

NovoRoi Systems, LLC

# Novo User Group Meeting 2019 Agenda

October 7 - 11<sup>th</sup> - Oak Ridge Hotel & Conference Center - Chaska, MN

## Sunday, October 6 NUGM 2019: Interactive Labs

<b>4:00 - 6:00</b>	<b>NUGM Interactive Lab Check-in</b> -Lobby Pick up your credentials and conference materials
<b>6:30 - 8:00</b>	<b>Dinner</b> - Seasons Restaurant (Start of Overnight Package for Interactive Lab Attendees)

## Monday, October 7 NUGM 2019: Interactive Labs

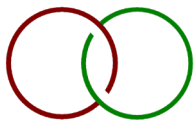
	Room 200	Room 204
<b>6:30 - 8:00</b>	<b>Breakfast Buffet</b> - Seasons Restaurant	
<b>8:00 - 12:00</b>	<b>A Day in the Life of Order to Cash: Part 1</b> Marc Harbeson, NovoRoi Systems	<b>NovoMotion: Use Case Lab with Tips &amp; Tricks</b> Trey Miller, NovoRoi Systems
<b>12:00 - 1:00</b>	<b>Lunch</b> - Seasons Restaurant	
<b>1:00 - 5:00</b>	<b>A Day in the Life of Order to Cash: Part 2</b> Marc Harbeson, NovoRoi Systems	<b>Manage 2000 Pot Luck</b> Linda McHenry, LJM Services
<b>5:30 - 6:30</b>	<b>Cocktail Hour</b> - Solarium	
<b>6:30 - 8:00</b>	<b>Dinner</b> - Seasons Restaurant	

## Tuesday, October 8 NUGM 2019: Interactive Labs

	Room 200	Room 204
<b>6:30 - 8:00</b>	<b>Breakfast Buffet</b> - Seasons Restaurant	
<b>8:00 - 12:00</b>	<b>SSRS: Creating Dashboards and Widgets</b> Marc Harbeson, NovoRoi Systems	<b>Working with Json in M2k and UniData</b> Trey Miller, NovoRoi Systems
<b>12:00 - 1:00</b>	<b>Lunch</b> - Seasons Restaurant	
<b>1:00 - 5:00</b>	<b>M2k as a Graphical Service to SQL Server Backend</b> Trey Miller, NovoRoi Systems	<b>Accessing Manage 2000 with Visual Studio Tools for Office</b> Peter Newby, Epicor Software

## Tuesday, October 8 NUGM 2019: Conference Sessions

<b>3:00 - 5:00</b>	<b>NUGM Conference Sessions Check-in</b> -Lobby 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> Piano Lounge
<b>6:30 - 8:00</b>	<b>Dinner</b> - Seasons Restaurant (Start of Overnight Package for NUGM Conference Session Attendees)



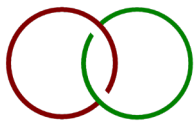
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## Wednesday, October 9 NUGM 2019: Conference Sessions

6:30 – 8:30	<b>Breakfast Buffet</b> – Seasons Restaurant		
8:00 a.m. – 4:00 p.m.	<b>Vendor Exhibitions</b> – 2 <sup>nd</sup> Floor Kiosk		
8:30 – 9:20	<b>Welcome Address</b> - Room 208 Trey Miller, NovoRoi Systems		
	Room 208	Room 204	Room 200
9:30 – 10:20	<b>Manage 2000 8.1 Release Overview</b> Doug Farmer & Peter Newby, Epicor Software	<b>NovoMotion: What's New</b> Team Novo	<b>Vendor Presentation Red Leaf Roadmap</b> Kevin King, Precision Solutions
10:30 – 11:20	<b>M2k Architectural Overview</b> Doug Farmer, Epicor Software	<b>EDI Basics with M2k</b> Joanne Eckenrode, NovoRoi Systems	<b>Prelude Presentation Getting the Most from Operational Metrics</b> TJ White, Massco
11:30 – 12:30	<b>Lunch</b> – Seasons Restaurant		
12:30 – 1:20	<b>M2k Navigation: General Intro</b> Linda McHenry, LJM Services	<b>PDF Printing with M2k</b> Doug Farmer, Epicor Software	<b>Vendor Presentation Implementing Micro Solutions Using the Red Leaf Infrastructure</b> Kevin King, Precision Solutions
1:30 – 2:20	<b>M2k System Admin for Dummies</b> Bud Brown, Epicor Software	<b>CTO: High-level Overview</b> TinaMarie Leeman, Sparks Belting Company & Dynamic Conveyor Corporation	<b>Vendor Presentation PRC for You and U2</b> Susan Joslyn, SJ+ Systems Associates
2:30 – 3:00	<b>Break</b> – 2 <sup>nd</sup> Floor Refreshment Kiosk		
3:00 – 3:50	<b>UniQuery: UniData Query Language Basics</b> Linda McHenry, LJM Services	<b>SQL Maintenance Concepts and Application</b> Chad Linderman, Comtech EF Data	<b>Vendor Presentation Real-Time Storefront, Portal, Forms, Sales Tax &amp; Credit Card Solutions for M2K</b> Paul Batten, AdvancedWare
4:00 – 4:50	<b>UniData Files/64 Bit Files</b> Bud Brown, Epicor Software	<b>BTO Posting Function Wizard for Visual Studio</b> Peter Newby, Epicor Software	<b>Vendor Presentation Streamline M2k Data Analysis Workflows with Informer</b> Doug Leupen, Entrinsik
5:30 – 6:30	<b>Cocktail Hour - Sponsored by ONgroup Intl.</b> Piano Lounge		
6:30 – 8:00	<b>Dinner</b> - Seasons Restaurant		



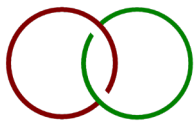
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## Thursday, October 10 NUGM 2019: Conference Sessions

6:30 – 8:30	<b>Breakfast Buffet</b> – Seasons Restaurant		
8:00 a.m. – 4:00 p.m.	<b>Vendor Exhibitions</b> – 2 <sup>nd</sup> Floor Kiosk		
	Room 208	Room 204	Room 200
8:30 – 9:20	<b>NovoWMS: What’s New</b> Team Novo	<b>Sales Consignment Overview</b> Vicki Gabler	<b>Vendor Presentation</b> <b>Improving Prelude and Support Staff Performance</b> Grant Hart & Perry Stauffer, ONgroup Intl.
9:30 – 10:20	<b>Physical Inventory: M2k &amp; NovoNexus</b> Marc Harbeson, NovoRoi Systems	<b>Year-end M2k Administration Processing</b> Doug Farmer, Epicor Software	<b>Vendor Presentation</b> <b>NovoMotion for U2 Systems SQL Interface</b> Trey Miller, NovoRoi Systems
10:30 – 11:20	<b>Manage 2000: Path Forward</b> Frank Rumbawa, Epicor Software		<b>Prelude Presentation</b> <b>The Good, the Bad, and the Awesome of Web APIs</b> Charles Skopp, Veterinary Service
11:30 – 12:30	<b>Lunch</b> – Seasons Restaurant		
12:30 – 1:20	<b>Printing Directly from M2k to a Zebra Label Printer</b> Jeremy Wallender, WCCO Belting	<b>Year-end Processing for Accounting</b> Vicki Gabler	<b>IT Security/IT Governance</b> Susan Joslyn, SJ+ Systems Associates
1:30 – 2:20	<b>Manage 2000 Wizard Panel</b> – Room 208		<b>Prelude Presentation</b> <b>The Opportunity Tracker</b> Bob Brackbill, Griffin Greenhouse
2:30 – 3:00	<b>Break</b> – 2 <sup>nd</sup> Floor Refreshment Kiosk		
3:00 – 3:50	<b>MSOs in Web Functions</b> Peter Newby, Epicor Software	<b>RMA: General Use Case</b> TinaMarie Leeman, Sparks Belting Company & Dynamic Conveyor Corporation	<b>Vendor Presentation</b> <b>Central Restaurant Products: A Case Study</b> Grant Hart & Perry Stauffer, ONgroup Intl.
4:00 – 4:50	<b>ECA Message Content</b> Linda McHenry, LJM Services	<b>Purchasing Module Capabilities</b> Vicki Gabler	<b>Vendor Presentation</b> <b>PowerBI for Prelude Users</b> Dick Thiot, Maverick Systems
5:30 – 6:30	<b>Cocktail Hour</b> – Lakeside Patio		
6:30 – 8:00	<b>Dinner</b> – Seasons Restaurant		



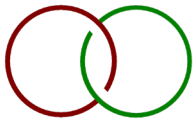
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## Friday, October 11 NUGM 2019: Conference Sessions

6:30 - 8:30	<b>Breakfast Buffet</b> - Seasons Restaurant		
8:00 a.m. - 12:00 p.m.	<b>Vendor Exhibitions</b> - 2 <sup>nd</sup> Floor Kiosk		
	Room 208	Room 204	Room 200
8:30 - 9:20	<b>NovoFusion with PLM Focus</b> Team Novo	<b>Database Admin/Keeping Your Database Clean</b> Doug Farmer, Epicor Software	<b>Vendor Presentation</b> <b>Enabling Prelude as .Net on SQL Server and Replacing SB+ with NetBuilder</b> Grant Hart & Perry Stauffer, ONgroup Intl.
9:30 - 10:20	<b>MRP Survey</b> Marc Harbeson, NovoRoi Systems	<b>Web Security Topics</b> Peter Newby, Epicor Software	<b>Code Review and Coding for Testing</b> Susan Joslyn, SJ+ Systems Associates
10:30 - 11:20	<b>Forecasting Overview</b> Marc Harbeson, NovoRoi Systems	<b>Extending Manage 2000 Access Beyond PWS</b> Peter Newby, Epicor Software	<b>Vendor Presentation</b> <b>A Year of Cool (What We've Done This Year)</b> Kevin King, Precision Solutions
11:30 - 12:30	<b>Lunch</b> - Seasons Restaurant		
12:30 - 1:20	<b>MPS Overview</b> Marc Harbeson, NovoRoi Systems	<b>General Survey of API Integrations</b> Trey Miller, NovoRoi Systems	<b>Vendor Presentation</b> <b>Introduction to Odoo</b> Jeff Mueller, Precision Solutions
1:30 - 2:20	<b>Closing Comments on NUGM Conference Sessions and General Discussion</b>		<b>Prelude Presentation</b> <b>Closing Comments</b>
2:30 - 3:30	<b>Break</b> - 2 <sup>nd</sup> Floor Refreshment Kiosk <b>Bar</b> - Room 210		



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## Monday, October 7<sup>th</sup> - NUGM Interactive Labs

### 8:00 – 12:00 **A Day in the Life of Order to Cash: Part 1 - Room 200**

Marc Harbeson, NovoRoi Systems

This is part one of a two-part lab. In this lab we will walk through the various Manage 2000 functions from Sales Order Entry to Accounts Receivable (including cash application), and everything in between. As we take our journey we will stop along the way to review how different Master Records (Item, Customer, Vendor) and system constants are impacted by the process flow.

This morning session will focus primarily on the following Manage 2000 functions:

- The customer facing side of Manage 2000 (SOP, MFG, AR)
- Internal order fulfillment (REP / WIP).

### 8:00 – 12:00 **NovoMotion: Use Case Lab with Tips & Tricks - Room 204**

Trey Miller, NovoRoi Systems

NovoMotion has been around for 12 years now. It doesn't seem that long, but it is. As such, our users have reminded us that some of the original folks who received the installation training are departed and the new crew needs to know the basics. This lab is dedicated to those basics and a smidge of intermediate stuff as well. Users will cover the concepts of SQL database creation and beginning to populate those databases with Manage 2000 data in real-time application. Creating SQL tables and NovoMotion Schema to support the real-time update of those tables will enable users to grasp a full understanding for the power of a real-time interface from almost any data structure in the Manage 2000 ERP to a corresponding data structure in Microsoft SQL Server. If you have beginning users or even intermediate users who want to see some of the latest NovoMotion development in a hands-on lab environment, don't miss this opportunity!

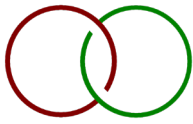
### 1:00 – 5:00 **A Day in the Life of Order to Cash: Part 2 - Room 200**

Marc Harbeson, NovoRoi Systems

This is part two of a two-part lab. In this lab we will walk through the various Manage 2000 functions focused on Inventory Management, Purchasing, and Manufacturing concepts, including Accounts Payable. Again, as we take our journey we will stop along the way to review how different Master Records (Item, Inventory Planning) and system constants are impacted by the process flow. Manufacturing plans which include item forecasts will be investigated as part of planning procedures.

This afternoon session will focus primarily on the following Manage 2000 functions:

- The supply facing side of Manage 2000 (PUR, MRP, FCST, AP)
- Inventory management (INV / PCON, etc.)



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### 1:00 - 5:00 **Manage 2000 Pot Luck - Room 204**

Linda McHenry, LJM Services

This is a good basic session for Manage 2000 beginners and intermediates who want to acquaint, re-acquaint, or simply become familiarized with general Manage 2000 concepts. The Manage 2000 tool set has become quite broad over the years and this lab will give users a hands on approach to many of the data presentation systems available, ranging from the classic M2k reporting systems to modern web tools.

This lab will include the following topics:

- Exploring the roles of various M2K tools in developing reports
- Creating File Update Functions with SCREEN.BUILD and MT500
- Modifying Web Navigation and Web Page Content
- Using Manage 2000 Project Wizards in Visual Studio

## Tuesday, October 8<sup>th</sup> - NUGM Interactive Labs

### 8:00 - 12:00 **SSRS: Creating Dashboards and Widgets - Room 200**

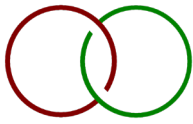
Marc Harbeson, NovoRoi Systems

In this lab we will review our normal SQL Server Reporting Services (SSRS) topics. This includes general information such as how to write a report, subscriptions, and snapshots. Additionally this lab will explore everything related to using an SSRS instance to write, publish, and consume SQL reports. Finally, we will take this basic knowledge and extend it by creating a company dashboard to display several key areas of the business such as Open AR, Open Orders, Inventory Turns, and Sales History. These Key Performance Indicators (KPIs) will be developed along the way. We will express these measures in a GUI dashboard with click-through, drill-down capability to show the detail behind each widget in the dashboard. This lab ultimately instructs users to present Manage 2000 data as KPIs using the native tools that are delivered with SSRS.

### 8:00 - 12:00 **Working with Json in M2k and UniData - Room 204**

Trey Miller, NovoRoi Systems

Users will be introduced to techniques for working with Manage 2000 and UniData data in JavaScript Object Notation (JSON) format. JSON is an important data description object concept that is heavily utilized in modern APIs to transmit all forms of data. The usual issues in dealing with U2 and Manage 2000 data involve finding ways to mitigate the nested, multi-valued nature of the U2 database design. JSON handles the multi-dimensionality of U2 data as a native offshoot of its data object definition structure. This lab will be both an introductory and intermediate exploration for describing U2 data in JSON notation. Lab users will work with custom software programs to both produce and consume JSON data content and leave with usable programming examples to use in the real world.



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### 1:00 - 5:00 **M2k as a Graphical Service to SQL Server Backend - Room 200**

Trey Miller, NovoRoi Systems

Sometimes new development does not have to involve expensive developer and software investments in brand new software development kits (SDKs). There are times when wholly new graphical interfaces are necessary and then there are times when an existing user base simply needs a mode and method to update a SQL server data instance without introducing entire new application systems. In that regard, the Manage 2000 application development toolset is an extremely versatile, mature and stable application design framework. In a sense, the M2k toolset can be utilized as a Rapid Application Development (RAD) platform, which allows users to quickly flesh out a development project for user input to both M2k and SQL server. We will use this lab to model a basic Customer Relationship Management (CRM) development project to illustrate the power of M2k as a RAD when married with the NovoMotion real-time delivery to SQL on the back end of the database updates.

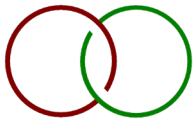
### 1:00 - 5:00 **Accessing Manage 2000 with Visual Studio Tools for Office - Room 204**

Peter Newby, Epicor Software

This lab will instruct users on utilizing the Visual Studio Tools for Office in order to access and manipulate Manage 2000 data directly on a Windows Workstation using the Office suite.

In this lab you will complete the following activities:

- Create a Manage 2000 Tab in Excel
- Use the VSTO Excel Sheet DOM to add new features
- Add interactive Manage 2000 validation to Excel sheet cell entry
- Create a feature which imports Manage 2000 Business Object data into Excel
- Create a feature which exports data from Excel Sheet to a Manage 2000 Business Object
- Add a simple cross referencing interface in the Excel Manage 2000 tab
- Create an Excel Actions pane with Manage 2000 awareness



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

**8:30 - 9:20 Welcome Address - Room 208**

Trey Miller, NovoRoi Systems

**9:30 -10:20 Manage 2000 8.1 Release Overview - Room 208**

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. We will also highlight product enhancements post 8.1 up through 8.1 service pack 3 which is currently available.

**9:30 -10:20 NovoMotion: What's New - Room 204**

Team Novo

NovoMotion 5.5 is the latest version of the NovoMotion product. This version includes updates to account for UniData's long awaited 64-bit architecture as well as changes to the delivery and update procedures, meeting Manage 2000 compatibility with the PRC module as well as incorporating delivery and installation in the Epicor Avante ERP system. NovoMotion 6.0 is the current development version with significant changes proposed to stay current and increase capabilities for data exchange between U2 Systems and SQL.

**9:30 -10:20 Vendor Presentation: Red Leaf Roadmap - Room 200**

Kevin King, Precision Solutions

As Red Leaf approaches its 10<sup>th</sup> birthday, we'll talk about where we've been and what we're doing to enhance and expand on this awesome web portal for Prelude.

**10:30 - 11:20 M2k Architectural Overview - Room 208**

Doug Farmer, Epicor Software

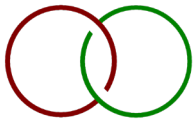
Why is Manage 2000 laid out the way it is? Find out the reason behind some of the weird and wacky ways Manage 2000 is put together. Forty years ago the world was a different place. Manage 2000 had 146 functions (in total!). Without the tools of today, developers had to invent ways to do even the most mundane tasks (system backups, spooled job handling). As time marched on, more functionality meant more changes. Sometimes they dovetailed into existing code, sometimes a cowboy arose and did something completely different. In this session, we will try to explain the why behind the how. It should be fun!

**10:30 - 11:20 EDI Basics with M2k - Room 204**

Joanne Eckenrode, NovoRoi Systems

Electronic Data Interchange (EDI) is a system "standard" for automatically communicating data between interested parties. The EDI standard is ANSI X12, developed by the Data Interchange Standards Association (DISA). One of the oldest jokes in IT that EDI is standard in any regard because of the myriad different ways that end users and Trading Partners alike will interpret the documentation. In this session, we will review the available Manage 2000 EDI transactions. We will discuss the general flow of the data, and provide a few tips and tricks for using the processes in the most efficient manner.





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### **10:30 – 11:20 Prelude Presentation: Getting the Most from Operational Metrics - Room 200** TJ White, Massco

In this session we'll look at operational metrics from a couple of different perspectives. First, we'll look at changes Massco has made to Credit Reason Codes to help identify where issues are occurring. Second, we'll discuss warehouse metrics (scan percents, average time to pick) to see how we use that information with a monthly scorecard.

### **12:30 – 1:20 M2k Navigation: General Introduction - Room 208** Linda McHenry, LJM Services

Whether you are new to Manage 2000, need to refresh your knowledge of basic navigation or want to see what's new in 8.1, this session is for you. We will cover topics related to navigating the Menu System, PWS Functions and Web Functions, as well as how to use features that are unique to Manage 2000 such as Backslash Commands, the EOTViewer, Cross-Referencing and the EpiEditor.

### **12:30 – 1:20 PDF Printing with M2k - Room 204** Doug Farmer, Epicor Software

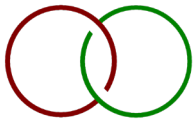
One of the most requested items in the Manage 2000 suggestion box was the ability to create PDF documents from Manage 2000 forms and reports. This capability is now built into the 8.1 release of Manage 2000. Any report, such as a trial balance, AR Aging, Sales Analysis report can be a PDF document simply by assigning output to a PDF form queue. Forms, such as Credit Memos, Purchase Orders, Statements, can be created as a PDF document and automatically attached to the master item. In this session, learn requirements for PDF printing, how PDF printing is setup, how to create a PDF document from a report or a form.

### **12:30 – 1:20 Vendor Presentation: Implementing Micro Solutions Using the Red Leaf Infrastructure - Room 200** Kevin King, Precision Solutions

One of the hidden gems of Red Leaf is how easy it is to create microservices to read and update information. In this technical session we'll build a simple microservice and show how easy it is to plug into the Red Leaf infrastructure.

### **1:30 – 2:20 M2k System Admin for Dummies - Room 208** Bud Brown, Epicor Software

In keeping with the popular "for Dummies" series of technical manuals, this session is not for dummies at all, but it is designed for administrators who need to know general Manage 2000 administration and best practices. This is a basics course for Technical and System Administration of M2K as well as a question and answer occasion with one of Epicor's most helpful helpline personalities. Don't miss this opportunity to meet Bud and get the low down on exactly what all M2k administrators need to know.



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### 1:30 - 2:20 **CTO: High-level Overview - Room 204**

TinaMarie Leeman, Sparks Belting Company & Dynamic Conveyor Corporation

The configurator is a powerful tool and you can be very creative in how it is used. You can use it to make your regular configurations, but you can also use it for creating service type items and use it in conjunction with Field Service and Depot Service. In addition, you can use it with other tools in M2K like ECAs, and managing purchased items. Come check it out!

### 1:30 - 2:20 **Vendor Presentation: PRC for You and U2 - Room 200**

Susan Joslyn, SJ+ Systems Associates

PRC is a software development life-cycle management tool written in and for your Epicor/U2 platform. This means that it manages upgrades, work that you do or have done to your system (customizations), and prevents your programmers from getting in each other's way. It includes a problem tracking system, resource/project management, source control (automatic), and deployment (with backups and recovery). Audit trail, reports and a clear, visible framework to see what your rules are and to show the auditors. Come learn (or learn more!) about what PRC can do for you.

### 3:00 - 3:50 **UniQuery: UniData Query Language Basics - Room 208**

Linda McHenry, LJM Services

Manage 2000 runs on a very versatile database called UniData. UniData is a multi-valued, nested database. The nature of the native multi-value and sub-value data cubing makes UniData an exceptional database for ERP software, but also makes it frequently challenging to investigate in an ad hoc fashion. For this purpose UniData provides its own query language called UniQuery. In this session we will dig deep into a range of topics such as Selecting data records, working with Lists, Reporting Options and Transforming and Exporting data. Many examples will be included.

### 3:00 - 3:50 **SQL Maintenance Concepts and Application - Room 204**

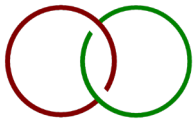
Chad Linderman, Comtech EF Data Corporation

SQL Maintenance. This isn't your old school batch & text files! Come learn about exciting features such as DBCC Checks, cleaning up Indexes/Statistics, Email Notifications & much, much more! Additionally, learn how to automate this process & how to use the SSMS Wizard for the low price of 1 hour of our time plus \$3 shipping and handling! Act now! Seats are limited to a first-come, first-served basis.

### 3:00 - 3:50 **Vendor Presentation: Real-Time Secure Access to M2K from Any Device Including Inventory Lookups, Storefront, and Portal - Plus Forms, Sales Tax, and Credit Card Solutions for M2K - Room 200** *Paul Batten, AdvancedWare*

Summary: 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. Orders, Customer Specific Pricing, etc. is all Real-Time integrated with M2K. AWWebStore is written in .NET and works on Smartphones and Tablets as well.



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2. Portal (AWWebPortal): AWWebPortal will enable your Customers and Employees (on behalf of Customers) to view Real-Time M2K information via your web site. Sales Order Status, Shipment Information, Invoices/Statements, and RMA Tracking are all provided with AWWebPortal, which is written in .NET and works on Smartphones and Tablets as well.

3. Electronic Forms (AWForms): With AWForms your M2K System will be producing the most advanced and professional forms possible. Forms can be Emailed in PDF or Word formats, Printed, Automatically Archived, and/or faxed. Barcodes (39, 128, UPC, 2 Dimensional) on the Forms and Barcoded labels are a snap with AWForms. Looking to produce Customer Specific Labels - handled easily with AWForms.

4. Automatic Sales Tax (AWSalesTax). AWSalesTax fully automates the Sales Tax process for M2K. When entering Orders in M2K, AWSalesTax automatically creates the needed codes (with the correct percentages). AWSalesTax also re-verifies the rates at the time of Invoice. 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. Note: This is accomplished without storing any Credit Card information which is important for PCI Compliance.

### 4:00 - 4:50 **UniData Files/64 Bit Files - Room 208**

Bud Brown, Epicor Software

With the release of Rocket Software's 8.1 version of UniData, a full 64-bit operating system is finally available to install and is fully supported by Manage 2000. Are you curious to learn about the new 64-bit files and dynamic file features that come with Unidata 8.1 and 8.2? Knowing how to work with 64-bit files relieves the need to utilize dynamic file structures in UniData. Not to worry if you do not currently run on UniData 8.1 or higher as this class also teaches dynamic file tuning for optimal performance.

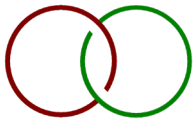
### 4:00 - 4:50 **BTO Posting Function Wizard for Visual Studio - Room 204**

Peter Newby, Epicor Software

Manage 2000 web tools include Visual Studio wizards which can save you countless hours when creating your web access to Manage 2000. These wizards generate functioning web projects based on UniData file dictionaries and Manage 2000 business objects. This session will provide a general background on the Manage 2000 wizards and take an in-depth look at the 8.1 version of the BTO Posting wizard.

### 4:00 - 4:50 **Vendor Presentation: Streamline M2k Data Analysis Workflows with Informer - Room 200** Doug Leupen, Entrinsik

Entrinsik has been offering information management solutions to organizations using MultiValue systems for over 30 years. With Informer, businesses using Manage 2000 alongside other data sources can aggregate disparate data using a single platform to create a cohesive, curated, governed data hub for self-service data analysis and collaboration within and across departments. Business users, data analysts and IT staff can generate reports and dashboards that consolidate real-time data to track and analyze key performance metrics. Modernize your ERP reporting and data analytics without losing the investment in your system.



NovoRoi Systems, LLC

# Novo User Group Meeting 2019 Agenda

October 7 - 11<sup>th</sup> - Oak Ridge Hotel & Conference Center - Chaska, MN

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

### 8:30 - 9:20 **NovoWMS: What's New - Room 208**

Team Novo

The NovoWMS suite of NovoNexus modules continues to expand. Where once it was simply an extension of the Manage 2000 Automated Data Input (ADI) module, it has become an inventory control database and application system in its own right. NovoWMS continues to be developed to meet the newer MANAGE 2000 ADI specifications. Join us for a demonstration of the system overall, including the new additions to inventory management capabilities such as Long Part Number (LPN)/Container Management, Inventory Cart Transportation, Sales Order Load Management, Work Order Workbench, and Alternative Production Component Unit of Measures.

### 8:30 - 9:20 **Sales Consignment Overview - Room 204**

Vicki Gabler

Manage 2000 handles both Purchasing consignment and Sales consignment. When dealing with consignment the ultimate question resides with who owns inventory and when does that inventory transfer to or from a business's books as well as who has physical control of the inventory over the life of the transaction. These can be challenging circumstances and Vicki will demonstrate the various ways that Manage 2000 can be used to deal with consignment inventory.

### 8:30 - 9:20 **Vendor Presentation: Improving Prelude and Support Staff Performance - Room 200**

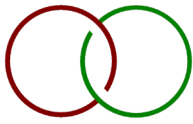
Grant Hart & Perry Stauffer, ONgroup Intl.

Come and discover how MVON# can dramatically improve the performance of your Prelude system using innovative new technologies, while retaining your valuable investment in your system. Topics include optimizing your Prelude system using features not previously available but all standard with MVON#, as well as the benefits of running your Prelude system on a modern, scalable and secure platform. In addition, multiple highly efficient GUI tools are available to find out where there are performance issues within your system.

### 9:30 -10:20 **Physical Inventory: M2k & NovoNexus - Room 208**

Marc Harbeson, NovoRoi Systems

In this session we will review how the Physical Inventory module in Manage 2000 works along with the NovoNexus WMS system in order to extend and enhance the Manage 2000 functionality. We will cover the various inventory counting options available at the current version of Manage 2000 and how they impact the PI process. We will also review the entire process from initialization, entry, reconciliation and finally committing the physical inventory upon acceptance.



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October 7 - 11<sup>th</sup> - Oak Ridge Hotel & Conference Center - Chaska, MN

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### 9:30 -10:20 **Year-end M2k Administration Processing - Room 204**

Doug Farmer, Epicor Software

Starting out a new year means starting fresh with Manage 2000. Whether it is a calendar year end or a fiscal year end, there are routines that should be done in Manage 2000 to transfer data into the coming year. Setting up new fiscal periods, resetting 1099 summarization are just a few of the functions that should be run. At a calendar year end, take advantage of the lite holiday season to perform yearly system maintenance. This session will cover the many annual functions that can be run when transitioning to a new year.

### 9:30 -10:20 **Vendor Presentation: NovoMotion for U2 Systems SQL Interface - Room 200**

Trey Miller, NovoRoi Systems

NovoMotion is a software product designed to help U2 administrators create real-time data interface to SQL server instances. NovoMotion supports Microsoft SQL Server, MySQL, and PostgreSQL databases with ODBC connectivity from the U2 environment. NovoMotion allows for and aids in the creation of data schema to detail mapping from U2 datafiles to multiple associated SQL datatables. The NovoMotion toolset automatically handles the creation of SQL tables and stored procedure systems to insure real-time updates between U2 and SQL databases. NovoMotion tools can save administrators hundreds of hours in development and design time to create real-time SQL databases for any number of 21st century development or reporting purposes.

### 10:30 - 11:20 **Manage 2000: Path Forward - Room 208**

Frank Rumbawa, Epicor Software

Manage 2000 Path Forward: A year in review, what's happening today, and the road ahead.

### 10:30 -11:20 **Prelude Presentation: The Good, the Bad, and the Awesome of Web APIs - Room 200**

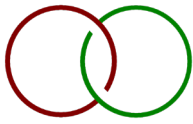
Charles Skopp, Veterinary Service, Inc.

In this technical session we'll investigate the whats, whys, and hows of developing web APIs to help your organization connect with outside data providers and consumers. At VSI we've built a number of APIs to move data in and out of Prelude, and we'll discuss the lessons learned in those projects.

### 12:30 - 1:20 **Printing Directly from M2k to a Zebra Label Printer - Room 208**

Jeremy Wallender, WCCO Belting

Do you print labels to a Zebra printer? Do you use a third-party software to help you do this? Ever wish you could bypass that third party? This session will cover generating the zpl code for a label you design with zebra software, incorporating that code into a Manage 2000 process, and sending that zpl code and assigned variables with the data you want to print directly to the printer.



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### 12:30 – 1:20 **Year-end Processing for Accounting - Room 204**

Vicki Gabler

The year-end processing procedures for accountants can run the gambit from a source of irritation to an absolute, large-scale stress making event. Vicki will go over the general best practice guidelines for accounting year-end processing considerations with Manage 2000. As time permits, user interaction and specific Q & A from user experience will drive further discussion on means and procedures for reducing the year-end stress event.

### 12:30 – 1:20 **Vendor Presentation: IT Security/IT Governance - Room 200**

Susan Joslyn, SJ+ Systems Associates

Every year the landscape of IT changes - new products, new platforms and new risks. Let's review the shape of emerging threats and the governance evolving to address them. Stay ahead of the wave—and your auditors.

### 1:30 – 2:20 **Wizard Panel and Manage 2000 Q & A - Room 208**

NovoRoi Systems and Epicor Development Experts

The Manage 2000 development team and Team Novo are on hand in an open forum atmosphere to try to answer questions you have regarding capabilities in the Manage 2000 and NovoRoi Systems software products. 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. Bring your inquiries about Novo and Manage 2000, past, present, and future

### 1:30 – 2:20 **Prelude Presentation: The Opportunity Tracker - Room 200**

Bob Brackbill, Griffin Greenhouse Supplies

Griffin Greenhouse, in conjunction with Precision Solutions, built a tool in Red Leaf that gives us the ability to define and track sales opportunities. Using this feature, we can define several templates for different kinds of opportunities, and this tool helps us track progress all the way from the first contact to the sale.

### 3:00 – 3:50 **MSOs in Web Functions - Room 208**

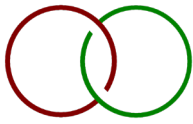
Peter Newby, Epicor Software

Manage 2000 Software Objects provide a method of adding functionality to Manage 2000 processes without customizing the codebase. This session will explore using MSOs in web functions. This new capability in 8.1 sp3 allows you to tailor web portals with extended navigation and quick displays.

### 3:00 – 3:50 **RMA: General Use Case - Room 204**

TinaMarie Leeman, Sparks Belting Company & Dynamic Conveyor Corporation

Come and learn about the RMA module. This session introduces various Return Material Asset concepts including how to manage returns of phantom part assemblies and how they can tie to CASE. Learn about the different types of RMAs and what they do: a straight return; repair and return; return for credit or not, loaners, etc. You have options! Come and learn how and when to employ the various possibilities the RMA module presents.



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**3:00 - 3:50 Vendor Presentation: Central Restaurant Products: A Case Study - Room 200**  
Grant Hart & Perry Stauffer, ONgroup Intl.

We will take you through the planning, conversion and testing undertaken in this case study, sharing the lessons learned and the techniques developed. We will demonstrate the processes involved and the tools we use to efficiently convert programs from MV basic to .Net. We will show you how we convert MV data to SQL Server database and demonstrate some of the benefits that flow from this.

**4:00 - 4:50 ECA Message Content - Room 208**  
Linda McHenry, LJM Services

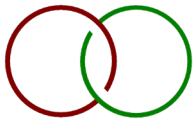
ECA.BUILD (Event/Condition/Action) is one of Manage 2000's workflow tools that allows you to set up notifications based on events in the database. New functionality in 8.1 provides a way to include Attachments and Calendar Events in Email Notifications. This session will give various examples of options that can be used in the Email message.

**4:00 - 4:50 Purchasing - Module Capabilities - Room 204**  
Vicki Gabler

The Manage 2000 PURCHASE module is an extensive procurement suite of applications and operations which can greatly aid a purchasing team in organizing and meeting manufacturing inventory demands. PURCHASE is the primary application which allows for the creation of detailed purchase orders with complex Vendor relationships like blanket purchase orders and with involved line item delivery schedules. Vicki will give a general overview of the M2k Purchasing systems suitable both as an introduction to M2k PURCHASE and as an intermediate refresher on some of the latest capabilities the module has to offer.

**4:00 - 4:50 Vendor Presentation: PowerBI for Prelude Users - Room 200**  
Dick Thiot, Maverick Systems LLC

Business/Data Analysis are readily available today to most business people with tools created to make data analysis easier to do. In this session find out how to use Microsoft's PowerBI Business Intelligence tool with Prelude data. The concepts presented in this session apply to other data analysis tools including Excel as well as other applications that are data driven. Come learn how to drive this functionality with your Prelude or other MultiValue data.



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

### 8:30 - 9:20 **NovoFusion with PLM Focus - Room 208**

Team Novo

NovoFusion is the backbone of all inbound data channels from Novo SQL databases back into U2 systems. Novo utilizes Fusion Windows services for the NovoNexus product as well as other product offerings like the NovoSDI interface. A NovoFusion service is always a good starting point when contemplating a general data interface or data update system into the Manage 2000 ERP. In this session we will use the Manage 2000 ECO.ENTRY application as the business rule in order to demonstrate a simple Product Document Management (PDM)/Product Lifecycle Management (PLM) interface.

### 8:30 - 9:20 **Database Admin/Keeping Your Database Clean - Room 204**

Doug Farmer, Epicor Software

How many sales analysis records are needed? In some cases, all of them, in most cases, a few years are OK. When Manage 2000 was being developed, disk was limited and expensive. No one thought there would be files with over a million records. As data builds up, systems slow down. In this session learn how to clean out old data, old files, and obsolete functions and speed up your system.

### 8:30 - 9:20 **Vendor Presentation: Enabling Prelude as .Net on SQL Server and Replacing SB+ with NetBuilder - Room 200**

Grant Hart & Perry Stauffer, ONgroup Intl.

Come and watch us demonstrate the processes involved, and the tools we use, to efficiently convert programs from MV basic to .Net. We will show you how we convert MV data to SQL Server database and demonstrate some of the benefits that flow from this. We will demonstrate converting SB+ applications to NetBuilder and discuss the benefits that you will enjoy, as well as discuss the differences and efficiencies that are achieved by completing this process.

### 9:30 -10:20 **MRP Survey - Room 208**

Marc Harbeson, NovoRoi Systems

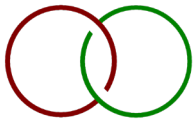
In this session we will continue review of the material supply replenishment calculations from the Material Resource Planning (MRP) point of view. We will cover what each planning order policy type does and discuss the inputs/outputs of the MRP module's planning engine. Some of the items we will discuss are how to review the output, debugging MRP, various strategies for using MRP, and the multiple planning methods available.

### 9:30 -10:20 **Web Security Topics - Room 204**

Peter Newby, Epicor Software

This session will take a look at three very specific Manage 2000 web security features. UrlAuthorizationModule is a new IIS module for adding security tokens to attachment links such as PDF documents. AUTHORIZE.CODE.ACCESS provides security for REST type calls which access Manage 2000 information outside of the reach of function or menu security. AUTHORIZE.DATA.ACCESS provides you with control over role-based data access such as rules governing which sales orders a sales rep may view through the Manage 2000 portals.





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### 9:30 - 10:20 **Vendor Presentation: Code Review and Coding for Testing - Room 200**

Susan Joslyn, SJ+ Systems Associates

Code Review and Coding for Testing are techniques that can offer quality and productivity improvements for any organization, large or small. Both are gaining traction in every industry and development platform. MultiValue need not be an exception. This session will explore code reviewing - what it is, how it's done and what it can bring - and will review ways to develop with function, unit, and white-box testing in mind.

### 10:30 - 11:20 **Forecasting Overview - Room 208**

Marc Harbeson, NovoRoi Systems

In this session we will review how to enable the native Manage 2000 forecast module. We will investigate the methods of forecasting, customer level forecasting and the interface between MRP and/or MPS as well as review of some challenges associated with using the forecast module. In addition, we will review how the update functions work, what is updated, and what the inputs are to the forecast module. Finally, we will touch on specific related topics in the MRP and MPS module while discussing how the forecast is applied to an enterprise material sourcing strategy.

### 10:30 - 11:20 **Extending Manage 2000 Access Beyond PWS - Room 204**

Peter Newby, Epicor Software

There are many ways of extending Manage 2000 access beyond PWS including NovoRoi Systems products and services, ODBC interfaces to UniData files, and Rocket U2 related products such as CorVu, UniObjects, and Rocket Mobile. Numerous standard interfaces in Manage 2000 support integration into other products like MITS and PRC and IQS. In this session we are NOT going to talk about any of those. Rather, this session is about simple standard Manage 2000 web features which can be leveraged to supply ERP data and services beyond your PWS seat count.

### 10:30 - 11:20 **Vendor Presentation: A Year of Cool (What We've Done This Year) - Room 200**

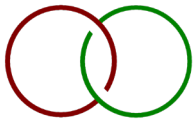
Kevin King, Precision Solutions

In the past year we've done some remarkable things. You have too! For this session, bring your best accomplishments and let's see what everyone has been up to since last year!

### 12:30 - 1:20 **MPS Overview - Room 208**

Marc Harbeson, NovoRoi Systems

In this session we will finish up our review of the material supply calculations from the Master Production Schedule (MPS) point of view. We will review all the different forecast buckets, how inputs feed into the buckets, what happens once MPS is calculated, and the process of how you move the input into MRP to ultimately impact MRP planning calculations. We will also discuss some of the weakness of the MPS module and some ways to address this and use MPS to cure some deficiencies between the Forecast module and the MRP module.



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### 12:30 - 1:20 **General Survey of API Integrations - Room 204**

Trey Miller, NovoRoi Systems

The nature of distributed business computing is changing rapidly in the 21st century. Gone are the days when one single, monolithic enterprise software system would be all things to all users. Increased levels of internet security have allowed for much more stable Application Program Interface (API) which can be utilized to extend a user's capabilities without having to install costly software systems or having to make equally costly changes to existing software systems. Some of the primary methods of interface are the Simple Object Access Protocol (SOAP), and the Representational State Transfer (REST) API approach. We will investigate a few examples of SOAP and REST APIs in the form of Authorize.NET credit card, Avalara Tax interfaces, and others. We will also investigate some API application programming approaches using the open source cURL executable.

### 12:30 - 1:20 **Prelude Presentation: Introduction to Odoo - Room 200**

Jeff Mueller, Precision Solutions

At Precision Solutions, we've been on the lookout for an ERP solution that is adaptable to various businesses and extendable, so that we can add to it and adjust it for each different business type that we serve. Odoo provides a suite of pluggable modules that allow each business to use exactly what they need without the bloat of features they don't, while being fully customizable.

### 1:30 - 2:20 **Closing Comments on NUGM Conference Sessions and General Discussion - Room 208**

TeamNovo

As always, thank you so much for being a part of NUGM and making it what it is!

### 1:30 - 2:20 **Prelude Presentation: Closing Comments - Room 200**