

FOOD-TRAK® System Version 5.0 ReadMe

The 5th generation of the FOOD-TRAK System is here! Starting with version 5.0, to be released in May of 2016, the version 5 series will focus on the ability to access the system from any platform, be it desktop, mobile or cellular. It also introduces a new 24/7 support portal, news, training resources and social networking connectivity with other FOOD-TRAK clients. As with all previous versions, we continue to add new features, speed improvements and ease of use design.

The major change you will notice with version 5.0 is the look and feel of the main menu. The previous tree structure with navigation on the left side has been modernized with tabs across the top and animated drop down menus. Icons are more descriptive. Recently used icons have been replaced with a new “favorites” capability.

Once you get over the difference in the main menu design, which we believe you will master immediately, the rest of the system is unchanged with regard to the user interface. So there is no need for extra training to use the new version. This document is designed to show you some of the changes you will encounter in this new version of the software, and then goes on to describe new features. It is our intention to help you prepare for the new version by familiarizing you with them before you use the software.

Of course, we continue to offer training options if you so desire, including FOOD-TRAK University classes, customized advisory hours personal training, on-site training services. Our Boot Camp 4-day course is another way to gain exposure to all aspects of the most recent version.

No Support for Previous Versions:

As a reminder, we support only the most current released version of the software. As of this release, versions 4.73 and prior will no longer be supported. We do this to ensure fixes to all known software errors have been incorporated into the current release. By maintaining your system at the current version, you can be sure that any errors you encounter have not previously been addressed. In the event you contact the Support department, you will be asked to upgrade to the current version if you have not already done so. Therefore we encourage all clients to upgrade as soon as possible.

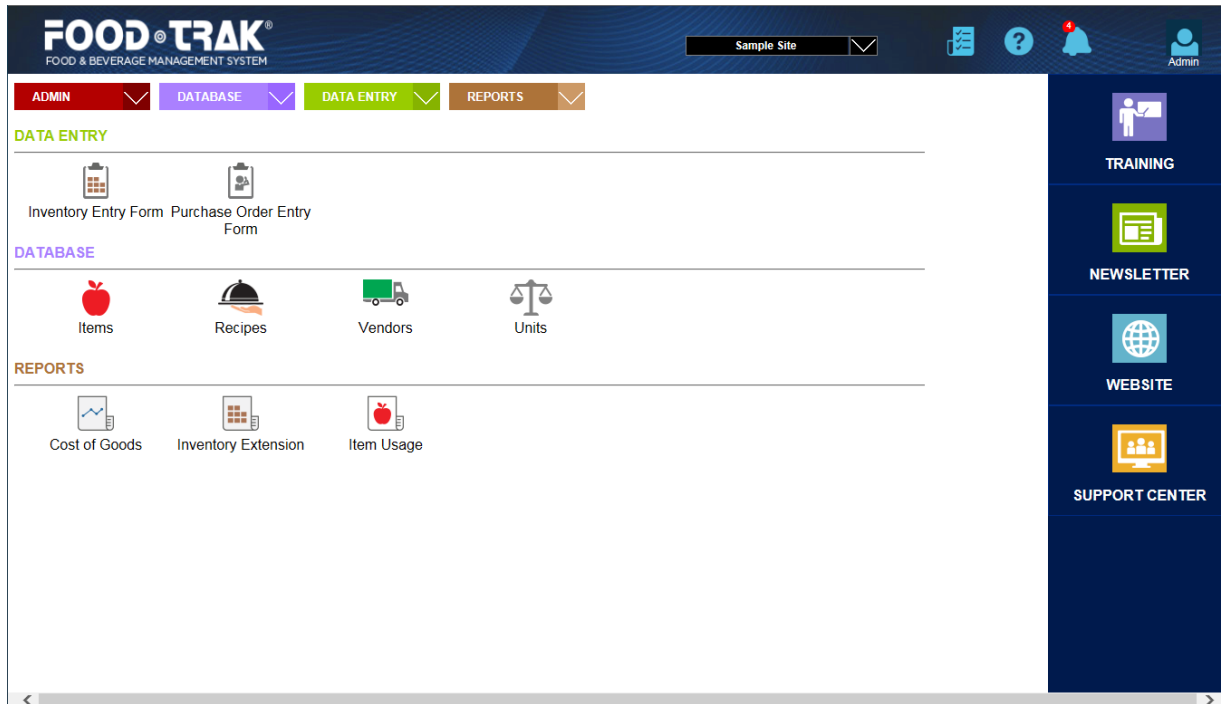
Installing the Upgrade (Self-Hosted Licensed Clients Only):

The upgrade is automatically installed for hosted clients. Clients who have licensed the software to run on their own hardware can find a link to the upgrade file and upgrade instructions on the Updates page (FOOD-TRAK client web site). The documents are: FOOD-TRAK 5.x Installation Guide and FOOD-TRAK® 5.x Upgrade Guide. To obtain the full installation media please contact your Client Services Representative. We provide an update service at additional charge if desired.

New in FOOD-TRAK® v 5.0:

New Graphical Main Menu! One of the very cool features of FOOD-TRAK 5.0 is how easily you can access the information through our new tile-based main menu. The new method of navigating the system proves to be a more efficient user experience.

You can access more features with less clicks. In older versions, there was a need to expand folders from a tree-view to find the desired function. Now, upon login you have a user-configurable workplace that puts the desired function right on the main menu, just one click away.



Unique Simultaneous User Name Requirement: Starting with version 5.0, users should be assigned unique ID names. The system does not allow two users with the same login ID to use the system at the same time. See section 2.1 for details.

New 24/7 Support Center requires E-Mail address: Our new Support Center, accessible from the main menu requires users to have an e-mail address associated with their user ID. See section 3.1 for details.

No Support for Internet Explorer Versions 7 or 8: Due to the need for cross-browser capability in the version 5 series, the system can no longer support versions 7 or 8 of Microsoft Internet Explorer or any version prior to version 9. Clients using versions 8 or lower will need to upgrade their browser.

1 General

1.1 Favorites

A Favorites feature now allows you to build your own workplace. Upon upgrade, the Home page is populated with your most recently accessed functions in each functional category to get you started. These are the same functions you saw on the main menu in previous versions listed as “recently accessed”. They have been converted to “favorites” and listed in three categories – Database, Data Entry and Reports. You can have up to 10 in each category, and all of them show up on the main menu.

You are now in control of this workplace as you have the ability to add/remove favorites at will. Think of it as your FOOD-TRAK Desktop!

2 Login

2.1 User Authentication

The system no longer allows more than one user with the same ID to be logged in at the same time. For example, if a generic login like "User1" is being used by more than one user, only one will be allowed to login. If the second user attempts a login at the same time with the same user information the login will fail. This restriction was introduced to make audit trails more accurate and to allow better service through the new Client Support Center.

3 System Administrative Functions

3.1 User Manager

To access the Client Support Center from the main menu a user's email address is required. Email is, and will continue to be, an important mode of communication with our Support staff. In preparation, we highly recommend that you ensure that each user have a current email address on file. The email address field in version 4.7x is on the General tab of the User Manager available at System Administrative Function > Corporate Functions. In version 5.0 the user can change his or her own email address using the My Account feature (see 4.1 below).

Please be advised that a user without an email address will not be able to access the Client Support Center even if they are given explicit privileges in the system.

4 Main Menu

4.1 My Account (New feature)

A new feature has been added to provide a quick way to change your email address or password. We refer to it as the My Account feature.



The My Account feature is represented by this icon.

4.2 New Training Button

In an effort to make Information about our training and consulting services more readily available, a **Training** button has been added to the right side of the main menu. By default it opens a new tab with a web page describing available FOOD-TRAK training options.

A new security key has been added to control user access to the training information from the main menu. Post upgrade status is enabled (button available). It can be turned off to remove the button.

4.3 New **Newsletter** Button

The latest FOOD-TRAK newsletter is available by clicking the new **Newsletter** button on the main menu.

A new security key has been added to control user access to the newsletter from the main menu. Post upgrade status is enabled (button available). It can be turned off to remove the button.

4.4 New **Support Center** Button

A **Support Center** button which provides access to the new Client Support Center has been added. This button opens the Support Center web site on a new tab where you can submit or monitor support cases and participate in our new community forum.

A new security key has been added to control user access to the Support Center from the main menu. Post upgrade status is enabled (button available). It can be turned off to remove the button.

4.5 New **Website** Button

Access to the FOOD-TRAK website is made easier by having this link available from the main menu. When selected, a new browser window opens and you are placed on the FOOD-TRAK website. You may access all areas of the website, including the Client Site, without the need to login as you have been authenticated through your FOOD-TRAK login.

A new security key has been added to control user access to the website from the main menu. Post upgrade status is enabled (button available). It can be turned off to remove the button.

4.6 Site Name and Switch Site

The name of the Site you are logged in to is displayed on the top right side of the main menu. It was formerly displayed on the top left side of the page. The Switch Site feature is available from the same area, which makes for more intuitive navigating.

4.7 New Icons

The menu available at the top of most functional screens has been replaced with icons that are larger and easier to click or tap (for Pad purposes).



The Tasks function is represented by a notepad icon.



The Alerts function is represented by a bell icon. If alerts are pending, a visual indicator appears at the forefront of the icon to let you know how many are pending.



The Help feature is represented by a question mark icon.

5 Database

5.1 Interface Functions

Traditionally interface functions have been placed in various folders based on the type. In this version, all interfaces have been relocated to a new **Interface** menu (accessed from Data Entry). FOOD-TRAK Mobile Partner, Point of Sale, Vendor, Accounts Payable and Catering Interfaces that are licensed and allocated to your site are displayed here post-upgrade.

5.2 Sales Mix Entry Form

Two additional columns of information have been added to the Sales Mix Entry Form view. The view displays a column for the Profit Center designation and a column for the form description.

The Description column displays the description that has been entered on the Sales Mix Entry Form header. The Profit Center column displays the Profit Center name when only one profit center is represented on the form. If more than one Profit Center is represented on the form, the Profit Center will be designated as "Multiple".

6 Reports

6.1 The Sales Mix Entry form selection window for report wizards has been enhanced to include the Profit Center designator to further help identify the form in the wizard. The following report wizards were changed as a result:

- Profit Center Sales Recap
- Product Contribution
- Product Cost
- Red Flag
- Product Cost By Profit Center
- Menu Engineering - Product Category Chart Report
- Menu Engineering - Sales Analysis Report
- Menu Engineering - Popularity Grid Report (chart)
- Menu Engineering - Price Point Graph
- Sales Forecast Report
- Forecast Reorder Report
- Preparation Forecast Report

7 Other Changes You May Notice

Many of the changes in version 5 are too minor to mention. Most have been made to better define their function and to make the system easier to use. The following changes were made to report or module titles only. They have no effect on system operation.

- The *Advanced Procurement* module has been renamed. It is now called "*Enterprise Procurement*" to better explain its purpose.
- To remove confusion and better describe the Cost of Goods reports in the system, the Cost of Goods report found on the Control menu was renamed "*Cost of Goods – Estimated*".

8 Modules

8.1 *FOOD-TRAK Mobile Partner*

8.1.1 This version contains an update to the FOOD-TRAK Mobile Partner software. The update provides bug fixes and compatibility with FOOD-TRAK v5.0. New features are not included.

Please expect an update to your mobile device when you synchronize your device the first time after this update.

8.1.2 The Remove FMP Registration function is no longer available from Site Level Functions. It has been moved to System Administrative Functions.

8.1.3 The FOOD-TRAK Mobile Partner icon is no longer available from Administration. It can be accessed from Data Entry > Interfaces.

8.2 *PAD Module*

Graphics on the Main Menu of the PAD Module have been enhanced to appear more like their FOOD-TRAK v5.0 counterparts.

8.3 Commissary

8.3.1 Sales Order Selection

Views available from the Sales Order Entry Form function now adhere to the additional security key detailed below (see 8.3.3.1). Users that have been granted the “Bypass Customer level security configurations” security key have the ability to access Sales Order Entry Forms or templates for any Customer in the Commissary Profit Center they have access to.

8.3.2 Shipper Form Selection

Views available from the Shipper Entry Form function now adhere to the additional security key detailed below (see 8.3.3.2). Users that have been granted the “Bypass Customer level security configurations” security key have the ability to access Shipper Entry Forms or templates for any Customer in the Commissary Profit Center they have access to.

8.3.3 Security Keys

Additional security keys allow users to handle and print orders and shippers for all customers. A user with this security permission ignores the restrictions assigned to each Customer in the site.

8.3.3.1 A security key, “Bypass Customer level security configurations”, has been added under Access Sales Order Entry Form. When granted the key allows the user to order for any Customer in a Commissary Profit Center they have access to.

8.3.3.2 A security key, “Bypass Customer level security configurations”, has been added under Access Shipper Entry Form. When granted the key allows the user to ship to any Customers in a Commissary Profit Center they have access to.

8.3.3.3 A security key, “Bypass Customer level security configurations”, has been added under Access Commissary Reporting Features. When granted the key allows access to reports of Sales Orders and Shippers for any Customers in the Commissary.