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VINx2 Owner Login and Reporting Module

Release Notes

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RELEASE NOTES

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REVISION HISTORY

Name	Date	Reason For Changes	Version
JA	08/11/2007	Initial Creation	1.0

1. Introduction

1.1. Purpose

The purpose of this document is to provide an introduction and walkthrough to the VINx2 Owner Login and Reporting Module. This module provides a restricted owner-only view of the VINx2 winery information system allowing owners of wine products to login and view and report on current stock.

The module is ideally suited to wineries processing a significant proportion of their annual crush under contract. It adds value to contract processing by streamlining the flow of information between winemakers and product owners.

1.2. Intended audience

Primarily, this document is intended to be used as a guide for product owners and those requiring access to the VINx2 Owner Module.

2. Configuration

2.1. System requirements

You are required to use the Firefox web browser in order to access the VINx2 system. It is freely available from www.firefox.com.

You will also require Adobe Reader installed. It's freely available from www.adobe.com.

2.2. Things you will need from the winery

Secure access to the host winery VINx2 server

The URL for the VINx2 database

A unique username and password combination for each individual user

2.3. Things you will need from JX2 Technology

This document.

Our support phone number for help and assistance – +613 8337 0444

Our website is <http://www.jx2.com.au/>

3. VINx2 Owner Access

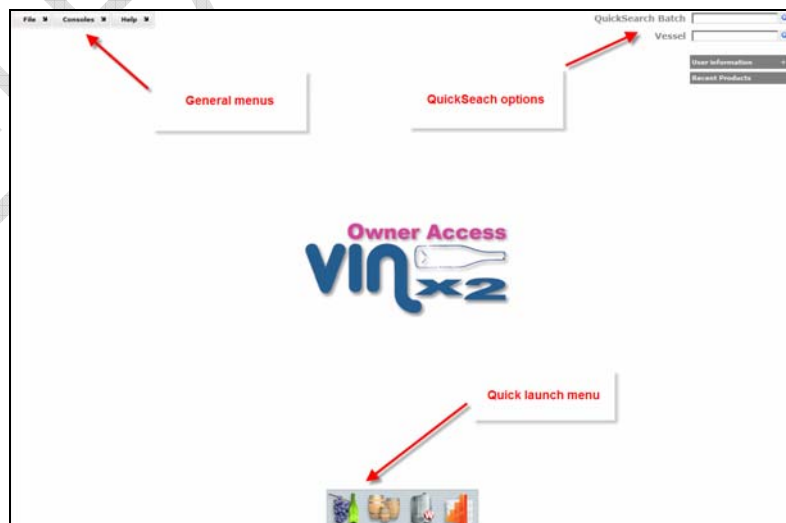
3.1. Logging in

You will need to arrange some form of secure connection, such as VPN, to the host system. Once connected to the wineries network you should use the URL and username and password provided to you to access the system. The login screen follows:



3.2. The VINx2 Desktop

Once logged in, you will have Owner Access to the VINx2 system. This is a restricted view of the system in which you are only able to view products owned by your company.



The desktop acts as the main workbench and provides several menus and shortcuts to gain access to the core features of the system. On the top left, you will see the General

menus consisting of *File*, *Consoles* and *Help*. On the top right are the *QuickSearch* fields for both Wine Batches and Vessels in addition to the information *docks* showing current user information and recently accessed products in the system. At the bottom of the desktop is the *QuickLaunch* menu bar for commonly used areas of the system.

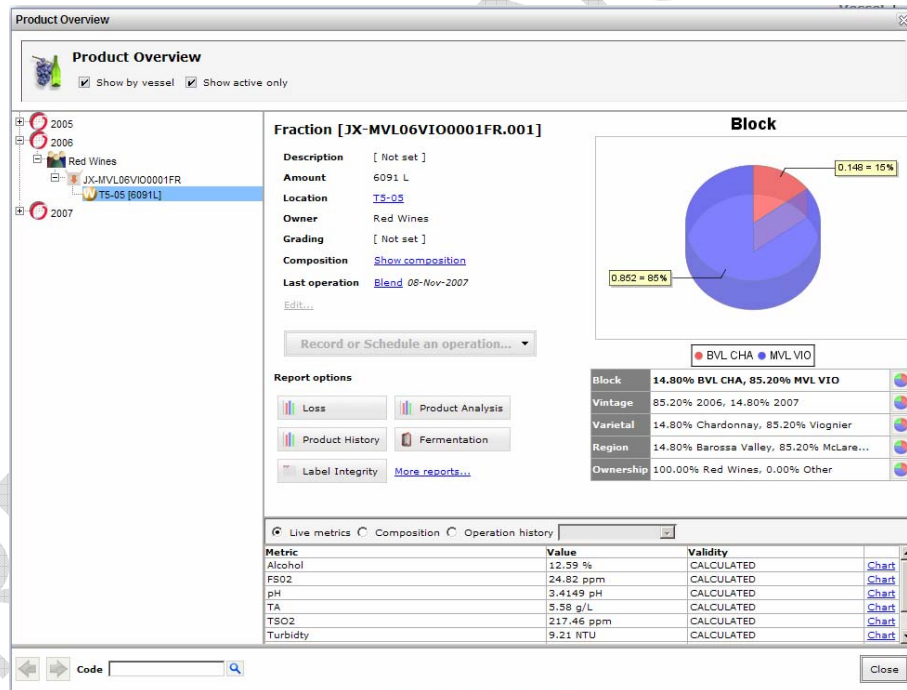
3.3. Product Overview

The *Product Overview* is a console that allows you to browse all the wine batches that you currently own within the VINx2 system. The *Product Overview* can be accessed by clicking the following *QuickLaunch* menu icon



Or it may be accessed from the General menus by selecting *Consoles* and then *Products*.

The Product Overview provides a tree view on the left where all batches of wine or fruit are grouped by production year and owner. You will only have access to the batches that are owned by you.



By expanding the tree to a batch level, you will be presented with the components that constitute each batch. Each individual product will be identified by the vessel that currently holds it.

After selecting a component you will be presented with a summary of the current state of the product. On the right, are several charts representing the breakdown of information for Block, Vintage, Varietal, Region and Ownership. On the left is a summary information panel showing the current amount, ownership, location and grade. There are several

buttons for quick access to reports including Loss, Product Analysis, Product History, Fermentation and Label Integrity. The report options available will differ depending on the current state of the product.

The table at the bottom of the screen has three options:

Live metrics

<input checked="" type="radio"/> Live metrics <input type="radio"/> Composition <input type="radio"/> Operation history			
Metric	Value	Validity	
Alcohol	12.59 %	CALCULATED	Chart
FSO2	24.82 ppm	CALCULATED	Chart
pH	3.4149 pH	CALCULATED	Chart
TA	5.58 g/L	CALCULATED	Chart
TSO2	217.46 ppm	CALCULATED	Chart
Turbidity	9.21 NTU	CALCULATED	Chart

The data represented in this table shows all of the most recent analysis readings against recorded against this product. The *Validity* field has several possible values

MEASURED – this value represents one that was taken on the product and entered into the system as part of an analysis operation. It is the most accurate reading and should be the only reading from which decisions are based.

CALCULATED – this value represents the estimated reading that was calculated as a result of this product being blended with another. It should be treated as an estimate only and a new analysis should be ordered on the wine product for more accurate information.

INDETERMINATE – the product has been blended and it was not possible to calculate an accurate estimate for this metric. Again, it's recommended to order an analysis for more up to date and accurate information.

The *Chart* link will open the Chart and Data form graphing the individual metric over time.

Composition

<input type="radio"/> Live metrics <input checked="" type="radio"/> Composition <input type="radio"/> Operation history			
Percentage	Name	Description	Current Amount
83.58%	JX-MVL06VIO0001FR.002	BACK BLOCK VIO	0 L
16.42%	JX-BVL07CHA031FR.003	BOX TROT BLOCK	8126 L

The data represented in this table shows a breakdown of the components that were blended to form the current product. If you own the batches of those components as well – you will be able click the link to access that product in the overview tree.

Operation history

<input type="radio"/> Live metrics <input type="radio"/> Composition <input checked="" type="radio"/> Operation history			
Date	Rel%	Summary	
08/Nov/2007 17:51	100.00%	Transfer into T5-05 to create blend JX-MVL06VIO0001FR.001 [JX-MVL06...	View
02/Nov/2007 12:12	83.58%	Measured 5091 L of JX-MVL06VIO0001FR.002	View
23/Oct/2007 13:52	83.58%	Stop fermentation on JX-MVL06VIO0001FR.002 due to Natural	View
23/Oct/2007 13:00	83.58%	Alcoholic fermentation started on JX-MVL06VIO0001FR.002	View
09/Oct/2007 12:31	16.42%	Performed analysis on JX-BVL07CHA031FR.003 using template pH/TA/SO2/...	View
09/Oct/2007 11:36	83.58%	Measured 5091 L of JX-MVL06VIO0001FR.002	View

The data represented in this table shows the operational history for this product right back to intake. The *Rel%* indicates how relative this operation is for the current product in light of blends that may have occurred. You can click the *View* link to access a read-only view of the form used to record the operation. You may also filter the list by selecting a particular type of operation from the drop down list. This information is also available in a report format that can be prepared and printed from the *Reports* console.



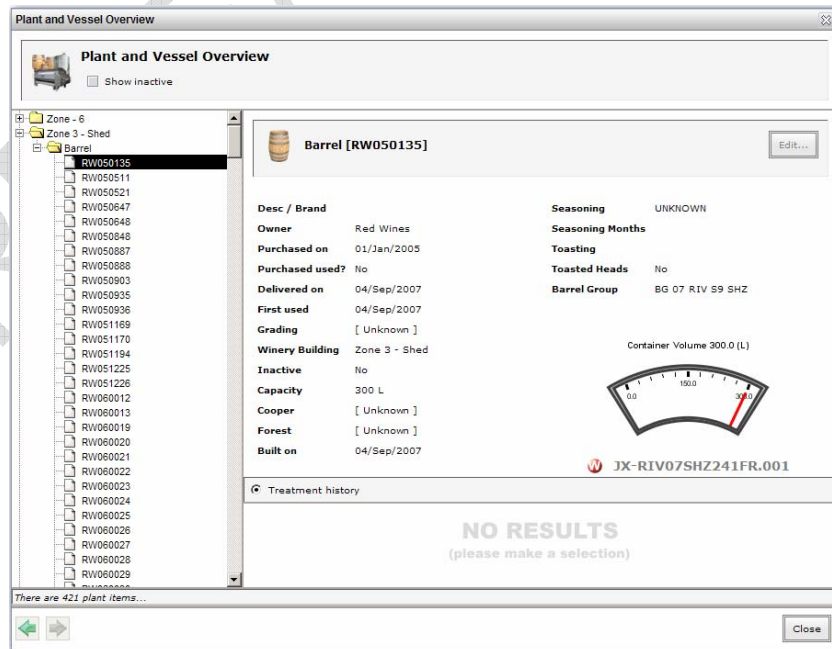
At the bottom of the *Product Overview* form there is a *Code* search field. This field allows you to find a product by batch code. Type a partial or complete code in here and press enter or click the search icon. The arrow buttons allow you to navigate back and forwards through your product selections in a similar way to the “Back” and “Forward” buttons in your internet browser.

3.4. Plant and Vessel Overview

This console allows you to view your own equipment/assets (such as bins and barrels) in use at the winery. Specific details of the equipment will be accessible from within the *Plant and Vessel Overview*



The *Plant and Vessel Overview* provides a tree view on the left hand side grouping all equipment in the winery by winery building or zone. The right hand side is reserved for detailed information about each equipment item including a treatment history (if applicable).



The detail pane shows extended information about the equipment. In the above screenshot you can see all the properties of a particular barrel including a usage indicator to show how full the vessel is. Below that is a link back to the wine product that the item contains – click the link to gain access to the *Product Overview*.

The treatment history provides a chronological list of all treatments have been performed on this particular item.

Treatment history			
Date	Operator	Summary	Action
09/Nov/2007 08:33		Performed ACID WASH on RW050135	View

In the above screenshot, you can see that an ACID WASH was performed on the barrel on the 9th November. By clicking the *View* link, you can gain additional information about the operation.

3.5. Winery Dashboard

The *Winery Dashboard* is a visual representation of buildings or zones within the winery. It consists of ‘tiles’ representing physical items such as tanks and barrels and aims to loosely represent their physical position within the winery zone.

You can access the *Winery Dashboard* by clicking on the following quick launch option



A typical tile for a tank looks like the following

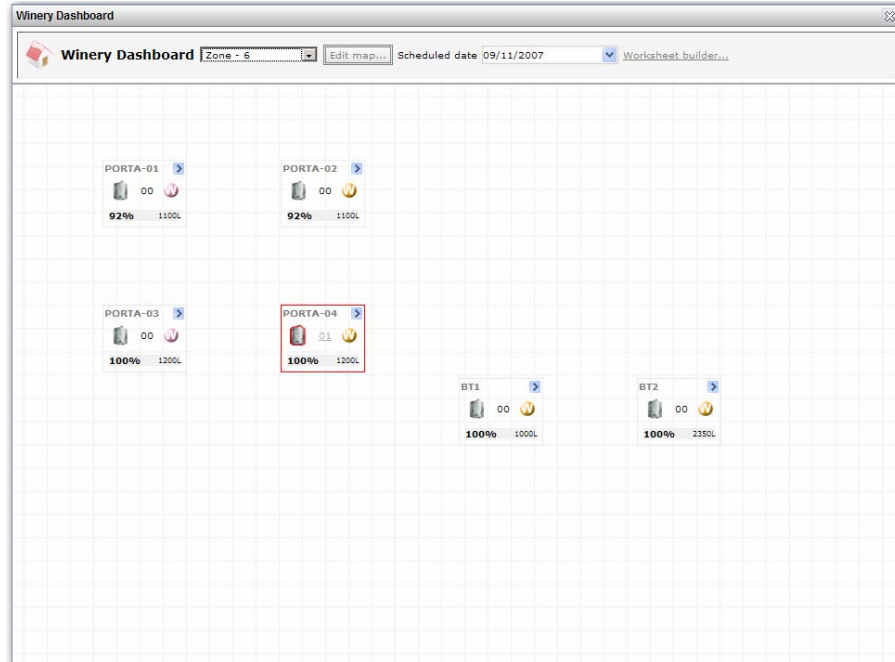


At the top is the name of the vessel, in this case PORTA-04. To the left is an icon representing a tank – the red border indicates that it is currently fermenting. The number in the middle indicates that there is 01 scheduled task for the wine product today. This is also highlighted by the red border around the tile. The icon on the right represents the type of wine product – in this case it is a white wine. The figures at the bottom of the tile represent the current utilization of the vessel (100%) and the total volume of the wine product (1200L).

You can click on the wine product icon which will take you straight to the *Product Overview* for that product.

The *Winery Dashboard* in owner-only mode will only show tiles for products or equipment that you own. You will not be able to see all items on the dashboard as they may contain products owned by others.

The dashboard itself is pictured below



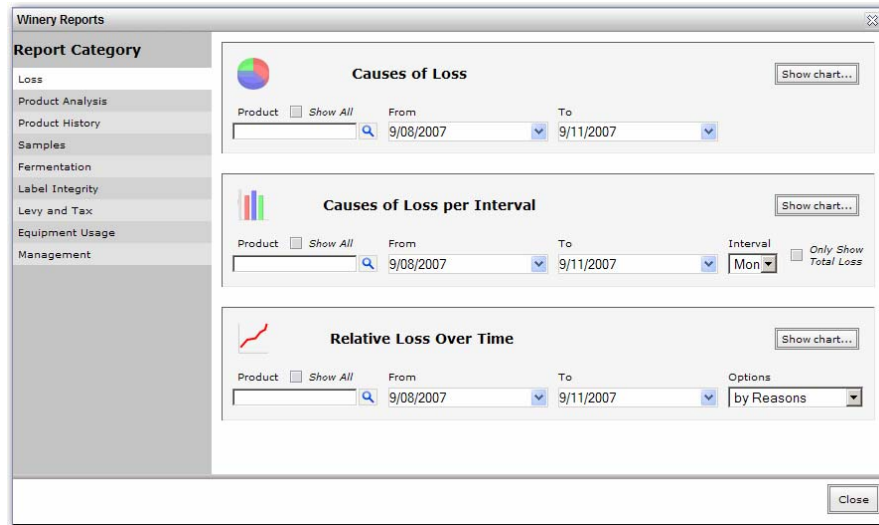
At the top of the window you can select different zones or buildings by changing the drop down. You may also change the *Scheduled date* which will highlight any scheduled tasks on wine products by placing a red border around the tile.

3.6. Reports

The *Reports* console provides access to all the reports and charts available in the system. In owner-only mode you will be restricted to the information you can report on based on the products or assets that you own. To access the *Reports* console, click the following Quick launch menu

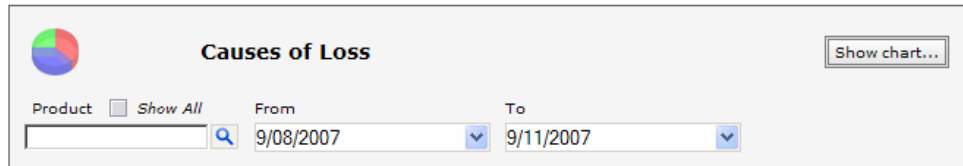


The *Reports* window provides a menu on the left that groups all reports into common areas. Each area contains multiple report 'strips' that allow you to run a different report for that report category. In the screenshot below, you can see there are several different report strips for loss.



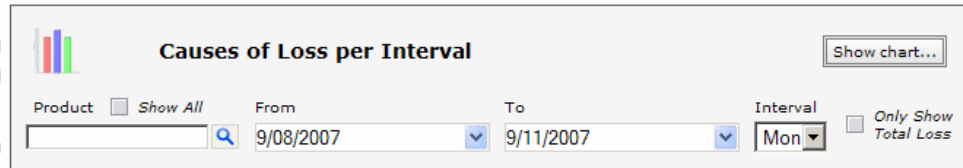
3.6.1. Loss

There are several reports that can be run to show wine product losses and gains as the result of winery operation.



Causes of Loss

This report displays a pie chart on screen with the breakdown of loss/gain by loss reason for the nominated date range. By checking the *Show All* checkbox, loss for all products will be included. Selecting a single product will show loss/gain for that product exclusively.



Causes of Loss per Interval

This report displays a bar chart on screen with the breakdown of loss/gain by loss reason and for the nominated interval. You can compare loss on a weekly, monthly or yearly basis for any date range and for any product. Check the *Show All* checkbox to loss/gain for all products.

Relative Loss Over Time

This report displays a line chart representing the accumulative amount of loss/gain overtime. There are several options to include reasons, reasons and totals and totals only. Select an individual product or check *Show All* to run the report for all products.

3.6.2. Product Analysis

Analysis Day Sheet

The analysis day sheet report prepares a PDF document listing all analysis readings recorded for wine products within the specified date range. In owner-only mode, you are restricted to preparing the report for products that are owned by you. The *Show active only* checkbox will only include wine products that have a non-zero amount (i.e. not dispatched). The *Show latest only* option will only show unique measurements per metric within the date range. For example, if there have been two recordings of pH within the report date range, then only the latest reading will be presented in the report.

Product Analysis Stack Chart

The stack chart shows individual metric readings as separate graphs ‘stacked’ on top of each other for easier correlation. Select a product that you wish to chart and the *Metrics* will be automatically populated. Check or uncheck the metrics you are interested in and optionally include weather readings from your own or BoM weather station. Click “Show chart...” to display the chart report screen. You can further manipulate the chart to add or remove metrics after it is on screen.

Product Analysis Dual Axis Chart

The dual axis chart allows you to correlate two metrics on the one axis with the option of using a weather statistics. For example, comparing pH and Humidity on the one chart. Select a product, choose a *Metric* for axis 1 and then either select a *Metric* or *Weather Statistic* for axis 2. As with the stack chart you may manipulate the chart further once displayed.

3.6.3. Product History

Operation history

The operation history report produces a PDF with details of winery activities performed on the selected wine product. You may optionally filter the report to *Show only* a particular type of winery operation, such as Additive, Transfer etc. The *Full History* option will include the complete history traced back through blends and all the way back to intake or import. Check the *Page breaks* option to display each separate product on a separate page.

The report in *Full history* mode is a “working” document. There are hyperlinks that trace the composition through blends and a “Relative %” for each input product representing the weighting that each product contributes to the final composition.

Vessel exposure history

The vessel exposure history shows a complete history of each vessel the product was exposed to including input products from blends contributing to the current composition. Select a product and click “Generate PDF...” The report shows the vessel, the dates the

product was transferred in and out, the duration and any specific characteristics of the vessel.

3.6.4. Samples

Sample Analysis Stack Chart

The sample analysis stack chart allows you to correlate analysis readings for grape samples taken as part of a sample set in the system. You may also correlate the metrics to weather readings from your own or a BoM weather station. Each metric or weather reading will be displayed in its own chart stacked on top of others.

Sample Analysis Dual Axis Chart

The dual axis version of the sample report allows you to correlate two metrics on the one chart with the option to include a weather statistic. Select the sample set, the metric for the first axis and a metric of weather statistic for the second axis.

3.6.5. Fermentation

Ferment Analysis Stack Chart

The ferment analysis chart allows you to graph multiple metric readings from an active ferment in the system. Each wine product in ferment or fermented will be available for selection. Select the ferment, the metric(s) you wish to chart and any optional weather statistics. Each metric will be presented on its own chart stacked on top of one another.

Ferment Analysis Dual Axis Chart

The ferment analysis dual axis chart allows you to correlate two metric readings on the one chart for any ferment or fermented wine product in the system. Select the ferment, metric for the first axis and a metric or weather statistic for the second axis.

3.6.6. Label Integrity

Label Integrity Statement

The label integrity statement report produces a PDF that can be signed as a declaration of the origin and composition of any wine product owned by you. Select the wine product, winemaker, customer (who the report should be addressed to), an optional order number and an optional override amount in litres. The report includes a declaration of allergens used in the making of the wine product and the LIP breakdown in both tabular and chart format.

3.6.7. Levy and Tax

Wine Grapes Levy

The wine grapes levy report overlays the Australian Government Wine Grapes Levy form required to be completed by wine producers for all fruit used in the production of wine. The system calculates the amount of fruit taken into the system for the specified owner and uses the levy tables provided by the Australian Government to calculate the levy payable. In owner-only mode the owner is restricted to your login account. Select the appropriate vintage, the type of installments, payment method and expected deposit date. The report will be completed and made available for printing and signing.

3.6.8. Equipment usage

Equipment Usage Report (Product History)

The screenshot shows a web form titled "Equipment Usage Report (Product History)". On the left is a "PDF" icon. On the right is a "Generate PDF..." button. Below the title are three input fields: "Equipment" with a search icon, "From" with a date dropdown set to "09/11/2007", and "To" with a date dropdown set to "09/11/2007".

The Equipment usage report shows a history of wine products that the selected vessel contained within the specified date range. The report shows the wine batch, its colour, the date in and out and the duration of time the wine product was in the vessel.

3.6.9. Management

Stock Report

The screenshot shows a web form titled "Stock Report". On the right is a "Generate PDF..." button. Below the title are several options: "Show Stock as of" with a date and time dropdown set to "9/11/2007 23:59:00"; "Show Composition Details" with a dropdown set to "Lip Breakdown"; "Owned by" with a dropdown set to "Red Wines"; checkboxes for "Show Individual Barrels", "Show Live Metrics", "A3 Page Size", and "Landscape" (which is checked); and a "Code filter" text input field.

The stock report is a comprehensive report capable of showing all stock on hand at any point in time. Select a date and time to show stock at that point at time and any one of the many options:

Show composition details – allows you to include an LIP breakdown or Grouped fruit origin information.

Show individual barrels – shows each barrel separately instead of in a virtual barrel group.

Show live metrics – shows the latest metric readings against each wine product in the stock report

(Code Filter) – Allows you to specify text to filter the report based on batch code. For example, if your wine batch codes included a specific code indicating the varietal of the

batch, then you could enter one of those codes here to only show batches with that text in the code. If I had codes starting with 07SHZMVL then I could enter SHZ to show me all the wine batches labeled as Shiraz.

Work Summary

The Work Summary has been designed to show a brief summary of each operation performed and any loss/gain associated to that op within any given date range. Both an opening and closing stock balance are shown as well as a loss/gain and *stock movement* – there should always be a balance between these.

Select a date range and specify the product type to run the report for. The operation summaries are optional and you can exclude them by un-checking *Show operations*. In owner-only mode the report is filtered to show only those operations performed on wine batches that you own.

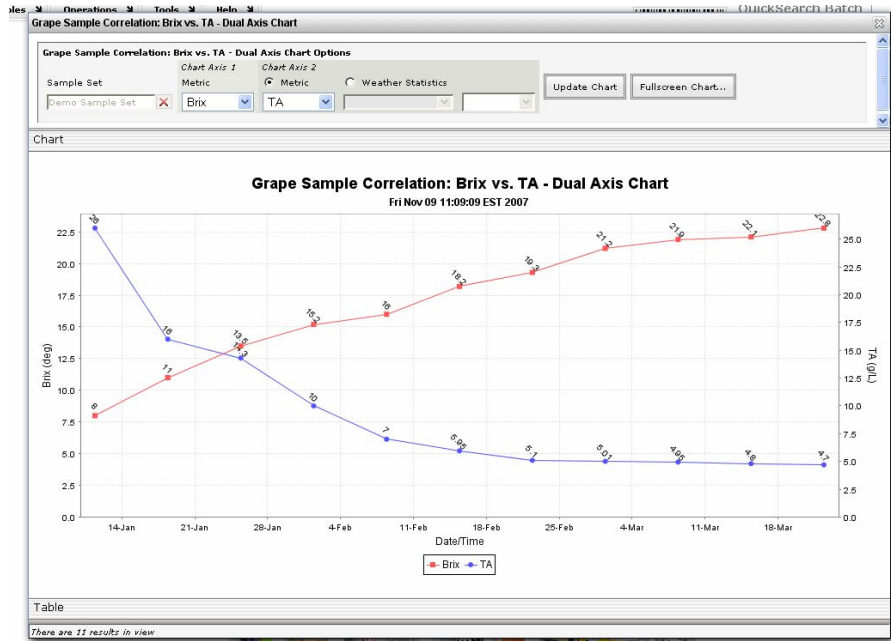
3.7. Sampling

The *Sampling* console provides quick access to all your sample sets of grapes that have entered into the system. You can access the console from the *Consoles* menu from the VINx2 Desktop.

Id	Name	Grower	Vineyard	Block	#Samples	Options
782	My Samples	Grapes R Us	RIV	RIV CAS	1	Chart...

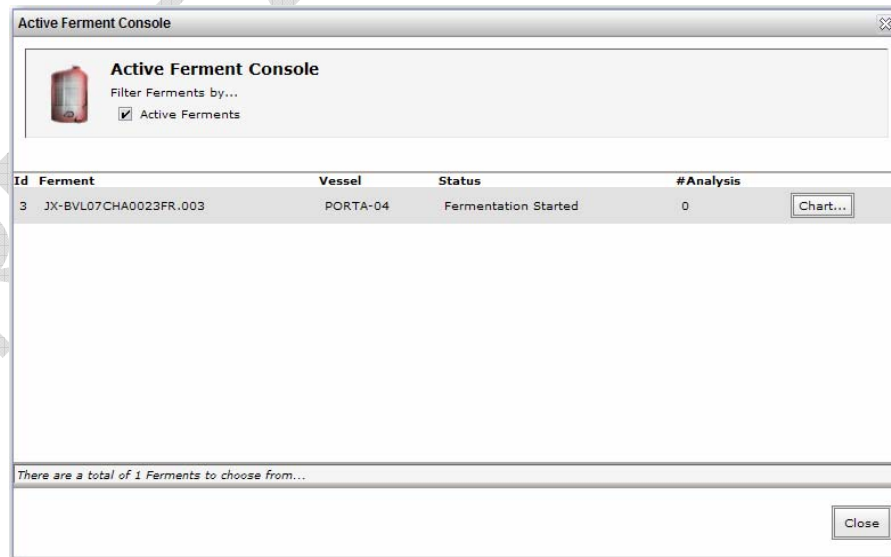
You may filter the displayed grape samples by Vintage, Grower, Vineyard and Block. In owner-only mode, only the samples for fruit that you own will be displayed. For each sample set you can see at-a-glance the sample set name, grower, vineyard, block and

total number of recorded samples. Click on the “Chart...” button to be taken into the *Samples* report menu where you can run custom reports to display chart information for the sample readings. Below is an example Dual Axis Chart showing Brix and TA.



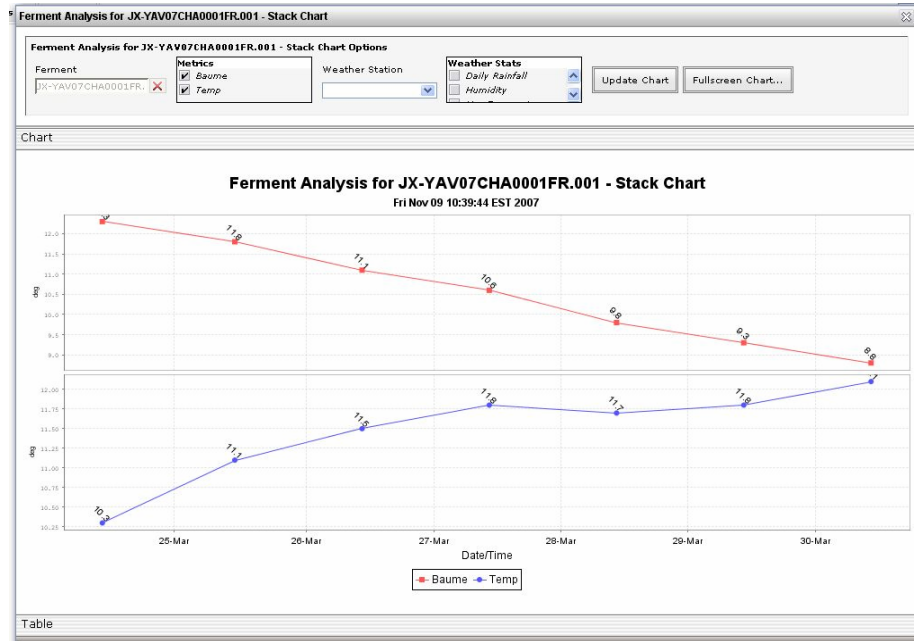
3.8. Ferments

The *Ferments* console provides quick access to all currently active ferments in the system. You can see at a glance the wine product in ferment, the vessel, the status and the total number of analysis readings recorded against the product.



The *Ferment* console also provides a convenient way to access chart reporting information by clicking the “Chart...” button. It will take you into the *Reports* console where

you can customise the chart you wish to display. Below is a sample Stack Chart showing Baume and Temp as two separate stack charts



3.9. Product search

The product search screen is accessible from the *File* menu from the VINx2 Desktop and allows you to perform an advanced search for products in the system. In owner-only

mode, it is restricted to products that you own. After selecting the search parameters you can click “Search” to query the database. Each result will be displayed in its own row showing the product type, name, description, location and current amount. You may click on the name link to be taken straight into the *Product Overview* for that wine product.

3.10. Vessel search

The screenshot shows a window titled "Vessel Search". At the top, there is a search icon and a dropdown menu for "Vessel type to search for" with "TANK" selected. Below this is a "Search criteria" section with various input fields and checkboxes:

- Name:
- Description:
- Owner:
- Location:
- Purchased Used?:
- Inactive?
- Capacity from:
- Capacity to:
- Available (L):
- Empty?
- Ullaged?
- In use?
- Refrigerated?
- Thermostat?
- Fermenter

At the bottom right of the criteria section are "Reset" and "Search" buttons. Below the criteria section, a large grey box displays "NO RESULTS (please make a selection)". At the very bottom, it says "Your search returned [0] results..." and a "Close" button is visible.

The *Vessel search* is very similar to the product search and allows you to search for Tanks or Barrels. Select the type of vessel to search for at the top and you will be presented with differing search options. Below are the search options for a barrel:

This screenshot shows the "Search criteria" section for a barrel search. It includes the following fields and options:

- Name:
- Description:
- Owner:
- Location:
- Purchased Used?:
- Inactive?
- Capacity from:
- Capacity to:
- Available (L):
- Empty?
- Ullaged?
- In use?
- Cooper:
- Forest:
- Seasoning:
- Toasting:
- Toasted heads?
- Grain:
- In Group:
- Barrel Group:

"Reset" and "Search" buttons are located at the bottom right.

Select the search criteria and click “Search” to query the database. Each result will be displayed in its own row showing vessel name, current contents, capacity and utilization. You can click the contents link to be taken straight to the *Product Overview* or the vessel name link to be taken straight to the *Plant and Vessel Overview*.