

Epicor Eagle N Series: Getting Started

Welcome to getting started with Epicor Eagle N Series. So this video is meant to serve as a primer to stage you for what to expect, and for what's to come in the upgrade process from Eagle for Windows to Eagle N Series. Before we continue this video assumes that you have already upgraded to Eagle release 24. Now if you've not upgraded yet, we suggest that you visit our customer support web site at Epicor.com/EagleCustomerSupport where you can watch what's new on release 24 which will trigger the shipment of your new software. So in this video we'll be talking about the path to Eagle N Series, how to configure the new features, what system requirements of expectation should be in place, and what help resources are available to you as you go through this upgrade and implementation. And last we'll end with an Eagle N Series checklist to make sure that you have everything in place for you to implement a powerful new features that Eagle N Series can bring your business.

Topics

- The Path to Eagle N Series
- Configuring the New Features
- System Requirements & Expectations
- Help Resources
- Eagle N Series Checklist

The Path to Eagle N Series

The path to Eagle N Series starts as we mentioned before with the upgrade to release 24. This is the base software required to enable Eagle N Series. It's worth mentioning that the last major release of Eagle software was release 22.1. Release 23 was used internally only to test all the functionality and technology behind what you'll find in Eagle N Series. Once you're on release 24, you can place an order for Eagle N Series. It is a free upgrade and there are two ways you can go about getting it. You can place a standalone order or if you've recently purchased a core upgrade it comes as part of the Software Technology set. By placing an order your account manager can assess your current configuration and make sure that you have all the requirements necessary for upgrading to Eagle N Series.

After the order is placed, there is a series of training materials that we've made free and available to you as well to help you understand the upgrade process, such as the video you are watching now, and a series of online training videos either supported through Training On Demand or hosted on our customer support website. Now these videos show you all the intricacies of Eagle N Series as far as how you configure it and the what features and functionality come with the software so that you can know how best to implement them and deploy them within your businesses. And of course our online help has been upgraded to include the Eagle N Series content.

Once the order has gone through, and Epicor has licensed your software for Eagle N Series, you'll be able to use what you've learned in the training materials to configure Eagle N Series for your business.

Eagle N Series is packed with new features and functionality that help you excel in your business. In order to take advantage of these features some configuration is required. When you launch Eagle after licensing has enabled on your system, it's going to look a lot like it always has. What we're going to talk about next is what you have to do to enable these new features in order to get your Eagle to look like this. You'll have to go through those compatibility

settings to configure your Eagle to run in the new user interface. We've built the compatibility settings so you can roll out the new Eagle as it makes sense for your business and your employees.

We did this to ease the transition. As you can see here this looks very much like the customer maintenance that you're familiar with. But it has new tools, new features such as the ribbon menu, favorites, new file menu, a support bar that you'll see up at the top.

You'll also notice that in application's we have embedded analytics. These leverage the analytics toolset that we have from our other Compass applications. Now in order for these to appear in your system, you'll have to turn them on to the compatibility settings but you'll also need to install the Compass for the TFP client.

Other functionality that is tied to the Compass or the TFP client installation can be see here. The embedded analytics which we just saw, custom fields would allow you to create and track new fields for customers vendors and items, and the inventory drill into market basket affinity reports. Eagle N Series enables a quick link to market basket affinity right from the inventory maintenance screen, so you can gain quick access to what is selling with popular items.

New to the ribbon menu and the Eagle applications is what we're calling the support bar. In the support bar you'll see a link for Training On Demand, which requires a TOD subscription, Advice Line Chat, which requires gold or platinum support levels. And Eagle Community which only requires you to log in and create a username and password to start participating in our Eagle forums.

If you want to leverage the embedded TOD content from within applications, a user would simply click on the file menu of any application that has ribbon menu, click on the configure tab, and then click setup Training On Demand. A dialog box will appear prompting you to enter your Training On Demand username and password.

Now entering that information here and clicking OK, will assign this username and password for TOD to your Eagle user and will follow you around through all your applications. This only has to be done once, and you'll be able to start recognizing the value of the integrated training content. now from within the application, you can click Training and you can see quick video that are associated with that application to help to get quick answer and to get you back on your way.

Configuring the New Features

Let's take a look at how you'll configure Eagle N Series and the features that we just discussed. From the Eagle browser you'll click on the file menu and you'll see a new utility called compatibility setting. This opens up a new application which allows you to configure how you want your Eagle to function. Now what we're going to talk about here is really just a high level overview to get you thinking about how you or may not want to configure your station. There will be a in depth training video available to you as part of the Training on Demand catalog, or hosted on our customer website to support you in upgrading your software to the Eagle N Series.

Taking a look at this screen, you can see a list of the applications that employ the new ribbon menu. You can simply select them and use the arrow key to move them into the box desired. So here currently the applications are locked to load as Eagle N Series. But you could move them around. You could have Eagle browser open up in Eagle N Series, but maybe you want Accounts Receivable to launch as the Eagle for Windows that are used to.

On the right see compatibility options. These allow you to fine tune your configuration of Eagle N Series. For example if you want the Compass features if we talked about to appear within the Inventory Maintenance, Vendor Maintenance, or Customer Maintenance screens, you can click on the Compass features hyperlink, and turn the on or off per application from this utility.

Now you can do overrides at the terminal level or you can use options configuration, to go in and make global changes to all these options. This utility drives the options configuration of the background and allows you to override them at the terminal level.

Another good example of when and where you may want to use the compatibility settings would be in Point of Sale. Here you see the new Eagle N Series Point of Sale screen with the ribbon menu at the top. When you install Eagle N Series and you launch Point of Sale, this will be defaulted to use the toolbar that are used to. That toolbar has the F keys that you are familiar with, and will likely be best used at cash and carry or high transaction volume Terminals. However you may have a contractor desk where there are a lot of special orders being created and you can leverage the new toolbar and new ribbon menu. You may want to turn that on at that station only. Going back to the compatibility settings, you can select Windows toolbars, and for any of the applications where you'd like to use the F keys instead of the new ribbon menu, simply select yes and click OK. Save your changes, and once you've applied them, you launch the application and you'll be back to the toolbar that you're used to or that you desire. Toggling those back and forth can help you configure Eagle N Series to your needs and to the specific needs of your users.

System Requirements & Expectations

Now on a somewhat related topic to compatibility mode and also to your readiness to upgrade to Eagle N Series are requirements. Your Eagle server must be 4 GB of ram or greater, must be at Eagle OS2 or 3, and must have internet connectivity and you must have eConnect enabled. Now the PC or terminal that's running Eagle N Series should have 2 GB of ram or greater for normal operations. We recommend 8GB of ram for terminals running any of the analytics functionality. Now we support Windows 7, 8, or 8.1, and the Windows server that you see here. But note, that Eagle N Series will not install a windows 2000, XP, or Vista. And as we mentioned before, your Eagle software must be on release 24 or higher and if you're running Total Rental or Point of Sale Touch terminals, they must be configured with that configuration tool as Eagle for Windows.

Now we've gone through great lengths to make sure that Eagle N Series supports many of the devices that you've employed in your business over the past few years. Seen here are a list of devices that cannot be supported in the new technology. If you have any questions, please check with your LPS for more information.

Now some users may notice there is an extra second or two when they are launching applications. This is due in large part to the new features and functionality that you find in the ribbon menu or in the embedded analytics. If you notice a PC is running much slower than it did before, you may want a look at its hardware. If you find that your PC is at or below the minimum requirements you may want to use the compatibility tool to turn off some of the features for that application or for that terminal. If your hardware is below the minimum requirements, you can always use the compatibility setting to turn off features like the embedded analytics.

So before upgrading to Eagle N Series, all your terminals were running Eagle for Windows. Here's a look at some of the configuration options that you can have after upgrading to Eagle N Series. So if you have a terminal that is below the minimum PC requirements, or maybe it's running Windows XP, you can leave it in Eagle for Windows and upgrade that terminal at a later time. You can also choose to take advantage of the Eagle N Series look and feel, the ribbon menu, the new features, but turn off the embedded analytics. This is most likely the settings you would have for a Point of Sale terminal. And lastly of course you could run Eagle N Series with all the features including the embedded analytics.

Help Resources

Now in the beginning of this video we talked about some help resources that would be available to you. First on the list is what you're watching right now, the Getting Started video. But we've also included a series of video to help you learn and implement the Eagle N Series for your business. We've leveraged our TOD application to build Eagle N Series content. And if you're a TOD subscriber, you'll have access to them through the Training On Demand application.

If you've not yet subscribed to Training On Demand, we're making all this content available to you on our customer support page. And of course our online help has been updated to include the Eagle N Series content. Whether you access the content through TOD or through our customer website, you'll see two categories of information. The first is an Eagle N Series overview, which includes information about the Eagle N Series user experience and support. To further the discussion on help resources, there will be a course on how you can leverage the embedded Training On Demand, chat, online help, and our Epicor community of users. The Introduction to Eagle Browser will talk about the new user interface, how to set up favorites and how to navigate through the new Eagle N Series. And that series will wrap with an Introduction to Eagle Viewers.

The second step gets into more of the implementation of new features and functionality in the Eagle N Series expanded functionality. Here again we'll start with an overview of what you should expect. Then there will be detailed content revolving around the label printing workflow, the new Special Order Streamline configuration, the PO Archive Viewer enhancements, the Embedded Analytics and Compass features, the User Defined tabs and fields and it will end with an in depth course on the compatibility settings that we introduced in this video.

To access the content as I mentioned before Training On Demand subscribers can visit OnDemand.epicor.com and use their Training On Demand login. And if you're a non Training On Demand subscriber, visit our customer web site at www.epicor.com/EagleCustomerSupport.

And of course as you can see here we've updated our online help to include the new features available in Eagle N Series. Shown here, our help documents to assist you with the compatibility settings.

Eagle N Series Checklist

So let's review what you need to do in order to get Eagle N Series up and running in your business. First make sure release 24 is installed. Make sure that you've placed an order with your account representative. Epicor licensing will then enable the software. View all the Eagle N Series supporting video content, and then enable your terminals to take advantage of the power of Eagle N Series.

Thank you for partnering with us to improve Eagle and to make the Eagle N Series possible. we're excited about how this new technology will put you in a position to out service your competition and to grow your business.

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