



EXTENDED EDUCATION SESSIONS

These elite four-hour training sessions—developed by Epicor’s worldwide education team along with product management, development, support, and services—move beyond traditional labs and are conducted by Epicor’s education professionals. These half-day sessions enable in-depth, product-specific training with your own computer, small class size, and direct access to technical experts. Valued at over \$495.00, these are a special training opportunity at Perspectives and cost only \$250.00 for a fast conference ROI.

HERITAGE EDUCATION SESSIONS

These four-hour personal hands-on demo sessions are offered exclusively to Heritage iSolutions users. This is a great opportunity for Avanté, DataFlo, ManFact and Manage 2000 customers to “try before you buy” these recently introduced products. The \$125 fee covers machine rental and lab space. Epicor product experts will be conducting these sessions with the personal attention that you expect from our Sunday education offerings.

To register for these sessions, please visit www.regonline.com/perspectives2008

SUNDAY, OCTOBER 19 8:00AM – 12:00PM	
Heritage LAB: Half-day iSolutions Operational Data Store (ODS) for Epicor ETL and Cognos 8	The recently released Operational Data Store (ODS) for Epicor ETL contains data from your ERP system in Microsoft SQL Server. In this hands-on lab for our iSolutions Heritage products, we will explore ways to view the data, including creating OLAP cubes and ad-hoc reports.
PRODUCT LINE	Avanté, DataFlo, ManFact and Manage 2000
Extended Education: System Administration Course for Microsoft® SQL Server Users	Managing your system at peak performance? This session is dedicated to the system administrator who wants to know the fundamentals, and a bit more, about how to manage your Vantage/Vista system in the SQL Server environment on version 8.03.
OBJECTIVES At the end of this training, you should be able to:	<ul style="list-style-type: none"> Review system requirements. Become familiar with the database structure and the tasks associated with maintaining databases. Know how to optimize the system via appserver and database tuning. Become familiar with the Progress Explorer Tool and the DBMAN utility. Learn network management techniques and troubleshooting tips. Set up user access to ODBC and how to use it in the manufacturing software.

	<p>Fine tune workstations. Discuss backup methodology and options.</p>
AUDIENCE	System administrators
PREREQUISITES	Recommended Course: Navigation
PRODUCT LINES	Vantage and Vista
Extended Education: Advanced Customization Course	<p>This hands-on course provides students with an understanding of the application. The goal is to teach the primary functions and capabilities of the application in an organized format, combining instruction with workshops. It is structured to build upon information presented. A workshop following each course topic provides students with hands-on exercises based on the instruction.</p> <p>Advanced Customization techniques may include the use of progress programs (.p) placed on the server that provide customized modifications to the business logic of a particular form. While this is a different form of customization, it is beyond the scope of this course.</p>
OBJECTIVES At the end of this training, you should be able to:	<p>Identify the essential toolset involved in creating embedded customizations. Use the Customization Maintenance screen as a management tool for all customizations and personalizations. Call external business objects. This will include using the Object Explorer and Assembly Reference Manager. Create a simple routine using the Form Event Wizard and event handlers. Provide customized solutions in response to real world issues.</p>
AUDIENCE	System administrators Technical staff responsible for customizations
PREREQUISITES	Required Course Navigation Introduction to Customization Recommended Course: Database Concepts
PRODUCT LINES	Vantage and Vista
Extended Education: Business Process Management	<p>The Business Process Management course gives students the necessary skills for creating method directives that modify how business processes run. The Business Process Management (BPM) toolset modifies and extends business processes by intercepting tasks before they happen so users can validate, manipulate, and create workflows based on the data being passed through the application. The goal of this course is to give students the ability to set up, maintain, and run primary method directives.</p> <p>The course explores creating BPM hold types and attaching a hold to a specific record. The course then teaches the difference between method directive types and the various conditions and actions available for each method type. It concludes by providing students with hands-on training with various BPM scenarios.</p>
OBJECTIVES	<p>At the end of this training, you should be able to: Understand the functionality of business processes. Develop the ability to use both BPM holds and method directives.</p>

	<p>Understand the three kinds of method directives. Gain a working knowledge of available conditions and actions. Create beginning method directives. Possible workshop scenarios may include causing a specific field to be required, validating a field, and creating and using a hold type. Understand how to import, export, and update method directives.</p>
AUDIENCE	<p>System administrators Technical staff responsible for customizations</p>
PREREQUISITES	<p>Required Course: Navigation</p>
PRODUCT LINES	<p>Vantage and Vista</p>
Extended Education - Improving Productivity with Epicor Portal	<p>Epicor Portal introduces a truly collaborative environment by utilizing Microsoft® Windows® SharePoint® Services and Microsoft® Office SharePoint® Portal Server 2003. It incorporates real-time collaborative capabilities for multiple audiences with work spaces that combine documents, business data queries, announcements, tasks, and more.</p>
OBJECTIVES	<p>Become comfortable with the Data Explorer Workspace to create and organize views. Use the wizards to guide you through the process of creating a new business view. Edit a view, adding columns and additional formatting. Apply selection criteria to limit the information included in the view. Create view parameters to allow the user to designate values for a custom run. Understand user- or system-defined values used in selection criteria to control the information displayed based on a user's role. Incorporate view parameters to provide ""drill down"" capabilities. Export a business view to a dynamic format and a snapshot format. Use published views by importing and linking to SharePoint®.</p>
PREREQUISITES	<p>Knowledge of the software application file structure and an understanding of Microsoft® SharePoint® is helpful.</p>
AUDIENCE	<p>Power users System administrators</p>
PRODUCT LINES	<p>Enterprise, Epicor for Service Enterprises, iScala, Vantage and Vista</p>
Extended Education - Active Planner Basics	<p>This education experience is bound to be in demand, particularly as the annual budgeting cycle approaches. Join our education team for a four-hour exploration of Epicor Active Planner, our comprehensive tool for budgeting, planning, forecasting, and pro-forma reporting. This session covers the basics.</p>
OBJECTIVES	<p>At the end of this training, you should be able to: Create department expense plan sheets. Retrieve historical actuals. Upload budgets to the General Ledger. Create global formulas. Roll out and control your budgeting process through the use of templates. Know the power of creating additional dimensions for compensation planning and walk through using the Analyzer tool.</p>

AUDIENCE	Users who are new to Active Planner
PREREQUISITES	None
PRODUCT LINES	Enterprise, Epicor for Service Enterprises, Vantage and Vista
Extended Education: Service Connect	<p>This is a four-hour hands-on education event to learn the fundamentals of working with Epicor's premier business integration platform, Service Connect. This session is tailored to the unique needs of today's business with real-world scenarios and workflows that can be used to streamline business processes for shorter lead times.</p> <p>Service Connect is a one of a kind tool that utilizes the power of a Service Oriented Architecture (SOA) to connect with and automate processes within your Epicor solutions or integrate them with other 3rd party solutions.</p> <p>This session provides an understanding of the power of utilizing web services securely in day-to-day processing and also provides the developer with tips and tricks for creating your own business integration workflows.</p> <p>Whether your business is looking to streamline internal business processes within your Epicor solution or you are looking for new ways to interact with your business partners (customers or suppliers), this session will educate you on the "how."</p>
OBJECTIVES	<p>At the end of this training, you should be able to:</p> <ul style="list-style-type: none"> Set up the Service Connect environment. Integrate Service Connect with your Epicor solution. Create a workflow that automates business processing. Track and troubleshoot workflows. Learn tips and tricks, as well as best practices information.
AUDIENCE	System Administrators and Systems Integrators
PREREQUISITES	<p>Required Course: Navigation</p> <p>Recommended Course: Database Concepts</p>
PRODUCT LINES	Clientele, Enterprise, Epicor for Service Enterprises, iScala, Vantage and Vista
SUNDAY, OCTOBER 19 – 1:00PM – 5:00PM	
Heritage LAB: Half-Day Overview of Epicor Advanced Quality Management (AQM) for Avanté, DataFlo, ManFact, Manage 2000	All Epicor Heritage iSolutions products have integrations to Epicor Advanced Quality Management (AQM). In this lab, we will spend four hours inside the AQM application.
PRODUCT LINES	Avanté, DataFlo, ManFact and Manage 2000
Extended Education: Introduction to Dashboards Course	The dashboard is your personalized information and command center. Much like your car's dashboard gives you current information and controls to run the car, the dashboard can display current information and processes you need to more efficiently perform tasks. The data you choose to display is refreshed periodically, so you will be able to act on changes as they immediately occur. There are many standard dashboards included with the software; however, after taking this session, you will have the ability to create your own dashboards and modify existing dashboards.
OBJECTIVES	At the end of this training, you should be able to:

	<p>Understand a dashboard. Identify the authorization requirements to design dashboards. List key features of the dashboard. Add a query and modify the information that will appear. Display query results through a grid, chart, and tracker view. Modify query results in a grid and chart, apply rules and publish/subscribe. Add a process link and URL. Understand how to create your own tracker.</p>
RECOMMENDED AUDIENCE	New customers and/or existing customers preparing for an upgrade
PREREQUISITES	<p>Required Course: Navigation Computer and Internet navigation basics</p>
PRODUCT LINES	Vantage and Vista
Extended Education: Business Activity Query (BAQ) Report Designer and Crystal Reports Course	<p>Come to this four hour hands-on lab to learn how the Business Activity Query (BAQ) Report Designer is a useful tool for extracting and reporting data in version 8. This session will also include the fundamentals of using Crystal Reports as a delivery method for these reports. The BAQ Report Designer is a friendly tool that assists users in the generation of complex reports in Crystal Reports by providing intuitive BAQ data that can easily be picked up for faster and more efficient Crystal Reports. BAQ Report Designer is also a tool that allows users to create the user interface to generate a Crystal Report.</p>
OBJECTIVES	<p>At the end of this training, you should be able to: Identify BAQ examples and standard BAQ reports. Review the purpose of the BAQ Report Designer and how to create the report's user interface. Become comfortable with the steps involved to initially configure directory locations for reports. Become familiar with the design functionality available in the BAQ Report Designer. Gain knowledge of the menu features, what they do, and when to use them. Obtain an introduction to Crystal Reports. Understand the steps to transfer a BAQ Report into Crystal Reports. Deploy a BAQ Report to the network and display it on the Main Menu for others to access.</p>
AUDIENCE	<p>System administrators Anyone required to create and maintain reports in Vantage or Vista</p>
PREREQUISITES	<p>Required Course: Database Concepts A fundamental knowledge of relational database concepts such as table relationships, records, and field types. Understanding of the basic functionality of the current release of the business software application.</p>
PRODUCT LINES	Vantage and Vista
Extended Education: System Administration Course for Progress Users	<p>Managing your system at peak performance? This session is dedicated to the system administrator who wants to know the fundamentals, and a bit more, about how to manage their Vantage/Vista system in the Progress environment.</p>
OBJECTIVES	At the end of this training, you should be able to:

	<p>Review system requirements.</p> <p>Become familiar with the database structure and the tasks associated with maintaining databases.</p> <p>Know how to optimize the system via appserver and database tuning.</p> <p>Become familiar with the Progress Explorer Tool, PROMON, and the DBMAN utility.</p> <p>Learn network management techniques and troubleshooting tips.</p> <p>Set up user access to ODBC and how to use it in the manufacturing software.</p> <p>Fine tune workstations.</p> <p>Discuss backup methodology and options.</p>
AUDIENCE	System administrators
PREREQUISITES	Recommended Course: Navigation
PRODUCT LINES	Vantage and Vista
Extended Education - Improving Productivity with Epicor Information Worker and Service Connect	The Epicor Productivity Pyramid is a set of cross-product solutions that leverages the strength of a service-oriented architecture (SOA) to bring people, processes, and applications closer together. The components of the Productivity Pyramid (Epicor Portal, Service Connect, and Information Worker) work together in harmony to provide quick and intuitive access to key information and also to add business automation to your enterprise Epicor solution.
OBJECTIVES	<p>This session will demonstrate how to:</p> <p>Make enterprise data readily available using Epicor Portal by creating a Customer View.</p> <p>Manage key information using Epicor Information Worker by accessing information from an Epicor solution in Microsoft Outlook and synchronizing updates back to the main application.</p> <p>Use Epicor Service Connect with Epicor Portal to allow users to update or add new records from a portal view.</p>
AUDIENCE	System administrators Technical staff
PREREQUISITES	<p>Recommended industry knowledge:</p> <p>Basic understanding of the application's file structure.</p> <p>How to manage data in back office systems</p> <p>Experience with Web Services, XML, XSLT, and the SQL Server</p>
PRODUCT LINES	Clientele, Enterprise, Epicor for Service Enterprises, iScala, Vantage and Vista
Extended Education - Advanced Aspects of Epicor for Service Enterprises	Roll your sleeves up and get stuck into this Epicor for Service Enterprise advanced education session. During this hands on education experience, we will delve into deeper aspects of the suite including Integration with Outlook and Project, Configuring the Portal, Revenue Recognition, ETC Workbench, and reconciliation with Enterprise Financials.
OBJECTIVES	<p>At the end of this training, you should be able to:</p> <p>Understand the integration points between Epicor and Microsoft Project.</p> <p>Learn how to use various tools to manage Project Resources.</p> <p>Use the ETC Workbench to update planned hours.</p> <p>Understand the Revenue Recognition methods available within the application.</p>

	<p>Know the integration points between Epicor and Microsoft Outlook.</p> <p>Configure the SharePoint Portal to create a view to Epicor information.</p> <p>Understand the reconciliation tools provided to enhance reconciliation with Enterprise Financials.</p>
AUDIENCE	Advanced users of Epicor for Service Enterprises
PREREQUISITES	A solid understanding of Epicor for Service Enterprises project planner
PRODUCT LINES	Enterprise and Epicor for Service Enterprises
Extended Education: Productivity Pyramid	The Epicor Productivity Pyramid is a set of cross-product solutions that leverages the strength of a service-oriented architecture (SOA) to bring people, processes, and applications closer together. The components of the Productivity Pyramid (Epicor Portal, Service Connect, and Information Worker) work together in harmony to provide quick and intuitive access to key information and also to add business automation to your enterprise Epicor solution.
OBJECTIVES	<p>This session will demonstrate how to:</p> <p>Make your Epicor data readily available using Epicor Portal by creating a Customer View.</p> <p>Manage key information using Epicor Information Worker by accessing information from an Epicor solution in Microsoft Outlook and synchronizing updates back to the main application.</p> <p>Use Epicor Service Connect with Epicor Portal to allow users to update or add new records from a portal view.</p>
AUDIENCE	System administrators Technical staff
PREREQUISITES	<p>Recommended industry knowledge:</p> <p>Basic understanding of the application's file structure</p> <p>How to manage data in back office systems</p> <p>Experience with Web Services, XML, XSLT, and the SQL Server</p>
PRODUCT LINES	Clientele, Enterprise, Epicor for Service Enterprises, iScala, ITSM, Vantage and Vista