

# MacromatiX Release

2024.2

Released April 2024

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## Introduction

This document communicates the major new features and changes in the 2024.2 MacromatiX Release. It also references issues that were addressed during this release. MacromatiX is a cloud-based operating system that provides operational efficiency, cost controls and real-time visibility into restaurant operations that keep the manager in front of customers and focused on their experience, rather than stuck in the back office staring at spreadsheets. Get instant insight into inventory and financials with in-depth, down-to-the item reporting. Gain access to sales data, gross profit, cost of goods sold, loss prevention and exception management with the ability to report down the item level at individual stores. With MacromatiX, food is fresher, waste is reduced, and gross profits are increased.

## About This Release

The 2024.1 release includes substantive changes to improve the MacromatiX user experience. A few of the release highlights for MacromatiX Desktop and MxConnect (Mobile) are detailed below

### Release Highlights

- ★ Accept New and Updated User Data from CUP and FAS
- ★ MX Next Gen Forecasting - E2E testing
- ★ MX - Near Real Time - Data Transfer - Production Items and Actual Sales
- ★ Implement Operational Reporting in MxConnect

Desktop (MMS)		
	Features	Defects
Core	12	2
Financial		
Forecasting		
Inventory		
Production		
Reporting		
Workforce		
<b>Total</b>	<b>12</b>	<b>2</b>

Mobile (MxConnect)		
	Features	Defects
Core	10	20
Financial		
Forecasting		
Inventory		
Production		
Reporting		
Workforce		
<b>Total</b>	<b>10</b>	<b>20</b>

Additional Applications	
	Features
CloudLink	3
LiveLink	
RDS	1
Server Manager	
<b>Total</b>	<b>4</b>

# MacromatiX Desktop (MMS)

## Core

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### Accept New and Updated User Data from CUP and FAS [F23487]

Release Version	Change Type	Module(s)
<u>2024.2 Release</u>	<u>New feature</u>	<u>Core</u>

### Summary

#### Centralized User Profile Management:

- To facilitate provisioning, updating, and termination of MacromatiX users through a centralized service (CUPS).
- Ensuring proper linking of SSO users and accurate assignment of permissions based on centrally defined profiles in CUPS.

#### Automated User Access Management:

- Enabling automatic synchronization of user access and permissions across Fourth products based on centrally defined user profiles.
- Streamlining user access provisioning and termination processes to align with their roles, enhancing operational efficiency.

#### New messages handled:

- **UserProfilesUpdated** (CUP → MacromatiX)
  - If Systems contain MacromatiX and the user exists → user's data, security groups and store assignments are updated in MX
  - If Systems contain MacromatiX and the user does not exist → a new user is created in MX, along with security groups and store assignments
  - If Systems does not contain MacromatiX, but the user exists → its security groups and multi store assignments are deleted in MX. This means all entries from tbGroupUser are removed and all entries from tbEntityUser are removed except the IsDefault/Home Store.
  - The **Store number** in the employee import is set based on **MainLocationCanonicalId** from the message. With the **MainLocationCanonicalId** the store number is retrieved from database by **FourthLocationID**.

- **AssignAccountApplications** (MacromatiX → FAS) - Sent when user's status has changed in Macromatix and the user has Fourth Account ID. If the user has been terminated, the permission set ids value as per Macromatix Configuration Manager is put in the list of ApplicationsToRemove in the message. If the user has been re-activated, the same permission set ids is put in the list of ApplicationsToAdd
- **UpdateAccountBrief** (MacromatiX → FAS) - Sent when user's data is modified in MacromatiX and the user has Fourth Account ID
- **AccountUpdateFailed** (FAS → MacromatiX) - Sent by FAS in response of UpdateAccountBrief. Details are added to the MX audit log.
- **AccessLevelsUpdated** (MacromatiX → CUP) - Sent when any security group changes in MX.

## Components

Component	User Story
Get user's main store from MainLocationCanonicalId property when handling AccountCreated and AccountUpdated messages	US177193
Use Permission Sets rather than SourceSystemId FAS orchestration messages	US178836
Send UpdateAccountBrief message when employee data is updated in MacromatiX [5]	US180106
Get user's main store from MainLocationCanonicalId property when handling UserProfilesUpdated	US178210
[NEW] Match existing users when source is Orchestration message	US178101
Add automation tests for Employee Import - Part 2	US176947
[NEW] Handle AccountUpdateFailed message	US174024
[NEW] Send UpdateAccountBrief message when employee data is updated in MacromatiX	US179213
[NEW] Remove permissions from existing user when Mx is not in the list of permitted apps in UserProfileUpdated	US179214
[NEW] Match existing users when source is Employee Import	US174907

Component	User Story
Setup SSO on RNDQA2	US181269
QA - E2E testing - CUP and FAS flow	US174911

## MX Next Gen Forecasting - E2E testing (F23533)

Release Version	Change Type	Module(s)
<u>2024.2 Release</u>	<u>Enhancement</u>	<u>Forecasting</u>

### Summary

Test the implemented integration of MacromatiX with the AI Forecasting service:

1. To provide our customers with a more accurate forecast, which will require less manual intervention.
  - a. The legacy forecast within MacromatiX is often manually adjusted by restaurant managers to improve its accuracy.
  - b. Failure to provide a more robust forecasting solution gives our competitors an edge in this area.
  - c. Due to previous lack of investment in advanced forecasting directly within MacromatiX, some existing customers have opted to build/contract external forecasting solutions.
2. To enable customers using multiple Fourth products to utilize a consistent forecast within Inventory and Labor.
  - a. Eliminate the need for MacromatiX to share our forecast data with the other Fourth products using direct integrations.
  - b. Provide a cohesive experience to our customers and remove any confusion as to where/how to view and manage the forecast.
  - c. Enable Fourth to focus investment on Demand Forecasting on a single solution instead of maintaining different forecasting solutions across the portfolio of products.
3. To improve performance, scalability, and parity with existing forecasting functionality in MacromatiX and HotSchedules.

## Components

Component	User Story
E2E testing - Execution part 1	US178539
Configure the server for the E2E testing	US175478
SPIKE/POC - Improve the setup for AI Forecasting	US179188
E2E testing - Execution part 2	US175480
Placeholder - Fix issues found during E2E Part 1	US175481
Investigate stores not polling + Monitor	US180032

## TECH: Fourth SSO - Azure B2C support (F22725)

Release Version	Change Type	Module(s)
<u>2024.2 Release</u>	<u>Enhancement</u>	<u>Core</u>

## Summary

Support the migration of the SSO provider from Salesforce to Azure B2C. The URL will be the address of the Macromatix SSO Login page, rather than the application itself.

## Components

Component	User Story
Patch back AssertionConsumerServiceURL changes to supported release versions	US174285
Rename Salesforce to Fourth SSO	US177619
Test the latest version with Azure B2C	US177490
Make AssertionConsumerServiceURL of the AuthNRequest from MxConnect to the identity provider configurable	US170415



Make AssertionConsumerServiceURL of the AuthNRequest from MMS to the identity provider configurable

US170409

# MacromatiX Mobile (MxConnect)

## Core

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### Implement Operational Reporting in MxConnect (F14468)

Release Version	Change Type	Module(s)
<u>2024.2 Release</u>	<u>Enhancement</u>	<u>Reporting</u>

#### Summary

Implement new reports in the Report Selector in MxConnect.

#### Components

Component	User Story
Add report parameter type controls - ""GP Variance Report - Daily Count"" [5]	US176240
Add report parameter type controls - ""Stock Count WorkSheet Report"" [5]	US169800
SPIKE: Which report parameters we need to support	US169963

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### [MX] Mobile Cash and Workflow - Warranty (Q1 2024) (F23743)

Release Version	Change Type	Module(s)
<u>2024.2 Release</u>	<u>Enhancement</u>	<u>Mobile, Financial</u>

#### Summary

Fixing defects and filling gaps in Mobile Cash Management, Mobile Workflow

As part of our company's mobile strategy, the R&D team recently created the new cash management modules in the MacromatiX mobile solution. However, during the conversion process from the legacy <http://ASP.NET> pages to the mobile solution, a significant number of defects and gaps emerged between the existing functions in the MMS and the new functions in the mobile solution. As a result, it is currently not possible to release the new Mobile Cash features to both existing and new customers. To address these issues, the Shanghai team has been tasked with fixing the defects and filling the gaps in Q2 2023.

## Components

Component	User Story
In pinned mode, columns will misalign if switch menu and workflow tabs.	US176699
Workflow code clean up and optimization	US176486
[Defect] - Auto Notification - Override task in MMS workflow, task name is missing in notification.	US175516
[Defect] - Report Portal - Will not cache a new report if change format	US174686
[Defect] - Deposits & Banking - Pending tab can not display in full in Android pad portrait mode	US173311
[Defect] - Cash Recon - After authorize cash recon, checks still can be editable	US177846
[Defect] - Cash Recon When release cash reconciliation on mobile, mms's cash count still be authorized	US171646
[Defect] - Cash Recon -The negative sign and amount are displayed on separate lines instead of on the same line on financial subgroup	US176680
[Defect] - Daily Recon - shift's variance of daily recon is different from cash recon	US173773
[Defect] - Mobile Report - gaps of report between mobile and mms	US171412

## Server Manager

### Central Location Service - Validation and Error Handling (F22992)

Release Version	Change Type	Module(s)
<u>2024.2 Release</u>	<u>Enhancement</u>	<u>Core</u>

## Summary

When location data is imported into MacromatiX from the Central Location Service (CLS), any validation or processing errors should be reported back to the Central Location Service through messaging.

## Components

Component	User Story
Generate Messages on Validation Errors in CLS Entity Processing	US172158
QA - CLS - E2E error handling testing with all teams	US177328
QA - CLS - E2E testing with all teams	US176254
Add more descriptive messages when CanonicalLocationStatusUpdated is triggered	US178211

## MX - Near Real Time - Data Transfer - Production Items (F23618)

Release Version	Change Type	Module(s)
<u>2024.2 Release</u>	<u>New Feature</u>	<u>Reporting</u>

## Summary

Generate and send messages for real time integration.

- NRT Message Types - Inventory
  - NRT Message Types - Inventory - Items Near Stock Out
  - NRT Message Types - Inventory - Items Misaligned Preparation, Production and Thaw Times
  - NRT Message Types - Inventory - Insufficient Production Item
  - NRT Message Types - Inventory - Expired Production Batches
- NRT Message Types - Sales
  - NRT Message Types - Sales - Sales Summary
  - NRT Message Type Sales Production Actual vs. Forecasted Misalignment

## Components

Component	User Story
Add NRT item configurations for production items	US175813
Generate Export of Insufficient Production Items On-Hand (TBC)	US178084
Generate Export of Production Forecast vs Actual Trend Misalignment (TBC)	US178085
Generate Export of Expired Production Batches (TBC)	US178089
Testing and support NRT team	US178397
Items Near Stock Out message send only for NRT zone	US178037
E2E testing for NRT messages	US178492
Add Production Unit in Expired Production Batches message	US180016

## Configuration Settings

- 2 new configs on Configuration Manager - input fields for number

These configs will be applicable for the items that are configured for production. That means all the items that are included in a MPC item template(list of production items assigned to a zone) and are displayed on MMS\_HO\_ProductionManager.aspx or ProductionDashboard.

### **Actual Sales Over Forecast Trend Thresholds** - percentage of sale over forecast

The forecast is showing that by 11 AM we are going to sell 10 pieces of chicken, but we actually have sold 20. It will then show that you have sold 20 and in brackets we will have the 100%. That should be a warning for them that they probably need to produce more then they planned.

### **Actual Sales Below Forecast Trend Thresholds** - percentage of sale below forecast

The forecast is showing that by 11 AM we are going to sell 10 pieces of chicken, but we actually have sold 5. It will then show that you have sold 5 and in brackets we will have the -50%.

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## MX - Near Real Time - Data Transfer - Actual Sales (Aggregate) (F21057)

Release Version	Change Type	Module(s)

2024.2 Release

New Feature

Reporting

## Summary

Transfer Sales Activity point-in-time snapshots in near real-time using the Event Bus with extendable message structure.

## Components

Component	User Story
Generate Export via service method of Actual Sales Activity	US177607
Testing - Inventory KPI - Items Near Stock Out - Create logic for sending Items near stock out	US177606
E2E testing for NRT messages - Sales summary	US180957

## RDS

### Include Master Tables for Enterprise Order in RDS (F23977)

Release Version	Change Type	Module(s)
<u>2024.2 Release</u>	<u>Enhancement</u>	<u>Inventory</u>

#### Summary

HJ will be upgrading MMX version 2023.04 which include mutli-oder/enterprise order module . The orders for enterprise order should automatically fall into RDS tables, but the master table for Enterprise order is not in RDS. Include Master Tables for Enterprise Order in RDS:

- tbEnterpriseOrderStatus
- tbTransactionEnterpriseOrder
- tbTransactionEnterpriseOrderDetail
- tbTransactionEnterpriseOrderSupplyOrder

#### Components

Component	User Story
Include Master Tables for Enterprise Order in RDS	US178233

## 2024.2 Release Bug Fixes and Rapid Response/DTZ

### Mobile (MxConnect)

- Cash Reconciliation - Input fields not disabled on Count step after submission (D92249)
- Mobile Menu does not show. (D92279)
- SSO Login Overflow after adding Welcome Message and Typo in ng-template (D92389)
- Cash Recon Register Number always show 0 for Closed/Authorized record (D92392)
- Count item data is different when enter page from menu and reload count page (D92544)
- Count grid view display issue (D92545)
- Change error to warning for receive unit (D92735)

- Daily recon page load data error (D93801)