

## MATRIX-TM 4.0 Release Notes

This document summarizes the improvements and new features comparing MATRIX-TM V3.8 and V4.0

### Changes from V3.8:

Module	Feature	Description
<u>Installation</u>	Setup dialogs	On the dialog that displays the modules for installation, the option 'Install Touch' is now called 'Install Manage and Touch'.
<u>MANAGE module</u>	Menu	The structure of menu 'Order' was changed and has new options. (See more info in other features)
	Search screens	General changes and additions to search screens: 1) New columns to display the data of the records 2) New fields for searching the records 3) New options on the pop-up menus that appear by right-clicking on the record, which sends you for example to the item or bin.
		Right-click mouse button on any record will initiate a pop-up menu for that specific record.
	General	Number & Date formats will be displayed according to the Regional settings. As well, in 'Import Data' module, it is possible to import local formats, for example: for decimal numbers sign according to the local regional setting (',' or '.') in the input file.
		More messages have been added to indicate the status/problem. <u>For example:</u> Errors in sending email or order etc.
	Item Maintenance	The field ' <b>Automatic Purchase</b> ' from 'Item Maintenance' screen → 'Supplier Information' tab was removed.
	Import Data	Many improvements including: 1) Import partial data for updating only specific fields (like Item Price only). 2) Each import project is completely separated. 3) Better output for success or errors. Note: Projects made in previous versions will be deleted.
Send Email to Support	The screen 'Send Email to Support' contains now the ' <b>Email Address</b> ' field which is empty on load and ' <b>CTMS Support Address</b> ' field that contains the address available for copy.	
<u>TOUCH module</u>	Load TOUCH	If there was no cabinet attached to the current PC in the MANAGE module (Touch-Machine definitions) and the user tries to load TOUCH module, he will be notified by a suitable error message.
	Main Menu	New options 'Transfer Order' and 'Transactions' were added to

	authorizations	the Main Menu of TOUCH module (see the new features), therefore authorizations must be adjusted to the existing User Groups!!!
	Timeout and Automatic login	<p>The new system option 1008 enables defining <b>automatic logon user</b> in the MANAGE module. If a user was defined, the system will automatically login the automatic logon user in the following cases:</p> <ol style="list-style-type: none"> <li>1) The TOUCH module was just loaded.</li> <li>2) Any user exited to Login screen from his session.</li> </ol>

**New features:**

**General:**

Feature	Description
New Languages	Matrix-TM now supports 4 more languages: <b>sk</b> -Slovakian <b>hu</b> -Hungarian <b>nl</b> -Dutch <b>fi</b> -Finnish In total 20 languages are supported in MANAGE and TOUCH.
Program startup	New parameters have been added to Command Prompt line (cmd.exe) to override those in the 'Settings' program. In the command prompt login to the Matrix-TMManage directory and type Manage /? for details.

**Interfaces:**

Feature	Description
Interface between MATRIX and SAP	A new Matrix to SAP interface (MSI) is a part of this version. On the MATRIX side it is setup via the Interface Management.
Interface Management	This feature has been added to Matrix. You can define and schedule any number of interfaces. This is the infrastructure on which any interface to other systems should be maintained.

**MANAGE Module:**

Feature	Description
General	New option to cascade the open windows. See "Menu: Windows → Cascading Windows".
Search screens	New columns added to search screens: <u>For example:</u> The 'Search Items' screen – 'Barcode' column The 'Search Bins' screen – 'Do not issue' column The 'Dead Bins Report' screen – 'Bin of Used' and 'Bin of Reworked' columns The 'Basic Orders Report' screen – 'Lead Time' column The 'Scheduling Reports' screen – 'Create'/'Update' User'/'Date' columns etc
System options	<u>Option 109 - Force to issue old items before new items</u> If checked, the TOUCH module will first display only the Used / Reworked items. After these are issued, the new items will then be displayed, and can also be issued, if required.
	<u>Option 110 - Display options for partial receive</u> Display window asking to close order line or keep open when the order line is received partially. If unchecked, the order line will not be closed until fully received.
	<u>Option 111 - Number of reference fields to use on Receive</u> Number of reference fields to use on 'Receive' process for interfaces with ERP systems. For example to send ERP order and line numbers.

	<p><u>Option 112 - Type of Reference fields</u> Type of Reference fields for Interfaces: Numeric or Text.</p>
	<p><u>Option 605 - Database Auto-Backup Time</u> Time to create the backup file of the database.</p>
	<p><u>Option 707 - Use SSL</u> Use Secure Authentication. When the SMTP server requires secure authentication in sending email, this parameter must be set.</p>
	<p><u>Option 807 - Auto PO Day</u> The automatic order can run now more than once in a week by using the new options: - Monday, Wednesday and Friday - Tuesday and Thursday</p>
	<p><u>Option 810 - Critical Minimum Stock Percent</u> Percent from the Minimum stock quantity that determines the critical stock. This value is used <b>only</b> for 'Advanced Stock Shortage' reports. Stock below minimum but above this percent is considered as <b>Non-Critical</b> shortage. Stock bellow minimum and bellow this percent is considered as <b>Critical</b> shortage.</p>
	<p><u>Option 811 - Show Item Code and Description of Supplier</u> In the order printout, show Supplier Item Code and Description. It is printed below the basic Item Code and Description.</p>
	<p><u>Option 1008 - User for Automatic login</u> If a User name is specified in this system option, TOUCH will not require any login and there will be no logout after timeout.</p>
	<p><u>Option 1014 - Display options for issuing KIT</u> Display window for issuing KIT as Assembly or as Separated Items. If unchecked, kit will be issued as Separate Items and no display window will appear.</p> <p>This parameter will influence the Issue of Kit only on the TOUCH module: If the system administrator sets not to ask the operator about the issue option, the system will force the operator to issue by 'Separated Items'. Otherwise window will appear.</p>
Item Maintenance	<p>New option to set/change item image by clicking the &lt;...&gt; (Browse) button and selecting the image file.</p>
	<p>The tab 'Orders' on the 'Item Maintenance' screen now includes the 'Supplier Name' for each order line.</p>
Bin Maintenance	<p>New tab called 'Orders' is added to the 'Bin Maintenance' screen to display all the order lines created for the bin.</p>
	<p>It is possible now to update the field 'Is Send' on the 'Cabinet Unit' screen that is opened through the 'Cabinet Maintenance' screen → tab 'Bin Units' → &lt;Update&gt; button for bin unit.</p>
Supplier	<p>When updating the database or creating a new one, a new supplier called 'Internal Supplier' is added to the suppliers' list in order to support Internal Orders. This supplier is permanent and cannot be deleted from the list.</p>
	<p>New field 'Additional Supplier Code' was added to 'Supplier Maintenance' screen.</p>

	<p>New fields were added to 'Supplier Maintenance' screen in order to support automatic ordering by individual schedule for each supplier.</p> <ul style="list-style-type: none"> <li>- Schedule Type</li> <li>- Schedule Day</li> <li>- Schedule Time</li> <li>- Date Last Updated</li> </ul> <p>The day to run auto purchase can now be defined per supplier.</p>
Cabinet Maintenance	<p><b>Matrix Series 4 hardware</b> was added to the list of 'Cabinet Type' field.</p>
	<p>New pre-defined configurations of drawer were added to the list in the 'Build Drawer' screen for Matrix drawer types: D11 and D12.</p>
	<p>A new field '<b>Is Internal Order</b>' is added in order to create internal orders instead of purchase orders to this cabinet in the auto-purchase process.</p>
Drawer Type	<p>It is possible now to add new drawer type for <b>Matrix</b> and <b>Matrix Series 4</b> cabinet types as well as for Kardex and Non Automatic.</p>
Site Maintenance	<p>New field 'Contact Person' is added and is printed in the order printout in the ship to address.</p>
Cost Centers	<p>A new type of cost center called 'Barcode' was added to the field 'Manual Input Type' on the screen 'Cost Center Header Maintenance'. This will request from the user to input the value for cost center in TOUCH module using barcode reader and will not display the virtual keyboard.</p>
	<p>It is possible now to assign one cost center detail to two or more cost center details of the upper header. For example: one machine can be related to two different departments.</p>
	<p>New field 'Max Length' is added on the 'Cost Center Header Maintenance' screen to limit the input length.</p>
Interfaces	<p>New module is added to support interface between Matrix software and other systems. SAP system is one example which was implemented. The new screens are available through the menu:</p> <ul style="list-style-type: none"> <li>- Menu: Administration → Interfaces → Interfaces You can flexibly define your own fields for the interface.</li> <li>- Menu: Administration → Interfaces → Interface Scheduler</li> <li>- Menu: Administration → Interfaces → Interface Report</li> </ul>
Transactions	<p>The tab 'Cost' (previously 'PO Information' tab) on the 'Transaction Maintenance' screen includes new fields in order to support the Receive process with the interface to SAP:</p> <ul style="list-style-type: none"> <li>- Line No.</li> <li>- Reference 1</li> <li>- Reference 2</li> <li>- Reference 3</li> <li>- Reference 4</li> </ul>
Order	<p>A new search screen called '<b>Show All Orders</b>' that contains the order headers of all order types and enables to open its maintenance screen. See "Menu: Order → Order → Show All Orders".</p>
	<p>The tab '<b>Address</b>' on the 'Order Maintenance' screen has a few changes:</p> <ul style="list-style-type: none"> <li>- The four fields of supplier address were added to the tab</li> <li>- The existing 'Contact Person' field displays now the contact person of</li> </ul>

	<p><b>Supplier</b> - The 'Contact Person' field was added to display the contact person of the ordering <b>Site</b></p> <p>When printing order, new field is added '<b>Show Closed Orders</b>' to the 'Send Order' screen that enables to select if we want to include closed order lines as well.</p> <p>When printing order, new option 'No Sending' is added to the field '<b>Print Destination</b>' on the 'Send Order' screen that enables changing status of order to 'Sent to supplier' without sending the order to Print or to Email.</p> <p>The printed Order contains additional information regarding the addresses and the contact persons of Supplier and Ordering site.</p>
Internal Orders	<p>A new order type called '<b>Internal order</b>' is added to the system. It contains order lines for items that need to be transferred from cabinet to cabinet. This order type can be created manually or automatically and it has a constant supplier called 'Internal Supplier'. See "Menu: Order → Order → Internal Orders". (See more in other features)</p> <p>A new search screen called '<b>Transfer Order</b>' contains the order lines from Internal orders. Via this function you can transfer items from the source cabinet and receive them later into the destination cabinet. Each transaction will be recorded separately as a transfer (minus then plus). See "Menu: Order → Transfer Order". (See more in other features)</p>
Receive	<p>The 'Receive' screen includes new fields for information: - Used Item - Reworked</p> <p>The '<b>Receive</b>' search screen of order lines now also contains the items of Internal Orders that were previously issued by 'Transfer Order' and now are ready to be received to the destination cabinet. (See more in other features)</p>
Stock Transfer	<p>The 'Stock Transfer' screen includes new fields for information both for Source and Destination bins: - Used Item - Reworked</p>
Reports	<p>A new report of items called '<b>Item Catalog Pictures</b>' that can be exported to Excel together with its barcodes and images for use as a graphic catalog. See "Menu: Reports → Item Catalog Pictures"</p> <p>The 'Scheduled Report Maintenance' screen includes new fields: - Separator (for defining separator sign between data fields for text files) - Active (to set the report as active/inactive)</p> <p>The Scheduled Reports can be run more than once in a week by using the new options in the 'Schedule Day' field: - Monday, Wednesday and Friday - Tuesday and Thursday</p> <p>The 'Advanced Transactions Report' contains new Reference 1-4 fields for filtering the records and for display.</p>

	<p>The 'Advanced Transactions Report' now includes also the cost centers code.</p> <p>A report of 'Advanced Stock Shortage' contains new field '<b>Critical Shortage</b>' for filtering the shortage records to critical and non-critical (see also system option 810).</p> <p>A basic Stock Shortage report now also shows the cost (= Fill Quantity * Main Supplier Price).</p> <p>New report called 'Early Warning Report' added to display the items and the prognosis for how many days the stock will be sufficient based on the statistics of usage (Usage, 3 Month Average, Lead Time, Stock Days). See "Menu: Reports → Stock Shortage → Early Warning Report" This report will help you get ready and react <b>before</b> a stock-out happens.</p> <p>A 'Bin Units Report' includes also the records of: - Bin Units which are not assigned to any bin - Bin that does not have bin units</p> <p>In advanced report for additional fields (Items, Bins, Orders Lines), when setting conditions for fields of type 'Date', the input control will be also of this type.</p> <p>In the advanced reports in Chart design, the legend will also show the results in percents.</p>
Import Data	<p>When creating Import projects and adding tables to the project, only the selected tables will be displayed on the 'Tables Properties' tab.</p> <p>If the import of a project fails, it now displays more details and points to the line that caused the failure.</p> <p>It is possible not to import fields that are assigned '<b>Required</b>' by removing them from the Import table in order not to override existing data.</p> <p>By selecting USER_PROFILES table for importing users, new field <b>GROUP_NAME</b> was added to table in order to support import for User Group definition as well.</p> <p>In import project when setting default value for field, the type of '<b>Default Value</b>' control will be according to its input type. For example, in the table ENT_ITEM_MASTER the field TYPE_KEY will display a list of options.</p>

**TOUCH Module:**

Feature	Description
General	<p>A new option in MANAGE (see system option 1008) enables automatic login to TOUCH and prevents log out after timeout.</p> <p>This option gives open access to the Main Menu without requiring personal login for each User. To activate this option you need to define a User for permanent login. This will not prevent a User from exiting TOUCH and logging in under his own User name.</p> <p>Use this option cautiously since it represents a very low security level (see Changes in TOUCH module)!!! As well, all transactions will be recorded under the name of the permanent user.</p>

	<p><b>New exit button:</b> A new button on the top of each screen (with the image of a door) enables the user to exit to the <b>Main Menu</b> or to the <b>Login screen</b>. This depends on the logged-in user: If the logged-in user is defined as automatic logon user (system option 1008), the Main Menu would be shown. Otherwise, user will be logged out.</p>
	<p><b>Timeout change:</b> After the timeout on the TOUCH screens, if the logged-in user is defined as automatic logon user (system option 1008), he will not be logged out but will get back to the Main Menu screen.</p>
	<p>It is possible now to open bins that have two latches and more in the <b>Matrix</b> and <b>Matrix Series 4</b> cabinet types for supporting drawers of type D11 / D12 and future drawer configurations.</p>
Search Item	<p>A new option called <b>&lt;Advanced&gt;</b> was added to the item search screen to enable search by constant fields (Application name, Main Family, Sub-Family) and by Additional Fields that were added to the Item entity by MANAGE module. This is a very powerful narrowing search that works the same way like Excel AutoFilter.</p>
	<p>After selecting item group, the operator can then press a new button called <b>&lt;Item Image&gt;</b> in order to see images of all the items in that group. This forms a total visual image search, which can be very impressive for demonstrations.</p>
	<p>When making a search by image of item group or item, to switch over to a text search, the operator should press on the <b>&lt;Item List&gt;</b> button (previously this was called &lt;OK&gt;).</p>
Cost Centers	<p>When selecting cost centers, a new button called &lt;Clear&gt; was added to enable removing the previously selected value.</p>
	<p>If a cost center header is defined as type 'Barcode' (new feature in MANAGE module), the TOUCH interface will not have a virtual keyboard and the user will have to use a barcode reader for data input.</p>
Issue	<p>By using new System option <b>109</b>, it is possible now to hide new pieces of the selected item until all the Used or Reworked pieces of the same item have been issued. This will force the operator to issue old tools before it will display the new tools. See system option 109.</p>
	<p>By setting new System option <b>1014</b> to 'NO', Kits will always be issued as Separated Items without being asked for the issue option (as Assembly or as Separated Items?).</p>
Receive	<p>By using new system options <b>111</b> and <b>112</b>, it is possible now to send 'Receive' transactions to the SAP system. After selecting the item for Receive, the system will display a screen where the user can input the reference values. (See 'Interfaces' and 'System Options' features)</p>
	<p>By setting new System Option <b>110</b> to 'NO', the operator who receives Standard or Rework order <b>partially</b>, will not be asked if he wishes to close the order line. The order line will remain open until all pieces are received. (When receiving Internal orders, the operator will never be asked)</p>
	<p>The 'Receive' module now also displays the order lines of Internal Orders in addition to Standard and Rework orders. The order lines for Internal Orders will only be displayed after they are issued by 'Transfer Order'.</p>

	The grid that displays all the bins that can receive a selected item now also has a column called 'Bin Type' to differentiate between bins of New / Used / Reworked items.
Transactions	A new option called ' <b>Transactions</b> ' is available on the Main Menu. This option lists all the 'Issue' transactions. It allows a User authorized to operate this option to correct issue transactions by selecting a transaction and quantity and returning the item back to the bin. This saves involvement of the stock administrator via the MANAGE module. It also helps authorized Users to track issued tools that may be required elsewhere.
Transfer Order	A new option on the Main Menu that enables transferring items from cabinet to cabinet based on Internal order. The procedure is to issue the tools using the ' <b>Transfer Order</b> ' module on the source cabinet and then to receive the items using the ' <b>Receive</b> ' module on the destination cabinet.

### Database Administration:

Feature	Description
Activate Jobs	<p>A new <b>E-mail</b> button on the top of the 'Activate Jobs' was added to support easier technical support. Clicking this button will transfer the texts of the job history into the screen that enables to send it by email.</p> <p>The background jobs now show detailed error description in case they fail and this can be seen in the job history.</p>
Restore Defaults	The 'Restore Defaults' operation is blocked for replicated databases in order to protect the data from unwanted changes.
Utilities	In the feature 'Add Pictures by Items' new option ' <b>By Supplier Item Code</b> ' is added to support transfer of image files that use the supplier code as a name.
SQL script running	<p>In the feature 'SQL script running' new buttons have been added:</p> <ul style="list-style-type: none"> <li>- The button &lt;Open Script&gt; to load script from file by browse</li> <li>- The button &lt;Clear Script&gt; to clear the text</li> </ul>