

NovoRoi Systems, LLC

# Novo User Group Meeting 2017 Agenda

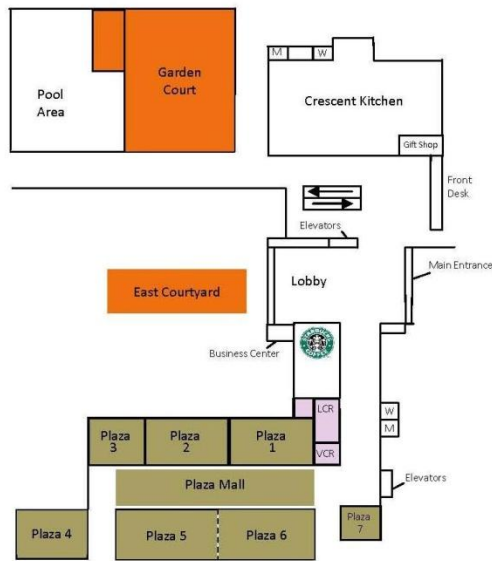
October 8 - 13<sup>th</sup> - DoubleTree by Hilton Bloomington - Minneapolis South

<b>Sunday, October 8    Welcome to NUGM 2017</b>	
<b>11:00 - 4:00</b>	<b>NUGM Golf Outing</b>
<b>3:00 - 5:00</b>	<b>NUGM Check-in -Lobby</b> Pick up your credentials and conference materials
<b>5:30 -6:30</b>	<b>Welcome Reception - Sponsored by I/O Data Systems &amp; TTK Solutions Group</b> Garden Court
<b>6:30 -8:00</b>	<b>Dinner - Veranda Ballroom</b>

\*Dinner each night is for overnight conference guests and for day conference guests who have made a reservation. Please see Diane Miller for a reservation

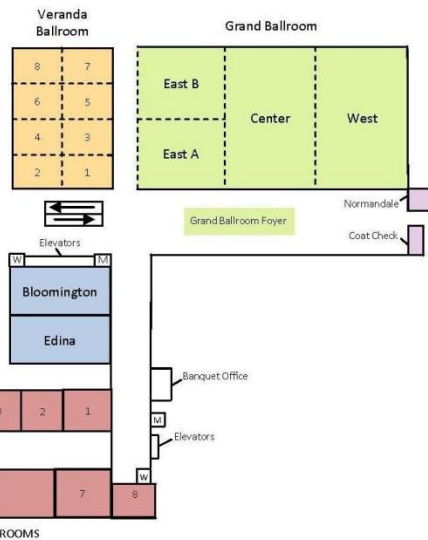
## FIRST FLOOR MEETING ROOMS

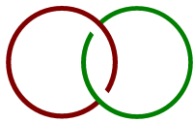
## VISTA CONFERENCE CENTER, 22ND FLOOR



M	Vista 2208
W	Vista 2207
	Vista 2206
	Vista 2205
	Vista 2204
	Vista 2203
	Vista 2202

## SECOND FLOOR MEETING ROOMS



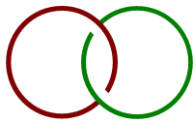


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# Novo User Group Meeting 2017 Agenda

October 8 - 13<sup>th</sup> - DoubleTree by Hilton Bloomington - Minneapolis South

<b>Monday, October 9 NUGM 2017: Conference Sessions</b>		
<b>6:30 - 8:30</b>	<b>Breakfast Buffet - Nine Mile Grill</b>	
<b>8:00 a.m. - 4:00 p.m.</b>	<b>Vendor Exhibitions - Plaza Mall</b>	
<b>8:30 - 9:20</b>	<b>Welcome Address - Plaza 5 &amp; 6 Trey Miller, NovoRoi Systems/Epicor Users Group/Epicor Prelude</b>	
	<b>Plaza 4</b>	<b>Plaza 3</b>
<b>9:30 - 10:20</b>	<b>NovoMotion Outbound 5.0</b> Team Novo	<b>Training Your New Users</b> Linda McHenry, LJM Services
<b>10:30 - 11:20</b>	<b>Sales Analysis and GL Analytics</b> Strategy Companion	<b>The Manage 2000 Upgrade Process</b> Joanne Eckenrode, NovoRoi Systems
<b>11:30 - 12:30</b>	<b>Lunch - Nine Mile Grill</b>	
<b>12:30 - 1:20</b>	<b>How to Take Care of Your Manage 2000 Server</b> Marc Harbeson, NovoRoi Systems	<b>Session - TBA</b>
<b>1:30 - 2:20</b>	<b>Attachments Anywhere!</b> Lane Johnson, Carter Day International & Doug Farmer, Epicor Software	<b>Sales Order Processing in Manage 2000</b> Vicki Gabler
<b>2:30 - 3:00</b>	<b>Break</b>	
<b>3:00 - 3:50</b>	<b>Implementing Systems Security</b> Marc Harbeson, NovoRoi Systems	<b>Credit Card Compliance in Manage 2000</b> Vicki Gabler
<b>4:00 - 4:50</b>	<b>Real-Time Storefront, Portal, Forms, Sales Tax, and Credit Card Solutions for M2K</b> Paul Batten, AdvancedWare	<b>Software Quality &amp; Testing Strategies</b> Susan Joslyn, SJ+ Systems Associates, Inc.
<b>5:30 - 6:30</b>	<b>Cocktail Hour - Garden Court</b>	
<b>6:30 - 8:00</b>	<b>Dinner - Garden Court</b>	

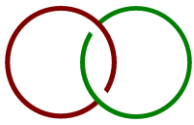


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# Novo User Group Meeting 2017 Agenda

October 8 - 13<sup>th</sup> - DoubleTree by Hilton Bloomington - Minneapolis South

<b>Tuesday, October 10 NUGM 2017: Conference Sessions</b>		
<b>6:30 - 8:30</b>	<b>Breakfast Buffet - Nine Mile Grill</b>	
<b>8:00 a.m. - 4:00 p.m.</b>	<b>Vendor Exhibitions - Plaza Mall</b>	
	<b>Plaza 4</b>	<b>Plaza 3</b>
<b>8:30 -9:20</b>	<b>NovoNexus - Warehouse Barcoding Solution</b> Team Novo	<b>User Experience Changes Over Manage 2000 Releases</b> Peter Newby, Epicor Software
<b>9:30 -10:20</b>	<b>Manage 2000 Release 8.1 Overview</b> Doug Farmer & Peter Newby, Epicor Software	<b>Building Financial Statements</b> Scott Marich, NovoRoi Systems
<b>10:30 -11:20</b>	<b>PRC - Introduction for New or Prospective PRC Users</b> Susan Joslyn, SJ+ Systems Associates, Inc.	<b>CSI M2k Style: Auditing and History Functions</b> Joanne Eckenrode, NovoRoi Systems
<b>11:30 -12:30</b>	<b>Lunch - Nine Mile Grill</b>	
<b>12:30 -1:20</b>	<b>Rocket Software</b>	<b>M2k Express Access Database GUI</b> Justin Kobylarz, Pflow Industries
<b>1:30 -2:20</b>	<b>Manage 2000 Wizard Panel: Anything Goes - Any Question - Any Topic</b> All Wizards <b>Plaza 4</b>	
<b>2:30 -3:00</b>	<b>Break</b>	
<b>3:00 -3:50</b>	<b>Session - TBA</b>	<b>Manage 2000 - A Path Forward</b> Christine Hansen, Epicor Software
<b>4:00 -4:50</b>	<b>Session - TBA</b>	<b>Replenishment Cycle: From Demand to Payment</b> TinaMarie Leeman, Sparks Belting Company
<b>5:30 -6:30</b>	<b>Cocktail Hour - Nine Mile Grill</b>	
<b>6:30 -8:00</b>	<b>Dinner - Nine Mile Grill</b>	



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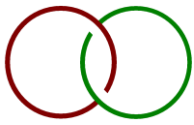
# Novo User Group Meeting 2017 Agenda

October 8 - 13<sup>th</sup> - DoubleTree by Hilton Bloomington - Minneapolis South

## Wednesday, October 11 NUGM 2017: Conference Sessions

6:30 - 8:30	<b>Breakfast Buffet</b> - Nine Mile Grill	
	<b>Plaza 4</b>	<b>Plaza 3</b>
8:30 - 9:20	<b>Sales Quote Processing</b> Lisa Petro	<b>Setting Up External Portal Access - Best Practices</b> Peter Newby, Epicor Software
9:30 - 10:20	<b>Normalized Cost Accounting</b> Scott Marich, NovoRoi Systems	<b>Overview of Web Navigation/ Configuring Web Menus</b> Linda McHenry, LJM Services
10:30 - 11:20	<b>Interactive Capacity Planning and Load Leveling</b> Lane Johnson, Carter Day International	<b>Navigation in Manage 2000: Things You Maybe Didn't Know</b> TinaMarie Leeman, Sparks Belting Company
11:30 - 12:30	<b>Lunch</b> - Nine Mile Grill	
12:30 - 1:20	<b>Manage 2000 Purchasing Module Exposed</b> Vicki Gabler	<b>The New EpiCare Customer Portal</b> Doug Farmer, Epicor Software
1:30 - 2:20	<b>Manage 2000 Accounts Payable Module Exposed</b> Vicki Gabler	<b>Web Development Topics</b> Peter Newby, Epicor Software
2:30 - 3:00	<b>Break</b>	
3:00 - 3:50	<b>How to Excel in Manage 2000</b> Linda McHenry, LJM Services	<b>Session - TBA</b>
4:00 - 4:50	<b>Closing Comments on NUGM Conference Sessions and General Discussion</b> Conference Plaza 4	
5:30 - 6:30	<b>Cocktail Hour</b> - Garden Court	

6:30 - 8:00	<b>Dinner</b> - Garden Court (Overnight Package Interactive Lab Attendees)
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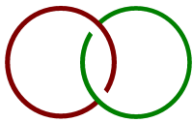


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<b>Thursday, October 12 NUGM 2017: Interactive Labs</b>		
	Vista 2202	Vista 2204
<b>7:00 - 8:00</b>	<b>Breakfast Buffet</b> - Vista Lounge 2201	
<b>8:00 - 12:00</b>	<b>Web Administrator Tasks</b> Linda McHenry, LJM Services & Peter Newby, Epicor Software	<b>MSO &amp; REPORT BUILD</b> Joanne Eckenrode, NovoRoi Systems
<b>12:00 - 1:00</b>	<b>Lunch</b> - Vista Lounge 2201	
<b>1:00 - 5:00</b>	<b>SSRS: SQL Server Reporting Services</b> Marc Harbeson, NovoRoi Systems	<b>Using UniQuery Effectively</b> Trey Miller, NovoRoi Systems
<b>5:30 - 6:30</b>	<b>Cocktail Hour</b> - Atrium 1	
<b>6:30 - 8:00</b>	<b>Dinner</b> - Atrium 1	
<b>Friday, October 13 NUGM 2017: Interactive Labs</b>		
	Vista 2202	Vista 2204
<b>7:00 - 8:00</b>	<b>Breakfast Buffet</b> - Vista Lounge 2201	
<b>8:00 - 12:00</b>	<b>FORM BUILD</b> Joanne Eckenrode, NovoRoi Systems	<b>NovoMotion Use Case, Debugging &amp; Correcting</b> Trey Miller, NovoRoi Systems
<b>12:00 - 1:00</b>	<b>Lunch</b> - Vista Lounge 2201	
<b>1:00 - 5:00</b>	<b>ECA Workflow</b> Marc Harbeson, NovoRoi Systems	<b>Web Developer Tasks</b> Peter Newby, Epicor Software & Linda McHenry, LJM Services



## Monday, October 9<sup>th</sup> - NUGM Conference Sessions

**8:30 - 9:20**    **Welcome Address - Plaza 5 & 6**

*Trey Miller, NovoRoi Systems / Epicor Users Group / Epicor Prelude*

Welcome to the 8<sup>th</sup> Annual NUGM – New Horizons of Data.

**9:30 - 11:20**    **NovoMotion 5.0 - Plaza 4**

*Team Novo*

The Novo team will show what we've been up to and demonstrate the latest NovoMotion 5.0 product development. The 5.0 release is a dramatic alteration for NovoMotion both in terms of processing systems on the U2 side and delivery systems to SQL Server environment. There are specific product improvements to be demonstrated. Come see the new stuff!

**9:30 - 10:20**    **Training Your New Users - Plaza 3**

*Linda McHenry, LJM Services*

Over time experienced users leave a company and new users come aboard. Training these users in Manage 2000 can be daunting, but you are not alone. Embedded in Manage 2000 are tools, help documentation, courses, etc. to aid and enhance the training experience. Every company deserves trained users. Make your job easier by becoming a well-trained trainer ready to train others.

**10:30 - 11:20**    **Sales Analysis and GL Analytics - Plaza 4**

*Eric Halverson & Al Siroon, Strategy Companion*

Strategy Companion is an extremely versatile Business Intelligence and data analysis tool which extends and improves upon the presentation of NovoMotion enabled systems. Come see Strategy Companion demonstrate the ease and power with which designers and non-technical users can present MS SQL Server data in multiple ways for user consumption. This demonstration illustrates Sales Analysis and General Ledger databases which originate in Manage 2000, promulgate to SQL with NovoMotion, and present in full and vibrant color dashboards and flexible, custom reports from a powerful BI. That is Strategy Companion.

**10:30 - 11:20**    **The Manage 2000 Upgrade Process - Plaza 3**

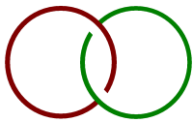
*Joanne Eckenrode, NovoRoi Systems*

The Manage 2000 Upgrade process is distinctive to each Manage 2000 installation; however, Joanne Eckenrode has seen and upgraded just about any imaginable combination of issues from unique data history to extremely custom data applications. This experience gives Joanne a succinct perspective on the Manage 2000 upgrade process. There are numerous dos and don'ts. If you're planning an upgrade, one huge don't is don't miss this session!

**12:30 - 2:20**    **How to Take Care of Your Manage 2000 Server- Plaza 4**

*Marc Harbeson, NovoRoi Systems*

We still hear horror stories of companies that have lost a disk drive when the system was not properly backed up. Other companies complain about the system running slower and slower over time. Still others are running out of disk space for no good reason. In this session we



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## Monday, October 9<sup>th</sup>

present some tried and true maintenance tasks every system administrator should be doing. Your input during this session will help others. Bring your best practices to share with others as our subject matter expert, Marc Harbeson, leads the session in good system administration techniques and hardware expert Tom Tont provides information on new technology for backing up and protecting your data.

**12:30 - 1:20 TBA - Plaza 3**

**1:30 - 2:20 Attachments Anywhere!- Plaza 3**

*Lane Johnson, Carter Day International & Doug Farmer, Epicor Software*

Why keep lots of paper files? Manage 2000 has always had the ability to attach a document, picture, image to a master file item such as a part or customer. With PWS 2014 and release 8.1, attaching and viewing attachments has never been easier. Check out an engineering drawing on your desktop through PWS or let your customer see the same drawing through a web page. Also new in release 8.1 is the ability to link a directory to a master file item to solve the issue of having multiple things to attach. This session will explore how to make this magic happen.

**1:30 - 2:20 Sales Order Processing in Manage 2000 - Plaza 3**

*Vicki Gabler*

Sales order processing is one of the more complex modules in the Manage 2000 software. When tied to Sales Quotes, EDI, Credit Cards and Accounts Receivable, it is a huge process to understand. In this session, Vicki will give you a high level overview of the capabilities Sales Order Processing offers you. These are procedures that you may not know about, or new capabilities to procedures that you've been using for years. Reclaim and extend the functionality of the Sales Order Processing module.

**3:00 - 3:50 Implementing Systems Security - Plaza 4**

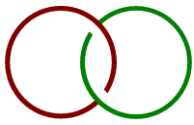
*Marc Harbeson, NovoRoi Systems*

Thirty years ago, a user could probably do anything he or she wanted to in the company computer system. In today's security conscious world, management and auditors are requiring much tougher security models. Manage 2000 allows a very robust security process using menu, function, task, and UniData verb level security implementations. Learn about the various methods available to keep prying eyes from your sensitive data. Tom Tont will also be on hand to offer insight and answer questions on how new technology can enhance your security needs.

**3:00 - 3:50 Credit Card Compliance in Manage 2000 - Plaza 3**

*Vicki Gabler*

The Credit Card industry has undergone extensive changes from the implementation of Payment Card Industry Data Security Standards (PCI DSS). Manage 2000 provides a Credit Card module which allows users to meet these demanding needs. There are serious risks from both a legal and data security nature when not meeting good PCI practice. Vick Gabler explains the Credit Card Compliance process and how to meet these needs with Manage 2000. Protect your system and implement proper PCI DSS.



## Monday, October 9<sup>th</sup>

### 4:00 - 4:50 **Real-Time Storefront, Portal, Sales Tax & Credit Card Solutions for Manage 2000 - Plaza 3**

*Paul Batten, AdvancedWare*

AdvancedWare Corporation has been an Epicor Partner for over 10 years and has developed a number of solutions integrated in Real-Time with MANAGE 2000. In this session we will cover the following:

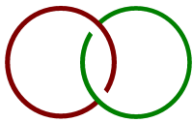
1. Storefront (AWWebStore): AWWebStore will enable your Customers (B2B and B2C) and Employees (on behalf of Customers) to purchase your products via your web site.
2. Portal (AWWebPortal): AWWebPortal will enable your Customers and Employees (on behalf of Customers) to view M2k data from Sales Order Status, Shipment Information, Invoices/Statements, and RMA Tracking with AWWebPortal.
3. Electronic Forms (AWForms): With AWForms your M2K System will produce the most advanced and professional forms possible. Forms can be emailed, printed, automatically archived, and/or faxed. Barcodes (39, 128, UPC, 2 Dimensional) on the forms and labels are a snap with AWForms.
4. Automatic Sales Tax (AWSalesTax). AWSalesTax fully automates the Sales Tax process for M2K. With AWSalesTax you don't need to pre-load or maintain any tables on your system because AWSalesTax uses Real-Time Web Services Technology to calculate the taxes.
5. Credit Card processing (AWCreditCard). When entering Orders in M2K, AWCreditCard will automatically validate the Card Information and perform the Authorization Transaction (reserves the funds) for the amount of the Order. When you Invoice in M2K, AWCreditCard automatically charges the Card for the actual Invoice amount with full PCI compliance.

### 4:00 - 4:50 **Software Quality & Testing Strategies - Plaza 3**

*Susan Joslyn, SJ+ Systems Associates, Inc.*

Testing is fun. Tested software is even more fun. Come explore various styles and means of testing software, ensuring quality and generally helping everyone have more fun. Susan will talk about realistic testing, getting started with testing, taking some next steps if you are ready, and the pros and cons and how-tos of automated testing. Bring your ideas, frustrations and questions for how to plan the plan and process the process with Susan and learn how to arrive a true, quality assured result for your software systems.





## Tuesday, October 10<sup>th</sup> - NUGM Conference Sessions

### 8:30 - 10:20 **NovoNexus - Warehouse Barcoding Solution - Plaza 4**

*Team Novo*

The NovoNexus Warehouse Management System is designed to operate in concert with the Manage 2000 Automatic Data Input (ADI) Module. The NovoWMS is also a versatile database for tracking and reporting inventory information in its own right. Marc will show the general process of interfacing to the M2k ADI module as well as some techniques for utilizing the NovoWMS database as a basis for reporting and tracking the movement of critical data and operations in the warehouse environment.

### 8:30 - 9:20 **User Experience Changes Over Manage 2000 Releases - Plaza 3**

*Peter Newby, Epicor Software*

Manage 2000 client server applications have been removed from the system. In their place are over 350 web pages. The robust set of Manage 2000 web pages cover most of the common inquiries in the system. Come to this session to see what a user of earlier Manage 2000 releases will experience when release 8.1 is installed. Check out the new capabilities including PWS changes and running Manage 2000 web pages on a tablet.

### 9:30 - 10:20 **Manage 2000 Release 8.1 Overview - Plaza 3**

*Doug Farmer & Peter Newby, Epicor Software*

Manage 2000 release 8.1 is available for installation. Release 8.1 includes features that enable mapping, PDF printing and web access, including the ability to access Manage 2000 on hand held devices. This session is an overview of these new features and a discussion on the reasons to invest in upgrading your software.

### 9:30 - 10:20 **Building Financial Statements - Plaza 3**

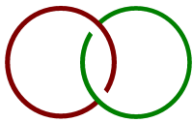
*Scott Marich, NovoRoi Systems*

Financial Statements are the most important reports that IT systems produce. Manage 2000 has a strong financial reporting system that can meet all the necessary statement requirements. Scott Marich is an expert with procedures and steps to produce good and accurate financial statements. Join Scott in this exploration of the statement reporting process and learn the necessary procedures to make producing your financials a professional and stress free process.

### 10:30 - 11:20 **PRC - Introduction for New or Prospective PRC Users - Plaza 4**

*Susan Joslyn, SJ+ Systems Associates, Inc.*

PRC is a software development life-cycle management tool that is written in and for the MultiValue (Unidata/Universe/D3) environment. It has everything you need to completely automate and streamline the software life-cycle and your audit requirements. From managing requests through scheduling resources, managing change, testing and delivery (plus rollback) of software, PRC has what you need, specifically for your Avante, Manage 2000, Manfact and Prelude ADS environments.



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### 10:30 - 11:20 **CSI M2k Style: Auditing and History Functions - Plaza 3**

*Joanne Eckenrode, NovoRoi Systems*

Many times a user or manager asks the question, "How did this happen, or who made this transaction?" Inside Manage 2000 are many fields that track user or function history. While we cannot go back to the Big Bang, we can look at what has happened recently in Manage 2000. Learn about functions, data files and tricks to investigate historical events. The forensic evidence is there; learn how to root it out!

### 12:30 - 1:20 **Rocket Software Audit Logging - Plaza 4**

*Larry Schoenleber, Rocket Software*

### 12:30 - 1:20 **M2k Express Access Database GUI - Plaza 3**

*Justin Kobylarz, Pflow Software*

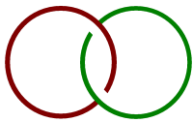
M2K Express is a custom Microsoft Access GUI that leverages the power of SQL and NovoMotion to unlock and beautifully display your data in real time. Pflow's environment has almost 300,000 IM items, and ~300 IM.UDEF fields. Multiple files are brought over from M2K (IPL, IM, IM.UDEF, SOH, SOH\_UDEF, SOD, CM, CONTACT\_MASTER, SQH, and some TM Files!). The SQL view that harnesses this data also contains legacy (pre-M2K) data. This interface allows for seamless access to all product information as well as powerful search and filter tools to slice and dice data by multiple fields! During this session, Justin will demonstrate the unique ways you can deliver this data and tailor it to each department within your company, such as generating job information sheets for field service, providing check lists for engineering, and sending open case E-Mails. Justin will also show how this GUI provides many powerful direct links to information contained in the standard M2K web portals, which has several significant advantages! [Licenses!] Additionally, Pflow uses the interface to build SQL tables for collection of customer service, internal, and shipping information. Come see how they disseminate all this information over a large percentage of their workforce with ease!

### 1:30 - 2:20 **Manage 2000 Wizard Panel: Anything Goes - Any Question - Any Topic - Plaza 4**

*All Wizards*

The Manage 2000 development team and Team Novo are on hand in an open forum atmosphere to answer questions you have regarding capabilities provided by Manage 2000 and NovoRoi Systems software products. Occurring about halfway through the NUGM conference, this session gathers everyone together to take a breather, get the lay of the land, and discuss general topics, impressions, problems or ideas. No question is too minor or too far out. Our panel will attempt to answer all questions, or work to get an answer to you as soon as possible. Don't miss this opportunity to meet the panel face to face. All participants can be on deck for questions and answers in an open, sharing format.

### 3:00 - 3:50 **TBA - Plaza 4**



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## Tuesday, October 10<sup>th</sup>

### 3:00 - 3:50 **Manage 2000: A Path Forward - Plaza 3**

*Christine Hansen, Epicor Software*

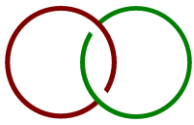
Yes, there is a road map for Manage 2000 development. Epicor software remains committed to servicing and developing the application system that is M2k. Christine will utilize this session to present Epicor's plan for an M2k path forward and lead a user Q and A session.

### 4:00 - 4:50 **TBA - Plaza 4**

### 4:00 - 4:50 **Replenishment Cycle: From Demand to Payment - Plaza 3**

*TinaMarie Leeman, Sparks Belting Company*

In this session we will cover the process from Sales Order Entry to WIP Receipts. We will include the various ways to enter a purchase order and work orders. These processing applications are individually involved, with multiple configuration options. Additionally, TinaMarie will go through an explanation of some accounting steps resulting from the workflow in order to properly account for costs, time and material. This session is a great way to learn how the various steps affect each department.



## Wednesday, October 11<sup>th</sup> - NUGM Conference Sessions

### 8:30 - 9:20 **NovoSQ & Web Order Processing - Plaza 4**

*Lisa Petro, SPEX CertiPrep*

View the steps and results from a user implementation of Web Order Processing. NovoMotion is used for real-time ERP-to-web population of part, pricing and customer data. The NovoSQ product is utilized for creation of sales orders or quotes from the web orders. Watch Lisa dazzle you with her fully-automated Web Order process.

### 8:30 - 9:20 **Setting Up External Portal Access - Best Practices - Plaza 3**

*Peter Newby, Epicor Software*

The Manage 2000 website is designed for both internal employee use and external partner access via the World Wide Web. Website features may be configured by user role providing internal users, customers, vendors, and sales reps, each with their own distinct web sitemap and navigation experience. Now that you are using Manage 2000 web pages internally, see how these same web pages can serve the needs of your customers, sales reps, and vendors.

### 9:30 -10:20 **Normalized Cost Accounting - Plaza 4**

*Scott Marich, NovoRoi Systems*

Manage 2000 utilizes numerous principles to establish true manufacturing costs. The modes and methods of these custom processes are well documented within the system and they all have one thing in common: they are a cost averaging equation that is applied over time. The Normal Cost Accounting system developed by Scott upon customer request differs in that it will establish a Normal Cost Accounting immediately as a work order is received and closed. This powerful process allows for a significantly quicker accounting application of labor, outplant processing, and time and material to the cost of inventory on hand. If your accounting team needs a more timely cost analysis, Scott's program gives them that much desired option.

### 9:30 -10:20 **Overview of Web Navigation/Configuring Web Menus - Plaza 3**

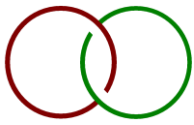
*Linda McHenry, LJM Services*

Manage 2000 web portals provide a fast, easy, flexible way to keep your users informed about business transactions and on-going events. Whether your users are local, at remote offices, customer sites, or around the world, Web navigation is already familiar to the average user and Manage 2000 web content navigation may be tailored to match the different workflow needs for various user roles. This session explores ways to make information available based on these functional user roles.

### 10:30 - 11:20 **Interactive Capacity Planning and Load Leveling - Plaza 4**

*Lane Johnson, Carter Day International*

The Manage 2000 Capacity Requirements Planning module has the ability to do department and work center reporting and graphing. Up until now drill downs from a department graph into the detail level have been good enough, but Carter Day needed more and faster functionality to quickly graph load against capacity. Carter Day accomplishes this by



## Wednesday, October 11<sup>th</sup>

splitting Planned, Released and Simulated load into graphical segments. Using NovoMotion and SSRS, Carter Day is able to view the graphs at the department or work center level, make released/planning/simulation changes on the M2K host, then refreshing the view in real-time to see the graphical impact of the changes.

### 10:30 - 11:20 **Navigation in Manage 2000: Things You Maybe Didn't Know - Plaza 3**

*TinaMarie Leeman, Sparks Belting Company*

Whether you are new to M2K or an experienced user, there are some very cool features in navigation to show during this session. This includes copy/paste features, looking up things with search features (a few pointers here can go a long way), and getting yourself out of trouble. All *things* in this session apply to regular users!

### 12:30 - 1:20 **Manage 2000 Purchasing Module Exposed- Plaza 4**

*Vicki Gabler*

The Manage 2000 Purchasing module was designed to meet the various generic needs of any procurement department in a company using the ERP system. It can be a very distinct purchasing system or a very complex and highly scheduled procurement system. Vicki Gabler utilizes her experience as a developer and designer to explore and explain the distinctions of this complex system.

### 12:30 - 1:20 **The New EpiCare Customer Portal- Plaza 3**

*Doug Farmer, Epicor Software*

Over the past year, Epicor has merged dozens of customer portals into a single portal using the Service Now platform. Find out how you can enter cases, add documentation to a case, and search our knowledge base of over 2,000 articles. See how to tailor the interface and those many emails to what works just for you.

### 1:30 - 2:20 **Manage 2000 Accounts Payable Module Exposed- Plaza 4**

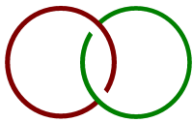
*Vicki Gabler*

Accounts Payable processing is usually regarded as a necessary evil. There are best practices to be employed with any professional AP system, but a good AP procedure will take some of the sting out of what is ultimately a negative cash equation. Vicki Gabler illustrates and explains the merits of these best practices when utilizing the Manage 2000 Accounts Payable module. The AP process need not be a scary, dark adventure. With Vicki as your guide, you will see the AP module exposed to the light of day where it is understandable and fully functional. AP can be a positive part of your accounting procedures and Vicki will help you explore that possibility.

### 1:30 - 2:20 **Web Development Topics - Plaza 3**

*Peter Newby, Epicor Software*

Development Tools are integral to the Manage 2000 DNA. This is as true for the later web technology as it is with the classic Multi-Value based Manage 2000 technology. The toolsets exist for development in the field just as much as development inside EPICOR. Come find out about the Manage 2000 web toolset. Get ideas about how to leverage the built-in web tools to create Manage 2000 style web content faster, extending Manage 2000 web functions with like materials and construction techniques.



NovoRoi Systems, LLC

# Novo User Group Meeting 2017 Agenda

October 8 - 13<sup>th</sup> - DoubleTree by Hilton Bloomington - Minneapolis South

## Wednesday, October 11<sup>th</sup>

**3:00 - 3:50      How to Excel in Manage 2000- Plaza 4**

*Linda McHenry, LJM Services*

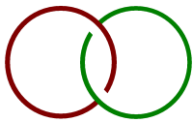
Microsoft Excel provides fast, flexible data access and analysis. There are many ways to get your ERP data from Manage 2000 into Microsoft Excel. This session reviews some ways you may be familiar with and perhaps some ways you are not.

**3:00 - 3:50      TBA - Plaza 3**

**4:00 - 4:50      Closing Comments on NUGM Conference Sessions and General Discussion**

**Plaza 4**

*TeamNovo*



## Thursday, October 12<sup>th</sup> - NUGM Interactive Labs

### 8:00 – 12:00 **Web Administrator Tasks – Vista 2202**

*Linda McHenry, LJM Services & Peter Newby, Epicor Software*

In this lab participants will gain practical experience carrying out Manage 2000 website administration tasks. Users will have hands-on experience with some of the built-in administration monitoring tools. There will be opportunity to get comfortable making navigational changes, filtering content, and changing the user experience to improve your users' work life. After attending this lab, participants will be well practiced tailoring the Manage 2000 Web experience to meet user needs.

### 8:00 – 12:00 **MSO & REPORT BUILD – Vista 2204**

*Joanne Eckenrode, NovoRoi Systems*

The very robust Manage 2000 toolset includes a cornucopia of functions that allow a power user to make the system sing. We will focus on the Report Build and MSO tools. REPORT.BUILD can be used to create extremely simple or very complex reports that can then be either sent to a printer, Excel, EOT, or the web. We will create simple reports for each of these output types and compare the results. The MSO.BUILD function provides a comprehensive method for creating software applets (MSOs). These MSOs can then be tied to screens to enhance the end-user experience and allow for a more workflow-centered approach to any job function within the Manage 2000 software.

### 1:00 – 5:00 **SSRS: SQL Server Reporting Services – Vista 2202**

*Marc Harbeson, NovoRoi Systems*

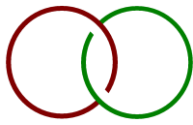
Everyone with a SQL server has a powerful reporting engine at their fingertips. This lab will instruct you on how to utilize M2k data in SQL Server Reporting Services. We have heard people describe the SSRS module as a big brother addition to Excel. While this is certainly true, in a sense, there are a number of additional features in the SSRS suite that make it much more than a just a reporting solution. Marc will lead class participants in investigating building and using the reporting services and native web reporting repository to demonstrate the other powerful features of the products on real M2k derived data. Class participants will leave the class with hands-on knowledge of basic and advanced capabilities for using SSRS to report M2k data.

### 1:00 – 5:00 **Using UniQuery Effectively – Vista 2204**

*Trey Miller, NovoRoi Systems*

All of us who use one of Epicor's U2 based ERP solutions know that the database engine underlying the application software is a powerful data organization tool. In the case of Manage 2000, the UniData database provides that foundation. This lab session is an exploration of the query language that accompanies the UniData database.

UniQuery is, itself, a powerful and fully functional set of database query tools. In this lab Trey will guide you through real and practical use cases for the most common and useful query verbs and well as some of the more esoteric and functional ones. Participants to this lab will leave with practical experience and functional use case notes to take back to the work place and immediately put UniQuery to work for you mining and exposing your Manage 2000 data.



## Friday, October 13<sup>th</sup> - NUGM Interactive Labs

### 8:00 - 12:00 **FORM BUILD - Vista 2202**

*Joanne Eckenrode, NovoRoi Systems*

Even Manage 2000 customers with little customization often have their customer-facing forms modified. We will review simple FORM.BUILD modifications and discuss some customization best practices. We will cover sorting, as well as adding and removing fields. Bring your experiences and your questions to this one!

### 8:00 - 12:00 **NovoMotion Use Case, Debugging & Correcting - Vista 2204**

*Trey Miller, NovoRoi Systems*

This lab is a hands-on use case using NovoMotion to build a database in SQL Server from more complex Manage 2000 data. We've given labs for building databases with NovoMotion in the past as a rudimentary exercise. This lab will extend those initial investigations as well as focus on the process and tools for debugging and correcting SQL data errors.

The UniData database is distinct from modern hierarchical databases in that it allows data in almost any format to exist almost anywhere in the database. This is known as not strongly typed data. SQL, on the other hand, is a very strongly typed system and SQL importing errors usually result from resolving these data inconsistencies.

Participants in this lab will leave with a strong set of tools and procedures to debug and correct.

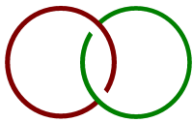
### 1:00 - 5:00 **ECA Workflow - Vista 2202**

*Marc Harbeson, NovoRoi Systems*

The Manage 2000 Event, Condition, Action (ECA) processor is an incredibly powerful processing tool. We know the most common result is a simple email notification, but it can do so much more than that. This lab is an exploration towards utilizing the ECA system as a business workflow design and control system.

Marc will lead hands-on instruction in setting up a series of procurement work flows as an example for automated purchasing considerations. Workflow action events will be sequenced to show automation from Requisition to Purchase Order creation with the addition of necessary critical approval steps in between. This exploration will be somewhat specific to purchasing activities but also an excellent indicator of workflow design concepts. As the next lab exercise, Marc will demonstrate how those workflow creation techniques translate to item creation and approval controls surrounding sign-off for product requirements before the new items are released as active. These lab explorations should give participants a good working knowledge of how to apply ECA workflow concept to almost any M2k business circumstance.





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# Novo User Group Meeting 2017 Agenda

October 8 - 13<sup>th</sup> - DoubleTree by Hilton Bloomington - Minneapolis South

## Friday, October 13<sup>th</sup>

### 1:00 - 5:00 **Web Developer Tasks - Vista 2204**

*Peter Newby, Epicor Software & Linda McHenry, LJM Services*

There have been numerous changes to the Manage 2000 web pages and infra-structure in the last few releases. The toolset available to web developers has grown with each of these releases.

Try your hand at creating new web content for Manage 2000 at 8.1. From simple report writer based content to complex ASP.NET and BTO development tasks, explore as far as time permits. Our experts will be on hand to assist and applaud.