

The Regular Quarterly Meeting of the Midwest User Group was called to order at 10:10 a.m. on Friday, November 14 at Bloomingdale Golf Club located in Bloomingdale, Illinois. Mark Olbrantz and Calvin Dekker served as moderators for addressing opening business.

Calvin reviewed the date for the 2015 Quarterly Meetings:

- Friday, February 6<sup>th</sup>
- Insights is in May 18-20<sup>th</sup>
- Wednesday, June 3<sup>rd</sup>
- Wednesday, August 12<sup>th</sup>
- Friday, November 13<sup>th</sup>

Topic Requests in general order of interest:

Financials, SSRS, BPMs 10 focus, Advanced BAQs, DMT, Handhelds and Tablets, SQL Training, Upgrading to Version 10, EDI, Demo on Epicor Social, Scheduling, Experience of moving from 8 to 9 to 10, Document Management, Performance Enhancements/Tuning geared toward 10, auto-generated emails, MRP, VB.NET to C# conversion, Visual Studio, SSIS, BAM, supplier portal, customer portal, EDI Tie Kinetics.

An introduction of new a new Epicor contact was made by Kevin Gallagher. Dave Meyer (new CAM) based in Minnesota. Kevin also talked briefly regarding the new structure for working with multiple CAMs.

Question from member was raised regarding ability to run Vantage 8 and supported server. There are members who are presently running Vantage 8 on Server 2008R2 64bit. Although not officially supported through Epicor, the member has not had problems.

Scott Kaufman provided a presentation on BAQ's in Epicor 10. Some of the updates and highlights he provided included:

- Highlighting the advanced functionality of BAQ's in 10
- No Lock command runs differently in Progress than SQL. Not even allowed to use that in the BAQ designer
- Review the of the menu items such as the Actions Menu
- He encouraged always copy the query from the original to test and then you can always copy into the original. You can export or import queries.
- Can set ownership
- Generate ASP – can set to web page to run the query
- Filter will compile entire query get all results and then filter results
- Parameters will limit dataset that is pulled to begin with – so faster
- Skip condition if empty – will pass the parameter and return all rows (checkbox)
- Subquery options is a useful new feature in 10, including Union, UnionAll – will take two distinct data sets and merge into one.

- Scott showed an example of utilizing multiple subqueries to pull inventory from warehouse, DMR and Inspection so that all inventory is identified in one table
- Subquery: Use of Pivot Tables - showed an example using all order, set a calculated field to show year and then run the pivot.
- Indented BOM example. In version 10, one of the subquery types is CTE. Allows to run recursive query (query the results of the query)
- External BAQs
- Nice feature in 10 is row counts in analyze data, can also set rows to return to test the query for speed, etc. E10 limits to top 10,000 rows to return
- Can get the query execution plan.

Calvin Dekker of CodaBears provided some feedback on Lessons Learned in an Epicor 10 implementation. The presentation is appended to the minutes.

Dana Rick of CodaBears provided a brief review of EpicWeb. The presentation is appended to the minutes.

After the break for lunch and networking, the meeting reconvened with a presentation by Fred Zelhart of CodaBears for SSAS (SQL Server Analysis Services).

- Working against the data warehouse
- Create a cube – which allows for analysis/slice-dice of information
- Codeplex.com – can download sample Microsoft Databases
- SQL Server Express is free – could put on laptop
- Present data to your users in a more palatable method (i.e. instead of remembering “city, state, country” one can look at “geography”)
- Or set an SSRS report for the pivot that can be exposed on a web page

The meeting concluded at 3:30 p.m.

The next regular scheduled Epicor Midwest User Group Quarterly Meeting is scheduled Friday, February 6, 2015.

The Epicor logo graphic consists of three overlapping, curved, concentric shapes that resemble a stylized 'C' or a spiral. The colors transition from a bright yellow at the top to a deep orange at the bottom, with a gradient effect. The shapes are set against a solid black background.

# Epicor 10 Lessons Learned

- © **ERP Team Identification**
- © **Executive Escalation Process**
- © **Change Management Control**
- © **Business Process Review & Documentation**
- © **Server Structure & Virtual Machines**
- © **Reporting**
- © **System Functionality**
- © **Issue Reporting**
- © **Testing**
- © **Recap**

## © ERP Team Identification & Executive Escalation Process

- Executive Team
- Project Manager
- ERP Manager
- Power / Key Users

## Change Management Control

- Project Scoping
- Scope Creep
- Error Identification & Handling

## © Business Process Review & Documentation

- Establish a base line / ground zero
- Document Business Functions and Procedures
- User Training and Sign-Off
- Elect business procedures for BPMs to minimize errors

## © Server Structure & Virtual Machines

- **Environment**
  - Single Sign-On
  - User Windows Channel
- **Virtual Hosts** (Copying data, reports, customizations)
  - VM1 Pilot, Training, Test
  - VM2 Production
  - VM3 SQL Prod
  - VM4 SQL All else & Custom



## © Server Structure & Virtual Machines, continued

- **Reporting**

- Pilot, Training, Test, Production
- SSRS – Epicor
- SSRS – Company Specific

- **IIS & Resetting**

- Reboot the server if changes are taking.
- Always run IIS resets as the Administrator (not a person with permission)

- **Data Management Tool (DMT)**

- Master Tables
- Transactional Data

## © Reporting

- **Convert SSRS from ODBC Crystal Report**
  - <http://crystalmigration.com/index.html>
- **Updating Epicor Reports**
  - Internal User
  - Outward Facing Documents
- **Document Management & SharePoint**

## System Functionality

### **Sales Management**

- CRM
- Quotations
- Orders
- EDI
- Product Configurations

### **Service Management**

- Maintenance
- Field Service

### **Production Management**

- Job Management
- Multi-Plant
- Engineering
- Scheduling & APS
- AMM
- MES
- Quality & Advanced Quality

### **Materials Management**

- Inventory Management
- Shipping / Receiving
- Purchasing
- SRM

### **Financial Management**

- Accounts Receivable
- Accounts Payable
- Cash Management
- General Ledger
- Payroll
- Currency Management
- Multi-Company

### **System Configuration**

- Company Configuration
- Site Configuration
- Site Costing
- Company Maintenance

### **System Management**

- Business Activity Queries
- Business Process
- Customizations
- System Schedules & Task Management
- Executive Cubes
- System Agents
- Context and Process Scheduling

## Issue Reporting

- **Working with Support**
  - Technical Support Calls
  - EpicWeb SCR Creation
  - Searching Answerbooks
  - YahooGroup / Tech Groups / Peers
- **Bug Escalation Process**
  - Calling Support

## Testing

- **System Configurations**
  - Company & Site configuration changes
- **System Data**
  - Master Table changes
    - 6 & 10
    - 8 & 10
    - 9 & 10
- **Transactional Data**
  - Verify data is where it should be.
  - Review record counts.
  - Run calculations to cross validate loads.

## © Testing, continued

- **Internal Business Reports & Forms**
  - User data represents what is truly needed
  - Validation that calculations are correct
- **Outward Facing Documents**
  - Customer / Supplier Documents
  - Respective Contacts
  - Data Accuracy
  - Calculations
  - Module to Module Data Transfers



**CodaBears, Inc.**

**Calvin Dekker**

**calvin@codabears.com**

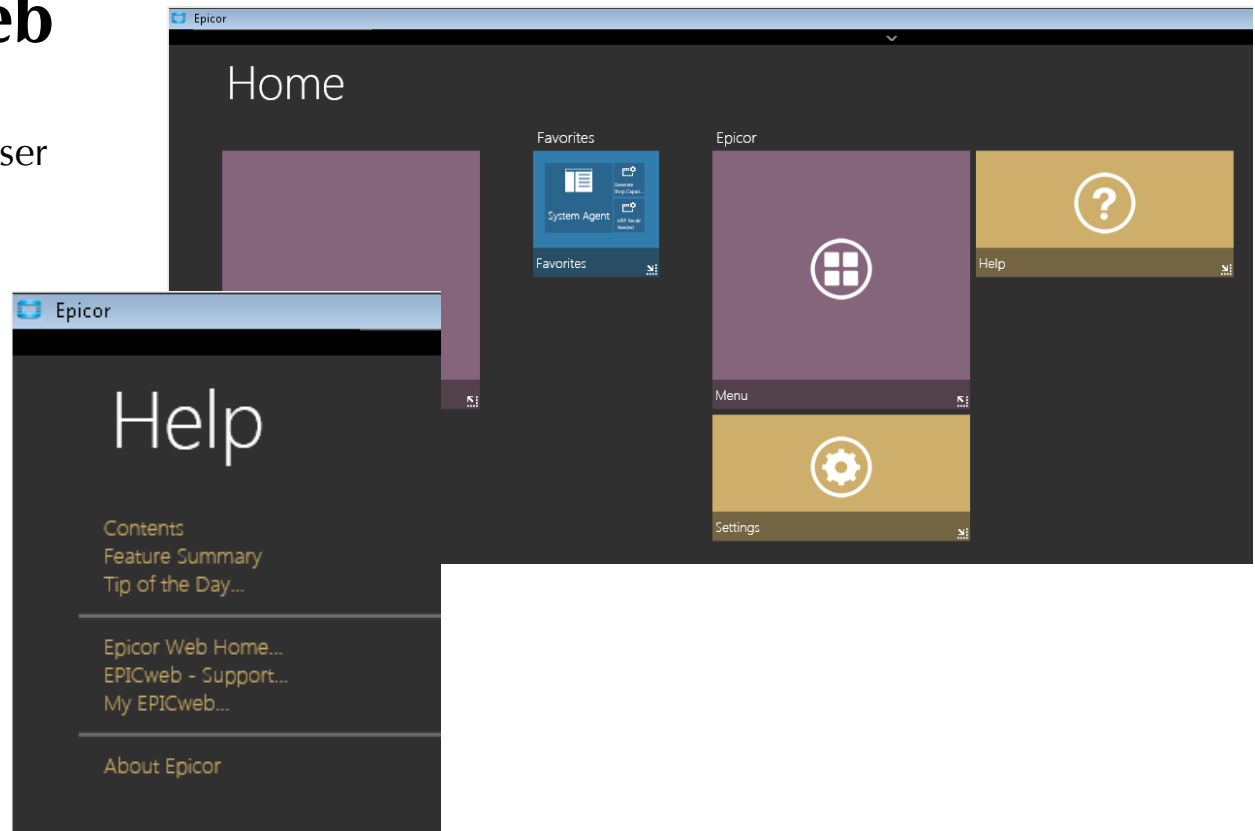
**(630) 672-7688**

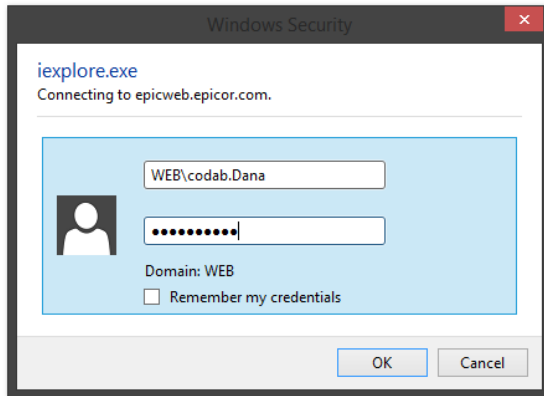




## Getting to EPICweb

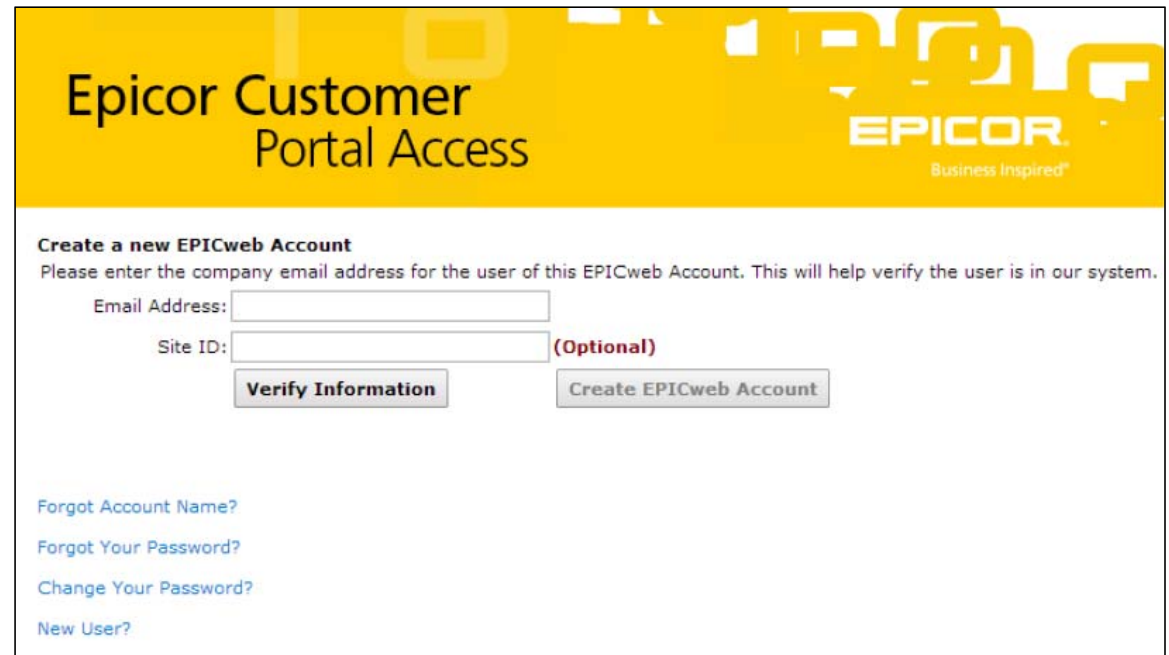
1. Via the Help Menu in Epicor
2. Directly through a Web Browser  
<https://epicweb.epicor.com>





## Already Have an Account

1. Via the Help Menu in Epicor
2. Directly through a Web Browser  
<https://epicweb.epicor.com>



**Epicor Customer Portal Access**

**EPICOR**  
Business Inspired™

**Create a new EPICweb Account**  
Please enter the company email address for the user of this EPICweb Account. This will help verify the user is in our system.

Email Address:

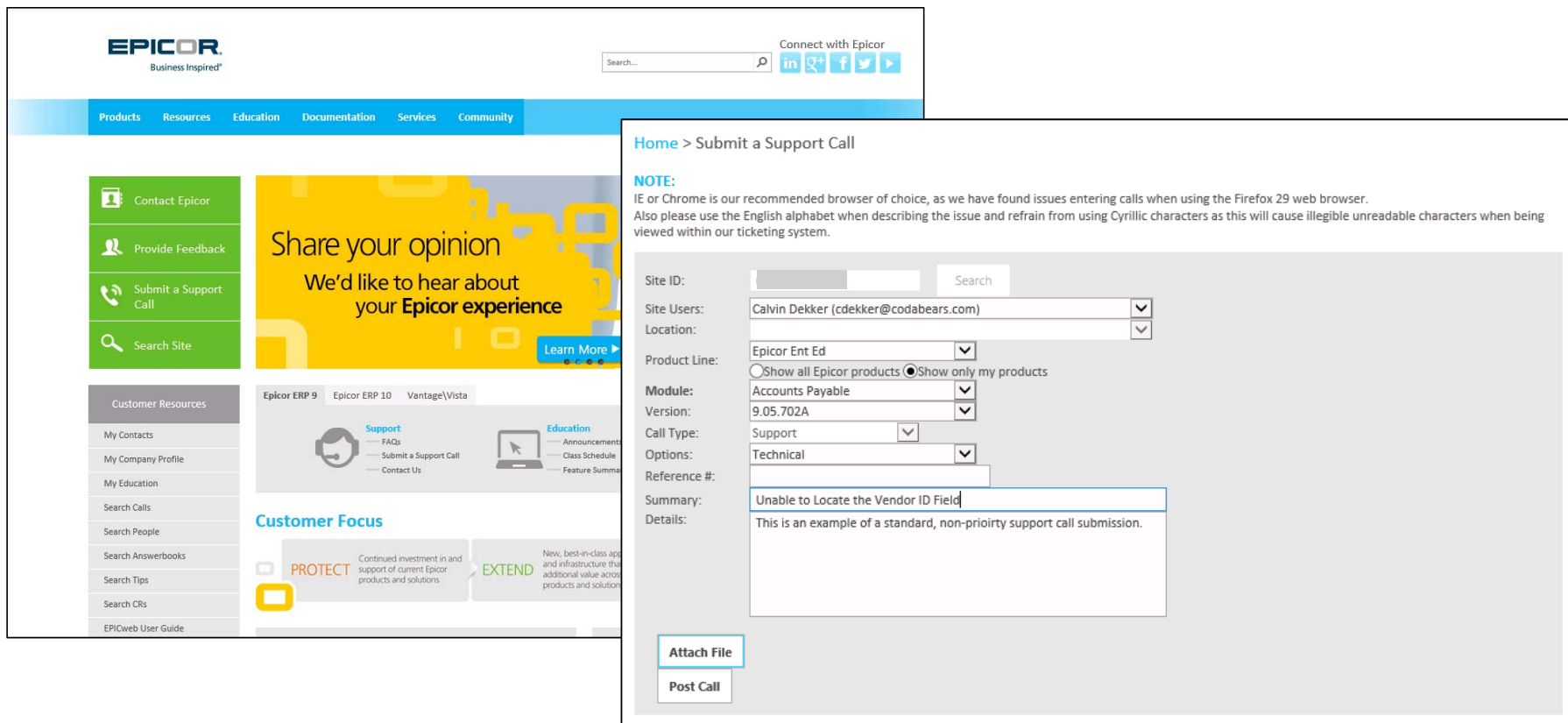
Site ID:  (Optional)

[Forgot Account Name?](#)  
[Forgot Your Password?](#)  
[Change Your Password?](#)  
[New User?](#)

## To Create an Account

1. Enter e-mail address
2. Click Verify Information button
3. You will receive an email
4. If information incorrect, contact CAM or [EPICweb@Epicor.com](mailto:EPICweb@Epicor.com)

# Submit a Support Call



The screenshot shows the EPICweb interface for submitting a support call. The top navigation bar includes links for Products, Resources, Education, Documentation, Services, and Community. A search bar and social media icons are also present.

The main content area features a sidebar with 'Contact Epicor', 'Provide Feedback', 'Submit a Support Call', and 'Search Site'. A central banner encourages users to 'Share your opinion' about their Epicor experience.

The 'Submit a Support Call' form is displayed on the right, with the following fields and options:

- Site ID:** Searchable text field.
- Site Users:** Calvin Dekker (cdekker@codabears.com)
- Location:** Dropdown menu.
- Product Line:** Epicor Ent Ed
- Module:** Accounts Payable
- Version:** 9.05.702A
- Call Type:** Support
- Options:** Technical
- Reference #:** Empty text field.
- Summary:** Unable to Locate the Vendor ID Field
- Details:** This is an example of a standard, non-priority support call submission.

Buttons for 'Attach File' and 'Post Call' are located at the bottom of the form.

## Escalating a Support Call

1. Timing for Web Support Call submission/review
2. When to “Pick up the Phone” 888-374-2679 (888-EPICOR9)

## Support Call Status

1. Timing for Web Support Call submission/review
2. When to “Pick up the Phone” 888-374-2679 (888-EPICOR9)

# Search Your Open Calls

Home > Resources > SearchCalls

Search Calls

Sites: 29575 - CodaBears, Inc, 65831 | Site ID:

Call Num:  | Summary Keyword:

Start Date: 11/10/2013 | End Date: 11/28/2014

Contact:  | Issue:

Status: All | Priority: All

Open Calls Only: No | Show Site Names: No

Call Type: All | Reference #:

Call Age (days):

Site ID	Contact	Call Num	Status	Call Type	Summary
29575	Calvin Dekker	3256833ESC	Closed	Support	ERP10 question

<b>Call Number:</b> 3256833ESC	<b>Company:</b> CodaBears, Inc
<b>Status:</b> Closed	<b>Call Type:</b> Support
<b>Contact:</b> Calvin Dekker	<b>Opened By:</b> JOHERRERA
<b>Email:</b> calvin@codabears.com	<b>Date Opened:</b> 11/12/2014 5:22:53 PM
<b>Phone:</b> 6306727688	<b>Closed By:</b> JOHERRERA
<b>Assigned To:</b> JOHERRERA	<b>Date Closed:</b> 11/13/2014 12:40:11 PM
<b>Module:</b> Technical	<b>Version:</b> Not live
<b>SCR Number:</b>	<b>Reference #:</b>
<b>Summary:</b> ERP10 question	

**Details:** [Re-open Call](#)

<b>Added:</b> 11/13/2014 12:39:41 PM	<b>By:</b> JOHERRERA
<b>Summary:</b> Outgoing E-mail	
<p>-----Original Message-----            From: Jorge Herrera            Sent: Thursday, November 13, 2014 12:40 PM            To: 'calvin@codabears.com'            Subject: Call 3256833ESC Support Reply: ERP10 question</p> <p>Hi Calvin, the new ERP10.1 will be available the first Quarter of the Next Year, for more information contact your CAM.</p> <p>Please reference call # 3256833ESC if you have any additional questions on this issue.</p>	

<b>Added:</b> 11/12/2014 5:22:53 PM	<b>By:</b> JOHERRERA
<b>Summary:</b> ERP10 question	
..PROBLEM DESCRIPTION	
customer ask for the realize of ERP 10.1	

# Call Summary

- Account Team
- Customer Account Manager**

1. Customer Account Manager
2. Call Summary
3. Maintenance

Call Summary
✕

**Status**

Closed

Open

Order Processed

Pending

Waiting

**Calls:**

Basic Information
Additional Information

Call Num	Contact	Open Date	Status	Summary
6793377MPS	Kent Rooen	11/4/2014	Open	SCR - 90165 BPM - Second condition on BPM not working
6790587MPS	Jennifer Mesiano	10/7/2014	Open	39851MPS Authentication required on custom Crystal reports uplifted from Epicor9
1571381PSC	Kent Rooen	2/18/2014	Open	Consulting Request - Walton Enterprises Ltd. for Reports/Business Intelligence C
1561269PSC	Kent Rooen	1/22/2014	Open	Consulting Request - Walton Enterprises Ltd. for Reports/Business Intelligence C
1557012PSC	Kent Rooen	1/8/2014	Open	Consulting Request - Walton Enterprises Ltd. for Reports/Business Intelligence C

**Maintenance**

Type	Exp
EPIC20	01/31/2015
VN	01/31/2015
VNES	11/15/2005
E10-20	01/31/2015

# Open Change Requests

[Home](#) > [Resources](#) > Search CRs

Platform: ERP 10 Ent Ed | Action: View Open High Priority Change Requests | View Report

Module: ALL | Any Key Words: |

Version: ALL |

Change Req #: |

Status: All |

[Home](#) > [Resources](#) > Search CRs

Platform: Epicor Std Ed | Action: Find Change Requests by Number or Keywords | View Report

Module: ALL | Any Key Words: |

Version: ALL | All Key Words: AP |

Change Req #: | Phrase: |

Status: All |

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1 of 1 | 100% | Find | Next | [Icons]

CR Number	Description	Version	Priority	Open Date
<a href="#">7245ESC</a>	AP - The book is not configured with a vaid currency	9.04.506b	1 (Loss or Corrupt D)	06/07/2010

# EPICweb Feedback

The screenshot shows the EPICweb homepage. At the top left is the EPICOR logo with the tagline "Business Inspired". To the right is a search bar. Below the logo is a blue navigation bar with links for Products, Resources, Education, Documentation, Services, and Community. On the left side, there is a green sidebar with buttons for "Contact Epicor", "Provide Feedback", "Submit a Support Call", and "Search Site". The main content area features a large yellow banner with the text "Share your opinion We'd like to hear about your Epicor experience" and a "Learn More" button. Below the banner, there are sections for "Customer Resources" (My Contacts, My Company Profile, My Education, Search Calls, Search People, Search Answerbooks, Search Tips, Search CRs, EPICweb User Guide) and "Customer Focus" (PROTECT, EXTEND, CONVERGE).

Home > Customer Feedback

## EPICweb Feedback

Username:

Full Name:

Site ID:

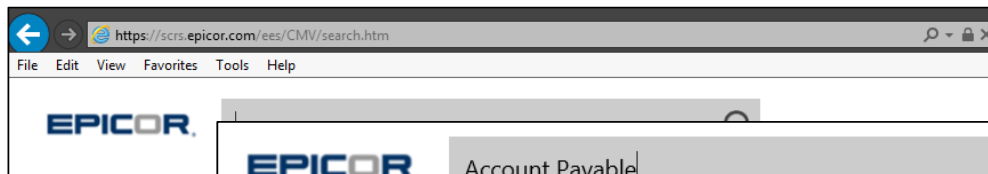
Organization Name:


Title:

Comments:



 <https://scrs.epicor.com>



 Account Payable ✕ 🔍  
[Edit Preferences](#)

SCR 88631 - CSF Peru - AP Bill of Exchange affects Accounts Payable account twice [Open With...](#) [Copy](#) [Advanced Copy](#)

SCRs - The Matrix (VN20C)  
SCR=[88631](#), Part=[EA-APBillofExchange](#), Description=CSF Peru - AP Bill of Exchange affects Accounts **Payable account** twice, Priority=HIGH, Severity=2 - Error NO Workaround, Type=Application, Module=CSF-PE, Target SP=9.05.700, Product=[EPIC](#), Fixed In List=9.05.700~~~, Fixed Date=3/23/2012, Status=Complete-SCR, Company=VN20C, SysRowID=9fae2fc9-02a1-439e-e011-2cd0299402d3, Found in Version=9.05, Found in Build=9.05.606

SCR 62121 - Payment Instrument Payable/Receivable - Tax is suspended on Interim Account if Invoice is paid with Payment Instrument [Open With...](#) [Copy](#) [Advanced Copy](#)

SCRs - The Matrix (VN20C)  
SCR=[62121](#), Part=[EA-PaymentInstrumentPayable](#), Description=Payment Instrument **Payable/Receivable** - Tax is suspended on Interim **Account** if Invoice is paid with Payment Instrument, Priority=HIGH, Severity=2 - Error NO Workaround, Type=Application, Module=AP, Target SP=9.05.700, Product=[EPIC](#), Fixed In List=9.05.700~~~, Fixed Date=3/9/2012, Status=Complete-SCR, Company=VN20C, SysRowID=806d58a9-6188-3881-de11-562f688d7248, Found in Version=9.04, Found in Build=9.04.501

SCR 138854 - Payment Instrument Payable Edit List -is showing incorrect amount in the GL Account Recap section of the report. [Open With...](#) [Copy](#) [Advanced Copy](#)

SCRs - The Matrix (VN20C)  
SCR=[138854](#), Part=[EA-PaymentInstrumentPayable](#), Description=Payment Instrument **Payable** Edit List -is showing incorrect amount in the GL **Account** Recap section of the report., Priority=IH, Severity=4 - Cosmetic, Type=Application, Module=AP, Clientele ID=1746928BRK, Target SP=10.0.700, Product=[EPIC](#), Fixed Date=6/1/2014, Status=Complete-SCR, Company=VN20C, SysRowID=53230ea4-6faa-4dfa-aaab-2591586454cb, Found in Version=10.01, Found in Build=10.0.600



**CodaBears, Inc.**

**Dana Rick**

**dana@codabears.com**

**(630) 672-7688**