

Manage 2000 Feature Summary

(Release 7.1)

Manage 2000

Manage 2000 Feature Summary

Epicor Software Corporation

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Table of Contents

Introduction	1
Release 7.1 Features	3
Release 7.1 Highlights.....	5
General.....	11
Product Data Management.....	13
Manufacturing.....	15
Planning.....	17
Execute.....	19
Control.....	23
Sales and Marketing.....	27
Customer Relationship Management.....	33
General Accounting.....	35
Interface.....	39
Electronic Data Interface.....	41
Tools.....	43
Analyze 2000.....	45
System Users.....	49
Technical Users.....	53
Documentation.....	59
Documentation History.....	61
Conversion to XML.....	63
Integrated Learning System.....	65
Solution Overviews.....	67
Application Overviews.....	69
Topic Overviews.....	71
How-to's.....	73
Application How-to's.....	75
How-to Courses.....	77
Function Documentation.....	79
Field Help.....	81
Glossary.....	83
Technical Documentation.....	85
UniData Help Documentation.....	87
Documentation Differences Between Release 7.1 and 7.0.....	89

Table of Contents

Release 7.0 Features	91
Product Data Management	93
Manufacturing	95
Planning	97
Execute	99
Control	101
Sales and Marketing	103
Customer Relationship Management	105
General Accounting	107
Interface	109
Electronic Data Interface.....	111
Tools	113
System Users.....	115
Technical Users	117
Documentation.....	121
Release 6.5 Features	123
Product Data Management	125
Manufacturing	127
Planning	129
Execute	131
Control	133
Sales and Marketing	135
Customer Relationship Management	137
General Accounting	139
Interface	141
Electronic Data Interface.....	143
Tools	145
System Users.....	147
Technical Users	149
Documentation.....	151

Manage 2000 Feature Summary

Welcome to the Manage 2000 Feature Summary - an overview of new Manage 2000 functionality as of release 7.1 SP2.

Release 7.1 is a culmination of customer suggestions, responses to market demands and trends, and advanced technology, and reflects Epicor's commitment to provide to you, our customer, regular product enhancements with powerful, reliable, easy-to-use tools. The purpose of this release is to deliver relevant, technology-driven solutions that can provide sustained business advantages to you.

This document contains a high-level overview of the major new capabilities contained in this release and the significant capabilities in releases 7.0 and 6.5. It is oriented towards anyone who wants a general understanding of the enhancements to Manage 2000. It assumes that the reader has no detailed knowledge of Manage 2000 functionality, but has general business knowledge relative to the application being discussed. This document concentrates on the value of the enhancements or additions to the business.

To get the most out of this document, the following is suggested:

- *Select the Manage 2000 Feature Summary link to print a cumulative copy of this document.*
- *Select Show Instructor-Led Format on the Options tab (with steps expanded where applicable) to view feature/enhancement highlights*
- **OR**, *Select Show Self-Led Format on the Options tab to view feature/enhancement highlights plus additional information.*

Release 7.1 Features

This section reviews all features and enhancements in release 7.1. Each feature and enhancement includes a reference to the service pack (SP0, SP1 or SP2) it is available.

Release 7.1 Highlights

This page is a high-level overview of the major new capabilities in release 7.1, concentrating on the value of the enhancements or additions to the business. Refer to other pages in the Release 7.1 Features section for a summarization of the release highlights.

Customer Relationship Management

The Epicor family of business software includes **Clientele**, a fully-featured and field proven CRM product.

Release 7.1 offers integration with Clientele as a major addition to the Manage 2000 CRM solution.

- Ability to populate the Clientele database with parts, sales orders, pricing, customers tables.
- Ability to import customers and sales orders from Clientele.
- Option to calculate prices and taxes in either Clientele or Manage 2000.

Manage 2000 sites can take advantage of all Clientele sales and marketing features, for example:

- Contact Management
- Lead and Opportunity Management
- Quoting and Order Management
- Marketing Program Management
- Forecasting and Pipeline Management
- Workflow (Clientele Conductor)
- Sales Force Automation (Clientele Connector) - Synchronization

Analyze 2000

Release 7.1 of Manage 2000 includes an enterprise-wide business performance reporting capability (Analyze 2000), seamlessly integrated with 50+ out of the box reports using over a dozen applications including:

- Sales Analysis (billings, bookings, and shipments)
- Sales Backlog
- Inventory Activity
- Inventory Turns
- Vendor Performance
- Quality Control
- Call Center

Business performance reporting describes a broad range of applications and tools whose common purpose is to transform the massive amounts of data that flow through business systems into useful information. The best business performance reporting systems available today take into account the information needs of every functional area in a business.

SALES ANALYSIS Sales_person_name Prod_code_desc	SALES QUARTER 2003 Q4 thru Oct 02nd	COST QUARTER 2003 Q4 thru Oct 02nd	GP QUARTER 2003 Q4 thru Oct 02nd	GP% QUARTER 2003 Q4 thru Oct 02nd	SALES YEAR 2003 May 28 -Oct 02	COST YEAR 2003 May 28 -Oct 02	GP YEAR 2003 May 28 -Oct 02	GP% YEAR 2003 May 28 -Oct 02
SALES.ANALYSIS:	3,314,431	1,445,092	1869338.7	56.4	22,669,201	17,443,806	5225395.4	23.1
Jake Needles	1,551,351	757,310	794041.2	51.2	11,115,259	8,566,781	2548478.4	22.9
Accessories	2,783	2,541	241.8	8.7	58,849	49,313	9536.1	16.2
Class 1 System	761,612	237,231	524380.5	68.9	6,729,754	5,162,918	1566836.4	23.3
Class 2 System	446,390	368,874	77516.2	17.4	2,909,372	2,464,278	445093.6	15.3
Class 3 System	92,740	48,936	43804.4	47.2	332,859	230,226	102633.4	30.8
Class 4 System	143,000	72,366	70634.0	49.4	771,430	608,526	162904.4	21.1
Design & Development	59,000	0	59000.0	100.0	236,000	0	236000.0	100.0
Spare Parts	45,826	27,362	18464.3	40.3	76,994	51,520	25474.4	33.1

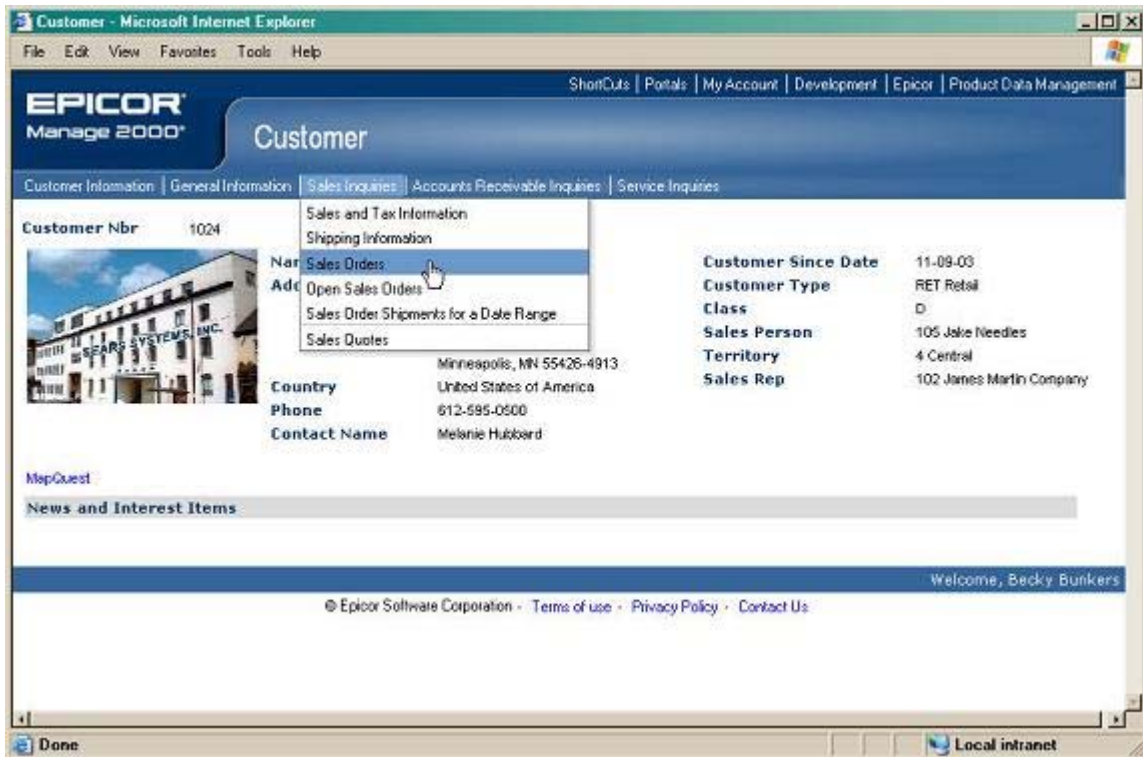
Manage 2000 has long supported business performance reporting, but in 7.1, BPR capabilities can be made available to all users, not just to executives or high-level analysts. To facilitate organization-wide Analyze 2000 implementation, Manage 2000 7.1 includes:

- System administration functions to create, manage and update MITS software accounts.
- Out-of-the-box MITS-based functions give Manage 2000 customers a head start. These functions are designed to be used as-is, but also with tailoring in mind.
- Training and other documentation to assist both system administrators and end users.
- Manage 2000 Helpline and custom code support.
- Using the security features of MITS, an accounting department can make receivables information available to regional managers over the Web, filtering the available information by region, using a single application (cube).

User Interface

7.1 includes major user interface enhancements, including extensive updates for all existing Web browser functions and the addition of new Web browser applications. Analyze 2000 applications are included.

- More portals, and many Manage 2000 functions are converted to Web pages to allow Manage 2000 sites to take greater advantage of Web browser technology. Portals run under .NET technology, using the best tools available for implementing ERP applications in a Web browser environment.



- Major upgrade to menu structure with the inclusion in menus of such functions as:
 - Manage 2000 documentation
 - External Web links
 - Internal Web links to Manage 2000 Web applications

All items that can be called from a menu are now in the Function Master file, making menu features such as pseudo functions easier and more intuitive to maintain.

- Enhancements also include a powerful search engine.

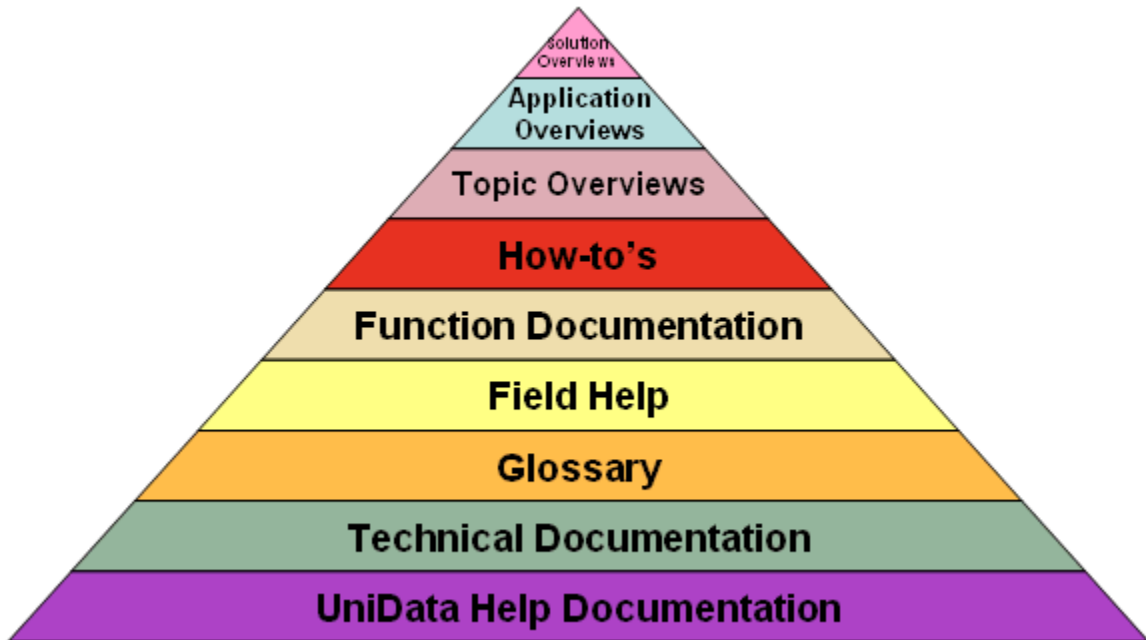


Documentation

Manage 2000 Release 7.1 takes full advantage of the important technologies available to the developers of modern, fully integrated software documentation that is maintained in XML:

- Allows content of a document to be used in other documents.
- Interfaces with stylesheets so content can be presented in multiple ways.
- Content can be tagged and interfaced with search engines, making tagged content easier to locate.
- Achieves tight integration of many types of documents with Manage 2000.

Manage 2000 release 7.1 includes the new 9-layer documentation system, a hierarchical integrated learning system that ranges from executive to technical levels.



- Intuitive for programmers and users.
- Excellent fit for multi-dimensional environment.
- License-free, platform independent, and well-supported.

The Cost Transfer Summary and General Accounting documents have been merged into a new and enhanced document with multiple drill-down and display options. It includes updates and new sections and is now available on-line.

Core Business Software

Despite intense development in software technology areas, core Manage 2000 business application growth continues unabated. Major additions and enhancements to Accounting, Customer Service, Engineering and Manufacturing are included in Release 7.1. Also, Manage 2000 is rapidly embracing Web technology to improve the user interface, with many functions having already been converted and appropriately enhanced in 7.1.

Some features include:

- Additional GL drill-downs
- Additional EDI and ADI transactions
- Back orders for Material Transfer Orders
- MTOs integrated with Truck Scheduling
- Capture of benefit times through shop floor reporting
- Multiple charges of one AP invoice for a work order
- A dozen sales order/accounts receivable enhancements

Developer Tools

Developer tools have always been the foundation of Manage 2000 applications. The tool set grows as application demands increase. The challenge of developing new Web applications rapidly has been met with an intense focus on new tools, tools that incorporate the best new technology available.

The Manage 2000 .NET developer tool suite provides a solid infrastructure for standard product, and is available to developers at customer sites to aid in tailoring, customizing and building additional applications. The tradition of classic tools such as **SCREEN.BUILD** and **SCREEN.IP** remains firmly in place, but with its scope expanded to include Microsoft and Infragistics components.

General

This section lists enhancements with system-wide implications.

City Field Size (SP0)

- expanded from 15 to 30 characters for all files that include address information

Product Data Management

The enhancements described here represent major improvements to CTO and ECO processing.

Function Converted to Web Inquiry (SP0)

- **LOOK.IM.ACCESS**

Web-based Version of CTO.ENTRY (SP0)

- addresses the needs of some Manage 2000 companies to enable CTO for traveling representatives

Configure to Order - Miscellaneous (SP0)

- supports an additional price roll choice, "Options Only" (previous choices were Model Only, Options and Real Items, and Model, Options and Real Items)
- supports reiterative models where screens of lower level models are present and loaded when a user is reconfiguring a top level item

ECA Notification Capability Added to Engineering Change Order Process (SP0)

- streamlines the ECO approval process

Manufacturing

This section reviews manufacturing features that are categorized by planning, execution, and control.

Some 7.1 development in the manufacturing areas was also implemented in the most recent 7.0 service pack, and is therefore not documented here. To take full advantage of much of this functionality requires 7.1.

Manufacturing - Planning

New Option to Reschedule Repetitive Production Plans (Master Production Rate Scheduling) (SP0)

- provides a third option, next period pull, for rescheduling repetitive production plans (existing reschedule options are forward and backward)
- new option causes the capacity smoothing program to fill in periods under capacity by pulling in planned production from subsequent periods

The capacity analysis and smoothing process proceed from the current period to the last period in this case. Periods remaining over capacity are not smoothed with this option.

System level default settings for the new reschedule option and the number of future periods to pull from are maintained in **MPS.CONSTANTS**.

MPS planning group overrides for these settings are maintained in **MPS.GROUP.MAINT**.

Vendor Delivery Hourly Scheduling with Repetitive Manufacturing (SP1)

- new function, **MRP.SCHED.CALC**, schedules eligible repetitive manufacturing production plans down to the time of day. The scheduling is accomplished by a three stage planning process:
 1. MRP run plans materials for all parts.
 2. Scheduling run schedules the plans created by MRP down to the time of day using manufactured item routings and activity/event calendar time period definitions for the calendars assigned to the key scheduling work centers. (Activity/event calendars are created/maintained in the new function **AEC.MAINT**.)
 3. Cleanup MRP run re-synchronizes plans for component parts at lower levels in the bill of materials which are not subject to hourly scheduling.

The following functions have been modified to support vendor delivery hourly scheduling:

- **BLANKET.PO.RELEASE** calculates vendor delivery schedules down to time of day for all eligible purchased parts
- **VENDOR.DEL.SCHEDULE** has a new optional print format that includes delivery information down to time of day

Capacity Requirements Planning Enhancements (SP0)

- an item level switch in **SHOP.LOAD/DISPATCH.INQ** (default to **SFC.CONSTANTS**) determines whether the order/plan quantities or converted quantities appear on reports when routing units of measure are used
- gross and net capacity by period added to the **SHOP.LOAD.SUM.WK** and **SHOP.LOAD.SUM.MTH** EOT Viewer reports

New Material Requirements Planning Order Policies

New Order Policy S (Split Lot-for-Lot) (SP2)

- This new order policy allows multiple plans to be linked to a single sales order delivery line item.
- This capability is very useful for those master scheduled items that are planned via master production rate-based scheduling.

This order policy is similar to order policy B where a link is created from the sales order to the plan, but, unlike order policy B, order policy S does not require a match on date and quantity in order to maintain links.

New Order Policy C (Custom Order Policy) **(SP1)**

- This new order policy invokes user-written custom ordering logic.

All other order policies and supporting sub-specifications related to these are ignored by the standard program. Material netting and analysis prior to executing the custom order policy remain unchanged.

Manufacturing - Execute

Functions Converted to Web Inquiries (SP0)

- LOOK.PO
- **LOOK.VEN**

Capture Benefit Time (SP0)

- includes the capability to capture benefit time through SFC/SFDC/ADI by assigning an earnings code to an indirect labor code, then **POST.LABOR** creates separate EARNINGS.DETAIL records for time entered using that code

This enhancement includes the addition of three fields to the **IND.LABOR.CODES** table:

- Regular Earnings Code flag
- Overtime Exempt flag
- Bonus Time flag

The **LABOR.RECON** function excludes Overtime Exempt time from automatic overtime calculations, and adds Bonus Time to regular time for the day.

Work Order - Miscellaneous

Product Groups (SP1)

- A sub-type of the P-type phantom, product groups allow finished goods items to be grouped together so they are processed through manufacturing together. A product group's sole components are finished goods manufactured parts.

Product groups are not themselves manufactured, and are not processed through inventory. When a product group phantom work order is released, a production work order for the finished goods components are automatically released at the same time and linked to the phantom parent work order in a fashion similar to how W-type phantom work orders are linked to their parent work orders. The routing on the phantom parent is inherited by the component work orders. All of these linked work orders are also assigned to a work order group.

The following functions have been modified to support processing with product group phantoms:

- **MATL.ISSUE** issues materials to the component finished goods work orders
- **WIP.RECEIPTS** receives all of the component finished goods parts into stock together
- **MOVE** allows the entire group of orders to move through WIP together
- **VOID.WP.RELEASE** voids all orders in the product group
- **WO.CLOSE** closes all orders in the product group together

Component Work Order Requirements and Allocations (SP1)

- Two new data elements, Quantity Allocated and Quantity To Manufacture, have been added to the Picklist file to be used by the work order system. It is now no longer true that the requirement quantity used by MRP for material planning and the quantity allocated be the same number.
- Provision has been made to allow users to write custom component selection and allocation logic into the work order release process. A standard user exit is provided into which the custom logic can be written.

Parts coded in the bill of materials with a negative quantity per assembly are no longer classified

as allocated; instead, when a requirement for a negative QPA part is released to the floor, it now displays as a Quantity To Manufacture.

A new control, Whole Lot WIP Allocation, has been added to **INV.CONSTANTS** with an item level override in **ITEMS.MISC**. If the Lot Tracing module is enabled, and if FIFO inventory control is also enabled, the system will pick all of any eligible lot if it picks any. This may produce a condition where more of a lot is allocated than is actually required for a specific work order.

Change Work Order Enhancement **(SP0)**

- **SOP.CONSTANTS** setting allows work order dates for parts linked to sales order deliveries to be moved in **CHG.WORK** rather than forcing delivery dates to be changed in **SO.ENTRY**

Work Order Release **(SP0)**

- **WP.TO.START** provides selection by planner and saves selection lists by user
- **MFG.RELEASE** processes based on lists saved by user

Purchasing Enhancements

PURCHASE Enhancements

- default FOB definable by vendor **(SP0)**
- ability to rebuild delivery dates **(SP0)**

A default delivery date may be entered at the purchase order header level. The first delivery date for each line item will default to this date; the user may override the default. If the header level default delivery date is changed and the rebuild dates option is chosen, the delivery dates will be rebuilt to match the new default delivery date.

The rebuild checks to see if the first delivery date for each purchase order line item matches the old default delivery date. If so, the delivery date will be changed to the new default delivery date.

- **CLOSE.ORDER** option added that closes all open line items. **(SP2)**

Requisition Enhancements **(SP2)**

- **RQN.ENTRY** modified to prompt for a ship-to address at both the requisition header and line item levels.

The automatic generation of requisitions via **MRP.CALC** was also modified to check for a ship-to address at the item level. If found, the address is populated on MRP.CALC-generated requisition detail records.

When converting requisitions to purchase orders, the ship-to address becomes part of the criteria for grouping requisition lines on a single purchase order. The ship-to address follows to the purchase order.

- An optional date range and facility selection added to **CONVERT.RQN.TO.PO**.

This allows the user to convert only requisitions with a requested delivery within a selected date range, or only those requisitions for a specific facility.

- A new **RQN.CONSTANTS** option permits the system to create multiple deliveries on a purchase order line when combining multiple requisition lines on a single purchase order line.

The conversion process via **CONVERT.RQN.TO.PO** creates the purchase order line with a

delivery for each unique delivery date found in the combined requisition lines. The requisition price is used, so each delivery may have a different price. Where multiple requisitions are found for the same date, the quantities are combined and the lowest price is used.

Purchasing - Miscellaneous

- **DUP.PO**, a new function, allows duplication of purchase orders. New purchase order dates and vendors can be input prior to update. **(SP0)**
- **PO.PRINT – FORM.BUILD** now includes optional fields that were previously hard coded. The form is now significantly more tailorable (comparable to invoices, sales orders, etc.) without Basic programming. **(SP0)**
- **PO.HISTORY** now displays both stock and purchasing unit of measure for the quantity. **(SP0)**
- **RCVNG.RPTS.BY.DATE** is a new standard system report. **(SP0)**
- **PQ.PRINT - FORM.BUILD** now includes the option to fax the purchase quote provided the FAX module is enabled and the vendor is flagged to fax purchase quotes. **(SP2)**

PO Receiving Reports **(SP0)**

- includes a prompt for specific RCVR IDs for which to print receiving reports

This is an optional prompt in **RECEIVING.RPTS**, so the user can enter nothing and continue to run the function as in the past. If one or more RCVR IDs are entered, the receiving report number and facility code prompts are bypassed.

Return to Vendor Enhanced **(SP1)**

- new system level switch in **PO.CONSTANTS** allows material returns to a vendor without reopening the original purchase order while still recording costs and inventory transactions

This also applies to drop ship purchase orders from sales orders.

Truck Scheduling and MTOs **(SP0)**

- enhanced to extend the functionality that is used to ship sales orders to ship MTOs to other facilities, including remote manufacturing and distribution facilities
- enables a truck load to contain both sales order shipments and inter-facility shipments

New functionality includes:

- MTOs can be used with Truck Scheduling in the same manner that sales orders are processed.
- MTOs can be processed via ADI in the same manner that shipments and receipts are processed.

MTO.ENTRY allows volume and weight totals to be accumulated in a real time mode as MTO line items are added.

Manufacturing - Control

Function Converted to Web Inquiry (SP0)

- **LOOK.RESERVATIONS**

Material Transfer Orders - Miscellaneous

MTO Release User Level Processing Control (SP0)

- User level processing control added to **MTO.TO.RELEASE** (saves selection lists by user) and **MTO.RELEASE** (processes based on lists saved by user).

Late Transfer Orders (SP0)

- New function **LATE.MTO** reports material transfer orders late as of a user input past due date, similar to function **LATE.SO**.

Backorder Options Supported (SP0)

- MTO shipments processing now supports two backorder options 1) Cancel backorder quantities for unshipped MTO balances, and 2) Create new MTOs for unshipped MTO balances.

Previously, all unshipped balances remained as backorders on the original MTO. This change affects the operation of the existing **MTO.SHIPMENTS** function, as well as the new ADI version of MTO shipments developed for the Truck Scheduling application.

The options are controlled at three levels:

- A system level default option in **FAC.CONSTANTS**.
- A facility level override default option in **FACILITIES**.
- A run-time MTO-specific override option in **MTO.SHIPMENTS** (and the ADI version), which defaults initially based on 1 and 2.

Web-based MTO Receipts (SP2)

- New function **MtoReceiptEntry** allows the user to receive material transfer shipments with the receipt quantity, lot and serial numbers via the Web.

Print Faxed MTO Acknowledgements (SP2)

- An option to print faxed MTO acknowledgements going to a receiving facility via **MTO.PRINT** has been added in **FAC.CONSTANTS**.

Inventory Reservations

- can now be made based upon sales demand only ("S" option) vs. all demand (SP0)
- reservation detail can now be accessed from item activity (**ACTIVITY**) via the time bucketed view with drill-down to sales or work order inquiries (SP2)

WIP.RECEIPTS (SP0)

- EOT Viewer exception report available
- allows components of W-type phantoms to be automatically backflushed when a parent work

order is received after first issue

Multiple Facilities Processing

- facility selection added to **WO.TO.CLOSE** and **AUTO.WO.CLOSE (SP0)**
- new Web function, **StockStatusFacilityLocDetails**, displays inventory balances for the current facility (and facilities from alternate databases if this feature is enabled) and includes information such as on-hand and allocated balances for each location in the facility **(SP2)**

Cycle Counting by Location **(SP2)**

- a new inventory accuracy audit technique where a certain number of locations are counted every count day with each location counted on a defined frequency throughout the year
- the focus of the count, recount, reconciliation and analysis procedures is by location instead of by part to allow some environments where the need for accuracy at the part number level never finds a time (a cutoff) to count their parts cyclically

The following new functions have been created to support cycle counting by location:

- **LOC.ZONES** defines the location zone/area codes used to specify the zone or area to which a location or other physically fixed item belongs. This is the function where the user also specifies the number of times per year locations coded with this zone/area code are counted. These location zone/area codes are then assigned to locations in **LOC.MAINT**.
- **PLAN.LOCS.TO.COUNT/COUNT.LOC** selects the locations to count automatically or manually respectively. Manually selected locations have a higher priority than those selected by the system.
- **LOC.CUTOFF** captures the on-hand data of the selected items considered available to count and saves the data for future count comparison.
- **REVERSE.LOC.CUTOFF** deletes the count comparison on-hand data **LOC.CUTOFF** captured in the event the saved on-hand data is incorrect or out-of-date.
- **CC.LOC.HISTORY/CCH.DET.BY.LOC** prints or displays cycle count history for counted locations.
- **DB.AUDIT.CC** audits cycle counting for past-due items whether cycle counting by part or cycle counting by location. Past-due items are reported and may be optionally selected for counting. The count priority is high, the same as if they were manually selected.

The following functions have been modified to support cycle counting by location:

- **CC.CONSTANTS** now includes system control parameters for cycle counting by location.
- **COUNT.ENTRY** now provides an up-front screen that lists all parts found within the location. In addition, parts may be added to the list.

New Function for Rapid Creation of Maintenance Work Orders **(SP2)**

- the new function, **MNT.EXPRESS.WO**, combines the maintenance request, request approval and scheduling functions into a one-step process
- option to print the new work order

The new function is designed for quick entry of maintenance work orders and assumes the user is permitted to create maintenance work orders without going through the standard approval process.

Lot Tracing and Serial Number Tracking Web Enhancements **(SP2)**

- Serial number information added to the Web inquiries **StockStatusByLocByLot**, **StockStatusByLotNumber** and **LotTransactionHistory**.
- Two new Web displays of lot traced work-in-process. **LotTracedWip** displays all items that are lot traceable and in work-in-process. **LotTracedWipByItem** lets the user input the item to view.

Sales and Marketing

Manage 2000 customers continue to come up with great ideas for enhancements to these critical applications, and Manage 2000 continues to grow as a result.

Functions Converted to Web Inquiries (SP0)

- LOOK.SO
- **LOOK.SQ**
- **LOOK.SCON**
- WHEN.AVAIL

Credit Card Interface

Standard Real-time Interface to the Credit Card Service Provider VeriSign® (SP0)

- Allows the entry of credit card information, passing the information to VeriSign and receiving the authorization or rejection of the transaction back from VeriSign.
- Encrypts all credit card numbers stored in the database for security.

Several new functions have been added to support credit card processing. Processing options for the interface are controlled by **CCP.CONSTANTS**. New tables include **CREDIT.CARD.TYPES** and **CCP.ACTIONS**.

The **CUSTOMERS** function allows entry of a credit card type, number, expiration date and verification code. The customer level information is used as the default for transactions such as sales orders, invoices and credit memos.

The customer payment terms code is used to determine whether to require entry of credit card information for a sales order, invoice or credit memo. A new field in **PAYMENT.TERMS** allows flagging a terms code as credit card payment terms. When an order, invoice or credit is entered, the terms code and **CCP.CONSTANTS** are checked to determine whether to require credit card information to be entered.

The user may enter credit card information in **SO.ENTRY**, **INVOICE.ENTRY**, and **CM.ENTRY**. The credit card type and number default to the information on the customer record, but may be overridden. The types of credit card transactions that are processed are controlled by the **CCP.CONSTANTS** options for each transaction type. For example, in **SO.ENTRY**, the user may create a 'reserve' transaction that will reserve the sales order amount against the customer's credit card balance. **INVOICING** may then create a 'ship/delayed capture' transaction to actually charge the invoice amount to the credit card.

Credit Card Processing for Web-based Sales Order Entry and Sales Quote Entry (SP2)

- Credit card information may be entered for a Web-based sales order (**SalesOrderAddition**) at order entry time.
- Sales quote entry supports credit card processing. The credit card number is verified as a valid number in sales quote entry, but no other information is transmitted to VeriSign. When the quote is converted to a sales order, credit card information will follow where further actions occur.

Credit Card Authorization at Time of Allocation (SP2)

- Credit card transactions may now be transmitted and the amount reserved when allocating sales order shipments. If the credit check fails, the transaction is placed on credit hold.

Credit Card Transaction Reports (SP2)

- **CREDIT.CARD.TRANS** report lists credit card transactions with a transaction date within a user-specified date range and document type.
- **CREDIT.CARD.TRAN.LOG** report lists credit card transactions submitted to the credit card service provider for action including reserve, charge and credit transactions.

SO.ENTRY/SQ.ENTRY Features

Invoice Complete Option (SP0)

- The invoice complete option allows the user to flag a sales order to be invoiced complete. This option prevents sales order invoices from being created until the entire sales order has been shipped, then a single invoice will be issued for all shipments against the sales order. A new field for invoice complete in **CUSTOMERS** is used as the default in sales order and quote entry. The invoice complete flag can be overridden at the sales order or quote level.

Price Freeze on Sales Orders (SP0)

- A new setting in **SOP.CONSTANTS** freezes the pricing on a sales order after an invoice has been issued for any portion of a delivery. This is useful at times when it is necessary to change the quantity of an unshipped balance, for example, in order to ship the balance remaining from another facility. With this new constant set, the original quantity discounting will remain in place.

Item Cost Miscellaneous Displays (SP0)

- New Miscellaneous Displays are now available to show item cost information for each individual cost set (Accounting Value, Current, Last Actual, Average Actual, Standard, and Simulation). These can be implemented at Manage 2000 customer discretion by tailoring **SO.ENTRY**.

Alternate Ship-to (SP0)

- A new field (Alternate Shipping Customer) allows entry of an alternate ship-to to allow sales to be tracked by distributors' end customers using classic Manage 2000 reporting tools or Analyze 2000. This field has no relationship to the bill-to or ship-to customer fields, but must be a valid customer. This field is populated in files updated in the following areas: sales quote, sales order, accounts receivable, serial history when applicable and sales analysis history files.

Sales Order Line Sets (SP1)

- Allows the user to control the order entry and shipment processes for a group of sales order lines.
- Using a new option "OS", the user defines group elements such as facility, customer request date, ship-to code and allowed installer.
- A new field in line item entry flags sales order lines as part of a set. Group element information defaults to the sales order line items with some element modification allowed.
- Two new Web inquiry functions, **SoLineSets** and **SoLinesByLineSet**, display sales order line set information.

Approved installers (vendors) may be assigned to sales orders and thus be used to perform equipment installations. Approved installers of equipment sold are flagged in **VENDORS**. The lookup path and dictionaries used to find a list of installers for order line sets are defined in **SOP.CONSTANTS**.

Order Level Price Effectivity Date (SP1)

- New field on the header level and sales order line set level allows the user to control the "price as of date" that is used to determine the catalog price and special price quote effectivity.

Related Sales Order Lines (SP1)

- Sales order lines can now be related to a "base" sales order line. Allocation status of the base sales order line determines the allocation status of related lines.

Base line requirement field added to **ITEMS.SOP**.

New customer purchase order line forms are sorted by base line first followed by related lines.

Customer Purchase Order Lines Associated to Sales Order Lines (SP1)

- New fields at the header and line item level allows customer purchase order lines to be associated with sales order lines. Sales order information sorted by customer purchase order line is viewable via new forms and a new Web inquiry function.

The new Web inquiry function **SoLinesByCustPoLine** displays sales order information with the line item detail displayed according to customer purchase order line item detail. Available as a stand-alone function or may be used in a Manage 2000 software object and attached to any screen in sales order entry.

INVOICING verifies that all purchase order lines included in a shipment to be invoiced have been shipped complete.

Sold-to - New Customer Relationship (SP1)

- A new customer relationship for sales and accounts receivable processing that determines the allowable bill-to customers for orders.

The sold-to customer relationship is defined in **CUSTOMERS**. Sold-to customers may be entered in entry functions for sales orders/quotes, invoices, credit memos, and return material authorizations.

The sold-to customer may also be used along with the bill-to and ship-to customers in defaulting information from the customer records to the sales order.

The sold-to customer relationship has no effect on an existing major/minor customer relationship. Credit checking and accounts receivable processing are not impacted.

Ship-to Source Option (SP1)

- A new field, Ship to Source, allows the user to specify whether the ship-to code and/or address is linked to the sold-to customer or the bill-to customer when a sold-to customer is assigned.

The ship-to source may be defined at the header level, line item detail level, or both.

All functions, reports, and inquiries that use or display ship-to customer information are updated to respect the new ship-to source and also use the appropriate ship-to customer.

Sales Order Price Authorization (SP2)

- Sales order or quotes whose lines exceed an allowed variance between the net unit price and the gross unit price are placed on hold. The workflow messaging system notifies an authorized user that lines are placed on hold. Until the lines are approved, quotes are not converted to orders, acknowledgements are not printed, the order is not allocated, and sales revenue is not posted. Once all lines on a quote or order are approved, the quote or order is removed from price hold and the material requirements planning requirements hold is released.

Fields for positive and negative variance amounts and percents were added to the **PRICE.CODES** table.

The order/quote entry, duplication and EDI (i.e., 840 and 850 transactions) functions have been modified to perform pricing checks.

New price approval functions created - **APPROVE.SO.PRICES** and **APPROVE.SQ.PRICES**. Each line needing approval displays along with the authorized price, the actual price, the variance, and the approval status.

SQ.ENTRY, **SO.ENTRY**, **SO.PRINT** and **SQ.PRINT** modified to skip printing of acknowledgements for quotes and orders placed on price hold.

SO.ENTRY, **SHIPLISTS** and **CHG.SHIPLISTS** are now prevented from allocating sales orders on price hold.

Drop Ship Purchase Order Credit Checking Process (SP2)

- Drop ship purchase orders entered in sales order entry now has the system verifying if the customer is set up to bypass credit checks. If the customer is flagged to bypass credit checks, a purchase order is created even if the sales order or customer is on credit hold.

This is consistent with the allocation process for non-drop ship line items.

Sales Order Processing - Miscellaneous

Credit Holds and Sales Work Order Creation (SP0)

- A new **SOP.CONSTANTS** option has been created to allow automatic linking of credit holds and MRP requirements holds. When this option is enabled, a sales order that is put on credit hold by the system will also be flagged to hold MRP requirements. This will prevent MRP from planning for the sales order until the credit and MRP holds are released. This also prevents the creation of work orders from **SO.ENTRY** for sales orders on credit hold.
- The sales order must be approved for credit in the **CREDIT** function. When the sales order is approved, a flag is set indicating that the MRP requirements hold should also be released. The user will receive a screen message telling them to run the **RELEASE.SO.HOLD** function. This new function will update the MRP hold flags for the sales order, post the requirements for planning purposes, and create work orders where necessary.

Sales Quote Conversion (SP0)

- Processes will not allow sales quotes whose date has expired to be converted to sales orders in **SO.ENTRY** or **CONVERT.SQ.TO.ORDER** if a new field in **SQP.CONSTANTS** is

turned on.

Sales Representatives

- **SALES.REPS** includes an inactive flag. When this flag is set, users are prevented from entering sales orders or invoices associated with the rep. **(SP0)**
- Sales representatives assigned to a customer may be assigned a date effectivity range. These dates are checked by the system when assigning a default sales rep to sales orders, sales quotes, invoices, etc. A new function, **REPLACE.REP**, may be used to change the sales reps assigned on existing sales orders and quotes providing the sales reps are currently effective for the assigned customers. **(SP1)**
- A new report, **OPEN.SO.COMMISSIONS**, displays pending commissions due on open sales orders. The same commission calculation used in the invoicing functions is used in this report. **(SP2)**

Item Sales Exclusion **(SP0)**

- New function allows combinations of customers and items to be excluded from sales order entry. The two level lookup table operates similarly to GL account lookup tables.
- The name of the new function is **ITEM.SALES.EXCLUSION**.

Customer Portal Enhancement **(SP0)**

- includes monthly sales data for graphing on the CustomerPortal

Sales Order/Quote Header Defaults **(SP1)**

- New function allows the user to define the sequence of customer records to use for sales order and quote header level defaults. Up to three levels of customers are checked (bill-to, ship-to, sold-to).
- The name of the new function is **SALES.DEFAULTS.PARAMS**.
- In addition to sales order and quote entry functions, invoice and credit entry functions (**INVOICE.ENTRY** and **CM.ENTRY**) use the default parameters for ARH fields that correspond to sales order header (SOH) fields included in the table.

Web-based Sales Order Entry Enhancements **(SP2)**

- Credit card information may be entered at order entry time.
- Automatic special price quote lookup has been added.
- Inventory reservations now allowed for P type line items (subject to some conditions) if inventory reservations are enabled for the bill-to customer.

Web-based Shipments **(SP2)**

- New function displays allocated shipments for a defined sales order via the Web. Upon selection of a shipment, the user may accept or change shipment quantity, locations, lot or serial numbers.
- The name of the new function is **SoWebShipments**.
- Web-based shipments may be accessed through the Customer portal via the new

CustSoAllocations Web function.

Customer Ship-to/Bill-to Defaults (SP2)

- The EDI 856 transaction flag in the customer record, which indicates if this transaction may be transmitted to the customer, can now be set at the bill-to level, ship-to level, or both. This allows for specific ship-to overrides.

When sale shipments are made, the system first checks the ship-to customer, then the bill-to customer. If neither have this flag enabled, 856 transactions will not be transmitted to the customer.

- Customer document options, used when printing documents such as sales orders and shiplists, are now available to the ship-to customer to allow the user to define form options for the ship-to customer. These functions first check the ship-to customer, then the bill-to customer as to what option to use.

When determining the ship-to customer to use, the ship-to on the sales order header level is used in most cases. Instances where the line level ship-to is used are those functions that print information for a specific shipment such as shiplists, packslists and bill of lading.

Shiplist Fax Option (SP2)

- A new option in **SHIPLIST.PRINT** lets users choose what number to fax shiplists to if shiplists are faxed.

EOT Functions Converted to PWS Functions

- allows functions such as **CUSTOMERS (SP0)**, **VOLUME.DISCOUNTS (SP0)**, and **CONTACTS (SP1)** to be maintained in the same fashion a majority of Manage 2000 functions are maintained

The function **CUSTOMERS** and related functions such as **CUST.COMMENTS**, are now **SCREEN.BUILD** functions.

VOLUME.DISCOUNTS is now an MT500 function. The EOT function has been removed. The **LOOK.VOLUME.DISCOUNTS** function has also been changed to an MT500 function.

Sales Tax Interface with Vertex® (SP2)

- allows the user to accurately calculate sales taxes at the line item level and for extra charges through a bi-directional interface with Vertex Sales Tax *Q Series™* and Manage 2000 based on calls to the TaxMan API supplied by Coella Consultants Limited
- allows for automatic analysis of each transaction to determine whether the transaction is intrastate or interstate, the taxing jurisdictions involved, city/county partial/full override rates, the taxability of each line item (using exception information specific to the company and applicable maximum tax base and excess amounts) then retrieves the applicable tax rates, calculates the tax amounts, and returns these amounts to Manage 2000 for invoicing
- uses state level geographic tax codes as a basis for automatically adding additional state/county/city codes based on customer or document address information
- supports "what-if" calculations that allow users to return from Vertex accurate tax information without recording the tax as well as recording actual sales taxes within the Vertex database for tax reporting purposes

New function **CONVERT.TO.VERTEX** updates existing database files with Vertex geographic tax codes.

Customer Relationship Management

Some Service Management development was also included in recent 7.0 service packs. To take full advantage of much of this new functionality requires 7.1.

Clientele - A Fully Featured and Field Proven CRM Product (SPO)

- has the ability to populate the Clientele database with parts, sales orders, pricing, customers tables
- has the ability to import customers and sales orders from Clientele
- allows the option to calculate prices and taxes in either Clientele or Manage 2000
- allows Manage 2000 sites to take advantage of the following sales and marketing features of Clientele:
 - Contact Management
 - Lead and Opportunity Management
 - Quoting and Order Management
 - Marketing Program Management
 - Forecasting and Pipeline Management
 - Workflow (Clientele Conductor)
 - Sales Force Automation (Clientele Connector) - Synchronization

Function Converted to Web Inquiry (SPO)

- **LOOK.CONTRACT**

CASE Features (SPO)

- CASE Web portal enhanced to include timeline and related items with hot links
- alerts the user if attempting to enter duplicate cases for the same serial number, item number and customer number
- access to the Case, Sales Order and When Available web portals from the CASE screen to provide much better supporting information about the case
- allows a Depot Service Order to be created in the case entry function

General Accounting

Greatly expanded drill-down capabilities have been added to the major accounting inquiry applications, largely by taking advantage of Web technology.

Accounting Documentation (SP0)

- the Cost Transfer Summary and General Accounting documents have been merged into a new and enhanced document , available online on the General Accounting (GA) menu, and that includes updates and the addition of new sections

Functions Converted to Web Inquiries (SP0)

- LOOK.AR
- **COA.INQ**
- **GLT.INQ**
- **AP.VENDOR.INQUIRY**
- **INVOICE.INQUIRY**

New EOT Viewer Output (SP0)

- allows output from the functions listed to be directed to the EOT Viewer, thus significantly enhancing usability for accounting professionals
 - **AUDIT.GLT**
 - **PRINT.FACTORS**
 - **ENDING.AP**
 - **ENDING.AP.AGED**
 - **RQN.APVLS.INQ**

GL.COA.MAINT (SP0)

- includes a call to the ECA.UPDATE subroutine that could reduce statement reconciliation efforts

For example, a site can add an ECA to remind users to update financial statements after the chart has been maintained.

New Drill-down Capability in TB.ACT.CLOSE (SP0)

- takes advantage of Web technology by including extensive drill-down displays

Accounts Payable Remit to Vendor (SP0)

- includes support for a remit to vendor in the accounts payable system
- references the remit to vendor on the invoice created for the purchase (minor) vendor, and when the invoice is paid, the check will be issued to the remit to vendor
- displays the remit to vendor as well as the invoice vendor in many reports

The remit to vendor relationship is similar to the major/minor customer relationship in the sales and marketing areas.

A remit to vendor may be assigned in the **VENDORS** function. The remit to vendor is not used during the purchasing cycle or in **PO.RECEIPTS**. When the accounts payable invoice is entered, the remit to vendor from the VEN record will be assigned to the AP invoice record.

Virtually every function in the AP application, as well as **VENDORS**, has been modified to support this feature. The remit to vendor number and name is displayed in many data entry screens. Vendor history is kept for both the invoice vendor and the remit to vendor.

Accounts Payable (AP) Miscellaneous Charges to Work Orders (SP0)

- allows the same work order to be charged multiple times on the same AP invoice which eliminates the occasional problem of having to enter multiple AP invoices for the same work order
- affects the following functions:
 - **MISC.PAYABLE**
 - **ADJ.PAYABLE**
 - **AP.MANUAL.CHECK**
 - **PO.PAYABLE**

Enhanced Selection Criteria in Key AP Reports/Inquiries (SP0)

- makes divisional AP easier to implement and support in Manage 2000
- affects the following reports with the enhancement listed:
 - **SELECT.UNPAID.INV** and **SELECT.INV.BY.VENDOR** can be selected by AP accounting code.
 - **AP.CLEARING** can be selected by clearing account number. (This report also supports report option "P" which includes Open and Partially invoiced or paid receipts.)
 - **ENDING.AP** and **ENDING.AP.AGED** can be selected by AP account number.
 - **PAID.VEN** can be selected by date range.

Payable Functions Enhancements

- **PO.PAYABLE** displays the item number or GL account number referenced on the purchase order line item **(SP0)**
- Authorized users may put a negative invoice on hold in **MISC.PAYABLE (SP2)**

Only users defined in **PAYABLE.APPROVAL** are allowed to change the invoice approval/hold flag. For all other users, invoices are placed on hold regardless if the invoice total is positive or negative.

Cash, Deposit and Credit Applications

- **APPLY.CASH** has a new customer information display option, Division Code. Previous options were limited to Purchase Order or Sub Customer. The information to be displayed is defined at the customer level. **(SP0)**
- Enhanced the automated cash application bank lockbox process to locate a customer based on an ABA routing number. Previous options were customer or invoice number. A new field ABA Routing Number added to **CUSTOMERS. (SP1)**
- **APPLY.CASH** now allows the user to override the customer's terms code assigned to

chargebacks. (SP2)

- Accounts receivable batching enhanced to allow the user to reopen a closed batch. (SP2)
- Negative accounts receivable batch totals are now permitted. This feature is useful for those times a check is reversed. (SP2)

INVOICE.ENTRY (SP0)

- supports terms discounts on split payment invoices. Parameters are set up on the SPLIT screen of **PAYMENT.TERMS**

Financial Reporting Interface with FRx[®] (SP2)

- builds and maintains GAAP-compliant financial reports and complex ad-hoc management reports fast by automating the tasks associated with financial reporting - gathering, verifying and categorizing data coming from the general ledger
- using FRx's Integration Designer tool, extracts financial information from Manage 2000 via ODBC, keeping the integrity of the financial data intact, and then, using FRx drill-down capabilities via ODBC calls, allows on-demand extraction of supporting detail (account and transaction detail) subject to predefined security controls
- lets the user define report templates where the reporting structure is apart from the chart of accounts
- consolidates financial information from multiple databases, platforms, and servers

Interface

Automatic Data Input

Labor Transaction Processing (SP0)

- **BTI.INTERFACE** function upgraded to process labor transactions, thus, a single phantom can process all ADI and SFDC transactions

The function **TRANSACTION.HANDLER** is no longer needed and has been removed.

Modifications and new functions associated with this change include:

- **MONITOR.INTERFACE** can now be used to monitor erroneous labor transactions.
- **SFDC.CONSTANTS** includes a default concentrator name for non-multi-facility companies.
- **TRANSACTION.MAINT** is now used only to process the previous Option 2, "Other SFDC Transactions." Other functionality is now available in the new functions below.
- **ADI.LABOR** - Correct labor transactions
- **ADI.PO.RECEIPTS** - Correct purchase order receipt transactions
- **ADI.PROD.RECEIPTS** - Correct production receipt transactions
- **ADI.WIP.RECEIPTS** - Correct work in process receipt transactions
- **ADI.ROG.RECEIPTS** - Correct repetitive order group receipt transactions

Backorder Processing (SP2)

- **ADI.SHIPMENTS** modified to process backorders where the user indicates backorder handling options should be applied to the shipment once shipment information has been completely entered. This is similar to the backorder processing capability in **SHIPMENTS**.

Electronic Data Interface

Additional transactions are planned in future Manage 2000 releases and service packs. For a successful implementation of the EDI module and the EDI transactions, specialized consulting is required.

New Transactions (SP0)

753 Transaction - Request for Routing Instructions (Outbound)

- provides a means for a supplier to send requests for shipment validation and routing information to its customer
- alerts the customer that the items ordered are ready to ship, and allows the customer to quickly verify that the shipment conforms to the order (e.g., that quantities and shipping dates are correct)

Manage 2000 supports the outbound logic for this transaction.

754 Transaction - Routing Instructions (Inbound)

- enables customers to convey shipping information to the supplier, including final ship to destination and necessary shipping notes

Manage 2000 supports the inbound logic for this transaction.

Enhanced Transactions (SP2)

- Automatic special price quote lookup has been added to the 840 and 850 inbound transactions.
- The inventory reservations option has been added to the 850 inbound transaction. This allows inventory reservations for P type line items (subject to some conditions) to be posted if inventory reservations are enabled for the bill-to customer.
- Modified the 832 outbound transaction to exclude price catalogs for items that have an engineering status of NONE or NO SO. The report **PRINT.CATALOG.PRICES** now includes the engineering status code.

UCCnet RCIR (SP2)

Phase 1 development - an interface to the UCCnet Registry Catalog Item Registry (RCIR).

- All required, and several of the more common optional data elements included in the RCIR, added to the standard system.
- New functions maintain Global Location Number (GLN) data, Global Trade Item Number (GTIN) data, and Registry Catalog Item Registry (RCIR) data.
- Necessary validation tables established of which many are pre-loaded with correct codes.
- A basic RCIR data-export utility created, designed specifically to operate with the designated system EDI provider.

Tools

This section includes Analyze 2000 and new Tools features and functionality. Tools is categorized by the type of user - system user or technical user.

Analyze 2000

Business performance reporting describes a broad range of applications and tools whose common purpose is to transform the massive amounts of data that flow through business systems into useful information. The best business performance reporting systems available today take into account the information needs of every functional area in a business.

Analyze 2000 uses MITS[®] - an inexpensive, easy-to-use, yet powerful and flexible, business analysis solution - that is seamlessly integrated into Manage 2000. MITS, developed by MITI (Management Information Tools, Inc.), is a tool that gathers, manages, distributes, and analyzes data for improved strategic and tactical decision making. This means that everyone from executives to the AR/AP clerk will have fast information access to the data they need.

Refer to the Analyze 2000 how-to course for hands-on exploration of data in standard Analyze 2000 reports as well as instruction on how to create new applications. System administrator responsibilities are also reviewed that includes steps on implementing this application.

Features and Benefits

- Flexible data exploration
- Drill-downs to Manage 2000 Enterprise Knowledge Portals
- Column manipulation
- Filtering
- Ranking
- Highlighting
- Export to Excel
- Security
- No connectivity issues (i.e., no need for ODBC or secondary databases)
- Inherently multi-value oriented
- ECL command line interface

Capabilities

Manage 2000 has long supported business performance reporting, but in 7.1, BPR capabilities can be made available to all users, not just to executives or high-level analysts. To facilitate organization-wide Analyze 2000 implementation, Manage 2000 7.1 includes:

- System administration functions to create, manage and update MITS software accounts.
 - **CREATE.A2K.ACCT** initializes a Manage 2000-friendly MITS environment
 - **A2K.POOL.BUILD** provides ease of maintenance of MITS data pools, and promotes synchronization of the MITS database with user accounts
 - **A2K.UPDATE** keeps MITS accounts up-to-date with other Manage 2000 software and database changes
 - **A2K.APP.TYPES** defines and controls how an application will act and be processed
 - **A2K.APP.OPTIONS** controls the presentation and transformation of data related to all applications
- Out-of-the-box MITS-based reports (flash screens) give Manage 2000 customers a head start. These functions are designed to be used as-is, but also with tailoring in mind.
- Training and other documentation to assist both system administrators and end users.
- Manage 2000 Helpline and custom code support.
- Using the security features of MITS, an accounting department can make receivables information available to regional managers over the Web, filtering the available information by region, using a single application (cube).

- Sales analysts can build their own reports based on what they need to know on a given day, without creating an information systems staff emergency.
- The same applies to inventory analysts.
- Analyze 2000 reports can be added to Manage 2000 menus.

Analyze 2000 Applications and Flash Screens/Reports

Following is a list of Analyze 2000 applications and reports available in Manage 2000 Release 7.1. Many more are planned. Run **SHOW.A2K.APPS** for a complete list of Analyze 2000 flash screens/reports.

AR.AGING (SP0)

AR.AGING allows accounts receivable aging information to be viewed by customer and currency. Finance can use Analyze 2000 to effectively produce the bottom-line reports and overall picture on which the business lies.

- Accounts Receivable Aging - Base (Customer)
- Accounts Receivable Aging - Currency (Customer)

CASE (SP0)

CASE provides call center analysis using a wide range of metrics covering areas such as performance (e.g., time to open/close calls), and hours used (by representative or customer). Reports are designed to lend visibility to trends in customer activity, representative productivity, and overall performance for use in determining necessary improvements, and for planning and budgeting.

- Call Center Customer Analysis
- Call Center Performance Less Suspended Clock Hours
- Call Center Performance Less Suspended Work Hours
- Call Center Performance Work Hours
- Call Center Representative Hours Used

SALES.ANALYSIS (SP0)

SALES.ANALYSIS brings options for analyzing bookings, billings, and shipments to the user without the need for programming and system tailoring. Analysts have instant access to an almost unlimited number of drill down options and column displays. Cubes are available for shipments and gross margin analysis. The cube contains a complete set of numbers for both bookings and sales invoices along with book-to-bill ratio column sets.

- Gross Margin Analysis (Sales Code)
- Gross Margin Analysis (Sales Person)
- Sales - Rolling 12 Periods (Sales Code)
- Sales - Rolling 12 Periods (Sales Person)

SALES.BACKLOG (SP1)

SALES.BACKLOG allows the user to analyze their rolling sales backlog using a wide range of metrics covering areas such as backlog prices, costs, currencies and gross margin analysis.

- Sales Backlog - Rolling 12 Periods (Sales Code)
- Sales Backlog - Rolling 12 Periods (Sales Person)

INVENTORY ACTIVITY (SP0)

INVENTORY ACTIVITY includes five major cubes and 14 fully featured end user functions for analyzing inventory activity within and across facilities. The functions provide instant access to

valuable time phased information concerning usage, adjustment, and scrap information.

- Inventory Adjustment (ABC Code)
- Inventory Adjustment (Facility)
- Inventory Adjustment (Inv Type)
- Inventory Adjustment (Sales Code)

- Inventory Scrap (Inv Type)

- Inventory Usage Dollars (ABC Code)
- Inventory Usage Dollars (Class)
- Inventory Usage Dollars (Facility)
- Inventory Usage Dollars (Inv Type)
- Inventory Usage Dollars (Sales Code)

- Inventory Usage Quantity 12 Month (Facility)
- Inventory Usage Quantity 12 Month (Part Number)
- Inventory Usage Quantity (Facility)
- Inventory Usage Quantity (Part Number)

INVENTORY TURNS (SPO)

INVENTORY TURNS allows this vital metric to be analyzed using user specified parameters and time frames, for example, by facility for rolling twelve months.

- Inventory Turns (ABC Code)
- Inventory Turns (Facility)
- Inventory Turns (Inv Type)
- Inventory Turns (Sales Code)

QUALITY (SPO)

QUALITY includes four user functions for analyzing the outcome of manufacturing inspection. Quality trends can be analyzed by ABC code, planner, reject reason and scrap reason, thus taking major advantage of the Manage 2000 quality database files.

- Mfg Inspect Post Receipt (ABC Code)
- Mfg Inspect Post Receipt (Planner)
- Mfg Inspect Post Receipt (Reject Reason)
- Mfg Inspect Post Receipt (Scrap Reason)

VENDOR PERFORMANCE (SPO)

VENDOR PERFORMANCE consists of three major cubes supporting 12 end user functions covering the major vendor performance metrics. Purchase Inspection, Variance and Early/Late performance can all be analyzed using user defined parameters and time frames.

- Pur Inspect Post Receipt (ABC Code)
- Pur Inspect Post Receipt (Buyer)
- Pur Inspect Post Receipt (Scrap Reason)
- Pur Inspect Post Receipt (Vendor)

- Pur Receipts Cost Comparison (ABC Code)
- Pur Receipts Cost Comparison (Buyer)
- Pur Receipts Cost Comparison (Inv Type)
- Pur Receipts Cost Comparison (Vendor)

- Pur Receipts Early/Late Delivery (ABC Code)
- Pur Receipts Early/Late Delivery (Buyer)
- Pur Receipts Early/Late Delivery (Inv Type)
- Pur Receipts Early/Late Delivery (Vendor)

- Pur Receipts Early/Late Promise (ABC Code)
- Pur Receipts Early/Late Promise (Buyer)
- Pur Receipts Early/Late Promise (Inv Type)
- Pur Receipts Early/Late Promise (Vendor)

Additional Analyze 2000 Development

Following is a partial list of possible additional Analyze 2000 applications. Each of these would typically include three to six flash screens.

- More sales order reporting, including pending shipments, on time delivery, quote status.
- Advanced inventory analysis, including highly flexible inventory turns reporting.
- Shop floor activity monitoring, including labor, completions, moves.
- Payroll earnings and deduction reporting.
- Expense reporting.
- Accounts payable aging and analysis.
- More Accounts Receivable analysis (e.g., customer credit status).
- Engineering change.
- Systems use analysis.
- Master schedule.

With the 50 plus flash screens (based on 14 cubes) completed to date, and the additional work planned, Analyze 2000 development might easily add over 100 new functions to Manage 2000 after several 7.1 service packs.

Tools - System Users

The Tools features contained in this section are features that will interest all system users.

Enterprise Knowledge Portals (SPO)

Web portals were introduced to Manage 2000 in Release 7.0. In 7.1, portals run under .NET technology, using the best tools available for implementing ERP applications in a Web browser environment.

Portals development has been focused on upgrading 7.0 portals to .NET, and taking advantage of Infragistics® tools to enhance existing functionality.

In addition to converting 7.0 portals functionality to .NET, some enhancements were made as enabled by .NET and Infragistics tools. For example, graphics have been added to some pages, and sorting is more consistent between pages.

Following is a list of converted and in-process portals.

- [Item Information](#)
- [Stock Status](#)
- [Work Order Status](#)
- [Planner/Scheduler](#)
- [Master Scheduler](#)
- [Case](#)
- [Customer](#)
- [Sales Order](#)
- [Sales Quote](#)
- [Service Contract](#)
- [Vendor](#)
- [Purchase Order](#)
- [Sales Consignments](#)
- [Activity](#)
- [Return Material Authorizations](#)

A new function, [SHOW.WEB.APPS](#) , gives users a complete list of Manage 2000 Web applications.

The following Manage 2000 functions have been converted to Web pages and their old versions removed:

- **AP.VENDOR.INQUIRY**
- **INVOICE.INQUIRY**
- **LOOK.PO**
- **LOOK.VEN**
- **PO.HISTORY**
- **LOOK.AR**
- **LOOK.CONTRACT**
- **LOOK.SCON**
- **LOOK.SO**
- **LOOK.SQ**
- **COA.INQ**
- **GLT.INQ**
- **LOOK.IM.ACCESS**
- **WHEN.AVAIL**

Enterprise Workflow Technology

Event/Condition/Action (ECAs) (SP0)

- includes expanded support for complex conditionals
- both events and conditions can be evaluated in one /IF statement
- **FORM.BUILD** forms are integrated with ECA to include the form text as the body of the message

BX.INQ (SP0)

- can now be invoked from the editor

To see the recent changes to a program, enter BX.INQ at the command prompt. This launches BX.INQ and passes the current program name as the program to look up. This is useful for quickly looking up recent changes to a program.

REPORT.BUILD (SP1)

- A new option in **REPORT.BUILD** allows the user to create I-Descriptor fields on-the-fly for use in printing, sorting or selecting data. These I-Descriptors are stored with the report so they won't clutter dictionary files.

Optionally, the user can utilize the wizard that automatically creates a translate using files and dictionaries that have a relationship with the base file name, or, the user may define the I-Descriptor expression without the aid of the translate wizard.

Menus (SP0)

Upgrade to Menu Structure

- rich client type functions included in a menu, such as:
 - Manage 2000 documentation
 - External Web links
 - Internal Web links to Manage 2000 Web applications
- storage mechanism of menus and functions has been restructured
- both the maintenance of menus and the navigation of menus are affected (i.e., the same menu system now serves two types of users – rich client and Web browser)

In release 7.1, all items that can be called from a menu are now items in the function master file. The advantages to this approach are:

- Only one copy of a menu item and its description or pseudo function parameters exists.
- Entries are reusable and can easily be added to a second menu without having to remember all of the parameters.
- Maintenance of menu items is easier since everything is validated to one file. All maintenance is done using the Function Build process.
- Function security is easier to implement when everything is in one file.

Miscellaneous menu enhancements include:

- Menu line numbers are included in XML menus allowing the user to enter the line number at the address prompt in the EOT viewer.
- New menu build utility with complete search and drag and drop capability. In addition, menu

line limitation removed.

- Backslash command text now displays in a pop-up box rather than on the PWS screen.

Enhancement to Menu Search Engine

- searches documentation, function, and menus by user-defined words or by application
- access to Web-based advanced search (the advanced search may also be accessed from the ShortCuts menu via the Web)

Because of menu search engine enhancements, **SHOW.DOC** has been removed.

Form Build Enhanced (SP1)

- **FORM.BUILD** now supports a detail segments definition at the form level.
- enables users to create a new form that will print detail lines in a different sequence without creating a new form type

Optio Software Form Build Integration (SP2)

- transforms Manage 2000 business documents such as invoices, sales order/quote acknowledgements, and statements into XML format for delivery to a global network of print and digital destinations including fax, email, archive and the Web
- takes advantage of advanced form handling features of Optio including rules-based distribution, archiving and indexing of forms in PDF format, and includes images such as Auto CAD drawings as part of the form

User-Defined Options (SP2)

- new function allows users, rather than administrators, to maintain user-defined options with security still in place
- options include XML-menu format, EOT Viewer shortcuts (user-defined or menu list with option to display function description or function name), function key assignments, and PWS settings (text display and graph controls)

Formerly, many of these options resided in the **SYS.USERS** function. The name of the new function is **USER.OPTIONS**.

Tools - Technical Users

The Tools features contained in this section are features that will most interest technical users such as system administrators.

Web Platform Highlights

- Added User Name and User Information to the footer of all Web pages for easy identification. **(SP0)**
- Customers can update the standard Web footer using a standard menu instead of hard coding link references. **(SP0)**
- Administration pages allow customers to see what is happening and clear cache objects. **(SP0)**
- Added a User Preferences page that allows users to update contact information such as email addresses, phone numbers, and mailing addresses. **(SP0)**
- Compile utility grabs all Web pages and forces the .NET compile to run. (Normally, this only happens when the first user accesses the Web page.) **(SP0)**
- Fully functional using a secured socket layer (SSL). **(SP0)**
- Function level security is based on Web page name. **(SP0)**
- Transaction data retrieval throughput increased by 40%. **(SP0)**
- .NET architecture enhanced to reduce memory usage and to support Web gardens and Web farms. **(SP1)**
- Programmatic (role) filtering available in cross-referencing and searches. **(SP2)**
- User filtering available in cross-reference displays, REPORT.BUILD reports viewed on the Web, and hyperqueries. **(SP2)**
- Direct exports to Word and/or Excel for hyperqueries and REPORT.BUILD reports viewed on the Web. **(SP2)**
- Support for superseding, substitution and synonym processing for items. **(SP2)**
- Significant speed improvements (10-15 times faster) in cross-reference searches, building REPORT.BUILD reports viewed on the Web, hyperqueries, and advanced portal searches. **(SP2)**
- Users with a developer role have additional tools for debugging Web pages. An event log page records all messages handled by the Web pages. Dependencies pages (Web project and transaction) allows a user to view dependencies between Web projects and UniData transactions. **(SP2)**
- LISTUW, a Web-version of LISTU, allows system administrators to logoff a user. **(SP2)**
- Printer icon generates printed output of current page void of headers and footers. **(SP2)**

Web Platform Tools Suite **(SP0)**

Developer tools have always been the foundation of Manage 2000 applications. A comprehensive tool set is being developed as of Release 7.1 to integrate and optimize industry leading tools with Manage 2000. These tools, in addition to providing a solid infrastructure for standard product, are available to developers at customer sites to aid in tailoring, customizing and building additional applications. In this sense, the tradition of classic tools such as **SCREEN.BUILD** and **SCREEN.IP** remains firmly in place, but with its scope expanded to include Microsoft® and Infragistic components.

- An Add-In for loading Web Platform Components and Controls into the Visual Studio ToolBox.
- A Utility Console Application for pre-jit-compiling all pages of the Manage 2000 Web site.
- A Wizard for creating Web Functions (A small functionally coherent group of web pages managed together in a visual studio project).
- A PostBuildCommand batch program for doing housekeeping required by the .NET Framework in a large scale, highly granular software product, such as an ERP software package.
- Property Editors for selecting files and fields from IBM/U2 application server.
- A Dataset Generation Wizard for creating strongly typed datasets based on IBM/U2 application server dictionary structures.
- Data Access Components for accessing Manage 2000 Business Object data from an IBM/U2 application server.
 - roiConnection
 - roiBTO
 - roiDataAdapter
 - roiDataSet
- IBM/U2 Database Aware WebControls
 - roiTextBox
 - roiDBDropDownList
 - roiDBCheckBox
 - roiDBCheckBoxList
 - roiDBRadioButton
 - roiDBRadioButtonList
 - roiMetaData
 - roiValidator
- Manage 2000 Domain WebControls
 - roiSearchControl
 - roiHyperQueryControl
 - roiTableMaster
 - roiTMDropDownList
- Manage 2000 Dialog Framework WebControls
 - roiPopUp
 - roiCrossReference
 - roiHelp
 - roiErrorMessage
 - roiCalendar
- Extended Infragistic WebControls
 - roiUltraWebGrid
 - roiUltraWebChart
 - roiUltraWebCombo
 - roiUltraWebToolBar
 - roiUltraWebMenu
 - roiUltraWebTab
 - roiUltraWebListBar
 - roiUltraWebTree
- Miscellaneous WebControls
 - roiAlphaTabControl

- roiPagingControl
- roiXmlDataIsland
- Report Build Viewer – generates interactive Web functions based on **Report Build** specifications.
- ERPBusinessObjectService – Web Service providing access to the BTO Framework.

Many classic tools, such as **DICT.BUILD** and **MENU.BUILD**, continue to play a major role in the new development environment.

National Language Support (SP0)

Manage 2000 7.1 includes limited support for languages other than North American English.

- Release 7.1 supports use of the ISO-8859-1 character sets, thus covering most West European languages, including French, Spanish, Catalan, Basque, Portuguese, Italian, Albanian, Rhaeto-Romanic, Dutch, German, Danish, Swedish, Norwegian, Finnish, Faroese, Icelandic, Irish, Scottish, and English. Also, Afrikaans and Swahili are supported.
- This enables development, on a custom basis, to accept, store and output data in ISO 8859-1 languages – with some limitations.
- This does not add any specific non-English language and locale features to Manage 2000. The support of additional character sets provides the ability to create software for other languages on a custom basis. Epicor expects that such customization will be done by Manage 2000 customers and third parties.
- In general the features provide limited abilities for a Manage 2000 site to create custom software items and application and software data records. An example would be to use **SCREEN.BUILD** to build a custom French oriented screen, creating a UniBasic report with specific language column titles, and using **DICT.BUILD** to create data dictionary and help information. In this example, separate CM records for French language customers exist, so that the addresses, etc., can be in French. Additional software items would include data dictionaries, Web pages, documentation items, and help messages.
- Issues and limitations include:
 - Some system-software-embedded messages cannot be modified.
 - Conversion of existing data is required.
 - An alternative version of UniData is required.
 - The cost of using additional languages on a custom basis is proportional to how many areas of a system need to be modified.
 - Other potential issues include but are not limited to government regulations, mixed languages considerations, different abbreviations for “common” codes (e.g., “OEM” has a different meaning in English than in other languages), sorting rules, currency symbols, etc.

PWS Enhancements

- Implemented a new file transfer method that uses the Microsoft .NET 1.1 framework. This eliminates problems found with certain routers and VPN connections. (SP0)
- Implemented UniData device licensing to support the Manage 2000 enterprise license framework. (SP0)
- **SHOW.PWS.VERSIONS** displays the PWS version, and, in advanced versions of PWS (9.1.8.x), displays user operating system information. (SP0)
- New XML-audit for dictionaries and screen help records made possible because PWS now allows the host to run XML data, together with a schema, through the Microsoft XML parser. (SP2)

Editor Enhancements (SP0)

- A new command, BASE, exits the synonym dictionary item and displays the base dictionary item when editing a synonym dictionary.
- Replaced the EDP editor with a new epiEditor that is UniData aware. It allows editing multiple items at once, can also edit PC files, and does full syntax highlighting (compiles in place and many other options). (Requires PWS version 9.1.7.31)

New Technology Adaptation Tools

- New functions TextToXML and XMLToText convert data strings between formats. (SP0)
- **DICTS.AUDIT** function scans dictionaries and reports for errors that could produce run time errors. (SP0)
- Miscellaneous audits combined into one function, **SOFTWARE.FILES.AUDIT**. One or more of the following options available: (SP0)

- Transaction Master
- Index Control
- Table Master (Std)
- Function Master
- Table Master Control
- Form Fields
- Menu Master
- Display Control
- Message Text
- Report Build
- VOC File Entries
- Web Pages
- MITS Flash Screens
- Software Objects
- MITS Data Cubes
- Object Code Entries
- MITS POOLS
- Layout Files

- XML output capability added to EOT processor. (SP0)
- **TRACK.USER.COUNTS** and **SHOW.USER.COUNTS** functions help system administrators stay on top of system use. (SP0)

EOT applications now use UniObjects to connect to the server. When using Enterprise licensing, these no longer use an additional UniData or Manage 2000 license.

- **DICT.INQ** displays the set name for a dictionary item (SP0) and includes a new column that indicates which dictionary items associated with an attribute are considered the base item - base items are used for layout records and the XML element name (SP2).

• Debugging Enhancements

- New debugging technique that places debug data in a queue that is monitored and displayed in an application rather than require a screen for output. (SP0)

Create debug information using SendDebug subroutine. Display debug information using **DebugMonitor**.

- **DEBUG.NET** debugs applications. (SP0)

This function replaces DEBUG.EOT. User must be flagged as a developer in the contact master file. Enable EOT debugging by using the command \DEBUG to turn on the debug

flag in the SYS.USER file or selecting the Debug icon on the Web page's global menu.

- New utility, **GENEOT**, displays EOT data from a transaction that can be used to debug EOT errors. **(SP1)**

One of the real powers of this function's display is the inclusion of a Custom column that indicates what is custom for a custom dictionary, using the standard dictionary as the base. For example, the code 3 indicates conversion value.

- Resume option added to **LOAD.INDEX** in the event a previous load all files fails. The system prompts the user for a specific file the load should start. **(SP0)**
- All functions (Web pages, pseudo functions, documentation items, etc.) available from TCL, \E command, software object, or pseudo function. **(SP0)**
- New backslash commands - \COPYSET (in scrolled set, copies all entries in the current column to clipboard); \COPYALL (in scrolled set, copies all entries in all columns to clipboard and optionally include headings and hidden columns); \CUTALL (in stand-alone scrolled set, deletes all entries and places data in clipboard); and \DELETEALL (in stand-alone scrolled set, deletes all entries). **(SP2)**
- **COPY.TO.CLIPBOARD** copies a UniData record to the clipboard and **COPY.FROM.CLIPBOARD** copies contents of clipboard to a UniData record in a UniData file. (Requires PWS version 9.1.8.x) **(SP2)**
- Images and stylesheets only download from host if changes exist. This results in faster connection time when processing XML-menus. **(SP2)**
- Support for HP-UX trusted systems. **(SP2)**

Documentation

Manage 2000 Release 7.1 takes full advantage of the important technologies available to the developers of modern, fully integrated software documentation.

Documentation History

Manage 2000 users asked that our documentation...

- have a more consistent and updated format,
- contain more helpful content, and
- have a tighter integration with Manage 2000.

So, a major project was launched to...

- conduct a needs analysis,
- select the best documentation infrastructure platform,
- review all existing documentation and expand the content for clarity and completeness,
- create new step-by-step instructions to guide feature usage throughout the system,
- convert all current documentation to a new consistent format using schemas (templates) and stylesheets to control the structure and appearance of documentation,
- provide quick access to improved help at point-of-use, and
- insert meta tags throughout all documentation to allow quick document location through many different avenues.

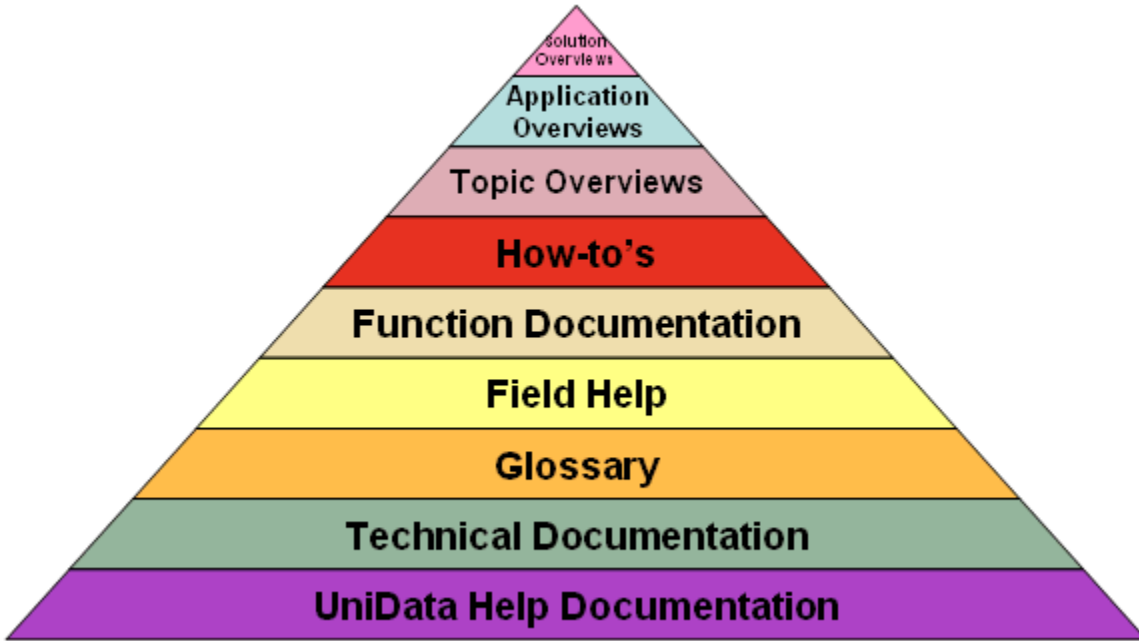
Conversion to XML

As of Release 7.1, Manage 2000 documentation is created and maintained in XML. The many advantages of this major development include:

- Availability of industry standard tools to efficiently develop and maintain high quality documentation.
- Dramatically enhanced ease of navigation, using tables of contents, drill down capability, and links to internal and web functionality.
- Enables exchange of data with external systems.
- Facilitate all the documentation projects listed in this section.
- Allows content of a document to be used in other documents. (1 document; 2 or more uses)
- Interfaces with stylesheets so content can be presented in multiple ways.
- Allows content to be tagged, and interfaces with search engines so tagged content can be easily located.
- Achieves a tight integration of many types of documents with Manage 2000.
- Intuitive for programmers.
- Excellent fit for multi-dimensional environment.
- License-free, platform independent, and well-supported.

Integrated Learning System

Manage 2000 release 7.1 includes the new 9-layer documentation system, a hierarchical integrated learning system that ranges from executive to technical levels.



Solution Overviews

- available in 7.1
- provides documentation covering industry solutions - high-level documentation that covers multiple applications/modules (e.g., BPR - Business Performance Reporting or SCM - Supply Chain Management)
- consistent content categories
 - capabilities
 - benefits
- located on documentation menus
- 14+ available

Application Overviews

- available in 7.1 in XML / 7.0 as pdf
- provides summary application (module) documentation (e.g., Bill of Materials Application Overview)
- consistent content categories
 - purpose
 - introduction
 - benefits
 - key features
 - features
 - reports and inquiries
 - online documentation
- located on documentation menus
- 50+ available

Topic Overviews

- new documentation type in 7.1 and 7.0
- provides content for key Manage 2000 topics (e.g., pricing)
- content converted from topical articles
- TO's are written either at a high level with links to related documentation or at a very detailed level
- located on documentation menus and used within other documentation (e.g., how-to's)
- many available and planned

How-to's

The how-to documentation type is made up of two categories - application how-to's and how-to courses. This section reviews each.

Application How-to's

- available in 7.1 and 7.0
- steps users through the completion of tasks within Manage 2000 (e.g., how to process a sales order with progress billing)
- contains links to Manage 2000 functions and other documentation
- stands alone on documentation menus
- 400+ available

How-to Courses

- available in 7.1 and 7.0
- provides detailed education on features and functionalities of application topics
- includes a table of contents, prerequisites, setup, objectives, overview, process explanations, and workshops
- contains links to Manage 2000 functions and other documentation (e.g., application how-to's)
- several content options based on user needs:
 - Instructor-Led - teach the course
 - Self-Led - post-training refresher or departmental training
 - Instructor-Preparation - prepare for the course
- 26 available

Function Documentation

- available in 7.1 in XML
- consistent content categories
 - purpose
 - description
 - limitations
 - features and capabilities
 - integration detail
 - setup
 - conditions and results
- purpose available to re-use (include) within other documentation (TO's, how-to's)
- 2500+ available

Field Help

- available in 7.1 and 7.0
- converted to XML
- consistent content categories
 - description
 - key field information
 - mathematical formula
 - conditions and results
 - setup parameters
 - technical information
 - cross-reference information
- stylesheets control the format; developers control the content
- dictionary descriptions and standard database descriptions in XML format
- non-dictionary oriented-help in XML format; still resident in application help files
- easier to read and understand
- links to other information
- maintained on the host, not on the client

Glossary

The glossary documentation type is made up of two categories - glossary terms and glossary term lists.

Glossary Terms

- available in 7.0 and 7.1
- available as pop-up's within content
- used within how-to's, topic overviews, etc.
- may contain links to related documentation
- terms available to re-use (include) within other documentation (TOs, how-to's)
- 350+ available (many added with each new document/course created)

Glossary Term Lists

- available in 7.1 and 7.0
- available as documents to use in training and presentations
- lists categorized by:
 - Analyze 2000
 - EDI
 - finance
 - information technology
 - manufacturing
 - navigation
 - sales
 - cumulative list of all Manage 2000 glossary terms
- 9+ available (terms added to lists with each new document/course created)

Technical Documentation

The technical documentation type is made up of three categories - subroutines (UD.XXX), basic functions (UD.XXX), and .NET object classes (OC.XXX).

Refer to the **ProgrammerDoc** menu to view documentation for programmers.

Subroutines

- available in 7.0/7.1 in XML
- consistent content categories
 - purpose
 - description
 - features and capabilities

Basic Functions

- available in 7.0/7.1 in XML
- consistent content categories
 - purpose
 - description
 - features and capabilities

.NET Object Classes

- available in 7.1 in XML
- consistent content categories
 - purpose
 - description
 - methods
 - properties
 - events

UniData Help Documentation

- available in 7.0/7.1
- converted 5.2 and 6.0 help to XML
 - UniBasic
 - UniData
 - UniQuery
 - SQL
- consistent content categories for OS Help
 - HELP OCONV
 - selecting items in EDP, and pressing F1

Documentation Differences Between Release 7.1 and 7.0

The table below summarizes the documentation differences between release 7.1 and 7.0. In release 6.5, all of the documentation except field help was written in ROX.

	7.1	7.0
Solution Overviews	XML	not available
Application Overviews	XML	PDF
Topic Overviews	XML	XML (sp6)
How-to's	XML	XML
Function Documentation	XML	PDF
Field Help	XML	XML
Glossary	XML	XML
Technical Documentation	XML	XML
UniData Help Documentation	XML	XML

Release 7.0 Features

This section reviews feature highlights from release 7.0. For a detailed document of all enhancements in release 7.0, please contact your Manage 2000 representative.

Product Data Management

New - Web Configure to Order (eCTO)

- puts the power of the product configurator in the customer's hands
- allows customers to order products over the Web configured to their exact and unique requirements
- extends the eSales Order Processing (eSOP) application by allowing customers to configure products on-the-fly and/or select from product catalogs
- allows for easy selection of features and options, verifies the selections against the rules, and may present additional options based on its calculations against engineering specifications
- rolls up costs and pricing and generates a bill and routings

Configure to Order Capabilities

Global CCVs

- improves data entry efficiency and accuracy by allowing run time configuration control variables (CCVs) to be applied across an entire sales order

Run Time (RT) CCVs are the only type of CCVs that can be global. Once defined as global, they maintain that feature wherever they are used. The Global CCVs are attached to a front end screen and are triggered through the **SO.ENTRY** or **SQ.ENTRY** functions. When the model is entered on the first line of the sales order, the front screens attached to the model are presented. The user enters information in the screens and saves the information in order to configure the first item.

Easy New Model Creation

- allows the copy functions for bills of materials and items to be used to copy CTO models via a system-wide switch

The copy functions are **COPY.BILL** and **DUP.ITEM** with the system-wide switch (default is off) in the **CTO.CONSTANTS** function.

Multi-pass Duplicate Checking

- performs a check at the end of each reconfiguration to search for a duplicate configuration or assign a new number

The enhanced duplicate checking prevents changes to existing configured items from affecting other orders for the same item. CTO performs a duplicate check when an existing configured item number is changed. If a new duplicate is found, that part number is selected or if no duplicate is found, CTO will create a new part number. A new setting in **CTO.CONSTANTS** controls this new functionality. The default is set to off.

Automatic Detection and Reroll of Changed Prices and Weights

- flags CTO structure to reroll prices or weights on the next reconfiguration if the system identifies that an item used in a CTO structure has incurred a price or weight change when updating a bill to reflect price and/or weight changes

A new setting in **CTO.CONSTANTS** controls whether changes to an item's catalog prices and weight will do an upward bill chase to see if the changed item is used in a CTO structure, and, if so, will set the CTO model to reconfigure affected parts to re-roll the prices and/or weight the

next time the affected parts are accessed in CTO. The default setting is off.

Powerful Presentation and Data Validation

- displays the options part number, CTO description and price when configuring an item at sales order or quote entry via a pop-up box
- allows order entry technicians to more effectively discuss options with customers and to enter the correct configuration with greater accuracy

This feature is a more powerful user presentation and data validation for custom tailored CTO data entry screens. A new API was created to access internal CTO information while entering data in these custom tailored front end screens.

- A new subroutine called SUB.EVAL.CCV loads CCV values as the user answers each prompt in a CTO front end screen by adding SUB.EVAL.CCV as a before-prompt subroutine and/or an after-prompt subroutine in the **SCREEN.BUILD** function. This subroutine has the ability to evaluate CCVs before and after prompts in the front end screen by putting a CCV name in the XDATA1 prompt of the **SCREEN.BUILD** function with the format of A:CCVNAME, B:CCVNAME2, which will evaluate CCVNAME on an after-prompt basis while the CCVNAME2 will be evaluated on a before-prompt basis.
- Added logic to allow easy order entry review of a list of part numbers, their CTO descriptions and prices. A literal string option of 'PNPRC' in the XDATA1 prompt in the **SCREEN.BUILD** function, on a prompt which has part numbers defined in the edits (C7 screen) will cause SUB.EVAL.CCV to load up the mouse with these fields.

Alternate Routings

- enables increased manufacturing flexibility and factory utilization for quicker customer response
- allows an alternate routing to be selected from available alternatives and assigned to a manufactured part when work orders or repetitive plans are released or after release

Routing maintenance in the **CTO.MANAGEMENT** function now supports entry and validation of alternate routings.

Global Routing Operations

- enables specified fields of global routing operations to be maintained and modified in item routing maintenance

Strict control over settings for global routing operations is usually desired, but some customers needed certain fields to be available for user modification after the global operation data was imported into the item routing, and this function allows those fields to be specified.

The functions are **OPERATIONS** and **ROUTINGS**.

Manufacturing

This section reviews manufacturing features that are categorized by planning, execution, and control.

Manufacturing - Planning

New - Advanced Planning and Scheduling

- extends Manage 2000's existing suite of scheduling capabilities, which includes master production scheduling and KANBAN
- offers advanced capacity constraint-based factory planning and scheduling
- allocates time on the appropriate work centers, for each operation of each job, so that each job's due date is met and work centers are never booked for more work than they can handle at any time
- allows users to control which jobs get done on time if there are too many jobs for the available resources
- executes either as a finite or infinite schedule, finite schedules reflecting what is actually happening on the shop floor, while infinite schedules are used for practical analysis
- enables a user to create feasible and detailed plans and schedules, and provides the flexibility to accommodate changing conditions. It gives users the visibility to foresee obstacles in ample time to avoid them

The power of the APS application is its ability to schedule thousands of jobs and operations over hundreds of work centers in a matter of minutes. It can be applied to any activity in the workplace where scheduling could improve organization and control. This scheduling system is designed to handle the variability and realities of the shop floor and the interruptions that can occur, such as over runs or under runs, material delays, approval waits and changing priorities.

Manufacturing - Execute

New - Purchase Consignments

- enables suppliers to provide inventory to their customers either at no cost or on extended terms until the inventory is actually used
- allows the arrangement to expire within a given timeframe, upon which the inventory, if not yet used, would be purchased or returned
- can be global for any item or vendor, or can be item and vendor specific (so not all of the supplier's products need to be included or so the arrangement can be temporary to accommodate new product promotions, seasonal items, etc.)
- allows the terms of the arrangement to be controlled at the purchase order line item level

Inventory received on consignment is physically segregated from in-house stores to maintain control. Once consignment inventory moves from the designated consignment area onto the manufacturing floor or general inventory pool, it is considered to be used and payment would be due, according to the arrangement terms. System, vendor, and item level settings determine whether and how the value of the inventory during consignment is to be assessed.

Vendor Requirements Allocations

- automatically divides planned purchase requisitions among multiple vendors for user-specified periods of time according to user-defined percentages
- is useful when your material requirements may be too large for one vendor, or to take advantage of quantity-based short-term special prices offered by a secondary vendor, or if you want to order from a new vendor on a trial basis
- is also useful if your primary vendor has an interruption of service for a period of time and you would simply identify percentages to be allocated to one or more alternate vendors for that date range

Refer to the **Process Vendor Requirements Allocations** how-to.

Purchasing - Miscellaneous

Purchase Agreements

- tracks purchase agreements by effective date using fields that accommodate agreement number, effective date and termination date

Blanket Purchase Order Release

- converts, in batches, MRP generated planned purchase orders and requisition action ticklers to new scheduled deliveries on existing open blanket PO's
- allows a look-ahead horizon and various runtime options to be selected

Short Requisition Form

- streamlines purchase requisition entries

Return to Vendor

- available with purchase consignments and container work orders

- new system level switch in **PO.CONSTANTS** allows material returns to a vendor without reopening the original purchase order while still recording costs and inventory transactions (SP6)

This also applies to drop ship purchase orders from sales orders.

Work Order Splitting/Alternative Product Manufacturing

- allows a quantity to be split off from an existing production work order to a new production work order
- solves the situation in some companies where the product changes during manufacturing and ends up being a slightly different product

An example might be sheet metal that must be stamped to precise specifications within a certain range. If, during the manufacturing process the range is exceeded, the item produced is actually a different part. These and other occurrences may warrant work order splitting, where production is split off as of a specified sequence on a work order and finished on a different work order.

The new production order may be for the same or a different parent part number and quantity, and the original order is reduced by the quantity transferred. The original picklist and routing are the basis for the new order. Accumulated materials and tracking numbers plus labor, burden, and outplant as of the selected sequence are automatically moved to the new production order. This capability automates entries to track these unplanned items, improving inventory control and eliminating non-value producing steps.

Work orders are split in the **WO.SPLIT** function.

Manufacturing - Control

Serial Number Containerized Inventory Control

- enables creating and maintaining containers of a serial tracked item
- tracks moving, shipping and receiving these containers
- generates historical information

Tracking inventory by the container may be more feasible and cost-effective than tracking serial numbers individually.

Refer to the **CONTAINER.ENTRY** function.

Inventory - Miscellaneous

New Function - **LOOK.IM.ACCESS**

- allows the user to view information about customer, supplier or manufacturer's part numbers

Inventory Adjustments Value Report

- reports the total value of adjustments, positive and negative
- gauges the effectiveness of inventory control procedures because it provides improved visibility into the magnitude of inventory adjustments

The function name of this report is **INV.ADJ.VALUE**.

Single Lot Control

- allows specifying that all of a lot traced component used on a work order come from a single lot, and that a component lot can be dedicated to one or more parent work orders
- shows shortages of lot traced parts that are committed to work orders

Planned Interfacility Transfers

- gathers planned interfacility transfers into a list for printing or viewing
- allows for all of the transfers listed to be released en masse in a single step

Use the **MTO.SHIPMENTS** function to record interfacility shipments on material transfer orders.

Lot Traced Layered Inventory Control with Repetitive Backflushing

- allows lots to be backflushed on a FIFO, LIFO or user-selected layer basis in repetitive, multiple location environments
- moves components or materials into and out of the designated layered inventory control locations with the standard or automated data input (ADI) move functions

Many times, manufacturers want to use materials or components from the oldest lot they have on hand at any given time, and effect a FIFO system of inventory usage by lot. Also, there are occurrences when a customer wants to place an additional order for product from a specific lot, which may be in the middle of a hopper which feeds from the bottom. And, there are instances when the quality of a certain lot is poor and the lot must be pulled, even though additional lots have been produced and stacked on top of it. Formerly, managing these conditions could necessitate a number

of fairly complicated and time-consuming manual steps. Manage 2000 has the capability to automate these processes.

Refer to the **Set Up and Use Layered Inventory Control for Repetitive Manufacturing Component Inventory Backflushing** how-to.

Sales and Marketing

New - Web Sales Order Processing (eSOP)

- allows users to:
 - enter orders using an easy-to-use Web order entry form
 - quickly find the exact item by selecting from category lists or simply entering the part number
 - display product information, including pricing
 - take advantage of discounting specific to them
 - securely inquire on the status of order(s)
 - receive order confirmation by email

Manage 2000's eSOP is a real-time order entry mechanism. It does not simply access a batch database, nor are submitted orders held for batch processing or manual re-entry later. Web-placed orders can be entered as quotes for review prior to order conversion or can be booked directly into the system. As the order develops, the Web user can view its contents and total cost. They can change the item quantity, delivery dates and ship-to address, and can recalculate the order. Upon submission, they receive an automatically generated order confirmation. Security rules are built in so only authorized persons can enter orders and access product descriptions and pricing. Customers can be assured that the orders they enter are fully protected from the scrutiny of others, because only they have access to their account information. Discounts allowed to specific customers are factored into the price calculation so they get an accurate order cost or quote.

Refer to the **eSOP Application Overview**.

Web When Available (eWHEN.AVAIL)

- calculates a product's earliest available ship date for items that are ordered over the Web

This allows an authorized person to get the earliest date that the desired product can be delivered when a product number or partial name and a desired date are entered at the Web-presented input fields.

The projected availability date is based on the critical path lead-time calculation through multiple levels of planned and released orders.

Bill of Lading Function (BL.ENTRY)

- prints National Motor Freight Classification (NMFC) information, DOT Hazmat (hazardous materials) detail, and supports most Voluntary Interindustry Commerce Standards (VICS – standards to simplify the flow of products and information across the supply chain)

SO.ENTRY Features

- allows changes to ordered items at the line item level unless certain activities have been recorded
- permits replacement components for a top-level item to be easily selectable at order or quote entry with an option at the item number prompt that invokes a multi-level bill of material
- allows sales order and quote line items to have a warranty type code

Sales Order Processing - Miscellaneous

Return Material Authorization (RMA)

- allows for the sales order number, original invoice number and customer purchase order number to be entered at the RMA line item level
- permits bar codes to be printed on RMAs

Planning Activity

- item activity can be displayed from the sales order and quotes inquiry functions

Price Access Security

- secures access to pricing information in the inquiry/look functions for sales orders and quotes using tab-level security

Quotes

- allows a new part number can be created for Configure To Order (CTO) parts during quote configurations
- allows sales orders and acknowledgements to be printed when quotes are converted to orders

Sales orders may be auto-printed onto standard or customer-specific forms.

Customers

- permits all items for a customer to ship from one lot

Contacts

- allows web preferences to be specified for a contact

Vendor Managed Inventory (VMI)

- provides users with the ability to monitor on-hand inventory through regularly scheduled reviews, so the product can be produced and shipped to the user just when it is needed
- generates a replenishment order, shipping documents and invoice when the user's inventory reaches a predefined level, specified via item level controls
- allows users to provide their inventory data through EDI (see 852 EDI transaction), Web published reports, fax or other means
- provides at-a-glance business intelligence data of sales activity for all or selected customers and all or selected items via the new inquiry function **SHOW.SALES.ACT.DATA**

Customer Relationship Management

Centralized Contact Master for Web Support

- enables fast and accurate Web verification as well as email list generation for electronic mass mailings
- enables identification of relationships between vendors, customers, system users and employees, which can facilitate better communication across the supply chain
- allows automatic updates to contact records as names, phone numbers, addresses, etc. are added or updated in other areas of the system
- provides enhanced contact master security where update permissions can be assigned to specific fields (e.g., database relationship fields)

New - Web Call Center (eCC)

- enables Web service case entry and reporting
- enables you to offer your customers service request entry and status reporting seven days a week all year long

Using the provided simple case entry form, or customizing it for your own organization, you can quickly begin receiving service requests over the Web.

New - Field Service Orders

- enables tracking and recording of events and inventory involved in performing maintenance or repair services by technicians at customer sites (services could range from warranty repairs to scheduled service calls)
- contains loading, scheduling, and dispatching functionality to manage where service technicians are, what they are currently doing, and when they will be available
- alerts technicians that required service parts are not currently on-hand in their service vehicle or location, so they can stock the appropriate inventory prior to departing for the service site
- allows a field service order to be created stand-alone or by using the call center's case entry function

During order creation, the customer's credit is checked, as well as service contracts or warranties. Standard work order costing applies to material, labor, burden, and outplant. Catalog or manual pricing, as well as trade discounts (for the entire order or at a line item level) are available pricing schemes.

An extra charge multiplier can be applied to a fixed rate extra charge. For example, if the standard extra charge rate for mileage is \$.40 per mile, but extenuating circumstances warrant 1.5 times that amount, the multiplier could be applied and the extra charge on a 100 mile trip would be calculated at \$60.00.

Quick RMA from Service Call Entry

- enables technicians to issue an authorization to return an item without leaving the service order entry function

RMA processing is available from the drop-down options menu of the service case function.

Enhancements to Project Creation and Maintenance Function (PROJ)

- allows quick entry of new events, follow-ups and source, as well as access to comments via clickable button on several screens
- includes pop-up message box that confirms creation or deletion of a project, which includes the project type and number
- allows a single function for creating, viewing and maintaining comments

General Accounting

Payables Function New Look and Features

- ability to add miscellaneous charges, discounts, and remit-to or payment information with a click of a button on the payables main screen
- includes purchasing multiples:
 - multiple receipts per vendor - using the payables function, after entry of a vendor name/number and invoice (selectable), a list box is presented from which users may select certain or all non-invoiced purchase order receipts for the specified vendor. The list box also shows all invoice activity that has taken place for each of the listed receipts to aid in the selection.
 - multiple PO's per vendor invoice - multiple purchase orders can be combined on the same vendor invoice number.
 - multiple invoices per vendor receipt - multiple invoices may be entered on a single receipt.

The name of the function is **PO.PAYABLE**.

Four-Level Dynamic Financial Statement Drill-down

- allows quick visibility to source transactions and documents such as invoices, purchase orders, or chart of accounts
- provides management information without the need to access other applications
- helps troubleshoot accounting variances prior to publishing financial statements so when a problem is detected, accountants can quickly drill down to underlying detail to determine if the cause is an operational issue or an accounting error

Viewer windows stay on your desktop until you close them, so as you drill down in one area, you can keep checkpointing at higher levels for the complete picture.

The four-level drill down is available in **PRINT.STATEMENTS**. Information that is found at each level:

- first level - users can see all the general ledger accounts, their descriptions, period activity, year-to-date activity and closing balances that make up a specific line on a financial statement.
- second level - from the first level, users can choose an account and drill down to the second level. Here, users can see the debits and credits from each source code for each general ledger account posted during the current period.
- third level - from the second level, users can choose a source code from a specific posting and drill down to a third level to the individual general ledger transactions that make up that source code's posting amount.
- fourth level - finally, users can choose a general ledger transaction from the third level and drill down one more level. At this fourth level, users may see the general ledger accounts along with their corresponding debits and credits that comprise that specific general ledger transaction.

Batch Release of Journals

- releases journals en masse based on a code that a user may apply to journals to designate them for batch release
- generates a report of the released journals

- updates appropriate files upon execution of the release function
- allows the report of journals containing the batch release designation to be generated without actually releasing the journals

Refer to the Enter and Release Batch Journal Entries how-to.

Optimized Credit Management and Approvals

- simplifies credit management by combining order approval and multiple credit activities all in one function
- generates a list, which can be searched by customer, credit status, or open orders with drill-down capabilities
- approves one, selected, or all orders
- allows for the creation and maintenance of hold reasons and credit statuses

The name of this function is **CREDIT**.

Accounting - Miscellaneous

- A customer's deposit can be recorded in the cash application function.
- Both gross sales and pricing discounts may be posted to the general ledger. This affects shipping, invoicing and credit memo processing.
- Payment history on invoices, as well as high AR balances are tracked.

Interface

New - Shipment Data Interface

- offers a standard interface to shipping systems, such as UPS, Federal Express, Airborne Express and others
- provides manifest systems with information from Manage 2000 about expected shipments, and allows the update of Manage 2000 with relevant information about processed shipments

Management of shipping processes and costs is quickly rising in importance to manufacturers as getting products to customers in the shortest time at the least cost takes on critical competitive significance.

The information provided to manifest systems is usually comprised of name, addresses, and COD charges. Updates to Manage 2000 primarily include bill of lading information and extra charges. The bill of lading information from freight carriers consists of Package ID, Tracking Number, Weight, and other information. Extra charges can be assessed in a number of ways through a new shipments parameter controlling function. Carrier fees may be modified for increasing charges and discounts based on the sales order parameters. This interface can be used concurrently with multiple shipping systems.

New - Demand Solutions Interface

- allows users to gather demand data from multiple sources
- allows demand and inventory needs from suppliers through manufacturing through store-level sales and replenishment needs can be converted into production plans
- includes data exports from Manage 2000 into the DS system and imports from DS into Manage 2000
- helps users proactively manage demand variables across the supply chain

Once the system generates forecasts, a variety of tools are available to make adjustments, create aggregate forecasts, add notes, and to create production and/or purchase plans. The plans and assumptions can be expressed in units, costs, selling price, profit, foreign currency and equivalent units. Many analytical reports are provided to pinpoint exceptions and evaluate performances of forecasts to actual.

Refer to DSI how-to's available online.

Electronic Data Interface

Refer to EDI how-to's available online.



EDI transactions require specialized consulting for successful implementation.

810 Transaction - Incoming Accounts Payable (AP) Invoice

- enables receipt of accounts payable invoices via EDI

852 Transaction

- supports Vendor Managed Inventory (VMI) which improves the production flow because of the visibility into customers' inventory requirements, and the ability to replenish the needed items when stocking levels fall below a defined minimum quantity
- receives information from customers regarding the level of inventory they have on-hand for one or more of the manufacturer's products
- enables valuable rate of change tracking
- highlights the rate of product sales in a store, territory, or region when linked to business intelligence capabilities, enabling expanded product vision and planning

850 and 840 Transactions - SDQ

- is a cost savings for manufacturers dealing with large or distribution-based trading partners
- separates transactions over 999 lines into multiple orders or quotes by store or ship-to location
- transmits very large orders all at once (transactions under 999 lines result in a single order or quote with ship-to codes at the line item), which incurs fewer transaction charges than when sent as separate orders

945 Transactions

- honors backorder cancellations

Tools

This section reviews new Tools features and functionality and is categorized by the type of user - system user or technical user.

Tools - System Users

The Tools features contained in this section are features that will interest all system users.

Enterprise Knowledge Portals

- aggregate information and supply links to related functions and capabilities across your Manage 2000 system
- accesses Manage 2000 information easier
- opens Web-based gateways to real-time information, promoting efficiency of operations and decision-making throughout the company
- changes the way you accomplish your day-to-day tasks because they provide pre-assembled links to virtually all the information in the system that you could need on a given topic from various data sources
- accessible from Manage 2000 menus and Manage 2000 software objects (MSOs)

Release 7.0 provides the following portals:

- Call center
- Customers
- Engineering
- Master Scheduler
- Planner/Scheduler
- Service Contract
- Stock status
- System Administration
- Vendors/Supplier
- Work order status

You can, for example, upon authorization, use the customers portal to access real-time information on a customer, including orders, service calls, accounts receivable information, RMAs, contracts, etc., while receiving up-to-date news and items of interest about that customer. The stock status portal aggregates links to information from all over the system about an item's status, including status by lot, location and facility, plus recent events such as shipments, location transfers, etc. With these information access portals, you can keep better informed and improve responsiveness.

Enterprise Workflow Technology - Event/Condition/Action (ECAs)

Web-enabled Workflow Messaging

- allows emails triggered by the Event/Condition/Action (ECA) system to contain hyperlinks to Web pages (Web-published reports, catalog pages, or other URLs containing additional data or information that the recipient may need)

The action triggered by an ECA can be an email that informs the recipient of an event and/or it may request action on the part of the recipient in response to an event. Those emails can be in XML or HTML format.

Workflow - Conditional Routings

- enables users to further automate business flows throughout the enterprise
- automatically circulates user-defined parameters and routings, such as approvals for purchase requisitions or engineering changes

- allows questions to be scripted into the ECA which, depending on the recipient's response, may trigger various actions or chains of actions

The router parameters and scripts support questions, valid answers, supporting information, additional user-entered remarks, etc.

Additional ECA Features

- ECA packets are available to control the bundling and/or timing of ECA notifications in conjunction with the new event schedule parameters. Periodic scanning can be invoked to monitor the event schedule and execute actions accordingly.
- The new Web feature of the EOT Viewer (versus the grid) may be used to review and maintain ECA notifications. HTML and XML/XSL are supported for applicable target notifications.
- Enhanced and additional scripting commands are available.
- Pull-down option lists enable easy selection/insertion of conditions and actions.

Enterprise Object Technology (EOT) Viewer II

- is a Microsoft COM object
- allows the most flexibility in manipulating data with the ease of Microsoft Windows conventions
- Outlook® Bar Navigation (all views)
 - A Microsoft® style Outlook Bar is available with programmer-definable folders and items.
 - Option to display function name or function description when viewing the EOT Viewer Shortcuts. (SP6)
 - Folders and items are controlled from the host, including captions and icon choices.
 - The host also defines special notification processing for each folder item, including URL assignment and multi-column grid sorting.
 - Graphic images for folder items are stored in separate compressed icon files. Currently, Epicor has 750 icons defined.
- TreeView Navigation (all views)
 - Allows programmer-definable tree nodes.
 - Its properties are the same as Outlook Bar properties.
 - Option to display function name or function description when viewing the EOT Viewer Shortcuts. (SP6)
 - Tree nodes, captions and icon choices, are controlled from the host.

Tools - Technical Users

The Tools features contained in this section are features that will most interest technical users such as system administrators.

Technology Infrastructure - User Interface

Enterprise Web Client

- provides an efficient, single integrated solution for Manage 2000 users to connect to the Web and other COM compliant applications

This power architecture connects a Web client through a Web server and middleware to the Manage 2000 server. Industry standard software and technology transmit Web requests while applying existing business rules. Microsoft® (MS) technology is used for the client, Web server and middle layers and includes MS Component Object Model (COM), MS Internet Information Server (IIS), Windows 2000® and MS component services. To help users get started using the Web features in Manage 2000, “stock” Web pages are provided for use almost as is (modify for company name, graphics, etc.) or as a starting point for creation of more customized pages.

Enterprise Power Client

Many functions are converted to EOT/power user COM-compliant applications. This redesigned presentation delivers greater power and is more intuitive for most users. Some of these power-user functions combine the features of several functions to provide one-stop processing of related tasks.

The same middleware used by the Enterprise Web Client connects local LAN or WAN users to the Manage 2000 server. This turns the user's PC into an Enterprise Power Client containing several different technologies, listed below, each having certain advantages and disadvantages. Manage 2000 applies the technology that best displays and executes the application being requested by the user:

- Power Web architecture
- Delphi EOT applications
- EOT Viewer II, including client report processing and embedded XML/Web extensions
- Integrated PWS technology

XML Permeates Manage 2000 Infrastructure

- provides easier and more intuitive navigation and quick access to capabilities and documentation
- provides the basis for connectivity to other XML-based applications and is the nucleus for eBusiness applications since XML is a standards-based technology for defining the interchange of data

XML Manage 2000 Menus

- allows navigation with the familiar menu bar icons such as forward, back, stop, refresh, and print
- enables quicker access to functions, documentation, and the dynamic help system via expandable lists
- enables more efficient searching

- provides the basis for creation of the user's own personal portal in the future

A click on a search-generated list automatically launches the function desired, and a click on the back arrow goes right back to the search input form to conduct a new search.

Web Retrieval of Report-Built Reports

- retrieves, over the Internet by authorized persons, stored reports that users have created using Manage 2000's report builder function
- allows reports to be linked to enterprise knowledge portals or accessed from the main portal table of contents

I-Descriptors On-the-Fly in **REPORT.BUILD (SP6)**

- allows the user to create I-Descriptor fields on-the-fly for use in printing, sorting or selecting data

These I-Descriptors are stored with the report so they won't clutter dictionary files.

Optionally, the user can utilize the wizard that automatically creates a translate using files and dictionaries that have a relationship with the base file name, or, the user may define the I-Descriptor expression without the aid of the translate wizard.

Tools - IT Tools

HyperQuery, a Web Development Tool

- creates Web-ready queries and applications

For example, using HyperQuery, HTML reports can be created complete with hyperlinks from columns to additional details or reports. The HyperQuery developed reports are delivered to the user's browser, which allows familiar browser navigation. Just as with report-built reports, hyperqueries can be easily added as links on enterprise knowledge portals.

Cross-referencing in Web Applications

- captures information, via Web cookies, into a list for use by Web developers to incorporate cross-referencing into their Web-based applications

Repository for XSL Stylesheets

- provides a library for XSL stylesheets that can be maintained by transferring them to a desktop, changing them with any stylesheet editor, and repositing them back into the Manage 2000 library

Customized Messaging

- enables users to extend, modify or replace most of the text in most of the 25,000 standard messages embedded in Manage 2000's applications

Previously, such modifications could be done only via programming changes. Message modification may be desired to add or reconstruct text to accommodate local conditions.

Editor Enhancements (**SP6**)

- replaced the EDP editor with a new editor, epiEdit, that is UniData aware

It allows editing multiple items at once, can also edit PC files, and does full syntax highlighting (compiles in place and many other options).

DICTS.AUDIT Function (SP6)

- scans dictionaries and reports for errors that could produce run-time errors

New Utility - **GENEOT** (SP6)

- displays EOT data from a transaction that can be used to debug EOT errors

One of the real powers of this function's display is the inclusion of a Custom column that indicates what is custom for a custom dictionary, using the standard dictionary as the base. For example, the code 3 indicates conversion value.

Documentation

XML Enhanced Learning

- takes advantage of the power of Enterprise Object Technology (EOT) Viewer II by using the TreeView and Outlook navigation modes to easily retrieve topic information, and the XML-based infrastructure allows hyperlinks to how-to's, whitepapers, and field help documentation
- significantly shortens training cycles and improves productivity because of quick access to step-by-step instructions, examples, and problem-solving aids

Two XML-based help are field help and how-to's

- How-to's provide readers with procedural steps that tell them how to do a task, and are targeted to specific knowledge levels. A boon to new and experienced users alike, the library of how-to's can quickly step users through a "How do I...?" process.
- Field help is comprised of dictionary descriptions, non-dictionary oriented help, and standard database descriptions within Manage 2000 software, all of which are in XML format. Field help is displayed using the EOT Web viewer. Stylesheets control the format of the display.

Complete Education Courses Integrated with Manage 2000

- allows access to Web-based training courses directly from Manage 2000, a significant component of Epicor's knowledge management system
- makes learning pertinent and accessible whenever it is needed
- saves users travel costs, shortens time to productivity and provides knowledge-on-the-fly, whether used as a first-time training course or refreshing knowledge of specific capabilities at the time of need

A click on a tab delivers extensive course materials, notes and workshops designed for instructor-led training. Another tab invokes a complete learning path for the self-learner.

Release 6.5 Features

This section reviews feature highlights from release 6.5. For a detailed document of all enhancements in release 6.5, please contact your Manage 2000 representative.

Product Data Management

Negative Quantities per Assembly

- allows negative quantities per assembly (QPA) when maintaining bills of material and processing ECO's for manufacturing applications

Negative QPA's are not supported for components of phantoms in sales order processing, but are supported in configure to order.

Configure to Order Capabilities

ETO CTO

- allows Configure-to-Order (CTO) model to be designated as an Engineer-to-Order (ETO) model where the CTO creates the initial part, bill, routing, cost rollup, price rollup, and extended description generation, but as an ETO model, preserves them as the item is engineered
- allows subassemblies not currently existing as actual parts to be included in a configured item for later creation

The Change mode processing is the major difference. Currently, when changing an existing CTO configured-item, the item's entire bill and routing are deleted and re-added. In addition to rebuilding the bill and routing, the costs and prices are also re-rolled. The change is to have CTO leave the bill, routing, costs, and pricing information alone. However, the extended description is rebuilt.

Multi-pass Duplicate Checking

- performs a check at the end of each reconfiguration to search for a duplicate configuration or assign a new number

The enhanced duplicate checking prevents changes to existing configured items from affecting other orders for the same item. CTO performs a duplicate check when an existing configured item number is changed. If a new duplicate is found, that part number is selected or if no duplicate is found, CTO will create a new part number. A new setting in the **CTO.CONSTANTS** function controls this new functionality. The default is set to off.

Automatic Detection and Reroll of Changed Prices and Weights

- flags CTO structure to reroll prices or weights on the next reconfiguration if the system identifies that an item used in a CTO structure has incurred a price or weight change when updating a bill to reflect price and/or weight changes

A new setting in the **CTO.CONSTANTS** function controls whether changes to an item's catalog prices and weight will do an upward bill chase to see if the changed item is used in a CTO structure, and, if so, will set the CTO model to reconfigure affected parts to re-roll the prices and/or weight the next time the affected parts are accessed in CTO. The default setting is off.

Powerful Presentation and Data Validation

- displays the options part number, CTO description and price when configuring an item at sales order or quote entry via a pop-up box
- allows order entry technicians to more effectively discuss options with customers and to enter the correct configuration with greater accuracy

This feature is a more powerful user presentation and data validation for custom tailored CTO

data entry screens. A new API was created to access internal CTO information while entering data in these custom tailored front end screens.

- A new subroutine called SUB.EVAL.CCV loads CCV values as the user answers each prompt in a CTO front end screen by adding SUB.EVAL.CCV as a before-prompt subroutine and/or an after-prompt subroutine in the **SCREEN.BUILD** function. This subroutine has the ability to evaluate CCVs before and after prompts in the front end screen by putting a CCV name in the XDATA1 prompt of the **SCREEN.BUILD** function with the format of A:CCVNAME, B:CCVNAME2, which will evaluate CCVNAME on an after-prompt basis while the CCVNAME2 will be evaluated on a before-prompt basis.
- Added logic to allow easy order entry review of a list of part numbers, their CTO descriptions and prices. A literal string option of 'PNPRC' in the XDATA1 prompt in the **SCREEN.BUILD** function, on a prompt which has part numbers defined in the edits (C7 screen) will cause SUB.EVAL.CCV to load up the mouse with these fields.

Alternate Routings in CTO

- enables increased manufacturing flexibility and factory utilization for quicker customer response

Routing maintenance in the **CTO.MANAGEMENT** function now supports entry and validation of alternate routings.

Easy New Model Creation

- allows the copy functions for bills of materials and items to be used to copy CTO models via a system-wide switch

The copy functions are **COPY.BILL** and **DUP.ITEM** with the system-wide switch (default is off) in the **CTO.CONSTANTS** function.

Manufacturing

This section reviews manufacturing features that are categorized by planning, execution, and control.

Manufacturing - Planning

Rate-Based Scheduling

- simplifies planning by automating load leveling
- schedules the same quantity of units or hours at regular intervals

Simply stated, it is manufacturing to a budget. Resource capacities for master production scheduling (MPS) planning groups are budgeted; simple priority rescheduling rules are applied; and production rates are leveled, forward or backward, to accomplish the plan.

Available to Promise

- provides manufacturers an additional method of customer order promising
- calculates what is built into the master schedule for a period less what is booked in that period
- provides immediate feedback if sales orders exceeds the ATP

This method complies with the APICS definition of ATP, which is the uncommitted portion of a company's inventory and planned production maintained in the master schedule (the unconsumed portion of the master schedule). Overbooking controls are available at the system and/or item level. Visibility of projected ATP is available at numerous points.

Refer to the **Available-to-Promise** topic overview for detailed information about this feature.

Use-up Effectivity Processing

- eliminates the costly scrapping of obsolete items
- defines a beginning date to start using up the old part and an ending date, which is really the non-effective date of the old part, and the effective date of the new part

When a new item is scheduled to replace an existing item on a certain date, Material Requirements Planning (MRP) can plan any on-hand balance of the existing item even beyond the replacement date. Once the on-hand balance reaches zero, MRP stops planning the obsolete part and offloads its requirements to the new part.

Defining a part for use-up is done via a mass replacement of the old part with the new part to use. In a Multiple Revision environment, the mass replacement is done in the **ECO.ENTRY** function as it only affects manufacturing revision levels. In a non-Multiple Revision environment, the mass replacement is done in either the **BM.MASS.REPLACE** function or the **ECO.ENTRY** function.

The general rules of use-up:

1. Overlapping use-up is not supported for either the old part or the new part. This means if part A is replaced by part B, part A cannot replace part C, nor can part B replace part C unless the second replacement is done using a new use-up time window which begins after the ending date of the previous use-up time window. Once the second use-up replacement is done, the previous use-up time window information is lost.
2. Use-up replacement of a component must be done on all parents which use that component; otherwise, MRP would stop planning for some parents while still planning other parents.
3. The low level code of the old part is set to be lower than the new part to insure MRP plans the old part first.

MRP use-up effectivity processing only processes dependent demand. Independent demand is excluded from use-up processing; however, a warning is given if a request is made for a part under use-up during the **SO.ENTRY/SQ.ENTRY** functions. Plans firmed for bill, summarized requirements (S*D), and work orders are omitted from use-up processing.

Dynamic Load Inquiry Drill-down

- ability to use the monitor interface to view continually changing load conditions
- allows drill-down to the detail

Refer to the Shop Load Graphing topic overview for detailed information about this feature.

Manufacturing - Execute

New - Truck Scheduling

- provides an entire set of flexible tools to support the dispatching and, if desired, the production of customer orders, independent of or fully integrated with sales order entry
- assigns customer orders to truck loads at order entry or can be pooled with other unassigned orders for later load consolidation
- reschedules sales order ship dates automatically if the truck assigned to the order is rescheduled

Repetitive Scheduling Management by Work Center

- modifies, closes short, deletes, or resequences repetitive production plans scheduled for a specific work center within a given horizon
- accesses queries such as component availability, activity, inventory and usage history, and catalog pricing

This new function is called **PROD.SCHED.MANAGEMENT**.

Production Receipts via Shipments

- enables production receipts to be recorded during shipments for certain items or globally

If specified by item or with a constant setting, the **SHIPMENTS** function will record (or reverse) production receipts.

Return to Vendor

- facilitates the return of materials to the vendor from which they were purchased
- generates the proper shipping documents
- simplifies completion of necessary accounting entries

If required, a negative receipt is created to back the items out of inventory. Optionally, an accounts payable (AP) debit memo can be added to the AP system to track the dollar amounts associated with these materials, as well as any miscellaneous charges that may apply to the return.

The three parts to an RTV transaction in the **RTV.ENTRY** function:

1. Header information - the fields on the header screen pertain to vendor information required to generate the proper shipping documents.
2. Detail line items - these fields describe or identify what parts, PO's, AP invoices, costs, units of measure, and quantities are associated with the material that is being returned to the vendor.
3. Miscellaneous charges - this screen handles charges that are the result from the transfer of these goods and materials back to the vendor. Each RTV transaction is associated with one vendor, so all detail lines associated with the RTV must be associated with that vendor.

PURCHASE New Look with Advanced Functionality

- provides quick maneuverability and access to its various screens as well as other functions and queries throughout the system

Specifically, the **PURCHASE** function has been modified...

- to display line items in detail screen.

This provides you with the ability to look at entered line items at the line entry screen without having to go back to the first screen. Line items can be requested at any time on the detail screen.

- to go from the blanket screen to the delivery screen in add mode.
- by adding a button to the delivery screen to show **PO.HISTORY** for the current item number.
- by incorporating standard Manage 2000 tools and operating procedures for ease of use.

Freight Allocations Capabilities

- effectively tracks and controls shipping costs
- helps anticipate costs for freight by item
- contrasts the accrued charges versus the actual payments for shipping

Freight carrier is now a validated field.

New freight taxable flag in the **SALES.TAXES** function and a new freight charge flag in the **EXTRA.CHARGES** function.

Manufacturing - Control

New - Plant Maintenance

- schedules maintenance of capital equipment
- enables plant engineers and maintenance managers to control corrective and preventive maintenance of machines, vehicles, plant equipment and more

Multiple work orders and service intervals can be maintained for the same equipment; routings and text can reflect the types of activity to be scheduled; cost and work history are archived, and much more.

Sales and Marketing

Configure to Order Component Sales Analysis Detail

- performs sales analysis on options and real parts chosen during the configuration process which includes pricing, costing and quantity information
- improves forecasting and product planning by enabling companies to gain insight into the items most often or least often selected

The **SO.ENTRY** function is modified to store information gathered by CTO entry defining which components of the configured item should have sales analysis records created and be printed separately on the sales order and invoice.

Distributed Database Sales Processing

- allows manufacturers to ship products from multiple subsidiaries operating with a separate system and database to fulfill a single sales order
- allows customers to place only one order instead of multiple orders with separate companies
- links all shipment orders back to the base sales order on the booking company's database, allowing the user to easily check the status of the entire customer order when the customer calls with a question

A new report **OPEN.SO.ALT.DBS** allows the user to report open sales orders across databases and includes additional information for distributed database sales orders. This report is similar to the existing **OPEN.SO** report.

Sales Drop Ship

- automatically creates or updates a purchase order when sales order line items are designated to be drop shipped directly from a third party vendor to a customer
- automatically performs allocations and shipments against the corresponding sales order line and creates an accounts payable invoice when receipts of these drop-shipped items are recorded

Items are flagged as drop ship items in the **ITEMS.SOP** function and this value is used as the default value for the line item level drop ship flag in the **SO.ENTRY** function.

Customer Relationship Management

Depot Service Order Pricing and Invoicing

- allows prices for each service performed to be entered
- display costs to easily determine the price to be charged
- allows each line to be flagged billable or non-billable, and taxable or non-taxable
- generates an invoice after the part is returned to its owner

Enhanced Project Summary Status

- allows personalized directories to be selected dynamically so that each service representative can use their own desired view via a new command (CD - Change Directory) at the main ID prompt in the PROJ function
- automatically saves the personal directory selected on the applicable CSM.REP file and used by the system until the rep selects another directory, thus allowing different directories to be used by different reps concurrently
- enables engineering change orders (ECO) to be tied to projects

Standard directories delivered with the system or any customized ones built using the **DISPLAY.CTL.BUILD** function are selectable.

Internal Help Desk Support

- allows the powerful features of the **CASE** function that enables easy maintenance and monitoring of customer service cases as they move from initial contact to resolution to be available for internal help desk support as well
- automatically logs tips and cases as events, which makes them available for use through the ECA triggering system
- allows easy tailoring of CASE screens to satisfy unique business requirements for each user may have different requirements or preferences and this flexibility allows his or her screen to be organized for maximum efficiency

In the **CASE** function, the internal users become the contacts. Department and job classes can be entered automatically from information maintained in the employee master file. Two additional commands are available specifically for internal help desk support that enable easy access to cases logged for specific users.

General Accounting

Four-Level Dynamic Financial Statement Drill-down

- allows quick visibility to source transactions and documents such as invoices, purchase orders, or chart of accounts
- provides management information without the need to access other applications
- helps troubleshoot accounting variances prior to publishing financial statements so when a problem is detected, accountants can quickly drill down to underlying detail to determine if the cause is an operational issue or an accounting error

Viewer windows stay on your desktop until you close them, so as you drill down in one area, you can keep checkpointing at higher levels for the complete picture.

The four-level drill down is available in the **PRINT.STATEMENTS** function. Information that is found at each level:

- first level - users can see all the general ledger accounts, their descriptions, period activity, year-to-date activity and closing balances that make up a specific line on a financial statement.
- second level - from the first level, users can choose an account and drill down to the second level. Here, users can see the debits and credits from each source code for each general ledger account posted during the current period.
- third level - from the second level, users can choose a source code from a specific posting and drill down to a third level to the individual general ledger transactions that make up that source code's posting amount.
- fourth level - finally, users can choose a general ledger transaction from the third level and drill down one more level. At this fourth level, users may see the general ledger accounts along with their corresponding debits and credits that comprise that specific general ledger transaction.

Cash from Lockbox Support

- provides for automatic processing of cash received into a bank lockbox using the Automatic Data Input (ADI) application

The database utilities are used to format a flat ASCII delimited file received from the bank into a BTI.TRANSACTIONS format. From there, the ADI process handles all formatting, edits, and updates using a new "CASH" transaction.

New Function - PAYABLE.RECEIPTS

- combines purchase order receipts and AP invoice entry

If enabled in the **AP.CONSTANTS** function, blanket PO's can be processed through the **PAYABLE.RECEIPTS** function. Vendor and item level flags control which vendors and items are normally processed in this way.

New - Payroll Interface

- provides the flexibility to interface with third-party PC payroll systems or outside payroll service bureaus
- provides an easy and efficient method of collecting labor information in Manage 2000 and making it available for payroll processing on the PC payroll or human resources system of choice

- allows the import of employee information to Manage 2000 from a third party payroll system via a PC and the export of payroll data to that third party package

Each third party payroll package or service accepts payroll data in a different format, using its own unique earnings codes and layouts. PAY includes some standard templates for ADP payroll applications. These templates can be user-customized for other payroll systems. Earnings codes are easily mapped, headers and footers may be added, and layouts and inlays can be defined for the import and export of the data in the required format.

Interface

New - Sales Force Automation

- allows the same up-to-date data and powerful sales processing and configure-to-order capabilities that are found on corporate desktops to be available to sales personnel remotely
- gives sales representatives on-the-spot pricing information for configurations to achieve a competitive edge when sales quotes and configured orders are entered "on the fly" during sales calls or upon securing a new contract away from the office
- empowers the sales force to provide superior customer service and quick response to market demands when combined with the power of the EIS/Cognos suite for sales analysis

Management can implement decisions regarding what information is available to reps via the **SUBSCRIPTIONS** function. For example, most companies will probably elect to allow sales reps to view only the information pertaining to their own territories. Also, the methods and constraints concerning how quotes are converted to orders are controlled on the host Manage 2000 server. In short, the sales quote/sales order logic of Manage 2000 is in place throughout the order cycle.

The steps/functions that are involved in sales force automation:

- **SUBSCRIPTIONS** - Each remote user is a subscriber to a database specifically designed for his/her use. Management determines the information to be available when the remote user dials in to receive updates. Subscription data may be selected using I-descriptors and saved lists.
- **PUBLISH.DATA** - After receiving data from the host, users run this function to integrate the received information on the remote computer.
- **GATHER.DATA** - Remote users enter order information using the **SQ.ENTRY** function. Then, the **GATHER.DATA** function assembles the data for transmission to the host. The user may selectively delete quotes from the list of quotes to be transferred during a session.
- **INTEGRATE.DATA** - Sales quote information arriving from remote users is processed with this function. Quotes are integrated into the host sales quote database, or held pending resolution of discrepancies or quote status.

New - Agile Anywhere™ Interface

- keeps multiple bills of material databases synchronized across an e-supply chain for sites not using the multiple revision bills of material capability
- helps manufacturers improve communications, competitiveness and time-to-market with better management of product content, costs and quality throughout the supply chain
- enables updated information and documentation on bills of materials to be published via the Internet to supply chain partners during critical product processes, and, likewise through the Manage 2000 link, this product change information is updated to the ERP system so it can be used by internal areas of the enterprise

Electronic Data Interface

Refer to EDI how-to's available online.



EDI transactions require specialized consulting for successful implementation.

New Partner

- allows users to rapidly establish trading relationships with TIE Commerce, Inc. (TIE), Manage 2000's new EDI partner
- provides standard maps or templates which accommodate most trading requirements but can be tailored for trading partners that have unique mapping requirements

820 Transaction

- transmits remittance or payment advice
- create accounts receivable cash receipts with the incoming data

Tools

This section reviews new Tools features and functionality and is categorized by the type of user - system user or technical user.

Tools - System Users

The Tools features contained in this section are features that will interest all system users.

Enterprise Workflow Technology

Event/Condition/Action (ECAs)

- improves the management and coordination of manufacturing processes and associated information and tasks
- begins when a system agent detects a change to the database that has been defined as an event and conditions may then be applied to the event to act as a prerequisite or qualifier to determine whether or not the event initiates an action

For example, emails, in-screen messages and faxes can be triggered automatically to notify (action) key people of an entry of a particularly large order (event) exceeding a certain size (condition).

The ECA subsystem is the latest architectural foundation of advancements for workflow enablement. As the name implies, this approach is based on the assumption that inherent in any business process (manual or system based) are three components – an event, possible conditions, and resulting actions. The ECA subsystem is designed to handle processes that range in complexity from simple to very advanced. It is designed for easy implementation and configurable without any programming. ECAs can be used to trigger events such as new calls for customers and/or service representative, past due work orders, or new sales orders for selected customers and/or dollar amounts.

Monitors

- automatically displays data that needs to be checked periodically, similar to flight schedule monitors at airports
- displays text or graphs, without user intervention, based on a user-defined refresh rate where schedulers can monitor load levels, executives can monitor sales activities, help desk managers can monitor service calls, and much more

Interactive Cross-reference Dialogs

- guides users through the selection of desired records from available indexes
- provides interactive use of "specific path cross-referencing", to provide more power and precision in cross-referencing
- reduces time and frustration when sifting through large files for specific data with the intuitive nature of its multiple-choice dialogs

Enterprise Object Technology (EOT) Viewer

- allows users the most freedom possible in manipulating their own data with the ease of MS Windows™ conventions
- allows columns to be rearranged with drag and drop, columns to be sorted with a click on the column heading, and data to be saved to the clipboard, printed or saved to a file
- provides drill-down capabilities in many of the EOT Viewer reports

The EOT Viewer is a Microsoft Com object.

EOT Help

- provides web browser-based Help for those who prefer icon-driven access to help folders

It can be activated or deactivated with a simple \EOT.HELP command.

EOT Concept Functions

- COM-compliant applications that are easier to navigate and use and are activated or deactivated with a simple \EOT command

Tools - Technical Users

The Tools features contained in this section are features that will most interest technical users such as system administrators.

Field Level Security

- incorporates UniQuery's security into Manage 2000, providing field level security with the maintenance ease of security groups
- restricts access to sensitive information, such as wages, but allows access to other information in the same file

Global Time Management

- enables creation of a time zone table to define the relationship between time zones and universal time (at the Prime Meridian), and then converts remote times into local time

Global operations heighten the need for a time converter. For example, a service call may be logged in one time zone, while the responsibility group, the customer, and the facility that processes the RMA reside in three separate time zones.

MIS Recurring Job Scheduler

- provides system administrators with the ability to set up and execute schedules of batch jobs, jobs that can be run at specific intervals without further intervention or resubmission

For example, it may be desirable to run the same jobs every Friday or every period end. Master queues are set up for desired intervals to run specified functions as phantom processes.

Database Utilities for Inlay and Layout Definition

- uses file attribute lists stored on the table master to allow easy modification
- provides standard overlays to facilitate, for example, receipt of cash into a lockbox
- supports data formatting through ICONV, OCONV and FMT
- provides a new connectivity approach to simplify user creation and modification of Cognos[®] views without ODBC and Cognos Impromptu[®]

The define inlay and define layout functions are called **DEFINE.INLAY** and **DEFINE.LAYOUT** respectively.

Fax Update

- enables the use of the EOT viewer to display multiple windows of fax detail and history while simultaneously using the fax functions
- supports VSI-Fax version 4.1.1

Web Publishing

- enables reports and queries (e.g., invoices, shipping notices, sales analysis reports, PO's, documentation, etc.) that can be printed or faxed to be published to the Internet or an intranet
- allows the pages created (actual HTML documents) to be opened for editing using any web publishing tool, included as a link from other pages, or attached to email messages for web-based viewing by recipients

In one scenario, by simply designating a printer as a Web Output device, any report that can be printed to a printer can now be formatted into a HTML web page.

Data published to the Web can come from a variety of sources - Manage 2000 functions and UniQuery output. Even ad hoc commands such as SORT and LIST have been enhanced with new extensions (SORTW and LISTW) to create Web output.

Storage locations for Web Reports are fully configurable at the customer level. A hierarchical structure is used to determine the correct location for any report. Locations may be specified at any level, across a machine, for a company, for a user, or for a function.

Printer Builder

- allows system administrators to create their own printer definitions for use with Manage 2000 and to specify printer specific commands to compress print, set margins, define fonts, etc.

This new function is called **PRINTER.BUILD**.

Documentation

In an ongoing effort to improve Manage 2000 documentation and access to it, the following changes were implemented:

- allows users to access standard Manage 2000 summary level and user reference (detailed) documentation, as well as implementation flowcharts and notes, white papers and focus articles via a Web browser
- enables specific documentation to be quickly and easily accessed using the text search engine, tables of contents, menus and/or maneuvering buttons