**Release Notes Nexelus 2024.2**

**Date:** November 11, 2024

**Introduction**

We are delighted to announce the release of Nexelus 2024.2. This release incorporates enhanced functionality. Details on enhancements and updates are provided below.

**APWorks**

**Invoice Scanning and Processing**

* **Migration to Azure AI Document Intelligence:** We have completed the system migration from Amazon AWS Textract Service to Microsoft Azure AI Document Intelligence. This release offers improved performance, security, and scalability. The migration ensures that our invoice scanning and processing capabilities are more robust and efficient. Please contact your Nexelus consultant for more details on how this change can benefit your operations.
* **Vendor Mapping:** A new Vendor Mapping feature has been introduced as an alternative to invoice model mapping. This simplified alternative enhances invoice recognition in APWorks by allowing users to map vendors directly, by eliminating the need for complex model setups. For more information on how to implement and utilize this feature, please reach out to your Nexelus consultant.

**Dashboard and Layout Enhancements**

* **Dashboard Layout Expansion:** The dashboard layout has been enhanced to allow any gadget to be expanded to fill the entire dashboard area. This change increases the page count to 25 per page, significantly improving data visibility and usability. Users can now view more information at a glance, making it easier to manage and analyze data.
* **Drag and Drop for Invoice Processing:** The Invoice Queue grid on the dashboard now supports drag-and-drop functionality for processing invoices. Users can drag multiple PDF files onto the Invoice Queue grid to upload them for invoice scanning, streamlining the process and saving time.

**Invoice Editing Enhancements**

* **Line Combination and Split/Merge Features:** Users can now select multiple invoice lines with the same IO/PO and merge them into a single invoice line. This feature simplifies the invoice editing process by reducing the number of lines that need to be managed. Additionally, users can split a single invoice line into multiple lines by selecting multiple IO/POs in the insertion order lookup window, providing greater flexibility in managing invoice details.
* **Discrepancy Filtering:** A checkbox has been added to filter out discrepant lines, making it easier to review and reconcile data directly within the dashboard. This feature helps users quickly identify and address discrepancies, improving the accuracy of invoice processing.
* **Discount Processing:** Functionality to read and save discount amounts based on the total invoice amount has been implemented. This enables accurate recording and reporting of discounts, ensuring that all financial records reflect the correct amounts.
* **Drag and Drop for Invoice Processing:** Invoice Editing now supports drag-and-drop capabilities for attaching additional documents to invoices. A drag-and-drop panel has been added to the document tab in the Invoice Editing UI. Users can drag and drop multiple files onto this panel to upload and attach them to the invoice, making it easier to manage supporting documents.
* **Client Selection on Invoice Header:** A client selection option has been added to the vendor invoice header, allowing assignment and filtering based on specific invoice attributes (e.g., IO/PO and Project/Campaign). This feature helps users organize and manage invoices more effectively by associating them with the relevant clients and projects.
* **Show My Lines:** When approving an invoice, a checkbox is displayed at the top of the invoice lines to filter the lines that the logged-in user can approve. This simplifies the approval process, especially for invoices with a large number of lines, by allowing users to focus only on the lines they are responsible for.

**Approval Enhancements**

* **Pending Invoice Display on Dashboard:**The APWorks platform will display invoices in the 'Pending Invoice' section of the Media and Production Dashboard only if the user has the authority to approve them.
* **Auto-Approval:** A rule has been introduced at the company level that enables auto-approval for invoices that fully match predefined criteria. This allows invoices to be automatically approved up to the last approval level without manual intervention, streamlining the approval process and reducing administrative workload.
* **Line-Level Approval:** Line-level approval functionality for invoices has been introduced in APWorks, enabling finer control and tracking within invoice approval workflows. Users can now approve individual invoice lines if they have approval access for that line, providing more granular control over the approval process. Please contact our consultant for further information on how to implement this feature.
* **Routing Approval to Client Teams:** The selection of clients on the invoice header facilitates routing invoices to the appropriate client teams. This ensures that invoices are reviewed and approved by the correct team members. Invoices can also be forwarded or routed to specific users for pending approval, improving the efficiency of the approval process.

**Google Drive Integration**

* **Google Drive Integration:** APWorks now supports Google Drive to automate file retrieval and processing from client storage, minimizing manual uploads. Users can specify a pre-configured Google Drive in APWorks. All invoices and their respective attachments placed on this Google Drive will be imported into APWorks for scanning purposes, reducing the need for manual intervention.
* **Automated Attachment Detection:** Files within the same folder as invoices are automatically linked as attachments (non-PDFs) based on shared identifiers. This feature ensures that all relevant documents are associated with the correct invoices, improving document management and retrieval.
* **Company Detection:** The system now reads company identifiers on invoices for accurate routing. If a company is not detected on an invoice imported from Google Drive, the system defaults it to a specific company and marks it for further review. This helps ensure that invoices are processed correctly and routed to the appropriate departments.
* **Company Switch:** If the system does not detect a company on an invoice, the default company is assigned to invoice. Users can change the company on invoice while editing the invoice to appropriate company.
* **Improved Error Handling:** Logs and errors for unsupported file types or oversized files ensure attachments are secure and manageable. This feature helps users identify and address issues with file uploads, ensuring that all documents are processed correctly.

**Broadcast Invoices Module**

* **Dedicated Broadcast Invoice Module:** APWorks now supports the processing of broadcast invoices in EDI and PDF formats. A separate section has been added to APWorks for managing broadcast invoice processing, with dashboards, invoice models, and document views tailored to broadcast needs. Enhanced management tools include an invoice model list, non-mapped production invoices, and document handling for EDI invoices, providing a comprehensive solution for managing broadcast invoices.
* **User Group Management Updates:** User group permissions have been updated for broadcast invoices to define authorization workflow, security, and authorization. This ensures that only authorized users can access and manage broadcast invoices, improving security and compliance.
* **EDI File Processing and PDF Generation:** The APWorks workflow now handles EDI file processing and automated PDF generation for broadcast invoices. This feature streamlines the processing of broadcast invoices, reducing manual effort and improving efficiency.
* **Invoice View UI:** A read-only broadcast-specific invoice view UI has been introduced for broadcast invoice management. This view provides users with a clear and concise overview of broadcast invoices, making it easier to manage and review them.
* **EDI Processing:** Enhanced to support broadcast media invoices through electronic data interchange (EDI), covering broadcast media attributes and integration with other APWorks modules. This feature ensures that broadcast invoices are processed accurately and efficiently, improving overall workflow.

**System Setup**

* **Vendor – Site Mapping:** Vendors, stations, and sites can now be associated with multiple pay-to entities (e.g., Bell Media linked to multiple billing entities) to support complex billing relationships. This feature provides greater flexibility in managing vendor relationships and billing processes.
* **Approval by Role, Client, and Media Type:** Approval workflows can now be configured at the client, role, and media type levels, enabling a more refined approach to approvals for larger organizations with complex role structures. This feature ensures that approvals are managed effectively, reducing the risk of errors and improving compliance.

**Reporting Enhancements**

* **Invoice Spot-Check Report:** A reporting feature has been added to enable spot-checking of processed invoices for quality control and auditing purposes. This feature helps organizations ensure that invoices are processed accurately and that any issues are identified and addressed promptly.

This major release primarily focuses on the underlying technology shift from AWS Textract to Azure Document Intelligence for improved invoice processing, EDI file processing of broadcast invoices, expanding client-specific and media-specific functionality, enhancing user interfaces, and automating integration and data retrieval across external platforms.

**Browser Information**

This release is supported on the following browsers:

**Windows**

* Edge 42.17134.1.0
* Firefox 65.0.2
* Chrome 74.0.3729.169

**MAC**

* Safari 12.0.2