Meeting Minutes

The Regular quarterly meeting of the VMUG was called to order at 10:08 a.m. on Friday, February 8th at Impecca Restaurant located in Roselle, Illinois. Calvin Dekker served as moderator for addressing opening business.

In anticipation of the Epicor Insights Conference scheduled in May, volunteers were requested to summarize the events highlights at the August VMUG meeting. Dave Miller, Gordon Erickson and John Seracki all indicated that they would be attending Insights and would be able to share their feedback.

Members were reminded to complete the meeting surveys before the end of the day, with special note being made regarding the request for topics.

The morning presentation consisted of a Panel discussion led by Gordon Erickson from Kwalyti and Dave Miller of Prince. The primary topic for discussion was the companies' experiences upgrading to Epicor 905. Discussion focused first on "how we got there" and transitioned into "top reasons to upgrade" with strong audience interaction and participation on several inter-related topics. A copy of the prepared list of top 10 reasons to Upgrade is attached to the end of the meeting minutes. Highlights of the panel discussion and audience questions follow:

A brief background of panel participants' upgrade experience was provided. Kwalyti upgraded from 904 to 905. As an organization, Kwalyti tends to go with each upgrade/update. It is a smaller shop, but it does utilize pretty much every module.

Prince upgraded from 601 to 905. Referred to transition as a re-implementation rather than upgrade. Prince has 3 US divisions, 2 overseas; locations have about 40 full users and about a dozen MES seats (5 MES for overseas). They are contract manufacturing focused. Also use pretty everything "quote to cash," including quality, scheduling, etc. except payroll. It does use multi-company and will be using multi currency in near future.

Prince Using IQS with the maintenance through them. Another meeting participant indicated that her company has to go through Epicor to get to IQS.

Dave indicated that Prince has had some challenges with IQAS. Have it about 60% implemented (gauge calibration and tracking, etc.). Prince has been very happy with the aspects of IQS that have been implemented. Did not use the Epicor enhanced quality module, went straight to IQS so cannot give perspective relative to the "out of the box" Quality Module option.

An audience member raised the question regarding the approximate price for IQS. Several members offered feedback. It was noted that IQS is a standalone product – the IQS developers built bridge to Epicor. IQS includes cost of quality, etc.

The question was proffered to the panel: "How has experience been with 9.05?"

Kwalyti – thought they would experience significant gain speed. Speed improved, but upgrade didn't give quite what Kwalyti anticipated. Overall the software use has been pretty smooth. Example Stock Status report – in previous version would take 30 minutes, and weren't even sure if it was running. Now it's 'quick.' Customization in 905 is much easier. Example: changing Job Traveler Report was difficult in 8.0 now simpler. Also, have reduced paper usage – was printing landscape in previous version.

Prince reason was mainly technology improvement (6 to 9). Have taken advantage of being able to have multiple screens, multiple functions open at once. Noted the ability of updatable BAQs. EDI was in 6, but wasn't strong; 905 improvement. 64 bits clients – overhead standpoint an improvement.

Additional discussion related to multiple screens/functions. Example: Users can have job manager and job tracker on two screens and keeps it in sync.

Another audience member asked whether any core modules were better or worse.
- *EDI – (going 8 to 9) decrease. (6 to 9) increase.*
- *Improvement: List view for part table, customer, etc. export/import improve via excel*
- *Upgrade hardware – yes both server and desktops (601 TO 905.601 – NOW at 701)*

Panel participants were then asked to provide feedback regarding company upgrade culture.

Kwalyti – upgrade pretty much every time. Has the advantage of being able to train every time due to size (18 users). Will put an upgrade on a laptop to test for 2 months prior to live and pass from user to user to test. Have a test procedure for each conversion. Go from quote to cash in test environment.

Prince reiterated process was approached more as a reimplementation.

Audience query: "Any compatibility issues with desktop software?"
Prince pretty much everything but Windows 8. Bandwidth required to keep the active desktop running – too much for a company.

Discussion then returned to addressing more 905 improvements:
- *more 3rd party products*
- *Microsoft Excel connect,*
- *Quality improved.*
- *Ability to customize*
- *BAQ designer with graphical interface. Have ability to have a BAQ to write back to system.*
- *Updatable dashboards*
- *User security improved.*

A reminder was offered that with 905 users have to save more often. If refresh is made without save, work will be lost.

Gordon noted that Kwalyti is not on solid state drives. An audience member responded: use solid state drives, you will not regret it. The improvement will not so much seen on daily activities – moreso in the reporting. Another member commented on the option of Fusion IO drives – approx. $7000 per server – but "uber fast."

Hint was offered to attendees to improve performance: truncate BI file (all versions) – put it in backup routine.

BAQ discussion prompted another hint related to print requests – immediate run request. Karen Schoenung @ Fisher Barton wrote a BAQ to notify when the printer stops. (More than 3 tasks go into immediate request).

A short term side track led to general group discussion with various issues and resolutions:

- *One issue user ran into related to part tracker search – not looking only into part tracker table, but also looking through all other tables – threw searches off. There was a repair… SCR…*
- *In 905 – system monitor was fixed – can see what's in queue so you can remove the duplicate print jobs.*
- *701 – problems with searches. SQL issue (index rebuild).*
- *Certain part numbers if letter or dash – throwing off.*

Returning to the topic at hand, Dave reiterated the usefulness of the DMT – "great tool." Pretty straight forward – will tell you required fields, will give log file to show records that didn't go in and will dump missed records into a csv file so you can clean and reuse. Note: the user has to load in order. DMT also allows for scrubbing of data. Be aware, user sometimes need to put a dummy record in place to save records related, then upload and run DMT to delete dummy records.

It was also noted that DMT could be used to load EDI data.

GL Import – can import transactions from the past – and JE for balance/period

Data upgrade tool available to go 803.410 to 905.700 (Data Upgrade Utility). "has it down to about 4 clicks – once you clean up unit of measure."

A general discussion regarding maintenance held audience attention for several minutes.

The upgrade discussion was wrapped up with a final though offered by Kevin Gallager: be aware of the Windows version supported (E9 – Windows 2012 certified) Windows 8 607 and above 700 series 10 version on Windows 8 platform. Epicor is now in process for taking bidders for Epicor 10. Interested companies can contact Kevin (T 815-893-6523 / kgallagher@epicor.com) Projected release date – probably second quarter this year; anticipate demos @ Insights.

The first afternoon session was a review of tips and tricks for the User Group led by Bill Golis of CodaBears. His presentation main points are highlighted below:

- *Set up Favorites. Good time saver, makes environment more inviting. From any screen in Vantage, right click and choose favorites bar.*
- *Screen Personalization. Difference between personalization and customization. Personalization is per user – that will follow that person's logon. Things done to screens, such as hot key shortcuts and screen layout. For example can set up shortcut for screen (i.e. set up F5 to pull up a search screen – or switch Enter to move tab forward, change preview of columns displayed – remember for all these changes "save settings on exit")*
- *Reset to Base – always can reset if user has "lost" a field.*
- *Menu Customizations: Can add menu items that come from different areas – might make accessing simpler for one department vs. another. Can also create a new menu.*
- *Can write a BAQ against menu to see what all customizations you have*
- *Create customizations before users start getting to personalization because they'll be "blown away" if you do so after the fact.*
- *Modules*
  - *Sales Management*
  - *Service Management*
  - *Production Management*
  - *Material Management*
  - *Financial Management*
  - *Executive Analysis*
  - *System Management*
- *BAQ Zones*
- *BAQ Reports using Indexes*
- *Business Activity Manager*
- *Business Process Management*
- *Business Activity Query*
- *Dashboards*
- *Customizations*

The final education session for the meeting was a review of Lessons Learned in 2012, including reminders for the membership on important rules of thumb such as testing back-ups and protecting the organization by creating detailed specs for programming requests. Calvin Dekker of CodaBears also highlighted a useful tool that already resides in Windows 7 PSR (Problem Step Recorder): users can record issue and then can email to the IT Manager or Epicor to show the error message and applicable details of user interface.

Calvin's presentation main points are highlighted below:

1. *Purchasing services / Protecting Your Company*
2. *Backing up & Testing a Restore*

3. *Stress testing in Pilot versus Live*
4. *Multiple Sources of information before taking questionable action*
5. *Sales sample zero dollar invoices error if first in group*
6. *Single checks in payment entry can display errors on the group after printing*
7. *Applied labor & burden on STK transactions in 700 – One Off Fix/Posting Rule from Support*
8. *DMT takes non xml characters and loads them into Epicor.*
9. *Windows Server 2008-R2 Task Scheduler runs as a low priority job slowing down the server.*
10. *MES Licenses are separate from Full Licenses and they cannot roll downward anymore.*
11. *Email automations - PO Confirmations, Quotes, SO Acknowledgements, Shipment Notifications*
12. *Job Nesting & Batching*
13. *Supplier Report Card*
14. *Job Traveler Packet Print*
15. *UPS & FedEx Integration w/o Agile or Insite*
16. *BOM Exporter*
17. *Vendor Purchasing Automation after 3rd RFQ returns for required materials.*
18. *PDF Doc Scanner reporting page sizing for automated printing*
19. *Bartender Print Automation*

The meeting concluded at 4:00 p.m.

The next regular scheduled VMUG quarterly meeting is Friday, May 10th. Topics for presentation may be provided at any point via the VMUG website: http://vantageusers.org/Contact.aspx The formal call for topics will be sent to membership in April.