Concepts

Setup Guide

Document Details

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Overview

This document provides details to help corporate users define Concepts in Enterprise Manager.

Download the latest version of this document here:
https://links.crunchtime.com/EMSG-ConceptSetup

… or scan the QR code to the left.

Related User Group Permissions

Screen Name	Control Name	Description
Concepts	Add/Delete/Save	Add or delete a concept, make and save changes.
Concepts - Association	Add/Remove/Save	Add or remove concept/entity relationships, save changes.
User Groups	Add/Delete/Save	Add or delete a user group, make and save changes.
Application Users	Add/Delete/Save	Add or delete a user record, make and save changes.
Application Users - Concepts	Add/Delete	Add or delete concepts from an application user record.

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Concepts

Overview

Concepts can be used to help customers compartmentalize data, access, brands, and even regional setup & maintenance. Concepts allow corporate a layer of control while operating in one database. This guide will walk through the steps to configure concepts in Enterprise Manager. Lastly, Concepts cannot fix all access or compartmentalization needs –there are some situations where a second database will be required.

Operational Needs that can be solutioned with Concepts:

- Managing multiple POS systems
- Brand Differentiation (i.e. for Products, Recipes, Markets, etc.)
- Regional Brands (i.e. Restaurants UK/France)
- Managing access differences across brands
- Managing access differences across regions
- Managing access differences across franchisees (i.e. consultants help onboard, manage maintenance)

Getting Started

In order to begin, the customer will need to provide their mapping or hierarchy of how the above needs are organized. For example, if the customer needs specific access for Regional Brands – denoted above as UK/France Restaurants, we will need the following applicable data specs:

Restaurants - UK	***Restaurants - France***
• Product List • Recipe List • User List • Access Differences • Franchisee Access • Markets Access • Locations	• Product List • Recipe List • User List • Access Differences • Franchisee Access • Markets Access • Locations

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Concepts

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Getting Started (Continued)

For example, we expect to receive the breakdown as follows:

Restaurants - UK	***Restaurants - France***

• P1000 - P1200
• R1300 - R1450
• J. Smith, K. Randall
• Franchisee Codes
  ○ 001
  ○ 005
  ○ 008
  ○ 011
• Markets
  ○ London Proper
  ○ London Suburbs
  ○ Scotland
  ○ Wales
• Location Codes
  ○ All locations serviced by the three markets, and encapsulated in the franchisees
	• P1201 - P1400
	• R1500 - R1700
	• C. Beauchamp, A. Fournier
	• Franchisee Codes
	  ○ 002
	  ○ 003
	  ○ 004
	  ○ 009
	  ○ 010
	• Markets
	  ○ Paris
	  ○ North France
	  ○ South France
	• Location Codes
	  ○ All locations serviced by the three markets, and encapsulated in the franchisees.

Tip: Locations, Products, Recipes, Application Users, etc. can be shared by Concepts, meaning they can be assigned to multiple concepts at the same time.

Note: All products, recipes, locations, etc. will need to belong to a concept. If you only create a concept for the UK region and not France - those assigned to the UK concept will still be able to see ALL data points, whereas those NOT assigned to the UK concept will NOT be able to see the UK data points.

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Concepts

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Managing Group Access

If you have multiple consulting groups managing your different brands – you will need the above breakdown of how the brands need to be split, as well as to which data points the consultancy groups need access.

Example: If Consulting Group A oversees locations on your behalf in both the UK and France - you will need to build a hierarchy isolating what oversee and build a new concept for that group. This can be done as many times as needed to cover the different groups of consultants.

Consulting Group A

• P1000 - P1400
• R1300 - R1700
• J. Jones, G. SanSouci
• Franchisee Codes
  ○ 001
  ○ 003
  ○ 004
  ○ 008
• Markets
  ○ London Proper
  ○ Paris
• Locations
  ○ All locations serviced by the London Proper and Paris Markets in the above Franchisee Codes

If you compare the Consulting Group A hierarchy to the France and UK hierarchies - you will notice that it is able to be made more restrictive to the needs of that consulting group despite it crossing both regions.

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Concepts

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Managing Permission Differences

User Groups allow for Application Users within Crunchtime to access various screens and complete necessary transactions. These are completely customizable to every customer and you can create as many as needed to manage security and access permissions for all users.

It is not uncommon that using concepts and segmenting data in the system also comes with setting up new user groups, since they also aid in limiting access to certain screens and features. We have an interactive User Group Workbook to allow customers to define the needs of their new user groups, build segmented user groups, or even mock up variations of the same user group. It is encouraged to build new user groups, especially with varying access needs across consulting groups, so that you can proactively limit various screens that those users should not see.

For Example:

Corporate Admins will be assigned to ***Super User***. Franchisee Consultancy Admins will be assigned to the new user group ***Super User (Franchisee Consultant)***. The ***Super User (Franchisee Consultant)*** user group can be built or copied from the main ***Super User*** group, however as time and business needs change, corporate owns and has the ability to control the two sets of users differently.

Note: The ability to view/edit Application Users and Vendors can be controlled only by User Group permissions; this cannot be limited by concept/region.

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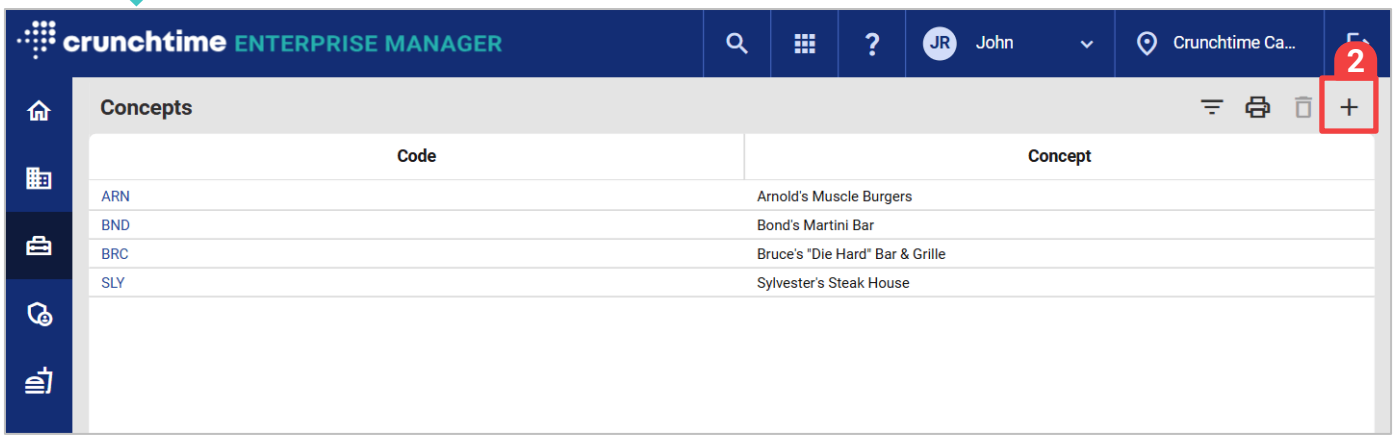
SETUP GUIDE

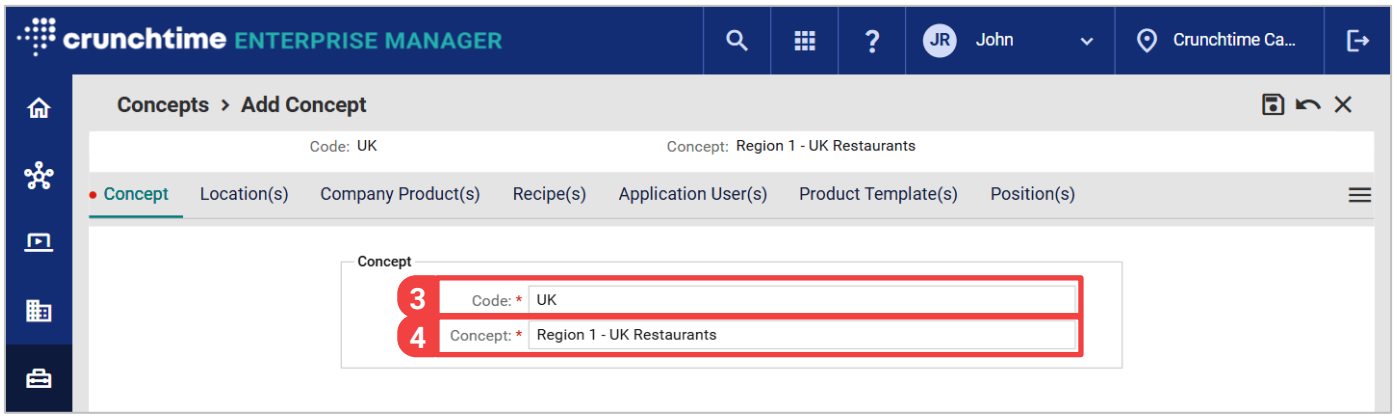
Concepts Setup

Once the above exercise is complete, you are ready to set up your Concepts and related User Groups and Application Users in the system. We will begin with building a Concept.

Enterprise Manager > General: Concepts



1. Under the General menu, select *Concepts*.
2. To create a new Concept, click the + (*Add*) icon.



3. Enter the Concept *Code*.
4. Enter the name of the *Concept*.

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Concepts Setup

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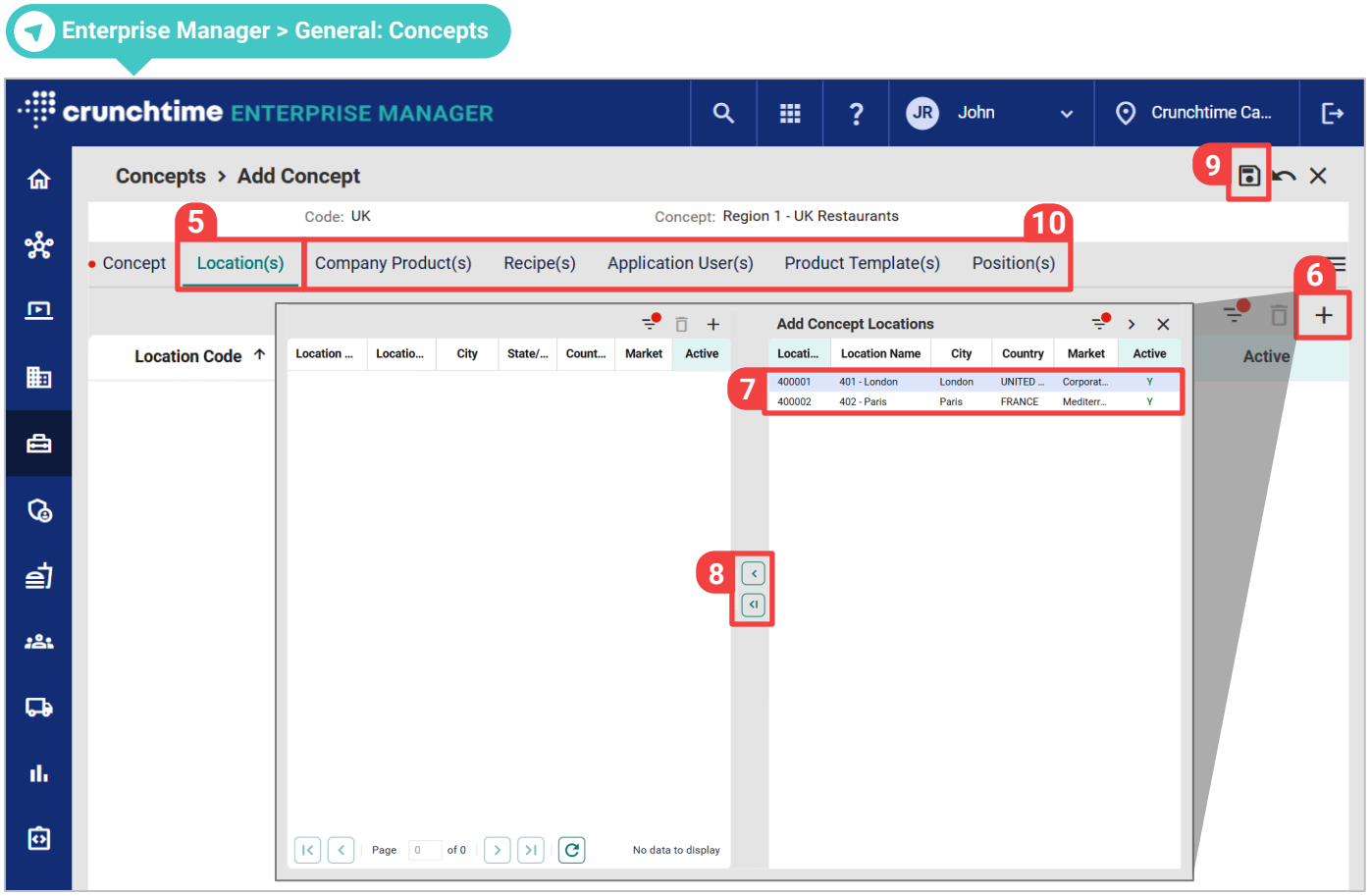

5. Select the *Locations* tab.
6. To add locations to this Concept, click the **+** (*Add*) icon.
7. Select the Location(s) to add. (*If necessary, you can filter the list*).
8. Click the [**<**] icon to add the selected locations, or simply click the [**<|**] icon to add all locations.
9. To confirm your selections, click the *Disk* (Save) icon.
10. To add *Company Products*, *Recipes*, *Application Users*, *Product Templates*, and/or *Positions*, select the appropriate tab and repeat steps 5-9 above as needed.

Tip: If the necessary *Company Products*, *Recipes*, etc. are not already in the system, they can be added to the Concept later once they have been defined.

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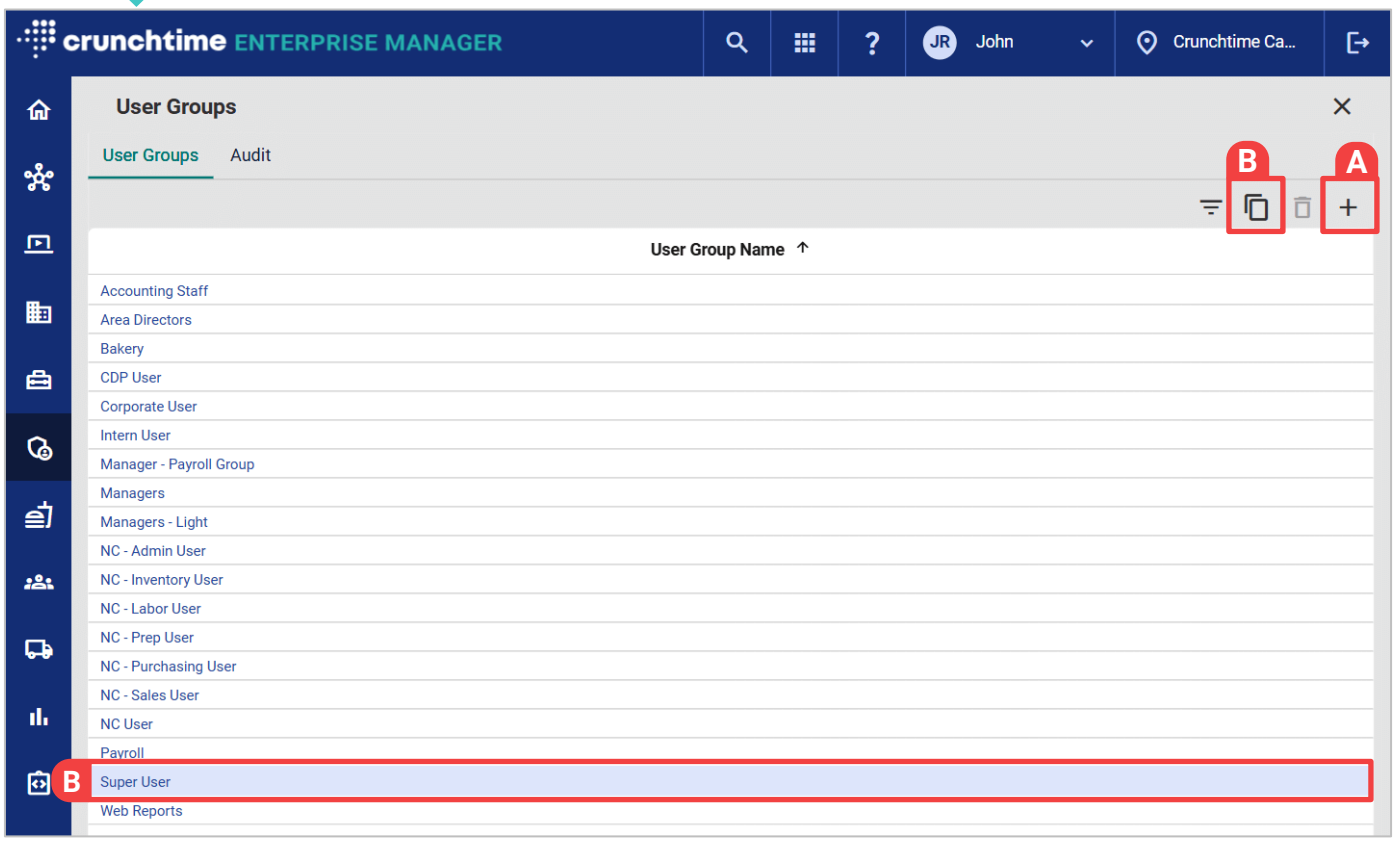
User Groups and Application Users

Once the Concept has been created, you can work on setting up the related User Groups, and then proceed to create the related Application Users. You should already have completed the User Group Workbook to define which permissions will be enabled for each User Group.

User Groups

Enterprise Manager > Security: User Groups



1. Under the Security menu, select *User Groups*.
2. You can create a new group by doing either of the following:

   A To create a new User Group, click the **+** (*Add*) icon.

   OR

   B Select an existing User Group and click the *Pages* (Copy) icon.
3. Whether created or copied, make the updates to the new user group based on the permissions tab in the User Group Workbook; be sure to enable all necessary permissions, screens, and transactions needed for this particular User Group.

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User Groups and Application Users

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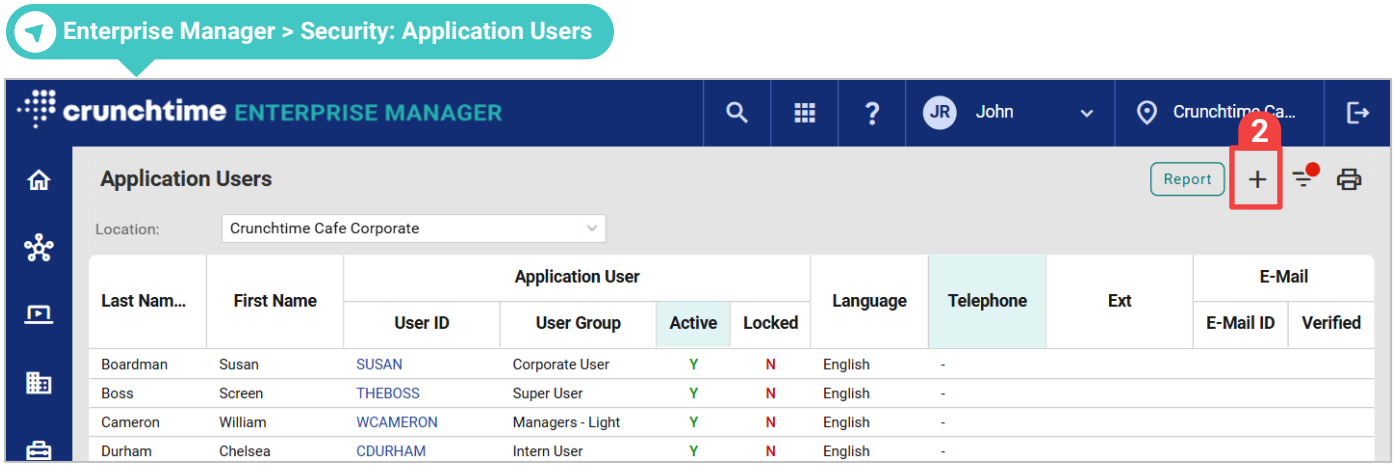
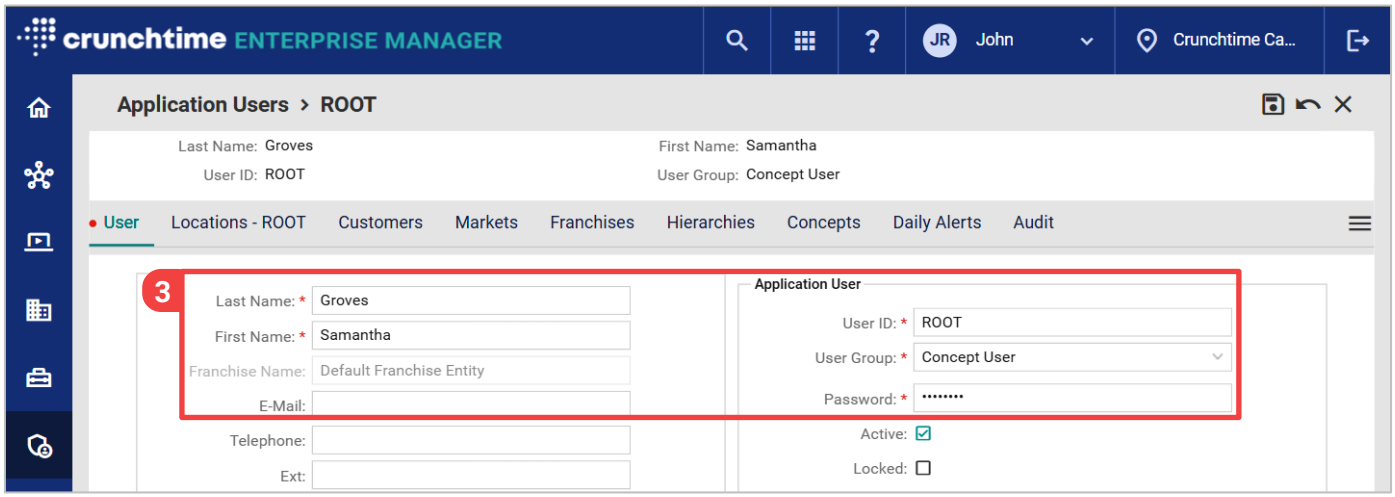
Application Users

Finally - add the new Application Users that will manage this sub-section of data.



1. Under the Security menu, select *Application Users*.
2. To add a new user, click the + (*Add*) icon.



3. Fill out the key required fields denoted with a red asterisk (*); be sure to assign the appropriate User Group that was created for the Concept user(s).

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User Groups and Application Users

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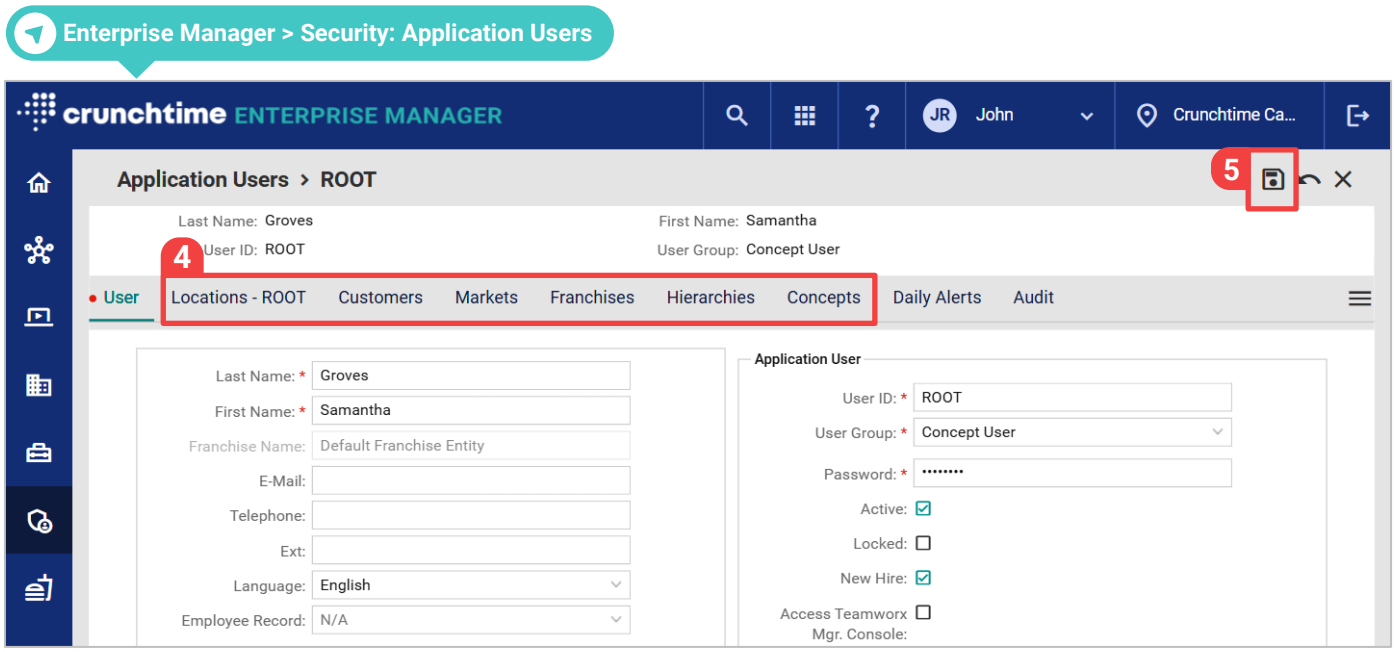
Application Users (Continued)



4 Use the *Locations*, *Markets*, *Franchises*, *Concepts*, and/or *Hierarchies* tabs to complete the user record, following the logic below:

- *Locations*: The locations added here should be those that this particular user can create and edit transactions for; this can be the same list as applied to the regional concept or it can be more limiting depending on the job requirements of this user.
- *Markets*: Markets should only be added if the user is repsonsible for entering vendor prices on Bid Sheets, and only those markets that the user is responsible for, ie. if this user is for the UK Regional Concept, then they should only have access to the markets that supply that region (restricting their data to the region they are responsible for).
- *Franchises*: The franchises added here are the ones this user will have the ability to access, ie. if this user is for the UK Regional Concept then they should only have the franchises that are supported and managed by that concept.
- *Concepts*: This allows you to add new concepts to an application user, and see the existing concepts that have been linked to this user.
- *Hierarchies:* If a hierarchy exists that would support this user running various consolidated reports or seeing the consolidated dashboard view, you can apply their appropriate hierarchy level here.

5 To confirm your configuration, click the *Disk* (Save) icon.

Once all this setup is complete, please test the User and make any necessary changes. As you continue to add new locations, products, recipes, etc. the Concepts will need to be updated regularly.

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