

Business Architecture

Business without Barriers

EPICOR®

Raise technology to a business level with productive tools for your enterprise.

Business Architecture

- Epicor ICE
- Epicor Everywhere Framework
- Information Worker
- Business Activity Query
- Epicor Portal
- Business Process Management and Workflow Management
- Web 2.0
- System Tools
- Service Connect



Epicor Business Architecture

Epicor has long been recognized as a leader in technology innovation, not just investing in technology for technologies sake, but in order to deliver far reaching business benefits to our customers businesses. Epicor understands that modern business software needs to be intuitive, compliant, and super productive to meet both existing and future needs. For more than five years now, Epicor has been designing and building enterprise business software built from the ground up using SOA standards.

Technology is the foundation which most businesses use to execute their objectives. At the same time, it is important that the technology does not overwhelm a business but operates seamlessly and effectively in the background. Today Epicor business architecture provides a rich user experience, affording opportunities for greater user collaboration and productivity. Offering new levels of extensibility and scalability, it is a technology asset that meets a company's requirements today, yet remains flexible enough to accommodate opportunities in the future. This unique blend of tools and technology constitute the business architecture we call Epicor Internet Component Environment (ICE).

Epicor ICE

Epicor ICE is the business architecture that underpins the Epicor enterprise business software and offers a true service oriented architecture, Epicor *True SOA*™. This agile business process enabling technology builds on an already complete and robust framework. The toolset is helping our customers to both use and enhance Epicor applications at a business as opposed to a technology level—with minimum overhead. Epicor ICE addresses the following key needs of modern enterprises:

Reliable

Downtime is very expensive and many companies now run 24x7x365. Although a company's employees may not be on the premises 24x7, many systems are up and running 24x7 to service the needs of global operations and their customers who can access the system via the Web or increasingly the Cloud. Cloud computing is a relatively new deployment method for business systems where hardware resources to run applications are shared and rented as needed in a "Cloud." Cloud computing ensures reliability and availability of resources for your most important business systems. Epicor ICE allows online backup and complete fail-safe options. Ensuring availability meets the most rigorous service-level agreements. It also supports corporate social responsibility initiatives in areas such as hardware and software virtualization, for more efficient environmental and energy management.

Scalable

Whether your business is at a single location or spans multiple sites around the world, Epicor offers scalable and easy to deploy solutions for simple to complex operations. In particular, for deployments requiring high end scalability, all business logic within Epicor applications is encapsulated within objects that are executed via application servers. These

in turn communicate with the database via data servers. An enterprise can utilize multiple application and data servers in order to deliver the required level of performance to the enterprise. Epicor ICE also allows an enterprise to split itself up on multiple servers that can be deployed around the globe—delivering maximum performance to the local company. However, a powerful messaging infrastructure ensures real-time collaboration of information for delivering the same control and data access as if the enterprise existed on one centralized server. This combination of technology delivers unrivaled scalability.

Agile

A service-oriented approach to enterprise software development ensures an abstraction of complexities in terms of how business systems are built and operated. In an SOA, business logic, that represents software processes is broken down into a series of loosely coupled granular "business services" which are then made available and discoverable on a network via Web services. Each service provides functionality that can be adapted to the needs of the enterprise while hiding the underlying implementation details. By exposing business processes, SOA provides the ability to streamline those business processes, which in turn promotes agile change management. Because business processes are broken down into smaller functions that can be accessed and manipulated, it becomes much easier to match your business rules to the processes in your business system.

Epicor *True SOA* goes a step further by considering both server business logic and client business logic as "business services." This delivers a technology resource that's not just built for change, but is designed for people. Epicor ICE reduces the cost and complexity of technology adoption by being completely ready for business.

Accessible

Epicor ICE introduces the Epicor Everywhere™ Framework for complete user interface and device control, including utilizing Microsoft .NET Windows smart client technology to provide users the most effective platform in order to maximize their environment. Historically a Windows client meant that applications could only be effectively operated over a local area network (LAN). Smart client technology allows users to connect to the application not only over a LAN, but over wide area networks (WAN). The Epicor Everywhere Framework stores client code as XML metadata so that it can be used to generate other user experiences and for any number of devices. For instance, your Epicor applications can be deployed as Web forms in almost any Internet browser or deployed to almost any mobile device. Epicor ICE also ensures that all application logic is exposed securely as Web services to allow users to connect with business logic via their chosen mechanism and to enable greater access from other applications and businesses.

Flexible

Epicor ICE allows companies the flexibility of choosing the technology stack that best supports its objectives. Epicor enterprise applications can be deployed on most major operating systems including Microsoft Windows, UNIX®, and Linux®, and also allows companies to deploy on multiple database platforms. Epicor ICE also provides flexibility for the client deployment with support for Windows forms, Web forms, and Mobile device forms. Additionally, Epicor ICE offers flexibility in deployment model with support for on-premise installation, external and co-location hosting and multi-tenancy software as a service (SaaS).

Customizable

Epicor ICE has a built-in customization engine based on Microsoft Visual Studio® .NET that allows companies and individual users to customize and personalize their environments without the need to alter existing source code, thus avoiding costly upgrade costs.

Epicor ICE uses a layered approach to customization. Customizations are held within the database, but in a separate layer, ensuring portability from release to release with minimal effort. At the base layer there are no customizations. Epicor Partners and end users can create industry specific customizations within the verticalization layer for streamlined deployment and utilization by those industries. Then, site specific customizations can be made in the customization layer and finally on top of site customizations, individual users can define their unique personalizations for optimum performance. As a software vendor, Epicor can continue to add functionality to the base without interfering with customizations executed on successive layers. This is called the Epicor Layered Client Stack. Furthermore, because Microsoft .NET has a “multilingual” compiler, these simultaneous customizations need not even be in the same language.

Also embedded into Epicor ICE business architecture is a comprehensive BPM platform. Epicor BPM allows users to build their own business rules into the application without the need to touch the base source code, avoiding costly upgrade issues.

Productive

Epicor enterprise business applications are delivered with a dedicated user experience—application forms that can be rendered either as smart client (C#) or Web client (AJAX). However, Epicor understands that to maximize user productivity, application capabilities need to be extended out to a broader community of users than those who typically spend their time within that dedicated experience. To that end, Epicor ICE also supports composite applications, typically delivered via Web Portals and immersive applications, where application logic is surfaced up within common office productivity tools, like Microsoft Office. This ensures that all users, no matter what their chosen tool may be, can be as productive as possible.

Also embedded into Epicor ICE business architecture are a series of Web 2.0 concepts that raise user productivity to the next level again, such as Enterprise Search for rapid access to relevant information and support for subscription technologies, like really simple syndication (RSS) that proactively push information to users.

Collaborative

One of the powerful benefits of a SOA is the potential for integration between different applications and business partners. By using XML as the format for sharing data, and simple object access protocol (SOAP) to communicate in a way that is programming language independent, it is possible to create Web services that talk to Web services built by other vendors, or that have been created internally. All Epicor functionality is available as Web services and can be connected to any other application, business or orchestration tool (e.g., Epicor Service Connect, Microsoft BizTalk® or Progress Sonic™ ESB).

Future Proof

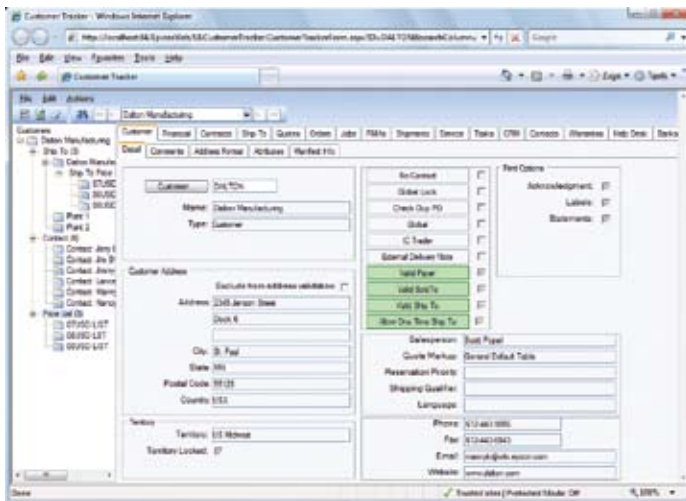
Epicor has a long history of introducing leading edge technology that delivers a competitive edge for its customers. Epicor ICE is based on Epicor *True SOA* and a platform of technology independence. This combination ensures not only a leading edge environment today, but an infrastructure that can evolve and adapt to the new technologies of tomorrow.

User Experience

Epicor ICE delivers user interface (UI) options that are at once easy to use, rich and intuitive, and give users choice in deployment and experience. Unique technology within Epicor ICE offers the ability to have multiple user interfaces interact with the same SOA-based business logic simultaneously including a “Smart Client,” a Web browser-based Client, or Microsoft Office applications. All UI options are intuitive, flexible, aesthetic, and promote user productivity.

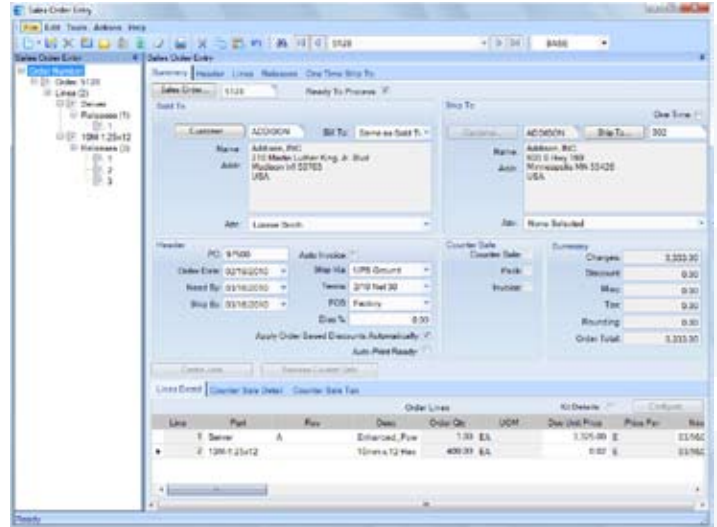
Epicor Everywhere Framework

Today many enterprise applications are being rewritten to support mobile devices and browser-based clients, which provide easier more convenient access to business information and easier deployment. These clients are generally considered “zero-footprint” or “thin” clients. Rather than rewriting our application forms to support mobile devices and the Web, we developed the Epicor Everywhere Framework, a unique technology that stores all client business logic as tagged XML metadata. This permits Epicor applications to run as smart clients or Web clients or on mobile devices, all from the same source code. This framework also ensures that user customizations and personalization remain intact, whatever the UI.



Epicor Everywhere provides a rich user experience over the Web.

For example, you can customize your smart client forms to meet your specific business needs and then simply re-generate the form's metadata and output it as a Web form with all customizations included. ICE delivers a new usability feature whereby a Web user has the option of switching to the Windows smart client for certain forms, thereby running a hybrid application designed to improve performance and user flexibility. In addition to this key feature, Epicor ICE introduces “Group By” and Personalization” functionality for Epicor Web Access forms similar to that found in the Windows client version.



Epicor Smart Client offers many rich usability features.

Epicor ICE supports generation of asynchronous JavaScript and extensible markup language (AJAX) Web browser-based forms from existing Windows forms (C#). For added flexibility Web forms can be accessed from different mobile devices and browsers, including Microsoft Internet Explorer®, Mozilla® Firefox® or Apple® Safari® and can run on any operating system, including Windows, UNIX, Linux, or Mac®.

Epicor Mobile Access

In Epicor ICE we have extended the Epicor Everywhere Framework™ to support mobile dashboards which are rendered as Web applications that may run on a number of mobile devices including BlackBerry® and iPhone™. Since the mobile dashboards that support Epicor Mobile Access are built using the dashboard technology and Updatable BAQ technology, it is simple to create Web applications that implement business functionality on mobile devices. Epicor 9.05 ships with sample mobile forms that can be copied, modified, and customized to meet specific business requirements.

Epicor Smart Client

Epicor takes full advantage of Microsoft's .NET smart client technology to deliver an easy to use, rich user experience in a traditional local client environment. Smart clients are easily deployed and managed client applications that offer users a powerful interactive experience—an experience that takes advantage of local resources to connect intelligently to distributed data sources. Business workers can take advantage of increased opportunities to extract, consume, analyze, and distribute information to help create new products, expand into new markets, streamline business procedures, and provide better operational control. The Epicor smart client delivers the rich functionality that users expect, including: tear off sheets; user sizeable screens; navigation trees; non-modal forms; publish and subscribe; advanced searches; drag and drop attachments; drill down navigation and exploration; and HTML online help and tutorials.

External Update Method Added to All Business Objects

An external update method (UpdateExt) is available on all transactional business objects to support bulk updates via integration engines such as Epicor Service Connect. This method implements the functionality previously incorporated in the Epicor Web Service Update method to accept a complete dataset containing hierarchical data and multiple records and to call the base Update method of each business object repeatedly for each row in the dataset and for all records in the dataset. Since all processing is conducted on the server within one login session, the use of this method eliminates much of the latency within the Web services and improves performance for bulk updates.

Styling and Themes

Styling offers complete control over the look and feel of the entire user interface. It works by letting you define the look of each item within the interface—buttons, check boxes, fields, etc. Because themes can be deployed for a company or plant, multi-plant and multi-company deployments can set their unique theme for easy recognition and brand loyalty.

Information Worker

According to current industry surveys, desktop productivity tools are used by 95% of business workers, with Microsoft Office as the standard for desktop applications. Epicor Information Worker provides a secure, seamless interface to your Epicor application from within Microsoft Outlook, Microsoft Excel, or Microsoft Word, blurring the lines between enterprise software and desktop productivity software to create a single immersive solution. Imagine the productivity and business visibility you will gain by using Epicor Information Worker as an interface for both traditional and non-traditional Epicor users.

With changes in ICE, the underlying architecture provides direct access to Updatable BAQs. Information Worker also is able to call Epicor Web Access forms as well as smart client forms from the Information Worker menus.

Extend the Reach of Epicor Applications

Many business workers simply don't need to utilize all the powerful features of your Epicor applications, but they do need access to the data. Epicor Information Worker allows authorized users to retrieve, view, and modify Epicor data. Epicor application licenses are utilized efficiently—minimizing the licensing impact on your organization and easily allowing more users access to your Epicor solution.

Work in Context, Online, and Offline

With Epicor Information Worker, you no longer have to leave what you are currently doing to get the data you need. Simply download the data directly into your Microsoft Office application. With a few clicks of the mouse, add Epicor contacts, tasks, calendar items, and other data into your Microsoft Outlook lists. Outgoing and incoming customer emails can be automatically logged as calls. Customer, supply chain, manufacturing, and customer relationship management (CRM) data are all available online or offline.

Support Your Customer Relationship Initiatives

Epicor Information Worker can help you exceed your customers' expectations. Your customers will be impressed with how well everyone in your organization knows the details of their account anywhere, anytime. Your sales organization, customer service workers and business executives—everyone in the company—can easily retrieve and update information within Microsoft Office while at work or on the road. The powerful combination of Microsoft Outlook, Word, Excel, and your Epicor data empowers all business workers to offer informed and responsive customer service, which translates to higher customer satisfaction.

Business Activity Query

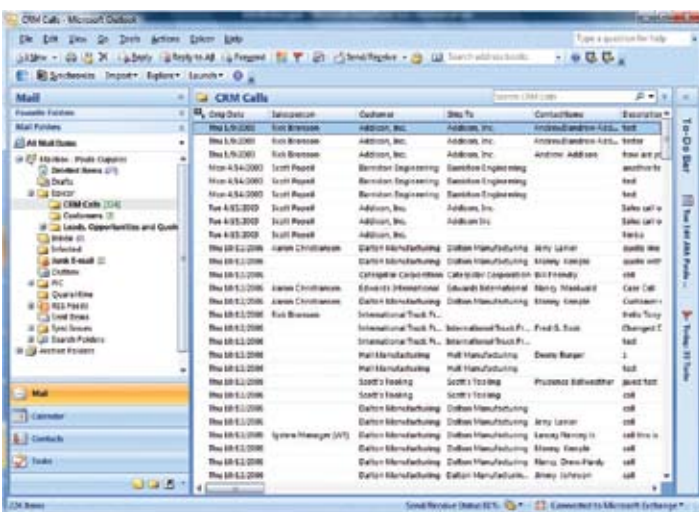
Every business needs an intuitive and easy to use query engine, and for this Epicor created business activity query (BAQ), which allows you to create personalized queries or to copy standard queries. Once the query is created, it can be used throughout the application—to generate Crystal Reports, for quick searches, to support Portal views, or to view results in a Dashboard. Epicor BAQ lets you create queries that display the data you need, when you need it.

Easy to Use Wizards

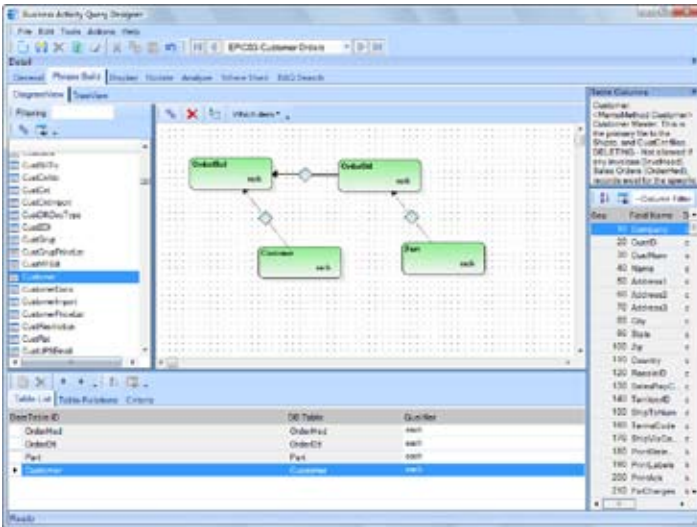
The BAQ Designer includes easy to use wizards to help you define your query—or you can create the query free-form. The BAQ can be accessed from various parts of the application.

Graphical Links

A graphical display for table links.



Epicor Information Worker lets you view, modify, and update business data from within familiar Microsoft Office applications.



The BAQ Designer provides many easy to use features for creating business queries.

Use of Temp Tables and Variables

BAQ includes the ability to use temp tables and variables in your query. This is especially useful for BPM.

Calculations

Embed calculations within query data for rapid reporting and use throughout.

Views of Data

Create multiple views of standard system information for rapid reporting and dashboard generation. Also, allow multiple instances of a single table.

Easily Analyze and Test Your Query

In addition to providing a visual presentation of the query being created, the BAQ designer also provides tabs where you can analyze, test the syntax, and run the query to confirm the query is correct before it goes into production. There is also a tab to display where an existing query is being used—dashboard, quick search, or dynamic report. The BAQ designer provides all the tools you need to quickly and easily create queries that return the relevant data you need.

Updatable BAQ's

Our ICE platform and the BAQ designer has been extended to support updatable Business Activity Queries (UBAQs). The query designer supports both the ability to update the database via the new External Update method or, to update via a BPM directive which in turn may call a Service Connect workflow for complex updates. In either case the update is performed through the framework business objects thus protecting the integrity of the data. The UBAQ is supported in both dashboards and in the Mobile framework. UBAQs are enabled for a user via User Maintenance as "Advanced BAQ Designer."

Dashboard Applications

The Dashboard designer provides a standardized user experience and supports UBAQs. While the dashboard designer can run dashboards in interpreted mode, UBAQs are only available when the dashboard is deployed as an application or as a mobile dashboard. When configured with UBAQs, the dashboard behaves in much the same way as a delivered Epicor form thus allowing the user to construct dashboard applications that streamline the business process.

Epicor Portal

It is essential to have current enterprise data at your fingertips to make the decisions that drive your business to success. But sometimes important business decisions need to be put on hold because you have to wait for someone else to get you the data you need to make those important decisions. Epicor Portal can help by providing the framework and tools that allow you to gather and share enterprise data without having to depend on others. With Epicor Portal, you can get the information you need from your enterprise system when you need it, without having to wait in line.

Reduced IT Burden, Secure Data Access

Epicor Portal moves the function of gathering and publishing data out of the hands of IT and into the organization for easier collaboration and knowledge sharing. By leveraging Microsoft SharePoint products and technologies, the industry-leading portal infrastructure, Epicor Portal is able to provide the rapid deployment of a secure and collaborative portal environment that reaches across the enterprise. Epicor Portal provides a management console where roles and security settings are maintained. You determine exactly what your portal users can do by creating specific security settings for every Epicor Portal content consumer or group.

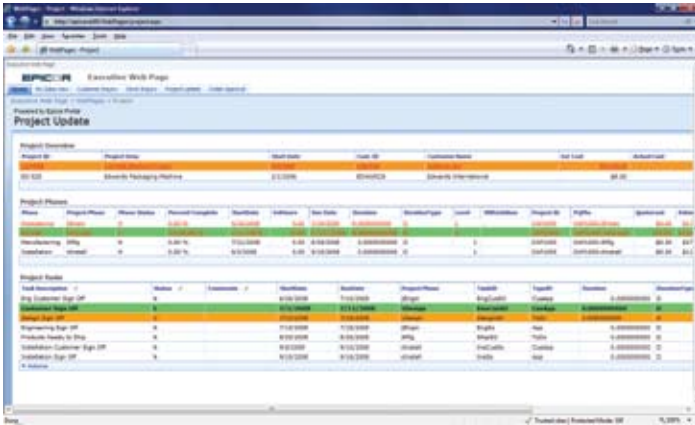
Ease of Use

Epicor Portal includes the Epicor Administration Console which is used for specifying data sources and maintaining roles and security settings and the Epicor Portal Explorer, an easy-to-use data visualization tool which allows end users to intuitively create data views without any knowledge of the underlying database or querying language. The Epicor Portal Explorer is a personalized work space to build, edit, preview, and export data views. Epicor Portal Explorer runs within Microsoft Internet Explorer and can be accessed from any computer that can connect to the Portal server.

Improve Collaboration and Increase Productivity

Epicor Portal allows you to build specific content within a portal and make that content available for use throughout your organization. The ability to provide this level of information access will boost productivity and improve collaboration between your people, departments, and divisions. Additionally, Epicor Portal can provide secured enterprise data access to outside entities such as partners, suppliers, and customers for added visibility and business opportunities.

Once Epicor Portal views have been created, they can be published as Microsoft SharePoint Web parts for use by any qualified user. Users are able to access business data either through the Epicor Portal Explorer or Microsoft SharePoint. Data discovery and visualization within Microsoft SharePoint empowers information workers and other stakeholders to build and share business data and events in addition to performing ad hoc online queries.



Epicor Portal provides rich, compelling content to promote collaboration between employees, customers, or suppliers.

Integration with Sharepoint Business Data Catalog

Integration with SharePoint Business Data Catalog enables Office SharePoint Server 2007 to surface business data from back-end server applications without any coding. Business Data Catalog bridges the gap between the portal site and your business applications and enables you to bring in key data from various business applications to Office SharePoint Server 2007 lists, Web Parts, search, user profiles, and custom applications.

Take Action Immediately

Epicor Portal allows you to do much more than simply view your business data—it allows you to take action. With Epicor Portal, you may create views that allow users to create new or update existing business data without having to open the application. For example, you might want to allow your customers to create an order that will go directly to the ERP system without anyone else touching it. This acceleration of information delivery-decision-action process can improve the responsiveness and performance of an entire organization.

Unified View of Your Organization

Epicor Portal enables transparent and secure interaction with Epicor applications throughout the organization. Additionally, non-Epicor data sources can be incorporated into security and data discovery wizards to provide an integrated view of your business.

Epicor Portal Customer Content Pack

Improve business efficiency by extending traditional boundaries for doing business with customers. The Epicor Portal Customer Content Pack provides interactive customer facing content that supports strategic goals for improved customer communication and direct collaboration on day to day business, right from your Web site. Additionally, customers enjoy 24x7 self-service and can access, review, and make online requests for quotations. The Epicor Portal Customer Content Pack is designed to deliver the information your customers are looking for; open and closed orders, shipments, RMAs, invoices, credit memos, payment history, service calls and more.

Customers are becoming more demanding for information. Use Epicor Portal's flexible environment for further defining the content to which customers have access and securing it based on the customer and what you want them to see. Customer-focused businesses can provide the details customers are looking for without taxing internal customer service resources. With Epicor Portal, your customers can drill into the details to which you give them access.

For companies looking to take new opportunities electronically, customers can submit request for quotes with quote details electronically. Behind the scenes, your Epicor solution will accept these details and automatically generate a quote with appropriate tasks and follow ups to complete. Your Epicor solution is updated the same as if someone was sitting in your office entered the new quote, including business specific quoting workflows, approvals, and automated e-mail communication.

Epicor Portal Supplier Content Pack

Improve business efficiency by extending traditional boundaries for doing business with suppliers. The Epicor Portal Supplier Content Pack provides interactive supplier facing content that supports strategic goals for improved supplier communication and direct collaboration on day to day business, right from your Web site. Suppliers enjoy 24x7 self-service and can access, review, approve purchase orders and changes and submit pricing in response to RFQs.

Real Time Collaboration with Suppliers

The Epicor Portal Supplier Content Pack is designed to provide real time collaboration with suppliers on current business and drive new efficiencies and performance in your supplier network. Communicating electronically and in real time with suppliers reduces lead times and improves responsiveness to customer's demands. Suppliers can approve and reject purchase orders and purchase order changes electronically as well as respond to new pricing requests. Behind the scenes, your Epicor solution automatically responds to supplier input, improving buyer response to estimators request for quotations, and more.

Secure Content Delivery

Suppliers have the information they need, when they need it; freeing up your buyers to do more important things than making phone calls when purchase orders become late and answering supplier questions about delivery, payment and more. Use Epicor Portal's flexible environment to define the content access and securing it based on the supplier and what you want them to see. With Epicor Portal and the Epicor Portal Supplier Content Pack, your suppliers can drill only into the details to which you give them access.

Business Process Management and Workflow Management

Epicor takes into account the real-life circumstances that define your complex and dynamic business environment, both during planning and the actual process. Embedded within Epicor applications is a comprehensive and flexible workflow solution that gives you the tools you need to respond quickly to critical business requirements. The workflow facilities available within Epicor enable you to quickly begin managing and automating even the most complex business processes, including working toward ISO certification. Epicor Workflow Management is comprised of five major components: Task Management; Workbench Views; Business Activity Management (BAM); and Business Process Management (BPM).

Task Management

Systematically automate and execute routine processes using a set of tools provided by Epicor. The inherent systematic nature of processing tasks via these tools contributes to the speed, consistency, accuracy, and ability to document procedures for regulatory compliance.

Multi- and Single-Tiered Task Management

Define workflow processes which key transactions must follow for completion. Tasks may be a single step process, or they may be a series of interlinked processes involving many different parties. Create custom workflows specific to your business using task sets. Task sets may define a single step process or a series of interlinked processes involving many different resources. Task sets can contain Multilevel tasks, milestones, mandatory tasks, and alternative routes.

Task Definition

Define tasks to accurately represent the work to be done within your enterprise. Tasks can be created on-the-fly, or users can select from predefined tasks (e.g., pricing approval, revision update, generate quote) to identify different types of work to be completed. After creating a task, you can assign it to the appropriate employee.

Electronic Sign-Offs

Optionally require password clearance for sign-off on key tasks, providing traceability and adherence to procedures. Task sets ensure that transactions can only be updated if the task set is at the right status.

Streamline

Categorize tasks by type, streamlining assignment and task set generation. Task types are user-defined (e.g., to-do, urgent item, follow-up) and simplify categorization of work.

Task Lists

Specify task lists to each employee, and automatically deliver them to the area where the work needs to be done.

Message Log

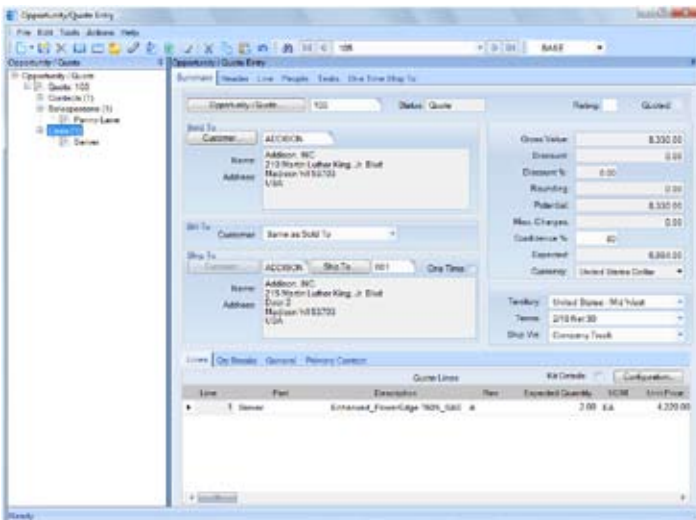
Document e-mails and calls regarding the task with a message log.

Automatic Assignment and Routing of Work

Automatically assign tasks using required resources and the context of the transaction. Dynamically assign task sets based on circumstances. The task management system will automatically assign and route the work needed to process the change.

Staying Up-to-Date

Choose to have Epicor automatically send an e-mail notifying key personnel when a task has been created or completed.



BPM tools allow you to fit the Epicor business software to fit your business requirements.

Send Alert

Automatically and immediately send an e-mail alerting internal or external resources when key areas of the system are changed. E-mails can be automatically constructed by Epicor, or you can construct sophisticated HTML-based e-mail messages.

Carry Out Processes

When critical information has changed, automatically carry out processes to update other parts of the system.

Workbench Views

Epicor provides a series of role based workbenches to streamline and expedite workflows throughout your company. Workbenches provide a focused, paperless, single entry point from which internal and external users can automate and execute routine processes. Epicor comes with many predefined workbenches including buyers, planning, engineering, inspection, service, sales, credit manager, and plant workbenches.

Business Activity Management

Epicor extends Workflow Management with integral business activity management (BAM). BAM enables you to build simple proactive business rules into any of your system transactions and has four major components:

Change Log

Identify key data areas to track including who, what and when data has been changed.

Alerts

Immediately send an e-mail alerting internal or external personnel when key transactions have been changed. E-mails can be automatically created or you can design sophisticated HTML-based e-mail messages using related information from your database. You can specify e-mail addresses manually, use scripts to identify e-mails based on rules, or automatically derive e-mail addresses based on transaction-specific information.

Execute Processes

Automatically execute a process to update other parts of the system when a key transaction has changed.

Manage Exceptions

Easily activate alerts, enabling you to immediately begin gaining control of potentially expensive exceptions. Epicor includes a library of predefined alerts ranging from "customer credit hold flag changed" to "employee clocked out early."

Business Process Management (BPM)

Building on and extending beyond the simple rules enforced by BAM, Epicor Business Process Management is all about identifying and improving processes to make your business more efficient, more disciplined, and better able to adapt to change. Epicor incorporates BPM technology to enable organizations to automate and streamline business processes for continuous improvement. Epicor BPM augments your current efforts of continuous improvement by allowing you to more closely tailor your Epicor solution to reflect the best practices you have developed.

Seamless Integration and Workflow Capabilities

When coupled with Epicor Service Connect, Epicor BPM gives Epicor customers seamless integration capabilities with any service driven application. Epicor BPM automates delivery of information to customers and suppliers directly from within the Epicor application. As an integral part of the Epicor business architecture, Epicor BPM provides a layer to each Epicor service for applying rules and conditions whether the service is called from a client, another service, or another program. Epicor BPM includes the ability to track data changes within the database and automatically send alerts or print reports when change events occur.

Easy-to-Use Wizard Interface

Epicor BPM provides a Microsoft Outlook style rules wizard so you can easily intercept Web service methods with Method Directives and add custom logic to perform actions before, after, or in place of a Web service method. Every Method Directive is executed as though it were part of the standard code itself. Epicor BPM will allow the simultaneous update of changed rows to support new BPM method directives and to improve processing performance.

Pre-Process

Epicor BPM allows you to build pre-process conditions that require approvals or other conditions to be met before processing continues. For example: require approval for customer credit limit change.

Post Process

With Epicor BPM you can automate post process routines such as an Epicor Service Connect workflow that provides integration to an outside system, send an e-mail, invoke a .NET method, execute code, or create a record such as a workflow task.

Base Process

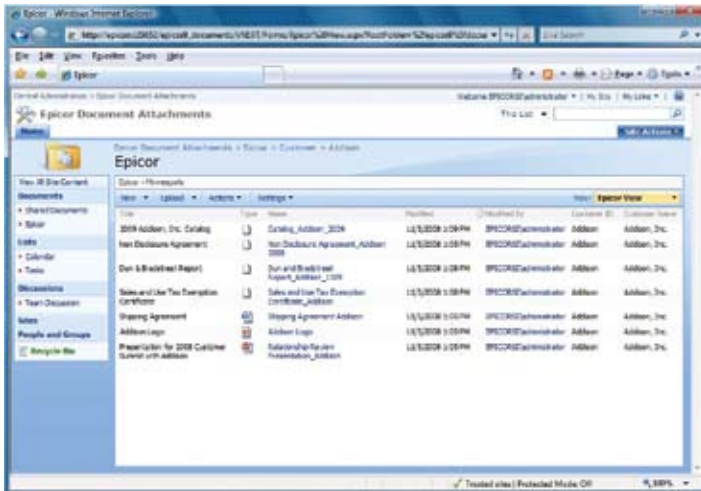
Epicor BPM also lets you replace an existing business service with your own.

Web 2.0

Epicor understands the value that mass participation and collaboration, with the Web as an enabler, can bring to business. Substantial advances and the ongoing maturity of the consumer Web have brought new levels of productivity and self-evident usability to today's technology consumers. Even the rise in social computing and related technologies has an outlet in enterprise business software, and are manifested in capabilities such as enterprise search and presence. Epicor ICE merges these emerging technologies, often referred to as Web 2.0 with Epicor *True SOA* to deliver unprecedented support for harnessing knowledge, rapidly finding information, and taking collaborative actions upon it.

Enterprise Content Management

Enterprise content management (ECM) supports paperless operations and reduces document control costs by enabling users to easily add documents and retrieve information from nearly everywhere within the system. Epicor ECM delivers essential attachment/document management capabilities by extending them to include use of Microsoft SharePoint (Microsoft SQL Server) document repositories. This means that document versioning is also supported along with the option to integrate to other best-of-breed document management systems.



Streamline document control with an integrated Microsoft SharePoint repository.

Drag and Drop Attachments

Epicor supports drag and drop document attachments, document versioning, and advanced document meta-data tracking and searches through attachment vaulting in Microsoft SharePoint. The electronic document is not stored anywhere in the system; just the file location is stored and linked to the business object used in the form. Multiple content management storage options are supported including; SharePoint Document (documents stored in a SharePoint document list), File System Document (documents stored in a defined file system location), Attachment Link (specific document link to a file location), and Collaboration Link (specific link to a SharePoint Document List).

Simple and Secure

Simply drag and drop a document from your secure document repository and the system generates a secure link that can be accessed based on user network security.

Retrieval

Retrieve documents for viewing, editing, or printing by contextually searching within your Epicor application and accessing related attachments.

Document Viewing

Epicor ECM offers support for industry leading AutoVue™ 2D Professional Desktop Edition and AutoVue 3D Professional Desktop Edition for viewing of hundreds of file formats. These include technical document types such as 2D/3D CAD and Electronic Design Automation (EDA), as well as business documents such as Office and Graphics. These solutions also include redlining capabilities.

Product Documentation Workflow

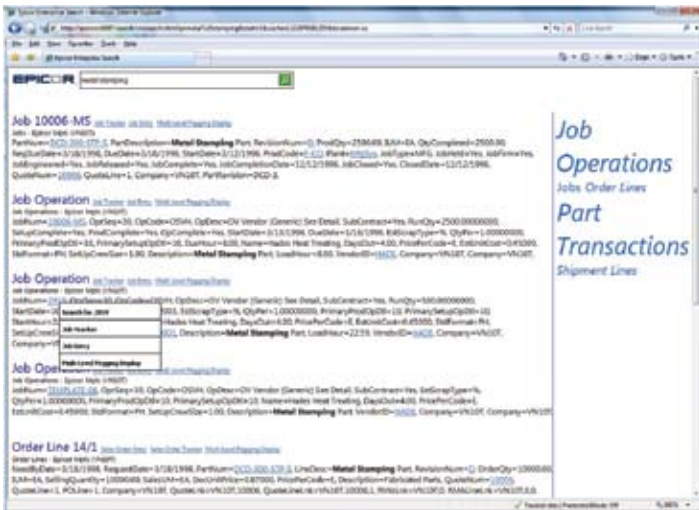
Automated product documentation workflow ensures the flow of accurate product documents to the production floor for viewing, redlining, and updating of drawings and other documentation related to the product, process, or material used.

Enterprise Search

Today's business workers are typically savvy internet users in their personal lives and have come to expect the same sort of access and community in their business lives. By utilizing Web 2.0 technologies and the building blocks of Microsoft Search, such as SQL Full Text Indexing, Epicor delivers Enterprise Search, a Google like search tool that brings the personal Internet experience to the workplace. Enterprise Search provides embedded search capabilities through tag clouds of Epicor structured data that span all Epicor applications built upon it and extends beyond enterprise data, to un-structured data (Word documents, etc.) if desired, and in a secure manner. Epicor Enterprise Search also supports extensible actions from search results including task specific actions, internal and external Web service calls and direct links to applications or application forms in context.

Secure Search Results

Business workers will be able to search data that resides within the Epicor application as well as data stored locally, on the network, or on the internet. Application data search results are returned to workers based on access rights—if a user is not permitted to view certain data, it will not be listed in the results. Search results are bound to the BAQ security rules—if a user does not have access to columns, they are not displayed for that user.



Epicor Enterprise Search delivers search options for relevant business information in a format similar to Google™.

Easily Find Relevant Business Data

With Enterprise Search, business workers are no longer tied to traditional ways of accessing information—now they can specify exactly what they are looking for and pick and choose from the result set to see the data. Enterprise Search will also include the ability to “drill down” into related data. For example, if you search for a customer, you will be able to see results that drill down into sales orders, invoices, payments, or CRM calls, to name a few.

Get the Information You Need Right from Your Browser

With Enterprise Search, users get the information they need with less input and without having to move from form to form within the application. Enterprise Search allows you to set the sensitivity level so you don’t get irrelevant data.

Enterprise Data Without Utilizing an Application License

With Enterprise Search you get fast, relevant and secure access to all of your information, without utilizing a license. Enterprise Search brings relevant business information to employees and customers in a familiar and easy-to-use setting.

Search Administration and management

Configuration of Enterprise search and of the BAQs that populate the search is available in the Epicor Administration Console allowing much easier system configuration.

Subscription Services

Epicor ICE extends RSS subscription capabilities to Epicor application data. This means that business users may subscribe to specific information that they wish to be kept apprised of. One area where this is enabled is within Epicor Portal, where the entire schema of Epicor applications is accessed for end-user query development and Web deployment. By subscribing to a particular query using RSS, users will see information proactively pushed to them when the data behind that query changes. For example, a user may wish to attach an RSS feed to a particular contact at a customer site. Any time something happens to that contact they can receive a note about it. RSS information can be pushed to your container of choice including the RSS Feeds Outlook Syndicated Content (RSS) Directory within Microsoft Office or via Windows Gadgets.

Composite Applications

Enabled by the Epicor Everywhere Framework, Epicor application Web forms generated from XML metadata, and their related linked business logic, can be used in composite application development. Each Web form supports publication and subscription, allowing specific business functionality to be “mashed-up” with other line of business developments.

Epicor Portal Mashups

Within Microsoft Office SharePoint Server it is possible to build composite applications that combine various connected Web Parts, such as Epicor Web forms, Epicor Portal Web queries, Epicor EPM analytical Web parts, and more.

Mobile

Enabled by the Epicor Everywhere Framework, Epicor application Web forms generated from XML metadata, and their related linked business logic, can be accessed via mobile device. Additionally, Epicor EPM KPIs can also be deployed direct to mobile devices and include full search capabilities to rapidly find and drill-down to applicable data.

System Tools

Epicor ICE offers a series of system facilities and tools to enable the effective management of Epicor applications, extending to system security, document management, advanced software development, software deployment, and product documentation.

Centralized Administration Console

This feature delivers a single management area for your Epicor system, which removes redundancy and in so doing boosts user productivity, accuracy and efficiency.

System Monitor

Schedule tasks to be run in the background on a one-off or regular basis (e.g., daily, weekly, monthly, etc.). Tasks can be jobs such as MRP or reports and forms. Reports and forms can be frozen at a point in time so the data can be referenced at a future time.

Integrated E-mail

Automatically e-mail employees, suppliers, customers, and partners from the system based on key actions. Attach documents so the recipient need only click on the attachment to drill into the associated transaction.

Separation of Epicor ICE from Epicor Applications

Epicor ICE business architecture is developed separately from Epicor enterprise business applications, allowing each to be modified and updated in separation and potentially under differing release cycles. Epicor ICE framework components have been extracted from application source control and given their own build and delivery schedules resulting in a more robust application development environment that allows staged delivery of Epicor ICE to application developers using the Epicor ICE software development kit (SDK).

Multiple System Agents

ICE gives the ability to run Multiple System Agents. This feature allows customers to set up multiple defined areas for generation of reports and processes. Application servers can now be located on many different physical servers to distribute the processing load, or remain on just a single physical server. Multiple System Agents also allows for greater flexibility in system tuning and security configurations. Epicor also provides the ability to execute reports on alternate databases. A System Agent can be expanded to have connection information for alternate database servers. This allows a user to log in once to a company and run reports using data from an alternate reporting database, thereby offloading reporting overhead from the main transactional database.

Extended Reporting Framework

The reporting framework within Epicor ICE allows optional Server based printing. This is done via the creation of an Enterprise (or Server based) printing option for users who wish to leverage the associated Crystal Reports, Microsoft SQL Server Reporting Services (SSRS) or other enterprise reporting software.

Epicor's server-based reporting option includes Microsoft's SQL Server Reporting Services (SSRS). SSRS reports add the capability to e-mail and fax reports in addition to printing from the server or previewing on the client.

Customizable Printed Forms

Access the laser-generated and preprinted customizable continuous forms that are provided with auto-fax and e-mail capability.

Auto Print Control

This feature handles the automatic printing of forms and barcode labels upon the completion of a predetermined list of Epicor transactions. Auto print control lets you define the events that trigger the printing, rules that define the conditions, and the action to take on a form-by-form basis.

Advanced Print Management

Automate document delivery with Advanced Print Management. Whether e-mailing, faxing, or printing and mailing.

Support for Multiversion Environments

The Epicor ICE framework now provides the ability to define and manage certain master data elements and processes across an environment that includes multiple versions of Epicor solutions.

Security

Multicompany Menu

This feature provides secure access to multiple companies without having to close all forms or carry out different logins when switching companies.

Operating System Security

Epicor ICE provides the option for Microsoft Windows Authentication and Windows Single Sign-on and Password Policy.

Method Security

Secure the types of processing users are able to carry out (e.g., allow a user to update an existing part but not add a new part) by user or group.

Data Level Security

Secure which data users are allowed to access. This can be done at a dataset (e.g., all sales order information), data table (e.g., sales order header information) or field level (e.g., sales order due date).

Security Reporting

More closely manage user security with security reporting.

Online Edits and Audits

Monitor all changes to records (before and after values), who made those changes, and when those changes were made. Prompt users for audit notes of why changes have been made.

Date and Time (Using Server Time) and User Name for Auditing

Epicor ICE introduces a true date time field which involves the creation of a Microsoft SQL Server style date/time data type or data control that can then be used by application developers to easily render local time. All date fields are of this date/time data type and are only stored in universal date format.

Epicor Documentation and Content Delivery

Epicor offers an approach to documentation and content delivery that puts relevant, context driven information in the hands of stakeholders and end users. This comprehensive solution set shortens your return on investment while maximizing utilization of your investment in Epicor.

Epicor deploys a worldwide team of dedicated content writers and trainers to bring together the feature summary, online help, technical reference user guides, online training courses, and online tutorials through a single-source technology.

XML-based Content Delivery

Built on XML DITA technologies, the team pulls information from a unified content library to create deliverables with consistent tone and structure. Creation of deliverables is more efficient, as one writer can seamlessly reuse content generated by another writer, making creation of deliverables more efficient and thus provide cost savings for both creation and translation.

Feature Summary

Understand the impact of updates to every line of the business. Feature summaries provide comprehensive role based help that explains business cases alongside impact topics for rapid adoption of new releases.

Online Help/Field Help

Comprehensive online help that is tied to the application function they are using reduces frustration from users and optimizes performance.

Intuitive Field Level Help

Epicor ICE offers a “quick” viewer to display Field Level Help embedded in a Sheet but available to be docked or torn off as an independent window. If docked, then help can be setup with a pinned or un-pinned capability that allows it to slide out /slide back when the sheet is activated. The quick viewer also supports Links and provides Rich Text functionality (colors, variable fonts, bold, italics, etc.).

Customizable Help

Users have the option to display help for a specific field where field definitions, field specifications, or both can be added. Epicor ICE provides a “help property” for each control available in UI customization. When field level help is requested, the text in the Help property is added or merged into the standard field level help prior to display. This also allows text to be run through standard translation logic before being merged into standard help, enabling customers and partners to create multi-lingual field level help.

Layered Help

This feature also allows help to be customized and modified by partners and end user customers. Help customizations are “layered” in much the same way that UI customizations are layered. Epicor Help content is used as the base and then can be amended by a partner (or Epicor Custom Programming) using the verticalization or productization layers of the Epicor Layered Client Stack, which can then be further updated by the end customer.

User Guides

Epicor User Guides provides a complete overview of the major functions within Epicor. These printable documents offer full color explanations of system functions and walk users through the system, step-by-step. In addition to an application user guide, there are guides on Epicor Business Architecture, Epicor Business Architecture user experience and customization, and Epicor Service Connect.

Technical Reference Guides

The Technical Reference Guides provide detailed instructions focusing on technical audiences. Epicor offers technical reference guides on scheduling, MRP, product configurator, job costing, and the posting engine.

Embedded Courses

Courses are embedded within the Epicor application to simplify role based learning and optimize deployment.

Customization Toolkit

The Customization Toolkit allows users to leverage standard content by editing according to their business processes. Users can add annotations to topics on the same tab as the help content. Course content can also be made available for larger deployments with advanced customization requirements.



Epicor provides extensive educational materials including printed user guides.

About Epicor

Epicor Software is a global leader delivering business software solutions to the manufacturing, distribution, retail, hospitality and services industries. With 20,000 customers in over 150 countries, Epicor provides integrated enterprise resource planning (ERP), customer relationship management (CRM), supply chain management (SCM) and enterprise retail software solutions that enable companies to drive increased efficiency and improve profitability. Founded in 1984, Epicor takes pride in more than 25 years of technology innovation delivering business solutions that provide the scalability and flexibility businesses need to build competitive advantage. Epicor provides a comprehensive range of services with a single point of accountability that promotes rapid return on investment and low total cost of ownership, whether operating business on a local, regional or global scale. The Company's worldwide headquarters are located in Irvine, California with offices and affiliates around the world. For more information, visit www.epicor.com.

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