

The Regular Quarterly Meeting of the Midwest User Group was called to order at 10:20 a.m. on Friday, November 15<sup>th</sup> at Pilot Pete's Restaurant located in Schaumburg, Illinois. Calvin Dekker served as moderator for addressing opening business.

Members were asked to vote on dates for the 2014 Quarterly Meeting schedule. The dates selected are:

Quarter One; February 7, 2014

Quarter Two; May 16, 2014

Quarter Three; August 15, 2014

Quarter Four; November 14, 2014

Due to the changes in the Vista, Vantage and Epicor software marketing, a review of the organization name (VMUG: Vantage Midwest User Group) was requested. Members provided new User Group name suggestions. The new name "Epicor Midwest Users Group" was selected.

Several members offered information on where to obtain suggestions and solutions within a community setting. Among these were:

Epicor Yahoo Group

Linkedin Groups

Spiceworks.com

Members were asked for topic suggestions for future meetings. Topics included:

Version 10 Overview of new features

Version 10 comparison to version 9 similarities and differences

Major differences between Crystal Reports and sequel

The conversation moved to an open mic discussion led by Calvin Dekker about the conversion process to 9 as well as information obtained at the user summit regarding 10. A copy of the presentation is appended to these minutes. Highlights of the discussion included the steps for a successful conversion, which were discussed in the order of execution. Helpful tips were offered to help make this conversion work. Additionally, it was noted that the DMT tool has been rated by users as more valuable than the DUU tool. Although the DMT is not free, it offers a tangible opportunity for cleanup of data. Finally, it was reiterated that when upgrading, hierarchy is very important; the upgrade must be performed in the correct order.

After the break for lunch and networking, a raffle for gifts was held. The meeting then proceeded with a presentation conducted by Mark Olbrantz of Swiss-Tek Coatings, Inc.

Mark presented on the topic of MES by discussing his company's methods for tracking material received from clients. Swiss-Tek offers an "outside process", painting, powder coating, etc. There is no inventory to track, and no in-house parts. The items must be tracked within Swiss-Tek's facility for the duration of the process, and shipping information must be documented.

Mark highlighted the processes to track:

1. Batching – up to 50 orders within a single process
2. Identifying – keeping different orders separate and recognizable
3. Track: Every order within the facility progress
4. Report: labor costs per order, tracking employee work time and efficiency

Following the MES Presentation by Mark, the floor was opened for questions and discussion. Topics included:  
Will present customizations migrate to the new version? It was advised that all customizations should be saved, to be reset after upgrade.

Is 703 the last patch, or will there be more? As long as there is an issue, Epicor generally issues a patch to fix it.

The final presentation for the meeting discussed the Technical Preparation and Best Practices for an Upgrade was lead by Calvin Dekker of CodaBears. The details that were reviewed are included in the attachments.

The meeting concluded at 3:30 p.m.

The next regular scheduled Epicor Midwest User Group Quarterly Meeting is scheduled Friday, February 7, 2014



# VMUG Meeting 11/15/2013 PRESENTATION NOTES

## Conversion Process to 9

### Data Upgrade Utility

#### Preparations

1. Download/Locate DUU (DO NOT INSTALL YET)
2. Ensure Minimum Requirements
  - a. 32 bit workstation 9.05.70x
  - b. 8.03.409c or 410
  - c. Licenses for 9.04 and 9.05 on 32bit machine (keep separate)
  - d. Clean UOM db from 8.03
3. Disable all MS schedules & agents
4. Truncate, repair and backup at each step.

#### Steps

1. Copy 8.03 Live, Truncate BI, Run ProStrct repair, Backup custom reports & BPMs (note location of backup file)
2. RUN UOM conversion #9800 on 8.03 from Admin Tools
  - a. Make sure not to close with the APPLY button just close the program with the X in the corner.
3. Verify UOM completed on the Admin Tools menu
4. Create a backup of the UOM db. (note location of backup file)
5. 8.03 – 9.04 Conversion
  - a. If already installed – uninstall and delete the following folders:
    - i. C:\epicor\epicor905\db\upgrade904
    - ii. C:\epicor\epicor905\MT
    - iii. C:\epicor\epicor905\Upgrade904
  - b. Set all APP, TASK, PROCESS & DB to auto start
  - c. Reboot server(s)
  - d. Install DUU (specify locations of backups above)
  - e. Follow Epicor's instructions for installing licenses
6. Edit ConvParam based on your GL chart setup.
7. Run Data Conversion 8.03 to 9.04 by starting Admin Tools
8. Backup Database upon completion of conversion, Truncate, Repair
9. Run 10080 Conversion from 9.04 Admin Tools
10. Backup Database upon completion of conversion, Truncate, Repair
11. 9.04 – 9.05 Conversion
  - a. Restore backup to Epicor\Epicor905\db folder
  - b. Start Epicor 9.05 database
  - c. Schema Change 9.04 to 9.05
  - d. Run data conversions 9.04 to 9.05 in Admin Tools
  - e. Stop 9.05 db upon completion of conversion
  - f. Backup Database, truncate, repair
12. Run conversion program 10012
13. Backup Database, truncate, repair, Backup 1 more time.
14. Only 45 day of history is converted. Run Conversion program 10080 to migrate additional financial data!
15. Done.



## VMUG Meeting 11/15/2013 PRESENTATION NOTES

### Data Management Tool

Imports for:

- Inventory (Whse/Bin, Parts, Prod Groups, Classes, SN, UOM, ShipVia)
- Engineering (Operations, Resources, Res. Groups, BOMS)
- Suppliers (Vendors, Purch Points, Contacts, Groups, Price Lists)
- Customers (Customers, Contacts, Billing, Price Lists, Groups, ShipTo)
- Sales (Orders, RMAs, Price Lists)
- Purchasing (Purchase Orders, Price Lists)
- Service (Service contracts, Warranties...)
- Production (Projects, Employees, MPS, Jobs, Adjustments, & Schedules)
- Financials (COA, Open AP/AR, GL Accounts, Books, Banks, Budgets, Assets, Categories...)
- System (Users, Menus, Tasks)

### Re-Implement Manual Load

## Tech Prep & Best Practice for an Upgrade

Documentation of Customizations

- Only migrate the customizations required.
- Export and then Delete all un-used customizations
- Document all custom fields being used.

BPMs Documented

- Export and then Delete all non-Enabled Method Directives.

BAQs Documented

- Export and then Delete all non-used BAQs.

Copy the following out of Epicor directories:

1. Customizations
2. Crystal Reports & Custom Reports
3. Config files from Epicor installation
4. Epicor Client, Epicor Server & Progress
5. BPM directories
6. Product Configurator files

For installation of new version:

- Pre-Read directions.
- Verify minimum requirements are met.
- Patch all Windows environments