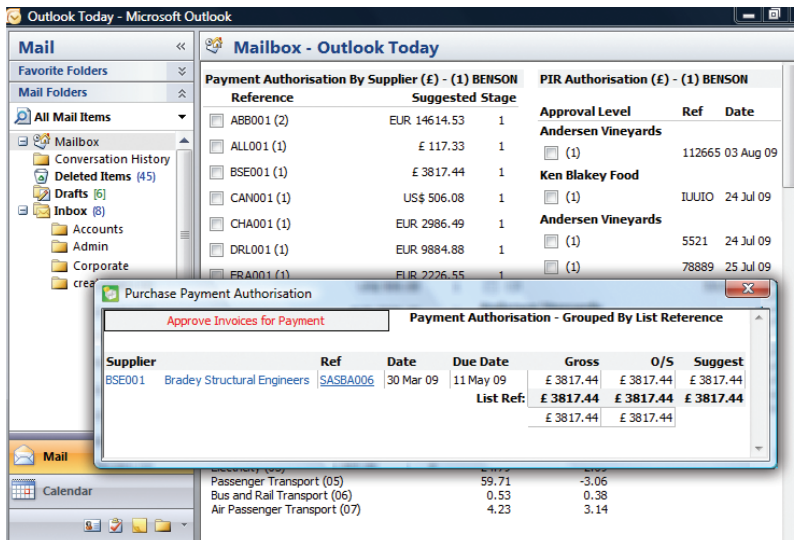


Access Office Integration (AOI)

Microsoft Office, and in particular Microsoft Excel, plays a dominant role in the compilation and analysis of financial information. Its popularity in the workplace means that most business processes rely on its functionality for everyday tasks such as budgeting, forecasting and financial modelling. By providing secure, two-way links between Microsoft Office and Access Dimensions, the AOI module empowers many more users around your business to access key accounts data without leaving the familiar, easy-to-use Microsoft interface.



Integration with Microsoft Outlook: secure, two-way links enable users across your business to view and approve financial information (such as invoices) from the familiar Office interface.

Business-wide benefits

Attach documents to records, view and approve invoices, search your entire database and much more. These are just some of the tasks users can carry out without needing any prior knowledge of, or access to, your Access system.

This not only makes your standard tasks quicker and easier to carry out, but removes bottlenecks around your business by enabling non-system users to gain key decision-making information when they need it.

Two-way integration with Excel

Using AOI, information held within your solution can be downloaded to Excel, worked upon and uploaded again, with inbuilt rules fully protecting the integrity of auditable and VAT information.

This functionality shaves hours off your routine tasks, such as price updates, budget revisions and customer analysis.

Analysis

Once in Excel, your information can be explored and manipulated with ease, enabling you to plot and gain a greater understanding of trends, for example, seasonal customer buying patterns.

Access Analytics

The Access Analytics functionality provides staff with a highly functional alternative to pivot tables, using 'data cube' technology to view different elements of your data without creating separate spreadsheets. Simply 'ask' specific questions and data cubes investigate the system and provide the information in seconds. When centrally held data is updated, the data cube report updates automatically, without you having to reconstruct the report from scratch.

Key features

Data manipulation/exploration within Microsoft Excel, Outlook and Word

Secure, real-time upload/download to Excel

Attach documents to accounts records

Approve transactions from within Outlook

Apply filtering rules in Outlook

'Quick find' search

Smart Tag links

Access Analytics (data cubes)

This feature is particularly useful where layers of information intersect. For example, you could search by cash sales in the last six months and then establish trends in the goods bought and their respective profitability.

To cross-tabulate data, such as substituting Margin for Profit or substituting Vendor for Sales Person, simply drag-and-drop and get the results immediately. There's no limit to the amount of data that you can feed into a data cube, so you can compare multiple data sets with ease.

Data cubes can also be re-used outside of Excel. For example, you can display your favourite cubes in Microsoft Outlook so that key analytical data, for example sales pipeline or project information, is available and automatically refreshed for non-finance staff.

Two-way links with Microsoft Office

Your Outlook Today screen can be configured to display vital accounts information and functionality – for example, purchase invoice authorisation options give you a personalised list of your outstanding invoices and the power to approve or reject them; all within an embedded pop-up window. For example, you can authorise purchase invoices, post recurring journals, view your top 10 customers or products and more.

Attach & retrieve documents

Electronic documents can be attached directly to accounts records, from within Microsoft Office. In the case of in-bound emails, you can establish rules automatically filtering and attaching correspondence to your customer, supplier and prospect files – bringing the ideal of the 'paperless office' another step closer.

Working in Word

You can also view all the documents held in your Access solution without leaving Word: for example, you can display all the Word files associated with your chosen record. This provides instant, company-wide access to past documentation, and enables you to reference, duplicate and revise previous documents when issuing new correspondence.

'Quick find' search

You can search your entire database without leaving MS Office. For example, if you are working in Outlook when an email is received from 'J. Jones & Sons' you can instantly and simultaneously interrogate your sales and purchase ledgers (and prospect records) for a company of that name, while remaining in Outlook.

Search results are displayed in a pop-up window and records can be investigated in further detail by clicking on the attached Smart Tag links.

Key benefits

Save time carrying out standard accounts tasks (price updates, budget revisions and customer analysis)

Eliminate re-keying and improve accuracy

Reduce paper circulating around the office

Supply non-system users with accounts data

No need to buy additional accounts software licences

Subject to full security and audit trail

Keep up-to-date with KPIs