

Insights 2022 Extended Education Agenda

updated 2-16-2022

Start Time	End Time	Title	Description	Description Continued	Session Level	Theme	Product
5/22/2022 8:00	5/22/2022 12:00	EE 1: Running Your Financial Cycle in Epicor Kinetic	<p>COST: There is an additional \$275 fee to attend this session.</p> <p>If you are a finance employee this course is for you. Through this four-hour extended education session learn how the core manufacturing and cash cycle transactions interact with the general ledger (GL).</p> <p>This session will allow you to understand the GL setup and hierarchy used by the Epicor application to determine the accounts and journal codes where transactions post. Identify the main inventory, labor, accounts receivable, and accounts payable transactions and the role setup programs play in controlling where and when to post.</p> <p>OBJECTIVES: At the end of this session you will:</p> <ul style="list-style-type: none"> • Perform GL Control Code setup to leverage the transaction hierarchy capabilities of the application. • Understand the relationship between GL Transaction Types, GL Control Types, and GL Control Codes. • Comprehend the financial impact of Product Groups, Part Classes, and Departments. • Perform inventory and labor transactions to analyze the impact of the GL Control Code setup. • Complete a Cash Cycle (AR Invoice, cash receipt, AP Invoice, supplier payment) and review related GL transactions. • Identify core reports and trackers used to maintain the GL integrity. 	<p>AUDIENCE: This session will appeal to the following audience:</p> <ul style="list-style-type: none"> • CFO/Controller • Cost Accountant • AP Clerk • AR Clerk <p>PREREQUISITES: Introduction to Kinetic Course, System Flow, General Ledger, Recommended Knowledge Camp Course</p> <p>APPLICABLE PRODUCTS: This session will benefit customers running Epicor 10.x</p> <p>PROGRAM LEVEL: Intermediate</p> <p>FIELD OF STUDY: Finance</p>	Intro	Financials	Kinetic
5/22/2022 8:00	5/22/2022 12:00	EE 2: Driving System Enhancements with Application Studio Fundamentals	<p>COST: There is an additional \$275 fee to attend this session.</p> <p>When customizing your application, you use the Application Studio. This powerful new tool offers drag and drop functionality that enables you to make specific changes and 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 hide fields your company does not use, display proprietary data within your system, add sliding panels to display related data, and other features that improve your return on investment.</p>	<p>Attend this session to learn:</p> <ol style="list-style-type: none"> 1. Navigating the Application map 2. Managing Layers 3. Data bindings 4. Dropdown controls 5. Searches 6. Adding Child DataViews 7. Row Rules 8. Event Handlers 	Intro	Cloud,Digital Transformation,User Experience,Upgrade	Kinetic
5/22/2022 8:00	5/22/2022 12:00	EE 3: Creating Integrations for Your System with Rest API	<p>During this session, you will get hands-on with the Epicor REST Services and learn how you can much more quickly and easily than ever before build integrations with Epicor data in a wide variety of scenarios from connecting data to off the shelf applications like Microsoft® Excel® and PowerBI® to writing completely custom applications in the programming language of your choice. We will start from the ground up and show you how to enable the services, find and test the service calls you need, and ultimately create a simple custom application that interacts with Epicor data.</p> <p>OBJECTIVES</p> <p>Upon successful completion of this course, you will be able to:</p> <ul style="list-style-type: none"> - Explain when and why you should use Epicor REST Services - Understand how to enable Epicor REST Services in Epicor 10.1.500+ - Locate Epicor REST Service Methods and try them with interactive documentation - Test and generate sample code to call Epicor REST Services with Postman, a REST Service Testing Utility - Create simple OData Queries to filter data from REST Services - Integrate Epicor Data into OData Applications such as Microsoft Excel - Create a basic custom application that integrates Epicor Data via REST - Generate Custom REST Services from BAQ - Securing REST services - Monitoring REST Services 	<p>AUDIENCE -System Administrator -IT/Technical Staff - Software developers</p> <p>PREREQUISITES</p> <ul style="list-style-type: none"> - Understanding of Epicor navigation - Basic Familiarity with Epicor BAQ Queries - Basic Scripting / Programming Knowledge <p>APPLICABLE PRODUCTS</p> <p>This session will be of benefit to customers running Epicor 10.1.500 or later</p> <p>PROGRAM LEVEL: Intermediate</p>	Intro	BI/Analytics/Reporting, Digital Transformation, Tools and Technology	Kinetic

Insights 2022 Extended Education Agenda

updated 2-16-2022

Start Time	End Time	Title	Description	Description Continued	Session Level	Theme	Product
5/22/2022 8:00	5/22/2022 12:00	EE 4: Lab: Running Your Inventory Cycle in Epicor Kinetic	<p>COST: There is an additional \$275 fee to attend this session.</p> <p>Through this four-hour extended education, session learn how to perform inventory transactions to update and maintain raw materials, work in process as well as finished goods inventory quantities and costs.</p> <p>This session will allow you to identify part inventory data fields, track the movement of parts throughout the Epicor ERP application and analyze various inventory reports. You will also learn how to set up and perform a cycle count.</p> <p>OBJECTIVES: At the end of this session you will:</p> <ul style="list-style-type: none"> • Identify setup programs that govern Inventory Management processing. • Identify important inventory data fields from Part Maintenance. • Perform inventory transactions such as quantity adjustments, purchase receipts, job material issuance, material returns, transfers, and order shipments. • Configure and process a cycle count to maintain accurate inventory counts. • Describe what inventory reporting options are available in Kinetic. 	<p>AUDIENCE: This session will appeal to the following audience:</p> <ul style="list-style-type: none"> • Shipping and Receiving • Material Handler • Production Manager <p>PREREQUISITES: Introduction to Epicor ERP Course, System Flow Course, Recommended Knowledge Camp Course</p> <p>APPLICABLE PRODUCTS: This session will benefit customers running any Epicor system.</p> <p>PROGRAM LEVEL: Beginner</p> <p>FIELD OF STUDY: Manufacturing/Supply Chain</p>	Intro	Supply Chain	Kinetic
5/22/2022 8:00	5/22/2022 12:00	EE 5: Ensuring Data Integrity with Queries and BPM Directives	<p>Do you want to ensure that your customers always have the information they need when they need it instead of someone missing a manual step? Do you want to have your Epicor system alert the right people when inventory levels are too low instead of someone discovering that there isn't enough stock to fulfil an important order when it might be too late? Do you want to ensure that "that process" some end users have challenges completing according to your business needs is always completed perfectly instead of not being able to trust the information is correct?</p> <p>This session will focus on demonstrating how to use the robust Epicor Business Process Management (BPM) framework to accomplish these types of tasks and more.</p> <p>OBJECTIVES:</p> <ul style="list-style-type: none"> • Understand the Epicor BPM framework and the system activities that can be used with BPMs (and when one BPM type may be a better option over another). • Use client tracing to design and build process automation for inventory adjustment and label printing using a data directive BPM. • Use UserCodes to store values used by your custom processes to assign sequential codes and number. • Use the BPM Update Table by Query to update the email notify value on the order head table from the customer contact table using custom business logic. • Add an authorization process for new customers using alert attachments. 	<p>AUDIENCE - IT/Technical Staff - Epicor administrators</p> <p>APPLICABLE PRODUCTS: - Epicor Cloud - Epicor on-premise</p> <p>PROGRAM LEVEL: Intermediate</p> <p>PREREQUISITES: A foundational understanding of:</p> <ul style="list-style-type: none"> - Reviewing business requirements and establishing data scenarios - Constructing a BAQ with business logic to detect specific data conditions - Using workflow elements to construct a Dynamic Query call to your BAQ and evaluate the return values - Testing and debugging your BPM components - Moving re-usable business logic from the BPM into an Epicor Function - Calling the function using REST 	Advanced	Digital Transformation, Tools and Technology, User Experience	Kinetic
5/22/2022 8:00	5/22/2022 12:00	EE 6: Understanding and Troubleshooting Epicor MRP and Scheduling	<p>MRP is a complex process and there may be times when you run into issues of some kind. This session is designed to introduce the primary functions of the Material Requirements Planning (MRP) module. During this session you will review some issues that may occur with the MRP process during different stages of an MRP run and learn how to resolve them.</p> <p>Objectives</p> <p>Upon successful completion of this session, you will be able to:</p> <ul style="list-style-type: none"> • Identify factors that affect material requirements planning performance. • Understand Internet Information Service (IIS) and the implications on MRP. • Process MRP using different scenarios. • Create Dashboards to achieve different MRP troubleshooting objectives. • Review system task parameters. • Understand the MRP background processing logic. • Review the results of a corresponding MRP run. • Understand the difference between the Net Change and Regenerative MRP runs. 	<p>AUDIENCE: This session will appeal to the following audiences:</p> <ul style="list-style-type: none"> • Production Controller • Material Planner • Operations Manager • Scheduler • Engineers <p>PREREQUISITES: Required courses: Navigation Inventory, Engineering, Job Management</p> <p>APPLICABLE PRODUCTS: This session will be of benefit to customers running any Epicor system version.</p> <p>PROGRAM LEVEL: Basic</p>	Intro	Production, Supply Chain	Kinetic

Insights 2022 Extended Education Agenda

updated 2-16-2022

Start Time	End Time	Title	Description	Description Continued	Session Level	Theme	Product
5/22/2022 8:00	5/22/2022 12:00	EE 8: Data at Your Fingertips: Customizing Standard SSRS Reports	<p>COST: There is an additional \$275 fee to attend this session.</p> <p>This session introduces Microsoft SQL Server Reporting Services (SSRS) reports and their implementation in your Epicor system. Microsoft SSRS is a server-based reporting platform that provides comprehensive reporting functionality to generate reports from SQL Server databases.</p> <p>To create the custom reports, the first workshops use Microsoft SQL Server Report Builder, a report authoring tool. Report Builder utilizes a Microsoft Office style environment, so its familiar interface makes it ideal for developing most custom reports.</p> <p>OBJECTIVES: Upon successful completion of this course, you will be able to:</p> <ul style="list-style-type: none"> •Imbed images that are included in standard reports without the need for editing the SSRS reports •Use the NEW Cloud friendly 'Generate for Design' feature to edit SSRS reports without requiring a local download •Use the SSRS Report Builder to edit standard Epicor SSRS reports and custom SSRS reports •Add custom SSRS reports within your Epicor system's menu and display them during runtime 	<p>AUDIENCE: Specific audiences will benefit from this course:</p> <ul style="list-style-type: none"> •System Administrator •IT/Technical Staff •Report Writers •Business Analysts <p>PREREQUISITES:</p> <ul style="list-style-type: none"> •Understanding of the Epicor's interface •Knowledge of report authoring programs •Knowledge of relational database concepts such as table relationships, records, and field types •Understanding of business activity query (BAQ) functionality <p>PROGRAM LEVEL: Intermediate/Advanced</p>	Advanced	Tools and Technology, User Experience	Kinetic
5/22/2022 8:00	5/22/2022 12:00	EE 9: Epicor Dashboards the Basics and Beyond	<p>COST: There is an additional \$275 fee to attend this session.</p> <p>This extended education session is ideal for Power Users who have a need for greater visibility of Epicor data. Dashboards are the primary tool to display the output of queries in a menu-accessible format. Their ability to show related data in multiple panels and to offer the user parameters to rearrange and organize the data makes them more flexible than the conventional report.</p>	<p>This session will leave you well equipped to build a basic dashboard to display relevant data to your position and provide parameters for selecting subsets of that data.</p> <ul style="list-style-type: none"> •Explain the general purpose and functionality of dashboards •Create a new dashboard using existing queries •Add images to a new column in the current grid •Add an advanced search with a range for searching for multiple records •Add a Dashboard Browse to the dashboard •Add multiple sheets with grids to the dashboard •Create foreign key and sub table views to interrelate information on the dashboard •Build and deploy dashboards to the Main menu and Favorites bar •Utilize properties within the elements of the dashboard to optimize the display •Add visualize components •Group, summarize and/or filter data in the data grid 	Intro	Digital Transformation, Tools and Technology, User Experience	Kinetic

Insights 2022 Extended Education Agenda

updated 2-16-2022

Start Time	End Time	Title	Description	Description Continued	Session Level	Theme	Product
5/22/2022 13:00	5/22/2022 17:00	EE 10: Processing and Tracking Your Job Costs in Manufacturing	<p>COST: There is an additional \$275 fee to attend this session.</p> <p>The purpose of this session is to help you understand how your Epicor system processes job costs. As the job moves through the system, it examines the components and calculations the application uses to create estimated costs; actuals are then accrued through the manufacturing process. The session describes the job process, evaluates where job estimates are established, and then demonstrates how actual costing data is accumulated through methods of manufacturing to arrive at the final costs for each job record.</p>	<p>At the conclusion of this lab, you will be able to:</p> <ul style="list-style-type: none"> • Comprehend the flow of a job through the manufacturing process. • Identify the costing components and calculations used in a method of manufacturing. • Demonstrate the impact of material issue and labor transactions on job costing. • Explain how costing data is accumulated to determine the final cost on each job record. • Describe the impact of material receipts on job and inventory costing. • Monitor costs using the Production Detail, Work in Progress and WIP/Inventory Reconciliation reports through the entire production-to-inventory cycle. <p>AUDIENCE: This session will appeal to the following audience:</p> <ul style="list-style-type: none"> • Cost Accountant • CFO/Controller • Engineer • Job Planners <p>PREREQUISITES: Navigation, System flow, Job management,</p>	Intro	Financials	Kinetic
5/22/2022 13:00	5/22/2022 17:00	EE 11: Expanding System Enhancements with Advanced Application Studio	<p>COST: There is an additional \$275 fee to attend this session.</p> <p>Application Studio Part II will cover more advanced use cases for customizing your Epicor system. We will explore leveraging the new Application Studio toolset to incorporate data from other services into new change layers to create an enhanced user experience.</p>	<p>Objectives</p> <ul style="list-style-type: none"> • Build Dashboards with updatable BAQ's • Calling service methods passing parameters • Calling Functions passing parameters • Calling methods and or functions from event handlers • Working with Type Script for more advanced custom processing <p>Prerequisites</p> <ul style="list-style-type: none"> • Business Activity Queries • Business Process Management 	Advanced	Cloud,Digital Transformation,User Experience,Upgrade	Kinetic
5/22/2022 13:00	5/22/2022 17:00	EE 13: Planning and Processing Jobs with Material Requirements Planning (MRP)	<p>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.</p> <p>OBJECTIVES: Upon successful completion of this session, you will be able to:</p> <ul style="list-style-type: none"> • 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. 	<p>AUDIENCE: This session will appeal to the following audience:</p> <ul style="list-style-type: none"> • COO/Operations Manager • Scheduler • Shipping and Receiving • Production Manager • Purchasing Staff/Buyer <p>PREREQUISITES:</p> <ul style="list-style-type: none"> •Epicor system navigation skills. • Job Management embedded education course. <p>APPLICABLE PRODUCTS: This course will be of benefit to customers running any Epicor system.</p>	Intro	Production	Kinetic

Insights 2022 Extended Education Agenda

updated 2-16-2022

Start Time	End Time	Title	Description	Description Continued	Session Level	Theme	Product
5/22/2022 13:00	5/22/2022 17:00	EE 14: Enhance Control of Business Processes with Epicor Functions	<p>COST: There is an additional \$275 fee to attend this session.</p> <p>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....)</p> <p>Objectives</p> <ul style="list-style-type: none"> * 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. 	<p>PREREQUISITES - Basic Epicor navigation</p> <p>Business Process Management class or some level of experience building method and data directives</p> <p>Advanced Preparation -Review method and data directives workflow designer.</p>	Advanced	Digital Transformation, Tools and Technology, User Experience	Kinetic
5/22/2022 13:00	5/22/2022 17:00	EE 15: Create and Complete All Types of Manufacturing Jobs with Epicor Kinetic Job Management	<p>COST: There is an additional \$275 fee to attend this session.</p> <p>This business-case-focused session will take you through the main stages of Epicor Job Management. You will understand the different types of demand and the resulting job demand link types. You will gain command of key features from setup requirements to subcontract operations, from constrained materials to backflushed ones. As you progress through the completion of a job you'll get insights into best practices with checks and balances available to you to make sure you are right on target with dollars and time spent. You'll look into the basics of quality management by completing an inspection operation and finally receive or ship items.</p> <p>At the conclusion of this lab, you will be able to:</p> <ul style="list-style-type: none"> • Explain the different sources of demand that leads to job creation • List and demonstrate the key methods for job creation • Complete jobs operations on target, internal and subcontract alike. • Understand the benefits of backflushing operations and materials. • Execute an inspection and report scrap, non-conformance. • Complete the movement of finished products at job completion. • Finalize and Analyze Jobs using Job Closing Maintenance, capture and post costs to the General Ledger. 	<p>AUDIENCE:</p> <p>This session will appeal to the following audience:</p> <ul style="list-style-type: none"> • Plant Managers • Planners and Schedulers • Production Team Leads • Controllers and Cost Accountants • Business Analysts and Epicor system Support Personnel <p>PREREQUISITES</p> <p>Navigation, System flow</p> <p>PROGRAM LEVEL: Intermediate</p>	Intro	Production	Kinetic

Insights 2022 Extended Education Agenda

updated 2-16-2022

Start Time	End Time	Title	Description	Description Continued	Session Level	Theme	Product
5/23/2022 8:00	5/23/2022 12:00	EE 16: Managing Reports and Communications Using Advanced Print Routing	<p>COST: There is an additional \$275 fee to attend this session.</p> <p>Do you want to ensure that your customers always have the information they need when they need it instead of someone missing a manual step? Do you want to have your Epicor system alert the right people when inventory levels are too low instead of someone discovering that there isn't enough stock to fulfil an important order when it might be too late? Do you want to ensure that "that process" some end users have challenges completing according to your business needs is always completed perfectly instead of not being able to trust the information is correct?</p> <p>This session will focus on demonstrating how to use the robust Epicor Business Process Management (BPM) framework to accomplish these types of tasks and more.</p>	<p>OBJECTIVES: 0Upon successful completion of this course, you will be able to:</p> <ul style="list-style-type: none"> • Understand the Epicor BPM framework and the system activities that can be used with BPMs (and when one BPM type may be a better option over another). • Use client tracing to design and build process automation for inventory adjustment and label printing using a data directive BPM. • Use UserCodes to store values used by your custom processes to assign sequential codes and number. • Use the BPM Update Table by Query to update the email notify value on the order head table from the customer contact table using custom business logic. • Add an authorization process for new customers using alert attachments. <p>AUDIENCE - This session will appeal to the following audience: - IT/Technical Staff - Epicor administrators</p> <p>APPLICABLE PRODUCTS: - Epicor Cloud - Epicor on-premise</p> <p>PREREQUISITES PROGRAM LEVEL: Intermediate</p> <p>A foundational understanding of - Reviewing business requirements and establishing data scenarios</p> <p>- Constructing a BAQ with business logic to detect specific data conditions- Using workflow elements to construct a Dynamic Query call to your BAQ and evaluate the return values</p> <p>- Testing and debugging your BPM components- Moving re-</p>	Advanced	Tools and Technology, User Experience, Digital Transformation	Kinetic
5/22/2022 13:00	5/22/2022 17:00	EE 17: Extend Your SSRS Development with Multiple Interacting Business Activity Queries (BAQs)	<p>COST: There is an additional \$275 fee to attend this session.</p> <p>This course will provide you with the opportunity to create complex Report Data Definitions via multiple interacting BAQs.</p> <p>OBJECTIVES - Upon successful completion of this course, you will be able to:</p> <ul style="list-style-type: none"> - Create a custom Report Data Definition (RDD) from multiple BAQs. - Pass multiple parameters to your newly created Report. - Create Sub Reports in SSRS. - Add your newly created BAQ reports to your Epicor sytem menu and display them during runtime. - Use Microsoft SQL Server Data Tools (SSDT) to visualize Multiple SSRS RDL objects at the same time. - Use Microsoft SQL Server Management Studio (SSMS) to write SSRS Report queries based off of multiple BAQ Queries. 	<p>AUDIENCE: Specific audiences will benefit from this course:</p> <ul style="list-style-type: none"> - DBA - SQL Developer - Report Writer/Developer with strong SQL Background - IT/Technical Staff with strong SQL Background <p>PREREQUISITES - For this course, the following is recommended:</p> <ul style="list-style-type: none"> - Understanding of Application Studio - Knowledge of SSRS, Crystal Reports, Basic Programming, Advanced SQL report authoring programs - Knowledge of relational database concepts such as table structure, datatypes, schemas, views, and table relationships - Understanding of business activity query (BAQ) 	Advanced	Tools and Technology, User Experience	Kinetic

Insights 2022 Extended Education Agenda

updated 2-16-2022

Start Time	End Time	Title	Description	Description Continued	Session Level	Theme	Product
5/22/2022 13:00	5/22/2022 17:00	EE 18: Gain Hands-on Experience Integrating EDI Into Your Business Processes	<p>COST: There is an additional \$275 fee to attend this session.</p> <p>In this course, you'll develop a strong foundational knowledge in EDI including how to read, interrupt, and map EDI data structures while also learning the impact EDI has in driving supply chain automation and organizational efficiencies in your business. Also as part of this course, you'll gain hands-on experience integrating EDI documents into and out of Epicor.</p> <p>OBJECTIVES: Upon successful completion of this course, you will: Understand the Basics of EDI - What types of companies exchange via EDI, what is the value of EDI and electronic communication, what are some of the common industry terms and what they mean for your business, etc. -Have a Solid Introductory Technical Foundation into EDI 101 and 201 -This will include a review of the EDI standards (X12, EDIFACT), types of EDI document conversations per industry, reading and interrupting EDI data structure, etc. - Understand the Common Industry EDI Delivery & Support Models - Manual web form solution, integrated software, managed services, business user document visibility, supply chain enablement - Understand the Value of Document Visibility and Data Insights for Your Business Users - How do the business users of the organization (supply chain, accounting, finance, customer support) view and gain insights from trading partners EDI documents - Hands on Lab to Set Up a New EDI Trading Partner - Use 1 EDI Source's solution to demonstrate the required components to set up a new trading partner connection -Hands on Lab for EDI Integration - Use 1 EDI Source's solution to demonstrate and develop an integration into / out of your</p>	<p>AUDIENCE: Specific audiences will benefit from this course.</p> <ul style="list-style-type: none"> •EDI Specialist •System Administrator •IT/Technical Staff <p>PREREQUISITES:</p> <ul style="list-style-type: none"> •General Technical Competency <p>PROGRAM LEVEL: Beginner/Intermediate</p> <p>FIELD OF STUDY: Information Technology</p>	Intro	Digital Transformation, Tools and Technology, Supply Chain	Kinetic; #EDI
5/23/2022 8:00	5/23/2022 12:00	EE 19: Leverage Multi-Company Functionality in Epicor Kinetic	<p>Through this four-hour, extended education session learn The Multi-Site Management module contains a wide range of processes that your large organization can leverage to improve the flow of data between parent and subsidiary companies. You can use this module to create global records, ensuring a uniform set of data is available within all your companies. You can set up central payments and consolidated purchases to coordinate these processes throughout the organization. Each company can also contain multiple financial books, and the multi-company consolidation process can combine the financial results for each period into a target book in a parent company. The Multi-Site functionality encompasses all the features which share data across different areas within your organization. You will implement this functionality to match the internal structure and needs of your organization. Leverage these features to share global master records like customers, parts, and suppliers, coordinate purchasing between your divisions, consolidate financial data, and other internal data sharing activities. Implement the features that you need to better coordinate the diverse activities of your entire organization.</p>	<p>OBJECTIVES: At the end of this session, you will: Update Global Tables, Maintain Multi-Company GL Accounts, Assign a Journal Code to a GL Control, Configure Central Payment/Collection</p> <p>AUDIENCE: This session will appeal to the following audience: CFO/Controller, AP Clerk, AR Clerk</p> <p>PREREQUISITES: Agendas or courses you recommend they take prior to this course.</p> <ul style="list-style-type: none"> •Accounts Payable/Accounts Receivable •Consolidated Payment/Consolidated Purchasing •General Ledger/ Inventory Management •Multi-Currency/ Multi-Site GL Journals •Multi-Site Management/ Multi-Site Publish •Multiple Warehouse / Order Management •Purchase Management/ Shipping Receiving <p>PROGRAM LEVEL: Beginner/Intermediate</p>	Intro	Financials	Kinetic
5/23/2022 8:00	5/23/2022 12:00	EE 20: Driving System Enhancements with Application Studio Fundamentals	<p>COST: There is an additional \$275 fee to attend this session.</p> <p>When customizing your application, you use the Application Studio. This powerful new tool offers drag and drop functionality that enables you to make specific changes and 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 hide fields your company does not use, display proprietary data within your system, add sliding panels to display related data, and other features that improve your return on investment.</p>	<p>Attend this session to learn:</p> <ol style="list-style-type: none"> 1. Navigating the Application map 2. Managing Layers 3. Data bindings 4. Dropdown controls 5. Searches 6. Adding Child DataViews 7. Row Rules 8. Event Handlers 	Intro	Cloud, Digital Transformation, User Experience, Upgrade	Kinetic

Insights 2022 Extended Education Agenda

updated 2-16-2022

Start Time	End Time	Title	Description	Description Continued	Session Level	Theme	Product
5/23/2022 8:00	5/23/2022 12:00	EE 21: Introduction to Epicor APR Enhanced (Includes Epicor ECM, the new name for DocStar) and ECM Document Attach Connector for Epicor Kinetic	<p>COST: There is an additional \$275 fee to attend this session.</p> <p>In this four-hour, hands-on course, you will learn how Epicor ECM combines with Kinetic Advanced Printing and Routing (APR) to become APR Enhanced and how content imported into Epicor ECM is integrated with Kinetic. This course shows you how to attach documents via Epicor ECM into a record residing in Kinetic. Through importing the document into Epicor ECM, the document will flow through a workflow to recognize the part record in Kinetic and ultimately attach the document to the record while keeping it stored in the ECM system.</p> <p>AUDIENCE: This session will appeal to the following audience: IT, Accounts Payable, Mfg. Operations, Sales Operations</p> <p>OBJECTIVES: Upon successful completion of this course you will: Know how to create attachment type - Know how to create document type - Know how to create document type control - Know how to create report style - Know how to create SSRS breaking/routing - Understand how the ECM system communicates effectively to the ERP system handling documents - Understand the automation around document attach between the two systems</p>	<p>PREREQUISITES This class is open to both Epicor ECM customers and prospects who are interested in the solution. While not a requirement, we recommend that prior to attending the class, you familiarize yourself with Enterprise Content Management concepts by taking as many of these short online video courses as you can, in the following order, in the ECM* section on the Epicor Learning Center (https://erpcustomer.epicor.com/lms/public/initchoose):</p> <p>*If you cannot access the ECM online courses on the Epicor Learning Center, please send an email to epicweb@epicor.com</p> <p>Highly Recommended Online Courses:</p> <p>Datalink (56 minutes)</p> <p>Additional Recommended Online Courses:</p> <p>Importing Files (17 minutes)</p> <p>Scanning (23 minutes)</p> <p>Batch Import (9 minutes)</p> <p>Document Management (48 minutes)</p> <p>Versioning (16 minutes)</p> <p>APPLICABLE PRODUCTS: This session will be of benefit to Kinetic customers running or interested in acquiring Advanced Printing and Routing (APR) Enhanced (which includes Epicor ECM, the new name for DocStar), ECM Workflow, and the ECM Document Attach Connector for Kinetic (which can be purchased separately, otherwise included with ECM AP Automation or ECM Sales Order</p>	Intro	Cloud,Digital Transformation,User Experience	ECM;#Kinetic
5/23/2022 8:00	5/23/2022 12:00	EE 22: Lab: Tracking Inventory Detail Accurately with Advanced Unit of Measure	<p>COST: There is an additional \$275 fee to attend this session.</p> <p>Through this four-hour extended education session learn how to use Advanced Unit of Measure to define and use different dimensions (attribute sets) for the same part and then reuse those attribute sets depending on the dimension you want to quote, order, purchase, manufacture, ship, receive, transfer, quantity adjust, and so on. Advanced Unit of Measure provided the ability to most accurately cost and forecast dimensional inventory while easing the pain of quickly locating the right inventory to meet the needs of the customer or production. Learn how to manually enter dynamic attribute sets that hold a part's dimension criteria and then generate them using the application. Complete critical inventory processes like purchasing and receiving, quoting, sales and shipping using multiple attribute sets and review the impact these processes have on your inventory levels.</p>	<p>OBJECTIVES: At the end of this session you will:</p> <ul style="list-style-type: none"> Manually enter dynamic attribute sets that hold part's dimension criteria and generate them using the application. Define a specific conversion calculation and apply it between the UOMs in different UOM Classes. Specify/hold/see/use, as actual inventory, different UOMs in the same warehouse bin where these different UOMs might also consist of other attributes that further differentiate the inventory. Complete the purchase and receiving processes using multiple attribute sets and review the impact these processes have on your inventory levels. Complete the quote, sales, and shipping processes using multiple attribute sets and review the impact on your inventory levels again. <p>AUDIENCE: This session will appeal to the following audience:</p> <ul style="list-style-type: none"> Inventory Manager 	Intro	Supply Chain,Production,Sales/Services,Procurement	Kinetic

Insights 2022 Extended Education Agenda

updated 2-16-2022

Start Time	End Time	Title	Description	Description Continued	Session Level	Theme	Product
5/23/2022 8:00	5/23/2022 12:00	EE 23: Creating Advanced Business Queries (BAQs) for Better Data Management	<p>COST: There is an additional \$275 fee to attend this session.</p> <p>The Advanced Queries class covers technical features that go beyond building simple queries in Epicor Kinetic. Create Intercept and Except queries that determine differences between two sets of data. Examine using subqueries for selecting records. Aggregating data into row and column matrices is explored using the Advanced Group By and PIVOT features. See how you generate hierarchical data using a Common Table Expression (CTE) subquery with recursion. Then look at data from outside Epicor Kinetic by creating an External Business Activity Query. The course is designed for those with some BAQ familiarity who want to take their knowledge to the next level.</p> <p>OBJECTIVES: Upon successful completion of this session, you will be able to:</p> <ul style="list-style-type: none"> -Create an except business activity query -Create an intercept business activity query -Create a subquery that selects records -Create a query that uses an Advanced Group By clause -Understand how to use PIVOT table functionality in BAQs -Use the Common Table Expression to display hierarchal data -Create an external business activity query to reference data outside of Epicor Kinetic 	<p>AUDIENCE This session will appeal to the following audience:</p> <ul style="list-style-type: none"> -System Administrator -IT/Technical Staff <p>PREREQUISITES Required Courses: Navigation, Business Activity Queries (BAQs)</p> <p>APPLICABLE PRODUCTS This session will be of benefit to customers running Epicor 10.x</p> <p>PROGRAM LEVEL: Intermediate</p>	Advanced	Tools and Technology, User Experience	Kinetic
5/23/2022 8:00	5/23/2022 12:00	EE 24: Customize your Reporting with Drillable Data in Excel using Spreadsheet Server	<p>COST: There is an additional \$275 fee to attend this session.</p> <p>Generic-templated reports provide a great starting place, but most businesses need customized reports to be able to put data into context and make it easier to connect to meaningful insights. In this session, Spreadsheet Server product experts will show you how you can customize and automate data in Excel to create custom reports to meet your specific business needs.</p> <p>OBJECTIVES: At the end of this session, you will:</p> <ul style="list-style-type: none"> •Build comprehensive reports without relying on IT •Learn how to report on financial and operational data •Become familiar with Query Designer •Build automated distribution of Spreadsheet Server reports 	<p>AUDIENCE: This session will appeal to the following audience:</p> <ul style="list-style-type: none"> •Everyone who needs to report on data <p>PREREQUISITES: none</p> <p>PROGRAM LEVEL: All levels – (Beginner/Intermediate/Advanced)</p>	Intro	Financials, BI/Analytics/Reporting	Kinetic
5/23/2022 8:00	5/23/2022 17:00	EE 25: Deep Dive into Inventory, Purchasing Methods, PORG, and Forecasting, Part 1 and Part 2	<p>COST: There is an additional \$550 fee to attend this session.</p> <p>Don't have a degree in purchasing or inventory control. You look at requirements reports, but don't know how the numbers were calculated. This course is for you. In this two-part course, we'll dive into basic and advanced inventory theory. Help answer the questions of why did Prophet 21 suggest that quantity to purchase, and how can I provide the highest level of customer service at the lowest overall cost.</p> <p>This course is taught over two sessions and you are automatically signed up for both sessions.</p>	<p>OBJECTIVES At the conclusion of this course, you will be able to:</p> <ul style="list-style-type: none"> •Understand the importance and objectives of inventory management •Learn about the two fixed control and the two variable purchasing methods •See how to calculate order point and order quantity for each purchasing method •Use PO Requirements Generation (PORG) to speed up and automate purchasing •Gain an understanding of Advanced Demand Forecasting concepts and Demand Requirements Planning <p>AUDIENCE This session will appeal to the following audience:</p> <ul style="list-style-type: none"> •Purchasing and Inventory Managers and professionals 	Intro	Procurement, Supply Chain	Prophet 21

Insights 2022 Extended Education Agenda

updated 2-16-2022

Start Time	End Time	Title	Description	Description Continued	Session Level	Theme	Product
5/23/2022 8:00	5/23/2022 12:00	EE 26: Deep Dive into Epicor CPQ	<p>Are you interested in learning more about customer, pricing, and quotes (CPQ) software? Or looking to get started in Epicor CPQ? This course is ideal for those who are new to CPQ. In this session, you will learn the basics of user administration as you create users, assign roles, and control permissions. This course provides detail on how to create a user interface (UI) for your configurator and store data in tables to connect to the configurator. In addition, learn snap code and add a 3D scene to your configurator with realistic appearances.</p> <p>OBJECTIVES: At the end of this session, you will:</p> <ul style="list-style-type: none"> • Define how to use the Epicor CPQ System • Create a user interface (UI) for your configurator • Store data in tables and utilize option filters • Utilize simple snap code: the drag and drop visual language of Epicor CPQ • Learn the basics of 2D and 3D visualization 	<p>AUDIENCE: This session will appeal to the following audience:</p> <ul style="list-style-type: none"> • 3D Scene Designer • Configuration Engineer • System Admin <p>PREREQUISITES: N/A</p> <p>PROGRAM LEVEL: Beginner</p>	Intro	Cloud,Sales/Services,User Experience	Kinetic
5/23/2022 13:00	5/23/2022 17:00	EE 27: Understanding Pricing - How Did My Product Get that Price?	<p>Being a successful and profitable company is the ultimate goal of any organization. To do this, you set a pricing structure using sell matrices that allow you to be as profitable as possible without losing customers to your competition. Because there are so many combinations used for matrices, it is common for multiple matrixes to qualify to calculate the price charged to the customer. Well, how do you know where this price comes from? That is what this course is all about.</p> <p>OBJECTIVES</p> <p>Upon successful completion of this course, you will be able to:</p> <ul style="list-style-type: none"> • Understand the Pricing Hierarchy to know which matrix is used on the order • Describe using a Quote matrix for an order • Determine how to use Velocity Pricing to calculate prices based on ranks • Investigate Rebate pricing used in a Sales Order 	<p>AUDIENCE</p> <p>This course will appeal to the following audience:</p> <ul style="list-style-type: none"> • Anyone responsible for managing price sheets or pricing on orders • Anyone who creates or analyzes orders in Sales Order Entry <p>PREREQUISITES</p> <ul style="list-style-type: none"> • Basic knowledge of Eclipse Pricing including the ability to understand the concepts of Price Lines, Sell Groups, Customer Price Classes, and the Sell Matrix • Basic understanding of the matrix types, X-axis and Y-axis as well as how to create sell matrices 	Intro	Sales/Services	Eclipse
5/23/2022 13:00	5/23/2022 17:00	EE 28: Streamline Your Project Accounting with Advanced Project Management	<p>COST: There is an additional \$275 fee to attend this session.</p> <p>Through this four-hour extended education session learn how Advanced Project Management allows Epicor customers to address the challenges of contract management and multifaceted projects with an integrated solution. Advanced Project Management provides the ability to manage the complete project contract life cycle by combining project/contract accounting, contract management, and sub-contract management into the Epicor Project Management for an end-to-end functionality.</p> <p>This session will allow you to create Projects linked to a contract and Subcontracts with the ability to perform project and accounting cost and revenue analysis by using</p> <ul style="list-style-type: none"> •Multiple billing types under one contract <ul style="list-style-type: none"> oFixed Price (Lump Sum, Progress, Milestone) oSchedule of Rates (Time, Expense, Material, On-charge, Delivery-based, UOM) oRecurring (Subscription, Rental, Maintenance)Rates Management •Claims Process •Project / Contract Variation Management •Project Accounting <ul style="list-style-type: none"> oProject Ledger oProject Accruals (Revenue Recognition) •Sub-Contract Management / Retentions •Budgets – by Cost Code and Time Period •Tendering Process / Bid Management •Reporting 	<p>AUDIENCE: This session will appeal to the following audience:</p> <ul style="list-style-type: none"> •Project Manager •Project Users •CFO •Accountants <p>PREREQUISITES: Agendas or courses you recommend they take prior to this course. For example, any ELC courses or agendas.</p> <p>PROGRAM LEVEL: Beginner/Intermediate/Advanced</p>	Intro	Financials	Kinetic

Insights 2022 Extended Education Agenda

updated 2-16-2022

Start Time	End Time	Title	Description	Description Continued	Session Level	Theme	Product
5/23/2022 13:00	5/23/2022 17:00	EE 29: Expanding System Enhancements with Advanced Application Studio	<p>Application Studio Part II will cover more advanced use cases for customizing your Epicor system. We will explore leveraging the new Application Studio toolset to incorporate data from other services into new change layers to create an enhanced user experience.</p> <p>Objectives</p> <ul style="list-style-type: none"> • Build Dashboards with updatable BAQ's • Calling service methods passing parameters • Calling Functions passing parameters • Calling methods and or functions from event handlers • Working with Type Script for more advanced custom processing 	<p>Prerequisites</p> <ul style="list-style-type: none"> • Business Activity Queries • Business Process Management • Embedded Customization 	Advanced	Cloud,Digital Transformation,Upgrade ,User Experience	Kinetic
5/23/2022 13:00	5/23/2022 17:00	EE 30: Epicor ECM (DocStar) Advanced Workflow Design	<p>COST: There is an additional \$275 fee to attend this session.</p> <p>Epicor ECM (formerly known as DocStar) is better known among Kinetic (formerly known as ERP) customers for its AP Automation and Sales Order Automation workflow modules. But did you know you can build your own custom workflows for other areas of your company's operations, such as for simple check-in/check-out of Engineering drawings with approvals? In this four-hour, hands-on course, you will learn how to design business workflows with approvals.</p> <p>OBJECTIVES: Upon successful completion of this course you will:</p> <ul style="list-style-type: none"> •Know how to configure Workflow •Understand Workflow design concepts and best practices •Build simple indexing and storage workflows •Add OCR recognition to your workflows •Build conditional branching workflows •Add approval requests to your workflow •Build a workflow using DataLinks to other applications/data sources in your environment 	<p>AUDIENCE: This session will appeal to the following audience:</p> <ul style="list-style-type: none"> •IT •Accounts Payable •Mfg. Operations •Sales Operations <p>PREREQUISITES: This class is open to Epicor ECM customers. While not a requirement, we recommend that prior to attending the class, you familiarize yourself with Epicor ECM Workflow concepts by taking as many of these short online video courses as you can, in the following order, in the ECM* section on the Epicor Learning Center (https://epicustomer.epicor.com/lms/public/initchoose):</p> <p>*If you cannot access the ECM online courses on the Epicor Learning Center, please send an email to epicweb@epicor.com</p> <p>Highly Recommended Online Courses:</p> <p>Workflow Essentials (42 minutes)</p> <p>Approvals (10 minutes)</p> <p>Workflow Design (1.5 hours)</p> <p>Advanced Workflow Tasks and Mechanics (33 minutes)</p> <p>Datalink (56 minutes)</p> <p>APPLICABLE PRODUCTS: This session will be of benefit to Kinetic customers running Epicor ECM (the new name for</p>	Advanced	Cloud,Digital Transformation,User Experience	ECM;#Kinetic
5/23/2022 13:00	5/23/2022 17:00	EE 31: Leverage Epicor Data Discovery to Analyze Your Business	<p>COST: There is an additional \$275 fee to attend this session.</p> <p>This session will allow you to use business intelligence tool, Epicor Data Discovery, to follow changes to your business data as they occur in your Kinetic application.</p>	<p>Upon successful completion of this course, you will be able to:</p> <ul style="list-style-type: none"> •Launch the Epicor Data Discovery Application. •Describe the function of various Epicor Data Discovery home page options. •Create an Epicor Data Discovery View using a system BAQ as a datasource. •Define and distinguish between data measures and dimensions. •Define and distinguish between the data discovery elements •Add an Epicor DataDiscovery View to the Kinetic 	Intro	Digital Transformation,BI/Analytics/Reporting,User Experience	Kinetic

Insights 2022 Extended Education Agenda

updated 2-16-2022

Start Time	End Time	Title	Description	Description Continued	Session Level	Theme	Product
5/23/2022 13:00	5/23/2022 17:00	EE 32: Mastering Your Business Processes with Advanced BPM and Functions	Advanced BPM techniques coupled with Epicor Functions now provide the most robust customization and configuration tools in the Epicor system product offering yet. The combination of these tools now provides the same advanced capabilities to all customers that may have previously required building external assemblies only supported in on-premise installations. Functions now leverage the BPM workflow designer functionality to build method independent business logic that can be called from BPM's. Custom code actions are supported and encapsulated inside the functions eliminating the need to build external assemblies. This class will focus on creating functions to implement required business logic relevant to the challenges of today. You will build BPM's that evaluate data conditions based on data driven parameters and execute the corresponding business logic using only a handful of C# expressions that are supported regardless of the customers hosting model. This class will focus on creating functions to implement required business logic relevant to the challenges of today. You will build BPM's that evaluate data conditions based on data driven parameters and execute the corresponding business logic using only a handful of C# expressions that are supported regardless of the customers hosting model.	Objectives <ul style="list-style-type: none"> * Review business requirements and establish data scenarios. * Construct a BAQ with business logic to detect specific data conditions. * Use workflow elements to construct a Dynamic Query call to your BAQ and evaluate the return values. * Test and debug your BPM components. * Move re-usable business logic from the BPM into an Epicor Function. * Call the function from a UI customization. * Call the function using REST. Prerequisites Business Activity Queries Business Process Management Embedded Customization	Advanced	Digital Transformation,Tools and Technology,Warehouse/Fulfillment	Kinetic
5/23/2022 13:00	5/23/2022 17:00	EE 33: Combining Other Data with Your Epicor Data Analytics (EDA) Content Packs for a Consolidated View: A Technical Deep Dive into EDA Database Designer	COST: There is an additional \$275 fee to attend this session. Through this four-hour extended education session learn how to sync data from external data sources or additional data fields from your Prophet 21 or Kinetic system with your existing EDA content packs for a consolidated view. This class will provide value to those organizations who are looking to augment their ERP data with information from other sources such as Salesforce, Hubspot, Google Analytics, and HR databases. This session will give you the skills to tap into all types of data sources to enhance decision-making, address new opportunities, and improve your overall operations.	OBJECTIVES: At the end of this session you will: <ul style="list-style-type: none"> • Have the knowledge to pull external or alternative data sets into your EDA environment • Gain the skillset to build out Custom Databases inside Database Designer • Have a better understanding of the EDA Ecosystem AUDIENCE: This session will appeal to the following audience: <ul style="list-style-type: none"> • Database Administrator • IT Role • Anyone with SQL Knowledge PREREQUISITES: We recommend that you are an existing EDA customer and have a desire to interact with External data. You will need to have some Administration permissions inside EDA to have access to Designer.	Advanced	BI/Analytics/Reporting,Financials	Kinetic;#Prophet 21
5/23/2022 13:00	5/23/2022 17:00	EE 35: CPQ (formerly KBMax) 3D Scene Features and Visuals	COST: There is an additional \$275 fee to attend this session. A 3D visual is often the first experience your customer will have with your product, and you want that first impression to be a memorable one – In this Extended Ed session, 3D design experts give a guided tour of CPQ 3D Scene Features and share tips and tricks for bringing your product to life: Learn how to create realistic, production-ready materials and lighting for both static and dynamic views, how to develop sophisticated configuration workflows to allow your customer to create *their* product, and how we can use those skills to help communicate your product's story through engaging, compelling 3D design.	OBJECTIVES: At the end of this session, you will: <ul style="list-style-type: none"> - Use the Creator to build your Dream Yard - Have a deep understanding of KB3D's texture layering system capabilities - Have knowledge of techniques for approaching complex geometry and material problems - Apply fundamentals of lighting and composition to Viewpoints - Apply snap code to solve practical product configuration challenges AUDIENCE: This session will appeal to the following audience: <ul style="list-style-type: none"> - 3D Scene Designer - Configuration Engineer PREREQUISITES: CPQ Foundations: Showing Your Product:	Advanced	Cloud,Sales/Services,User Experience,Tools and Technology	Kinetic

Insights 2022 Extended Education Agenda

updated 2-16-2022

Start Time	End Time	Title	Description	Description Continued	Session Level	Theme	Product
5/23/2022 8:00	5/23/2022 12:00	EE 36: Understanding Pricing - Set Up Price Matrixes to Get the Best Bang for Your Buck!	Being a successful and profitable company is the ultimate goal of any organization. One of the ways to be profitable is to charge customers a price so that you make a good profit based on the cost of the order. At the same time, you don't want to charge too high of a price or you will lose business to your competitors. Also, not all customers are the same. Some customers are retail customers that only buy from you once in a while and other customers are repeat customers who buy a lot from you often. Most likely you will want to charge the retail customers a higher price and be more profitable while for the repeat customers, you want to be more competitive with your pricing in order to not lose their business. So how do you set your pricing structure in order to be most profitable and not lose repeat customers? That is what this course is all about.	OBJECTIVES Upon successful completion of this course, you will be able to: <ul style="list-style-type: none">• Understand the theory of a sell matrix• Describe what consists of the X-Axis and Y-Axis• Create sell matrixes using the Sell Matrix screen• Utilize the different types of matrixes• Navigate the Quick Sell Matrix• Understand the Pricing Hierarchy AUDIENCE This course will appeal to the following audience: <ul style="list-style-type: none">• Anyone responsible for managing price sheets or pricing on orders PREREQUISITES <ul style="list-style-type: none">• Basic knowledge of Eclipse Pricing including the ability to	Intro	Sales/Services	Eclipse