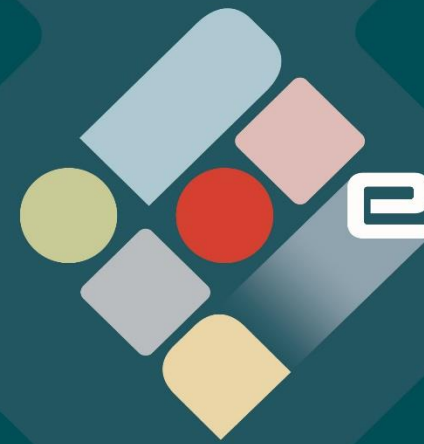


Kinetic

Extended Education

Insights 2023 - May 14-15

Mandalay Bay, Las Vegas, NV



Sunday May 14, 2023

8:00 AM - 12:00 PM

Sunday May 14, 2023

1:00 PM - 5:00 PM

Monday May 15, 2023

8:00 AM - 12:00 PM

Monday May 15, 2023

1:00 PM - 5:00 PM

EE1: Driving System Enhancements With Application Studio Fundamentals	EE10: Expanding System Enhancements With Application Studio: Advanced	EE19: Driving System Enhancements With Application Studio Fundamentals	EE28: Expanding System Enhancements With Application Studio: Advanced
EE2: Enhance Control of Business Processes With Epicor Functions	EE11: Creating Advanced Business Activity Queries (BAQs) for Better Data Management	EE20: Mastering Your Business Processes With Advanced BPM and Functions	EE29: Ensuring Data Integrity With Queries and BPM Directives
EE3: Managing Your Financial Cycle in Kinetic	EE12: Processing and Tracking Your Job Costs in Manufacturing	EE21: Leverage Multi-Company Functionality in Epicor Kinetic	EE30: Advanced Costing Features in Kinetic
EE4: Planning and Processing Jobs With Material Requirements Planning (MRP)	EE13: Job Management Utilizing Kinetic Manufacturing Features: Advanced	EE22: Understanding and Troubleshooting Material Requirements Planning (MRP) and Scheduling	EE31: Advanced Inventory Features in Kinetic
EE5: Data at Your Fingertips: Customizing Standard SSRS Reports	EE14: Managing Reports and Communications Using Advanced Print Routing (APR)	EE23: Extend Your SSRS Development With Multiple Interacting Business Activity Queries (BAQs)	EE32: Customize Your Reporting With Drillable Data in Excel Using Spreadsheet Server
EE7: Creating Integrations for Your System With Rest API	EE15: Epicor Enterprise Content Management (ECM) Advanced Workflow Design for Kinetic	EE24: Deep Dive Into Automation Studio for Kinetic	EE33: Introduction to Epicor CPQ
	EE16: Deep Dive Into Automation Studio for Kinetic	EE25: Digging Into Your Kinetic Data With Grow, an Epicor Solution	
		EE6: Streamline Your Project Accounting With Advanced Project Management (APM)	

Key: ● Tools ● Financial ● MRP ● Reporting ● Integrations/Modules

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EE 1: Driving System Enhancements With Application Studio Fundamentals

When customizing your application, you use the Application Studio. This powerful new tool offers drag and drop functionality that enables you to make specific changes and enhancements to your application even if you are not a programmer. Use Application Studio to refine user interfaces to fit your organization or business needs. Through this tool, you can hide fields your company does not use, display proprietary data within your system, add sliding panels to display related data, and other features that improve your return on investment.

Cost: There is an additional \$325 fee to attend this session.

Objectives:

- Navigate the Application map
- Manage Layers
- Data bindings
- Dropdown controls
- Searches
- Add Child DataViews
- Row Rules
- Event Handlers

Audience:

- Software Developers
- System Administrators

Program Level: Beginner

EE 2: Enhance Control of Business Processes With Epicor Functions

Epicor Functions provide the ability to create process workflows using the BPM designer that can be called from both method and data directives or added to a schedule to be run as a one time or recurring process. Many solutions that previously required a Service Connect integration can now be done with functions. This class will focus on the very basics of creating and implementing functions for server-side processes for some of the more common tasks such as automatically assigning codes (part, customer, supplier etc.)

Note: This session uses the Classic interface.

Cost: There is an additional \$325 fee to attend this session.

Objectives:

- Review User Account Security for Functions security roles.
- Set up a Trace Log to review business logic calls triggered by your application activity.
- Understand the basic methods within a business object.
- Add and manage function libraries.
- Add a widget function and configure its method signature, service, assembly, and table references.
- Build a process using workflow actions.
- Deploy function libraries.
- Debugging techniques.

Audience

- System Administrator
- IT / Technical staff

Prerequisites:

- Basic Epicor navigation
- Business Process Management class or some level of experience building method and data directives
- Knowledge of method and data directives Workflow Designer

Program Level: Advanced

EE 3: Managing Your Financial Cycle in Kinetic

If you are a finance employee this course is for you. During this session you will learn how the core manufacturing and cash cycle transactions interact with the General Ledger (GL).

This session will allow you to understand the GL setup and hierarchy used by the Epicor application to determine the accounts and journal codes where transactions post. Identify the main inventory, labor, accounts receivable, and accounts payable transactions and the role setup programs play in controlling where and when to post.

Cost: There is an additional \$325 fee to attend this session.

Objectives:

- Perform GL Control Code setup to leverage the transaction hierarchy capabilities of the application.
- Understand the relationship between GL Transaction Types, GL Control Types, and GL Control Codes.
- Comprehend the financial impact of Product Groups, Part Classes, and Departments.
- Perform inventory and labor transactions to analyze the impact of the GL Control Code setup.
- Complete a Cash Cycle (AR Invoice, cash receipt, AP Invoice, supplier payment) and review related GL transactions.
- Identify core reports and trackers used to maintain the GL integrity.

Audience:

- CFO/Controller
- Cost Accountant
- AP Clerk
- AR Clerk

Prerequisites:

- Introduction to Kinetic Course
- System Flow
- General Ledger
- Knowledge Camp Course

Program Level: Intermediate

EE 4: Planning and Processing Jobs With Material Requirements Planning (MRP)

This session is designed to introduce the primary functions of the Material Requirements Planning (MRP) module. The session also covers the use of MRP planning tools to both estimate potential demand and propose the supply that answers this demand. Review of forecasts and master production schedules as a demand source will be addressed along with other demand sources: inventory requirements, and orders. This session begins with a review of the MRP system configuration and the part maintenance file setup. The emphasis of the course is on the process of MRP, running MRP on a scheduled basis, review of the MRP Jobs, and firming up those jobs for production.

Cost: There is an additional \$325 fee to attend this session.

Objectives:

- Identify factors that affect material requirements planning.
- Describe setup requirements.
- Describe Part Maintenance setup details that affect MRP.
- Create a forecast for a part.
- Create a master production schedule.
- Process MRP using different scenarios.
- Review the results of a corresponding MRP run.
- Use Job Status Maintenance.

Audience:

- COO/Operations Manager
- Scheduler
- Shipping and Receiving
- Production Manager
- Purchasing Staff/Buyer

Prerequisites:

- Epicor system navigation skills
- Job Management course

Program Level: Beginner

EE 5: Data at Your Fingertips: Customizing Standard SSRS Reports

This session introduces Microsoft SQL Server Reporting Services (SSRS) reports and their implementation in your Epicor system. Microsoft SSRS is a server-based reporting platform that provides comprehensive reporting functionality to generate reports from SQL Server databases.

To create the custom reports, the first workshops use Microsoft SQL Server Report Builder, a report authoring tool. Report Builder utilizes a Microsoft Office style environment, so its familiar interface makes it ideal for developing most custom reports.

Cost: There is an additional \$325 fee to attend this session.

Objectives:

- Embed images that are included in standard reports without the need for editing the SSRS reports
- Use the Cloud friendly 'Generate for Design' feature to edit SSRS reports without requiring a local download
- Use the SSRS Report Builder to edit standard Epicor SSRS reports and custom SSRS reports
- Add custom SSRS reports within your Epicor system's menu and display them during runtime
- Create new SSRS reports using BAQ's as the data source
- Add custom BAQ reports your Epicor system's menu and display them during runtime

Audience:

- System Administrator
- IT/Technical Staff
- Report Writers
- Business Analysts

Prerequisites:

- Understanding of the Epicor's interface
- Knowledge of report authoring programs
- Knowledge of relational database concepts such as table relationships, records, and field types
- Understanding of business activity query (BAQ) functionality

Program Level: Intermediate/Advanced

EE 6: Streamline Your Project Accounting With Advanced Project Management (APM)

Through this session you will learn how Advanced Project Management allows Epicor customers to address the challenges of contract management and multifaceted projects with an integrated solution. Advanced Project Management provides the ability to manage the complete project contract life cycle by combining project/contract accounting, contract management, and sub-contract management into the Epicor Project Management for an end-to-end functionality.

This session will allow you to create Projects linked to a contract and Subcontracts with the ability to perform project and accounting cost and revenue analysis by using:

- Multiple billing types under one contract
 - Fixed Price (Lump Sum, Progress, Milestone)
 - Schedule of Rates (Time, Expense, Material, On-charge, Delivery-based, UOM)
 - Recurring (Subscription, Rental, Maintenance)
- Rates Management
- Claims Process
- Project / Contract Variation Management
- Project Accounting (Project Ledger, Project Accruals)
- Sub-Contract Management / Retentions
- Budgets – by Cost Code and Time Period
- Tendering Process / Bid Management
- Reporting
- Data Management

Cost: There is an additional \$325 fee to attend this session.

Objectives:

- Ability to create Contracts and Projects
- Analyze project data
- Generate reports and dashboards to review the project status and progress

Audience:

- Project Manager
- Project Users
- CFO
- Accountants

Program Level: Beginner/Intermediate/Advanced

EE 7: Creating Integrations for Your System With Rest API

During this session, you will get hands-on with the Epicor REST Services and learn how you can much more quickly and easily than ever before build integrations with Epicor data in a wide variety of scenarios from connecting data to off the shelf applications like Microsoft® Excel® and PowerBI® to writing completely custom applications in the programming language of your choice. We will start from the ground up and show you how to enable the services, find and test the service calls you need, and ultimately create a simple custom application that interacts with Epicor data.

Cost: There is an additional \$325 fee to attend this session.

Objectives:

- Explain when and why you should use Epicor REST Services
- Understand how to enable Epicor REST Services in Epicor 10.1.500+
- Locate Epicor REST Service Methods and try them with interactive documentation
- Test and generate sample code to call Epicor REST Services with Postman, a REST Service Testing Utility
- Create simple OData Queries to filter data from REST Services
- Integrate Epicor Data into OData Applications such as Microsoft Excel
- Create a basic custom application that integrates Epicor Data via REST
- Generate Custom REST Services from BAQ
 - Securing REST services
 - Monitoring REST Services

Audience:

- System Administrator
- IT/Technical Staff
- Software developers

Prerequisites:

- Understanding of Epicor navigation
- Basic Familiarity with Epicor BAQ Queries
- Basic Scripting / Programming Knowledge

Program Level: Intermediate

EE 10: Expanding System Enhancements With Application Studio: Advanced

Continuing the exploration of Application Studio, this session covers more advanced use cases for customizing your Epicor system. We will explore leveraging the new Application Studio toolset to incorporate data from other services into new change layers to create an enhanced user experience.

Cost: There is an additional \$325 fee to attend this session.

Objectives

- Build Dashboards with updatable BAQs
- Calling service methods passing parameters
- Calling Functions passing parameters
- Calling methods and or functions from event handlers
- Working with Type Script for more advanced custom processing

Audience:

- System Administrators
- Software Developers

Prerequisites:

- Business Activity Queries
- Business Process Management
- Embedded Customization

Program Level: Advanced

EE 11: Creating Advanced Business Activity Queries (BAQs) for Better Data Management

The Advanced Queries class covers technical features that go beyond building simple queries in Epicor Kinetic. Create Intercept and Except queries that determine differences between two sets of data. Examine using subqueries for selecting records. Aggregating data into row and column matrices is explored using the Advanced Group By and PIVOT features. See how you generate hierarchical data using a Common Table Expression (CTE) subquery with recursion. Then look at data from outside Epicor Kinetic by creating an External Business Activity Query. The course is designed for those with some BAQ familiarity who want to take their knowledge to the next level.

Note: This session includes both Kinetic and Classic content.

Cost: There is an additional \$325 fee to attend this session.

Objectives:

- Create an except business activity query
- Create an intercept business activity query
- Create a subquery that selects records
- Create a query that uses an Advanced Group By clause
- Understand how to use PIVOT table functionality in BAQs
- Use the Common Table Expression to display hierarchal data
- Create an external business activity query to reference data outside of Epicor Kinetic

Audience

- System Administrator
- IT/Technical Staff

Prerequisites

- Navigation
- Business Activity Queries (BAQs)

Program Level: Intermediate

EE 12: Processing and Tracking Your Job Costs in Manufacturing

The purpose of this session is to help you understand how your Epicor system processes job costs. As the job moves through the system, it examines the components and calculations the application uses to create estimated costs; actuals are then accrued through the manufacturing process. The session describes the job process, evaluates where job estimates are established, and then demonstrates how actual costing data is accumulated through methods of manufacturing to arrive at the final costs for each job record.

Cost: There is an additional \$325 fee to attend this session.

Objectives:

- Comprehend the flow of a job through the manufacturing process.
- Identify the costing components and calculations used in a method of manufacturing.
- Demonstrate the impact of material issue and labor transactions on job costing.
- Explain how costing data is accumulated to determine the final cost on each job record.
- Describe the impact of material receipts on job and inventory costing.
- Monitor costs using the Production Detail, Work in Progress and WIP/Inventory Reconciliation reports through the entire production-to-inventory cycle.

Audience:

- Cost Accountant
- CFO/Controller
- Engineer
- Job Planners

Prerequisites:

- Navigation
- System flow
- Job management
- General Ledger
- Engineering

Program Level: Intermediate

EE 13: Job Management Utilizing Kinetic Manufacturing Features: Advanced

Take a bold step towards mastering Epicor's manufacturing tools! Create detailed daily production plans with employing lean principles. Auto-replenish your backflushed bins with Kanban. Batch jobs or split them according to your business needs. Work with co-parts, differentiate between scrap and non-conformance. Organize your production work force into teams and optimize the use of Data Collection (MES). If you are ready to take it to the next level - this session has it all.

Cost: There is an additional \$325 fee to attend this session.

Objectives:

- Work with co-parts
- Utilize zero quantity materials in your product design.
- Apply lean principles and turn them into daily production plans
- Use Kanban replenishment in bins for backflushed raw materials
- Set up and track shop floor alerts
- Batch Job Operations
- Split Jobs
- Utilize advanced features of Data Collection (MES)

Audience:

- Plant Managers
- Planners and Schedulers
- Production Team Leads
- Controllers and Cost Accountants
- Business Analysts and Kinetic Support Personnel

Prerequisites:

- Knowledge of basic Job Management

Program Level: Intermediate

EE 14: Managing Reports and Communications Using Advanced Print Routing (APR)

Do you want to ensure that your customers always have the information they need when they need it instead of someone missing a manual step? Do you want to have your Epicor system alert the right people when inventory levels are too low instead of someone discovering that there isn't enough stock to fulfil an important order when it might be too late? Do you want to ensure that "that process" some end users have challenges completing according to your business needs is always completed perfectly instead of not being able to trust the information is correct?

This session will focus on demonstrating how to use the robust Epicor Business Process Management (BPM) framework to accomplish these types of tasks and more. It is applicable to on premise and cloud environments.

Cost: There is an additional \$325 fee to attend this session.

Objectives:

- Understand the Epicor BPM framework and the system activities that can be used with BPMs (and when one BPM type may be a better option over another).
- Use client tracing to design and build process automation for inventory adjustment and label printing using a data directive BPM.
- Use UserCodes to store values used by your custom processes to assign sequential codes and number.
- Use the BPM Update Table by Query to update the email notify value on the order head table from the customer contact table using custom business logic.
- Add an authorization process for new customers using alert attachments.

Audience:

- IT/Technical Staff and Epicor Administrators

Prerequisites (foundational level only):

- Reviewing business requirements and establishing data scenarios
- Constructing a BAQ with business logic to detect specific data conditions
- Using workflow elements to construct a Dynamic Query call to your BAQ and evaluate.
- Testing and debugging your BPM components
- Moving re-usable business logic from the BPM into an Epicor Function
- Calling the function using REST

Program Level: Intermediate

EE 15: Epicor Enterprise Content Management (ECM) Advanced Workflow Design for Kinetic

Epicor ECM (DocStar) is better known among Kinetic customers for its AP Automation and Sales Order Automation workflow modules. But did you know you can build your own custom workflows for other areas of your company's operations, such as for simple check-in/check-out of Engineering drawings with approvals? In this hands-on course, you will learn how to design business workflows with approvals.

Cost: There is an additional \$325 fee to attend this session.

Objectives:

- Learn how to configure Workflow
- Explain Workflow design concepts and best practices
- Build simple indexing and storage workflows
- Add OCR recognition to your workflows
- Build conditional branching workflows
- Add approval requests to your workflow
- Build a workflow using DataLinks to other applications/data sources in your environment

Audience:

- IT
- Accounts Payable
- Manufacturing Operations
- Sales Operations

Prerequisites (not a requirement, but recommend you are familiar with):

- Epicor ECM Workflow concepts (available in the Workflow Essentials course)

Program Level: Intermediate

EE 16: Deep Dive Into Automation Studio for Kinetic

Epicor Automation Studio, embedded in Kinetic and powered by Workato, is an award-winning low-code Integration-Platform-as-a-Service (iPaaS) that enables businesses to easily connect apps, systems, and automate processes between previously siloed applications without the use of high-end developers' hard coding. This class is intended for anyone who has a rudimentary understanding of programming concepts and would like to develop their skills as Citizen Developers and Integrators* and will enable them to examine, hands-on, how using Automation Studio will help improve and streamline business process and integrations. You will learn about the capabilities and features of the automation platform as well as how it can be used to automate repetitive operations, boost productivity, and enhance overall performance. In addition, this class will explore real-world examples and best practices for deploying Automation Studio in various business contexts

Note: This class is also offered on Monday, May 15.

Cost: There is an additional \$325 fee to attend this session.

Objectives:

- Building your first recipe
- Identifying trigger conditions
- Data mapping
- Using formula mode
- Adding conditional actions
- Error monitoring and handling
- Repeat action and variables
- Lookup tables

Prerequisites:

- Basic understanding of programming concepts such as if/then/else and looping statements
- Basic understanding of the Kinetic application, that can be derived from such courses as Introduction to Kinetic Course or System Flow

Audience:

- Citizen Developers and Integrators* (business users with little coding experience that build applications or integrations with IT-approved technology)
- System Administrator, Software Developers

Program Level: Intermediate

EE 19: Driving System Enhancements With Application Studio Fundamentals

When customizing your application, you use the Application Studio. This powerful new tool offers drag and drop functionality that enables you to make specific changes and enhancements to your application even if you are not a programmer. Use Application Studio to refine user interfaces to fit your organization or business needs. Through this tool, you can hide fields your company does not use, display proprietary data within your system, add sliding panels to display related data, and other features that improve your return on investment.

Cost: There is an additional \$325 fee to attend this session.

Objectives:

- Navigate the Application map
- Manage Layers
- Data bindings
- Dropdown controls
- Searches
- Add Child DataViews
- Row Rules
- Event Handlers

Audience:

- Software Developers
- System Administrators

Program Level: Beginner

EE 20: Mastering Your Business Processes With Advanced BPM and Functions

Advanced BPM techniques coupled with Epicor Functions now provide the most robust customization and configuration tools in the Epicor system product offering yet. The combination of these tools now provides the same advanced capabilities to all customers that may have previously required building external assemblies only supported in on-premises installations. Functions now leverage the BPM workflow designer functionality to build method independent business logic that can be called from BPMs. Custom code actions are supported and encapsulated inside the functions eliminating the need to build external assemblies.

This class will focus on creating functions to implement required business logic relevant to the challenges of today. You will build BPM's that evaluate data conditions based on data driven parameters and execute the corresponding business logic using only a handful of C# expressions that are supported regardless of the customers hosting model.

Cost: There is an additional \$325 fee to attend this session.

Objectives:

- Review business requirements and establish data scenarios.
- Construct a BAQ with business logic to detect specific data conditions.
- Use workflow elements to construct a Dynamic Query call to your BAQ and evaluate the return values.
- Test and debug your BPM components.
- Move re-usable business logic from the BPM into an Epicor Function.
- Call the function from a UI customization.
- Call the function using REST.

Audience:

- System Administrators
- IT/Technical Staff

Prerequisites:

- Business Activity Queries
- Business Process Management
- Embedded Customization

Program Level: Advanced

EE 21: Leverage Multi Company Functionality in Epicor Kinetic

Through this session, you will learn about the Multi-Site Management module and how it contains a wide range of processes that your large organization can leverage to improve the flow of data between parent and subsidiary companies.

You can use this module to create global records, ensuring a uniform set of data is available within all your companies. You can set up central payments and consolidated purchases to coordinate these processes throughout the organization. Each company can also contain multiple financial books, and the multi-company consolidation process can combine the financial results for each period into a target book in a parent company.

The Multi-Site functionality encompasses all the features which share data across different areas within your organization. You will implement this functionality to match the internal structure and needs of your organization. Leverage these features to share global master records like customers, parts, and suppliers, coordinate purchasing between your divisions, consolidate financial data, and other internal data sharing activities. Implement the features that you need to better coordinate the diverse activities of your entire organization.

Cost: There is an additional \$325 fee to attend this session.

Objectives:

- Update Global Tables
- Maintain Multi-Company GL Accounts
- Assign a Journal Code to a GL Control
- Configure Central Payment/Collection

Audience:

- CFO/Controller
- AP and AR Clerk

Prerequisites:

- Accounts Payable, Accounts Receivable
- Consolidated Payment, Consolidated Purchasing
- General Ledger, Multi Currency
- Inventory Management, Multiple Warehouse
- Multi-Site GL Journals, Multi-Site Management, Multi-Site Publish
- Order Management, Purchase Management
- Shipping Receiving

Program Level: Beginner/Intermediate

EE 22: Understanding and Troubleshooting Material Requirements Planning (MRP) and Scheduling

MRP is a complex process and there may be times when you run into issues of some kind. This session is designed to introduce the primary functions of the Material Requirements Planning (MRP) module. During this session you will review some issues that may occur with the MRP process during different stages of an MRP run and learn how to resolve them.

Cost: There is an additional \$325 fee to attend this session.

Objectives:

- Identify factors that affect material requirements planning performance.
- Understand Internet Information Service (IIS) and the implications on MRP.
- Process MRP using different scenarios.
- Create Dashboards to achieve different MRP troubleshooting objectives.
- Review system task parameters.
- Understand the MRP background processing logic.
- Review the results of a corresponding MRP run.
- Understand the difference between the Net Change and Regenerative MRP runs.

Audience:

- Production Controller
- Material Planner
- Operations Manager
- Scheduler
- Engineers

Prerequisites:

- Navigation
- Inventory
- Engineering
- Job Management

Program Level: Beginner

EE 23: Extend Your SSRS Development With Multiple Interacting Business Activity Queries (BAQs)

This course will provide you with the opportunity to create complex Report Data Definitions via multiple interacting BAQs.

Cost: There is an additional \$325 fee to attend this session.

Objectives

- Create a custom Report Data Definition (RDD) from multiple BAQs.
- Pass multiple parameters to your newly created Report.
- Create Sub Reports in SSRS.
- Add your newly created BAQ reports to your Epicor system menu and display them during runtime.
- Use Microsoft SQL Server Data Tools (SSDT) to visualize Multiple SSRS RDL objects at the same time.
- Use Microsoft SQL Server Management Studio (SSMS) to write SSRS Report queries based off multiple BAQ Queries.

Audience:

- DBA
- SQL Developer
- Report Writer/Developer with strong SQL Background
- IT/Technical Staff with strong SQL Background

Prerequisites:

- Understanding of Application Studio
- Knowledge of SSRS, Crystal Reports, Basic Programming, Advanced SQL report authoring programs
- Knowledge of relational database concepts such as table structure, datatypes, schemas, views, and table relationships
- Understanding of business activity query (BAQ) functionality

Program Level: Intermediate

EE 24: Deep Dive Into Automation Studio for Kinetic

Epicor Automation Studio, embedded in Kinetic and powered by Workato, is an award-winning low-code Integration-Platform-as-a-Service (iPaaS) that enables businesses to easily connect apps, systems, and automate processes between previously siloed applications without the use of high-end developers' hard coding. This class is intended for anyone who has a rudimentary understanding of programming concepts and would like to develop their skills as Citizen Developers and Integrators* and will enable them to examine, hands-on, how using Automation Studio will help improve and streamline business process and integrations. You will learn about the capabilities and features of the automation platform as well as how it can be used to automate repetitive operations, boost productivity, and enhance overall performance. In addition, this class will explore real-world examples and best practices for deploying Automation Studio in various business contexts

Note: This class is also offered on Sunday, May 14.

Cost: There is an additional \$325 fee to attend this session.

Objectives:

- Building your first recipe
- Identifying trigger conditions
- Data mapping
- Using formula mode
- Adding conditional actions
- Error monitoring and handling
- Repeat action and variables
- Lookup tables

Prerequisites:

- Basic understanding of programming concepts such as if/then/else and looping statements
- Basic understanding of the Kinetic application, that can be derived from such courses as Introduction to Kinetic Course or System Flow

Audience:

- Citizen Developers and Integrators* (business users with little coding experience that build applications or integrations with IT-approved technology)
- System Administrator, Software Developers

Program Level: Intermediate

EE 25: Digging Into Your Kinetic Data With Grow, an Epicor Solution

Are you interested in learning more about your Kinetic data? Or looking to learn how to build metrics and dashboards from that data for yourself in the Grow platform? This course is ideal for those who want to learn more about the data they can visualize within the Grow platform. In this session, you will learn what out of the box visualizations are provided for you from the Grow team and how you can build more for yourself. This course provides detail on how to read and understand your data and how to then use that to create your own visualizations.

Cost: There is an additional \$325 fee to attend this session.

Objectives:

- Learn about the available dashboards and metrics
- Read data and search for needed information
- Use datasets to build your own metrics
- Utilize data and chart transforms

Audience:

- Data Analyst
- System Admin
- Team/Department Managers

Prerequisites: None

Program Level: Beginner/Intermediate

EE 28: Expanding System Enhancements With Application Studio: Advanced

Continuing the exploration of Application Studio, this session covers more advanced use cases for customizing your Epicor system. We will explore leveraging the new Application Studio toolset to incorporate data from other services into new change layers to create an enhanced user experience.

Cost: There is an additional \$325 fee to attend this session.

Objectives

- Build Dashboards with updatable BAQs
- Calling service methods passing parameters
- Calling Functions passing parameters
- Calling methods and or functions from event handlers
- Working with Type Script for more advanced custom processing

Audience

- System Administrators
- Software Developers

Prerequisites:

- Business Activity Queries
- Business Process Management
- Embedded Customization

Program Level: Advanced

EE 29: Ensuring Data Integrity With Queries and BPM Directives

Do you want to ensure that your customers always have the information they need when they need it instead of someone missing a manual step? Do you want to have your Epicor system alert the right people when inventory levels are too low instead of someone discovering that there isn't enough stock to fulfil an important order when it might be too late? Do you want to ensure that "that process" some end users have challenges completing according to your business needs is always completed perfectly instead of not being able to trust that the information is correct?

This session will focus on demonstrating how to use the robust Epicor Business Process Management (BPM) framework to accomplish these types of tasks and more.

Cost: There is an additional \$325 fee to attend this session.

Objectives:

- Understand the Epicor BPM framework and the system activities that can be used with BPMs (and when one BPM type may be a better option over another).
- Use client tracing to design and build process automation for inventory adjustment and label printing using a data directive BPM.
- Use UserCodes to store values used by your custom processes to assign sequential codes and number.
- Use the BPM Update Table by Query to update the email notify value on the order head table from the customer contact table using custom business logic.
- Add an authorization process for new customers using alert attachments.

Audience

- IT/Technical Staff
- Epicor administrators

Prerequisites: (foundational understanding of the following):

- Reviewing business requirements and establishing data scenarios
- Constructing a BAQ with business logic to detect specific data conditions
- Using workflow elements to construct a Dynamic Query call to your BAQ and evaluate the return values
- Testing and debugging your BPM components
- Moving re-usable business logic from the BPM into an Epicor Function
- Calling the function using REST

Program Level: Intermediate

EE 30: Advanced Costing Features in Kinetic

In this session you will learn how to take advantage of the advanced costing capabilities that Kinetic offers. This session will focus on advanced costing features such as purchase price variances, landed costs, advanced allocations, posting rules manipulation, project costing, and troubleshooting the WIP report.

Cost: There is an additional \$325 fee to attend this session.

Audience:

- Financial managers
- CFO/Controller
- Cost Accountant
- Engineers

Objectives:

- Learn advanced costing functionality

Program Level:

- Intermediate / Advanced

EE 31: Advanced Inventory Features in Kinetic

Get the most out of your inventory management by learning about Kinetic advanced inventory features. This session will focus on advanced inventory features like WIP and PCID, tracking inventory by revision, using inventory attribute sets, and advanced unit of measure.

Cost: There is an additional \$325 fee to attend this session.

Audience:

- Inventory managers
- Material Planner

Objectives:

- Learn advanced inventory functionality

Program Level:

- Intermediate / Advanced

EE 32: Customize Your Reporting With Drillable Data in Excel Using Spreadsheet Server

Generic-templated reports provide a great starting place, but most businesses need customized reports to be able to put data into context and make it easier to connect to meaningful insights. In this session, Spreadsheet Server product experts will show you how you can customize and automate data in Excel to create custom reports to meet your specific business needs. This session is lead by InsightSoftware.

Cost: There is an additional \$325 fee to attend this session.

Objectives:

- Build comprehensive reports without relying on IT
- Learn how to report on financial and operational data
- Become familiar with Query Designer
- Build automated distribution of Spreadsheet Server reports

Audience:

- Everyone who needs to report on data

Prerequisites: None

Program Level: All levels – (Beginner/Intermediate/Advanced)

EE 33: Introduction to Epicor CPQ

Are you interested in learning more about Epicor CPQ to configure, price, and quote your custom products? This course is ideal for both business and technical contributors who are new to CPQ. In this hands-on session, you will learn configurator design basics as well as creating the user interface (UI) for a configurator, connecting data tables, writing business logic with Snap code, and adding a realistic 3D scene to your configurator.

Cost: There is an additional \$325 fee to attend this session.

Objectives:

- Administer the Epicor CPQ system
- Create a user interface (UI) for your configurator
- Store data in tables and connect the data to your configurator
- Drag-and-drop to build business logic using Snap, the intuitive programming language of Epicor CPQ
- Learn the basics of 2D and 3D visualization
- Feature Preview: Learn how templates can jump-start your own configurator development.

Audience:

- 3D Scene Designer
- Business Analysts
- Configuration Engineer
- System Administrator

Program Level: Beginner