



EPICOR IMPLEMENTATION

Good afternoon CCT,

Here is the **third** update. New information has been highlighted.

Non-transactional data loads are complete. They went very well with very few errors to clean up. At this point the only remaining data to be loaded is the last minute stuff like inventory and GL balances.

Many of you have completed the login survey from Rob and that is great. Keep it up! For you plant managers and area supervisors, it is on you to make sure that everyone who will be using a handheld device or accessing Epicor on a computer logs into our Live environment this week and sets up their password. **This is a critical step that we all must do to set up our new passwords for access to Epicor.** Part of that survey is a way to reach out for help. Please do so ASAP, so we can fix any access problems now rather than on the day of Go-Live.

Here is an outline of the Cut-Over Plan for the coming weeks:

Week of 5/25: Cut over week – no new base data allowed in Macola, only transactions:

- Continue training in Additional/Third or Pilot
- Everyone must log into the “Client/Live” environment this week to set their password and verify access. Instructions to follow.
- Planning
 - o RTV
 - No new RTV’s in Macola. Can launch in Epicor now if needed.
 - Must close out all existing RTV’s in Macola.
 - o Transfer Orders
 - No new Transfer orders in Macola.
 - Inventory on open Transfer orders will be loaded into the “from” location, back where they started and a new Epicor Transfer order must be created.
 - o New parts/Activations
 - As of today (5/21) all new parts must be created directly in Epicor.
 - All new part activations that are still open will have to be processed in Epicor.
 - All item/location activations that are still open will have to be processed in Epicor.
 - o Purchase Orders/Suppliers
 - By 5/29 close all PO's and re-enter into Epicor.
 - Blanket PO's: Close all blanket PO's during week and issue new PO's for replacement with remaining quantity.
 - Starting on 5/25 new Suppliers must be entered manually in Epicor.
 - o Jobs (aka Shop Orders)
 - By 5/29, close all jobs and re-enter into Epicor.
 - If we need a new job and we can complete it on or before 5/29, then enter in Macola.
 - If we need a new job and we cannot complete it on or before 5/29, then enter in Epicor.
 - If we find that we made a mistake, then enter the job in Epicor for the remainder.
 - For freezer jobs, if they will be "frozen" on or before 6/1, then just end them early in Macola on 5/29.
 - For freezer jobs, if they will not be "frozen" on or before 6/1, then do the following:
 - UN-issue the ambient material from the shop order in Macola.
 - Cancel the job in Macola.
 - Create a new job in Epicor with the appropriate end date.
 - o Make sure to have comments on the shop order linking to Macola shop order.
 - On 6/1 issue the ambient material to the Epicor Jobs.
 - Start entering Jobs in Epicor starting 5/25 to plan ahead for the week of Go-Live.
 - o Orders (aka Sales Orders)
 - When taking new orders, if we can ship sales order on or before 5/29 then enter in Macola.

- If we find that we were wrong, then we will have to duplicate the order in Epicor. It will have a new order number.
 - When taking new orders, if the order cannot ship until after 5/29, then enter it in both Macola and Epicor.
 - This will ensure we see the demand in both systems.
 - After 5/25 new Customers must be entered manually in Epicor.
 - Notify EDI customers to switch to the new EDI mailbox.
 - Review open order list and close all orders by 5/29, replace with orders in Macola as needed.
- Synergy
 - Available up to and including Thursday 5/28.
 - Synergy will be unavailable starting at 9PM EST on 5/28.
 - Synergy will be back on line with a new look at feel on 6/1 along with Epicor.

Saturday 5/30 4:00 am EST: Macola Shut down, no more transactions in Macola...ever.

- This coincides with month end and we often try to ship on Saturdays at month end. We will not be able to ship in the system on this Saturday. If we must physically ship on Saturday, the transaction must happen either in Macola on Friday OR in Epicor on Monday.
- IT and Finance will spend Saturday and Sunday finishing up the final Data transfers from Macola to Epicor so neither system will be available.
- The Epicor 3rd and Pilot environments will be open for anyone who wants some additional training or practice.

Monday 6/1 GO LIVE! - We are working in Epicor exclusively – no more transactions in Macola. Our Macola database will still be around and available for looking up historical data.

We fully expect for there to be some hiccups during Go Live. The entire IT department, as well as our team of Epicor consultants, will be on call for trouble shooting.

We'll also have open Zoom meetings running all day for people to call in to for assistance.

Just click on the appropriate zoom meeting link below for support:

[Finance Go Live Zoom meeting 978 6241 8211](#) Starring Kathleen Aker

[Production/Shipping/Receiving Go Live Zoom meeting 985 3053 1063](#) moderated by Darius Jonason with special guest Alex Pena

[Planning Go Live Zoom meeting 959 1463 5180](#) hosted by our very own Chris Welch

[Connecting/logging in/IT Live Zoom meeting 914 3547 8166](#) with Steven Picard, featuring guest appearances by: Rob Gallo, Matt Ng, Christine Wilder