Extended Education Courses
Extended Education Sessions

Extended Education Sessions are elite, four-hour training sessions developed by Epicor’s worldwide education team, along with product management, development, support, and services. They move beyond traditional labs and are conducted by Epicor’s education professionals. These half-day sessions, offered both Saturday and Sunday, enable in-depth, product-specific training with your own computer, small class size, and direct access to technical experts. Valued at over $500.00 USD, these are a special training opportunity at Insights and cost only $250.00 USD for a fast conference ROI. Please reserve a space in your desired courses during the Insights registration process.

Most of the Extended Education sessions are designated for CPE Credit, as noted in this document. See below for additional details.

CPE Credits

Epicor Software Corporation is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org
### Extended Education - CRM - System Set-up, Opportunities, Tasks, and Marketing Tools

How do you identify and target your most profitable customers, manage marketing campaigns, and generate leads for your sales team? Learn to optimize the information you keep on your customers using the Prophet 21 customer relationship management functionality. The CRM module can help you cultivate individual relationships with your customers, providing them with the highest level of service and improving their satisfaction while maximizing your profits. This extended education course offers soup to nuts instruction on Prophet 21’s embedded customer relationship management functionality.

**OBJECTIVES:** Learn to implement key CRM features in your business, exploring set up procedures and processes for entering opportunities and tasks.  
**AUDIENCE:** System Administrators, Sales Professionals, Marketing Professionals  
**PREREQUISITES:** None.  
**APPLICABLE PRODUCTS:** Prophet 21  
**PROGRAM LEVEL:** Intermediate.  
**FIELD OF STUDY:** Computer Science.  
**CPE CREDITS:** 4.0  
**COST:** There is an additional $250 fee to attend this session.

### Extended Education: Basic Report Writing

An essential aspect of communication in any successful organization is concise, meaningful report writing. In this 4-hour hands-on session, you will learn how to create simple reports using the ENTITY and PRODUCT files using report writer. This is a great class for those just getting started with Eclipse Report Writer or those looking to freshen up on the basics.  

**OBJECTIVES:** Learn how to build a report, Understand the Column Data screen, Learn how to select and sort, Learn how to Sample and Run the report.  
**AUDIENCE:** System administrator or person responsible for creating custom reports within the organization.  
**PREREQUISITES:** Attendees should have a basic understanding of Files and Dictionaries in Eclipse.  
**APPLICABLE PRODUCTS:** This session will be of benefit to customers running Eclipse.  
**PROGRAM LEVEL:** Basic.  
**FIELD OF STUDY:** Computer Science.  
**CPE CREDITS:** 4.0  
**COST:** There is an additional $250 fee to attend this session.
Extended Education: Crystal Reports, Part 1

This extended session introduces creating custom reports for Epicor using Crystal Reports XI R2. It discusses data connectivity and demonstrates using a Business Activity Query (BAQ) to populate a new report. During the report creation, several design tools, such as grouping, subtotals, and basic parameters will be used. Deployment options will also be discussed. It is recommended the Crystal 1 and Crystal 2 sessions be taken together to ensure skills continuity. **OBJECTIVES:** Upon successful completion of this session, you will be able to: - Name the Main menu components in Crystal Reports. - Discuss data source connectivity. - Explore ways to identify tables and field names. - Identify different join types. - Use Custom Design tools to design reports. - Work with up subtotals and grand totals. - Use the Formula Editor to create calculated fields. - Introduce Crystal Report parameters. **AUDIENCE:** This session appeals to the following audience: System Administrators, Business Analysts, Accounts Payable/Receivable Clerks. **PREREQUISITES:** Required Courses: None. Recommended to have a good understanding of the database structure. **APPLICABLE PRODUCTS:** This session will be of benefit to customers running any of Epicor 9.x, Epicor Enterprise, Epicor Vantage 8.x, Epicor Vista 8.x, and planning an upgrade to Epicor 9.x. **PROGRAM LEVEL:** Basic **FIELD OF STUDY:** Computer Science **CPE CREDITS:** 4.0 **COST:** There is an additional cost of $250 to attend this session.

Extended Education: Dive Deep into Epicor ERP Posting Rules, Part 1

In this extended education experience, familiarize yourself with the flexibility and freedom of Epicor’s posting process; a unified, multi-stage process that collects business transaction data and sends transactions to the General Ledger (GL) via user-defined posting rules. Although modifications of the posting rules that install with Epicor ERP are optional, after taking this session you will be able to decide for yourself if your company should take advantage of certain financial capabilities the application offers. Explore several GL transaction types and observe as we intricately break down the structure of their posting revision and rule algorithms and learn to troubleshoot transactions using the Review Journal and the Posting Engine Log. **OBJECTIVES:** Upon successful completion of this session, you will be able to: - Manage a flexible, rule-based posting mechanism. - Differentiate between standard and extended posting rules. - Understand the anatomy of a GL transaction type. - Identify the automated handling of multiple books, currency conversions, and rounding differences. - Troubleshoot transactions using the Review Journal and the Posting Engine Log. **AUDIENCE:** This session will appeal to the following audience: Experienced Epicor ERP users (Financial Modules) looking to change their current financial structure - Project managers - Controllers. **PREREQUISITES:** Required Courses Navigation, General Ledger, Accounts Receivable. **APPLICABLE PRODUCTS:** This session will benefit customers running Epicor 9.x. **PROGRAM LEVEL:** Intermediate. **FIELD OF STUDY:** Accounting. **CPE CREDITS:** 4.0 **COST:** There is an additional $250 fee to attend this session.
Extended Education: Effective Presentation Skills

When called upon to deliver a presentation, people often are faced with the difficult task of preparing and delivering effective presentations. Effective presentation skills do pay off for individuals and organizations. Every presentation you make is an opportunity to promote your organization, products, services, and yourself. Business today is fast-paced and competitive. Good communication skills are essential. This extended session focuses on the presentation process, use of visual aids, feedback, and interaction. The session is organized into two sections. The first focuses on the presentation process, including several short activities to warm you up for the second section, which is devoted to individual presentations and valuable feedback. **OBJECTIVES:**

- Prepare and deliver effective presentations.
- Use compelling openings, closings, and additional elements.
- Identify ways of adding variety.
- Design and use visuals competently.
- Use effective questioning techniques to encourage participation.

**AUDIENCE:** Project Team Leads, ERP/Distribution Implementation Manager/Leads, IT, Trainers, Training Managers

**Prerequisites:** None.  
**PRODUCT LINES:** All  
**FIELD OF STUDY:** Computer Science  
**CPE Credits:** 4  
**Cost:** There is an additional cost of $250 to attend this session.

Extended Education: Intermediate Customization Techniques for Vantage, Vista & Epicor 9

Epicor Applications are based on powerful business architecture that provides a robust and intuitive user interface by default. Epicor tools such as Customization Wizards, Business Process Management (BPM), Service Connect, and the ability to modify code using the Script Editor are available to meet more specific user interface requirements based on the business needs of your company. This extended education experience goes beyond simple sheet and field modification to utilize advanced customization techniques to provide a solution to a specific business user interface requirement. This session provides examples of how to create form modifications combining the power of Customization Wizards, BPM, and other tools to respond to a specific business scenario. **OBJECTIVES:**

Upon successful completion of this session, you will be able to:

- Use the Business Logic Assembly Reference to call out required assemblies.
- Use the Business Logic Method Call wizard to automatically generate a call to any public method on an adapter and map an input parameter.
- Create a user interface customization using multiple customization tools in response to a business scenario.

**AUDIENCE:** This session will appeal to the following audience: IT/Technical Staff, System administrators

**PREREQUISITES:** Required Courses: Navigation, Introduction to Embedded Customization or Perspectives Personalization and Modification Recommended course knowledge Database Concepts.

**APPLICABLE PRODUCTS:** This session will be of benefit to customers running and Epicor Vantage 8.x, Epicor Vista 8.x, and Epicor 9.x. Differences between versions will be pointed out. **PROGRAM LEVEL:** Intermediate

**FIELD OF STUDY:** Computer Science  
**CPE CREDITS:** 4.0  
**COST:** There is an additional cost of $250 to attend this session.
Extended Education: Introduction to Epicor Dashboards in Vantage, Vista & Epicor 9.x

In this extended education experience you will discover how Epicor dashboards are your personalized, role-based information command center. Much like your car’s dashboard gives you current information and controls to run the car, Epicor dashboards 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 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: Upon successful completion of this session, you will be able to:- Understand the general purpose and functionality of dashboards.- Identify the authorization requirements to design and modify dashboards.- List the key features of dashboards.- Add queries and modify the information displayed on dashboards.- Display query results through grid, chart, and tracker views.- Modify query results in grid and chart views, apply rules to data, and use the publish and subscribe functionality.- Add a process link and URL to a dashboard.- Create a customized tracker.- Export and import dashboard definitions.- Use dashboards.- Build and deploy dashboards to the Main menu and to the Favorites bar. AUDIENCE: This session will appeal to the following audience:- New customers and/or existing customers preparing for an upgrade- Executives- Line managers- Project managers- Business analysts- System administrators PREREQUISITES: Required courses: Navigation-Recommended computer and Internet navigation basics APPLICABLE PRODUCTS: This session will be of benefit to customers running any of Vantage, Vista or Epicor 9.x. PROGRAM LEVEL: Basic FIELD OF STUDY: Computer Science CPE CREDITS: 4.0 COST: There is an additional $250 fee to attend this session.

Extended Education: Order Fulfillment – Streamlining Your Distribution Processes

The Fulfillment Workbench reserves or allocates material to Sales Orders, Job Orders, or Transfer Orders. Learn how to use this functionality to satisfy demand material quantities through jobs or stock in a sequence that matches allocation priorities assigned to your customers. OBJECTIVES: Upon successful completion of this session, you will be able to:- Browse open sales orders based on a series of comprehensive user-specified search criteria.- Reserve material quantities for selected sales orders.- Allocate inventory to sales orders using pre-defined allocation templates or using manually entered ad-hoc allocation parameters.- Automatically generate cross-docked transactions.- Release selected, allocated orders to the Material Queue for order-based picking in the warehouse. AUDIENCE: This session will appeal to the following audience: Cost Accountants AP/AR Clerks, Shop Floor Employees, Order Entry Staff, Sales Manager, IT/Technical Staff, System Administrators PREREQUISITES: Required Course: Navigation, Order Management and Inventory Management APPLICABLE PRODUCTS: This session will be of benefit to customer running Epicor 9.05. PROGRAM LEVEL: Intermediate FIELD OF STUDY: Production CPE CREDITS: 4.0 COST: There is an additional $250 fee to attend this session.
### Extended Education: Scheduling with Epicor ERP

This extended session introduces the theory of scheduling and the use of the scheduling tools in the Epicor application. The objective is to provide a foundation using the application to achieve realistic production schedules and load estimates that can be used to help control the shop floor and aid in delivery promises. The Scheduling Course focuses on creating job schedules, computing resource loads, and communicating this information to stakeholders. **OBJECTIVES:** Upon successful completion of this session, you will be able to: -Understand scheduling in a manufacturing environment. -Apply scheduling features available in the Epicor application. -Understand scheduling options. -Use the application to help create realistic production schedules and load estimates. **AUDIENCE:** This session will appeal to the following audiences: Production Controller, Material Planner, Operations Manager, Scheduler, Engineers. **PREREQUISITES:** Required courses: Navigation Recommended knowledge of computer and internet navigation basics. **APPLICABLE PRODUCTS:** This session will be of benefit to customers running any of Vantage, Vista or Epicor 9.x. **PROGRAM LEVEL:** Basic. **FIELD OF STUDY:** Production. **CPE CREDITS:** 4.0. **COST:** There is an additional f $250 fee to attend this session.

### Extended Education: Tactics to Improve Inventory Turns and Service Level with Neil VanWalbeck

Epicor understands the critical role inventory management plays in the success of your business. As a result, we're dedicating an extended session on proper inventory management techniques. **OBJECTIVES:** In this special four hour session led by Epicor’s Neil VanWalbeck, you'll learn the basics of inventory management goals, the purchase methods available in Prophet 21 to help achieve those goals, and how to measure and increase turns. You’ll be sure to learn how proactive inventory management practices make a measurable difference in your operations and customer service levels. **AUDIENCE:** Inventory and Purchasing Managers. **PREREQUISITES:** None. **PROGRAM LEVEL:** Intermediate. **FIELD OF STUDY:** Computer Science. **CPE CREDITS:** 4.0. **COST:** There is an additional $250 fee to attend this session.
Extended Education: The Accidental DBA

Are you an accidental DBA? Whether your database is SQL or Progress, you will find this session helpful, designed for the beginner or the professional. We will review what you need to do to be a pro with database maintenance and care. **OBJECTIVES:** Upon successful completion of this session, you will be able to:-Maintain daily, monthly, and yearly backups. -Maintain service packs. -Test disaster recovery. -Understand general dos and don'ts. **AUDIENCE:** This session will appeal to the following audience: IT/Technical Staff, System administrators **PREREQUISITES:** Required Course: None **APPLICABLE PRODUCTS:** This session will be of benefit to customers running any Epicor-Vantage, Epicor Vista, Epicor ERP version. **PROGRAM LEVEL:** Basic **FIELD OF STUDY:** Computer Science **CPE CREDITS:** 4.0 **COST:** There is an additional $250 fee to attend this session.
Extended Education: Purchasing in Prophet 21, including how to use the new VSM window to better manage your relationships with your suppliers.

Technology has made it possible for distributors to purchase material more efficiently and cheaply. With all of the tools and functionality available, how can you be sure that you are using best practices in your daily purchasing procedures? Attend this extended education session to learn how to take advantage of Prophet 21’s powerful purchasing functionality to manage your procurement needs, including the new Vendor Supplier Management window which allows you to keep closer tabs on your relationship with your vendors and suppliers. **OBJECTIVES:** Provide a solid understanding of the purchasing capabilities and best practices within Prophet 21. **AUDIENCE:** Purchasing and Inventory managers. **PREREQUISITES:** None. **APPLICABLE PRODUCTS:** Prophet 21 **PROGRAM LEVEL:** Intermediate. **FIELD OF STUDY:** Computer Science. **CPE CREDITS:** 4.0 **COST:** There is an additional $250 fee to attend this session.

Extended Education: Customizing Prophet 21 using DynaChange and Extensibility Tools

Allowing users to be more efficient has never been easier! Using the DynaChange Designer and the new tools offered in the DynaChange Extensibility Series, you have the ability to customize your application to meet the unique business needs of each of your users. After learning about each feature, you’ll have the ability to practice on your own as each user will have his/her own PC in this session. Register early to secure a spot in this limited seating session! **OBJECTIVES:** In this hands-on session, we’ll dig into the details of using field chooser, user defined fields, and screen design using DynaChange Designer, building workspaces with DynaChange Portals, and adding new business logic with DynaChange Rules. We’ll also introduce the brand new DynaChange Navigator which allows you to build user defined navigation and drill throughout Prophet 21. **AUDIENCE:** System Administrators. **PREREQUISITES:** None. **PROGRAM LEVEL:** Intermediate. **FIELD OF STUDY:** Computer Science. **CPE CREDITS:** 4.0 **COST:** There is an additional $250 fee to attend this session.
Extended Education: How to Read Financial Reports for Managers and Non-Accounting Personnel

Do you need to have a better understand of your company’s financial statements? Do you have concerns about the meaning of some of the items on the financial reports? Do you want to feel confident when looking at financial data? If you have answered yes, this session is for you. Financial statements seem to be written in a foreign language that only accountants can understand. This course will help break through that language barrier. Attend this session to help get a grip on profit, cash flow, and the financial condition of the business. **OBJECTIVES:** Understand the purpose of a balance sheet, income statement, and cash flow statement. - Understand terminology related to financial statements. - Interpret financial statements to assess a company’s financial situation. - Analyze statements to measure performance.

**AUDIENCE:** Non-accounting personnel and managers  
**PREREQUISITES:** General distribution knowledge  
**APPLICABLE PRODUCTS:** Prophet 21  
**PROGRAM LEVEL:** Intermediate  
**FIELD OF STUDY:** Computer Science.  
**CPE CREDITS:** 4.0  
**COST:** There is an additional $250 fee to attend this session.

Extended Education: BAQs for Faster Access to Information

This session introduces the Business Activity Query (BAQ) Designer data extraction tool. It discusses data location concepts and provides an overview of query building techniques using the Phrase Builder, the Criteria Wizard, and the Calculated Field Wizard. This course provides techniques for creating static business activity queries (BAQs) as well as updatable BAQs. Both queries can be used as the foundation for reports and dashboards, or to review specific details of your day-to-day business. An updatable BAQ provides a powerful mechanism to share and update data details when used as the foundation of a dashboard. It creates a powerful tool for team collaboration displayed on the standard Epicor application or modified for display on a mobile device such as an iPhone®. **OBJECTIVES:** Upon successful completion of this session, you will be able to:-Use the field level technical help or the data dictionary viewer to locate the table and field criteria for use in a BAQ. -Create a BAQ using the Phrase Builder and its query-building views. -Use the Criteria Wizard to filter the data returned by the BAQ without editing the 4GL code used in the query. -Add calculated and aggregated values to a query using the Calculated Field Wizard. -Design an updatable BAQ to increase team collaboration. -Import or export queries between companies, or to a .xml or ASCII file type.  

**AUDIENCE:** This session will appeal to the following audience: CFO/Controller, COO/Operations Manager, Production Manager, Account Manager, Sales Representative, System Administrator, IT/Technical Staff  
**PREREQUISITES:** Required Courses: Navigation. Recommended to have knowledge of the database structure.  
**APPLICABLE PRODUCTS:** This session will be of benefit to customers running Epicor ERP.  
**PROGRAM LEVEL:** Intermediate  
**FIELD OF STUDY:** Computer Science.

**CPE CREDITS:** 4.0  
**COST:** There is an additional $250 fee to attend this session.

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Epicor Insights 2012 Extended Education Courses
Extended Education: Crystal Reports, Part 2

As a continuation to Crystal Part 1, this session provides more report writing skills including Running Totals, conditional highlighting and discussions on how Crystal interprets data. This extended session explores modifying system forms and reports and will introduce how to use the powerful Crystal Report sub report features. It is recommended that Crystal 1 and Crystal 2 be taken together to ensure continuity of the concepts. **OBJECTIVES:** Upon successful completion of this session, you will be able to: - Perform Conditional Highlighting in a report. - Duplicate and modify an existing report definition. - Comprehend sub reports and how to use them to your advantage. **AUDIENCE:** This session will appeals to the following audience: System Administrators, Business Analysts, Production Managers. **PREREQUISITES:** Required Courses: None Recommended to have a good understanding of the database structure. **APPLICABLE PRODUCTS:** This session will be of benefit to customers running and Epicor 9.x, Epicor Enterprise, Epicor Vantage 8.x, Epicor Vista 8.x, and planning an upgrade to Epicor 9.x. **PROGRAM LEVEL:** Intermediate. **FIELD OF STUDY:** Computer Science. **CPE CREDENTIALS:** 4.0. **COST:** There is an additional $250 fee to attend this session.

Extended Education: Customization to the MAX for Epicor ERP Developers

This extended education session is ideal for advanced developers, IT professionals, and custom programmers. Learn about the tools that Epicor internal developers use to turn Epicor ERP into a leading edge, totally customizable product. Gather deeper understanding of the user interface architecture, learn how to customize user-defined (UD) tables, and gain knowledge about launching custom forms. You will also discover how to tap into specific events that trigger when users make a change on a form or activate a custom button or field element. You will also find out how to develop custom code through the Script Editor. **OBJECTIVES:** Upon completion of this session you will: - Understand the UI architecture, specifically the user interface terminology, common business objects, and extended properties. - Gain a better understanding of general .NET events and specific Epicor ERP events. - Leverage typical customizations such as context menus, custom toolbars, integrations, and other customizable items. - Use the BLTester, Resource Editor, TextPad, and .NET Reflector developer tools. **AUDIENCE:** This session will appeal to the following audience: Advanced developers, IT professionals, Custom programmers. **PREREQUISITES:** Basic customization knowledge. **APPLICABLE PRODUCTS:** This session will be of benefit to customers running Epicor 9.x. **PROGRAM LEVEL:** Intermediate. **FIELD OF STUDY:** Computer Science. **CPE CREDENTIALS:** 4.0. **COST:** There is an additional $250 fee to attend this session.
Extended Education: Deliver more with Epicor using XSOL InOrder

From enabling smoother system implementations to helping an organization become Lean, XSOL Enterprise Process Planning (XSOL InOrder) helps you leverage your investment in Epicor. XSOL’s InOrder software can help add value to your Epicor software by:

- Making day-to-day operations easier and reducing the risk from change.
- Benchmarking your operations against Epicor’s Best Practice processes.
- Providing a platform to implement Lean improvements to the business. This session will show how XSOL InOrder provides a structured way to communicate business processes; then how it can be used to capture, refine and align your organization’s tribal knowledge with your business strategy. It will demonstrate how XSOL overcomes the documentation ‘change barrier’. You will see how to benchmark your organization against Epicor’s Best Practice processes and how XSOL’s visual techniques enables staff to see flaws in your processes and how they can be improved. Finally, you will learn the principles of how to make your business operations Lean using XSOL InOrder.

**OBJECTIVES:** Upon successful completion of this session, you will be able to understand:

- Basic principles of XSOL’s Enterprise Process Planning and Lean business practices.
- How to derive benefits from aligning your processes with Epicor’s Best Practices.
- Using process visualization to enable employees to identify process improvements.
- How to use EPP to ensure successful Epicor system implementations and upgrades.
- Using the Lean Business features of XSOL to implement continuous improvement.
- How to create professional documentation for certification (e.g., ISO), staff training and operational instructions and impressing clients.

**AUDIENCE:** This session will appeal to the following audience:

- New customers and/or existing customers preparing for an upgrade.
- Executives, Consulting Managers, Project Managers, Business Analysts

**PREREQUISITES:** None

**APPLICABLE PRODUCTS:** This session will be of benefit to customers running any Epicor systems in all industries.

**PROGRAM LEVEL:** Intermediate

**FIELD OF STUDY:** Computer Science

**CPE CREDITS:** 4.0

**COST:** There is an additional $250 fee to attend this session.
Extended Education: Dive Deep into Epicor ERP Posting Rules, Part 2

In part 2 of this 2-part extended education experience, dive even deeper into the posting rules as we extend business transaction document functionality with BAQs, add posting codes, posting entities and user-defined functions, build new rule operations, post to dynamic segments, and use Lookup tables to map source values to target values when posting. After taking this session you will be able to decide for yourself if your company should take advantage of the extended financial capabilities the application offers. **OBJECTIVES:** Upon successful completion of this session, you will be able to: - Manage a flexible, rule-based posting mechanism. - Further understand the anatomy of a GL transaction type revision. - Demonstrate how user-defined business entities drive posting rules. - Use a BAQ to add new posting codes. - Post to dynamic segments. **AUDIENCE:** This session will appeal to the following audience: - Experienced Epicor ERP users (Financial Modules) looking to change their current financial structure - Project managers - Controllers

**PREREQUISITES:** Required courses: Navigation, General Ledger, Accounts Receivable, Advanced General Ledger or Part 1 of this 2-Part extended session. **APPLICABLE PRODUCTS:** This course will benefit customers running Epicor 9.x. **PROGRAM LEVEL:** Intermediate **FIELD OF STUDY:** Accounting **CPE CREDITS:** 4.0 **COST:** There is an additional $250 fee to attend this session.

Extended Education: Epicor DMT Successful Data Migration Strategies

Explore the best tool to migrate from your current system to the latest Epicor ERP platform. Walk through various scenarios and review tried and tested methodologies to help utilize the full benefits of Epicor ERP and maintain your most valuable assets your data. **OBJECTIVES:** Upon successful completion of this session, you will be able to:- Understand Epicor DMT. - Understand the methodology to migrate to Epicor 9.05. **AUDIENCE:** This session will appeal to the following audience: - Users responsible for configuring and migrating data to Epicor 9.05. - New Epicor users. - Existing users looking for an alternative migration path **PREREQUISITES:** Required Courses: None. Recommended knowledge of database administration, processes and concepts. **APPLICABLE PRODUCTS:** This session will be of benefit to customers running Vista, Vantage or Epicor 9.x. **PROGRAM LEVEL:** Intermediate **FIELD OF STUDY:** Computer Science. **CPE CREDITS:** 4.0 **COST:** There is an additional $250 fee to attend this session.
Extended Education: Epicor Enterprise Performance Canvas with EPM Server & Cube Connect

Epicor EPM Server offers a comprehensive Business Insight platform in support of better more accurate business decision making. Its pre-configured approach lets business users create and deploy key performance indicators (KPI) and scorecards based on the information that matters most to them. EPM Server is a Microsoft Windows service, which manages communication with SQL Server Analysis Services and ensures that your ERP data is summarized and delivered in an analytical format (OLAP cubes). An important facet of EPM Server is Epicor Cube Connect, which is used to create, manage and deploy the information you need from Epicor EPM where and when you need it. This extended education experience introduces the components of Epicor EPM Server and provides a basic understanding of OLAP and the data flow that populates EPM cubes. Hands-on examples teach basic modification and deployment of a user cube using Epicor Cube Connect. OBJECTIVES: Upon successful completion of this session, you will be able to:-Understand basic Online Analytical Processing (OLAP) concepts.-Comprehend the Epicor EPM Platform structure and data flow behind the cube.-Name the four components of Cube Connect and understand their interaction.-Use the EPM Glossary Designer to create your own business definitions.-Manage EPM cubes using the EPM Server Management Console.-Use the Cube Connect - Cube Editor application to create user cubes from a cube template.-Deploy a customized user cube using Cube Connect - Cube Manager.-Gain an understanding of the Cube Connect - EPM Content Packager and EPM Content Pack Deployer.-Work with an EPM Cube within SQL Server Analysis (SSAS). AUDIENCE: This session will appeal to the following audiences: Business Analysts, Sales Manager, Controller, CFO PREREQUISITES: Required Courses: None. Recommended industry knowledge of online analytical processing (OLAP), and Microsoft SQL Server Analysis Services. APPLICABLE PRODUCTS: This session will be of benefit to customers running any Vantage, Vista or Epicor 9.x. PROGRAM LEVEL: Intermediate FIELD OF STUDY: Computer Science CPE CREDITS: 4.0 COST: There is an additional $250 fee to attend this session.

Extended Education: Intermediate Report Writing

Hands-on is the most effective way to learn how to create reports using the report writer tool. Take advantage of this four-hour session to apply what you know about report writer. We’ll show you how to create different reports using the PSUB and AR files using the tools and techniques available in Report Writer. OBJECTIVES: Build reports using PSUB and AR. Understand formatting, breaking, and totaling. Learn how to create formula columns. Properly select and sort data for these files. AUDIENCE: System administrator or person responsible for creating custom reports within the organization. PREREQUISITES: Attendees should have basic report writing skills and an understanding of files and dictionaries in Eclipse. APPLICABLE PRODUCTS: This session will be of benefit to customers running Eclipse. PROGRAM LEVEL: Intermediate. FIELD OF STUDY: Computer Science. CPE CREDITS: 4.0 COST: There is an additional $250 fee to attend this session.
Extended Education: Manage your complex parts with the Epicor ERP Configurator

This extended education session introduces you to the Configurator Designer and the use of its design tools. The Configurator Designer facilitates ordering items with complex requirements and a variety of options, and enables on-the-fly configuration of highly customizable and dimensional products. This session provides a foundation for using the Configurator Designer to create unique product configurations based on user input or selections. It also focuses on how to set up the universal method and rules base, and execute these rules to achieve unique product designs. **OBJECTIVES:** Upon successful completion of this session, you will be able to: - Explain module features and their usage to define unique product configurations. - Define the product that is going to be configured. - Describe the basic concepts of Input Sheets and Input Fields and their relevance in the Configuration process. - Describe the basic concepts of the Dynamic List functionality and its relevance to the Configuration process. - Describe the basic concepts of Method Rules and their relevance to the Configuration process. - Configure Subassemblies. - Describe the basic concepts of Document Rules and their relevance to the Configuration process. - Understand the Import and Export Configuration. - Test the configuration. **AUDIENCE:** This session will appeal to the following audience: Shop Employees, System Administrators, Order Entry Staff, Sales Staff **PREREQUISITES:** Required Courses: None **APPLICABLE PRODUCTS:** This session will be of benefit to customers running Epicor 9.x. **PROGRAM LEVEL:** Basic **FIELD OF STUDY:** Production **CPE CREDITS:** 4.0 **COST:** There is an additional $250 fee to attend this session.

Extended Education: Material Requirements Planning (MRP) in Vantage, Vista & Epicor 9.x

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. **OBJECTIVES:** Upon successful completion of this session, you will be able to: - 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:** This session will appeal to the following audience: COO/Operations Manager, Scheduler, Shipping and Receiving, Production Manager, Purchasing Staff/Buyer **PREREQUISITES:** Required Courses: None **APPLICABLE PRODUCTS:** This course will be of benefit to customers running any Epicor Vista, Epicor Vantage, and Epicor 9.x. **PROGRAM LEVEL:** Basic **FIELD OF STUDY:** Production **CPE CREDITS:** 4.0 **COST:** There is an additional $250 fee to attend this session.
Extended Education - Crystal Reports Part 1

Crystal Reports is the standard for high performance enterprise reporting. This extended education session is designed to walk you through, step-by-step, designing your first Crystal report. You will learn how to connect to a Prophet 21 database, link tables, and create customized reports for your organization. Your skills will be taken to the next level when you learn how to add calculations, parameter prompts, and grouping. The course will conclude by showing you how to add conditional formatting to a field, rank report values, and drill down into the data retrieved. Anyone involved in creating reports from stored data will benefit from this information-packed session. Note: This is the first half of a two-part class.

OBJECTIVES: - Create basic reports from scratch. - Link tables together using primary keys. - Summarize data via grouping. - Limit data retrieved using parameters. - Add formulas to a report. - Conditionally format fields. - Examine report results by drilling down into source data. AUDIENCE: System Administrators, Managers responsible for reporting

PREREQUISITES: Familiarity with basic Windows functions. - Understanding of Prophet 21 database structure. - Knowledge of Prophet 21 functionality.

APPLICABLE PRODUCTS: Prophet 21

PROGRAM LEVEL: Intermediate.

FIELD OF STUDY: Computer Science.

CPE CREDITS: 4.0

COST: There is an additional $250 fee to attend this session.
Extended Education: Investing in Education - Is Your Company On Track with Epicor University?

Your company has made two huge investments - employees and technology. Other than your inventory, these are the two areas where you’re probably invested the most…and you need to get the most out of each investment. The funny thing is, they both rely heavily on each other your people are hindered without good technology and technology is useless without skilled people to drive it. So make no mistake, a highly skilled workforce is a differentiator, and the learning function is the focus of this extended session to help you get the results you need to be competitive. There’s a saying we continue to repeat all the time in this business. You don’t know what you don’t know. Your Epicor system is extremely deep and functionally rich. You may know a ton about the software, but guarantee there are features you simply aren’t aware exist. You don’t know what you don’t know. In this hands-on session you will develop your education plan for your company. **OBJECTIVES:**

- Understand the resources and tools available from Epicor University.
- Practice completion of a needs and skills assessment for your company.
- Create the education proposal for your company across each department and role with template provided.
- Develop an education road map for at least one role within your company leave with the template to develop more.
- Prepare a training budget and proposal. **AUDIENCE:** Project Team Leads, ERP/Distribution Implementation Manager/Leads, IT, Trainers, Training Managers **PREREQUISITES:** None

**PRODUCT LINES:** All  
**FIELD OF STUDY:** Computer Science  
**CPE CREDITS:** 4 Credits  
**COSTS:** There is an additional $250 fee to attend this session.
This extended session focuses on the advanced features of Epicor Service Connect and how to integrate it with the Epicor application. Service Connect supports specific collaborative processes, connecting different business entities, applications, or users. Service Connect uses open, industry wide standards and technology that enables businesses to deploy solutions now, confident their investment will remain mainstream for the foreseeable future. Service Connect harnesses the power of XML, electronic message transfer, and processing environments to deliver reliability combined with ease of use. Service Connect supports a rich workflow environment where users can link individual workflows to business events, run Service Connect business logic, or interact with other users through a task list, e-mail, and so forth. Workflow Designer is an integrated environment for creating new workflows or inserting new business logic units into existing workflows to tailor them to customer needs. In Workflow Designer, the user can customize a workflow graphically with drag-and-drop functionality or point-and-click technology.

**OBJECTIVES:** Upon successful completion of this session, you will be able to:
- Import and test .NET assembly references.
- Apply WSE 3.0 server policy.
- Perform advanced database operations.
- Access channel information in a workflow.
- Restore connectivity settings.
- Execute synchronous sub-workflows in batches to test system performance.
- Break sub-workflow execution.
- Use Business Logic Tester to explore a business object.
- Use Business Process Management to call Epicor Service Connect workflow.
- Create a customized view in Document Tracking.

Note that all course materials will not be covered during this four hour session, but are provided for self-study after the conference.

**APPLICABLE PRODUCTS:** This session will be of benefit to customers running any Epicor Vista, Vantage or those who have just moved to a Epicor 9.x version.

**PROGRAM LEVEL:** Advanced

**FIELD OF STUDY:** Computer Science

**CPE CREDITS:** 4.0

**COST:** There is an additional $250 fee to attend this session.
Extended Education: Creating End User Procedures with Epicor Knowledge Mentor (EKM)

Epicor Knowledge Mentor (EKM) enables you to easily create, deploy, and manage custom training resources and end user documentation. Delivering unique capabilities, EKM supports broader enterprise software adoption, empowered employees, and improved business performance. This extended education experience explores the Epicor Knowledge Mentor Author, the component used to develop and publish training content and end user materials. With Author, you can easily create demonstrations, simulations, assessments, online help and documentation in multiple formats (Microsoft® Word®, Microsoft PowerPoint®, PDF, and HTML) from a single source. OBJECTIVES: Upon successful completion of this session, you will be able to: - Create a new project. - Create the content structure, which includes creating the book, it pages, and lesson group. - Record content. - Generate related documents and materials. - Edit content playback. - Edit lesson topics. AUDIENCE: This session will appeal to the following audience: - Users responsible for writing End User Procedures - IT/System Administrators

PREREQUISITES: Required courses: Navigation APPLICABLE PRODUCTS: This session will be of benefit to customers running any Epicor Vista, Vantage, Express, and Epicor ERP version. PROGRAM LEVEL: Intermediate FIELD OF STUDY: Computer Science CPE CREDITS: 4.0 COST: There is an additional $250 fee to attend this session.

Extended Education: Eclipse Reports

Eclipse Reports is the reporting tool standard with Solar Eclipse. This is a web-based application that links to your Eclipse database for easy reporting. In this 4-hour, hands-on environment, you'll learn how to create a report and share it to others in your company that is quick and painless. OBJECTIVES: - Understand the Categories and Sub Categories within the system. - Learn how to create reports using the Products, Sales, Customers and Accounting Categories. - Learn the differences between Run-time filters and Post filtering. - Learn how to Share and schedule reports. AUDIENCE: Anyone in the organization who is responsible for creating reports within the Solar application. PREREQUISITES: Basic understanding of your business operations. APPLICABLE PRODUCTS: This session will be of benefit to customers running Eclipse. PROGRAM LEVEL: Basic - Intermediate. FIELD OF STUDY: Computer Science. CPE CREDITS: 4.0 COST: There is an additional $250 fee to attend this session.
Extended Education: Epicor 9 Power Financials

This extended education experience is aimed directly at Financial Professionals facing complex organizational, transactional, and reporting procedures. Focusing on the power of the Epicor 9 Financial tools, this session will help you better design and use the Epicor 9 application to make your job easier and more efficient. **OBJECTIVES:** Upon completion of this session, you will be able to: - Describe the benefits and flexibility of having a user-defined COA structure. - Understand the power of the Posting Engine and related GL Transaction Types and Control Codes. - Set up and use Advanced Allocations. - Know when, why, and how to leverage multiple GL books. - Describe the Epicor 9 Consolidation tools. - Understand how to set up and use multiple currencies, rate conversion rules, exchange rates, and reporting currencies. **AUDIENCE:** This session will appeal to the following audiences: - Financial professionals using Epicor ERP or considering moving to Epicor ERP. **PREREQUISITES:** Required courses: Financial Foundations **APPLICABLE PRODUCTS:** This session will be of benefit to customers running Epicor 9.x. **PROGRAM LEVEL:** Intermediate **FIELD OF STUDY:** Accounting **CPE CREDITS:** 4.0 **COST:** There is an additional $250 fee to attend this session.

Extended Education: How to Manage Projects with Epicor ERP

Project management allows you to organize and plan the manufacture of large capital projects that need to be controlled at different levels. Project management enables you to create, monitor, and complete complex manufacturing projects successfully. This extended education session reviews the project management flow in the Epicor application. Topics include phase and task entry in Project Entry, Microsoft® Project® integration with other Epicor application programs, project analysis to analyze costs and performance, and finally, project progress monitoring with the Project Tracker. **OBJECTIVES:** Upon successful completion of this session, you will be able to: - Understand the purpose and features of project management. - Learn Project Entry's main functionality. - Create parent and child WBS Phases. - Link jobs, sales orders, purchase orders, quotes, and tasks to a project. - Use the Build Project Analysis process to build and calculate project costs. - Use the Job Scheduling Board to determine the estimated and actual project schedule. - Assign checklist tasks and monitor each task’s progress and status. - Define milestones to create project billing. - Generate milestones and the final billing for a project. - Use the Project Tracker to track a project. - Review the import and export features with Microsoft Project. **AUDIENCE:** This session will appeal to the following audience: Project Managers, Sales Managers **PREREQUISITES:** Required courses: Navigation, Job Management Recommended industry knowledge of project management and the manufacturing process flow. **APPLICABLE PRODUCTS:** This session will be of benefit to customers running Epicor 9.x. **PROGRAM LEVEL:** Intermediate **FIELD OF STUDY:** Production **CPE CREDITS:** 4.0 **COST:** There is an additional $250 fee to attend this session.
**Extended Education: Introduction to Advanced Financial Reporting (AFR)**

Get hands on with the Epicor Advanced Financial Reporting (AFR) tool in a lab-based environment with general function tutorials and report structure building. Newly released in 2010, this feature rich financial reporting tool can be used as an extend solution across many of Epicor’s product offerings to create, collaborate, and distribute professional financial reports. Come to this session for a general tutorial of Epicor AFR. **OBJECTIVES:** Upon completion of this session, you will be able to:-Understand the basics functionality of the new Advanced Financial Reporting tool.-Describe how to create a financial report structure foundation. **AUDIENCE:** This session will appeal to the following audience: Report Writers, System Administrators, Controller/CFO, Accountants  **PREREQUISITES:** Required courses: Financial Foundations  **APPLICABLE PRODUCTS:** This session will be of benefit to customers running Epicor 9.x. **PROGRAM LEVEL:** Basic  **FIELD OF STUDY:** Accounting, Finance  **CPE CREDITS:** 4.0  **COST:** There is an additional $250 fee to attend this session.

**Product Line(s):**  Epicor 9  
**Epicor University Certified:**  Yes  
**CPE Credit:**  Yes  
**Technical Track:**  No  
**Session Level:**  Beginner  

**Extended Education: Introduction to Updatable Dashboards in Epicor 9.05**

This extended education session is designed to introduce the new Updatable Dashboard functionality. The updatable dashboard is an extension to the standard dashboard capabilities used to place updatable Business Activity Queries (BAQs) on either a client dashboard or a mobile device dashboard. When you configure the dashboard with updatable Business Activity Queries (BAQs), the dashboard behaves like a standard Epicor form allowing you to review and update data right from the form you create. The advanced dashboard techniques discussed in this session provide flexibility with the way the data displays and functionality that allows you to access the data you need. It is expected that users taking this course have previous familiarity with the dashboard. This course does not review basic elements and functionality of the dashboard but focuses on advanced techniques not discussed in the Introduction to the Dashboard session. This course will be of benefit to customers running or looking to upgrade to Epicor 9.05. **OBJECTIVES:** Upon successful completion of this session, you will be able to:-Create an updatable business activity query-Create an updatable dashboard-Use the excel uptake and the publish view functionality-Create a mobile device dashboard **AUDIENCE:** This session will appeal to the following audience: System Administrator, IT/Technical Staff  **PREREQUISITES:** Required Courses: Navigation, Introduction to the Dashboard, Business Activity Queries (BAQs)  **APPLICABLE PRODUCTS:** This session will be of benefit to customers running Epicor 9.05. **PROGRAM LEVEL:** Intermediate  **FIELD OF STUDY:** Computer Science  **CPE CREDITS:** 4.0  **COST:** There is an additional $250 fee to attend this session.
Lean business operations have become integral to profitability in today’s competitive marketplace. Defining and driving Value for the customer through simplified pull systems reduces cost and improves quality throughout the organization. This course delivers an introduction to Lean methodology and provides students with practical tools that can be immediately implemented to reduce waste in the organization. At the end of the module participants will have a strong understanding of core lean techniques and be able to relate these practices to common everyday business scenarios. Students will learn to recognize Muda, or waste, in the business through Value Stream Mapping and select the proper Lean metrics to measure operations.

**OBJECTIVES:** Upon successful completion of this session you will be able to:- Understand the importance of implementing Lean techniques in your business- Learn how to correctly define Value in the business through the Voice of the Customer- Understand the importance of Pull systems in Lean organizations- Identify examples of the seven deadly wastes in your business and techniques for eliminating them - Produce Value Stream Maps that clearly communicate process flow in your business

**AUDIENCE:** This course will appeal to the following audience: Operations Managers, Project Managers, Shop Floor Supervisors, Warehouse Managers, Safety Managers, Information Technology professionals, Finance managers, Purchasing Managers, Engineering Managers, All individuals interested in understanding Lean methodologies in production environments.

**PREREQUISITES:** Basic to intermediate knowledge of manufacturing and distribution operations and best practices. Prior experience in implementing process changes in a business environment. Students that would like to be best prepared will read: *Lean Thinking by James P. Womack* - *Learning to See by John Shook* (Spiral-bound)

**APPLICABLE PRODUCTS:** This course will be of benefit all customers and prospects.

**PROGRAM LEVEL:** Intermediate.

**FIELD OF STUDY:** Computer Science.

**CPE CREDITS:** 4.0

**COST:** There is an additional $250 fee to attend this session.
A key objective for network administrators is to maximize application performance, as this improves the efficiency organizations gain from their software investment. This session explores how you can improve the performance of your Epicor application. Tools and hardware recommendations are now available from Epicor that can help evaluate both application processes and network traffic, giving you the data to identify what changes can be made to achieve efficient performance. This session will focus on the Performance Diagnostic Tool, a monitoring application that evaluates processing logs on both client and server installations of the Epicor application. You can then use this performance data to strategize ways to better leverage network resources. Information on virtual environments is also included in the discussion. Virtual environments provide flexibility and can scale up or down more easily than physical environments, giving you additional performance tuning options. This extended session will lastly explore changes you can make to Progress and SQL databases that improve performance. **OBJECTIVES:** Upon successful completion of this session, you will be able to: -Understand how you can improve the performance of your Epicor application. -Choose the right tools and hardware to improve efficiency with your overall systems performance. -Use the Performance Diagnostic Tool for monitoring application performance. -Understand the functionality difference between virtual and physical environments. -Modify Progress and SQL databases to improve performance. **AUDIENCE:** This session will appeal to the following audiences: Network Administrators, Managers responsible for exploring ways to improve efficiency of applications and network systems. **PREREQUISITES:** Required Courses: None. Recommended to have knowledge of network hardware, network and client software, and database management. **APPLICABLE PRODUCTS:** This session will be of benefit to customers running any Epicor Vista, Vantage, and Epicor 9.x version. **PROGRAM LEVEL:** Intermediate **FIELD OF STUDY:** Computer Science **CPE CREDITS:** 4.0 **COST:** There is an additional $250 fee to attend this course.
Extended Education: Product Data Management and Job Control

In this extended education session, you will discover more efficient processes for production data management and job control. From the entry of parts, identifying stock vs. non stock, you will understand how these triggers effect production. Moving from basic parts into the creation of an engineering workflow, this design will help demonstrate purposeful tracking down to the individual tasks and resources. Discuss and demonstrate subassembly pull quantities through hands-on workshops to realize the flexibility within the application. Finally, production and job control benefits are seen through the use of the advanced shop communication tools the Epicor application offers to alert teams when issues are about to arise. **OBJECTIVES:** Upon successful completion of this session, you will be able to:-Describe the system logic in relation to the Part Maintenance Stock and Non Stock triggers.-Create an Engineering Workflow for more streamlined tracking.-Utilize the subassembly pull quantity functionality.-Describe when to use a job to job link.-Utilize some of the various shop communication tools Epicor ERP offers for more efficient Production Management. **AUDIENCE:** This session will appeal to the following audience: Operation Managers, Production Managers, Shop Floor Managers, Shop Floor Employees, Engineers **PREREQUISITES:** Required courses: Epicor 9 Navigation course, System Flow Course, Parts Course **APPLICABLE PRODUCTS:** This session will be of benefit to customers running Epicor 9.x. **PROGRAM LEVEL:** Basic **FIELD OF STUDY:** Production **CPE CREDITS:** 4.0 **COST:** There is an additional $250 fee to attend this session.

Extended Education: Updating and Creating Reports with Microsoft SQL Server using SSRS, Part 1

Microsoft SQL Server Reporting Services (SSRS) 2008 provides a complete, server-based platform designed to support a wide variety of reporting needs, enabling organizations to deliver relevant information where needed across the entire enterprise. Join us for a look at how to get the most from this important reporting resource. During this training session, you will receive an introduction to 2008 SSRS, a new alternative for reporting in Epicor 9.05. You will learn how to create new and amend existing reports using both the Report Builder Tool and Visual Studio 2008, how to test reports before development, and the methods available for distributing reports; as files or through a standard viewer. **OBJECTIVES:** Upon successful completion of this session, you will be able to: -Understand Reporting Services Architecture. -Identify Epicor SSRS components. -Create an SSRS report linked to Epicor 9 database. -Link an SSRS report. **AUDIENCE:** This session appeals to the following audience: -System Administrators -Business Analysts **PREREQUISITES:** Required Courses: None. Recommended to have a good understanding of the database structure. **APPLICABLE PRODUCTS:** This session benefits customers running -Epicor 9.x and customers planning an upgrade to Epicor 9.x **PROGRAM LEVEL:** Intermediate. **FIELD OF STUDY:** Computer Science. **CPE CREDITS:** 4.0 **COST:** There is an additional $250 fee to attend this session.
Extended Education - Crystal Reports Part 2

Crystal Reports is the standard for high performance enterprise reporting. This extended education session has been designed to walk you through, step-by-step, designing your first Crystal report. Attendees will learn how to connect to a Prophet 21 database, link tables, and create customized reports for their organization. Your skills will be taken to the next level when you learn how to add calculations, parameter prompts, and grouping. The course will be rounded out by showing you how to add conditional formatting to a field, rank report values, and drill down into the data retrieved. Anyone involved in creating reports from stored data will benefit from this information-packed session. Note: This is the second half of a two-part class.

OBJECTIVES: Create basic reports from scratch. - Link tables together using primary keys. - Summarize data via grouping. - Limit data retrieved using parameters. - Add formulas to a report. - Conditionally format fields. - Examine report results by drilling down into source data.

AUDIENCE: System Administrators, Managers responsible for reporting

PREREQUISITES:
Familiarity with basic Windows functions. - Understanding of Prophet 21 database structure. - Knowledge of Prophet 21 functionality. APPLICABLE PRODUCTS: Prophet 21

PROGRAM LEVEL: Intermediate.

FIELD OF STUDY: Computer Science. CPE CREDITS: 4.0 COST: There is an additional $250 fee to attend this session.
Extended Education: Advanced Business Process Management (BPM) in Vantage, Vista & Epicor 9.x

The Epicor Business Process Management (BPM) extended education experience provides students with the necessary skills for creating BPM method directives that modify how business processes run. This is the real power and potential of your Epicor ERP system as BPM lets you modify and extend processes, policies and controls by intercepting standard processes before (or after) they happen to insert your own business rules. BPM will let you validate, manipulate, and create workflows around the data being brought into, passed through, and pushed out of the application. The goal of this course is to give students the ability to set up, maintain, and run primary BPM method directives. The course explores creating BPM hold types and attaching a hold to a specific record. It will teach 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. **OBJECTIVES:** Upon successful completion of this session, you will be able to: -Understand the functionality of business processes. -Develop the ability to use both BPM holds and method directives. -Understand the three kinds of method directives. -Gain a working knowledge of available conditions and actions. -Create beginning method directives. -Understand how to import, export, and update method directives. **AUDIENCE:** This session will appeal to the following audience: Business analysts, System administrators, Technical staff responsible for system modification. **PREREQUISITES:** Required course: Navigation Recommended knowledge of Business Process Management. **APPLICABLE PRODUCTS:** This session will be of benefit to customers running any Epicor Vantage, Vista, or Epicor ERP version. BPM was added at version 8.03 and is present in all versions thereafter through version 9. **PROGRAM LEVEL:** Intermediate **FIELD OF STUDY:** Computer Science **CPE CREDITS:** 4.0 **COST:** There is an additional $250 fee to attend this session.

Extended Education: Advanced Report Designing with AFR

The Advanced Report Designing for AFR course guides customers familiar with the Advanced Financial Reporting (AFR) Report Designer module to create custom financial reports that include formulaic expressions, multiple versions of row sets, reporting trees, and dictionaries. The course also demonstrates how to add drill down reports to the transactional level, drill down to different reports from particular rows, update Report Definition Language (RDL) file formats, and create report templates using AFR - Microsoft Visual Studio. Through a series of workshops, you will build an example summary level Sales Revenue report, with a drill down to a detail level report, which in turn has a drill down to the transaction level. **OBJECTIVES:** Upon successful completion of this session, you will be able to: -Create complex expressions using the Expression Builder. -Create custom financial reports that include formulaic row and column expressions. -Set up reporting trees. -Define and add report dictionaries to row and column sets. -Drill down report rows to obtain detailed data and transaction data. -Update RDL Files using AFR - Microsoft Visual Studio. **AUDIENCE:** This session will appeal to the following audience: Report Writers, System Administrators, Controller/CFO, Accountants. **PREREQUISITES:** Required Courses: Introduction to AFR. **APPLICABLE PRODUCTS:** This session will be of benefit to customers running any Epicor Vantage, Epicor Vista, or Epicor 9.x version. **PROGRAM LEVEL:** Intermediate **FIELD OF STUDY:** Accounting **CPE CREDITS:** 4.0 **COST:** There is an additional $250 fee to attend this session.
Extended Education: BPM and Your Basic Needs

The Business Process Management (BPM) tools offer a wide array of functionality you can leverage to extend the Epicor application without touching a single line of source code. By implementing a few easy-to-create BPM methods, you can prevent inconsistent data and alert specific users about important database activity. During this extended education session, we will open the BPM tool box and try out fundamental BPM techniques. The session will explore how to find the database tables you wish to monitor and then create the corresponding BPM alerts and validation methods. The session will also explore how you export and import a group of BPM methods for use by other departments in your organization. Taught by Mark Jensen, Principal University Specialist at Epicor Software Corporation, this session will help you take the first step to applying BPM to your business flow. **OBJECTIVES:** Upon successful completion of this session, you will be able to:-Understand the functionality of Epicor Business Process Management (BPM).-Use the BPM Wizards.-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. **AUDIENCE:** This course will appeal to the following audience:-Business analysts-Power users-System administrators-Technical staff **PREREQUISITES:** Required Courses: Navigation **APPLICABLE PRODUCTS:** This course will be of benefit to customers running any of Epicor Vantage, Vista, or Epicor ERP version. BPM was added at version 8.03 and is present in all versions thereafter through version 9. **PROGRAM LEVEL:** Basic **FIELD OF STUDY:** Computer Science **CPE CREDITS:** 4.0 **COST:** There is an additional $250 fee to attend this session.

Extended Education: Classify and User-Defined Screens

In this 4-hour, hands-on session, learn how to create your own user-defined screens within the Eclipse application. With this tool you can provide information to your staff in a quick and efficient manner, all designed by you! You will learn about the ability to link these custom screens to an existing Eclipse screen or add it to your users' menus. **OBJECTIVES:** - Learn how to build a screen for use in both Eterm and Solar. - Learn how to insert fields within the screen for viewing or editing. - Learn how to add screen to menu and/or Eclipse screen. **AUDIENCE:** System Administrators or anyone capable of creating dictionaries and reports within your Eclipse system. **PREREQUISITES:** You must have a strong familiarity with the Eclipse file structure and dictionaries before attending this class. **APPLICABLE PRODUCTS:** This session will be of benefit to customers running Eclipse. **PROGRAM LEVEL:** Basic **FIELD OF STUDY:** Computer Science. **CPE CREDITS:** 4.0 **COST:** There is an additional $250 fee to attend this session.
Extended Education: Creating High Performance

Creating High Performance answers the two questions that all companies struggle with: 1. What is it that we must improve as a company to achieve breakthrough financial, service and growth performance in our business? 2. How do we actually go about improving our company’s performance to create sustainable results that really matter? Companies who successfully manage the transition from a sales/product dominated environment to a process execution oriented environment are the companies who have strong financial performance, are the service leaders in their markets, and grow faster than their competitors. Yet, the majority of companies struggle with this critical transition to process execution. The challenges in this transition range from misaligned strategic effort (the what); through to individual improvement efforts that have little real impact (the how). Improving performance is a process that can be both strategically aligned and tactically delivered. OBJECTIVES: - Educate students on the relationship between high performance metrics and the processes that deliver that performance. Introduce a complete process to implement sustainable performance improvements that generate results that matter to your business and improve business value. - Aligning your business’ improvement effort with business goals. AUDIENCE: CEOs, COOs, CFOs, Operations Managers, Purchasing Managers, Project Managers, Sales Managers, Warehouse Managers, Rising Stars PREREQUISITES: Operational Excellence- None APPLICABLE PRODUCTS: All customers and product lines would benefit from this session. PROGRAM LEVEL: Intermediate. FIELD OF STUDY: Computer Science. CPE CREDITS: 4.0 COST: There is an additional $250 fee to attend this session.

Extended Education: Eclipse Real-Time Accounting with Scott Zahn

An essential part of Eclipse is that it is a real time, transactional based accounting system. Instead of batch accounting processes that accountants are familiar with in traditional ERP systems, Eclipse will post to the general ledger on each individual accounting event associated with a transaction. Therefore, it is imperative for a comptroller, CFO, or accountant understand how Eclipse answers: 1. What Branch? 2. What Date? 3. What General Ledger account? 4. How much? For every debit and credit on every sales order, purchase order, transfer order, inventory adjustment, cash receipt, payable invoice, cash disbursement, and journal entry. This class will teach the T accounts for these eight transactions. OBJECTIVES: - Learn details on Real-time accounting in Eclipse, - Understand how your GL is updated and how you can modify it to be right for you. PREREQUISITES: Basic understanding of T accounts. APPLICABLE PRODUCTS: This session will be of benefit to customers running Eclipse. PROGRAM LEVEL: Basic. FIELD OF STUDY: Finance. CPE CREDITS: 4.0 COST: There is an additional $250 fee to attend this session.
Extended Education: Introduction to Service Connect - Extending Your System

This course focuses on the main features of Epicor Service Connect and how to integrate it with the Epicor 9, Vantage, and Vista. Service Connect is a powerful development tool that harnesses the power of XML and other open standards to allow you to build workflows which can automate processes within an application or connect different business entities, applications, or users. Service Connect workflows use XML documents as the primary interface. The workflows are designed to send documents to, and use documents from exposed services of other applications, such as web services or Windows® Communication Foundation® services. Service Connect workflows convert this data so information is ready to use by other processes. By using the document as the interface, you can quickly integrate applications and processes into a loosely-coupled environment -- much more quickly than into an environment built on traditional programming practices. Service Connect is designed to fully leverage the Service Oriented Architecture (SOA) of other applications. You can set up Service Connect workflows themselves as services designed to consume and return information on demand. In that sense, you can use Service Connect to create its own SOA environment. Note that all course materials will not be covered during this four hour session, but are provided for self-study after the conference.

OBJECTIVES: Upon successful completion of this session, you will be able to:
- Understand how Service Connect is built to support processes that connect different business entities, applications, and users.
- Become familiar with Service Connect services.
- Work with the Administration Console to define connectivity processing options for Service Connect.
- Use the Workflow Designer to define workflows.
- Create conversions and web methods to transform a set of data from a specific source format to a specific target format.
- Use different activities, such as choice, post, or task.
- Work with the Task Monitor.
- Process an external file, such as a comma separated (.csv) text file or Microsoft® Office® Excel® (.xls) file, as input to Service Connect.
- Import .NET assembly references.
- Use the DBOperation element to run statements against the application database.

AUDIENCE: This session will appeal to the following audience: System Administrator, IT/Technical Staff

PREREQUISITES: Required Courses: Navigation and Database Concepts

APPLICABLE PRODUCTS: This session will be of benefit to customers running any Epicor Vista, Vantage, and Epicor 9.x.

PROGRAM LEVEL: Basic

FIELD OF STUDY: Computer Science

CPE CREDITS: 4.0

COST: There is an additional $250 fee to attend this session.

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Extended Education: Preparing for a Successful Upgrade with Epicor ERP

Traveling the upgrade road? You do not have to travel alone. You will leave this four hour session with complete plan considerations, hardware planning and data planning steps. Learn how a successful upgrade can be completed with proper planning. **OBJECTIVES:** Upon successful completion of this session, you will be able to: - Identify the planning steps for a successful upgrade. - Present version considerations. - Understand how to move from version 6.1 to version 9.05. - Understand how to move from version 8.03.40x to version 9.05. - Know how to test your upgrade. - Identify the steps in execution and how to get there. - Create the go live plan. **AUDIENCE:** This session will appeal to the following audience: - System Administrators or users responsible for upgrading their organizations Epicor application. **PREREQUISITES:** Required Courses: None **APPLICABLE PRODUCTS:** This session will be of benefit to customers running any Epicor Vantage, Vista, or Epicor ERP versions. **PROGRAM LEVEL:** Basic **FIELD OF STUDY:** Computer Science **CPE CREDITS:** 4.0 **COST:** There is an additional $250 fee to attend this session.

Extended Education: Tactical Techniques for Project Management and Project Planning

Good Project Management is instrumental in making any business successful. In this extended education session, you will learn strategies on how to develop a more consistent methodology for project management. With the right leadership and well defined roles, your organization can improve project control and overall communication. **OBJECTIVES:** Upon successful completion of this session, you will be able to: - Identify the elements of project control. - Explain the appropriate roles of the leader and team members. - Describe tools that are valuable to manage a project. - Explain how to develop business process mapping for the current method or desired method. - Improve communication within your organizational teams. **AUDIENCE:** This session will appeal to the following audience: Project Managers, Business Professionals. **PREREQUISITES:** This session will be of benefit to customers running any Epicor application. **PROGRAM LEVEL:** Intermediate **FIELD OF STUDY:** Computer Science **CPE CREDITS:** 4.0 **COST:** There is an additional $250 fee to attend this session.
Extended Education: Updating and Creating Reports with Microsoft SQL Server using SSRS, Part 2

A continuation of Microsoft SQL Server Reporting Services (SSRS) Part 1, a discussion of the robust reporting platform available for use in the Epicor application. In this session, learn how to quickly create SSRS reports using the wizard-driven interface. After practicing the simpler forms of report creation, you will learn how the shipping Epicor SSRS reports are constructed, as well as how to copy and edit shipping reports. In the latter part of the class, report deployment and SSRS installation tips will be covered.

OBJECTIVES: Upon successful completion of this session, you will be able to: -Create SSRS reports through the Wizard interface. -Construct, copy, and edit Epicor SSRS shipping reports. -Understand installation and report deployment processes. 

AUDIENCE: This session will appeal to the following audience: -System Administrators -Business Analysts -Report writers

PREREQUISITES: Required Courses: None. Recommended to have a good understanding of the database structure.

APPLICABLE PRODUCTS: This session will be of benefit to customers running Epicor 9.x and customers planning an upgrade to Epicor 9.x.

PROGRAM LEVEL: Intermediate
FIELD OF STUDY: Computer Science
CPE CREDITS: 4.0
COST: There is an additional $250 fee to attend this session.
Extended Education: What's New in Epicor ERP Manufacturing

This extended education experience introduces key Manufacturing features and functionality of Epicor 9 and 9.05 - a must-attend event for Epicor Vantage and Vista customers. The purpose of this course is to provide you with a detailed overview of the new features within the Epicor 9 and 9.05 release. Though not exhaustive, this course will consider all the essential enhancements of Epicor's latest releases and provides ample opportunity to see demonstrations of new capabilities while getting hands-on experience. OBJECTIVES: Upon successful completion of this session, you will be able to:- Understand the differences between Vantage and Vista and Epicor 9.05 (inclusive of Epicor 9).- Gain a clear understanding of the major engines within Epicor 9.05.- Better plan for an upgrade to your latest release.

AUDIENCE: This session will appeal to the following audience: Users of Epicor Vantage and Vista versions

PREREQUISITES: Required course: Navigation

APPLICABLE PRODUCTS: This course will be of benefit to customers running any of Epicor Vantage, Vista, or those who have just moved to Epicor 9.x.

PROGRAM LEVEL: Basic

FIELD OF STUDY: Production

CPE CREDITS: 4.0

COST: There is an additional $250 fee to attend this session.