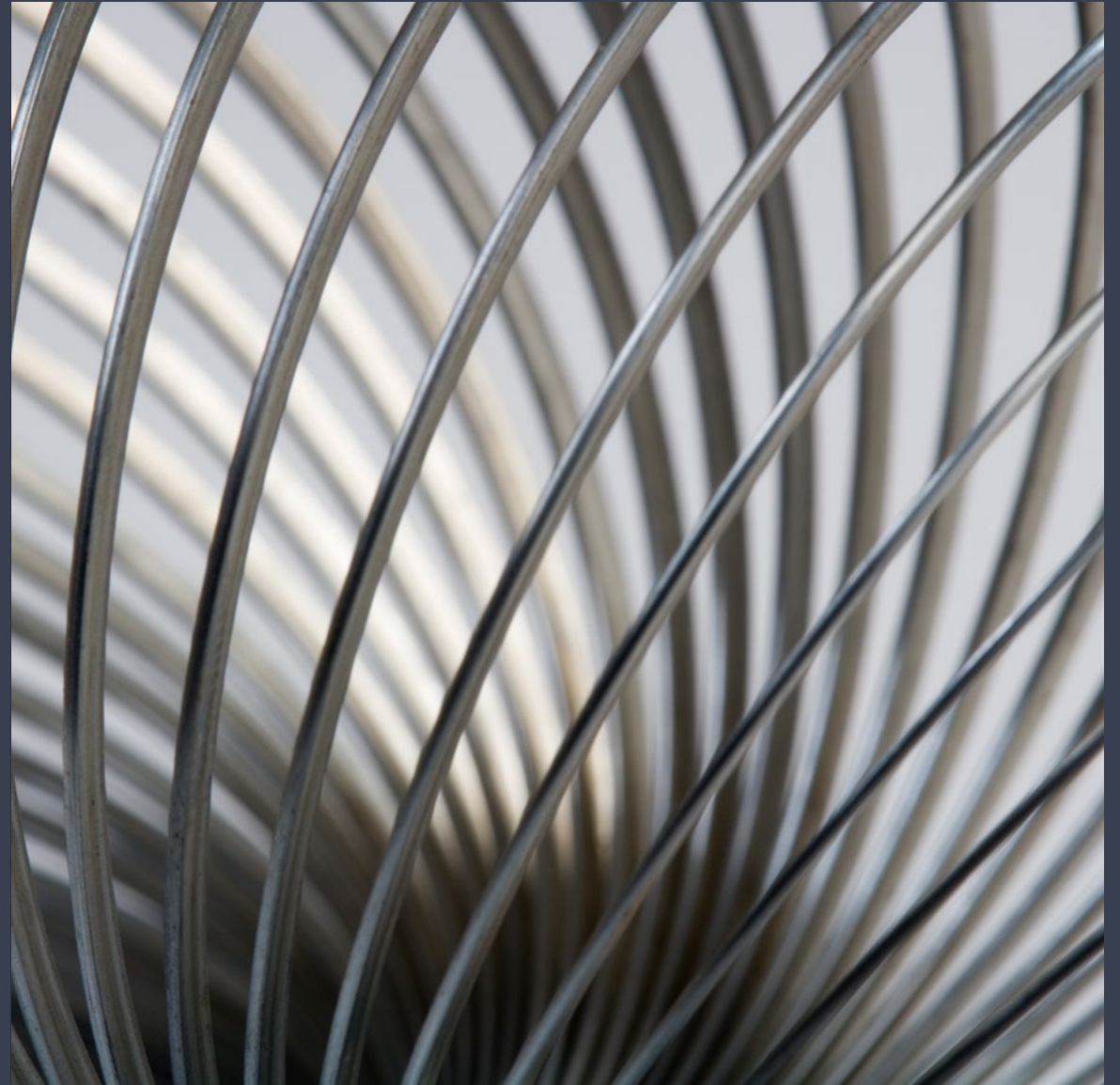


NUGM 2024

MANAGE 2000
DEVELOPMENT
OVERVIEW

Peter Newby, Epicor



AGENDA

- 1) Manage 2000 - The Release 8.1
- 2) Manage 2000 - The Client Base
- 3) What is important in release 8.1
- 4) How are release 8.1 developments valuable
- 5) Manage 2000 Release 8.1 Development By Service Pack
- 6) Q & A



OTHER 8.1 PRESENTATIONS COMING UP

Sessions by Peter Newby

- Manage 2000 as REST Consumer
- Manage 2000 as REST Provider
- ECA Routings/Purchase Requisition Approval

Sessions by Linda McHenry

- Working with MSOs
- Simple to Complex Web Customizations
- Visual Studio Wizards



MANAGE 2000 RELEASE 8.1

The Big Picture



8.1 SERVICE PACK RELEASE HISTORY

Release	Service Pack	Last EC Number	Available Date	Development Cutoff	Days Between	EC Records in Release	Unidata UNIX/Windows/RHEL 8/Win2022
8.1	6	1110	04/23	03/03/23	388	143	8.2.1/8.2.1/8.2.3/8.2.4
8.1	5	0967	03/22	01/28/22	664	224	8.2.1.9106/8.2.3 - Red Hat 8
8.1	4	0743	08/20	04/04/20	418	240	8.2.1.9106
8.1	3	0503	03/19	02/11/19	451	145	8.2.1.9106
8.1	2	0358	01/18	11/17/17	368	238	8.2.1.9106
8.1	1	0120	12/16	11/14/16			8.1.2

13 months to sp2

14 months to sp3

17 months to sp4

17 months to sp5

13 months to sp6

7 ½ years of 8.1

about

1110 engineering changes

150 development changes



MANAGE 2000 THE CLIENT BASE

You Are Here!

Where is everybody else?



MANAGE 2000 CUSTOMER BASE BY RELEASE

Release	<----- (1) Historical	----- (2) Development Server	----- (3) Disaster Recovery Server	Customers (4) Fenwick	----- (5) Under Warranty	----- Total Active Customers (4) + (5)	----> % of Total	<----- (8) Historical Users	----- (9) Development Server Users	----- (10) Disaster Recovery Server Users	Users (11) Fenwick Users	----- (12) Under Warranty Users	----- Total Active Users (11) + (12)	----> % of Total
6.2E				1	2	3	2.00				15	80	95	1.00
6.5C	5				10	10	9.00	128				255	255	4.00
7.0C			2	1	11	12	11.00			55	99	482	581	10.00
7.1C			1		3	3	2.00			40		248	248	4.00
7.2C	1	1			2	2	1.00	15	12			286	286	5.00
7.3C	2		1	1	8	9	8.00	75		175	45	429	474	8.00
8.0C	1	2	1		17	17	16.00	5	13	5		987	987	18.00
8.1C	1	6	2	1	44	45	44.00	41	65	1	37	2,347	2,384	44.00
Grand Total	10	9	7	4	97	101	100.00	264	90	276	196	5,114	5,310	100.00

100 companies - 5,300 user seats

44% on some service pack of 8.1.

16% on some service pack of 8.0.

most of the rest on 7.3, 7.0, or 6.5. - onesie twosie on 6.2, 7.1, 7.2



WHAT IS
IMPORTANT IN
RELEASE 8.1



WHAT I THINK IS IMPORTANT

- Unidata 8.1 64 bit file system sp2
- Supported on LINUX sp6
- Manage 2000 as REST Consumer sp5
- Manage 2000 as REST Provider sp6
- Text Messaging sp5
- MSO Support in Web Functions sp3
- Attachments Everywhere sp1
- EXCEL Exports Everywhere sp1
- PDF Output sp1
- Photo Image Support in PWS sp1

Whatever enhancement addresses your particular need becomes your big rock.



VALUE OF 8.1 DEVELOPMENTS

- Increase granularity in modeling your business
- Find more stuff more quickly
- Move more stuff to EXCEL
- Automate more stuff
- Communicate more effectively
- Present information more clearly
- Streamline system administration
- Improve security
- Leverage Internet resources



INCREASE GRANULARITY MODELING YOUR BUSINESS

- Work Center cost calculation factors by cost set (PDM, sp1)
- Labor rate variance based on work order type (MFG-cntrl, sp1)
- Part Level Efficiency Factors override WORK.CENTER factors (MFG-cntrl, sp1)
- UNPLANNED.OUTPLANT - account for standard vs actual costing variances (MFG-exe, sp4)
- MRP applying safety stock differently to different parts (MFG-pln, sp1)
- MRP Order Policy W is a variation on Order Policy U (Min Max Order Up to). It recognizes order minimums and maximums in addition to order multiples (Mfg-pln, sp4)
- BILLS Reference Designator Sorting Enhancement (PDM, sp2)
- BILLS Unique Balloon Numbers Checking (PDM, sp2)
- Retail Delivery Fee (RDF) processing (Sales, sp6)
- Sales Order Surcharge processing (Sales, sp6)



FIND STUFF MORE QUICKLY

- LOOK.SO - finding non-inventory item number orders (Sales, sp1)
- MWU.MLB.CM.COMMITTED finding orders for parents or children of an item (Sales, sp1)
- PRO.NBR.LOOKUP - finding sales order and shipment information from a PRO Number (Sales, sp4)
- PLANNED.LOAD - report listing of all un-released load (MFG-crp,sp4)
- RELEASED.LOAD -report listing of all released load (MFG-crp,sp4)
- SLB.WOS Shows Planned and Actual Labor Run Times (PDM, sp4)
- LATE.PO - by Buyer (PUR, sp2)
- PO.COMMIT - by Facility and Inventory Type (PUR, sp2)



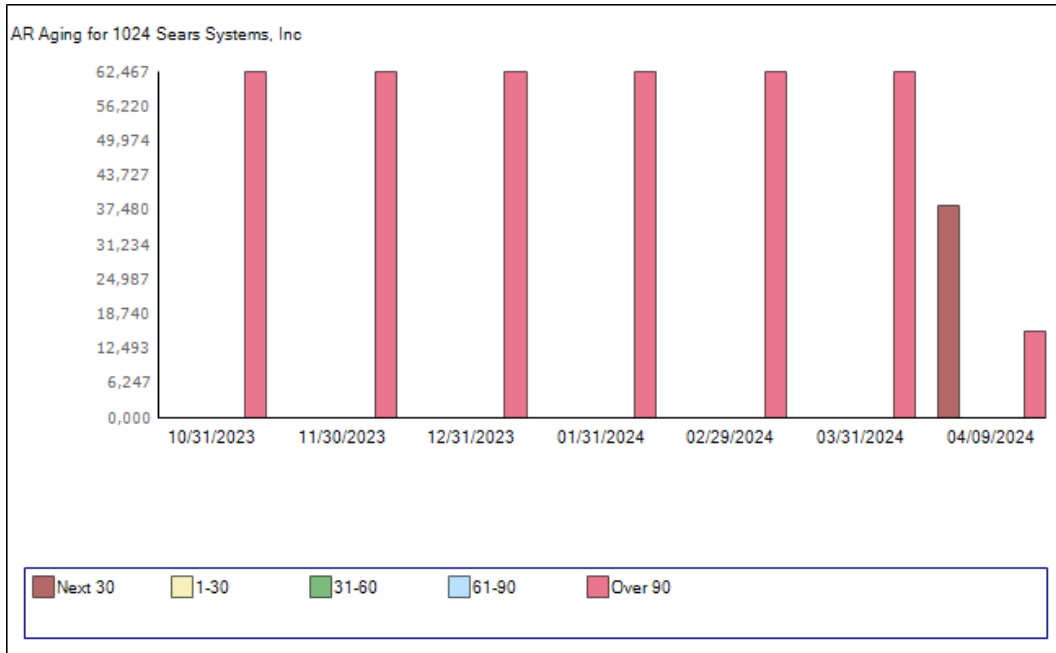
AUTOMATE MORE STUFF

- SHIPMENTS prints BOL documents (Sales,sp1)
- Sales Quotes conversion to Orders generates work orders (Sales,sp1)
- AUTO.PAYABLE automatically generates AP invoices for PO receipts (GA-ap, sp1)

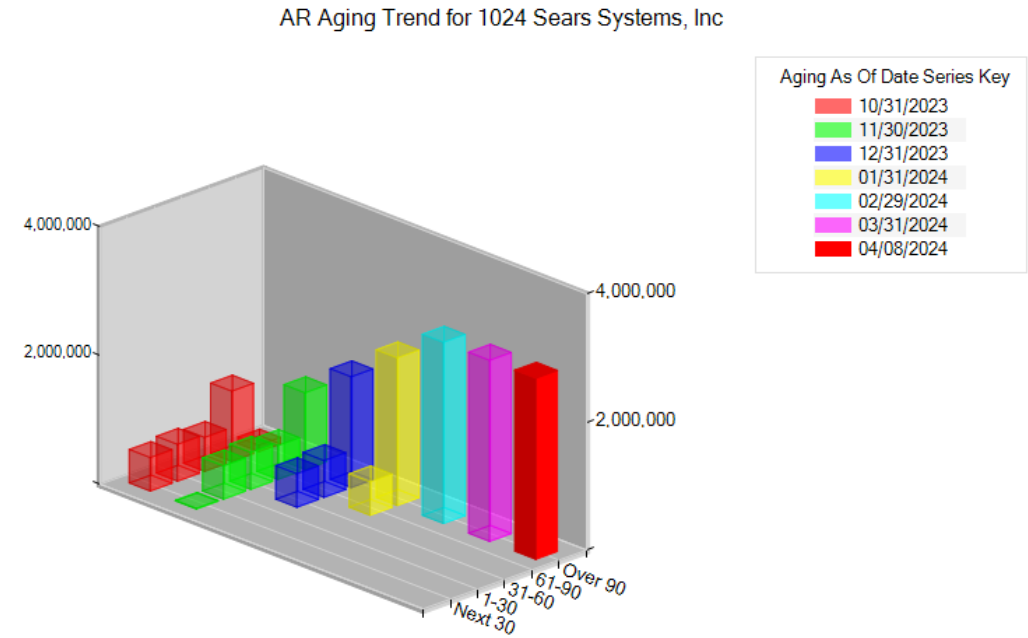


PRESENT INFORMATION MORE CLEARLY

A/R Trend Graph in 8.0 - 3D info in 2D graph



A/R Trend Graph in 8.1 - 3D graph



STREAMLINE SYSTEM ADMINISTRATION

- PMT.STACK.MASS.UPDATE - duplicate, replace, or delete user prompt stacks by user
- SECURITY.MASS.UPDATE - copy security entries from one user to another, delete or change the user
- SHOW.PROMPT.STACK - display or Print prompt user stack items
- ATTACH.MASS.UPDATE - update attachments file with links from a spreadsheet
- DJS option to use the login ID of the person who submitted the DJS job as the owner of any output
- LOAD.INDEX - report files that will be reloaded if the RELOAD.REQUIRED option is used and why they need reloading
- LOGON.CONTROL - allow specific non system administrators into the system



8.1 DEVELOPMENT BY SERVICE PACK



SERVICE PACK 7 WIP

- Purchase Order ApproveRequisition web function for ECA Routed Reqs
 - sp6 Dev Trsr: 40707
- ProductConfigurator enhancements
- MSO Variable replacement support for calculated fields \LK CM{CM.CityStZip}
 - sp6 Dev Trsr: 40637
- More REST development
 - sp6 Dev Trsr: 40672, 40673
- Javascript Infrastructure Project
 - ES6
 - !Prototype.js



SERVICE PACK 6 (1 OF 2)

- REST Provider API (Postman M2K.REST.SERVICES API Collection)
- MyPrintJobs web function sorts most recent print job first, also new option to delete the print job
- Most Recently Used (MRU) up-arrow list on PWS prompts supporting \LK
 - Treasure Number 40716 adds validation to SetLastKeys when it is storing the MRU list for better experience
- sp6 wizards have been enhanced to work with Visual Studio 2022
 - They no longer work with VS 2019 or below
 - We can fix that - Visual Studio Wizards patch
- Grand Totals on many web inquiry pages
- CountEntry web function version of COUNT.ENTRY (count on tablets in warehouse)
- ApproveCredit web function version CREDIT (Credit Mgr. at Starbucks)



SERVICE PACK 6 (2 OF 2)

- Retail Delivery Fee (RDF) processing
- Sales Order Surcharge processing
- AP.1099.AUDIT.ADDR - New report function
- VERTEX O-Series Support
- Supported on LINUX (with Windows Server 2019 proxy for VisiFax)



SERVICE PACK 5 (1 OF 2)

- REST Consumer API (REST.SERVICES, REST.NEWS, REST.MSO)
- Text Message delivery of ECA notifications
- USPS Zip+4 Interface
- Web DE 5.3.1 Open Java SDK
- SeeAlso in portals - Documentation in any browser
- AP.PAYMENT - New form AP.CHECK



SERVICE PACK 5 (2 OF 2)

- Cycle Counting Enhancements
- PICountEntry web function
- InventoryAdjust web function
- REBUILD.TRIGGERS - Rebuilds triggers on files based on settings in DICT.BUILD
- EOTViewer experimental EOTViewer Web Client



SERVICE PACK 4 (1 OF 3)

- SLB.WOS Shows Planned and Actual Labor Run Times
- UPDATE.REV.BY.DRAWING Update Revision Level Information
- MRP Order Policy W is a variation on Order Policy U (Min Max Order Up to). It recognizes order minimums and maximums in addition to order multiples
- UNPLANNED.OUTPLANT - helpful to account for standard versus actual costing variances
- UnplannedMove - web version of PWS UNPLANNED.MOVE function
- PLANNED.LOAD - report listing of all un-released load
- RELEASED.LOAD - report listing of all released load



SERVICE PACK 4 (2 OF 3)

- PRO.NBR.LOOKUP - show sales order and shipment information for PRO Number
- ORDERS.ON.MRP.HOLD - show sales orders flagged for MRP planning hold
- ATTACH.MASS.UPDATE - update attachments file with links from a spreadsheet
- DJS option to use the login ID of the person who submitted the DJS job as the owner of any output
- ECL.COMPOSE.CMDS and ECL.COMPOSE - New file ECL_COMPOSE_DATA these two new functions support the construction and gathering of ECL commands to produce a single output
- LOAD.INDEX - report files that will be reloaded if the RELOAD.REQUIRED option is used and why they need reloading
- LOGON.CONTROL - allow specific non system administrators into the system



SERVICE PACK 4 (3 OF 3)

- MONITOR.PHANTOMS - checks to see if Manage 2000 service phantoms are running
- MT420 - better auditing of inputs
- JSON.PACKAGE.MAINT specify packages of data for exporting to Power BI and EXCEL



SERVICE PACK 3

- MSO Support in Web Functions
- UserPreferences ContactInfoMaint - Customer Administrator role (CMADM) users may create, change, and de-activate other users from their company
- GLT.INQ Summarized IT Display Optimization - GLT.INQ ItDetail.aspx page upgraded to paged BTO. This provides faster access to larger result sets. (rebooty)
- MA.TASKS 8.1 sp3 - add missing and NO.UPDATE prompts
- SHOW.PCL 8.1sp3 -showing PCL command strings and descriptions
- WEB.SETTINGS.INQ function displays the web preference hierarchy settings for a contact



SERVICE PACK 2 (1 OF 4)

- UniData 8.2.1 – Web DE 5.3 - 64 bit file system - NO 2 GIG LIMIT!
- ECA Support for Attachments and calendar events
- BILLS Reference Designator Sorting Enhancement
- BILLS Unique Balloon Numbers Checking
- SHOW.PS Output Type Excel
- DEFINE.CCV.FIELDS - SHOW and COPY options
- DUP.ITEM - Dup Table SHOW option



SERVICE PACK 2 (2 OF 4)

- ITEMS.MFG, BM.CONSTANTS - allow or disallow multiple items with the same synonym
- SUM.BILL - Extended Cost Display
- PURCHASE, SF.PURCHASE - AP Vendor Credit Warning
- LATE.PO - by Buyer
- PO.COMMIT - by Facility and Inventory Type
- CHECK.AVAIL EOT Viewer Support
- ShoppingCart - Associated sales items



SERVICE PACK 2 (3 OF 4)

- ADI.LABOR.INQ - allows viewing ADI.LABOR transactions without providing ability to update
- W(+/-)n Shop Calendar Based Date Entry Shortcut
- DISPLAY.CTL.BUILD by User
- AUTHORIZE.CODE.ACCESS - secure and log REST, WEB.SERVICES, and Javascript calls to subroutines running in the UniData database
- AUTHORIZE.DATA.ACCESS - web function data record authorization checks based on role and role ID
- FN.BUILD - RUN HISTORY button displays run history for web functions as well as PWS functions
- PMT.STACK.MASS.UPDATE duplicate, replace, or delete user prompt stacks by user



SERVICE PACK 2 (4 OF 4)

- Process Work Files - All process work files are now created using the UniData 64 bit file structure
- REPORT.BUILD SHOW option
- SEC.CROSSCHECK.MAINT, SHOW.SEC.CROSSCHECK define functions that should be separated by users
- SECURITY.MASS.UPDATE - Copy security entries from one user to another, delete or change the user
- SHOW.PROMPT.STACK - Display or Print prompt user stack items
- MT435 Support for Exporting To Excel from File allows developers to take columnar data from other sources (besides UniQuery statements) write them to the `_HOLD_` file and CALL MT435 to perform the export to Excel
- Web DE 5.3 super fast connections
- UrlAuthorizationModule monitor incoming requests for attachments and ensure that they have not been tampered with



RELEASE 8.1 (1 OF 9)

- Mapping in Manage 2000...
- PDF Output in Manage 2000...
- Photos may be displayed in PWS screens ...
- Inventoried Part Cost Update Task Level Security - Item Master (IM) updates to the six standard Manage 2000 cost sets may now be secured using Task Level Security
- Transfer Part Freight Costing...
- RECALC.FREIGHT.COSTS has been enhanced to calculate incremental freight cost on transfer parts
- Work Center Cost Calculation Factors by Cost Set



RELEASE 8.1 (2 OF 9)

- Safety Stock Planning enhancements - new planning option L instructs the MRP.CALC inventory planning function to peg Safety Stock as a single additional demand. MRP can now apply Safety Stock differently to different parts
- Inter-facility Transfer Order Freight Carrier Default
- Graphs in Time Buckets, MRP Periods, and Graphs have been enhanced
- Web functions MtoReceiptEntry and MtoShipmentEntry
- TruckScheduling TruckRoute maps and directions
- WP.VOID.HIST.INQ shows voided work order history data
- Part Level Efficiency Factors override WORK.CENTER factors for more granular control



RELEASE 8.1 (3 OF 9)

- Labor Rate Variance Accounting - labor rate variance accounting selectively based on work order type
- Work Order Costing (WOC) Reports EOT Viewer output –
 - WIP.ACCTG.VALUE Report Current WIP Accounting Value
 - WIP.PROD.VALUE Report Current Production Net WIP Value
 - ME.WIP.ACCTG.VALUE Report Saved WIP Accounting Value
 - ME.WIP.PROD.VALUE Report Saved Production Net WIP Value
- RmaWebReceipts new web function
- SoWebShipments new web function
- SoPortal (LOOK.SO) and SalesQuotePortal (LOOK.SQ) can now search for sales orders and quotes based on non-inventory item numbers
- SHIPMENTS - can now print bill of lading documents automatically
- Sales Quote to Order Conversion can now automatically creation of work orders



RELEASE 8.1 (4 OF 9)

- MWU.MLB.CM.COMMITTED shows open sales quotes and/or sales orders for a requested part and either its parent parts or component parts
- CONTACTS drag and drop of contact photos from other windows applications to the Manage 2000 attachment system
- ContactDisplay - displays contact's photo
- PRINT.DET.JOURNALS, PRINT.IT.JOURNALS now support EOT Viewer output
- REBUILD.STATEMENTS will refresh account number ranges defined for general ledger
- XLConnect Integration - Manage 2000 now interfaces with the Epicor XLConnect product
- AUTO.PAYABLE - Automatically generates accounts payable invoices for purchase order receipts



RELEASE 8.1 (5 OF 9)

- ADJ.PAYABLE now allows changing the remit to vendor number and exchange rate
- EFT.PRINT - allows printing, faxing or emailing electronic funds transfer acknowledgements for the vendor
- EFT.PAYMENT can now create EFT acknowledgements
- SHOW.COGS.ACCOUNTS uses EXCEL to display the current matrix of cost of goods sold income accounts
- SHOW.SALES.ACCOUNTS uses EXCEL to display the current matrix of sales income accounts
- AGE.AR may now be displayed in the EOT viewer
- CustARagingGraph and CustAgingCredit graph trend information is presented in 3 dimensions showing the trend progression more clearly



RELEASE 8.1 (6 OF 9)

- UPDATE.AR.BATCH - change the batch number to which an AR cash receipt is assigned
- Electronic Data Interchange (EDI) enhancements
- REPROCESS.OUTBOUND.EDI - re-create ACTION.1 ticklers for processing outbound EDI transactions
- updates to EDI 810 Outbound, EDI 840 and 850 Inbound, EDI 856 Outbound
- Database Triggers - UniData 8.1 introduces "AFTER" triggers. Added in DICT.BUILD
- Dynamic Printer and PDF output
- IEP reports can now go to the EOT Viewer, instead of the PWS Browser.
- PDF Printing - Manage 2000 now has the ability to send reports and forms to a PDF file
- REPORT.WRITER can now output reports to the EOT Viewer



RELEASE 8.1 (7 OF 9)

- Manage 2000 8.1 runs on UniData version 8.1 providing a true 64 bit processing environment
- No more 2GB limit on file sizes
- Increased memory addressing
- Support for IPv6
- High Availability features
- For UNIX customers, the UNIX vi editor command is now shelled
- New basic code functions and subroutines...
 - Mapping_GetAttributes ...
 - Mapping_LookupCoordinates...
 - Mapping_UpdateCoordinates...
 - Mapping_EncodeAddress...
 - Mapping_DisplayMap ...
 - StripPCL...
 - PDF_PARAMETERS.ToXml...
 - UNCToVirtual...
 - PCResolveToUNC...
 - StartStopRedBack...
 - GetRedBackVersion...
 - IsRedBackRunning...



RELEASE 8.1 (8 OF 9)

- 64 Bit Capable using Web DE 5.2 JavaScheduler connections...
- Replaced the Infragistics UltraWeb web controls in all web functions...
- All web function grids have Excel export support...
- All web function grids use partial postback techniques....
- Attachments available everywhere...
- BatchProcess...
- GetItemsAsJSON - Grab UniData information in JSON format declaratively...



RELEASE 8.1 (9 OF 9)

- NEWS.ARTICLES new SPOOLER news source...
- NewsReader...
- Single Sign On for non-PWS network users...
- WEB.CONSTANTS ...
- Global Javascript Injection
- Default Web Password



QUESTIONS AND ANSWERS



NUGM 2024

THANK YOU

