AXIS Diplomat 2004

New Features Overview

Release Date: 1st July 2004

Introduction

This document outlines just some of the major benefits that you can expect to see by upgrading to AXIS Diplomat 2004 from the previous edition of software, AXIS Diplomat 2000SE (Second Edition).

This list is by no means exhaustive and AXIS Diplomat 2004 will continue to evolve after the initial release in the form of on-going level updates; please check with the Axis First web site at http://www.axisfirst.co.uk/diplomat2004 for the latest product information. Please remember too that level upgrades within the AXIS Diplomat 2004 release will be free to all of those users with current support contracts.

The key highlights are:

- **500% Performance Improvement** over previous versions via the use of roll-forward data protection instead of roll -back data protection.
- **Much Greater Control** over access to AXIS Diplomat 2004 data via the use of Security Permissions, for example the ability to remove stock pricing information from specified operators.
- **Improved Functionality** with the ability, for example, to create or amend quotations and/or sales orders within Customer Enquiry (subject to the appropriate Security Permissions and appropriate modules being available).
- **Improved Ease of Use** with, for example, the ability for operators to create and organise favourites (shorthand) and to drag-and-drop favourites to the Desktop or into interactive documents.
- **Increased Availability** with, for example, the Multi-User Posting functions which mean that there are fewer requirements for single-user mode operations.

These, and other, enhancements are described in more depth below:

Section A : System Enhancements

A1.   New Windows XP-Style Scheduler

The AXIS Diplomat 2004 Scheduler has been re-worked to provide an XP-style interface which is both easier to use and more functional (see screenshot below). Both the toolbar and icons have been redesigned to be clearer and easier to understand.
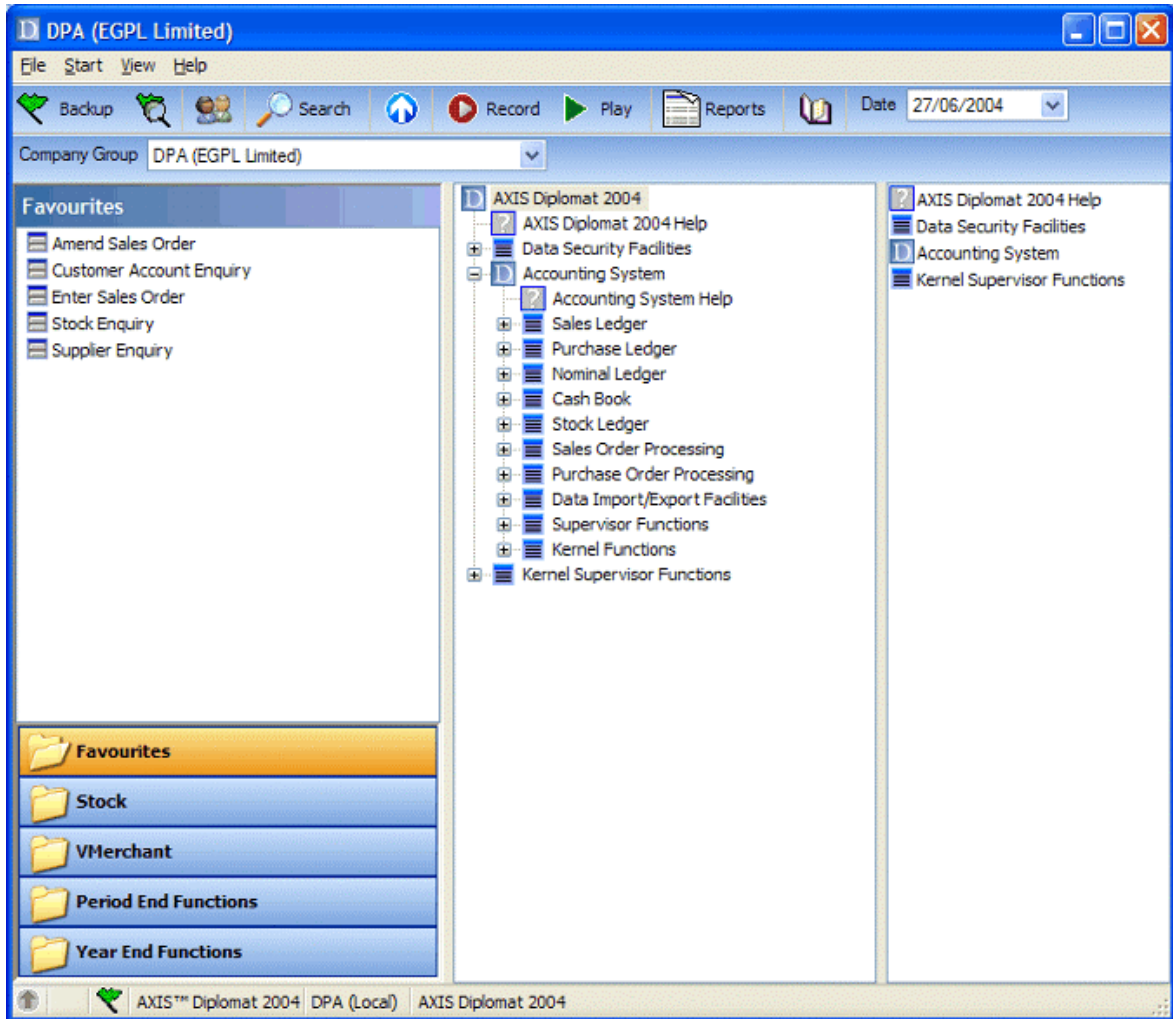
Figure 1 - AXIS Diplomat 2004 Scheduler

A2. Favourites

The operation of favourites (known as Shorthand in previous releases) has been greatly improved. As can be seen in the screenshot above, favourites can now be re-ordered into any sequence and divided into sub-groups. In addition, the following functionality has also been added:

- Operators can re-arrange favourites into whatever order they prefer, or find more logical, and rename them if they choose. For example, an operator may prefer to call an "Advice/Packing Note" a "Picking Note".
- Operators can divide favourites into sub-groups.
- Administrators can copy, create and delete favourites for other operators.
- Desktop Shortcuts can be created to load directly into specific functions (without even the need to load AXIS Diplomat 2004 beforehand). These are created by simply dragging-and-dropping the function from within the Scheduler explorer pane onto the desktop.
- AXIS Diplomat 2004 Favourites can be added to interactive documents (such as Microsoft Word™) using drag-and-drop.

These additions allow the operators to more quickly locate functions that they use on a regular basis, whilst simplifying the system for operators that only use the system infrequently. If, for example, an operator only needs to use the Stock Enquiry function, an icon can be added to their desktop which takes them immediately into that function, without the need to load AXIS Diplomat 2004 first.

A3.   Security Permissions

In previous versions of AXIS Diplomat, administrators have been able to restrict the functions that a particular operator, or group of operators, can use. This has been achieved using a facility known as Operator Privacy, which allows menu entries to be removed at an operator, group or system-wide level.

AXIS Diplomat 2004 supplements this with a new concept – Security Permissions – which extends the security capabilities even further. The system now defines a number of separate types of data. Operators and groups can be defined as having read (enquiry), amendment, creation (addition) and/or deletion rights on those types of data.

For example, a customer account is defined as having a number of subsidiary data types, such as Account Balance, Pricing, Contact and Call Details. Information that a particular operator is not allowed to see is simply hidden from the appropriate functions and, in edit mode, certain fields will be locked.
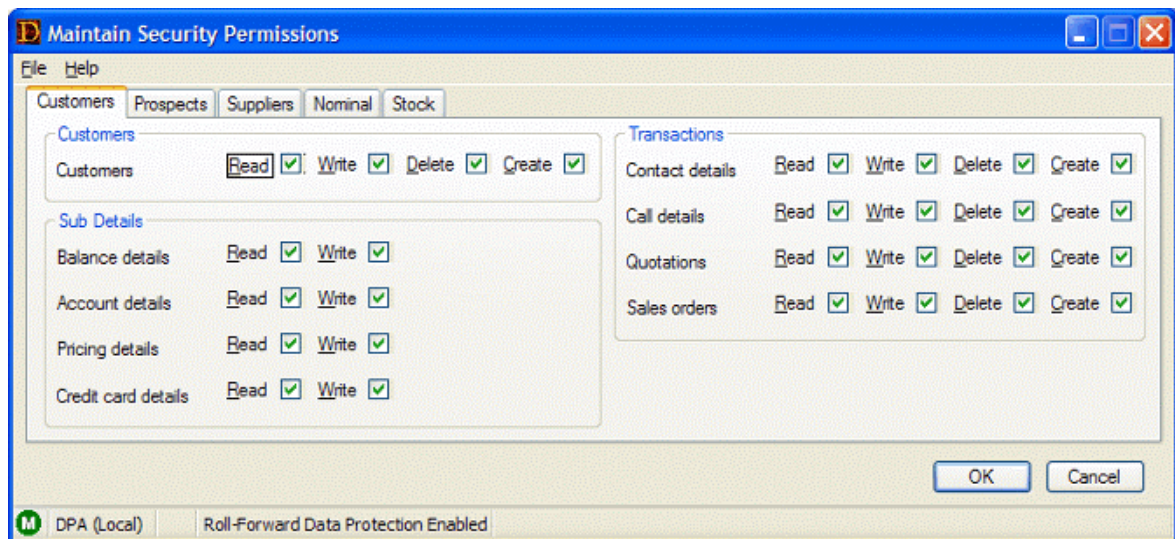

Figure 2 - Maintain Security Permissions

An operator can, for example, be allowed full, unrestricted access to the Customer Account Enquiry function as in the screen shot below:
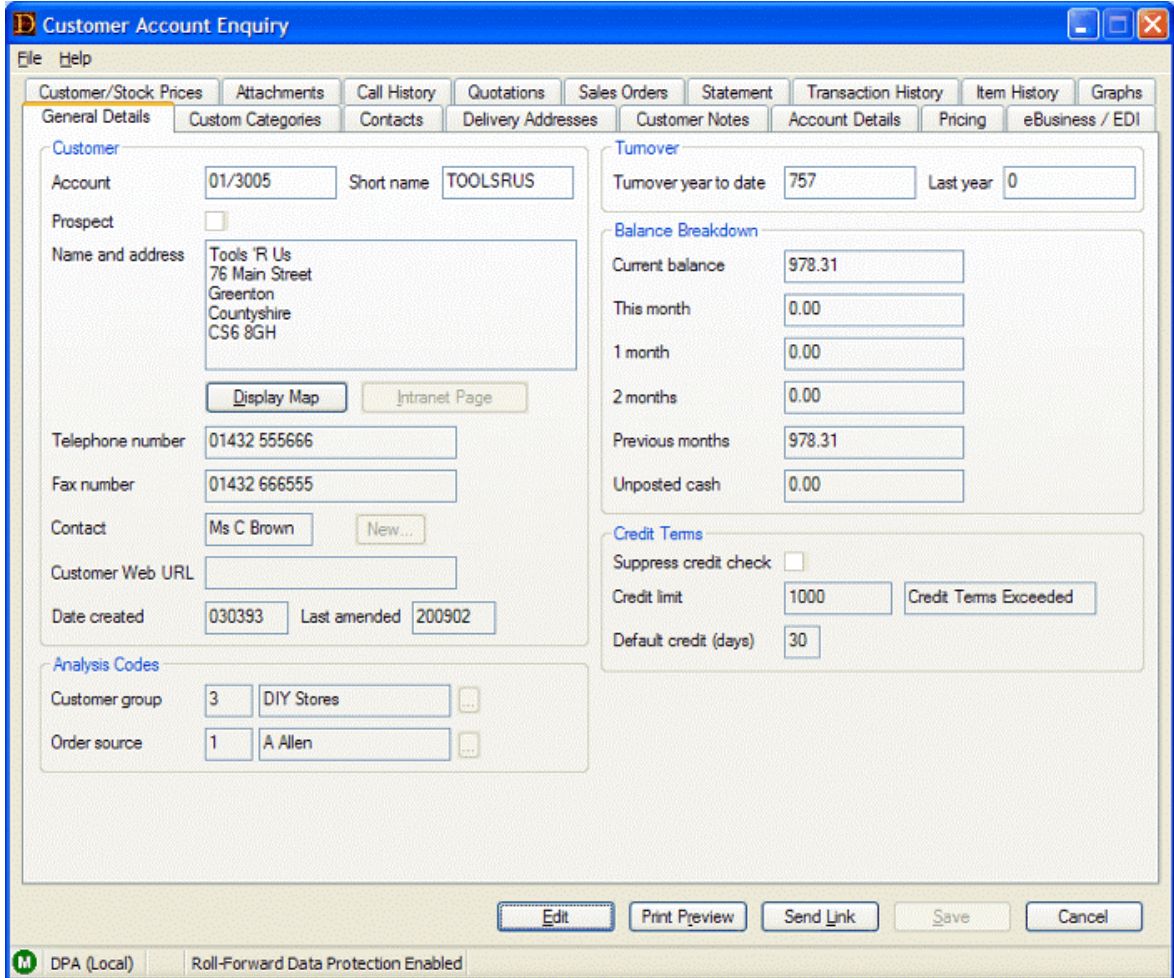
Figure 3 - Customer Account Enquiry with no Security Permissions restrictions in force

Another operator, however, might be given limited access since they have no need to access financial, historical or pricing information relating to that customer. The same function, for the same customer, seen by this other operator would be as shown below:
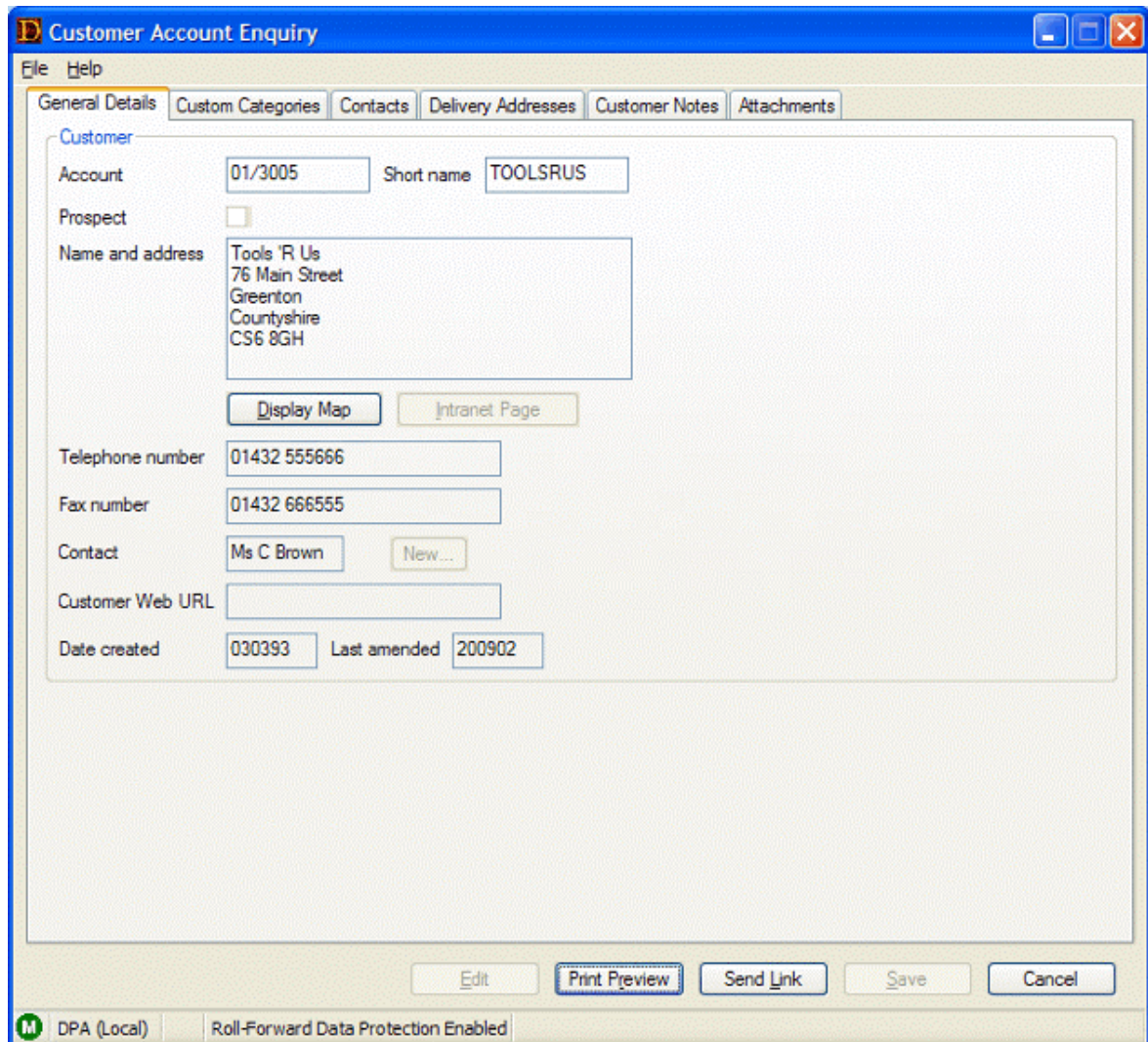
Figure 4 - Customer Account Enquiry with Security Permissions set

Notice, for example, that in addition to the function having fewer data fields and fewer tabs, the Edit button, is also disabled. Not only does this help improve security on the system but it also makes the system easier to use by removing unnecessary information from those operators that do not need it.

This has also allowed AXIS Diplomat 2004 to introduce much greater drill-down capability within functions without affecting security. It is now possible, for example, to allow creation of sales orders and quotations from within Customer Enquiry (provided the Sales Order Processing module is available) since access to this functionality is controlled by the Administrator using Security Permissions.

A4. Adobe Acrobat PDF Report Viewing Option

An additional toolbar icon within the AXIS Diplomat 2004 document preview allows the report or document to be saved in PDF format. Adobe Acrobat PDF format is the de facto standard for exchanging printable documents. Adobe Acrobat PDF Viewers are available for a wide range of environments, including non-Windows based platforms such as Apple Mac. PDF files may also be emailed directly from within the viewer.

The use of PDF format means that it is now much easier to send documents, such as Purchase Orders and Order Acknowledgements to other organisations whilst ensuring that the correct document format is preserved.

A5. Graphical Document Backgrounds

It is now possible to create full colour graphical backgrounds, containing for example your company logo, onto which documents are then overlaid.

Used in conjunction with the Adobe PDF creation outlined above, this means that you can now email documents straight from your desktop which preserve all of your corporate identity. The background can be designed to fill the full page and so can include, for example, column headings and footer information in whatever font, colour and position that you choose. Different backgrounds can be defined for each document (such as Sales Invoice, Delivery Note, Credit Note, etc.)

Businesses who do not wish to stock pre-printed stationery can also use this option to print their own documents, straight from their AXIS Diplomat 2004 system, onto plain paper but complete with their own logo.
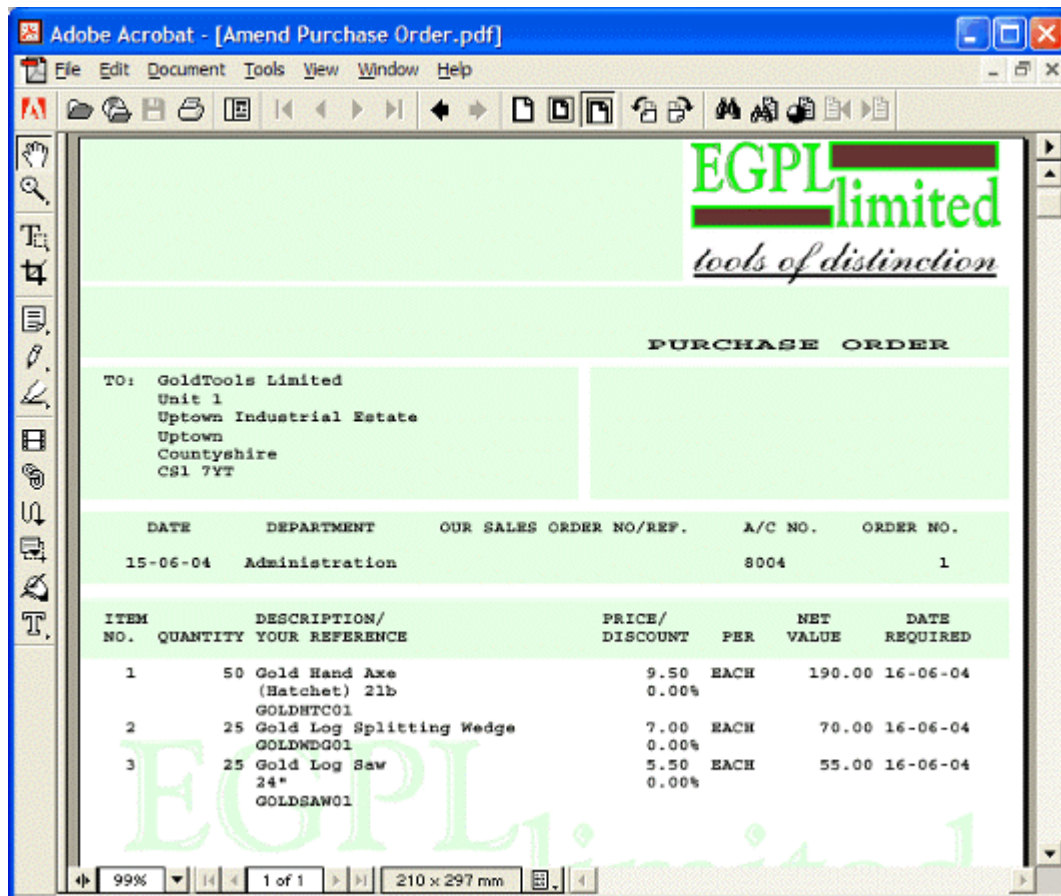

Figure 5 - Document exported from AXIS Diplomat 2004 as a PDF, with graphical document background

A6. System Console

The existing Company User Status Enquiry and System User Status Enquiry have been replaced by a single function, the System Console. The System Console provides

- the ability to send notification messages to a user or all users.
- the ability to terminate all or selected operator sessions.

This function greatly enhances the facilities available to the Administrator in managing the day-to-day operation of the system.
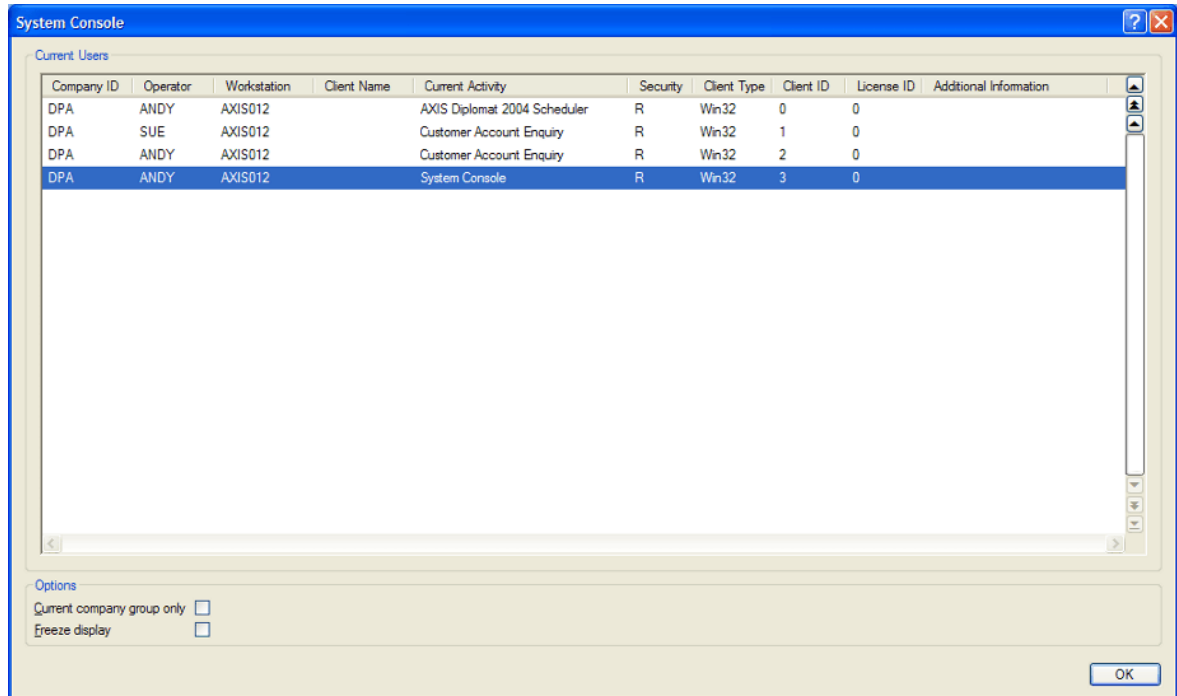

Figure 6- System Console

A7. Shortcut Keys

Users can now associate functions (such as Customer Enquiry, for example) with particular function keys. Hitting the function key will invoke that function from anywhere within the system. Moreover, these Shortcuts are company-specific, so if you are running multiple AXIS Diplomat companies, then, for example, function key F11 can launch the Stock Enquiry for company CO3, even if the operator is not currently within the CO3 company.

Users are able to define shortcut keys by simply right-clicking on the function with the AXIS Diplomat 2004 explorer pane.

A8. User-Configurable Colour Schemes

By allowing an operator to define different colour schemes for different AXIS Diplomat companies, they can achieve instant on-screen recognition of which company they are currently working in. This helps eliminate confusion when one operator works in more than one company.

A9. Roll-Forward Data Protection

AXIS Diplomat has featured Roll-Back Data Protection for many years. This means that, in the event of a system failure (or operator error), it is possible to Roll-Back (or

"undo") from the current position back to a given point in time (as defined by the Checkpoints on the system).

Roll-Back data protection is still available within AXIS Diplomat 2004 but there is a new option; Roll-Forward Data Protection.

Roll-Forward data protection works differently – in the event of a failure, the operator restores from the most recent full AXIS Diplomat backup and the data is then automatically re-instated from that point up to the point of the selected checkpoint.

The net result is the same – the system is taken back in time to the point of the selected checkpoint – the difference lies in the performance. In order to provide Roll-Back data protection, the system must ensure that every update reaches the hard disk immediately (in case of power failure), which effectively negates some of the optimization that will occur with optimised disk systems. This performance gain is most noticeable when performing complex updates to the system, such as filing a sales order, posting and period end functions, but can be seen throughout the system.

Axis First' benchmarks (all carried out using the same large 200 line sales order) show for example:

With Roll-Back Data Protection (using AXIS Diplomat 2000SE):

Filing one sales order – on a local system takes 12 seconds
Filing one sales order – on a network system takes 17 seconds

With Roll-Forward Data Protection (using AXIS Diplomat 2004):

Filing one sales order – on a local system takes 2 seconds – **performance increase of 600%**
Filing one sales order – on a network system takes 3 seconds – **performance increase of 550%**

A10. Flexible Operating Folder for Server-Based Installations

The requirement for AXIS Diplomat to run from a specific folder structure (namely \AXIS2000 and \AXIS7 at previous releases) has been removed. This means that, in particular, it is no longer necessary to share the root of the drive on which AXIS Diplomat has been installed. Whilst it is still the recommendation of Axis First that AXIS Diplomat be installed on its own partition (primarily for security and to simplify system support) this is no longer a specific requirement. This will simplify the installation of AXIS Diplomat 2004, particularly when installing onto existing servers.

Section B : AXIS Diplomat 2004 Accounts Enhancements

B1. XML

AXIS Diplomat 2004 is XML-ready. The internal architecture has been re-engineered with XML as a core objective, which means that adding support for additional XML document types is now very straightforward.

XML is a development of the web-based technology HTML and is a mechanism for defining documents to be passed from one computer system to another. Since it typically uses the Internet to pass these documents, XML will replace other vendor-specific EDI technologies as the means for passing electronic documents such as purchase orders and invoices between customers and suppliers.

Whilst XML defines the way in which these documents are formatted, it does not define their make-up or structure. Independent bodies are defining documents but a multitude of standards (or variations on standards) are currently emerging and many are specific to certain marketplaces.

The structure of AXIS Diplomat 2004 allows support for these variations to be added more easily and can therefore allow an AXIS Diplomat 2004 to exchange electronic documents with customers and/or suppliers. Since there are currently no standards (or rather too many!) any requirement will need to be looked at by your AXIS Diplomat supplier on a case-by-case basis.

XML defines the structure of the electronic document but not the mechanism for transferring that document between two organisations. Some XML adopters are using email to send files, others are posting the documents to their web site, where the recipient can download the file whilst others are uploading the file to the recipients web site via FTP. Theoretically, a document could also be written to a floppy disk or CD and posted to the recipient and still conform to XML. This means that, in addition to ensuring that AXIS Diplomat 2004 can send or receive the appropriate XML document formats, you will also need to ensure that you have the technology in place to handle the physical transportation of the electronic documents.

B2. Real-Time Sales Ledger Posting

Cash Received and Invoice/Credit Note production routines have been modified to optionally post transactions in real-time, bringing Customer Account information up-to-date immediately.

B3. Customer Account Enquiry Enhancements

The Customer Account Enquiry has now been enhanced with many additional areas of information. This has been made possible by the development of the Security Permissions facility described above since, if it is not desirable for an operator to be allowed to see any of this additional information, it can be hidden for that operator.

Information accessible via the Customer Account Enquiry now includes:

Company Web Site Address (with one-click link to that site)
Customer/Stock Pricing

Document Attachments (see below for more information)
Analysis Graphs
Amendment, Creation and Printing of Quotations (subject to the Sales Order Processing module being available)
Amendment, Creation and Printing of Sales Orders (subject to the Sales Order Processing module being available)

A new tab, for example, on the Customer Account Enquiry, entitled "Graphs" gives access to a host of graphical analysis, allowing the trading details for the previous twenty four months to be seen quickly and easily (see screenshot below):
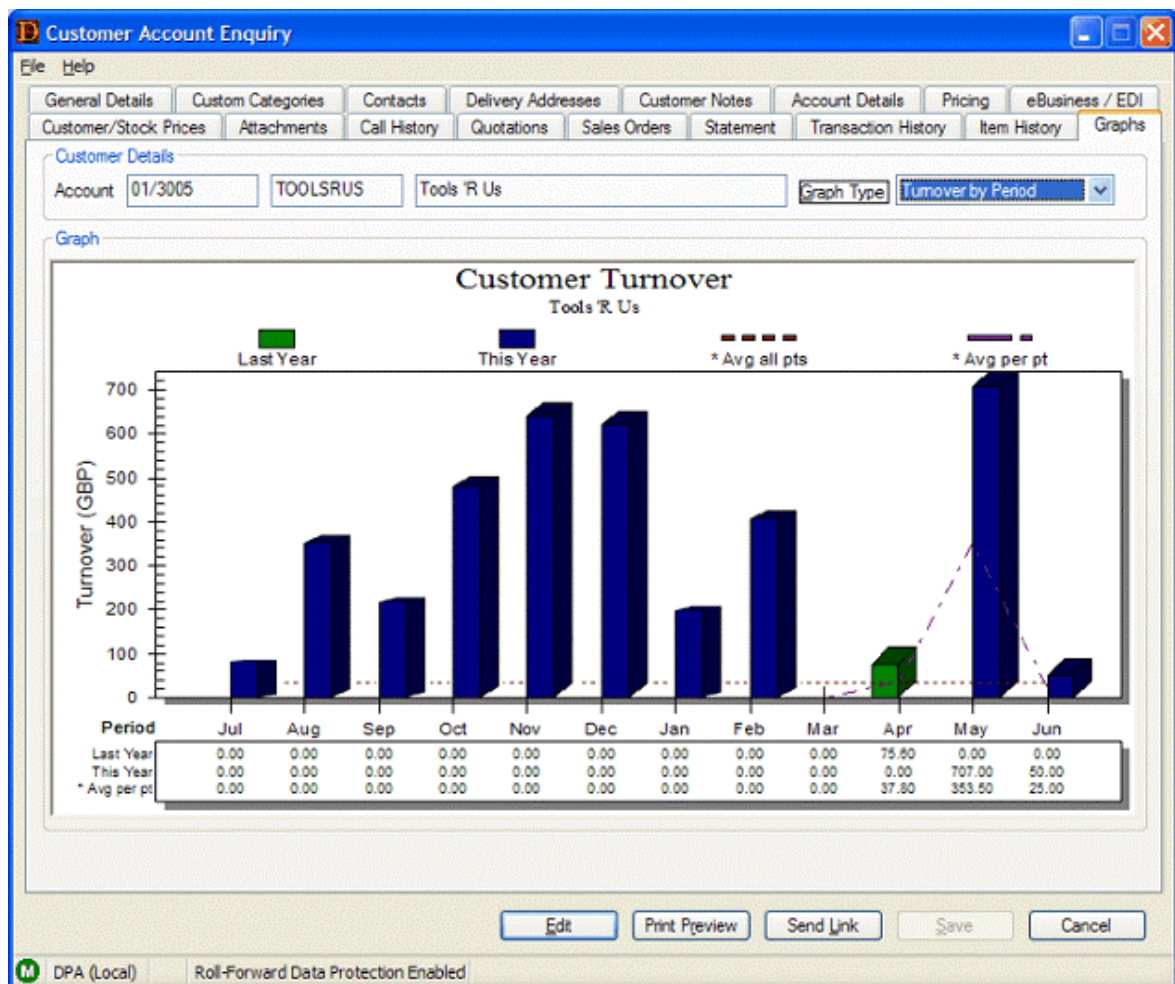

Figure 7 - Customer Account Enquiry showing one of the Graph options

B4.   Supplier Enquiry Enhancements

The Supplier Enquiry has been enhanced to show the following additional information:

- Company Web Site Address (with one-click link to that site)
- Multiple Contacts – any number of contact names can now be recorded against each supplier, as with Customer Enquiry
- Document Attachments (see below for more information)
- Analysis Graphs

- Supplier/Stock Pricing

B5.   New Nominal Account Enquiry

AXIS Diplomat 2004 features a completely new Nominal Enquiry, which includes drill-down capability within the transaction list as well as analysis graphs.

B6.   Document Attachments

AXIS Diplomat 2000SE introduced the concept of document attachments on Calls within the CRM functions of the Sales Ledger. With AXIS Diplomat 2004, this is extended to allow documents to be attached to the following:

- Customer Accounts
- Supplier Accounts
- Nominal Accounts
- Stock Records
- Quotations (on systems with Sales Order Processing)
- Sales Orders (on systems with Sales Order Processing)
- Purchase Orders (on systems with Purchase Order Processing)

Any external document, such as a word processing document, spreadsheet, digital photograph or scanned paperwork, can be attached to any of these records. Once attached, the document becomes part of the AXIS Diplomat database and so is backed up, along with the rest of the AXIS Diplomat system and is also available to anyone else on the system (subject to the appropriate security permissions of course).

This functionality allows, for example, you to attach a scanned copy of a customer's Purchase Order against your Sales Order and means that your AXIS Diplomat 2004 system can be used as a document management system.

B7.   Purchase Order Invoice Booking

For systems with the Purchase Order Processing module, a completely new Purchase Order Invoice Booking function has been developed, with an improved user-interface.

In addition, Purchase Order Invoices booked onto the system using this new function contain full line details, rather than the summary analysis details previously booked to the ledgers. This means that, for example, when using the Purchase Invoice Archive function to view an historical invoice, the full details of the items on that invoice will be visible.

B8.   Multi-User Posting Functions

The Posting routines within AXIS Diplomat 2004 have been re-written and re-designed to operate in multi-user mode, meaning that users no longer have to exit functions to allow the posting of transactions to the accounting ledgers.

B9.   Previously Optional Facilities Now Standard

In addition to the enhancements listed above, the following facilities that were previously optional are now provided as standard with AXIS Diplomat 2004:

- Product Specifications – this provides an additional six lines of description against each Stock Item, which may then optionally be printed on documentation.
- Forward Dated Transactions – this allows transactions dated for the following period to be held back until that period is reached, avoiding the need to hold back document processing.
- Ten Character Bin Location References – this extends the standard four character Bin Location References used in previous releases.

B10. General Accounts Enhancements

Sales Ledger:

- A paperclip icon now identifies those Call History entries that have associated document attachments.
- Individual customer account contacts can now be flagged as "Contact Declines Email Shots" for those that have opted out of (or not opted in to) receiving email marketing.

Stock Ledger:

- Current and Standard Costs now show the date that they were last updated.
- Stock Transactions now also records the name of the operator that created them.
- For systems that also use the Bill of Materials module, the Stock Enquiry now includes a "Where Used" tab.
- Stock records now include additional tick boxes for Non-returnable Item and Discontinued Item. Adding such items to a Sales Order, for example, results in a warning to the operator.
- On systems featuring the Bar Code option, it is now possible to print bar code labels at the end of entering a batch of stock movements.
- On systems featuring the Data/Import module, the generic stock import/update routine can now import supplier references.
- A minimum margin percentage can now be set against each Product Group. When adding items to a Sales Order, for example, the system will prevent the operator setting a price that reduces the margin below that specified against the relevant Product Group.

B11. General Sales Order Processing Enhancements

- Customer Accounts now have a "Order Number Required" tick box.
- Archive History Search has been added to Sales Order Maintenance to allow the operator to look through items previously sold to the customer and add them directly onto the current Sales Order.
- Stock Searches within Sales Order Maintenance now include pricing and margin information in the results window (see below).

Figure 8 - Stock Search showing Price and Margin information

B12. General Purchase Order Processing Module Enhancements

The indexing of Purchase Orders has been improved to provide faster searching on Purchase Orders.

Goods Received From Supplier now allows printing of bar code labels for received stock (on systems with the Bar Coding option).

B13. Document Faxing Module Enhancements

Sales Order Acknowledgements and Quotations can now be sent using the Document Faxing Module. This means, for example, that a number of order acknowledgements (perhaps for all those orders received that day) can be faxed to the appropriate customers in one batch, without the need to go through them and address them individually.

B14. eBusiness Module Enhancements

eBusiness Groups have been extended to allow a list of Alternative Groups to be a specified for a given group. This allows AXIS VMerchant to offer an item from an Alternative Group if there is insufficient stock of the selected item.

Lists of Associated Groups can also be entered for each eBusiness Group. This allows AXIS VMerchant to offer other items to the shopper that they may be interested in.

Specific eBusiness Groups can now be configured to be treated as Single Items by the AXIS VMerchant web site. This allows a range of products within one eBusiness Group to appear as if it were a single stock item, with drop-down lists to select the specific item by attribute. This is ideal for web sites selling items by size, colour, etc. (clothing, for example).

B15. Other General Enhancements

Operator Default information has been much extended and now includes default location (on systems with the multi-location stock option), order source code, department and cost centre codes.

The following functions have also been completely re-written for AXIS Diplomat 2004:

- Period End Functions
- VAT Code Maintenance
- Transaction Type Maintenance

Further Information

For additional information, including general queries on licensing and upgrade policies, please see our Frequently Asked Questions section of the web site at:

www.axisfirst.co.uk/diplomat2004/upgrades/upgrade_faq.asp

The list of enhancements described in this document is by no means exhaustive – it is impossible to compile a complete list of the changes that a given user will see between AXIS Diplomat 2000SE and AXIS Diplomat 2004 since this will depend not only on the particular combination of modules and options on a particular system but also on external factors – for example, a customer without fax, email and/or web browsing capability will be unable to take advantage of some of the new features of the system. Users of AXIS Diplomat 2000 will also benefit from the enhancements in AXIS Diplomat 2000SE when upgrading to AXIS Diplomat 2004. These can be found documented in a similar document on the Axis First web site, at www.axisfirst.co.uk/diplomat2000/upgrades.

This document is not intended as a substitute for direct evaluation of the system.

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