

MATRIX-TM Release Notes V4.7

This document summarizes the changes and new features comparing MATRIX-TM **V4.5** and **V4.7**.

Changes from V4.5:

Module	Feature	Description
<u>Setup</u>	Update Database	The database update procedure now sets Ole Automation and xp_cmdshell to <u>True</u> while updating the DB. After the update, they are returned to their initial status. This change was required in order to enable working with database when using SQL Server 2005.
<u>MANAGE</u>	Cabinet	The following fields were removed from the Cabinet Maintenance screen: <ul style="list-style-type: none"> • Choose Bin on FIFO Rule • Show Drawer
		<u>Marking</u> the "Is Internal Order" field on the 'Cabinet Maintenance' screen will ask if you want to copy this mark also to the new 'Is Internal Order' field on the Item-Cabinet level (see Item Maintenance → Stock Management tab → Item/Cabinet level) and Bin level (see Bin Maintenance → Stock Management tab). All the changes will be entered into Stock Management table.
	Bin	<u>In previous versions</u> the "Issue Price" was automatically filled with the 'Item Price'. <u>Now</u> this field can only be inputted manually.
	Transaction	<u>In previous versions</u> in the "Search Transaction" screen if the transaction was canceled and an updated transaction was created instead, then the 'Date' of the updated transaction was equal to the 'Date' of the original transaction. <u>Now the 'Date' of the updated transaction is equal to the 'Create Date' (the date and time of change).</u>
	Serial Items and Gauges	<u>In previous versions</u> Items of types Durable / Kit / Key could have been marked as 'Serial'. <u>Now</u> only Durable items can be marked as serial.
		<u>In previous versions</u> double-click on the "Send Gauge to Calibration" screen was opening "Serial Item Maintenance" screen. <u>Now</u> it is opening "Calibration Order Maintenance" screen.
	Site Mapping	The "Site Mapping" window has been graphically changed and displays additional data fields, like: Serial, Special, Stock Management data etc. <i>See Menu: Main → Site Mapping.</i>
	System Options	System Option 215 (Ratio between stock and usage) was removed.

	<p>System Option 814 (Request date on create order line) was changed. V4.5: Order line 'Request Date' equals 'Order date'. If value=NO, then 'Request Date' will be empty. V4.7: Order line 'Request Date' is taken from header. If value=NO, then 'Request Date' will be empty. <i>See also change for Manage → Manual orders.</i></p> <p>System Option 1011 (Use Additional Item Data) was removed. When making Issue on Manage it will always show the Additional item data on grid. When making search on Touch, it will always search also into Additional item data fields.</p>
Manual orders	<p><u>In previous versions</u> when creating an order line the "Request Date" of the order line was automatically getting the current date or was left empty. Now the "Request Date" of the order line is either taken from the Request date of the header or is left empty. <i>See also change for Manage → System Option 814.</i></p>
Automatic orders	<p><u>In previous versions</u> there was no consideration in the available capacity while creating automatic order. Now if new System Option 816 is set to "Yes", then orders will not exceed the available capacity space.</p>
Monthly Process	<p>The monthly process has been optimized. This optimization dramatically improves the performance speed.</p>
User Cost Centers	<p><u>In previous versions</u> the "Default Value" field was a combo box for setting the default cost center was displayed during the Issue process on TOUCH. This field has been changed to check box marking if the current cost center added to user will be displayed as default or as one of the available cost centers for the logged in user. This change was done in order to support new feature – allowing a user a list of available cost centers and selecting one of them as a default. See also new features for Manage → User Cost Centers.</p>
Basic Reports	<p><u>In previous versions</u> Dead Items & Bins reports – if an item did not have an 'Item Price', then the 'Item Price' column showed the 'Supplier Price' instead. Now there are 3 different columns:</p> <ul style="list-style-type: none"> • Item Price, if exist • Average Cost • Supplier's price (Calculated with discounts)
Advanced Reports	<p><u>In previous versions</u> Advanced stock reports took the "Is Consignment" field from the item. Now there are two separate fields – "Bin Consignment" and "Item Consignment".</p> <p><u>In previous versions</u> the <Search> button was exporting results to Excel (if installed) and the <Print> button was exporting results to Report Viewer. Now the <Search> button was canceled. The <Print> button</p>

		<p>exports the results to Excel. The new <Report Viewer> button exports the results to Report Viewer.</p> <p>This was done to maintain consistency in all the basic search screens.</p>
<u>TOUCH</u>	Main Menu	The icons were resized and some renamed.
	Return	<p><u>In previous versions</u> the process of returning a serial item was: Choosing an item → Choosing a Bin → Choosing the serial for return.</p> <p><u>Now</u> the process is: Choosing an item → Choosing the serial for return → The bin is chosen automatically.</p>
<u>Database Administration</u>	Menu	<p>The Database Administration menu was reorganized.</p> <p>Also the option 'Utilities' was split to:</p> <ol style="list-style-type: none"> 1. <i>Database Tools</i> → <i>Network Settings</i> and; 2. <i>Manage Tools</i> → <i>Matrix Pictures</i>
<u>Registration</u>		<p><u>In previous versions</u> a registration key for a different server name would not have been saved.</p> <p><u>Now</u> you can save a registration key for a different server name. It is useful while preparing a DB for a client - being able to add the key to the DB even if it is not located on the target server.</p>

New features:

General:

Feature	Description
General	<p>Touch & Manage modules both support Windows 7 - 32 & 64 bit.</p> <p>The "Settings" program has to be run as administrator in order to function.</p> <hr/> <p>Kardex 3000 is fully supported.</p> <hr/> <p>"Alerts" is a completely new feature. You can set different alerts to be sent by mail or by file to remind a user or a group of users to perform a specific task. You can schedule it to occur every specific time period. <u>The available alerts:</u></p> <ul style="list-style-type: none"> • Check Database Maintenance • Check Stock Balance • Filter's Cleaning Reminder • Last Item's Issue • Send Gauges to Calibration Reminder <p>Create new alert in Manage Menu: Tools → Alerts → Alerts Scheduler. To view log, recording all the alerts that were sent open Menu: Tools → Alerts → Alert log.</p> <hr/> <p>"Issue Confirmation" is a completely new feature, allowing an operator to use Touch from a kiosk (without automatic cabinet or non-automatic cabinet with PC and Touch screen only) – making virtual issue transactions and then going to the warehouse manager to pick-up the tools.</p> <p>When the operator issues an item from a kiosk the 'Issue' transaction is recorded, the stock is reduced but the transaction status is unconfirmed. When going to the warehouse manager to collect the item/s, the manager can view all the items that were issued but not confirmed. Based on this view he can issue the items and mark each transaction as confirmed.</p> <p>See:</p> <ul style="list-style-type: none"> - Cabinet Maintenance → new 'Is Actual Issue' field. - Menu: Operations → new 'Issue Confirmation' view displays all the issue transactions from cabinet that is not marked with 'Is Actual Issue' and that were not yet confirmed. Double-click a specific transaction to check it as issued.
New Languages	<p>A new language is available: Ca - Catalan In total – 26 languages are supported.</p>

Interfaces:

Feature	Description
FTP Interface	New type of interface that was added to handle the import of transactions from an external system (like another ATD or handheld device). See: <i>Menu: Administration → Interfaces → Interfaces</i> <i>New features for Interfaces → Import Transactions.</i>
IMC GAL Interface	Gal interface can now be configured, so a file containing new orders, consignment issues and current stock levels can be sent by email to the IMC Company. This file can be manually loaded to Gal 6. * At the time this document was written the Gal function to import such a file is not yet ready. An announcement will be sent when this function is operational.
EXPORT Interface	New type of interface allows exporting transactions into a file according to predefined conditions. This interface can be Scheduled or defined to run Online. See Manage menu: <i>Administration → Interfaces → Interfaces</i> <i>Administration → Interfaces → Interface Scheduler</i>
Import Transactions	The "Import Data" module allows importing transactions made outside of Matrix using a new V_INTERFACE_IMPORT_LOG table available for import. A new Interface type – "FTP" was added to handle the import of these transactions. A new search screen was added to keep track of transactions that were imported to Matrix. See: <i>Menu: Tools → Import → Import Data</i> <i>Menu: Administration → Interfaces → Interfaces</i> <i>Menu: Tools → Import → Import Log</i>

Database Administration:

Feature	Description
History Data Options	It is now possible to delete old "Usage" entries.
	You can now close old orders at one time by selecting a limit date. The CLOSE option will then close all the Standard orders and Rework orders (not including Internal orders) with header status that is not 'Closed' prior to the selected limit date. * <i>The DELETE option (old option) deletes all the orders with header status Closed, including Internal orders.</i>
SQL Script Running	When using SELECT script and pressing the <View Tables> button, the regular results grid is displayed. This grid now has a new <Excel> button in the top right corner that allows exporting the results grid to excel.
	A new <Viewer> button. This is a new tool that allows you to browse the Matrix database. The viewer includes the following tabs: <ul style="list-style-type: none"> • Tables: Shows the content and structure of all the tables in the

	<p>database.</p> <ul style="list-style-type: none">• Views: Shows the content and context of all the tables in the database.• Stored Procedures: Shows the script behind all the Stored Procedures.• Jobs: Shows the history of all the jobs on the <u>server</u>. <p>All the data can be exported by clicking the <Excel> button on the top right hand corner of the screen.</p>
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MANAGE Module:

Feature	Description
General	<p>The <Save & New> button was added to all maintenance screens. This button saves the current record and opens a new record to fill.</p>
	<p>All the schedule date fields now have a new "Monday & Thursday" option. Applies to System option 807 (Auto PO Day), Supplier Schedule Day (auto order date), Report Schedule Day, Import Schedule Day and Alert Schedule Day.</p>
Search screens	<p>Queries: For all the standard search screens you can create and save queries (sets of definitions - <i>search parameters, sort, columns order and size</i>). Thus, when opening a search screen you will be able to switch between different saved search queries that display records according to the saved definitions. These queries are created per logged in user and are only viewable by that user. <i>To create a new query: open a standard search screen; click the little arrow on the top left side of the window to open the query section; use the new buttons to create and name the query; design the query; and Save.</i></p>
	<p>Exporting search screen records to Excel - Excel now displays the same column size as set in Manage.</p>
Supplier	<p>The "Supplier Maintenance" screen has a new "Freight" field. When creating an order the supplier's freight price value will be used in the order.</p>
Cabinet	<p>New Drawer types are supported for Matrix & Matrix Series 4 cabinets: D-13, D-14, D-15 (special drawer types only subject to quotation).</p>
Item Maintenance	<p>A new "Alternative" tab to define a list of alternative items for the current item. Once defined, on TOUCH:</p> <ol style="list-style-type: none"> 1. The "Item Information" screen will display the list of alternative items on the new "Alternative" tab. 2. During the "Issue" process if a user selects an item which is out of stock he will get the regular 'Item Stock Situation' window and there will be an additional <Alternative> button. Pressing this button will display the list of alternative items that will be available for the standard Issue process. <p><i>See also Menu: Reports → Items → Alternative Items Report.</i></p>
Bins	<p>The "Bin Maintenance" screen → "Stock management" tab has a new 'Is Internal Order' field. When marked, the automatic process will create only internal orders for this bin.</p>
System Tables	<p>Item Group: The "Item Group Maintenance" screen now displays the picture of the item group. The new "... " button next to the picture allows you to choose an image from a file.</p>
	<p>Site: The "Site Maintenance" window has a new 'E-mail' field.</p>
	<p>Budget Groups: In <u>previous versions</u> Budget Groups were set with list of items and the allowed quantity for each item. Now you can select for each item whether to set the budget by quantity or</p>

	<p>amount. See <i>Menu: System Tables → Budget Group → add group and add item to group → select the option "Item Quantity for Issue" (old option) or "Budget Amount for Issue" (new option).</i></p>
Serial Items	<p>New fields were added to the "Serial Item Maintenance" general tab :</p> <ol style="list-style-type: none"> 1. "Status modified by" – indicates who was the last user to make changes in the serial item's status. 2. "In Stock" – indicates whether an item is considered in stock or not (according to the status the item was set to).
	<p>"Stock Count" now supports bins with serial items. When choosing a bin containing serial items a dialog box will open which enables you to change the status of every serial item in the bin.</p>
Item Type -Gauge	<p>Gauge calibration intervals can now be set to one of the following:</p> <ul style="list-style-type: none"> • A time period (Days, Months, Years). • Number of issues • Time period AND number of issues • Time period OR number of issues <p>All the options are available in the interval drop down list, in: Item Maintenance → Gauge tab; and in: Serial item → Calibration history tab.</p>
	<p>New fields were added to the Item Maintenance → 'Gauge' tab:</p> <ul style="list-style-type: none"> - Issues Interval: Number of recommended issues between calibrations. Used if the 'Interval Type' is of one of the Issues type. - Price: The price of the calibration that will be calculated into the "Return from calibration" transaction. - Tolerance for number of Days: Tolerance for calibration.
	<p>New "Return from calibration" window that allows you to return serial items that were sent to calibration. Choosing an item opens the "Calibration Order Maintenance" screen, allowing you to enter the calibration results and return the item into stock. <i>See Menu: Operations → Gauges → Return from calibration.</i></p>
System options	<p>System Option 816: "Never order more than capacity". If the option is marked as "Yes", the system will never order more items than the available capacity.</p>
	<p>System Option 406: "Path for Alerts reports" Contains the path for the Alert template.</p>
	<p>System Option 1016: "Link Address in Touch" Contains the link address for the icon on the top of the TOUCH screen (usually set for the ITA website but can be linked to the e-catalog for other IMC companies).</p>
	<p>System Option 1017: "Link Icon" Contains the path for the Icon on the top of the TOUCH screen (usually set for the ITA website but other icons can be fixed as the case requires).</p>
	<p>System Option 1018: "Link Keyboard Type" Determines the type of keyboard (Numeric, Alpha) to be used for the website that is opened using the link on the top of the page (defined by system option 1016).</p>
	<p>System Option 1019: "Show all items on Items list" Determines whether a user can view all the items on the "Item Information"</p>

	<p>screen or just the ones that are connected to the same Touch station.</p> <p>System Option 1020: "Number of days for 'Favorites' list" All the items issued during this number of recent days will be added to the 'Favorites' list on Touch.</p>
Transactions	<p>Transactions now include a 'From' field indicating the source of the transaction (Manage or Touch or Import)</p>
Stock Management	<p><u>In previous versions</u> Matrix was recording 'Issued Quantity' (amount of issued items that are usually expected to be returned to stock) only for Durable items. <u>Now</u> Matrix is recording this data for Durable, Reworkable and Gauge items. This change will influence the 'Return' process while system option 113 (Return Only Issued Items) is set to 'Yes'.</p>
Manual orders	<p><u>In previous versions</u> in order to cancel an entire order you had to close each line separately. <u>Now</u> the order header has a new status "Cancel". Changing the status of the order header to "Cancel" will cancel all of the "Open" lines in the order. Lines with status "Partial" will be closed. Closed lines will remain closed.</p>
	<p>The 'Freight' field was added to orders. The price is taken from "Supplier Maintenance" screen and is added to the total value of the order.</p>
	<p>Order printout can now display Cabinet Code and Bin Code values. To have this data you need to edit your order template file – this is recommended for advanced users only! <i>See the C:\Program Files\MATRIX-TM 4.7\ReportTemplates\Generic Order Report.doc that lists the fields available for adding. Use the external C:\Program Files\MATRIX-TM 4.7\Application\User Report Designer.exe program to edit the template.</i></p>
Cost Centers	<p>Cost Center Headers: The "Cost Center Header Maintenance" screen has a new 'Check value by list' field. This field is used for cost center header of Manual Input type (numeric, alpha-numeric, barcode). You can enter a list of valid values into cost center details list and mark the header with 'Check value by list' field. When user inputs manual value on 'Issue' process on TOUCH (without seeing the list), the input will be checked against the list of valid values. Value not in the list will be rejected and user will be notified with error.</p>
	<p>Cost Center Details: The "Cost Center Header Maintenance" screen has a new "Is Active" field. The default is 'Yes'. When set to 'No', the cost center cannot be used anymore. This field can be imported for easily canceling old cost centers.</p>
	<p>User Cost Centers: <u>Previously</u> you could define only one cost center for header for user. If the header was not marked with 'Is Changeable', then the user could not use any other cost center. <u>Now</u> you can add several cost centers that will be available for each user on the 'Issue' process on TOUCH and mark one of them as default by 'Is Default' field. <i>See also changes for Manage → User Cost Centers.</i></p>
Users and User Groups	<p>User: The "User Maintenance" screen has a new 'Supplier Name' field. This field displays a list of suppliers. If a specific supplier is selected, the user will only be able to receive orders for</p>

	<p>this supplier. This option facilitates different suppliers refilling MATRIX with their items only.</p> <p>User Group: The “User Group Maintenance” screen has a new 'Ignore System Option 109' field. When it is checked, users in this group can issue new items before used items even if System Option 109 is set to 'Yes'. Created as a solution to avoid this limit for administrative user groups.</p> <p>User Group: The “User Group Maintenance” screen has a new 'Bin Limitation' field. You can now limit a user group to issue from and return to specific bins only. Check this field and choose the bins you want to associate to the group. Once associated, users from this group can issue from and return to <u>only these bins</u> (on TOUCH). See also: <ul style="list-style-type: none"> • <i>Bin Maintenance</i> → <i>Authorizations</i> tab to view user groups associated to a bin. • <i>Reports</i> → <i>Administration</i> → '<i>Bin Limitation</i>' report </p>
Analyzer	<p>There are new windows available for display on Analyzer (total of 13 frames):</p> <ul style="list-style-type: none"> - Top Cost Centers - Top Items <p>Each Analyzer window is linked to a matching report. Clicking the header of the window will open the report.</p> <p>You can save the Analyzer window to a picture file by clicking on the <Save As> button on the top right corner of the Analyzer.</p> <p>There is a new mechanism for changing window positions and parameters. To open the window settings, click the <Update> button on the top right corner of Analyzer. Choosing a window name from the list and clicking the <Update> button opens the different parameters for that window.</p>
Basic Reports	<p>New "Item Catalog Pictures by Cabinet" report was added. The report lists the items together with its cabinet location in order to export the list to Items Catalogue per cabinet. <i>See Menu: Reports</i> → <i>Items</i> → <i>Item Catalog Pictures by Cabinet</i>.</p> <p>New "Alternative Items Report" was added. This report shows items and their alternatives, according to the new feature. <i>See new features for Manage module</i> → <i>Item Maintenance</i> screen. <i>See Menu: Reports</i> → <i>Items</i> → <i>Alternative Items Report</i>.</p> <p>New "User Groups" report was added. The report shows all the links between users and user groups. This report allows you to delete single and multiple links by using the CTRL button. <i>See Menu: Reports</i> → <i>Administration</i> → <i>User Groups</i>.</p> <p>New "Bin Limitation" report was added. The report shows all the links between bins and user groups. This report allows you to delete single and multiple links by using the CTRL button. <i>See Menu: Reports</i> → <i>Administration</i> → <i>Bin Limitation</i>.</p> <p>New "Links Report" was added. It includes all the links (usually links to files) that were added to any entity (Items, Orders etc.). <i>See Menu: Reports</i> → <i>Link Report</i>.</p>

	<p>The History Log now keeps track on user logging in and out of the system.</p>
Advanced Reports	<p>In <u>previous versions</u> changing the name of a saved advanced report would create an additional report with the new name. <u>Now</u> you can change the name of an existing report by Menu: Reports → Saved Advanced Reports → double click report for name change.</p> <p>Save/Load report template: You can now save the report template parameters to a file by the new <Save> button. The template can be later loaded from a file using the new <Load> button on the same database or at any copy of the same database. This was developed to make it easier to support a customer by sending him a prepared template file that he can load on his database.</p> <p>In advanced reports the "Choose Fields" tab now includes a 'Field Width' column. This field determines the column width when the report is printed to Excel.</p> <p>The "Advanced Stock Report" now includes the following fields:</p> <ul style="list-style-type: none"> - Group Description (Item Group) - Average cost - Item management level <p>New "Advanced early warning" report was added. This report displays 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). This report will help you get ready and react before a delivery problem happens.</p> <p>The 'Additional Item Description' field was added to:</p> <ul style="list-style-type: none"> • Advanced transaction report • Advance order report
Import Data	<p>Serial Items import is now available. Table name: V_IMPORT_SERIALS</p> <p>Item Gauge (The details from an item gauge tab) import is now available. Table name: ENT_ITEM_GUAGE</p> <p>A new import table was added to handle the import of transactions. Table name: V_INTERFACE_IMPORT_LOG</p> <p>Alternative Items import is now available. Table name: ENT_ITEM_ALTERNATIVE</p> <p>User Cost Centers import is now available. Table name: TVL_USER_COST_CENTERS</p>

TOUCH Module:

Feature	Description
General	The "Virtual Machine" window ("close drawer" window) displayed when opening a bin has an additional <Remark> button to enter remarks into transaction.
	The Issue and Return search screens have a new <Favorites> button. Pressing the button will filter the list of items to those items issued by the current user in the last X days. (The number of days is defined in system option 1020)
Issue	Multiple item selection is available. Choosing an item and pressing the "+" button will add the chosen quantity to the "Cart" . After choosing the items you can view them (By pressing the "Cart" button) and issue all of them together.
	The "Issue" search screen has a new <Favorites> button. See new features for TOUCH module → General.
Receive	If a user has a supplier he is linked to (Via the user maintenance window) he can only receive orders that were ordered from the same supplier.
Return	While system option 113 (Return Only Issued Items) is set to 'Yes', it will display not only the Durable items but also the Reworkable and Gauge items that have 'Issued Quantity' more than 0. <i>See also New features for Manage → Stock Management.</i>
	The "Return" search screen has a new <Favorites> button. See new features for TOUCH module → General.
	A new option to Scrap an item. After selecting the item to be returned (scrapped), under the bin grid there is a new <Scrap> button. To scrap an item set the quantity to scrap, press the <Scrap> button, enter scrap reason and/or remark and confirm the operation. This will create 'Return To Cabinet' and 'Scrap' transactions.
Count Bins	A new option to open at one time all the bins containing the same selected item. When selecting bin, continue to open, a new window is displayed with the following options: <ul style="list-style-type: none"> • Open Current bin • Open all bins on current drawer (default) • Open bins with the same item on current drawer (new option)
Serial Items	The "Count Bins" And "Adjust Items" modules now support serial items. In each of the modules attempting to change the Quantity field while the drawer is open opens a window allowing you to manage the statuses of every serial item in the bin.
Gauges	"Send to Calibration" module was added. Access is available via Gauges → Send to calibration. In this screen you can view all the items which are due for calibration. "All" button enables you to view even items that didn't reach their calibration limit. After choosing a serial item, you can open the drawer and send it to calibration.
	"Return from Calibration" module was added. Access is available via Gauges → Return from calibration. This screen shows all the serial items that were sent to calibration. Choosing an item and proceeding enables you to return the item into stock. The "Update" button makes it possible to specify the

	date of the calibration and the date for the next calibration.
Item Information	On the Touch screen header bar there is an "I" button that opens the new "Item Information" search screen. On this screen you can search for items and view item maintenance information (Even from other cabinets if option 1019 is set to "Yes"). After choosing an item a general "Item Information" window appears with tabs, showing the item's information.
Local Information	The "Site Mapping" tab on the Local Information window (right click on Main Menu) displays additional data fields, like: Serial, Special, etc.