



ISTechSupport

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Evo-ERP & DBA Classic User Symposium July 16-18, 2014 Agenda

Wednesday July 16, 2014

Note: Times are approximate.

8:30 - 9:00 Introductions - Introduction to Evo-ERP and IS Tech Support staff and introduction of attendees to one another

9:00 - 9:15 JDBC Setup - A number of the new programs use Java and JDBC to access the data rather than the TAS programming language so there is some setup required.

9:15 - 9:45 BOM Programs - BOM of an assembly in a tree view with component availability visible with color coding; Create/Edit BOM in tree view.

9:45 - 10:00 Customer Service Inquiry - Orders, Shipments, Work Order Status and shipment tracking.

10:00 - 10:15 Check for Updates - New option within the Evo menu to check for program updates eliminating the need to release interim Service Packs.

10:15 - 10:30 Support Upload - New option within the Evo menu to make it easier to send us data files or screen prints for troubleshooting.

10:30 - 10:45 Break

10:45 - 11:15 Business Status - New version of the Business Status program that recalculates from source data each time it loads, ensuring accuracy.

11:15 - 11:30 SA-F Sales Charts - Sales Analysis tool that enables Pie, Line and Bar Charts and data dump to Excel for further analysis

11:30 - 12:00 Defaults - IS Tech Support Master Company Defaults & User Settings.

12:00 - 1:00 Lunch Break

1:00 - 2:00 Java Schedulers - Work Order and Work Center visual schedulers with drag and drop capability.

2:00 - 2:30 DE-A - New SQL Query Wizard enables exporting data from multiple files linked by common fields.

2:30 - 2:45 Break

2:45 - 3:00 Outlook Synchronization - Evo Reminders and Contacts can be passed to Outlook Appointments and Contacts.

3:00 - 3:30 Defaults - IS Tech Work Order Defaults.

3:30 - 4:30 Open Forum

Thursday July 17, 2014

8:30 - 9:30 Grids - Edit Grids to add columns; add drill downs; limit access based on security.

9:30 - 10:30 Notes - Evo Notes and Note Types. Access to Notes using ODBC. Printing Notes

10:30 - 10:45 Break

10:45 - 11:30 Links - Evo Links versus DBA Item Image links. Printing linked Documents

11:30 - 12:00 Reminders and Triggers - Automatic reminder for appointments, calls and triggers when events occur in the system.

12:00 - 1:00 Lunch Break

1:00 - 1:30 Paperless Shop Floor - Work Order processing without the paperwork. Clocking in and out, issue materials, pulling up drawings, work instructions, entering test results and more.

1:30 - 2:00 Hand Held & Bar Code - Scanner options, 1-D and 2-D bar code.

2:00 - 2:30 PO Digital Signature - Entering approved signers, assign spending authority limits.

2:30 - 2:45 Break

2:45 - 3:00 Contract Review - Assigning departmental approvers, approving orders, linking associated documents, electronic "Job Folder".

3:00 - 3:30 Defaults - IS Tech Purchase Order Defaults.

3:30 - 4:30 Open Forum

Friday, July 18, 2014

8:30 - 9:30 Security & Menus - Users, Passwords, Security Levels, Menu Access Control.

9:30 - 10:00 Data & Folder Maintenance - Purging, archiving, cleaning up unneeded files, backing up data folders.

10:00 - 10:30 Program Scheduler - Selecting programs, entering time and frequency.

10:30 - 10:45 Break

10:45 - 11:30 RTM Editing - Moving and adding fields, Bar Code, changing fonts.

11:30 - 12:00 Defaults - IS Tech Sales Order Defaults.

12:00 - 1:00 Lunch Break

1:00 - 2:00 SR/RMA - RMA entry, Receipt, Disposition, Convert to Service Order, Convert to Work Order, Release to ship and calculate costs and pricing.

2:00 - 2:30 Estimating - Updated Estimating module with multiple BOM and Routings per item and a separate Estimating Item Master so Items do not need to be added to the production inventory files until the order is placed. Improved RFQ processing.

2:30 - 2:45 Break

2:45 - 3:30 Defaults - Master Defaults program to update the defaults for all programs.

3:30 - 4:00 What's coming and Wrap-up- All-in one Sales Order, Work Order, Purchase Order programs, improved AP Credit card payment processing

4:00 - 4:30 Open Forum