



Kinetic and Senior Living Extended Education

Insights 2024: 11-12 August Gold Coast, QLD, Australia



Extended Education for Insights ANZ

Our elite training sessions, developed by the Epicor worldwide Epicor Learning team, Product Management, Development, Support, and Services will be available Sunday, 11th and Monday, 12th August prior to the conference. Extended Education sessions are not included in your Insights registration fee.

These focused, four-hour intensive labs will showcase powerful new technologies, ideas, capabilities, and applicable solutions! Deep dive into hands-on workshops that help you gain practical skills. Get access to industry-leading guidance, discuss best practices from your peers, chat with subject matter experts, and push the pedal to quicken your pace on the path to progress. Attendees will need to bring their own laptops.

Sessions are four hours long and run from 8:00am to 12:00pm or 1:00pm to 5:00pm. Each course cost is \$350 AUD.

Below are the Extended Education sessions. Be sure to review the detailed descriptions on the following pages.

Sunday AM 8:00-12:00	Sunday PM 1:00-5:00	Monday AM 8:00-12:00	Monday PM 1:00-5:00
EE 1: Creating Advanced Business Activity Queries (BAQs) for Better Data Management [Kinetic & SLS]	EE 4: Automating Your Business Processes with Functions: Advanced [Kinetic & SLS]	EE 7: Epicor ECM Advanced including Intelligent Document Capture (IDC) Configuration for Kinetic [Kinetic & SLS]	EE 10: Real-World Techniques for Automation Studio, Powered by Workato, for Kinetic [Kinetic & SLS]
EE 2: Driving System Enhancements with Application Studio Fundamentals [Kinetic & SLS]	EE 5: Expanding System Enhancements with Application Studio: Advanced [Kinetic & SLS]	EE 8: Automating Your Business Processes with BPMs: Beginner [Kinetic & SLS]	EE 11: Automating Your Business Processes with BPMs: Advanced [Kinetic & SLS]
EE 3: Advanced Inventory Features in Kinetic [Kinetic & SLS]	EE 6: Job Management Utilizing Kinetic Advanced Manufacturing Features [Kinetic]	EE 9: Advanced Requisition Management (ARM) [Kinetic & SLS]	EE 12: Utilising FP&A Advanced Reporting and Budgeting, including Understanding Business Rules with Assumptions Logic [Kinetic & SLS]





EE 1: Creating Advanced Activity Business Queries (BAQs) for Better Data Management

Program Level: Advanced

This Kinetic course showcases Business Activity Query (BAQ) features that go beyond building simple queries. Create Intercept and Except queries that determine differences between two sets of data. Learn how to aggregate data into row and column matrices using the Advanced Group By and PIVOT features and generate hierarchical data using a Common Table Expression (CTE) subquery with recursion. Then pull data from outside Kinetic by creating an External Business Activity Query. The course is designed for learners who are familiar with BAQs and want to explore developing more powerful queries.

Note: This session includes both Kinetic and Classic content for Kinetic and Senior Living users.

Cost: There is an additional \$350 AUD fee to attend this session.

Objectives:

- ◆ Create an Except business activity query
- ◆ Create an Intercept business activity query
- ◆ Create a query that uses an Advanced Group By clause
- ◆ Understand how to use PIVOT table functionality
- ◆ Use the Common Table Expression to display hierarchal data
- ◆ Create an external business activity query that displays data outside of Kinetic

Audience:

- ◆ System Administrator
- ◆ IT/Technical Staff

Prerequisites:

- ◆ Understanding of Business Activity Queries (BAQs)



EE 2: Driving System Enhancements with Application Studio Fundamentals

Program Level: Beginner

When customizing your Kinetic/SLS application screens and dashboards, you use Application Studio. This powerful tool has drag and drop functionality that you leverage to make enhancements to your application - even if you are not a programmer. Use Application Studio to refine user interfaces to fit your organization or business needs. Through this tool, you can create custom filters on grids, set up parent-child grid relationships, add user-defined (UD) columns, and other features that improve your return on investment.

Note: This session is Part 1 and covers the fundamentals of Application Studio. You can also register for Part 2: Expanding System Enhancements with Application Studio: Advanced to learn about more advanced customization features. This session is intended for Kinetic and Senior Living users.

Cost: There is an additional \$350 AUD fee to attend this session.

Objectives:

- ◆ Use the Basic Application Wizard
- ◆ Navigate the Application Map
- ◆ Manage layers
- ◆ Add dashboards to existing forms
- ◆ Create Data Rules
- ◆ Create Parent and Child panel card grids
- ◆ Add User-Defined (UD) columns through drop-down lists and searches
- ◆ Create Events

Audience:

- ◆ Software Developers
- ◆ System Administrators

Prerequisites:

- ◆ Understanding of Business Activity Queries (BAQs)
- ◆ Understanding of User-Defined (UD) columns

EE 3: Advanced Inventory Features in Kinetic

Program Level: Advanced

This session takes you through two important unique features of Kinetic Advanced Inventory management. First, you will learn about how to use the Advanced Unit of Measure, which is useful for anyone needing to manage remnants, as well as track properties of items without the need for additional Parts, Lots, or UOM codes. Secondly, you will learn how to set up and execute Automated Fulfillment flows. This allows the automatic allocation of materials to jobs, and stock to orders and transfers without the need for the Fulfillment Workbench, vastly improving processing efficiency.

Notes: This session is intended for Kinetic and Senior Living users.

Cost: There is an additional \$350 AUD fee to attend this session.

Objectives:

- ◆ Set up and execute the Advanced Unit of Measure functionality
- ◆ Set up and execute Automated Fulfillment for sales orders

Audience:

- ◆ Inventory Manager
- ◆ Sales Personas
- ◆ Warehouse Personas
- ◆ Production Personas

Prerequisites:

- ◆ Understand the basics of Order Fulfillment in Kinetic
- ◆ Understand the basics of Inventory Management in Kinetic

EE 4: Automating Your Business Processes with Functions: Advanced

Program Level: Advanced

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

Note: This session uses the Classic interface and is intended for Kinetic and Senior Living users.

Cost: There is an additional \$350 AUD fee to attend this session.

Objectives:

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

Audience:

- ◆ System Administrator
- ◆ IT / Technical staff

Prerequisites:

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

EE: 5 Expanding System Enhancements with Application Studio: Advanced

Program Level: Advanced

You can continue exploring Application Studio during this advanced course. It begins by first showing the debugging tools that you can activate to troubleshoot issues with your custom layers. The course then covers more advanced customization use cases, such as creating view and date range filters, designing events with multiple actions, calling functions from events, and other features that create enhanced user experiences for your organization and business needs.

Note: This course is Part 2 of the Application Studio series. It covers more in-depth features, so it is recommended that you also register for the Part 1: Driving System Enhancements with Application Studio Fundamentals course. Please learn the basic features before you take this course.

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Cost: There is an additional \$350 AUD fee to attend this session.

Objectives:

- ◆ Debug Kinetic screens
- ◆ Add view option filters on grids
- ◆ Create date range filters on grids
- ◆ Manage layers
- ◆ Use the Condition event action to update data fields
- ◆ Use the Switch event action to update data fields
- ◆ Call custom functions from events

Audience:

- ◆ System Administrators
- ◆ Software Developers

Prerequisites:

- ◆ Basic Knowledge of Application Studio
- ◆ Understanding of Business Activity Queries (BAQs)



EE 6: Job Management Utilizing Kinetic Advanced Manufacturing Features

Program Level: Advanced

Take a bold step towards mastering Epicor's manufacturing tools! Work with co-parts, learn how to use Kanban in Kinetic, and master the use of Data Collection. Improve your production by splitting and batching jobs for better efficiency. This session is intended for Kinetic users.

Cost: There is an additional \$350 AUD fee to attend this session.

Objectives:

- ◆ Work with co-parts
- ◆ Use Kanban in Kinetic
- ◆ Split and batch jobs to improve production
- ◆ Understand the concept of backflushing

Audience:

- ◆ Plant Managers
- ◆ Planners and Schedulers
- ◆ Production Team Leaders
- ◆ Production Managers

Prerequisites:

- ◆ Knowledge of basic Job Management

EE 7: Epicor ECM Advanced includes Intelligent Document Capture (IDC) Configuration for Kinetic

Program Level: Beginner

This Extended Education session provides a technical introduction to features within Epicor ECM (DocStar), with a focus on ECM Workflows, and related tips and tools often used in the course of working with ECM Workflows.

This session would be good for individuals who create ECM workflows or seek to expand their knowledge on in how ECM, from a technical perspective, be used within the organization.

This Epicor Extended Education session for Enterprise Content Management (aka ECM and DocStar) will include various uses of the features within ECM.

NOTE: This session is intended for Kinetic and Senior Living users.

Cost: There is an additional \$350 AUD fee to attend this session.

Objectives:

This session is comprised of nine Sections:

- ◆ Introduction: Level Set, ECM Access, Workflow Refresher, a Workflow modification and some reporting
- ◆ User Input and Flow Control
- ◆ Workflow Performance
- ◆ DataLinks
- ◆ Workflow Games
- ◆ User Editable Tables
- ◆ Debugging Workflows
- ◆ Comparing Workflows
- ◆ ECM 24.1 including reporting

Audience:

- ◆ Accounts Payable
- ◆ Finance
- ◆ IT - Epicor ECM (DocStar) Administrators

Prerequisites:

- ◆ General knowledge of Epicor ECM (DocStar)



EE 8: Automating Your Business Processes with BPMs: Beginner

Program Level: Beginner

During this session you learn the basics about the Business Process Management (BPM) toolset. Use BPM to automate and control business processes in Kinetic. This toolset mainly does this through two directive types – Method Directives and Data Directives. You will explore the differences between a method directive and a data directive to understand which type can best handle your business need. You will then create both method and data directives using the BPM Workflow Designer. Through this interface you will link BPM widgets to create condition and action workflows. You then test the method and data directives to verify they carry out their automated actions.

NOTE: This session is intended for Kinetic and Senior Living users.

Cost: There is an additional \$350 AUD fee to attend this session.

Objectives:

- ◆ Understand the differences between Method and Data Directives
- ◆ Learn how to use the BPM Workflow Designer
- ◆ Create Method Directives
- ◆ Test Method Directives
- ◆ Create Data Directives
- ◆ Test Data Directives

Audience:

- ◆ System Administrators
- ◆ IT/Technical Staff

Prerequisites:

- ◆ Business Activity Queries



EE 9: Advanced Requisition Management (ARM)

Program Level: Beginner

Through this session you will learn how Advanced Requisition Management (ARM) allows Senior Living (SLS) and Kinetic customers to address the challenges of procurement management across the multiple demand streams with an integrated solution. ARM provides the ability to manage the complete procurement life cycle by combining Requisitioning and MRP generated purchase suggestions with multi-level, multi-path approval mechanisms into Kinetic Purchasing Management for an end-to-end functionality.

This session allows you to create requisitions for non-inventory items, view and process MRP created PO suggestions, track the progress of those requisitions through the approval process within ARM, review the PO in SLS or Kinetic and complete the receipting process, ultimately view the process through to Accounts Payable.

Areas that will be touched on are:

- ◆ Requisition Creation
- ◆ Multiple Requisition types
 - Standard Orders
 - Blanket Orders
 - Standing Orders
- ◆ Workflow Management
 - Single Approval Path
 - Multiple Approval Paths
- ◆ GL Based Budget Management
- ◆ Project Based Budget Management
- ◆ Receiving of PO's for non-inventory items
- ◆ Processing to AP Invoicing
- ◆ Data Management

Cost: There is an additional \$350 AUD fee to attend this session.

Objectives:

- ◆ Ability to create and approve Requisitions and Purchase Orders
- ◆ Analyze procurement budgets and approval workflows.
- ◆ Understand the interaction between ARM and SLS or Kinetic Purchasing functionality

Audience:

- ◆ Procurement Managers
- ◆ Procurement Users
- ◆ CFO
- ◆ Accountants
- ◆ Project Managers

EE 10: Real-World Techniques for Automation Studio, Powered by Workato, for Kinetic

Program Level: Beginner

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

NOTE: This session is intended for Kinetic and Senior Living users.

Cost: There is an additional \$350 AUD fee to attend this session.

Objectives:

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

Audience:

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

Prerequisites:

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

EE 11: Automating Your Business Processes with BPMs: Advanced

Program Level: Advanced

Go beyond your basic understanding of Business Process Management (BPM) during this advanced session.

You will see how to create a BPM directive that monitors data entry and sends out an email notifying specific users about record changes. This BPM directive leverages custom data you enter through user-defined codes, accesses that data using queries, and then sends out the email notification. You will also see how to create a BPM directive that interacts with a custom layer in Application Studio. Attendees who are not familiar with the BPM toolset should first take the Automating Your Business Processes with BPMs: Beginner course before taking this advanced session.

NOTE: This session is intended for Kinetic and Senior Living users.

Cost: There is an additional \$350 AUD fee to attend this session.

Objectives:

- ◆ Understand the benefits of a Service-Oriented Architecture
- ◆ Create a method directive that leverages user codes
- ◆ Use the Fill Table by Query widget to pull data from a table
- ◆ Send out an email notification when data changes on a record
- ◆ Create a layer in Application Studio
- ◆ Design a BPM directive that interacts with the Application Studio layer

Audience:

- ◆ System Administrators
- ◆ IT/Technical Staff

Prerequisites:

- ◆ Business Activity Queries
- ◆ Application Studio (Basic Understanding)
- ◆ Business Process Management (Basic Understanding)

EE 12: Utilising FP&A Advanced Reporting and Budgeting, including Understanding Business Rules with Assumptions Logic

Program Level: Advanced

This class targets existing FP&A customers currently using the system for reporting and budgeting. It is run under the assumption each user knows how to navigate and perform simple reporting and budgeting tasks, enabling each session attendee to focus on learning advanced techniques for using the system.

NOTE: This session is intended for Kinetic and Senior Living users.

Cost: There is an additional \$350 AUD fee to attend this session.

Objectives:

Epicor FP&A offers very powerful and versatile reporting and budgeting capabilities allowing users to generate accurate and up-to-date reports using its own interfaces quickly.

This session aims to:

- ◆ Showcase how to perform advanced customizations of report templates through report row section manipulation
- ◆ Showcase tricks on how to optimize report performance
- ◆ Run through the dos and don'ts of advanced report creation
- ◆ Showcase how to successfully create budget sheets from scratch and adjust it to various audience types through the budget workflow
- ◆ Discuss how to incorporate standard key measures for assumptions and how to use business rules to allocate such assumptions before budget start

Audience:

- ◆ Customers with existing, live FP&A environments set up
- ◆ Customers who have been using the system and need refreshers / new tips and tricks to get the most out of the tool

Prerequisites:

- ◆ Basic report creation experience in FP&A
- ◆ Basic budget sheet tailoring in FP&A
- ◆ XL Connect reporting experience
- ◆ Accounting knowledge