

# Guide to Epicor Learning

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## Education Overview

Epicor Learning, Epicor's learning management system, is used to manage training content for all Epicor products. It provides a convenient location for Epicor's customers, partners, and employees to:

- Find and enroll in self-paced courses.
- Register for classroom courses held at Epicor training facilities.
- Track and report your progress throughout the training process.

Education courses are accessed differently depending on the Epicor product and the course type. For example, Epicor 9 education courses are accessed within the application itself. This document explains how to access education courses from within the application and from Epicor Learning.

### Self-Paced Courses

Self-paced courses for Epicor 9 and Epicor for Service Enterprise (E4SE) are embedded within the application and are accessed from the application itself.

Self-Paced courses for Vantage/Vista, iScala, and Enterprise are accessed from Epicor Learning.

### Classroom Courses

Classroom courses for all Epicor products are accessed from Epicor Learning.

## Epicor 9 Embedded Courses

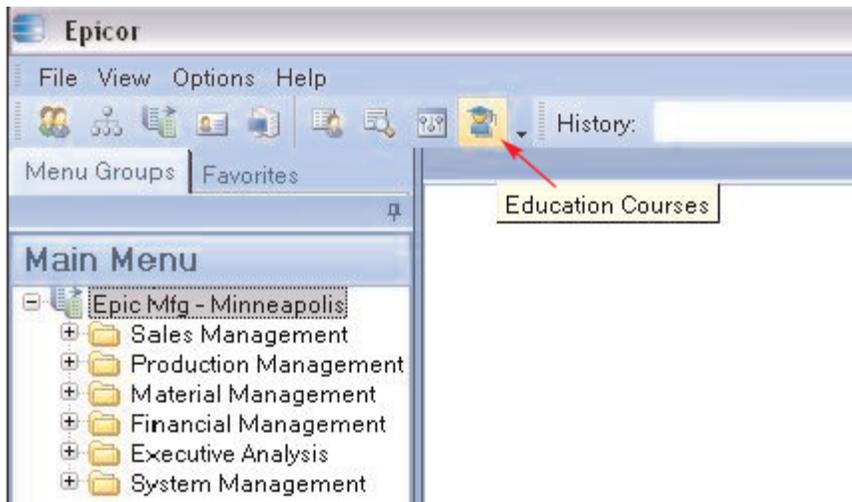
Embedded courses are a new feature of Epicor 9 that allow users to access education courses from within the application. These courses are similar to the self-paced packages offered for other Epicor products, although users can access the courses directly from their application, rather than enroll in them through Epicor Learning.

### Retrieve Your Epicor 9 Embedded Course License

An Epicor 9 embedded course license is needed to access the embedded courses. Follow the below steps to retrieve your license:

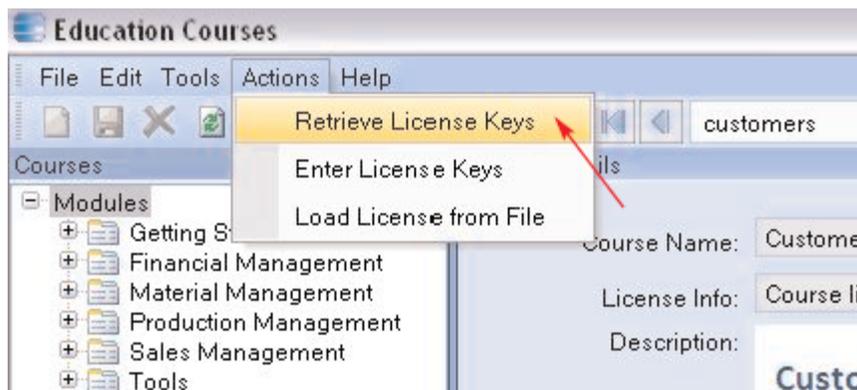
1. Open the Epicor 9 application. On the **Standard** toolbar, click the **Education Courses** button.

Contact your system administrator if the Education Courses button does not display. The Epicor 9 Installation Guide provides specifics on how to install, configure, and license embedded courses.

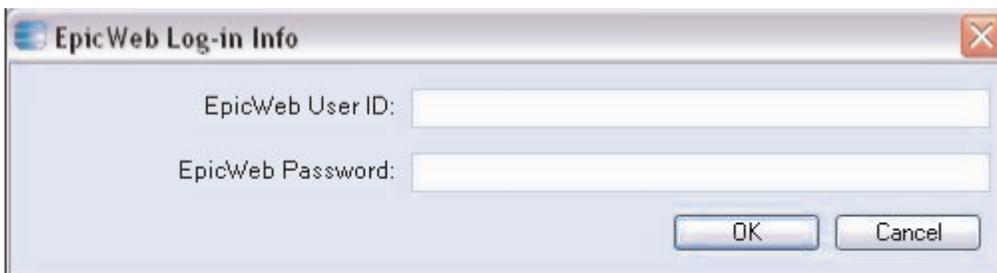


2. The **Education Courses** program displays. From the **Actions** menu, select **Retrieve License Keys**.

**Note:** Unless Epicor's Learning Services team provided your license file (in .xml format), do not use the **Enter License Keys** and **Load License from File** options.



3. Enter your **EpicWeb User ID** and **Password**, and click **OK**. Your EPICweb login information is verified and your embedded course license keys automatically install.



4. On the **Standard** toolbar, click the **Refresh** button to view the embedded courses.

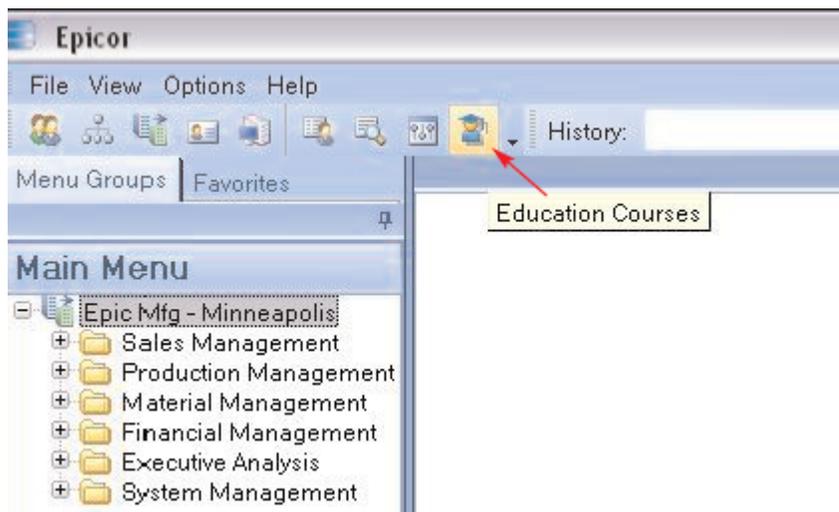
If the embedded courses do not display, close and re-open the Epicor application.

You must retrieve your Epicor 9 embedded course license to access the embedded courses for the first time and when Epicor adds new or updated courses to a service pack.

## Launch an Epicor 9 Embedded Course

1. Open the Epicor 9 application. On the **Standard** toolbar, click the **Education Courses** button.

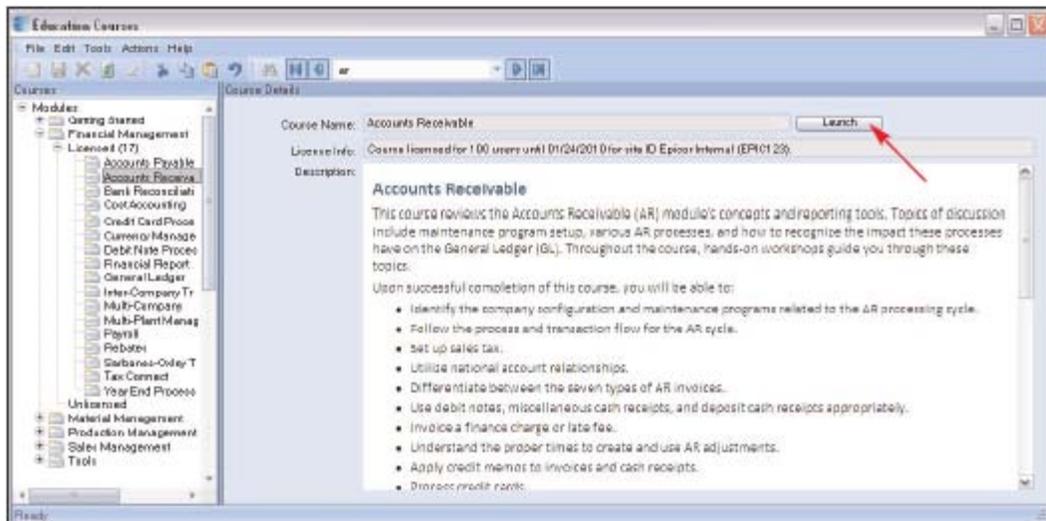
Contact your system administrator if the Education Courses button does not display. The Epicor 9 Installation Guide provides specifics on how to install, configure, and license embedded courses.



2. The **Education Courses** program displays. The program contains a tree view of all the courses organized by track: Getting Started, Financial Management, Material Management, Production Management, Sales Management, and Tools.

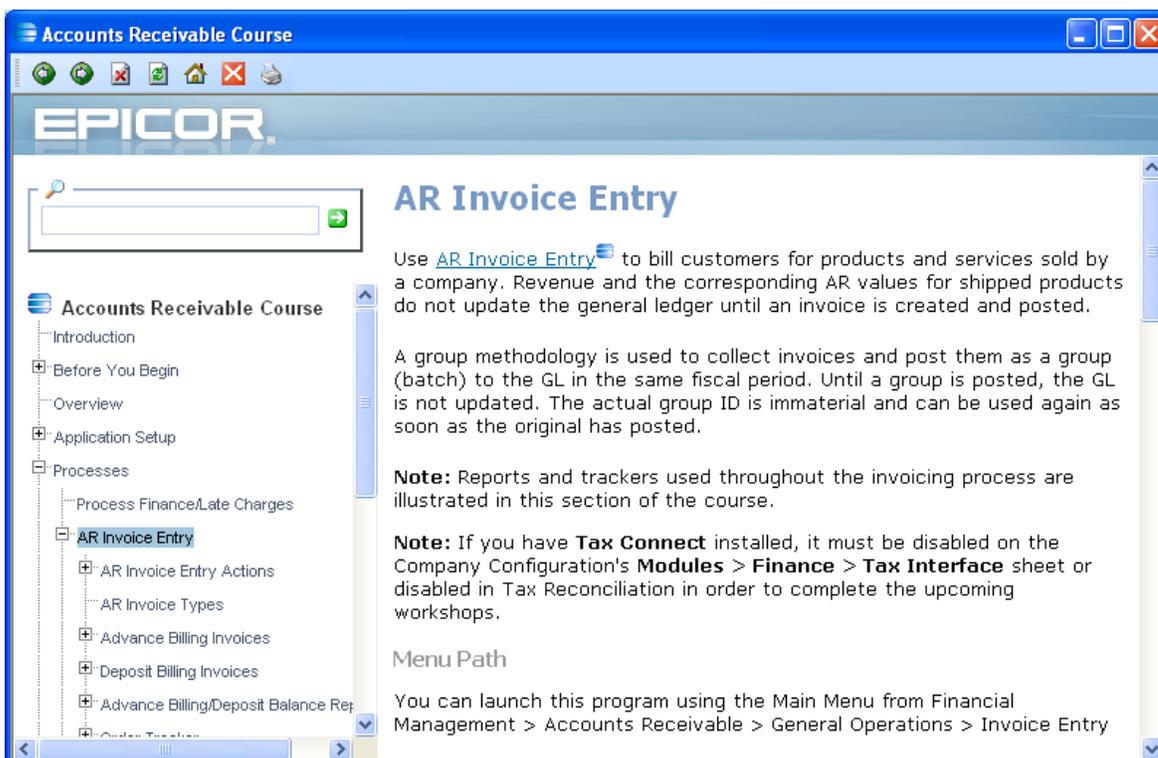
For each track, the program shows Licensed and Unlicensed courses. Select a course to display its course description in the right pane.

3. For a Licensed course, click the **Launch** button.



The course displays in a new window. Note the following:

- Program links (for example, AR Invoice Entry) within the course open programs directly in the Epicor application.
- In the table of contents, select the **Before You Begin** topic to see the course manual link in .pdf format.
- Use the search functionality to quickly locate a course topic of interest.



## Epicor Learning

Epicor Learning is found in EPICweb. EPICweb, the customer portal to Epicor, is your one stop resource for news, product information, support, documentation, and learning. EPICweb is based on Microsoft® SharePoint® technology, so you can quickly access the information you need.

Note that if you do not have a current maintenance agreement with Epicor, you will not see some of the resources shown in the graphics throughout this document, such as the Support and Documentation links.

## Access Epicor Learning

Follow the below steps to access courses from Epicor Learning:

1. Visit <http://support.epicor.com> to create an EPICweb login, or if you have an existing login, go to <https://epicweb.epicor.com> to proceed.
2. In the window that displays, enter your log in information.

EPICweb displays.

3. Click the **Education** tab at the top of the screen.

Here, you will find links to education announcements, user guide information, and product feature summaries.

EPICWEB Home

Support Resources Services **Education** Documentation Community Search

Home > Education

**Support**  
Resources  
Services  
**Education**  
Avanté  
Clientele  
DataFlo  
Enterprise  
Epicor 9  
Epicor for Service  
Enterprises  
iScala  
IT Service Management  
Manage 2000  
ManFact  
Senior Living Solution  
Vantage/Vista  
Administration  
**Documentation**  
**Community**  
**Search**

**Education**

Welcome to Education on EPICweb! Links to frequently accessed items are found below. Use the menu on the left to navigate to the education page specifically geared towards your product; here you will find a link to Epicor Learning, datasheets, and more!

**Announcements**  
The Education and Documentation Announcements section allows you to view the latest announcements and other communications related to Epicor products' education and documentation initiatives. Keep your business up to date and find ways to improve the processes within your business by leveraging this information.

**Documentation**  
Access documentation for past and current product releases. You can find installation guides, service pack documents, online help, and more by product brand. (You must have a current maintenance agreement with Epicor to access this link.)

**Feature Summaries**  
Find out what's new in your application. Each Feature Summary provides a high

**User Guides**  
Epicor has a growing series of User Guides available for purchase. Each User Guide

**Quick Links**

- Epicor.com
- Contact Epicor
- Provide Feedback
- Update Contacts
- Change or Reset Your Password
- My EPICweb
- Submit Support Call

**More Information**

- Upgrades and Migrations
- FYI Newsletter
- Submit Education Request

4. Select your Epicor product, either in the left navigation bar or under the Education tab at the top of the screen.

EPICWEB Home

Support Resources Services **Education** Documentation Community Search

Home > Education > Vantage/Vista

**Avanté**  
Clientele  
DataFlo  
Enterprise  
Epicor 9  
Epicor for Service  
Enterprises  
iScala  
IT Service Management  
Manage 2000  
ManFact  
Senior Living Solution  
**Vantage/Vista**  
Administration

**Education**

Welcome to the Vantage/Vista education page on EPICweb - your portal to education-related announcements, datasheets, classroom information and more!

Click the Find A Course button below to launch Epicor Learning where you can run an online course at your own pace or enroll in a classroom course held at an Epicor training center.

Have a question for the Epicor education team? Submit an [Education Request](#) and a member of the education team will contact you within one business day.

**Find A Course**

MSG Login

**Quick Links**

- Epicor.com
- Contact Epicor
- Provide Feedback
- Update Contacts
- Change or Reset Your Password
- My EPICweb
- Submit Support Call

**More Information**

**All-Important Links**

- Education and Documentation Announcements
- Feature Summaries
- User Guides
- Submit Education Request

**Classroom Information**

5. In the middle of the screen, click the **Find a Course** button to access Epicor Learning.

## Differences between Self-Paced Packages and Recorded eLearning Sessions

A self-paced package includes a self-paced course and course manuals.

The self-paced course displays the course content in an Internet browser window. You can navigate to the course topics you need and go to a live system for immediate hands-on learning. The self-paced format, the same format Epicor instructors use in the training facilities, allows you to control your learning experience.

Course manuals are the self-paced course in .pdf format. You can use these manuals to write down any tips or notes during training. The instructor manual is the student manual with additional information such as demonstrations and example information.

Recordings are webcasts streamed over the Internet to your computer. All you need is an Internet browser, speakers, and the WebEx™ Player. In a recording, an Epicor education instructor walks you through the self-paced course in a narrative format, interjecting real life scenarios from the instructor's experiences. Throughout the recording, the instructor demonstrates the topics discussed on a live system. You can start, pause, and fast forward the recording to control your learning pace. This control allows you to access your live system for immediate hands-on learning.

## Self-Paced Course and Recording Viewing Requirements

To view a self-paced course, you must use Internet Explorer® as your Internet browser.

The first time you play a recording, the WebEx Player plug-in automatically downloads and installs on your computer, provided you have the appropriate permissions. Epicor recommends you use Internet Explorer® as your internet browser, and a computer with a Windows® operating system and a 56K modem connection or better (128K is preferred).

## Enroll in a Course

Follow the below steps to enroll in a course from Epicor Learning:

1. On your EPICweb product Education page, click the **Find a Course** button to open Epicor Learning.

Your **My Courses** page displays. This page lists all courses, both online and in the classroom, in which you are currently enrolled.

**My Courses - MSG Login**

You are viewing your My Courses page. This page lists all courses, online and classroom, you are currently enrolled in. To begin an online course or continue taking an online course, click on the course title.

**FIND A COURSE:** Click the Courses or Buy Courses tab located on the left of your screen.

Category: All Categories Total: 168

Code	Title	Type	Availability
<b>Financial Management (online - recordings)</b>			
<input type="checkbox"/>	EDE8434803406_C	8.03.406: Bank Reconciliation Recorded eLearning Session	Online Open
<input type="checkbox"/>	EDE8922803406_C	8.03.406: Credit Card Processing Recorded eLearning Session	Online Open
<input type="checkbox"/>	EDE8917803406_C	8.03.406: Currency Management Recorded eLearning Session	Online Open
<input type="checkbox"/>	EDE8930803406_C	8.03.406: Debit Note Processing Recorded eLearning Session	Online Open
<input type="checkbox"/>	EDE8512803406_C	8.03.406: Sarbanes-Oxley Tools Recorded eLearning Session	Online Open
<input type="checkbox"/>	EDE8932803406_C	8.03.406: Tax Connect Recorded eLearning Session	Online Open
<input type="checkbox"/>	EDE8917803_C	8.03: Currency Management Recorded eLearning Session	Online Open
<b>Financial Management (online - self-paced packages)</b>			
<input type="checkbox"/>	ED807803400SP_C	8.03.400: Accounts Receivable Self-Paced Package	Online Open
<input type="checkbox"/>	ED808803400SP_C	8.03.400: Cost Accounting Self-Paced Package	Online Open
<input type="checkbox"/>	ED801803400SP_C	8.03.400: General Ledger Self-Paced Package	Online Open
<input type="checkbox"/>	ED806803404SP_C	8.03.404: Accounts Payable Self-Paced Package	Online Open

2. To enroll in additional courses, click the **Courses** button in the left navigation bar.

The course catalog displays. The two types of courses are online and class. Online courses allow you to learn at your own pace. Classroom courses involve instruction at an Epicor training facility with an Epicor instructor.

To choose one or more courses, check the box in the Enrollment column. When you are done, click the Enroll button.

**NOTE:** If you have a current subscription program, the price is waived for the courses in the following categories:

- **Premier Subscription Program:** online - recordings; online - self-paced packages; most instructor-led classes held in regional training facilities (refer to the [Premier Subscription Program](#) policy for details)
- **Online Plus Subscription Program:** online - recordings; online - self-paced packages
- **eLearning Subscription Program:** online - recordings

1 of 5 | All Categories | Search for |

Course Title	Price	Enrollment
<b>Financial Management (class)</b>		
<a href="#">Accounts Payable - Irvine, CA - Epicor Headquarters - Sep 23 2009</a> Start Time: Sep 23 2009 9:00a End Time: Sep 23 2009 5:00p Type: <a href="#">Class</a>	\$595.00	<input type="checkbox"/>
<a href="#">Accounts Payable - Minneapolis, MN - Epicor Office - Nov 11 2009</a> Start Time: Nov 11 2009 9:00a End Time: Nov 11 2009 5:00p Type: <a href="#">Class</a>	\$595.00	<input type="checkbox"/>
<a href="#">Accounts Receivable - Irvine, CA - Epicor Headquarters - Sep 22 2009</a> Start Time: Sep 22 2009 9:00a End Time: Sep 22 2009 5:00p Type: <a href="#">Class</a>	\$595.00	<input type="checkbox"/>
<a href="#">Accounts Receivable - Minneapolis, MN - Epicor Office - Nov 10 2009</a> Start Time: Nov 10 2009 9:00a End Time: Nov 10 2009 5:00p Type: <a href="#">Class</a>	\$595.00	<input type="checkbox"/>

You can search for a specific course in several ways:

- **Category:** Select a category from the All Categories drop-down list and click the Find button. Courses are categorized by type - online and class. Vantage/Vista has several categories and these are based on course type and functional area, for example, Vantage/Vista – Sales Management (online) and Vantage/Vista – Sales Management (class).
- **Title:** Enter the course title in the Search for field and click the Find button.
- **Code Prefix:** Enter the course code prefix in the Search for field and click the Find button.
- **Release:** Enter the release in the Search for field and click the Find button.
- **Keyword:** Enter a keyword in the Search for field and click the Find button.

Categories, titles, and code prefixes are found on the curriculum roadmap for your product. Links to the curriculum roadmaps are on your product's EPICweb Education page under More Information.

3. To view the course overview, click the course title.
4. When you locate a course you are interested in, select the check box to the right of the course.
5. Click the **Enroll Now** button.

You can select multiple check boxes to enroll in multiple courses at the same time.

6. To the message that displays, click the **Confirm** button to confirm the selected courses.

Your **My Courses** page displays again. The course(s) you just enrolled in now displays in the list.

## Begin a Course

Follow the below steps to begin a course:

1. On your EPICweb product Education page, click the **Find a Course** button to open Epicor Learning.
2. On your **My Courses** page, from the course list, click the course title to begin or continue a course.

## Cancel a Course

Follow the below steps to cancel a course:

1. On your EPICweb product Education page, click the **Find a Course** button to open Epicor Learning.
2. When your **My Courses** page displays, from the left navigation bar, click **Withdraw**.

A list of the online courses you have not begun and the classroom courses that are more than 10 business days prior to the start date of the class in which you are enrolled in display.

The screenshot shows the EPICOR MANUFACTURING interface. On the left is a navigation menu with options: Courses, My Courses, Profile, Grade Book, Help, Withdraw, Wait List, and Log Off. The main content area contains instructions and a table of courses.

To withdraw from an online course that you have not started or from a classroom course that is more than 10 business days prior to the start date of the class, click the Withdraw button for that listing.

NOTE: Contact Epicor Education to withdraw from a class that is 10 business days or less from the start date of the class. Click [here](#) to review the Class Cancellation Policy.

Code	Title	Type	
<b>Financial Management (online - self-paced packages)</b>			
<input type="radio"/> ED806803408SP_	8.03.408: Accounts Payable Self-Paced Package	Online	<input type="button" value="Withdraw"/>

3. Click the **Withdraw** button next to the course(s) you wish to cancel.
4. To the confirmation message, click **Yes**.

Contact Epicor education at [education@epicor.com](mailto:education@epicor.com) to withdraw from a class that is 10 business days or less from the start date of the class.

## Check Your Self-Paced Course Status

For self-paced courses, you must complete the course exam in order for the course status to change from **In Progress** to **Completed**.

Follow the below steps to change the course status to Completed:

1. On your EPICweb product Education page, click the **Find a Course** button to open Epicor Learning.
2. On your **My Courses** page, click the course title for which you want the status to change to Completed.

- Click the **Exam** button at the top of the screen.

**EPICOR** Syllabus

MANUFACTURING

**My Courses**

**Syllabus**

**Communicate**

**Grade Book**

**Help**

Log Off

**Course:** 8.03.408: Accounts Payable Self-Paced Package  
**Lesson:** Self-Paced Course  
**Topic:** [View the self-paced course](#)

**Exam** **Team**

The self-paced course contains the course content in an Internet browser\* where you can navigate to the course topics you need and go to a live system for immediate hands-on learning. The self-paced format, the same format used by Epicor instructors in the training facilities, allows you to control your learning experience. For a recording on how to navigate in a self-paced course, click [here](#).

**When ready to view this self-paced course, click [here](#).** A new Internet browser window will open. In this window, click on the sections within the table of contents to find the course topics you need. When finished viewing the self-paced course, close the Internet browser window.

\*You must use Internet Explorer® as your Internet browser to view the self-paced courses.

**Other Topics:** **Next** ▶

- Click the **Continue** button to take the exam.
- To the question **Do you want to mark this course as complete?**, select **Yes** from the drop-down list.
- Click the **Submit** button.
- Click the **Quit** button.

The course status changes to Completed.

**Note:** Typically, the exam is found in the Recording or the Self-Paced Course lesson.

## Closed Classroom Sessions

If a classroom session is closed, you can either enroll in the same class at a different location or place yourself on the waitlist for the class.

Follow the below steps to place yourself on a waitlist:

- On your EPICweb product Education page, click the **Find a Course** button to open Epicor Learning.
- On your **My Courses** page, in the left navigation bar, click the **Wait List** button.
- Select the closed class, and click **Submit**.

If an opening becomes available, Epicor education will contact you.

## Manage Your Epicor Training

An organization's Education Administrator can manage the education courses for all users in the organization. Call Epicor Support to request to be assigned as the Education Administrator for your organization. You will be asked to provide your name, email address, organization's name, and site ID.

After you are assigned as the Education Administrator for your organization, two additional items are available on your product's EPICweb Education page.

First, below the **Find A Course** button, a drop-down list of all the users at your organization who have an EPICweb account displays. After you select a user from this list, wait while the screen refreshes, and then click the **Find A Course** button. Epicor Learning launches with that user in view, allowing you to manage that user's education courses.

The screenshot shows the EPICWEB Home page for the Education section. The navigation menu includes Support, Resources, Services, Education, Documentation, and Community. The main content area has a 'Find A Course' button and a dropdown menu for user selection. The dropdown menu is open, showing the following users: MSG Login, John Cortis, Kerry Williams, Monique Nabal, Lisa Malenfant, and Aliber Medrano. Below the dropdown is a 'Your Company Education' table with navigation controls (1 of 4, 100%, Find | Next).

Second, at the bottom of the screen, a **Your Company Education** table displays. This table, organized by user, lists the courses in which the user is enrolled. Each course line includes the following information:

- Course title
- The date the user enrolled in the course if it is a class or the date the user started the course if it is an online course
- Course status (Not Started, In Progress, or Completed)
- Course price as listed in Epicor Learning (Note the price may not reflect the education subscription you have with Epicor.)

A highlighted course line indicates a new enrollment.

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