

WHERE MATCHLESS SERVICE MEETS PRACTICAL ENGINEERING FOR EXCEPTIONAL SOLUTIONS.

# NGO User Preferences and Grid Settings

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**TOTALLY INTEGRATED SOLUTION** 

102 MILL ST. P.O.BOX 412 / WELCOME, MN 56181 / TEL:507.728.8214 / F: 507.728.8215 / WWW.EASY-AUTOMATION.COM



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### Adding & Editing User Permissions

1. Go to "Maintain" and then "Users."



2. To add a user, choose "Add" on the left side of the window. Enter the user's first/last name, and username.

Auu	Username First Name Last Name Job Title Last Login Comments User Type Activ
Edit	Edit User : MConrad
ОСору	First Name: Michele Last Name: Conrad
Set Inactive	Username: MConrad
E	Main Details Permissions Mill Batcher Access Event Subscriptions Report Access
view Inactive	C Password:
F	Password Confirm: ••••••
f	er Mill:
4	K Batcher:
	Job Title:
	Comments:



- 3. On the "Permissions" tab choose the user's access capability.
  - a. Administrator access level has access to all areas of the program.
  - b. Normal User access level allows selection of specific areas of the program.

📕 Edit User : MConrad									
First Name: Michele	Last Name: C	onrad							
Username: MConrad									
Main Details Permissions Mill Batcher Access Event Subscriptions Report Access									
O Administrator O Web Service User									
Normal User      Scale R	eceiving User								
	✓ Ingredients	Preorders	Scale Ticket Delete	Utility: File Import-Export					
Bypass Signature	Inventory Adjustments	Price Levels	Scale Ticket Weight Edit	Vendors					
Contracts	Inventory Transfers	Price Quote	Service Items	Vet Feed Directives					
Credit Hold Override	Item Inventory	Price Schedule	Spreadsheet Pricing	VFD Override					
Customers	Load Template Creation	Pricing	Standard Cost Update	Warehouse Loading					
Discount Schedule	✓ Locations	Purchase Orders	System Settings						
Email Groups And Settings	Market Cost Adjustment	Receipt Costing	Table Settings						
Farm Bins	Mill Bin Empty	Receipt History	Tags						
Formulas	Mill Bins	Receipts	Unit Conversion						
Grain Banks	✓ Mills	Reconcile Dropship Orders	User-defined						
Groups	☑ Order History	Reports	Users						
History View/Edit	✓ Ordering	Restock Item Cost Update	Utility: Cross Reference						
		Select All Clear All							
		Save Cancel							

4. Set the Site Batcher Access. First, go to the "Site Batcher Access" tab. This specific user will only have access to the mill & batchers selected.

obernamer p	COURTER					
Main Details	Permissions	Site	e Batcher Access	Event	Subscriptions	Report Access
Available	Descriptio	n			Available	Description
	Commercial N	1ill				BetaRaven
Sec. 1	Fairmont Mill					Manual
	Welcome Mill					NexGen
						Sales Orders
						FBP Batcher
						Manual Batc
						Manual Batc



5. Set the Report Access. First, go to the "Report Access" tab. Either choose "Select All" or choose the specific reports this user can view.

📕 Edit User : MConrad		
First Name: Michele L	ast Name: Conrad	
Username: MConrad		
	E la la la r	Depart Arran
Main Details Permissions Mill Batcher Access	Event Subscription	s Report Access
Select All		
Report Name	Access	
Mill Detail Report		A
Customer Locations		
Farm Bins By Location		
Test Report With Signature		
Ingredient By Mill		
Item By Mill	$\checkmark$	
Location By Mill		
Formula Detail w/Cost		
Formula Summary w/Cost		
Formula By Mill		
Formula History Detail		
Formula History Summary		
Formula History Ingredient Summary		
Group History Detail		
Group History Summary		
Location History Detail		
Location History Ingredient Summary		
Location History Summary		
Formula History Detail w/Cost		
Formula History Summary w/Cost		
Formula History Ingredient Summary w/Cost		v
		<u>Save</u> <u>Cancel</u>

- 6. Click "Save" to save your changes.
- 7. If this user has a specific (Default) site and/or batcher they want to see on every screen, edit the user and fill in the site and batcher fields. This can only be done after the user has been given access to that mill and batcher.

First Name			Last Name:		
Username	:				
Main Deta	ails Perm	issions Site Batch	er Access Event Subs	scriptions Report Access	
Password					
Password	Confirm:				
Site:	Comm	ercial Mill 🗸			
Batcher:	NexGe	n 🗸			
Job Title:					



### User Preferences: Customizing Your User Preferences

- 1. Log into NexGen Office.
- 2. At the top center of the page click on your user name, then click "User Preferences."

att Order	s Maintain Report	s Pricing Invento	bry Utilities Syster	n window Help	•	Logged	In User: Michele Conrad ( MConrad )
G	8	0	0	0	0	2	Jser Preferences
Mills	Customers	Locations	Ingredients	Formulas	Orders	History	Refresh

3. User Preferences should be set and saved. Some will not take effect until the program is refreshed or closed and reopened.

	User Preferences	
	User Interface Delivery Ticket	
Password Managment Users can change their own Passwords	Company: Current User: Michele Conrad (MConrad) Password: •••••••• Mill: Marshall Dairy ~/	Mill/Batcher Selection The User can select their own default Mill/Batch from the list of Mills/Batcher
Navigator Displays Feed scheduled/ quanity batched, Inventory low level warnings	Password Confirm: ••••••• Batcher: Dairy v General Display Settings Show Navigator on Startup Dropdown Display O Both  Description Name Total Start	allowed in thier User setup Font Size Users can adjust the Font for Tables and Labels
Dropdown Display Options to show Description, Name Or Both	TreeView Display Both  Description Name Colors Background Color Colors Co	Suggested Range 10-15
OrderList Settings Portrait - Orders move Left to Right Landscape- Orders move top to bottom	Shipment Loadout Settings Touch Screen Mode OrderList Settings Portrait Landscape Small Buttons Large Buttons	Do not enable unless the user has a touchscreen monitor & will not be using their mouse
Button Bar Settings Button Size - Large or Small Location - Set orienation	PurchaseOrderList Settings O Purchase Orders @ Purchase Order Details History View Settings Default History Days 1 @ Email Client Email Client Button Bar Settings Button Bar Settings	Browse Default History Day Sets the number of days loaded in history. The more days loaded the longer it takes. Suggested 30-60 days
of button bar Button Selection- Only buttons checked will appear on the Bar. Other options will need to be entered via menu navigation	Location Top Mills Service Items Second Contracts Second Contracts Second Contracts Second	v



#### Grid Settings: Customizing Your Grid Views

Every grid throughout the program can be customized by user. Once you get your grids set, close the program and reopen to save them.

1. Clicking on the line between column headers and dragging allows you to expand the column wider.

							_							- ¢ 🖻
	Site: All Sites V Batcher: All Batchers V													
Delivery 1	Delivery Ticket Mix Ticket Placard													
Batch	Batch 💼 Reconcile													
Count: 2	Clear	Filter: Status	~ Cor	ntains v		Tota	al: Target Qty.	3.50 Tons						
Sent / Pend	ling Order Li	ines		_										
Status	Order #	Ext. Orde	Site	Batcher	Custome	Custome	Location	Location	Feed Line	Group Na	Group De	Phase	Item Name	Item Desc.
Sent	1348 / 1		Commercial Mill	Sales Orders	Stacie Shaw	Stacie Shaw							Blend 1 upd	Blend 1 NE
Sent	ent 1350 / 1 Commercial Mill NexGen CASH									Cattle GF 1				

2. Clicking on the column header and clicking and dragging allows you to move the column.

														l – l ë 🖻
	Site: All Sites V Batcher: All Batchers V													
Delivery 1	Delivery Ticket Hand Add Ticket Mix Ticket													
Batch	Batch Batch Reconcile													
Count: 2	Clear	Filter: Status	Cont	ains 🗸		Tota	al: Target Qty.	3.50 Tons						
Sent / Pend	ing Order Li	ines												
Status	Order #	Ext. Orde	Site	Batcher	Custome	Custome	Location	Location	Feed Line	Group Na	Group De	Phase	Item Name	Item Desc.
Sent	1348 / 1		Commercial Mill	Sales Orders	Stacie Shaw	Stacie Shaw							Blend 1 upd	Blend 1 NE
Sent	Sent 1350 / 1 Commercial Mill NexGen CASH CASH CASH Cattle GF 1 Cattle GF 1 Cattle GF 1								Cattle GF 1					

3. Clicking once on the column header will sort the column alphabetically. Click again to sort the other direction.

	Site: All Si	tes 🗸 🗸	Batcher: All Ba	tchers $\sim$								
Delivery 1	Ticket	Hand Add Tie	:ket 📄 🕅 M	1ix Ticket	y Yield	rify Lots						
Count: 2	Clear	Filter: Status	```	Contains	~	Tot	al: Target (	lty.				
Status	Order #	Ext. Orde	Site	Ba	tcher Custon	ier Name 🔺 Cu	stome   L	.oc				
Sent	1350 / 1		Commercial Mill	NexG	en CASH	CAS	н					
Sent	1348 / 1		Commercial Mill	Sales	Orders Stacie Sha	w Stac	ie Shaw					
				Deliver	ry Ticket	Hand Add Ti	tket	Mix Ticket	Verify Yield	Placard		
				Count: 2	Clear	Filter: Status		<ul> <li>✓ Conta</li> </ul>	ains 🗸		Total: Targ	jet Qty
			Г	Sent / Pe	nding Order I	ines						
				Status	Order #	Ext. Orde		Site	Batcher	Customer Name 🔻	Custome.	Lo
				Sent	1348 / 1		Commerci	al Mill	Sales Orders	Stacie Shaw	Stacie Shaw	
				Sent	1350 / 1		Commerci	al Mill	NexGen	CASH	CASH	



4. Right click anywhere on the grid to see other options.



- "Clear Sort" will remove any alphabetical sort you set on all columns in that table.
- "Print" will allow you to print the grid as shown on the screen.
- "Set Up Grid Columns" allows you to select which columns are visible to you.
   Uncheck or check as needed to adjust what columns are included in your grid. The available columns vary by table.

📕 Table Settings Adjustment	
Table Name: Pending Order Li	nes 🗸
Column Name	Visible
Batch Date	
Batcher	
Confirmation Number	
Created Date	
Created User	
Customer Description	
Customer Name	
Ext. Order/Line #	
Farm Bins	
Feed Line	
Group Description	
Group Name	
Item Desc.	
Item Name	
Last Edit User	
Location Description	
Location Distance	
Location Name	
Max. Delivery	
Min. Delivery	
Modified	
Order # / Line #	
Order Comments	
Order Grouping	
Order Type	
Packaged	
Pelleted	
Phase	
Priority	
Site	
Site Comments	
Status	
Target Qty.	
Units	
User-Defined 1	
User-Defined 2	
User-Defined 3	
User-Defined 4	
WEDs	
Save	Cancel



• "Export to Spreadsheet" allows you to save this entire grid to an Excel spreadsheet. Clicking this will pop up a file box. Navigate to where you want to save the file, enter a file name and click "Save."

Save As				×
Look in:	History		~ () <b>()</b> ()	
Recent Items Desktop Documents	2022.12 2022_08 2022_12 2023.05 2023.01 2023_01 2023_02 2023_04 2023_04 2023_06 2023_12 2024_01 2024_03			
	File name:	Order Grid Table		Save
Network	Files of type:	xlsx	~	Cancel