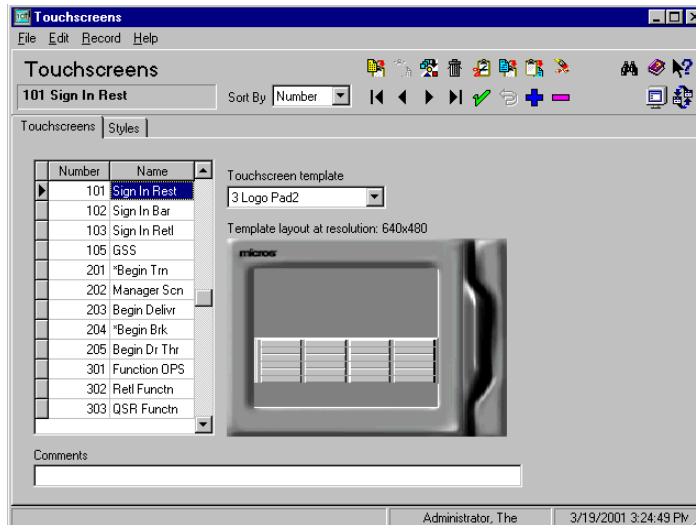
To customize the layout for a particular store, the administrator simply creates an alternate TSV based on the default. The administrator then modifies the keys (within prescribed rules), and implements this variation in place of the default. These modified layouts are referred to as override TSVs.

Example

The Cap'n Mike's restaurant chain offers locally brewed beers in each of its stores. To accommodate local varieties, a Fast Transaction default touchscreen is generated with 6 hard-coded keys. An override touchscreen version is then created for each store which substitutes local beers in place of the hard-coded keys.

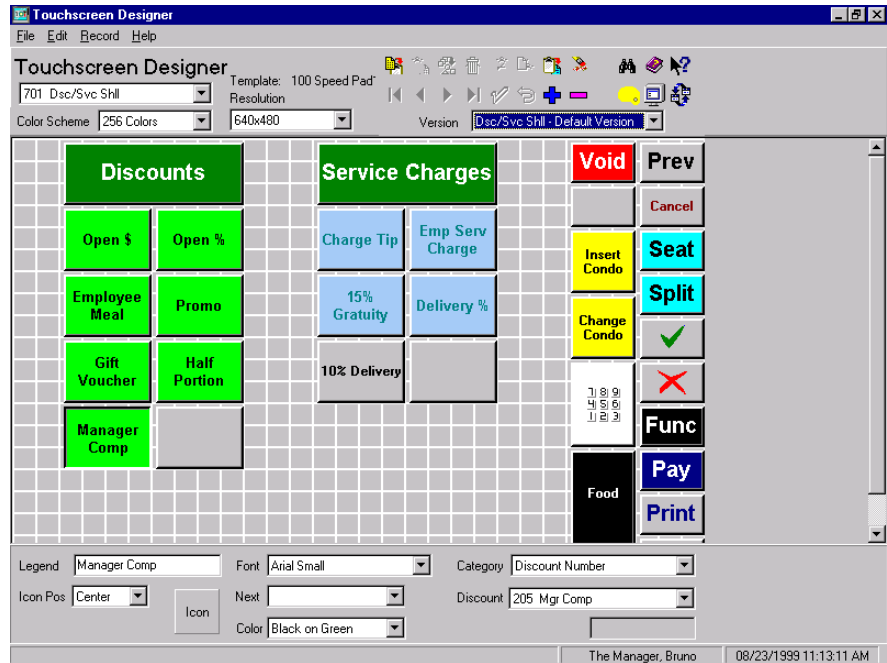
Follow these steps to create touchscreen variations:

1. Open the POS Configurator and select **Devices | Touchscreens**.
2. Click  to add a new touchscreen record.





3. On the **Touchscreens** tab, enter a **Number** and **Name** for this new touchscreen. This record will become the default TSV.
4. Select the rest of the touchscreen options, as needed. For more information on this process, refer to the 3700 Feature Reference manual.
5. Close the Touchscreens form and select **Devices | Touchscreen Designer**.

- From the drop-down list, select a touchscreen. Notice that the same touchscreen name is displayed in the **Version** field.



- Configure the Default touchscreen.


- Click the  icon. The Touchscreen Version form is displayed.

- Click  to add another record. Enter a name for this touchscreen version.

- Select the touchscreen version that requires updating.

- Click **OK** to close this screen and return to the Touchscreen Designer form.



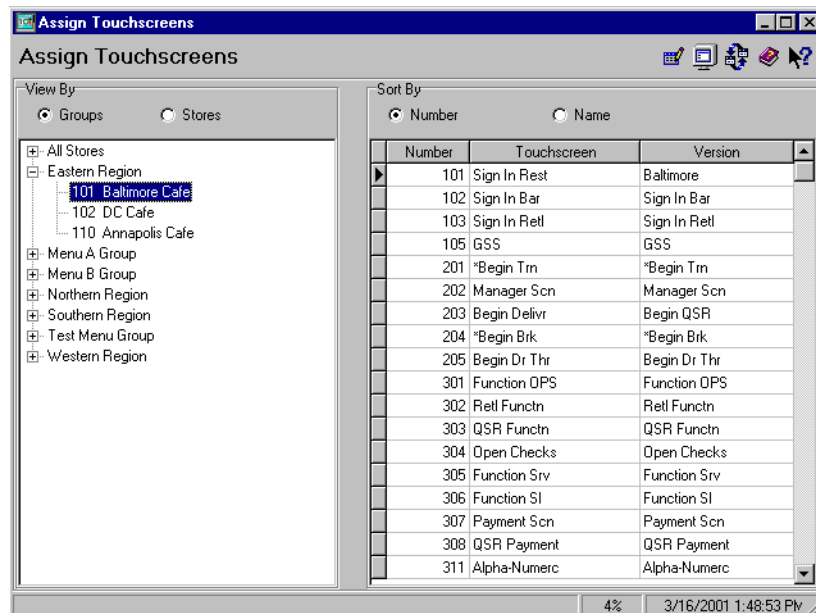
12. Using the basic layout, modify the keys (attributes and/or functions) to create a store-specific or store-group version.
13. From the **Version** drop-down list, select the appropriate name for this override TSV.
14. Click  to save the record.
15. Repeat Steps 12 through 15 until all of the variations have been defined.

Assigning Touchscreen Versions to Stores

Once the touchscreen versions are defined, they should be linked to the appropriate stores.

Follow these steps to assign the touchscreen versions:

1. Open the POS Configurator and select **Enterprise | Assign Touchscreens**. The Assign Touchscreens form is displayed.



2. In the **View By** panel, select a radio button to determine how the stores will be displayed. The options are:
 - ◆ Groups
 - ◆ Stores
3. Select a store or store group from the panel. The list of all the default touchscreens is displayed on the right.
4. To change the default TSV, select a touchscreen and double-click on the **Version** name. A drop-down list of options is displayed. Select the appropriate entry.

5. Repeat until all of the appropriate touchscreen versions have been assigned to the appropriate store.
6. Select another store and repeat Steps 4 and 5 until all of the stores have been configured.

Managing Jobs and Default Pay Rates

EM now allows the corporate office to vary the job definitions and default pay rates used in its enterprise-managed stores. Previously, any options that were globally managed could not be varied at the store level. This made it difficult for the corporate administrator to implement pay rate changes as mandated by federal or local laws.

To support customized default pay rates, the process has been divided into four parts:

- ◆ Configuring Jobs
- ◆ Defining a Section
- ◆ Assigning Hourly Jobs to a Section
- ◆ Subscribing the Sections

The remainder of this topic provides background information on the individual processes, and includes step-by-step instructions for setting up and controlling the store configurations.

Configuring Jobs

The first step in managing wages is to define all of the jobs that are held throughout the enterprise.

Follow these steps to create a list of jobs:


1. From the Windows Start Menu, select **Programs | MICROS Applications | Enterprise Office | Labor Management** *or* **Programs | MICROS Applications | POS | POS Configurator**. The MICROS Security log screen is displayed.
2. Enter your employee ID and click **OK** to launch the application.

3. From the Labor Management Setup screen, click **Time and Attendance** and select **Jobs** from the popup menu.
or
From the POS Configurator, select **Employees | Jobs**.
The Jobs form is displayed.


Number	Name
1	Cashier
2	Cook
3	Prep
4	Delivery
5	Shift MGR
6	Management
7	Cashier/Cook

Job category: [dropdown]
Overriding employee class: [Cashier]
Revenue center: [Counter]
Labor category: [FOH]
Clock-in privilege: [1]
Job color: [dropdown]
Minimum age: [text input]

Declare direct tips on clock out
 Declare indirect tips on clock out
 Allow early or late clock out
 Print tips declared on clock out
 Tipped

4. Click  to add another record.
5. Enter the **Name** of the job.
6. Select the **General** tab and complete the form, as required.
7. Select the **Type** tab and complete the form, as required.

Note *It is not within the scope of this document to provide detailed instructions for defining jobs. This process is fully documented in the Labor Management Feature Reference Manual, included with the RES 3000 software.*

8. Click  to save the record.

Defining a Section

Because hourly wages are subject to state and local regulations, corporate administrators need to create a separate set (or section) of default pay rates that reflect these regional differences.

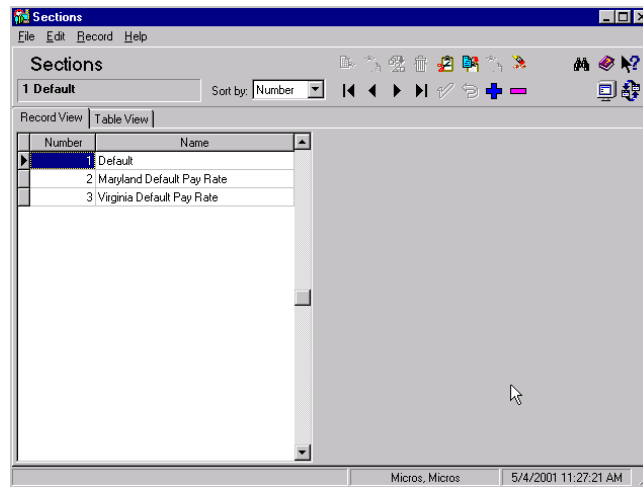
It is not necessary to define sections for every store or group of stores in the enterprise. A default section is automatically created and can be used by the enterprise, if the pay rates are the same in each store.


***Note** Sections are only applicable to Hourly jobs. Salaried and Non-Clock jobs are subscribed to separately through the EM MECU.*

Follow these steps to define a new section:

1. From the Windows Start Menu, select **Programs | MICROS Applications | Enterprise Office | Labor Management** *or* **Programs | MICROS Applications | POS | POS Configurator**. The MICROS Security log screen is displayed.
2. Enter your employee ID and click **OK** to launch the application.
3. From the Labor Management Setup screen, click **Time and Attendance** and select **Sections** from the popup menu.
or
From the POS Configurator, select **Employees | Sections**.

4. Click  to add another record.



5. Enter a name for this section, taking care to be as specific as possible (e.g., Baltimore Default Pay Rates, New York Default Pay Rates, etc.). Doing so now will make it easier to locate the right section as new stores are added or changes need to be implemented.
6. Click  to save the record.

Assigning Hourly Jobs to a Section

Once the labor sections are added, the next step is to assign a section to each hourly job defined in the system. **This is a critical part of setup.**

For the process to work correctly, the following rules must be observed:

- ◆ **A Default Regular Rate must be assigned to every hourly job for every Section listed.** Suppose, for example, that the list of hourly jobs includes cashiers, cooks, servers, busboys, and delivery. Each time a new section is defined (e.g., *Maryland Pay Rates*, *Boston Pay Rates*, etc.), the pay rates for every job on the list must be added to that section.

- ♦ **At each store, only one Section may be active at a time.** When an enterprise-managed store subscribes to a Section, it automatically receives all the hourly jobs associated with that section. If, for example, the hourly jobs assigned to the subscribed section includes cashiers, cooks, and servers, then any store subscribing to *Maryland Pay Rates* (e.g., the Baltimore, Annapolis, and Rockville stores), will automatically receive those jobs and their associated pay rates.

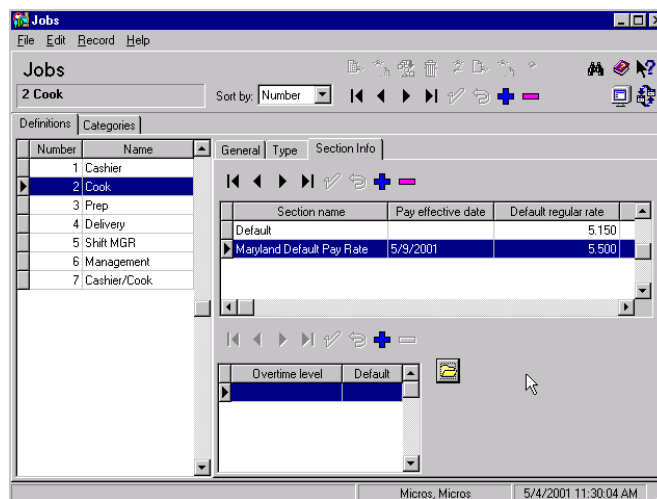
Note *In order for an hourly job to be deployed to a store, that job must be assigned to a section.*

Follow these steps to configure the default pay rates:

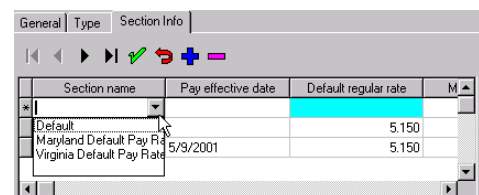
1. From the Windows Start Menu, select **Programs | MICROS Applications | Enterprise Office | Labor Management** *or* **Programs | MICROS Applications | POS | POS Configurator**. The MICROS Security log screen is displayed.
2. Enter your employee ID and click **OK** to launch the application.
3. From the Labor Management Setup screen, click **Time and Attendance** and select **Jobs** from the popup menu to open the Jobs form.

or

From the POS Configurator, select **Employees | Jobs** to open the Jobs form.



4. From the **Definitions** table, highlight a job.
5. Go to the **Section Info** tab and click **+** above it to add another record.
6. For the blank record, click in the **Section name** field to open a drop-down list of the previously defined sections. Select one.



7. Complete the rest of the table entries as follows:

- ◆ **Pay effective date**—Specifies when the default pay rate will take effect. If no date is specified, the system assumes that the rate is active.


Note *The Pay effective field did not exist in RES version 2.5 or 2.6. If this date is set and deployed to a 2.5 or 2.6 site, the system will ignore the setting and implement the pay changes immediately.*

- ◆ **Default regular rate**—Specifies the default pay rate for all employees in this job during a normal working day. This field is required.
- ◆ **Min regular rate**—Indicates the lowest rate that an employee with this job may be paid during a normal working day. (Optional)
- ◆ **Max regular rate**—Indicates the highest rate that an employee with this job may be paid during a normal working day. (Optional)

Note *Max regular rate must be set in order to use override rates in Employee setup.*

- ◆ **Max overtime rate**—Indicates the highest rate than an employee with this job may be paid for working overtime. (Optional)
- ◆ **Minimum age**—Specifies the minimum age required for any employee working in this job. (Optional)

8. Repeat Steps 4-7 until sections have been added for **all** of the hourly jobs listed.

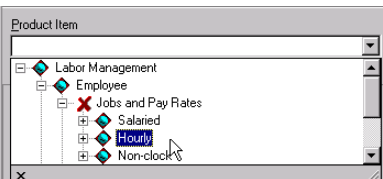
9. Click  to save the data.

Note *If the store wants the ability to modify any of the pay rate fields, the user column translation file (usr_coltrans.txt) must be configured so that these fields will retain their current value the next time deployment files are received. To do this, the file must set these values equal to '*'.*

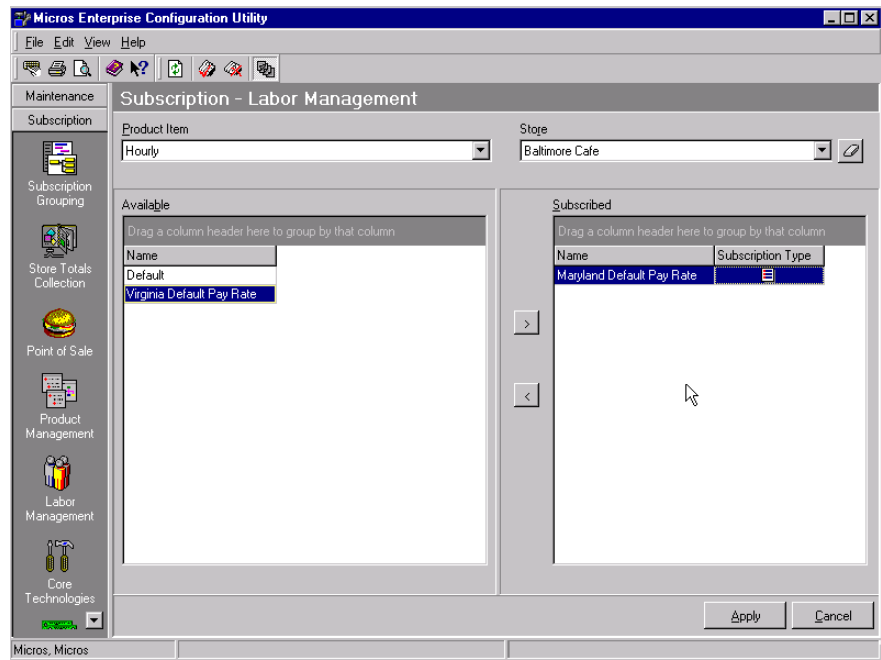
Subscribing the Stores

To ensure that each enterprise-managed store receives the correct default pay rates, the corporate administrator must now set up the appropriate labor management subscriptions.

Follow these steps to configure sections (and by extension, default pay rates):

1. From the Windows Start Menu, select **Programs | MICROS Applications | Enterprise Management**. The MICROS Security log screen is displayed.
2. Enter your employee ID and click **OK** to launch the MECU.
3. Click the **Subscription** button on the feature selection panel to reposition the slide bar and display the available functions.
4. Select the **Labor Management** option to open the appropriate subscription form.
5. From the **Product Item** drop-down list, expand the drop-down directory through the **Labor Management | Employee | Job and Pay Rates** node and double-click on **Hourly**. The **Available** panel will be populated with a list of sections.
6. From the **Store** drop-down list, expand the **Store** node and double-click on one of the entries.

7. From the **Available** panel, highlight the appropriate section for the selected store and click the [>] button or drag and drop it in the **Subscribed** panel.



Note *A store may subscribe to only one Section at a time. If more than one is subscribed, an error message will be displayed.*

8. Repeat Steps 6 and 7 until all of the stores have been configured.
9. Click **Apply** to save the records.

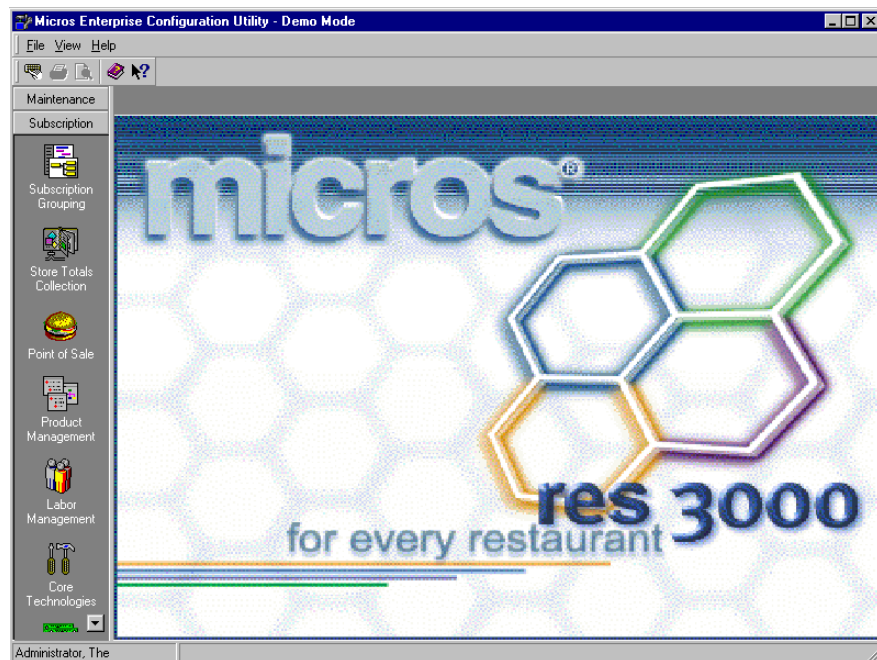
Setting Up Subscriptions by Product

After the central database is established, the corporate administrator sets up the store subscriptions to determine which configuration options will be deployed to the enterprise stores.


Subscriptions are managed from the product level (i.e., Point-of-Sale, Product Management, Labor Management, Core Technologies, and Financial Management). Once a product is selected, the user specifies which items will be available at which stores. Product items may be assigned to individual stores or store groups.

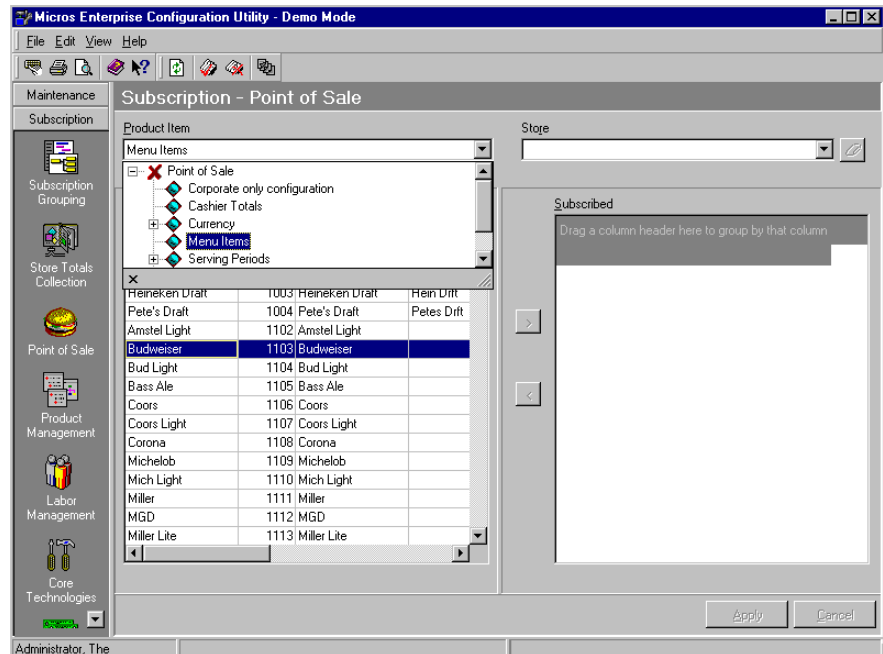
Follow these steps to set up the subscriptions:


1. Open the Micros Enterprise Configuration Utility (MECU) and select the **Subscription** button from the feature selection panel on the left. The slide bar repositions to display the available functions.



2. Select a product icon from the subscription panel on the left. A Subscription form for the selected product is displayed.

3. Open the **Product Item** drop-down list by clicking the  button on the right side of the field. Double-click to select a product item and populate the **Available** pane.



4. Open the **Store** drop-down list by clicking the  button on the right side of the field. Expand the list to locate the appropriate store and double-click to make a selection. All of the product items in the **Available** pane that the store subscribes to are moved to the **Subscribed** pane for the selected store(s).
5. Highlight one or more items and use the left/right arrows to move product items between the panes until all of the required items (and only those required) are listed in the **Subscribed** pane.

Warning!

When subscribing to a menu item with required condiments, the system will not automatically include those condiment menu items as part of the subscription. You must subscribe to all related condiment items separately. Failure to do so will result in an error message when the menu item is ordered during store operations.

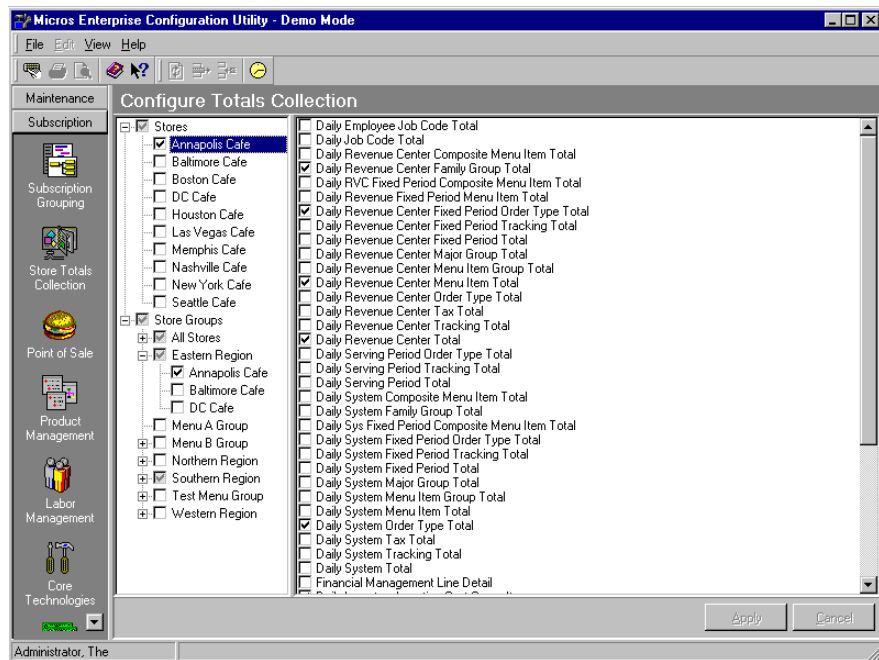
6. Click **Apply** to save the record.
7. Repeat Steps 3 through 6 until all of the product items have been assigned to the appropriate stores.
8. To setup subscriptions for another product, return to Step 3 and repeat the process.

Configuring Totals Collection

The final step in setting up the corporate EM database is to define which totals will be collected for each of the enterprise-managed stores and how long the information will be retained. These totals populate the system reports and are used to analyze productivity in the stores and throughout the enterprise.

Follow these steps to configure totals:

1. Open the Micros Enterprise Configuration Utility (MECU) and select the **Subscription** button from the feature selection panel on the left. The slide bar repositions to display the available functions.
2. Select the Store Totals Collection icon from the subscription panel on the left. The Configure Totals Collection form is displayed on the right panel.




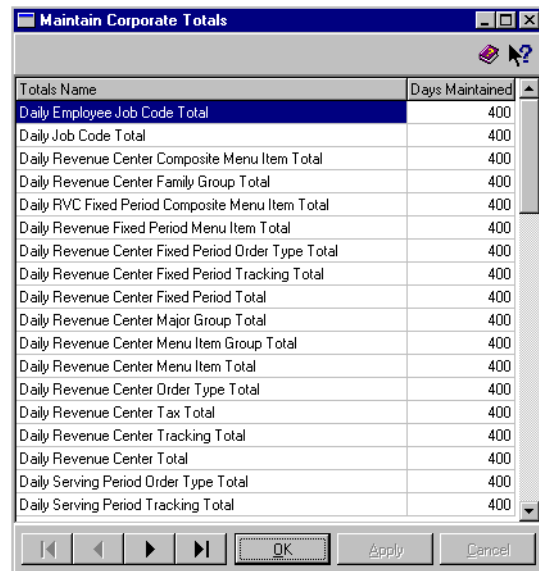
3. Expand the tree to locate the appropriate store(s) and check the boxes next to them to indicate a selection.
4. Place a check mark in the box(es) next to each store total to be retrieved for the specified store or store group.

- Click **Apply** to save the record.

Note *A warning message may be received if the total checked is not maintained by Corporate (i.e., Employees) or if the total type that is being selected has not been subscribed to that store(s). For example, any totals collection that calls for Tracking Groups cannot be received if they are not subscribed.*

- Repeat Steps 3 through 5 until all of the totals have been selected for each store. Once the totals are selected, go to Step 7 to set the archive period for each of the totals collected.

- Click the  icon in the navigation bar at the top of the MECU. The Maintain Corporate Totals form is displayed.



Totals Name	Days Maintained
Daily Employee Job Code Total	400
Daily Job Code Total	400
Daily Revenue Center Composite Menu Item Total	400
Daily Revenue Center Family Group Total	400
Daily RVC Fixed Period Composite Menu Item Total	400
Daily Revenue Fixed Period Menu Item Total	400
Daily Revenue Center Fixed Period Order Type Total	400
Daily Revenue Center Fixed Period Tracking Total	400
Daily Revenue Center Fixed Period Total	400
Daily Revenue Center Major Group Total	400
Daily Revenue Center Menu Item Group Total	400
Daily Revenue Center Menu Item Total	400
Daily Revenue Center Order Type Total	400
Daily Revenue Center Tax Total	400
Daily Revenue Center Tracking Total	400
Daily Revenue Center Total	400
Daily Serving Period Order Type Total	400
Daily Serving Period Tracking Total	400

- Select a **Total** from the list. By default, the system maintains the data for 400 days. Edit the Days Maintained field, as required.
- Click **Apply** to update the record.

- When finished, click **OK** or **Cancel** to exit the screen.