Extended Education for Insights Europe

Our elite training sessions which are developed by the Epicor worldwide Epicor Learning team, Product Management, Product Development, Support, and Services will be available Sunday, 1 June and Monday, 2 June 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, new 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.

Sessions are four hours and run from 8:30 am to 12:30 pm or 1:30 pm to 5:30 pm. Four-hour courses are £215.

Attendees will need to bring their own laptops to these sessions to access the virtual images. Laptops will not be provided.

Sunday AM 8:30-12:30	Sunday PM 1:30-5:30	Monday AM 8:30-12:30	Monday PM 1:30-5:30
EE 1: Driving System Enhancements with Application Studio Fundamentals	EE 4: Expanding System Enhancements with Application Studio: Advanced	EE 7: Creating Advanced Business Activity Queries (BAQs) for Better Data Management	EE 10: Upgrading Classic Customizations to Kinetic UX
EE 2: Introduction to Processing MRP and Generating Suggestions	EE 5: Analyzing MRP Results, Fine Tuning Schedules, and PO Suggestions	EE 8: Job Management Utilizing Kinetic Advanced Manufacturing Features	EE 11: Enhancements to Inventory and Material Management in Kinetic

Color Key: Tools | Manufacturing | Modules

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EE 1: Driving System Enhancements with Application Studio Fundamentals

Program Level: Beginner

When customizing your Kinetic applications, 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.

Cost: There is an additional £215 fee to attend this session.

Objectives:
♦ Understanding Application Studio Structure and its Elements
♦ Use the Basic Application Wizard
♦ Add dashboards to existing forms
♦ Upgrade Classic Dashboard to Kinetic
♦ Create Data Rules to highlight controls
♦ Create Parent and Child panel card grids
♦ Add User-Defined (UD) columns through drop-down lists and searches
♦ Create Custom Events
♦ Export/Import Layers

Audience:
♦ Software Developers
♦ System Administrators

Prerequisites:
♦ Understanding of Business Activity Queries (BAQs)
♦ Understanding of User-Defined (UD) columns

14 April 2025

EE 2: Introduction to Processing MRP and Generating Suggestions

Program Level: Introduction

This session is designed to introduce the primary functions of the Material Requirements Planning (MRP) module. It also covers the use of MRP tools to both estimate potential demand; and propose the supply that answers this demand. Additionally, it addresses the review of forecasts and master production schedules as a demand source, along with other demand sources, such as inventory requirements and orders. The emphasis of this lesson is on the process of MRP, running MRP on a scheduled basis, review the MRP jobs, and firming up those jobs for production.

Cost: There is an additional £215 fee to attend this session.

Objectives:
♦ Understand the demand and supply side of MRP
♦ Explain what happens in the background when you select Process in Process MRP
♦ Find and explain the MRP log
♦ Generate and explain job suggestions and change suggestions to firmed jobs

Audience:
♦ COO/Operations Manager
♦ Scheduler
♦ Shipping and Receiving
♦ Production Manager
♦ Purchasing Staff/Buyer

Prerequisites:
♦ Engineering
♦ Job Management
♦ Inventory Management

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EE 4: 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.

Cost: There is an additional £215 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 5: Analyzing MRP Results, Fine Tuning Schedules, and PO Suggestions

Program Level: Advanced

This session focuses on analyzing results from MRP and learning where the data originates from, how changes to the various fields that influence MRP data results, and why it's important. You will learn the difference between MRP and Global Scheduling, and why you would choose infinite or finite scheduling when planning your shop floor. And finally, the suggested material to replenish inventory, fill sales orders, and add to jobs will be analyzed, as well as you will understand why accuracy of PO Suggestions matter.

Cost: There is an additional £215 fee to attend this session.

Objectives:
- Identify issues that may occur with MRP
- Understand new features released within the past year including but not limited to Dynamic Time Fence and others
- Understand why accurate MRP data matters
- Understand the difference between MRP and Global Scheduling
- Understand the difference between infinite and finite scheduling
- Understand why accurate PO suggestions matter

Audience:
- Production Controller
- Material Planner
- Operations Manager
- Scheduler
- Buyer

Prerequisites:
- Navigation
- Basic MRP Understanding

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EE 7: Creating Advanced Business Activity Queries (BAQs) for Better Data Management

Program Level: Advanced

This advanced course goes beyond the basics of creating a query. Designed for those who want to build on their foundational knowledge of business activity queries (BAQs), you first explore Intercept and Except queries that display differences between two sets of data. Then see how to create Inner subqueries with calculated fields that total results in a TopLevel subquery. You will also create a BAQ that displays results in a PIVOT table. Then by examining Common Table Expression (CTE) and recursion, you create a query that displays hierarchical data. The course ends by showing how you create updatable BAQs that change records in the database.

Cost: There is an additional £215 fee to attend this session.

Objectives:
- Create an Except business activity query
- Create an Intercept business activity query
- Create Inner subqueries that display calculated results in a TopLevel query
- Use the Common Table Expression to display hierarchal data
- Design a business activity query that displays results in a PIVOT table
- Create an updateable query

Audience:
- System Administrator
- IT/Technical Staff

Prerequisites:
- Business Activity Queries (BAQs) (Basic Understanding)

EE 8: 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.

Cost: There is an additional £215 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 10: Upgrading Classic Customizations to Kinetic UX

Program Level: Advanced

Are you wondering how you convert your Classic customizations into Kinetic applications? This session takes you through a step-by-step upgrade example. You start by using a conversion script that moves a Classic customization into Application Studio. You then open the custom layer in Application Studio, updating elements from the Classic customization to run as Kinetic data views, data rules, and events. You also refine the user interface so that the Classic customization follows Kinetic user interface (UI) conventions.

Cost: There is an additional £215 fee to attend this session.

Objectives:
♦ Learn how to run the Kinetic conversion script
♦ Open a converted Classic customization in Application Studio
♦ Update the Classic customization to use Kinetic UI conventions
♦ Refine data views, data rules, and events to run in Kinetic
♦ Update custom code to run in Kinetic

Audience:
♦ System Administrators
♦ Developers

Prerequisites:
♦ Application Studio – Intermediate Understanding

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EE 11: Enhancements to Inventory and Material Management in Kinetic

Program Level: Advanced

This session will do a deep-dive into several recent enhancements within Inventory and Material Management in Kinetic. Topics will include Advanced Unit of Measure, Automated Fulfillment, Inventory/Planning by Revision and Move Allocations. Additional topics include UIs called Inventory Advisor and Part Quantity Tracker.

Cost: There is an additional £215 fee to attend this session.

Objectives:
- Set up an example using the capabilities within Advanced Unit of Measure
- Set up an Automated Fulfillment rule class and execute it automating the process of reserving/allocating demand
- Work with an example of Planning by Revision and follow it through Planning, MRP, Purchasing and Receiving
- Use the Move Allocations feature to change the location of allocated inventory
- Learn about the Inventory Advisor UI to speed up the discovery of available inventory
- Learn about the Part Quantity Tracker for a different way to view inventory

Audience:
- Sales Personas
- Inventory Manager
- Production Personas
- Material Handlers

Prerequisites:
- Understand the basics of Order Management in Kinetic
- Understand the basics of Inventory Management in Kinetic
- Understand the basics of Advanced Material Management in Kinetic