

The Regular Quarterly Meeting of the Midwest User Group was called to order at 10:06 a.m. on Friday, May 16th at Pilot Pete's Restaurant located in Schaumburg, Illinois. Calvin Dekker served as moderator for addressing opening business.

It was noted that the group is now entering its 20th year.

Calvin reviewed the important dates coming up for the next two quarters' meetings, including a change of date:

Quarter Three; August 22, 2014 – **NEW DATE**

Quarter Four; November 14, 2014

Calvin Dekker gave a presentation entitled My Bytes, a variety of tips, hints and tricks for various versions of Epicor. A fully copy of the presentation is appended to the end of the minutes. Calvin touched on topics such as

- User Codes - which can be used for items such as repetitive combo boxes, custom field features, etc.
- Context Menu Maintenance - can customize right click options – such as opening excel file, URL or customize the Epicor right click options
- External BAQs - example, write a BAQ against WorldShip) (Mark Olbrantz mentioned he had attended an Insights Lab for What's new in E10 from Sunday afternoon class has a great deal of information on this tool
- BAQs
- BAQ Analyze – can now get information on query execution
- BAQ Where Used – can see what's linked to the BAQ so you know what's affected (except Forms)
- Report Maintenance – including report types and output locations
- Method Directives – Now a graphical designer in 10
- BPM Workflow Designer

Fred Zelhart of CodaBears, Inc. provided the second training session regarding SQL. His presentation included more focused perspective on reporting the data:

- BIDS (Business Intelligence Development Studio) – recommend using for developers who are working with multiple reports. Report Builder certainly sufficient for one report at a time. Different interfaces, same report result. BIDS makes working with report, subreport, etc. simpler.
- Visual Studio allows for Project with multiple reports (Solution would allow for multiple Projects)
- Shared datasources. Datasource is a connection to a database. Use this because it allows for the transition between test environment to Live simpler. Report just looks for the datasource, not the specific location (test vs live). (Embedded connection is default)
- Recommend creating templates (before including the datasource) to use again and again
- Dataset (basically result of a query)

After the break for lunch and networking, the meeting reconvened with an open forum reviewing Insights and some of the highlights of the conference.

- Overall enthusiasm for what Epicor 10 is now offering
 - Performance is a large factor
 - Recurring AP invoices, etc. are a nice improvement
- Feedback related to training was more related to technical aspects which was useful, but not advanced enough
- Seemed like less frustration in labs/crashes in working with product. Greater stability, etc.
- Benefit of saving attachments and using “down the line” in the process looks exciting
- Big change for customers heavily invested in Progress Code will have a large undertaking in making the transition
- Looking forward to improvement to BPM area
- Improved Performance and Improved Report Performance
- Great Extended classes. Performance Diagnostic Tool and Updatable Dashboards were great.
- Document Sender – New Feature or also Document Sender the new Product (.Net IT)
- E10 Beta User session was very strong
- Saturday / Sunday Classes are very strong/useful for in depth learning
- Networking was extremely valuable, especially if you’re heading into a project undertaking a similar path
- More specifics in terms of what’s going to be covered in classes (course descriptions could be improved) – or start breaking some of the classes into beginner and advanced portions
- Significantly increased number of “add-on” products since the SQL platform creates an increased opportunity
- Vastly improved conversion time potential

Dates for next year May 18-21st in Nashville. Extended Education starts May 16th.

Calvin Dekker of CodaBears Inc. gave the final presentation of the day, which was a look at Epicor 10.600.3 via a VPN. The method for demonstration was chosen specifically to demonstrate the speed improvements. Prior to the demonstration, he reviewed some basic information regarding Epicor 10 including:

- Infrastructure
- Menus – Classic, Tiles, Custom, etc.
- Look at a real Epicor 10.600.3 test database.

A copy of the presentation is appended to the end of the meeting minutes.

The meeting concluded at 3:00 p.m.

The next regular scheduled Epicor Midwest User Group Quarterly Meeting is scheduled Friday, August 22, 2014.



My-Bytes



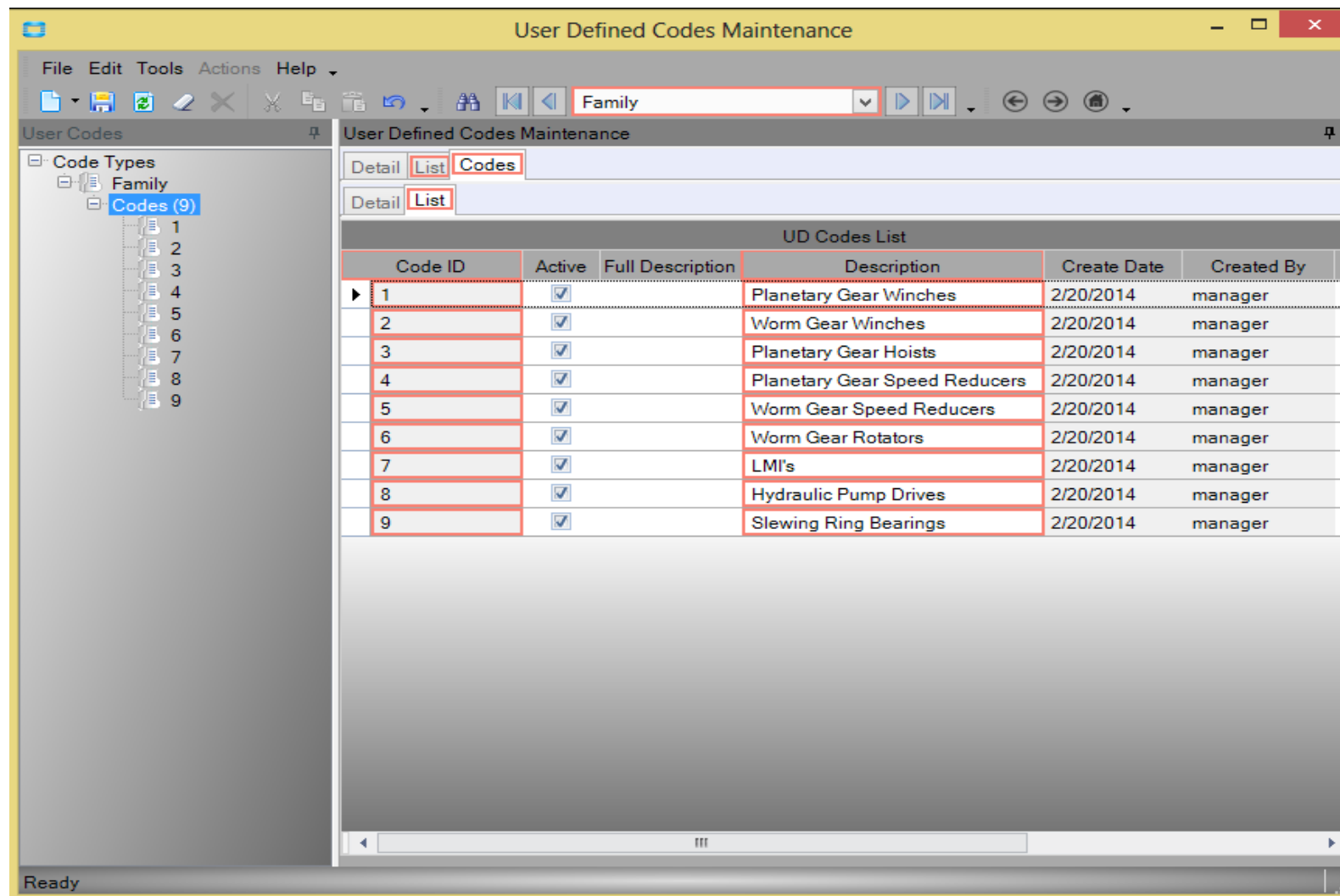
User Codes

Code Types

1. ID
2. Active / Inactive
3. Description

Use for:

- Colors
- Brands
- Families
- Sub-Classes
(Part/Customer/Vendor)
- Sub-Groups
(Part/Customer/Vendor)

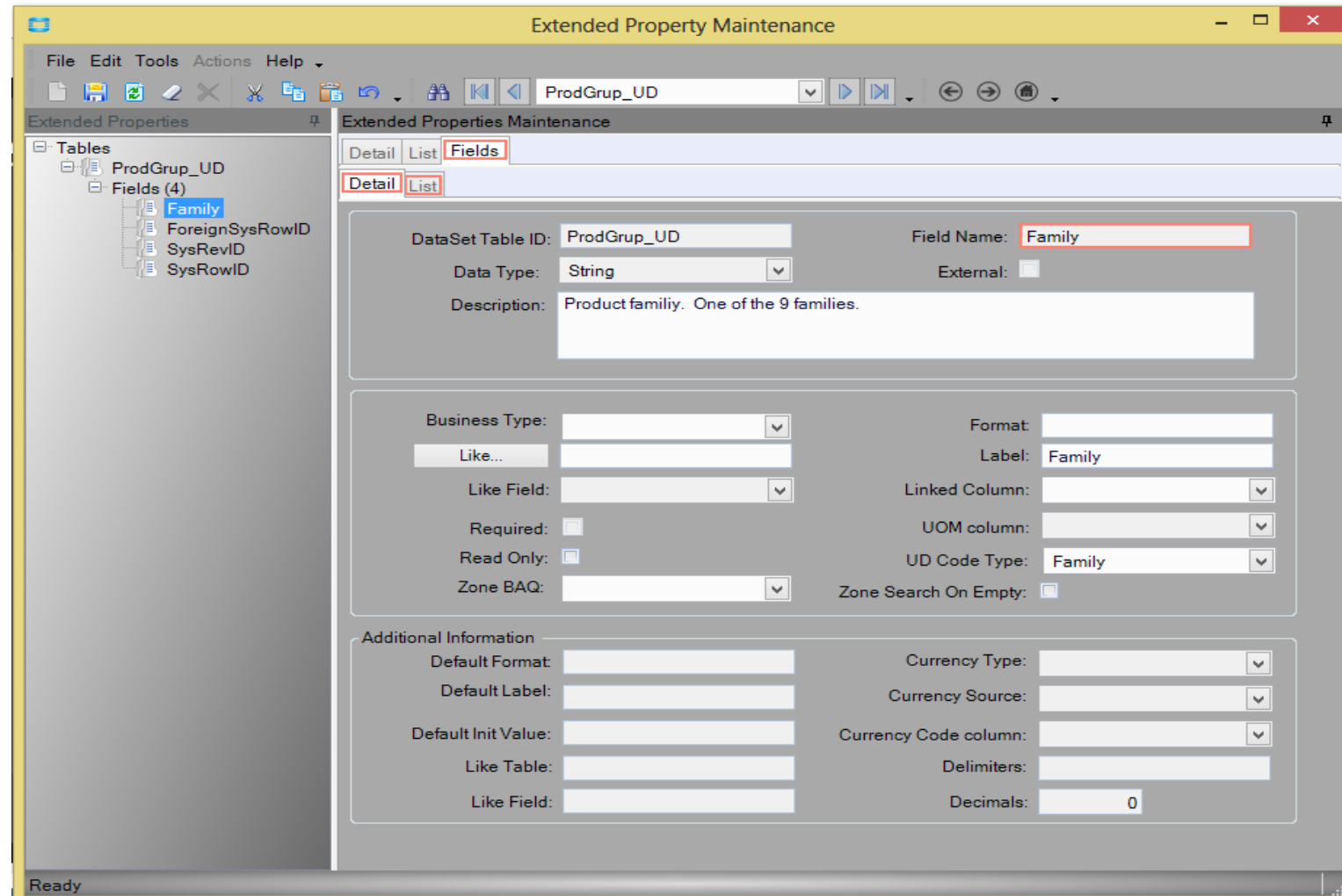


Code ID	Active	Full Description	Description	Create Date	Created By
1	<input checked="" type="checkbox"/>		Planetary Gear Winches	2/20/2014	manager
2	<input checked="" type="checkbox"/>		Worm Gear Winches	2/20/2014	manager
3	<input checked="" type="checkbox"/>		Planetary Gear Hoists	2/20/2014	manager
4	<input checked="" type="checkbox"/>		Planetary Gear Speed Reducers	2/20/2014	manager
5	<input checked="" type="checkbox"/>		Worm Gear Speed Reducers	2/20/2014	manager
6	<input checked="" type="checkbox"/>		Worm Gear Rotators	2/20/2014	manager
7	<input checked="" type="checkbox"/>		LMI's	2/20/2014	manager
8	<input checked="" type="checkbox"/>		Hydraulic Pump Drives	2/20/2014	manager
9	<input checked="" type="checkbox"/>		Slewing Ring Bearings	2/20/2014	manager

User Codes

Used through
Extended Property
Maintenance

1. Add a field
2. Set the UD Code Type

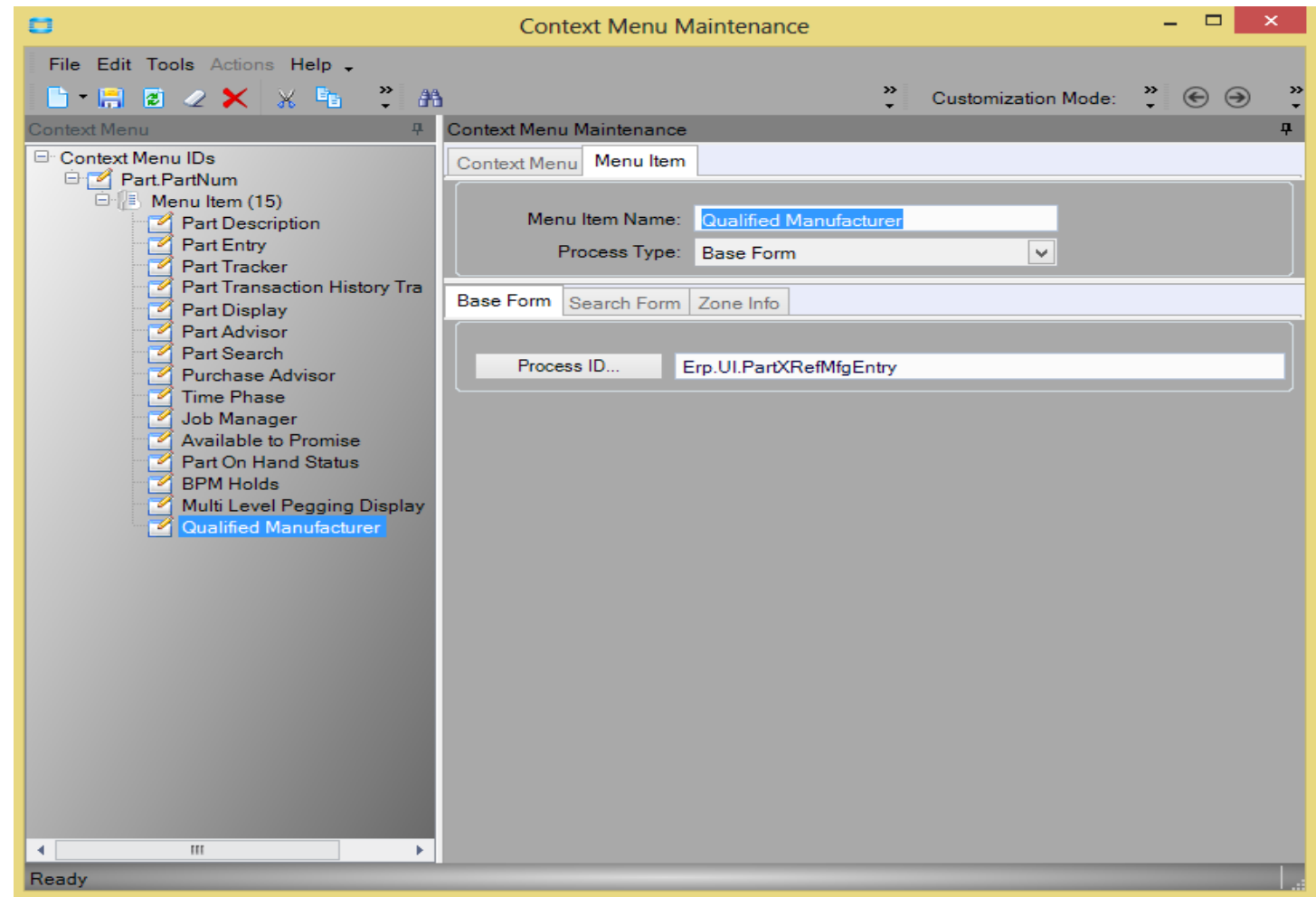


The screenshot shows the 'Extended Property Maintenance' application window. The title bar reads 'Extended Property Maintenance'. The menu bar includes 'File', 'Edit', 'Tools', 'Actions', and 'Help'. The main window is divided into two panes. The left pane, titled 'Extended Properties', shows a tree view with 'Tables' containing 'ProdGrup_UD' and 'Fields (4)' containing 'Family', 'ForeignSysRowID', 'SysRevID', and 'SysRowID'. The right pane, titled 'Extended Properties Maintenance', shows the configuration for the 'Family' field. The 'DataSet Table ID' is 'ProdGrup_UD' and the 'Field Name' is 'Family'. The 'Data Type' is 'String' and 'External' is unchecked. The 'Description' is 'Product family. One of the 9 families.' Below this, there are fields for 'Business Type', 'Format', 'Label' (set to 'Family'), 'Like...', 'Like Field', 'Linked Column', 'Required' (unchecked), 'Read Only' (checked), 'UOM column', 'UD Code Type' (set to 'Family'), 'Zone BAQ', and 'Zone Search On Empty' (unchecked). At the bottom, there is an 'Additional Information' section with fields for 'Default Format', 'Default Label', 'Default Init Value', 'Like Table', 'Like Field', 'Currency Type', 'Currency Source', 'Currency Code column', 'Delimiters', and 'Decimals' (set to '0'). The status bar at the bottom left shows 'Ready'.

Context Menu Maintenance

Select Business/Data Item

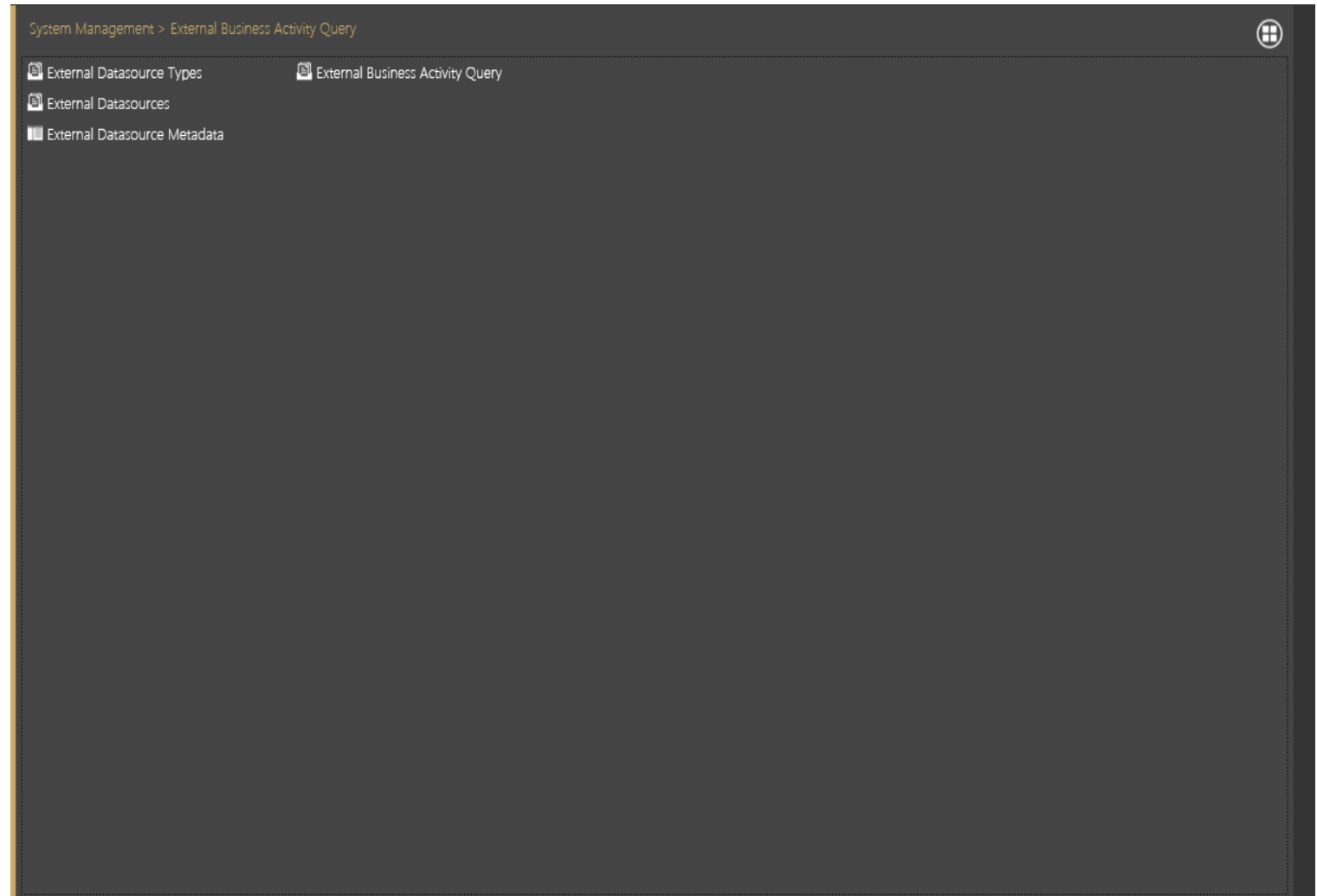
1. Menu Items
2. Context Menus
3. Process ID (system & custom)
4. Zone Links



External BAQs

External Data Sources

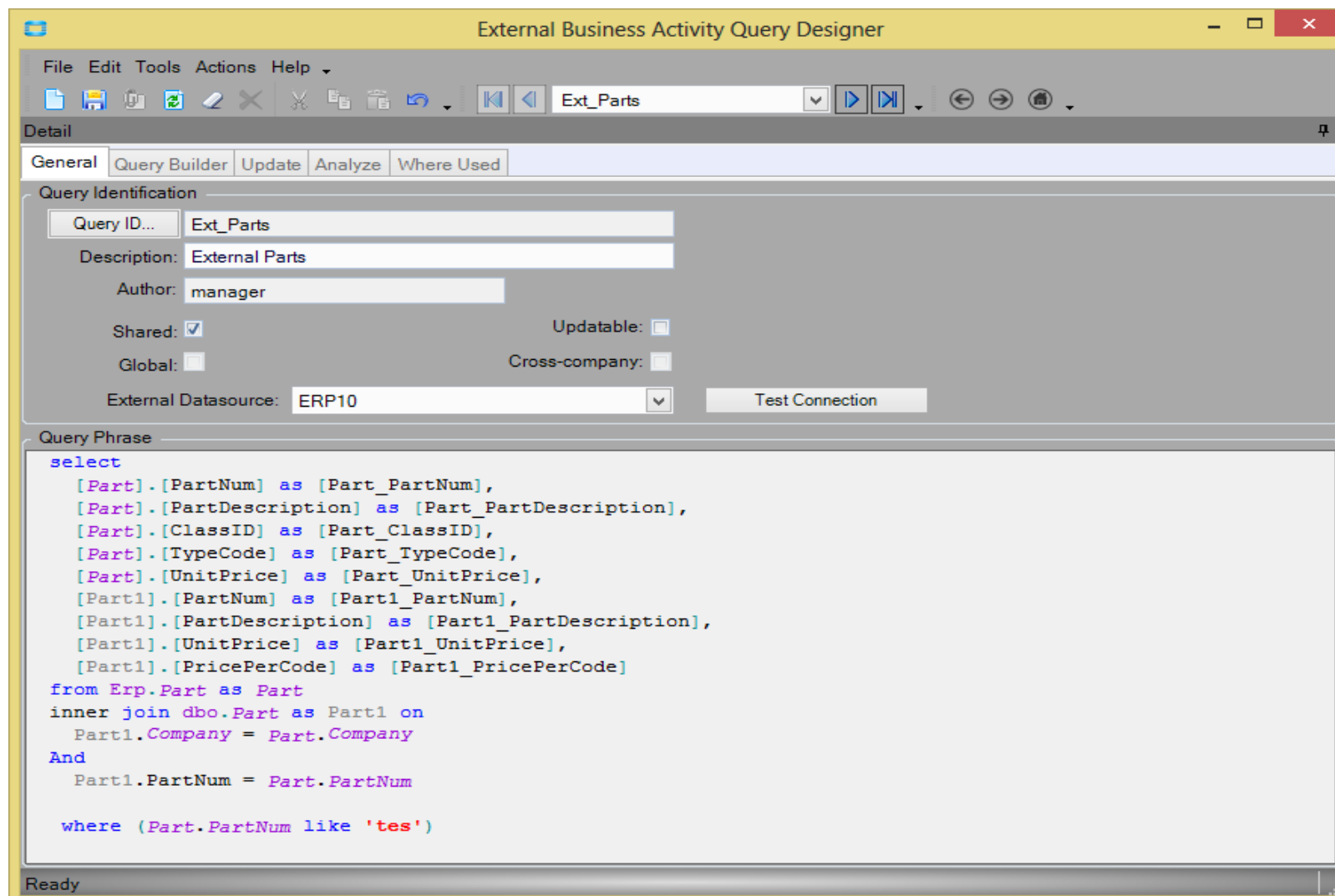
1. Datasource Types
2. Datasources
3. Metadata
4. Server Side



External BAQs

Query Designer

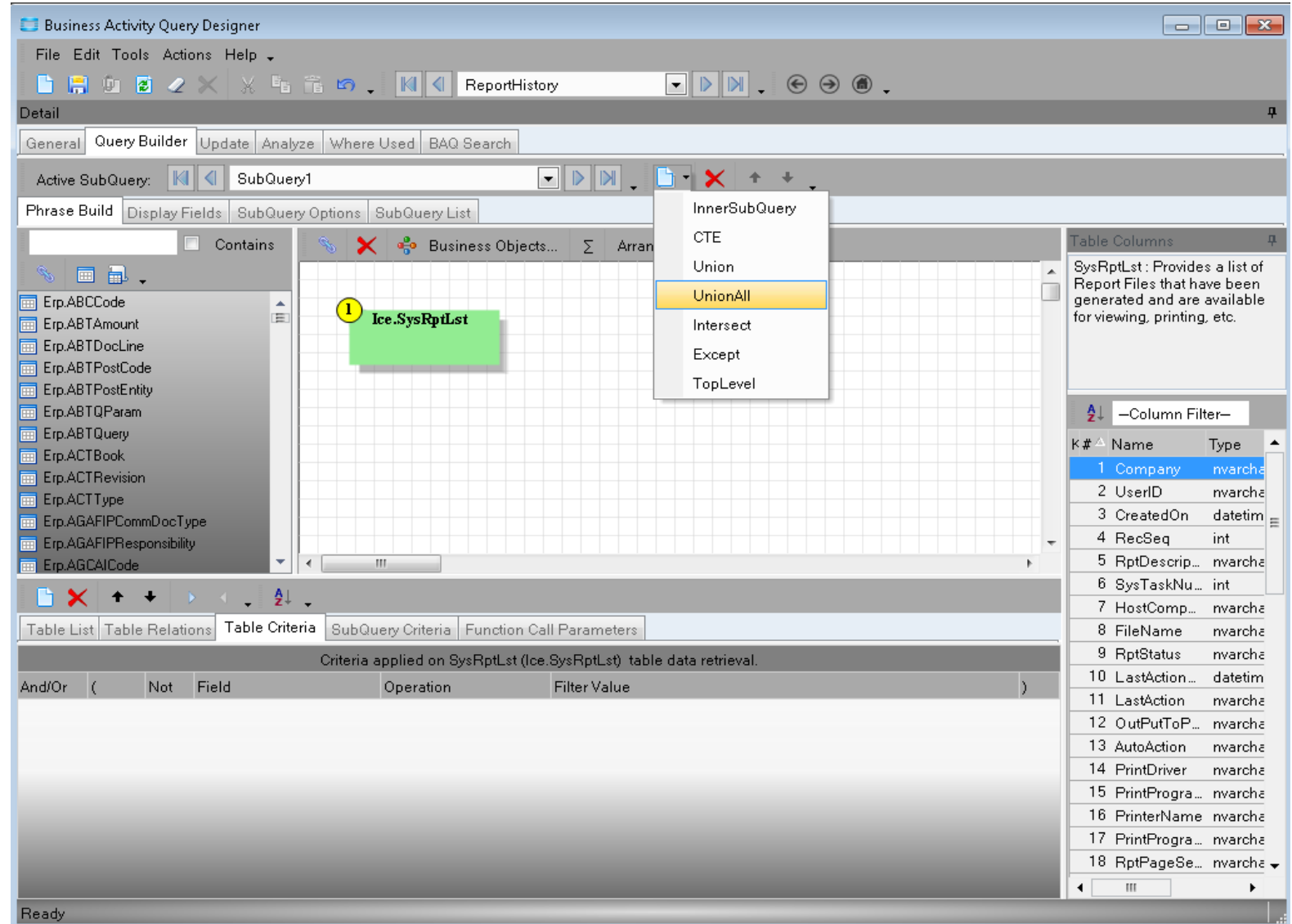
1. General (SQL Scripts)
2. External Datasource



BAQs

Query Builder

1. Phrase Builder
2. Display Fields
3. SubQuery(ies) Options
4. SubQuery List
5. Join Types



The screenshot shows the Business Activity Query Designer (BAQ) interface. The 'Query Builder' tab is active, and a context menu is open over a table object labeled 'Ice.SysRptLst'. The menu options are: InnerSubQuery, CTE, Union, UnionAll (highlighted), Intersect, Except, and TopLevel.

The interface includes a 'Table Columns' panel on the right showing the structure of the 'SysRptLst' table:

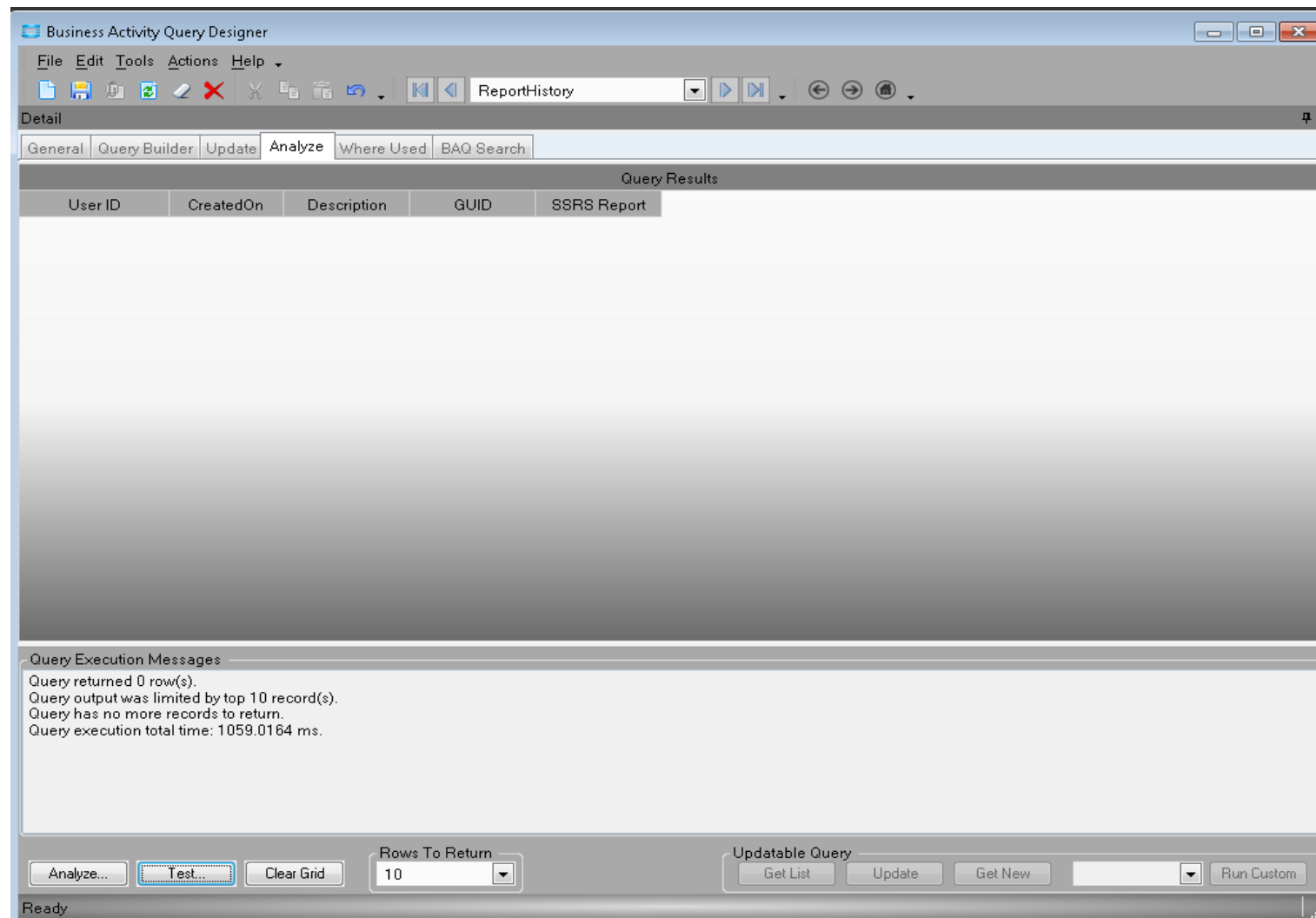
K#	Name	Type
1	Company	nvarche
2	UserID	nvarche
3	CreatedOn	datetim
4	RecSeq	int
5	RptDescrip...	nvarche
6	SysTaskNu...	int
7	HostComp...	nvarche
8	FileName	nvarche
9	RptStatus	nvarche
10	LastAction...	datetim
11	LastAction	nvarche
12	OutPutToP...	nvarche
13	AutoAction	nvarche
14	PrintDriver	nvarche
15	PrintProgra...	nvarche
16	PrinterName	nvarche
17	PrintProgra...	nvarche
18	RptPageSe...	nvarche

The bottom section of the interface shows the 'Table Criteria' tab, which is currently empty, with a header for 'Criteria applied on SysRptLst (Ice.SysRptLst) table data retrieval.' The header includes columns for 'And/Or', 'Field', 'Operation', and 'Filter Value'.

BAQ Analyze

Analyze

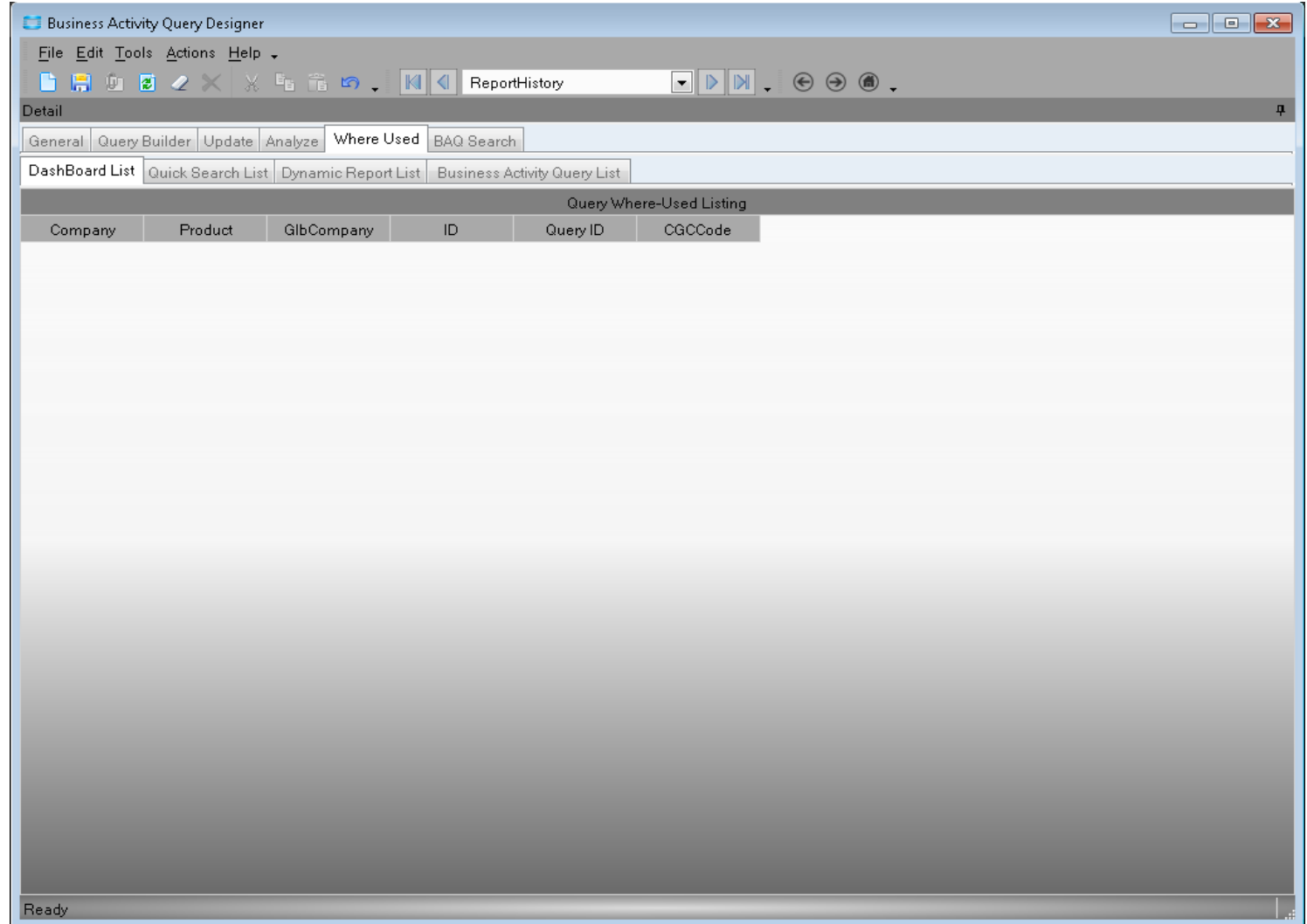
1. Query Execution Messages
2. Rows to Return
3. Analyze / Test / Clear Grid



BAQ Where Used

Where Used

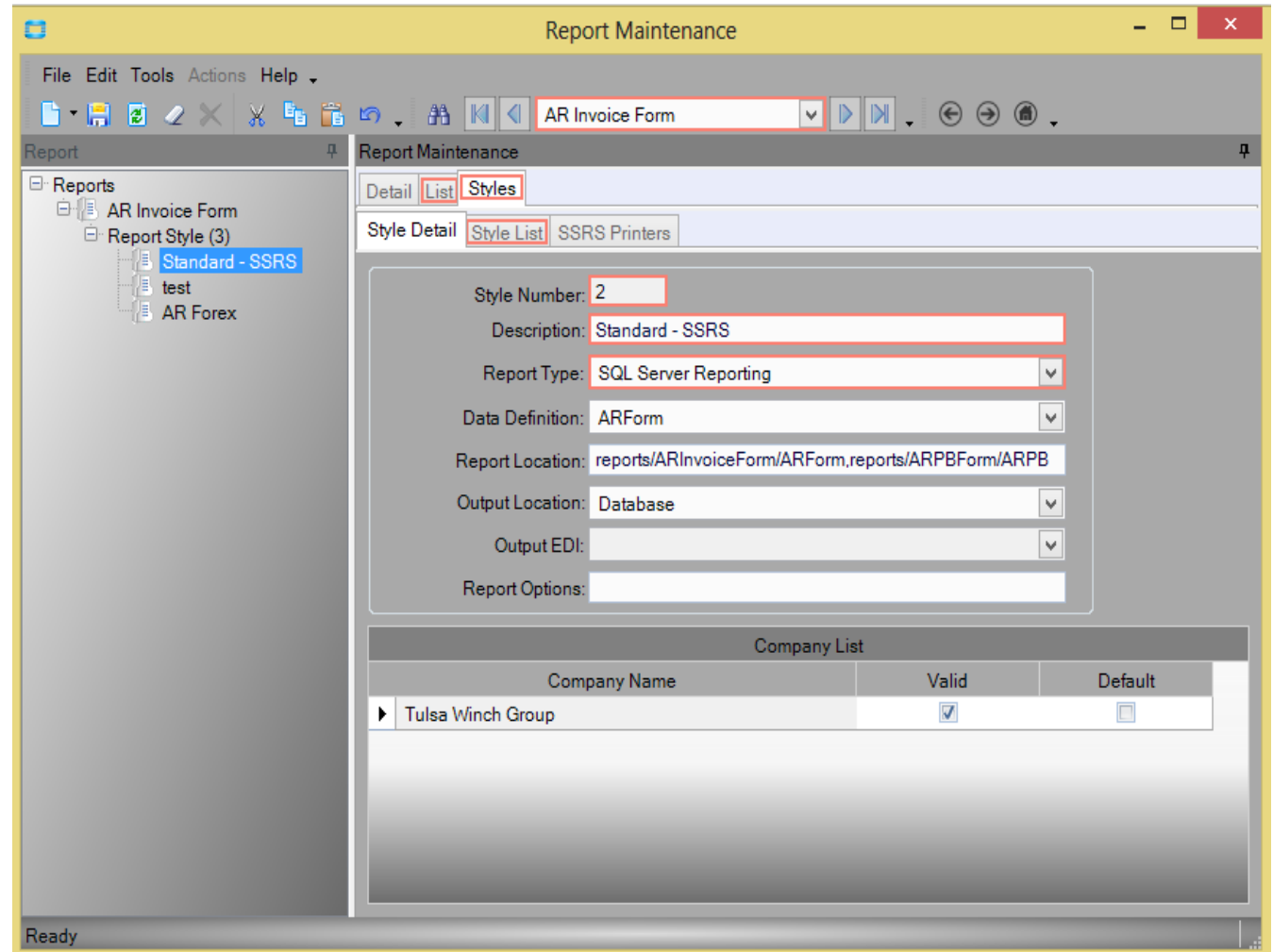
1. Dashboard List
2. Quick Search List
3. Dynamic Report List
4. BAQ List
5. No **FORMS** usage



Report Maintenance

Report Styles

1. New Layout for extra data
2. Works same as 8 & 9



The screenshot shows the 'Report Maintenance' application window. The 'Report' pane on the left shows a tree view with 'AR Invoice Form' expanded to 'Report Style (3)', where 'Standard - SSRS' is selected. The main pane shows the 'Style Detail' tab for 'Standard - SSRS'.

Style Detail fields:

- Style Number: 2
- Description: Standard - SSRS
- Report Type: SQL Server Reporting
- Data Definition: ARForm
- Report Location: reports/ARInvoiceForm/ARForm,reports/ARPBForm/ARPB
- Output Location: Database
- Output EDI: (empty)
- Report Options: (empty)

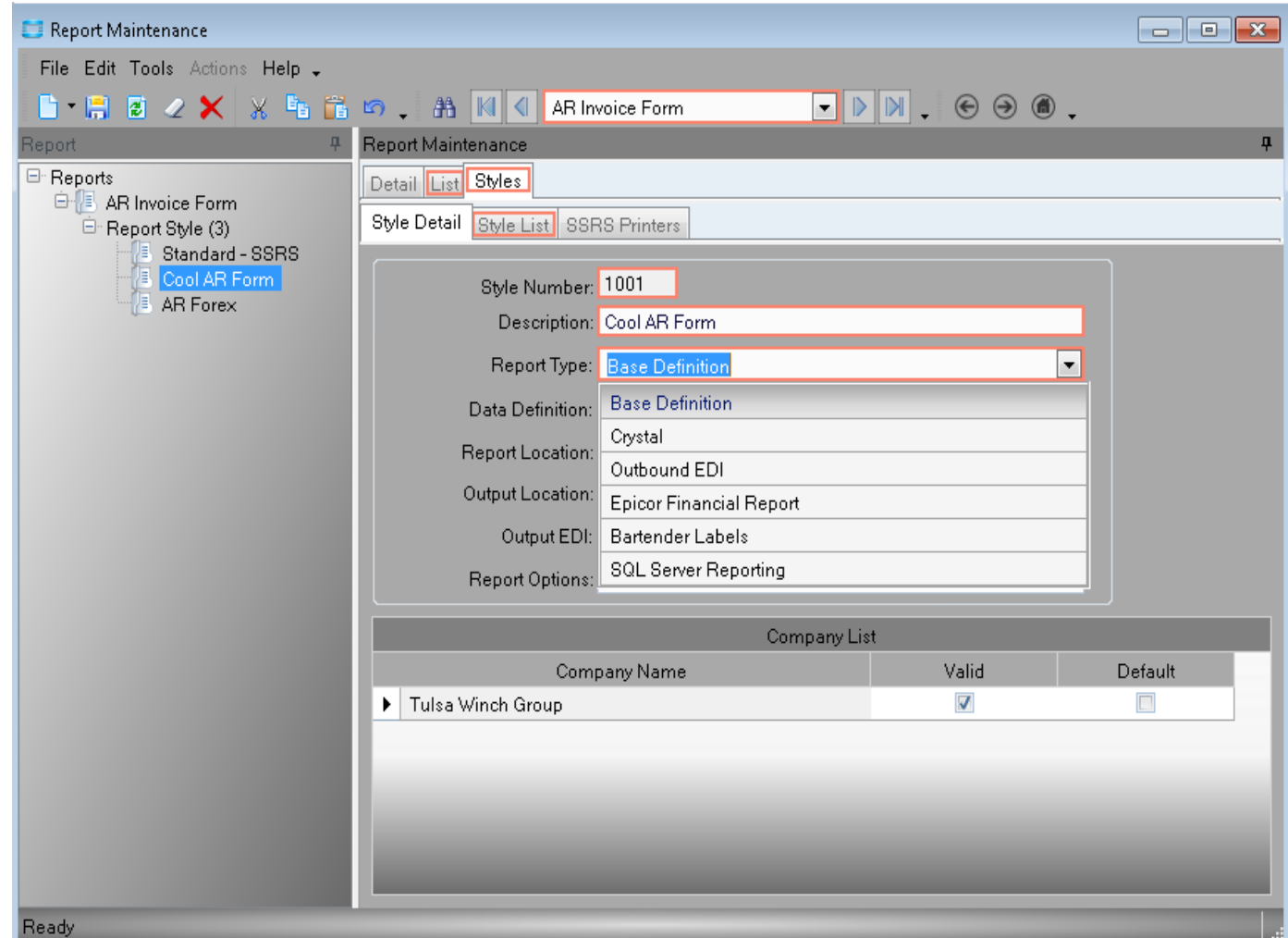
Below the fields is a table titled 'Company List' with the following data:

Company Name	Valid	Default
▶ Tulsa Winch Group	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Report Maintenance

Report Types

1. Base Definition
2. Crystal
3. Outbound EDI
4. Epicor Financial Report
5. Bartender Labels
6. SQL Server Reporting



The screenshot shows the 'Report Maintenance' application window. The title bar reads 'Report Maintenance'. The menu bar includes 'File', 'Edit', 'Tools', 'Actions', and 'Help'. The toolbar contains various icons for file operations and navigation. The main window is divided into several sections:

- Report Maintenance** (Main Panel):
 - Tabs: Detail, List, Styles (selected)
 - Sub-tabs: Style Detail, Style List, SSRS Printers
 - Form Fields:
 - Style Number: 1001
 - Description: Cool AR Form
 - Report Type: Base Definition (dropdown menu)
 - Data Definition: Base Definition
 - Report Location: Crystal
 - Output Location: Epicor Financial Report
 - Output EDI: Bartender Labels
 - Report Options: SQL Server Reporting
- Company List** (Table):

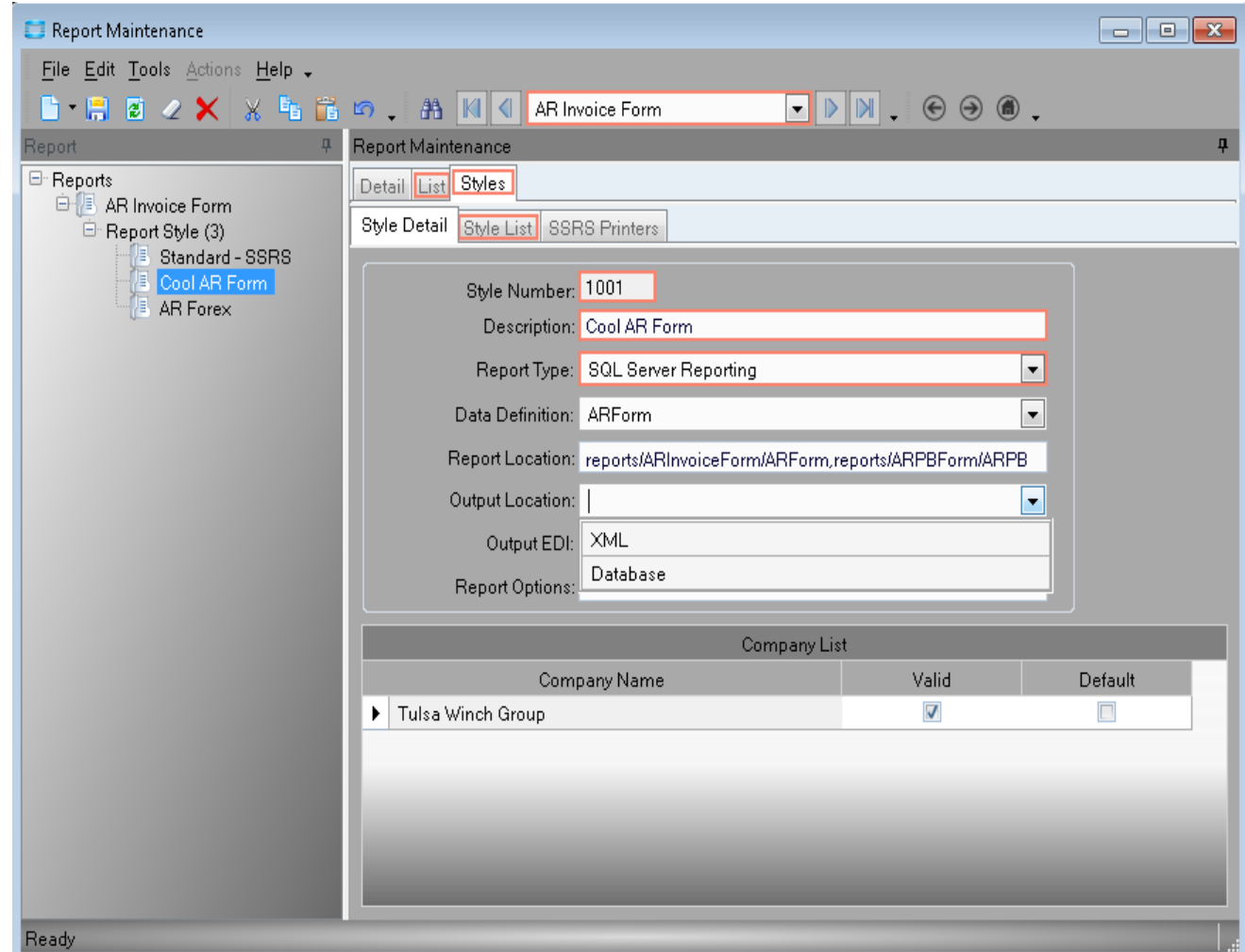
Company Name	Valid	Default
▶ Tulsa Winch Group	<input checked="" type="checkbox"/>	<input type="checkbox"/>
- Report** (Left Panel):
 - Tree View:
 - Reports
 - AR Invoice Form
 - Report Style (3)
 - Standard - SSRS
 - Cool AR Form (selected)
 - AR Forex

The status bar at the bottom left indicates 'Ready'.

Report Maintenance

Output Locations

1. XML
2. Database



The screenshot shows the 'Report Maintenance' application window. The 'Report' pane on the left shows a tree view with 'AR Invoice Form' expanded to 'Report Style (3)', where 'Cool AR Form' is selected. The main pane shows the 'Style Detail' for 'Cool AR Form' with the following configuration:

- Style Number: 1001
- Description: Cool AR Form
- Report Type: SQL Server Reporting
- Data Definition: ARForm
- Report Location: reports/ARInvoiceForm/ARForm,reports/ARPBForm/ARPB
- Output Location: (empty)
- Output EDI: XML
- Report Options: Database

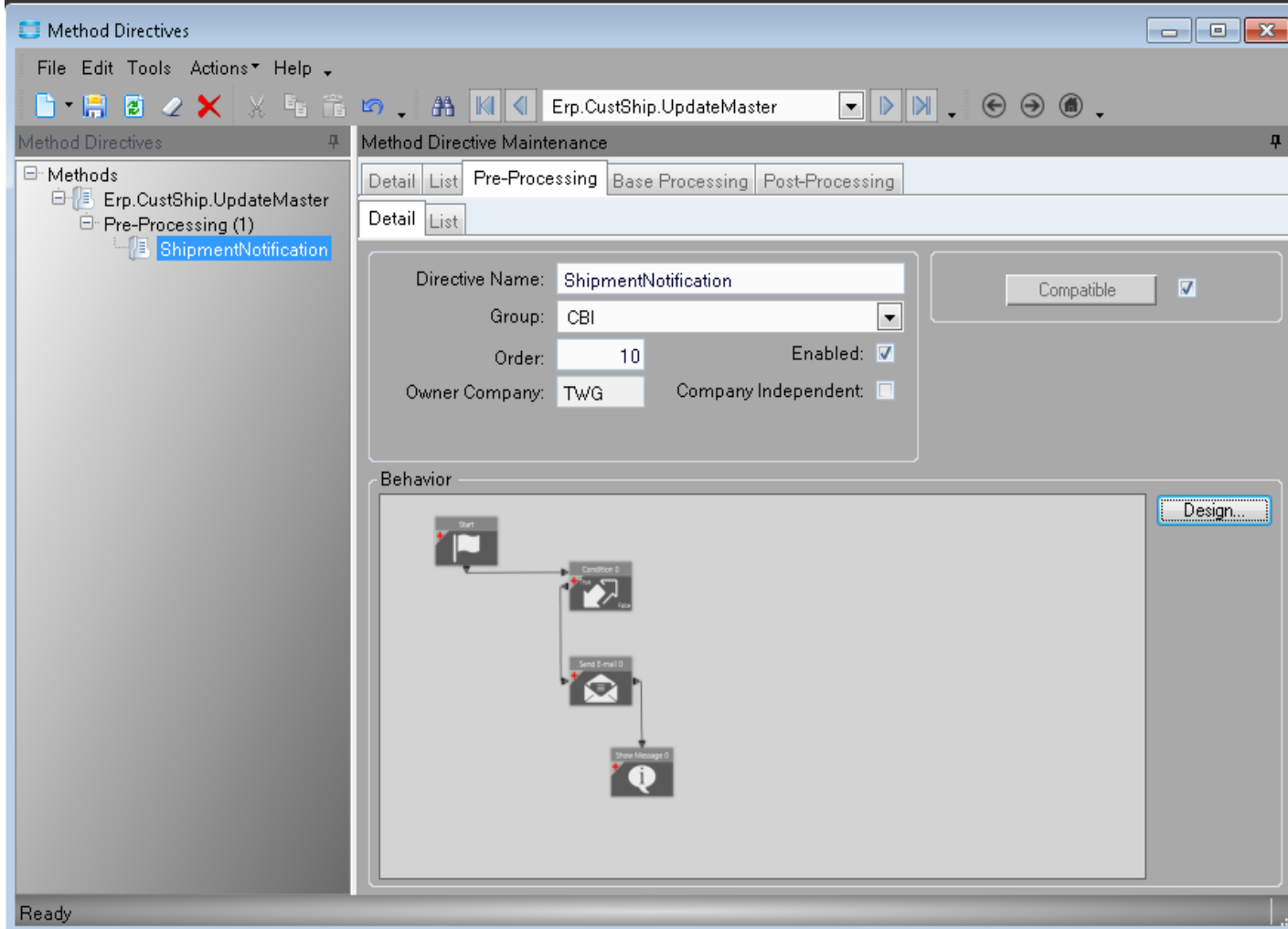
Below the configuration fields is a 'Company List' table:

Company List		
Company Name	Valid	Default
▶ Tulsa Winch Group	<input checked="" type="checkbox"/>	<input type="checkbox"/>

The status bar at the bottom left indicates 'Ready'.

Method Directives

1. Same as 8 and 9 except for:
 - I. Graphical Designer
 - II. No more retries



The screenshot displays the 'Method Directives' application window. The main area is titled 'Method Directive Maintenance' and shows the configuration for a directive named 'ShipmentNotification'. The configuration includes:

- Directive Name: ShipmentNotification
- Group: CBI
- Order: 10
- Owner Company: TWG
- Company Independent:
- Enabled:
- Compatible:

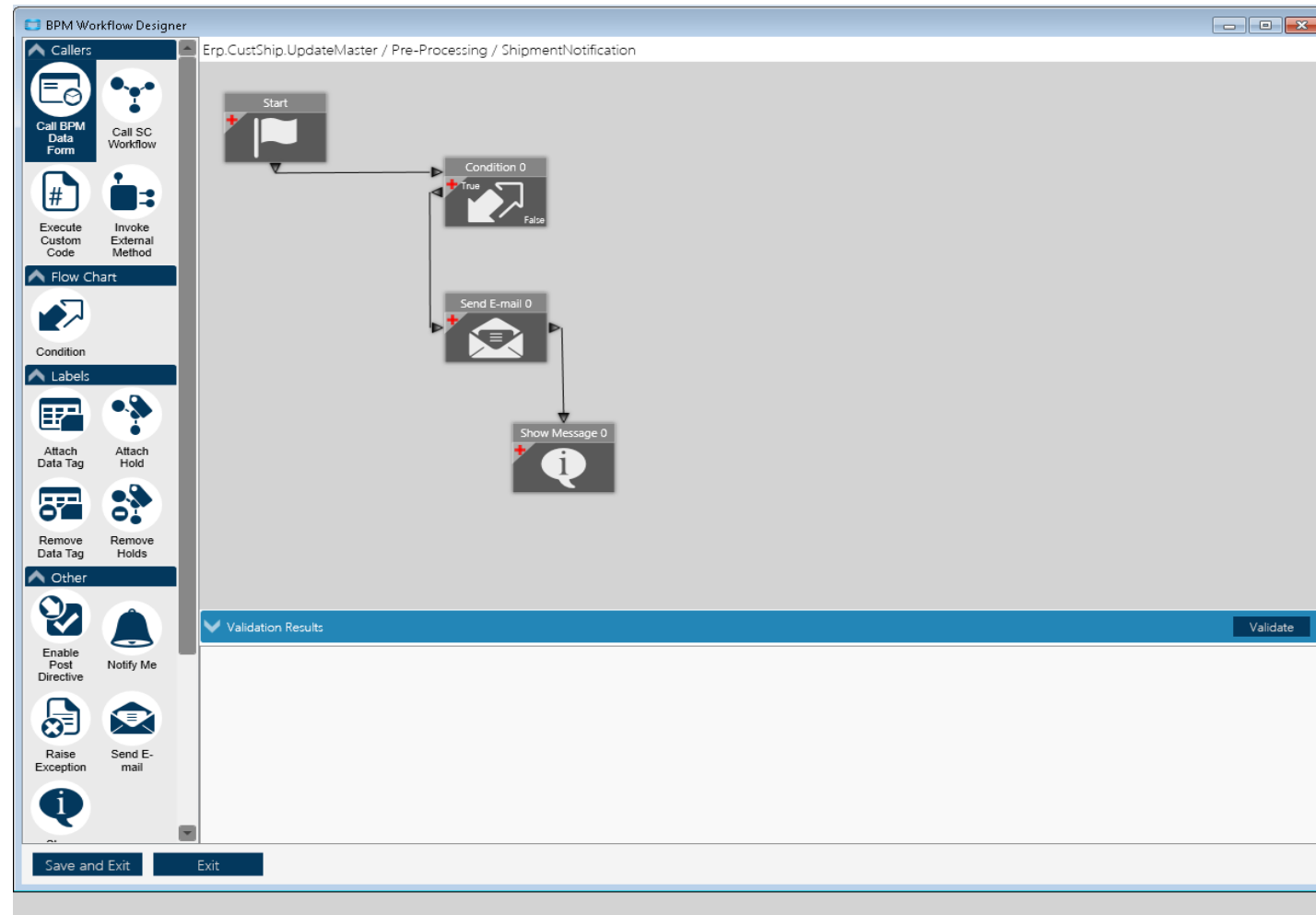
The 'Behavior' section shows a flowchart with the following steps:

- Start
- Condition 0
- Send Email 0
- Show Message 0

A 'Design...' button is visible in the bottom right corner of the Behavior section. The status bar at the bottom left indicates 'Ready'.

BPM Workflow Designer

1. Drag-N-Drop
2. Toolset Methods
3. Linking Objects
4. Validate doesn't work
5. Save & Exit
6. Exit



 Questions & Answers

Q & A



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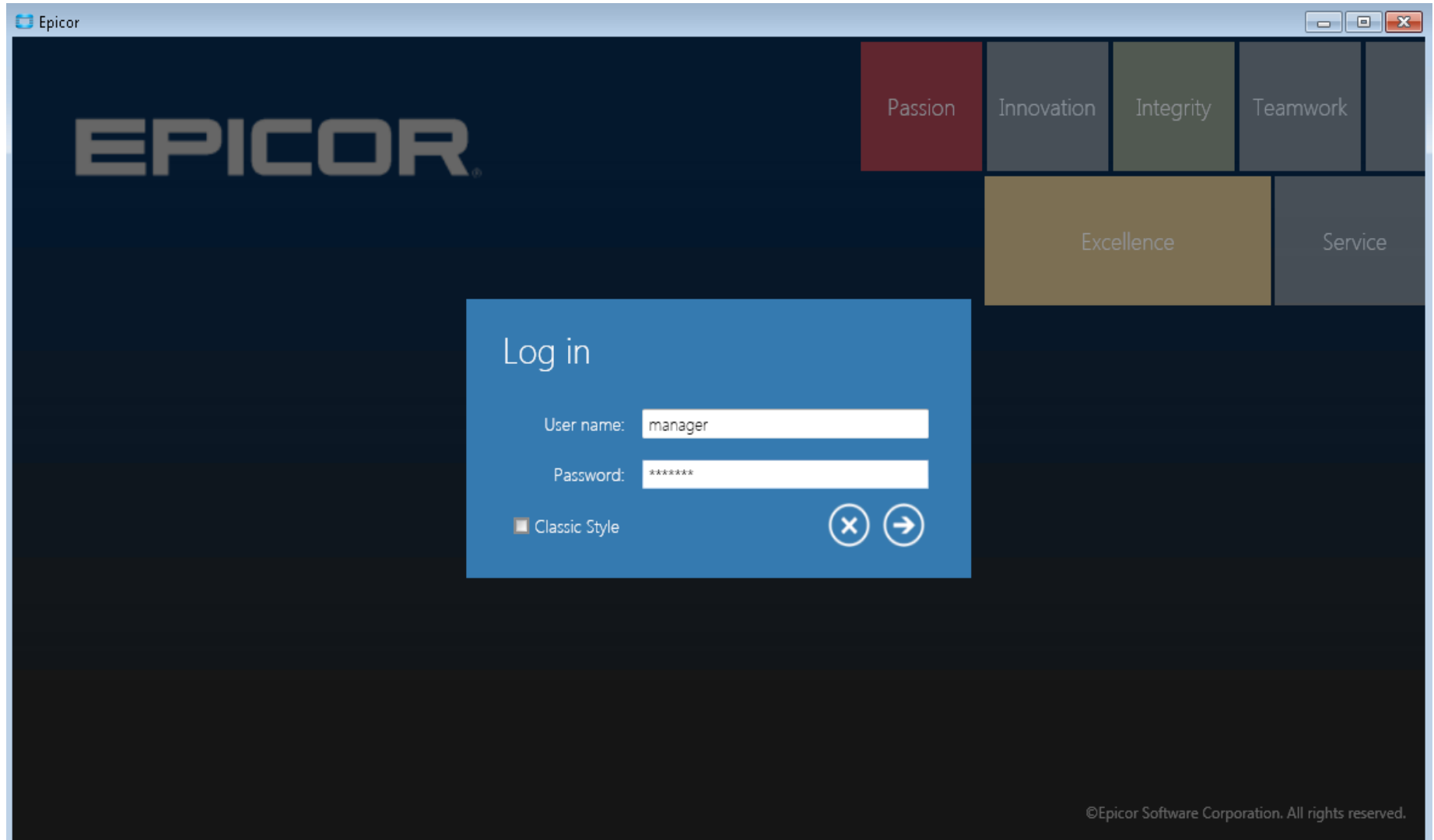
(630) 672-7688



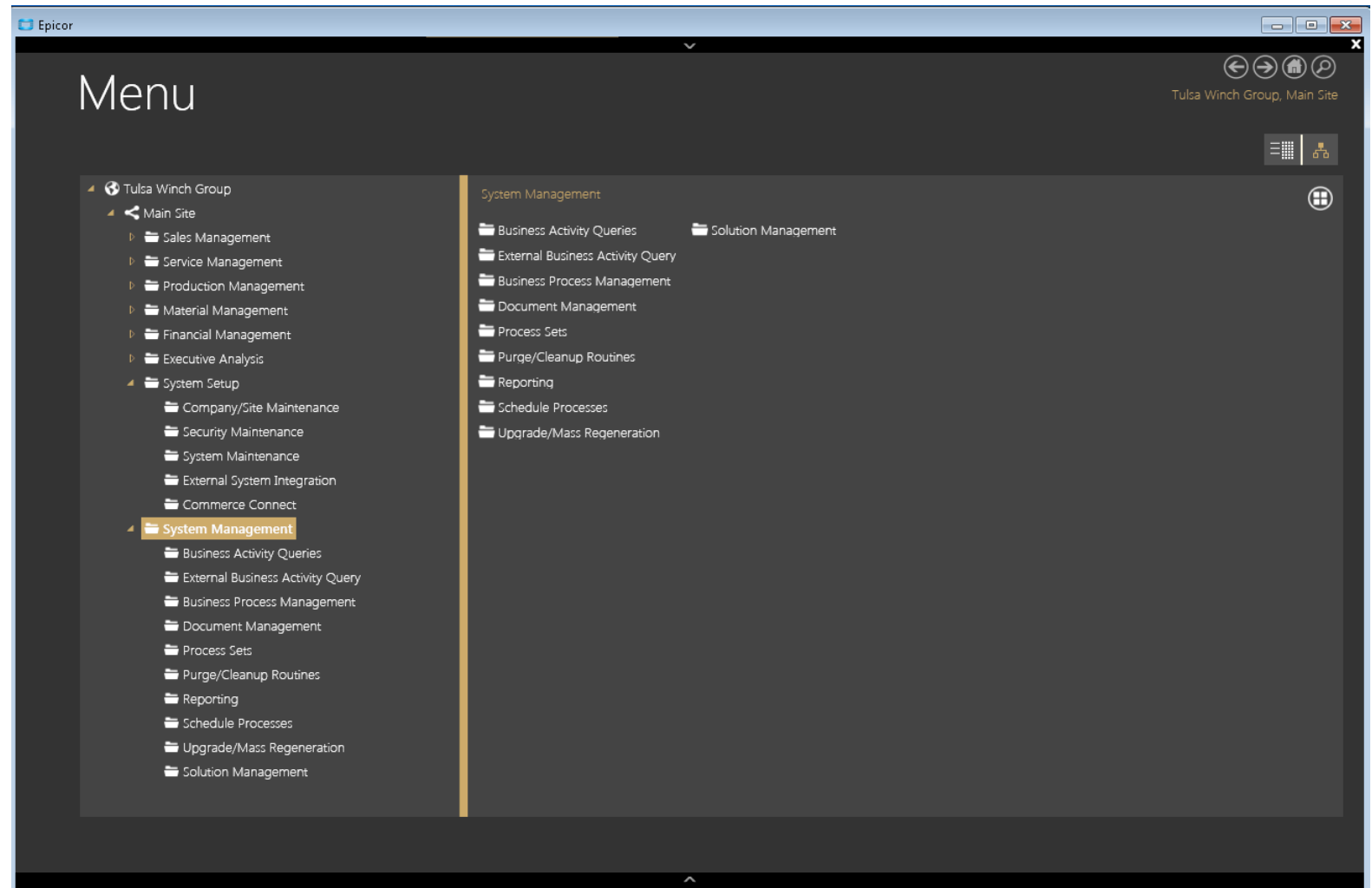
Epicor 10



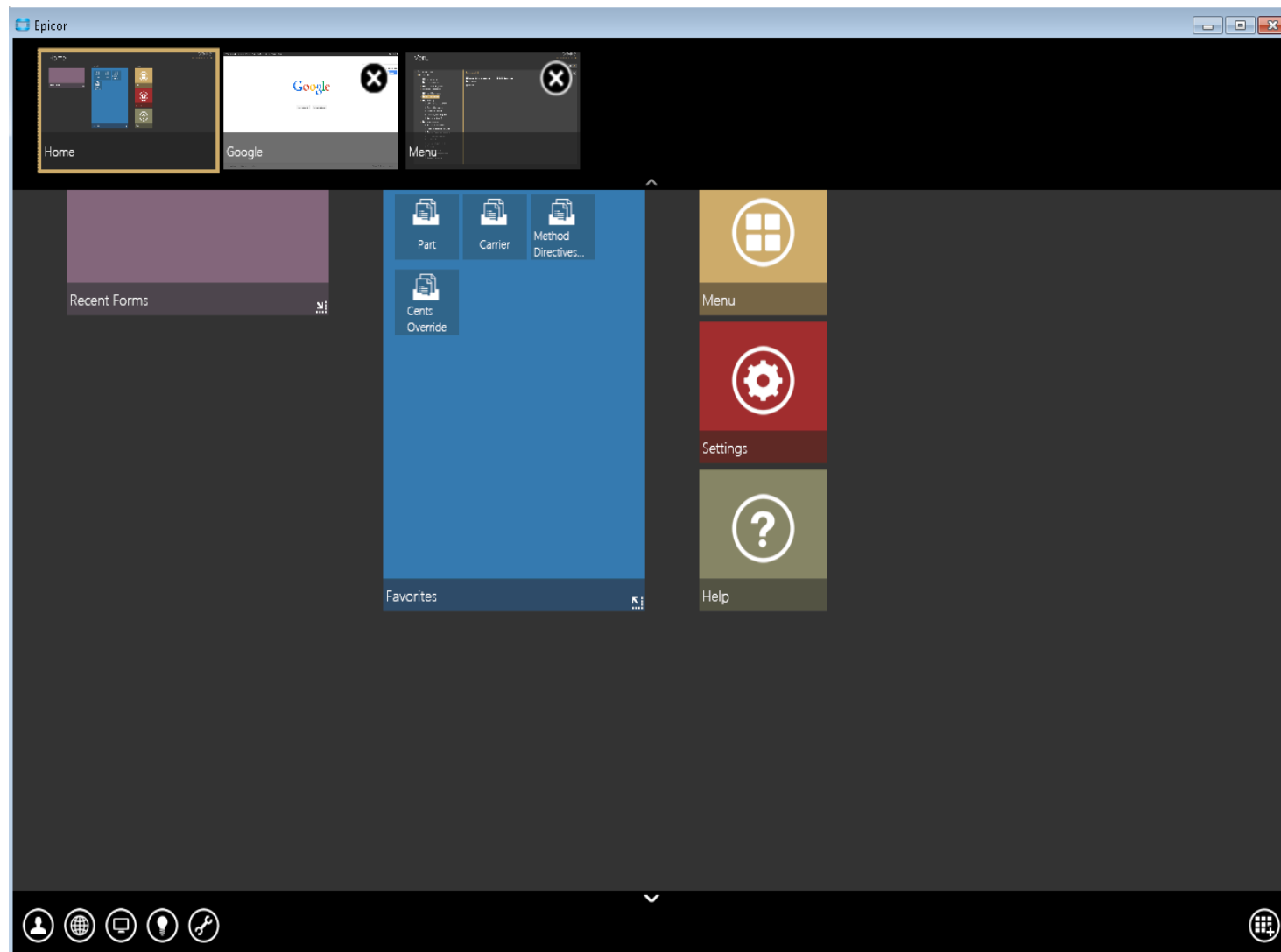
 Log In



Main Menu



- Navigation
- Personalization
- Customization
- User/Language
- Workstation



Demonstrations

- Sales Management
 - Quotes
 - **Orders**
- Production Management
 - **Jobs**
 - Engineering
 - Scheduling
 - Quality
 - MES / Data Collection
- Materials Management
 - Inventory
 - **Shipping / Receiving**
 - **Purchasing**
- Financial Management
 - Accounts Receivable
 - Accounts Payable
 - General Ledger
- System Setup
 - **Company/Site Maintenance**
 - Security Maintenance
 - System Maintenance
 - External System Integration
 - Commerce Connect
- System Management
 - Business Activity Queries
 - External BAQ
 - Business Process Management
 - Process Sets
 - Document Management
 - Purge & Cleanup Routines
 - **Reporting**
 - Schedule Processes
 - Upgrade / Mass Regeneration
 - Solution Management

Testimonials

From a programmer's view:

All ABL code will have to be translated to C#. A good programmer can re-do that in semi-quick fashion, you are not actually re-creating anything. I re-wrote ours in about 3 months. Granted I wrote them all originally, but still once I learned the syntax, I found C# to be much easier to work with. Things I couldn't figure out in ABL were almost too easy in C#. The biggest thing left to tackle is the configurator. The basic format came over, but the code behind the scenes does need to be re-written more so because of the new features. The E10 configurator tools are so much better I will actually be eliminating code. The BAQ & BPM tools are amazing. There is SO much more you can do now and it is easier.

Biggest issues we found were that E10 & C# are not so forgiving. It is much more strict, so if your original programming was "loose" it will call you on it.

It was a big project and we took full advantage of it. Epicor Support has been awesome, so for those that say wait until it settles, I would counter that with jump on it while it is the next big thing and you have their full attention. I believe your time/money would be better spent tackling one upgrade, instead of two, especially for those below E9.

 Questions & Answers

Q & A



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