

Vulcan Software LLC

# Apex 10

## Introducing Apex 10

### Important Changes

- The “un-received” and “un-invoiced” quantities are now calculated based on the quantity released, not the quantity ordered.
- In P/O Maintenance there is a new “Explain/Update Price” option to delete vendor prices.
- The help system has been extensively rewritten and will work natively on Windows Vista and Windows 7.

Welcome to Apex 10, one of the most ambitious enhancements to Apex of all time. Almost two years in the making, there are a lot of exciting new features that I think you will find were worth the wait. Apex 10 has the potential to fundamentally change the way to do your purchasing.

### How can we streamline the purchasing process?

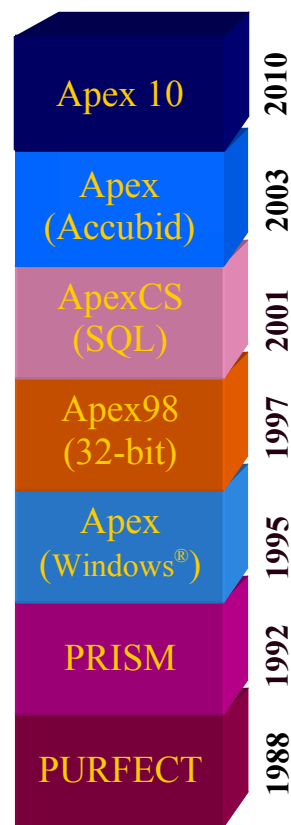
Those of you that have spent some time in the Apex Web Portal ([www.apexpurchasing.com](http://www.apexpurchasing.com)) know that I have been working towards business-to-business (B2B) communications for several years now. My initial post about this in the

General forum was dated July 2005. Probably the most important new feature in Apex 10 is the ability to send your purchase orders and receive back acknowledgments, advance shipping notices, and invoices from selected distributors over the Internet. This was a big investment for Vulcan Software both in terms of time and resources but B2B communications is now a reality.

### Is there an easier way to analyze my data?

One of the major focuses of Apex 9 was to connect with other programs, such as Microsoft Excel. This gave you a powerful synergy between your software programs, where you could

*(Continued on Page 4)*



### Topics:

Important Changes	1
Analysis Cube	1
B2B Communications	2
P/O Auditing	2
Grid Sorting, Filtering, and Grouping	3
Document Imaging	3
Report “Interactive Grids”	3
Errata	4

## Analysis Cube

If you have created a pivot table in Microsoft Excel then you have an idea what the new Apex Analysis Cube is all about. As an aside, if you haven’t used a pivot table in Excel then I would encourage you to try one. Pivot tables are one of the most powerful and underused features of Excel. Go ahead. I’ll wait.

To use the Analysis Cube you pick something you want to “measure”, such as the net P/O amount. Then you pick fields that you want to see as rows and columns and Apex instantly calculates the cross totals between them.

There is really too much to say to go into more detail here so please go try one yourself.

Vendor Name	H	I	Grand Total
COAST CONSTRUCTION SUPPLY		\$165.09	\$165.09
GRAYBAR		\$9,831.35	\$9,831.35
NORTH COAST ELECTRIC		\$14,017.49	\$14,017.49
SEQ WAREHOUSE STOCK	\$967.09		\$967.09
STONEWAY ELECTRIC SUPPLY		\$4,671.92	\$4,671.92
SUNBELT RENTALS		\$550.00	\$550.00
WESCO DISTRIBUTION INC		\$10,514.90	\$10,514.90
Grand Total	\$967.09	\$39,750.75	\$40,717.84

## B2B Communications

Business-to-business communications, hereafter referred to as B2B, uses the Internet to communicate information between you and your distributors. Of course you have been doing that for years now by using email. The difference is that with B2B communications Apex and your distributor's computers communicate with each other directly. There is no rekeying of your purchase order, no delay while someone gets to their email, and no errors when things are transcribed incorrectly.

It is exciting to see this in action, but more importantly B2B communications "reduces the friction" involved in purchasing material. It is a huge win-win for both you and your distributor.

### Sending your purchase order

You can send your purchase order to your distributor with the push of one button. Depending on the capabilities of the distributor Apex will send the information to them in an appropriate format.

### Receiving acknowledgments

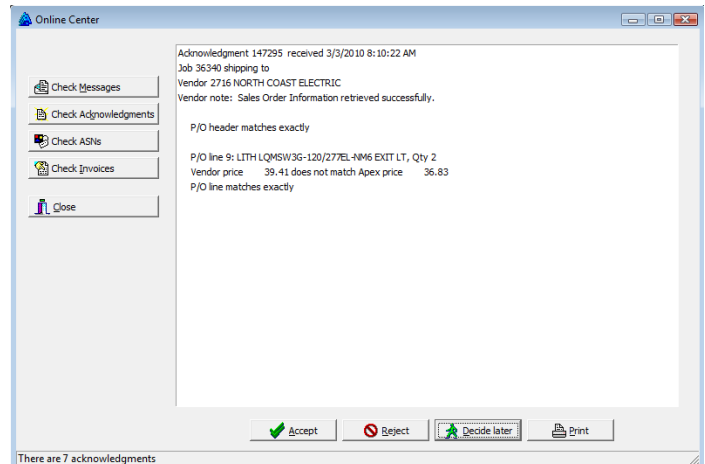
An acknowledgment is used to confirm the prices and availability of your items. It also ensures that the vendor understood your order and wrote it up correctly.

When you get an acknowledgment back from the distributor Apex will compare it with the purchase order in your records and note any differences. You then have the opportunity to accept or reject the acknowledgment. If you accept the acknowledgment then your records are updated to match what the distributor acknowledged. If the purchase order is not already in Apex then the whole thing is built for you from scratch without you doing any data entry!

If you reject the acknowledgment then your records are left alone and you can handle any discrepancies off line.

### Receiving ASNs

Advance ship notices are used to create your material receipts, just



like if you had entered them in Receiving Maintenance. This allows you to manage your receiving by exception instead of having to do all of the data entry yourself.

### Receiving invoices

Finally, you can receive your invoices electronically and add them to your Vendor Invoice Reconciliation screen.

If you haven't talked to me about doing B2B communications with your main distributors I would encourage you to do so.

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*It is exciting to see this in action, but more importantly B2B communications "reduces the friction" involved in purchasing material.*

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## Purchase Order Auditing

Who deleted this P/O line? What was the original quantity ordered before this was backordered? How did this line look before it was updated by the vendor acknowledgment?

If you have asked yourself these questions then P/O auditing is for you. Well, you probably haven't asked yourself the last

question yet but soon you might.

When the Apex 10 P/O Auditing function is enabled all changes to your purchase orders are tracked, including additions, changes, and deletions.

The audit shows detailed information about each field that has changed including the old value, new value, date and time of

change, the user that did the change, and the workstation.

The Apex program does not do the auditing itself. Instead, Apex "teaches" the database to do the auditing. That means that you will have audit data no matter how your data is changed by Apex, an Apex utility, an accounting system interface, or a program of your own design.



# Grid Sorting, Filtering, and Grouping

Grids have lots of new tricks. After you have done any initial searching and a grid is populated with data you can sort it just like you did before by clicking on the column title.

The grid may have a “column selector” button where you can open up a list of columns and check which ones you want displayed. You can drag the fields to wherever you want them, including to multiple lines!

Pressing a small arrow in the column title displays a list of values that you can choose to filter your data. Date columns have dozens of filter options, such as “Last Month”, “Last week”, “2009”, and “Yesterday”.

You can also use the navigator bar or the “Customize” button to create an advanced filter involving multiple columns.

Finally, some grids allow you to group by column values by drag-

ging the column into a “Grouping” area. This generates the corresponding group subtotals for you automatically.

Combined with this is a powerful new Grid Print feature where you can create and customize a report of your data. The report can show only subtotals or any level of detail that you choose.

You can also export the grids to Excel, CSV, TSV, XML, and HTML files.



# Document Imaging

When I introduced document imaging in Apex 9 I was concerned that if a page got scanned incorrectly it would be difficult to fix. That is why every page was stored separately. If there was a bad page you could simply delete it and rescan it.

That made some sense until you had to work with 50 page documents. If you wanted to print that document you had to print the P/O and individually select

each of the 50 pages. Apex 10 makes this a lot easier by storing whole documents instead of individual pages. Now you would just have to select that you want to print one document instead of 50 individual pages.

Your original document images will still look like a bunch of one page documents, but you can easily combine them together into a single document by using the new “Combine” button.

I have also introduced tools that you can use to rotate, straighten, de-speckle, and print your documents.

You can export your document images as TIF files if you want to work on them using external tools and then import them back into Apex.

Apex 10 can also correctly import a much wider variety of PDF files.

*I have also introduced tools that you can use to rotate, straighten, de-speckle, and print your documents.*

# Report “Interactive Grids”

Many of the Apex 10 reports will now let you interact with your reports instead of just printing them. This is done by having the report displayed in an “Interactive Grid”. You can sort, filter, and group the Interactive Grid just like you can with

any other Apex grid.

From the Interactive Grid you can export your data Excel, CSV, TSV, XML, and HTML files. The export works perfectly since Apex doesn’t have to “guess” where the columns line up like Apex 9.x did when you exported from the Report Pre-

view screen.

You can also use the powerful new “Grid Print” capability that lets you create and customize a report from the Interactive grid, save the report as a PDF file, or send it automatically as a PDF attachment to an email.

Interactive Grid						
Consolidated Material						
Job 11080						
Pg 7						
Description	Mfg	Item	Vendor	Job	Utrcvl	Amnt
- Pg : 110566					225	76.03
ARL EMT75 3/4IN NH TERMINATOR	018997	12205	3735	11080	30	1.87
BOWERS 403-BW 1/2 1/2 SW RING	781720	00603	3735	11080	15	6.25
CONDUIT 3/4-EMT 3/4-EMT	980010	02002	3735	11080	150	62.36
REGAL 8392 3/4 INAL STRAP	785394	83010	3735	11080	30	5.15
- Pg : 110570					2,331	233.61
BOWERS 3-O-EXT-1/2 OCT EXT RING	781720	00130	3735	11080	2	6.9
BOWERS 4-IN FB-SPR 4-IN SQ BOX	781720	04117	3735	11080	2	1.77
CONDUIT 1/2-EMT 1/2-EMT	980010	02001	3735	11080	200	40.92
GE THQB1120 1P 20A 120V BOLT-ON CB	783164	01218	3735	11080	2	19.5
REGAL 701 1/2 D/C 5/8CR EMT CONN	785394	70100	3735	11080	50	5.99
REGAL 711 1/2 D/C 5/8CR EMT CRG	785394	71100	3735	11080	25	3.31
REGAL 8301 1/2 IN EMT STRAP	785394	83010	3735	11080	50	2.5
WIRE THHH-12-84K-SOL-CU-5005R WIRE	980100	22400	3735	11080	500	38.18
WIRE THHH-12-GRN-SOL-CU-5005R WIRE	980100	22440	3735	11080	500	38.18
WIRE THHH-12-RED-SOL-CU-5005R WIRE	980100	22430	3735	11080	500	38.18
WIRE THHH-12-WHT-SOL-CU-5005R WIRE	980100	22410	3735	11080	500	38.18
- Pg : 110789					26	45.00
TYCO 69338-4 YELLOW		4510	11080		25	45
					14,050	38,292.32

## Errata

### *Other changes to Apex include:*

- When you are importing lines into your purchase order you can have Apex calculate the exact unit prices by importing the quantity ordered along with the extended amount field, "Ext".
- The Comparative Analysis report has a new option to show the percentage difference of each price from the low price.
- Accubid changed the format of their take-off files in version 10. Apex can now import those files using the Import Accubid selection.
- The Extended Description can be displayed on the receiving and release maintenance screens. You can use the grid's column selector to choose to display that column and then drag it to where you want it.
- If you customize the layout of the grid in P/O Maintenance, Receiving Maintenance, or Release Maintenance it is saved so that it will appear in the same format on subsequent uses.
- The Receiving Journal now asks you to specify a company if you are using Apex Advanced Company Security. This allows each company to independently do their own receiving.
- The Apex Import and Export utilities support additional Apex tables.
- Copying net prices and selecting "Lower Prices Only" now works correctly when vendors have prices with different units of measure.
- The vendor and job names are now shown in the P/O Search results.
- All grids such as "Show detail of Receipts" display totals when applicable.
- Using Receiving Maintenance and Vendor Invoice Reconciliation when Apex Advanced Company Security is enabled now works correctly.
- Entering an invalid P/O number in Vendor Invoice Reconciliation is now handled more gracefully.
- The TRA-SER Link Setup selection no longer asks you for the TRA-SER link directory since "C:\TSP" has been the correct answer for years now.

# APEX



## Introducing Apex 10

(continued from page 1)

choose the best tool for the job. You have Apex for best practices in contractor purchasing, Excel for analysis, and your accounting system for accounts payable. However, many of you felt that you were spending too much time moving data between Apex and Excel. Apex 10 offers advanced searching, sorting, filtering, grouping, and a new "analysis cube" to help you slice and dice your data.

### **Did you know documents could be more than one page long?**

Actually, yes I did. Apex 9 stored single "pages" for you instead of whole documents. Frankly, I did this in case a page got scanned incorrectly. If it was in the middle of a 50 page document you could just rescan that page. Apex 10 adds new multi-page document imaging capabilities. And, in case a

page gets scanned incorrectly you can rotate, align, and de-speckle it.

### **Who messed up my beautiful P/O?**

With the new Apex P/O auditing feature you can create a detailed audit of your P/O changes. This can be especially helpful if someone accidentally deletes a P/O line, or if you want to see how your P/O looked before a B2B vendor acknowledgment was accepted and made some changes to it.

### **Can you change this report just a little?**

The Apex reports are generally very flexible, but sometimes they only get you close to what you need. Apex 10 lets you customize your reports by sending them to an interactive grid instead of just to a report preview. From the interactive grid you can group, sort, and filter

your reports as required.

I would like to thank everyone for their continued support over the last couple years while we developed Apex 10. I know that it was a lot to ask of you to maintain your support and enhancement agreement during troubling economic times, especially since we all know that Apex doesn't really require much support. Yet, virtually every one of you kept the faith and kept up your support and enhancement agreements. For that I am deeply grateful.

We hope you enjoy the new Apex 10 features. As always, we welcome your feedback.