

Epicor ERP Kinetic Customer FAQ

Epicor Kinetic General Questions

What is Kinetic?

Epicor Kinetic provides a clean, intuitive, and easy to use experience for all ERP users. By utilizing modern research in user interface design, Kinetic delivers consistency in navigation, simplified visuals that reduce the clutter and noise from your daily tasks, and improved accessibility and productivity. Over time Epicor Kinetic design will be applied to all ERP forms.

What is the difference between the Kinetic and classic versions of forms?

Designed with the user in mind, Kinetic forms have a streamlined user interface with expandable and collapsible panels which provide easy access to information but only when you need it. Classic forms have a tab structure which requires you to click through tabs to get to the information you need, often times requiring more clicks to access data. In most applications the functionality and business logic will not change, however the layout and navigation will.

Can I still run the classic version of a form that has been converted to Kinetic?

Yes, you can choose to run the classic version of any Kinetic form. You configure the default form to use in Menu Maintenance for each form. The default value is to open the form in the Kinetic UI, with the ability to override globally by an administrator or by user. You can also use Kinetic Application Maintenance to control which forms default to Kinetic by company, menu, and form level.

Can I still use classic forms that have not been converted to Kinetic during the transition?

Yes, during the transformation you can use both classic and Kinetic versions of a screen. Forms not yet converted will open in the same smart client window. You will continue to log into one system from the same home page. When you select a menu item, the form will either open in Kinetic or the classic version depending on your settings and whether it has been converted yet.

Do I need a special license to enable Kinetic applications in my environment?

No, you do not require a special license to access any of the Kinetic applications that have been released.

Are there plans to phase out the Classic forms?

To make it possible to promote Kinetic adoption among your workforce in a phased approach, Epicor will continue to support both the new Kinetic forms and the Classic (existing) forms throughout the rollout of Kinetic and beyond for a period of time in alignment with our product lifecycle policy. Our plan is at Epicor ERP 11, the next release of Epicor ERP, to stop enhancing the Classic forms once the Kinetic UI has reached maturity. Therefore, getting started early gives your team a greater window to transition to the new experience, reducing the disruption for your business.

Can I customize a Kinetic Report or Process form?

Yes. In 10.2.600 we released the Epicor Application Studio which allows you to easily modify and tailor Kinetic forms to your unique business needs.

What is Epicor Application Studio?

Epicor Application Studio is a powerful toolset that allows users to customize Kinetic applications that are upgrade friendly and require low/no-code.

Can I personalize a Kinetic Report or Process form?

Yes, in 10.2.700 you can personalize Kinetic forms.

What if I currently have a customization on a form that was converted to Kinetic?

You can still use your customized forms by launching the classic version. By default, the application opens any form in the classic UI when you have a customization attached to it.

As an administrator, can I globally set access to Kinetic forms for all users?

Yes, as an administrator you can define Kinetic as the default form that launches for each form and user in Kinetic Application Maintenance.

Can I still use a custom report type on a form that was converted to Kinetic?

Yes, you can still generate the same report output that you do today.

What is the recommended monitor size for users to view kinetic forms?

Our screens are designed at 1440x900, and work best below 1920 px, depending upon your size preference.

Do Kinetic applications support quick searches?

Yes, currently Kinetic applications support both quick searches and BAQ searches.

Do Kinetic applications still allow right-click functionality?

Yes, Kinetic applications support the right-click (Open with) functionality.

When I build or modify a dashboard, can I still deploy the classic version?

Yes, you have the option to deploy a dashboard to the Kinetic UI or to the classic version. Classic dashboards will continue to work, and you can still deploy dashboard assemblies and use your customizations on top of them. At a future release we expect to announce they will move to sustaining support once Kinetic dashboards have full feature parity.

On a Kinetic dashboard, do the panels always default as collapsed?

You have the ability to configure the panel card default (open versus collapsed) in personalization and in Epicor Application Studio.

Can I embed a dashboard into a Kinetic application?

Yes, as of 10.2.700 Data Discovery Business Intelligence views can be embedded within a Kinetic screen with Application Studio.

Can I export to excel from a Kinetic application?

Yes, you can export data to Excel and paste insert data into the ERP application from Kinetic apps.

Do Kinetic dashboards with Updateable Business Activity Queries (BAQs) support custom actions?

Yes, Updateable BAQs support custom actions, field changes and validations.

Can I pass BAQ parameters without a prompt?

Yes, parameters and passing is supported.

Can I apply a theme or color to a specific company, site, or environment?

Yes, you can apply a color to the company/environment URL to indicate which company a user is logged in to.

Would there be the possibility to add our own colors and more color options than currently having only 4 for the Rules?

We may do this at some point, but for now we only have meaning based colors (good, warning, error, information) which match our theme.

Can hot keys be setup as global for all users?

Yes, there are global hotkeys, and you can set up additional hot keys in customization layers using App Studio to make them apply to everyone using the screen.

Will the performance and memory management change with Kinetic applications?

RAM usage is higher per form that you have open, however, closing kinetic forms frees up memory unlike the smart client today. We are seeing a slightly higher memory usage, but it nets over time and we do not expect to have to increase guidance higher than 4GB RAM for users.

Can I run the Kinetic UI fully in the browser in 10.2.700?

Yes, you can open the Kinetic Home Page and use any kinetic applications in a browser (including Dashboards you publish to Kinetic UI). Anything that has not been converted but is available in Epicor Web Access (if configured) will open in the browser. We will continue to support EWA for a period of time (TBD) after the transition to Kinetic is complete.

How will Kinetic adapt to smart devices (tablets and phones)?

In Epicor 11 we will be officially supporting screens down to phone sizes, though not all screens will perform well on all phones. Additionally, in Epicor 11 we will be adding layers specific for mobile device types so that you can make a customized version of screen for a tablet or a phone in application studio.

Can I use a browser on a Mac?

Yes, we support the latest version of the following browsers: Chrome, Safari, Firefox, Edge.

Can you have multiple Kinetic tabs open at the same time?

Yes, you can have multiple Kinetic Apps open at the same time.

Will we get deep linking inside of the Kinetic applications so that we can launch screens in new Chrome tabs?

Yes, we have deep linking on our roadmap so you could include a link in an email and open ERP from there.

What about arbitrary changes made to browser technology by the various browser software companies? How does Kinetic manage this?

Web browser vendors are highly collaborative through standards organizations like WHATWG and WCAG and generally speaking do not make “arbitrary” changes. They’re very transparent and public about their planning process. All the major vendors publish information in advance about changes they intend to make to their browsers and especially for disruptive changes explain why. We manage this the same way everyone who builds web applications does, by staying up to date on emerging web standards and having team members responsible for reviewing the big browser team’s public updates for breaking changes. Breaking changes which are potentially disruptive such as recent changes to cookie security rules initiated by Google’s Chrome team are generally announced long in advance, so we have a window to react to them. We also have automated tooling built into our applications which alerts us to use of browser features that are planned for deprecation or may not work in all browsers as well as known security issues in our dependencies.

Can Kinetic access client files or devices? Like scanners or scales?

In Epicor 11 we will have a solution for local hardware access using an agent application you install on your local network that can access local hardware like printers, scanners, scales, etc. This feature is not specific to kinetic it’s a new erp server feature that will allow the erp server even if outside your network to use printers, scanners, etc. inside your network with your permission. This is required because web browsers intentionally do not provide access to local hardware without permission to protect your security and we do not want to require a browser plugin to use the software which would limit which browsers you could actually use.

How do I submit feedback on the Kinetic forms?

We want your feedback! We have introduced a new feedback link in 10.2.600 right from each Kinetic form. If you run into an issue, please submit a support call just like you would do for any other issue in the software.

How do I enter a support case related to an issue found in a Kinetic form?

When entering your case in EpicCare, set the Asset/Module to “ICE/Tools” and select “Kinetic” as the Category. This ensures the issue is routed to the correct team within support to help

Which Kinetic forms are currently available?

We are enabling Kinetic reports and processes incrementally. You can find the complete list of Kinetic enabled forms in the Kinetic Application Release List on EpicWeb on the Kinetic Resources page.

Epicor Application Studio Specific Questions

What kind of customizations can be built using App Studio?

- Customize Reports, Dashboards and Trackers; edit screens and bind data in the drag & drop Layout Designer
- Create conditional Rules to disable/enable hide/show, and highlight data
- Create custom event logic
- Embed Data Discovery Business Intelligence Objects
- Embed third-party applications and reusable components

Is there an automated migration path for my existing customizations?

No, old customizations will continue to work in the Classic Screens. In the future we will be working on methods and programs around migration of existing customizations.

How can I obtain documentation and/or help with Application Studio?

Epicor Application Studio's in-product dedicated help is available in 10.600.2 with additional content being continuously enhanced with each release.

How can I share feedback on Application Studio?

If you want to share your feedback on the Kinetic customization processes select “Preview Feedback” and a form will allow you to submit feedback directly to the engineering team to let us know what you like, don't like, and suggest improvements.

Are you able to preview a customization before it goes live into my environment?

Yes, while you are working on your customization, you can preview how it looks and functions based on your changes anytime in the process. Your new customizations will start in a draft state until you choose to publish them.

How does one gain access Epicor Application Studio?

A user of Epicor Application Studio must first have customization rights enabled for (the

Customize Privileges check box is selected in User Account Security Maintenance). Application Studio can be accessed from supported Kinetic screens by choosing the “Customization” option from the main overflow menu at the top right of the screen.

Is Application Studio a separate download?

Application Studio is an IDE meaning it is integrated in Epicor ERP and is a part of the core Kinetic Framework. It is accessed from within any Kinetic enabled screen that you are looking to configure and tailor.

What is the skillset required for of a user of Application Studio?

Application studio is a no-code Integrated Development Environment (IDE). While there is no coding involved, it is important to understand the various data relationships within Epicor ERP to effectively configure the system for your specific business requirement.

Are the configurations and personalizations built in Application Studio upgrade safe?

Yes, while it always recommended to test the Kinetic framework itself provides predictability that your changes will be safe during an upgrade.

Can a personalization in Kinetic be applied for everyone like a customization?

Yes, in order to give a personalization to others you would upgrade it to a layer in Application Studio. Then it can be added to the menu.

Are configurations made in Application Studio only available for Cloud and or On Premises Epicor ERP customers?

Configurations made to Epicor ERP are deployment model agnostic; they will function in both Cloud and On Premises.

Can you export a Kinetic customization and apply it to another Epicor environment?

Yes, you can do this in the Solution Workbench.

Is a layer the same thing as a customization?

Yes, think of them the same way. The difference being that you can add multiple layers together on a menu item to add functionality.

When mixing layers, could it be possible to have a conflict between the same field having rules? For example, Rule A is Red, and Rule B decided to use Green on a similar rule?

Yes, you need to test your combined layers to ensure they are behaving as you expect together. Conflicts between layers are solved with the basic principal of – the last layer wins. You choose what order they are applied in so which one wins is your choice.

For example, if you combine layer A and layer B and both of them move the same button to different locations on the screen you can combine the layers like:

Base, A, B – the button will be positioned where layer B placed it

Base, B, A – the button will be positioned where layer A placed it

With row rules like the example above they are seen as two separate things (not the same button edited by two layers but two rules created by two layers) so both the rule from A and the rule from B are going to run. Whichever one runs last is going to win if they both activate. This is again based on the principal of last layer applied wins so if it is Base, B, A then the rule from A is going to win and the item will be red.

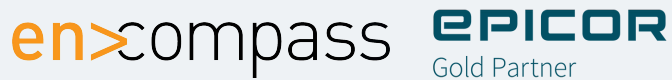
These are very simple examples and why it is important to actually test them together as you may end up with surprise behaviors in your combined application. For example imagine if layer A added automatic saving to a screen as you enter data and layer B added extra validation before save which prompts the user for a comment in a slide out panel. Combine them and now you have an application that prompts you for a comment every time you touch anything, different behavior than was intended. So you have to test your combinations and you may need to adjust them to work the way you expect when combined or just adjust the order the layers are combined in.

Can C# code be leveraged on the Client?

No, Kinetic does not support C# code on the Client.

Can we still use C# code in customizations? Will any C# coding in Kinetic customizations be possible?

No, currently you cannot use C#, JavaScript, or TypeScript code within Kinetic User Interface Customizations. In order to simplify customization for more users, provide a more predictable upgrade experience, and lower the size of our Kinetic Browser Application we are limiting coding capabilities within Application Studio and focusing on a no code experience in its initial releases. All of the core application screens being brought to Kinetic by Epicor Development today are developed without writing any C# using the same capabilities available in Application Studio. The one exception to this rule is Kinetic Configurator, coming in Epicor 11, where we will be allowing limited C# coding to support migration of existing configurators to Kinetic. That said you can leverage server-side customizations such as Epicor Functions to write custom code that runs on the server and use it from within your Kinetic UI Customization. So, if you have a need to write complex custom logic you can take this approach to integrate custom code into your Kinetic Application without having it running in the user's browser.



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