MacromatiX Release

2024.4

Released October 2024

Table Of Contents

Introduction

This document communicates the major new features and changes in the 2024.4 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 2024.4 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

- ★ Consume Adjusted Forecasts from CFM into MX [F21564]

- ★ AI Forecasting - Beta Setup [F24727]

- ★ Cost of Goods Sold Report in MxConnect - Store-Level - Expanded Details View [F24773]

- ❀ 62 Defects Resolved

Desktop (MMS)		
	Features	**Defects**
Core	4	62
Financial		
Forecasting		
Inventory		
Production		
Reporting		
Workforce		
Total	**4**	**62**

Mobile (MxConnect)		
	Features	**Defects**
Core	7	
Financial		
Forecasting		
Inventory		
Production		
Reporting		
Workforce		
Total	**7**	

Additional Applications	
	Features
CloudLink	2
LiveLink	1
RDS	
Server Manager	2
Total	**5**

MacromatiX Desktop (MMS)

AI Forecasting - Beta Setup [F24727]

Release Version	Change Type	Module(s)
2024.4 Release	New Feature	Core

Summary

After completing the integration for the AI forecasting we have identified and introduce some optimizations.

After that we are doing regression and performance testing on the dedicated prod performance testing environment.

When we receive the data back from the data lake to receive but not replace the data.

Optimizing the integration in time manner and support on setup clients.

Add hock adding any other minor optimization or other work.

Components

Component	User Story
Client data setup and configuration - Support (reest)	US185842
[Accepted] Regression testing on the performance environment for AI Forecasting - Documentation	US184398
[Accepted] Data setup and configuration - Initial setup	US184400
Data setup and configuration - imports setup/turn on them after confirmation	US186713

MacromatiX Mobile (MxConnect)

Cost of Goods Sold Report in MxConnect - Store-Level - Expanded Details View [F24773]

Release Version	Change Type	Module(s)
2024.4 Release	New feature	Core

Summary

Within the store-level view of the report, users should see the columns and Inventory Item Groups specified within the view manager.

- The user can expand the Item Groups to display the individual items within the group.
- The user can select an item to view expanded details about the item (similar to the ordering UI).
  - Any columns not already displayed in the view.
  - Last Counted Date/Time
  - Current On-Hand Quantity

The data in the Cost of Goods Sold Report aligns with:

- Item Usage Analysis Report (SSRS)
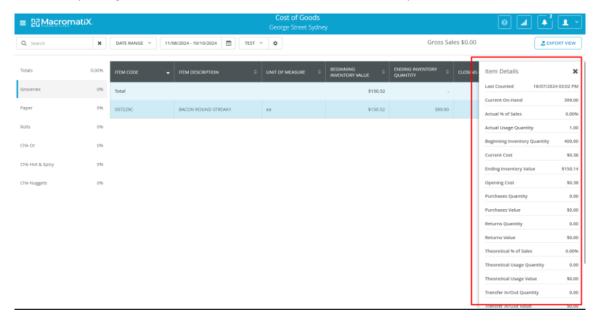- Inventory Movement (MxConnect Operational Reporting)

The details panel can be collapsed by:

- Clicking the 'X' in the panel
- Clicking the selected row again
- Clicking in white-space

Selecting a different item from the table will show the details for that item.

The table view should always include:

- Item Code
- Item Description
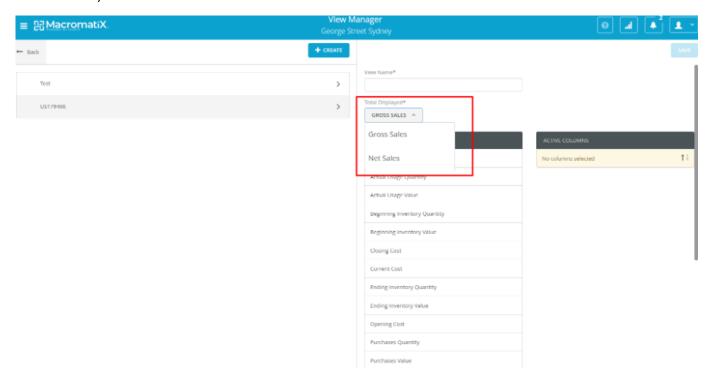- Reporting Unit of Measure (if defined, otherwise Inventory Unit)

The sales value used for "% of Sales" calculations should be displayed at the top of the report.

New dropdown is added to View Manager to provide the option to use "Gross Sales" or "Net Sales" (dropdown selection with default gross).

- Display the % at the left side next to the items group

- The Actual % of Sales and Theoretical % of Sales should be reflected based on what is chosen (Net or Gross)

Within the Item Details panel in the Cost of Goods Sold Report, a link is available to "Get Report"

Upon clicking the link, the "Item Usage Analysis Report" is generated in it's default format (PDF) and downloaded using the parameters selected within the Cost of Goods Report.

- Start Date

- End Date

- Selected Item

The details within the "Item Usage Analysis" report match the totals displayed in the Cost of Goods Sold Report.

Components

Component	User Story
Hyperlink to item usage analysis report	US188590
[QA] Verification of the data accuracy on initial report view and detailed view	US188586
MxConnect Report Portal - Date range limitation	US187780
Hyperlink to item usage analysis report	US189329
Cost of Goods Sold Report - Display Gross/Net sales	US189328
SPIKE: Optimization on performance on loading the report	US186885
[DEV] User can select an item to view expanded details about the item (similar to the ordering UI)	US179467
SPIKE: Support for Slide-Over/Collapsible Detail Panel	US181374
SPIKE - Add date range limitation for reports	US185688
[QA] Cost of Goods Sold Report - Display Gross/Net sales	US178404

Configuration Settings

- New permissions are added under the MMS_Admin_RoleSecurity.aspx page for Cost of Goods

Navigation Link to Connected Apps [F22188]

Release Version	Change Type	Module(s)
2024.4 Release	Enhancement	Core

Summary

Users with SSO through Fourth should be able to return to my "Connected Apps" portal (Engage) from within MxConnect link. The user do not have to manually open another window and log in again to access other Fourth products.

Components

Component	User Story
Add Configurable Link to "Connected Apps" Portal	US184359

VMI Enhancement - MxConnect [F25030]

Release Version	Change Type	Module(s)

2024.4 Release	Enhancement	Core

Summary

Implement VMI Order manual submission trough MxConnect.

When we import VMI order to be displayed in status "Place" instead of "Placed", so that the user is able to identify that the order is not submitted.

Treat VMI orders as Open when:

- Create Electronic Order is enabled <- for VMI orders this wouldn't be required as orders are created in a submitted & authorised state

- Update Electronic Order is disabled <- must be disabled to opt into this behavior, other updates are sent when quantities are edited

When submitted a VMI order that is treated as Open (which is already authorised):

- Set AllowUpdates = false

- Send Electronic Order

- Trigger standard purchase order export (XSLT Export driven?) * Not required for KFC UK as they use electronic orders

- Audit message

When cancelling a VMI order:

- Set AllowUpdates = false

Out of scope:

- Show the order as not submitted/not authorised (status remains Open - Authorised)

- Auto submit prior to cut off (order is already submitted & authorised)

- Implementing the same behavior for mobile

Components

Component	User Story
MxConnects - VMI Order displayed status	US187725
MxConnect - VMI Order manual submission	US185900

EMPC Intraday Adjustment & Printable Report [F23459]

Release Version	Change Type	Module(s)
2024.4 Release	Enhancement	Core

Summary

Introduced a new Production Adjustment page in the Mobile platform to enhance the management of MPC adjustments and reporting. This development aimed to ensure a consistent and user-friendly experience across both the Mobile and legacy MMS systems. Key changes included the addition of a new permission, "MPC - Production Adjustment - Can Access," which was initially disabled for all users but enabled for specific KFC Australia teams with existing permissions.

The new Production Adjustment page mirrors the legacy MMS Store Production page's functionality, allowing users to input adjustments and generate identical MPC reports on both platforms. It features a date selector, enabling users to modify the date for inputting adjustments and generating reports. The page includes two tabs: the MPC Adjustment tab for forecast projection adjustments and the PM Adjustment tab for afternoon forecast adjustments.

The MPC Adjustment tab was designed with a grid displaying relevant information, allowing users to input percentage adjustments for specific items. The PM Adjustment tab provided a time selector and grid for afternoon adjustments. The report generation functionality was enhanced, enabling users to select report types and formats, including a new SSRS Standard MPC report directly generated from the Mobile platform. Additionally, URL links were created for direct access to the adjustment tabs from workflow tasks, ensuring a smoother navigation experience for users.

Reason for the Change

The feature enhancement request seeks to integrate these essential functionalities into the Mobile platform, allowing team members to manage MP&C adjustments and reporting seamlessly within a single system. This change would eliminate the need to switch between the outdated MMS solution and the new Mobile solution, thereby improving efficiency. Additionally, the enhancement includes plans to optimize the page for better usability, making it more intuitive and easier to navigate, ensuring a smoother experience for users in managing MPC adjustments and E-MP&C processes.

Components

Component	User Story
A. Add new Production Adjustment page in Mobile.	US185556, US187056, US187528
Production Adjustment by Cook Interval	US188581

EMPC Charts Enhancement & New Printable Report [F24211]

Release Version	Change Type	Module(s)
2024.4 Release	Enhancement	Core

Summary

Several changes were made to the E-MP&C system and its associated MPC reports to enhance consistency, accuracy, and user experience. A new version of the histogram view was introduced to ensure that the presentation of quantities like Cooked, Sold, Forecast, and Waste was aggregated appropriately when users zoomed out. In contrast, Required and On Hand quantities remained unchanged across zoom levels. Additionally, the label for 'Required Qty' was updated to 'Required On Hand' for clarity. Persistence was added for user-selected legend preferences in the histogram view, ensuring preferences were maintained across sessions via local browser storage.

A Daily Total column was added to the table view within the Production Forecast Window to provide cumulative totals for various quantities like Cooked, Sold, and Forecast. This new column remained fixed while scrolling, simplifying navigation and enhancing usability. The legend was removed from the table view, and all data types were consistently presented numerically.

New versions of the MPC reports were created, including Morning, Afternoon, and Standard MPC reports. These reports were based on data sourced from the E-MP&C system to ensure alignment. Changes included reporting by both inventory and production units, rounding adjustments, and specific cook intervals. The reports were localized, could be generated in PDF or Excel, and were set as the default on the Production Adjustment page. The updates aimed to improve data consistency, usability, and user experience.

Reason for the Change

Aim to improve the consistency and accuracy of production management by aligning the calculations and display methods between their advanced E-MP&C system and legacy MPC reports. Store team members have encountered discrepancies in Required Quantities due to differences in calculation methods, units, and interval times between the two systems. Additionally, issues such as zoom-level inconsistencies and non-persistent legend preferences in the E-MP&C histogram view have created confusion and inefficiencies. To address these challenges.

Components

Component	User Story
A. Ensure consistency and accuracy in quantity presentation within the histogram view.	US185552

B. Persistence for user-selected legend preferences in the histogram view.	US185553
C. Add Daily Total Column in Table View.	US185554
D. New Versions of MPC Reports.	US185555,US187530
MPC-Production dashboard can't update HoldEndTime	US166394, US187668
MPC Issue Track	US187781

Additional Fields on the MXConnect User Setup [F24276]

Release Version	Change Type	Module(s)
2024.4 Release	Enhancement	Core

Summary

The MXConnect User Setup page was enhanced by incorporating essential fields and functionalities from the MMS Employee Management system. These changes reorganized employee-related fields into four distinct tabs: the Attributes Tab, User Tab, Security Groups Tab, and Multi Store Access Tab. New fields were added, such as Home Store, Employee Number, Payroll ID, Division, Department, Job Title, and address details. The Multi Store Access Tab was introduced specifically for store-level users, enabling easier management of user access across multiple locations.

In addition to these structural updates, event-driven functionalities were implemented. Whenever a new employee record was created or updated, system events like EmployeeRecordUpdated, StoreEmployeeUpdated, EmployeeMultiStoreRecordUpdated, and EmployeeExport were triggered, automating exports and other necessary tasks. These modifications improved the overall functionality and integration of MXConnect with other systems, streamlining employee management processes for KFC Australia.

Reason for the Change

Transitioning MacromatiX store-level users to MXConnect, replacing the older MMS system. However, the current MXConnect Edit User page lacks several critical fields and functionalities that are present on the MMS_System_Employees.aspx page. These missing elements include key information such as Title, Type, Birthday, Address, and contact details, along with important features like Home Store and Multi Store Access.

The absence of these fields hinders the completeness of employee data management within MXConnect, leading to their addition. Additionally, updating users on MXConnect must trigger an 'EmployeeMultiStoreRecordUpdated' event, which is essential for exporting user data to the NCR HR Bridge integration. This change ensures that the user export process remains seamless and supports event-driven functionalities in MXConnect for better alignment with KFC Australia's operational needs.

Components

Component	User Story
A. Addition Fields on the MXConnect User Setup Page	US185560, US188063

Food Processing Dashboard [F22527]

Release Version	Change Type	Module(s)
2024.4 Release	New feature	Core

Summary

The changes introduced significant enhancements to the food processing management system, focusing on configuration, optimization, and real-time control. A new configuration page was created, allowing users to manage food processing items for production, preparation, and thawing across different stores and zones. Key features included template management, where users could add, edit, or delete templates, configure item-specific settings like process times and forecast modes, and view changes through an audit log. Security permissions were enhanced to control access to the configuration page.

Optimization calculations for food production, preparation, and thawing were based on demand forecasts, lead times, and inventory levels. These processes ensured accurate production quantities, reduced waste, and improved efficiency. For production, the system adjusted quantities based on forecasted demand during specific intervals, while preparation considered shelf life and on-hand inventory for multi-interval tasks. Thawing schedules were aligned with forecasted needs, ensuring items were ready when needed, particularly for early morning shifts.

A new Food Process Dashboard was made available on the mobile platform, providing real-time visibility and control over the food processing workflow. The dashboard featured components like a date selector, filters, and a timer, along with tabs to view production, preparation, or thawing tasks. Users could interact with tasks through modals that allowed them to update quantities, confirm completions, log waste, and print labels. Technical updates included new data tables to store processing data, event-driven tasks to manage forecast changes, and a migration script to help existing systems transition smoothly into the new dashboard.

Reason for the Change

Numerous clients in the Quick Service Restaurant (QSR) and Limited-Service Restaurant (LSR) sectors, who use Fourth's solutions, require an intelligent system to optimize their food processing activities, including thawing, preparation, and production. The current tools, such as legacy Prep & Thaw reports in the MX Desktop application (MMS) and customer-specific reports in MX Connect, are limited in functionality and do not fully address the comprehensive needs of these processes.

To bridge this gap, there is a need for a more dynamic and efficient solution. The development of a comprehensive Food Processing Dashboard within the MX Mobile platform (MX Connect) aims to enhance restaurant operations by providing real-time, visual insights into thaw, prep, and production activities. This dashboard will suggest optimal quantities based on forecasted usage and shelf time, helping restaurants improve food freshness, reduce wait times, and minimize waste. By offering an interactive and accessible tool, the new dashboard will streamline food processing, ultimately benefiting both Fourth and its restaurant clients.

Components

Component	User Story

A. Centralized Configuration Page	US185892, US187061, US187529, US188580, US188064
B. Optimal Quantity Calculation	US185909, US187136, US187613
C. Food Process Dashboard - Task	US185911, US188065
C.1. Food Process Dashboard (Body)	US185912
C.2. Food Process Dashboard (Body)	US187923, US188579
D. FPD Creation Task	US185913, US188066
D. FPD Data Purging Task	US185915
D. FPD Reprocessing Task	US185914
D. Script to Migrate Configurations	US185916

Configuration Setting

- Added new permissions "Inventory_FoodProcess_Configuration_CanAccess" and "Inventory_FoodProcess_Configuration_CanEdit" for the new Food Process Configuration page. Only users with permission can access and modify food processing configurations.

- Added new permission "Inventory_FoodProcessing_CanAccess" for the new Food Process Dashboard page. Only users with permission can access the Food Process Dashboard page.

- Added Food Process Configuration MMS_HO_FoodProcessManager.aspx page.

Server Manager

Consume Adjusted Forecasts from CFM into MX [F21564]

Release Version	Change Type	Module(s)
2024.4 Release	New feature	Core

Summary

Forecast Import functionality is being enhanced to support importing adjusted forecasts from Central Forecast Management.

- Support forecast adjustments in Central Forecast Management.

- The Forecast Import configuration has been extended to flag a Forecast Import for importing adjusted forecasts from CFM.

- A new Forecast Import will need to be configured with Is Adjusted = true to import adjusted forecasts from CFM.

- In production we will have 1 forecast import configured to import forecasts from AIF (Is Adjusted = false) and 1 forecast import configured to import forecasts from CFM (Is Adjusted = true).

- Once we've imported an adjusted forecast from CFM, the forecast will be locked to indicate the ownership of the forecast is taken over by CFM.

- When importing forecasts from AIF, any days with locked forecasts will be skipped.

- When importing adjusted forecasts from CFM, locked forecasts will be overwritten.

Components

Component	User Story

End to End testing - CFM Transmit Adjustments	US180897
Lock Forecast - ForecastImportCreator - Skip Forecasts from AIF when Locked	US182327
Lock Forecast - Forecast Import	US187534
CFM - Consume ForecastGeneratedMessage adjusted forecasts	US187536

Configuration Settings

• Operations → Forecasting → Allow Forecast Import Override when enabled allows for overriding forecasts that have had manager adjustments in MX made. This setting needs to be enabled for stores using CFM as manager adjustments should be made in Central Forecast Management (CFM).

Cloudlink

Simphony Integration - Enhancements [F24796]

Release Version	Change Type	Module(s)
2024.4 Release	Enhancement	Core

Summary

This was a combination of requested changes from Oracle to reduce the load on their API, requested changes from the client and the MX Engineering team's initiative to improve the Simphony polling service resiliency and performance.

- API transaction data calls now only return new/modified data since the last successful poll for a store instead of the full day's worth of data each time the store is polled.

- The polling times per store are now configurable for nightly Oracle Simphony API database maintenance windows outside of store operating hours and planned maintenance windows. This is configurable via the new Simphony polling service store configuration tab in the CloudLink admin site.

- The polling results of the dimension API calls are now cached in a new tbServiceGroupStoreSimphony extension table per store to reduce the number of API calls to Oracle for data that doesn't typically change throughout the day. The cache duration is configurable and defaulted to 12 hours.

- Added configurable API transaction and dimension call timeouts to Simphony polling service configuration tab in the CloudLink admin site.

Components

Component	User Story
Simphony - Add support for LastModifiedTime on getGuestChecks/getNonSalesTransactions/getKDSDetails API calls	US183700

Create table Simphony - Cache dimension data to reduce API call count	US188286
Simphony - Cache dimension data to reduce API call count	US189351
Simphony - Add blackout window support	US190133

NCR HR Web Bridge - Termination and Reinstatement issues [F24466]

Release Version	Change Type	Module(s)
2024.4 Release	Enhancement	Core

Summary

Trigger exports when clicking 'Remove from store' button

- Reinstate employees when they're granted multi-store access to a store and they were previously terminated from the same store on MMS_System_Employees.aspx.

- Terminate an employee from all stores when the Status is set to Terminated and the 'Save/Update' is clicked with the employee home store selected or the Terminate button is clicked on the employee home store on MMS_System_Employees.aspx.

- Terminate an employee from the selected non-home store when the 'Remove from store' button is clicked from a non-home store or a non-home store is deselected from the Multi Store Access tab when the home store is selected on MMS_System_Employees.aspx.

Components

Component	User Story
NCR HR Web Bridge - Termination and Reinstatement issues	US186442

2024.3 Release Bug Fixes and Rapid Response/DTZ

- [D95641] - POS - POS Integrations – Simphony - CloudLink - Tokens and Login (5
- [D94150] - Scripts to Update Accounting code and vendor account number
- [D94994] - RCA: PROD: Check why IIS consumed 100% RAM
- [D94111] - MXConnect - Inventory Count History - US date format in the count name
- [D91031] - ARTS file import - sometimes has error
- [D87679] - Closed Day script turned into a Stored Proc so support can run
- [D82256] - Simphony Integration - Service should retry restart after maintanance
- [D81906] - 2023.1 - Count Auto Submit does not default uncounted to zero
- [D90930] - MxConnect Inventory movement report show no Variance $ when there is a variance
- [D94974] - HS | PSA - Analytics Ops Summary Report Incorrect Sales
- [D99041] - Employee Import Failures (Import vs UI)
- [D95773] - RDS - Duplicate key in PosTranslationSaleItem
- [D88869] - Inventory Activity With Bom Depletion (Qdoba) Report includes denied transfer.
- [D76421] - RDS public.scheduledorder data discrepancy
- [D81901] - [Unfinished] - 2023.01 - Stock count auto submitted prior to the scheduled time.
- [D81904] - 2023.1 - After a weekly count is auto submitted, a New Weekly Count should not be created
- [D82726] - 2023.01 - Count from some store not auto submitted
- [D82378] - Simphony Integration - Sales Total does not match Payment total due to voids [5]
- [D81911] - 2023.01 - Finish Count - Apply Date issue.
- [D90165] - Selected Display in e-MP&C Not Retained After Locking and Re-Logging Back in
- [D91348] - Inventory receiving inflated after apply date change
- [D94838] - NCR HR Web Bridge - Changing home store should successfully terminate employee in NCR for old store [3]
- [D91514] - Simphony integration - $0 transactions
- [D96836] - Employee import incorrectly overwrites fields on import
- [D91515] - Simphony Integration - Cancelled sale shows TransactounCount = 1
- [D94274] - RDS - TransactionSaleItem - ServiceTypeId not populated on full load
- [D96645] - Missing items during ordering

- [D98312] - [2024.3 Warranty] Forecasting Sales page Usability Issues

- [D98314] - [2024.3 Warranty] Sales Item selector Issue

- [D98320] - [2024.3 Warranty] Blank Column in Transfer When using transfer level reason

- [D98372] - MxConnect Cashier close - Skim field inconsistancy to MMS

- [D98410] - MxConnect cash setting used in different module

- [D98507] - MxConnect workflow - shows Previous Work Flow Incomplete when there's no previous

- [D98508] - (Converted to UserStory) - MxConnect workflow - ConfirmComplete flag incorrectly used

- [D98543] - [2024.3 Warranty] Promotion Adjustment Not showing in the System Adjustments Info

- [D98545] - [2024.3 Warranty] Sorting in Sales Item Search Form

- [D98564] – Issue to show the same transaction qty and sales amount in open drawer list under mobile CashReconciliation page

- [D98603] - [2024.3 Warranty] Cover Until date/time incorrect in Suggested Ordering Detail

- [D99069] - Recipe Items - importing issue API

- [D99262] - DEF001 - Sales Dashboard - Page title shows conflicting/confusing store names for multi-store Store Manager

- [D99266] - DEF005 , REQ006 - Safe Count - Able to enter Top Safe more than Total Safe Count and authorise it

- [D99387] - Mobile will prompt the message ""The requested operation failed"" when click one transation record under mobile transaction viewer page

- [D99388] - Mobile has some blank fields under waste history page

- [D99421] - Daily Reconciliation - Await Banking and Banked Amount are always 0

- [D99424] - DEF013 - Misspelling in ""Suggested Ordering Detials"" panel when creating MXConnect order

- [D99427] - DEF015 - Stock Count Review Colours Feedback

- [D99466] - REQ016, REQ017, DEF016 - MXConnect Transaction Viewer Feedback

- [D99469] - DEF017 - MXConnect Help doesn't show number of articles for a store manager

- [D99638] - DEF018 - MXConnect Safe Count - Difficult to view Edit and Delete options after adding Float skim under Night section

- [D99639] - DEF021, DEF022 - MXConnect Transaction Viewer - formatting and scrolling to the transaction details

- [D99800] - DEF020 - MXConnect Transaction Viewer - Allows Date Range Over a Week

- [D99801] - DEF024 - MXConnect Weekly Forecasting - 3 or more touches required to open date, sometimes multiple touches results in no action

- [D99802] - REQ003, DEF030 - MXConnect Cashier Reconciliation - Error Saving Cash Count

- [D99849] - DEF026 - MXConnect Transaction Viewer - Transaction results are displayed in descending order

- [D99851] - DEF028 - MXConnect Help Administration from tablet device

- [D99856] - Mobile workflow has 'on account sales' task date jumping issue

- [D99931] - DEF035 - Cashier Close - Cursor allowed to traverse the counts and move between both in parallel

- [D99932] - DEF036 - MXConnect Cashier Close - Register count has fields to count

- [D99995] - DEF009 - MXConnect Safe Count - Top Safe ""Variance not allowed"" message not noticeable

- [D100115] - Sales Queue - All Sales Messages Error

- [D100784] - REQ001 - Safe Count - Money counting process - issue#2