

Business Architecture

Business without Barriers

EPICOR®

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

Business Architecture

- Epicor ICE
- User Experience
- Business Process Management and Workflow Management
- Web 2.0
- System Tools



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 service-oriented architecture (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 (SOA), 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 business process management (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#.NET) 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 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 Sonic ESB).

Future Proof

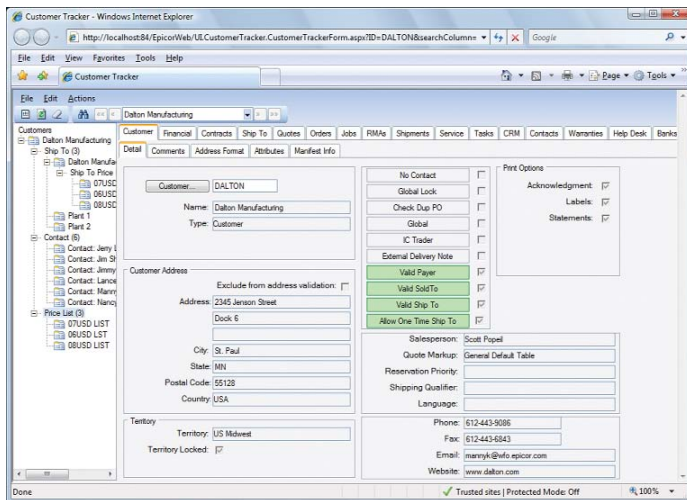
Epicor has a long history of introducing leading edge technology that delivers a competitive edge for its customers. Epicor ICE is based on Epicor *True SOA* and a platform of technology independence. This combination ensures not only a leading edge environment today, but an infrastructure that can evolve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

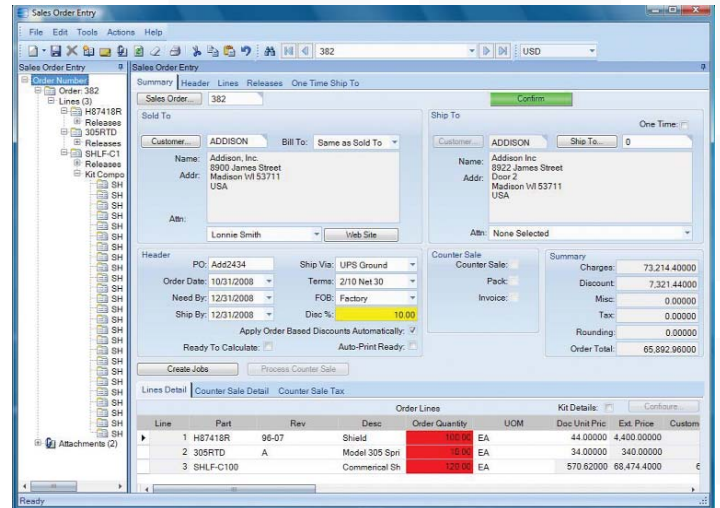
Epicor Everywhere Framework

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



Epicor Smart Client offers many rich usability features.

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.

Unlimited Comments

Enter unlimited comments throughout the system.

Keyboard Shortcuts

Personalize keyboard shortcuts for all functions.

Tool Tips

Provides for user controlled (on or off) fly-over text-based tool tips.

Indication of Attachments, Memos, Audits, Etc.

This feature makes it visible to users when memos or attachments are present.

Open With

Simplify navigation throughout the system with “open with.” Right-click on any field to highlight all related areas of the system that can be accessed. Powerful publish and subscribe technology automatically associates all open forms together. Changes in one form affect the information the subscribing forms show.

User-Defined Searches

Define your own searches in all parts of the system. Search criteria can be saved and reused in the future. Auto-load searches can be applied to forms so the search is automatically applied when the form is opened. Auto-search can be applied so that when a form is opened, the search screen is automatically opened.

Cut-and-Paste

Cut-and-paste information to and from all areas of the system and other applications (e.g., rows can be cut and pasted to and from Microsoft Excel®).

Transaction Visualization

View all transactions within a user-defined tree structure, allowing users to pinpoint information even in the largest of transactions.

Form Worksets and Navigation

Select multiple records to work with during a session. Move forward and backward within the set. Go straight to a particular record. Save to work with it later or e-mail to a colleague to process.

Advanced Grid Management

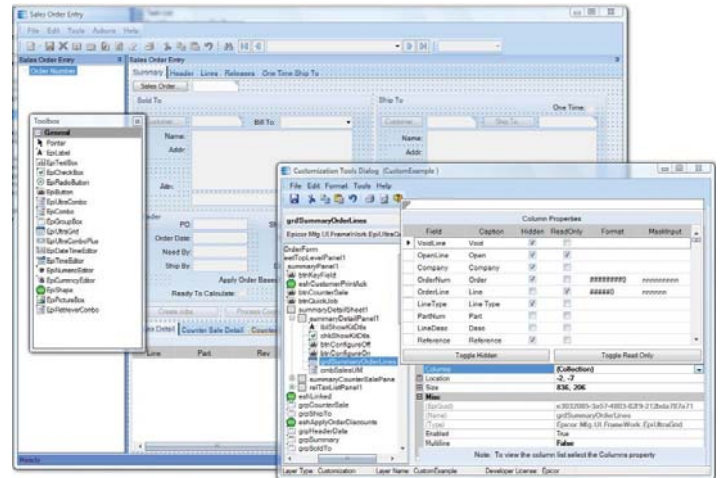
Freeze multiple areas of a grid vertically or horizontally so multiple areas of a grid can be seen simultaneously. Multi-tiered “group-by” functionality quickly makes sense of large amounts of data. Sort multiple grid columns.

Personalization

Personalize the way in which all forms look for users; how many forms are viewable; tab order; fonts; colors; menu shortcuts; tree view; hide panels; change grid orders; interaction dialogs (e.g., suppressing alert questions like, “Are you sure you want to delete this record?”).

Customization

Do everything available in personalization. The customization engine is based on Visual Studio .NET. Build multiple versions of forms; add user fields; add user logic; add sheets; add VB.NET code; hide fields; make fields mandatory. Layered customizations ensure no impact on upgrades.



Embedded tools allow you to personalize and customize forms to meet your processing preferences.

Customization Wizard

Customization wizards are available to streamline the use of the customization and personalization engine. This ability allows “visual behavior” for a field or set of fields and can be extended to include the setting of behaviors for fields in any defined view based on complex comparisons.

Localization

Localization refers to the fact that Epicor is designed for global-ready applications. Epicor utilizes Microsoft’s standard transactional format assemblies to ensure that resources that require localization and translation have been separated from the rest of the application’s code so that source code need not be modified during localization. To enable this, the Epicor ICE customization engine has been extended to include a separate localization layer. Creating a separate framework localization layer makes version migration easier for customers and localization partners and provides an area within the framework and application for the development of local add-ons which go beyond the needs of the base application.

Styling and Themes

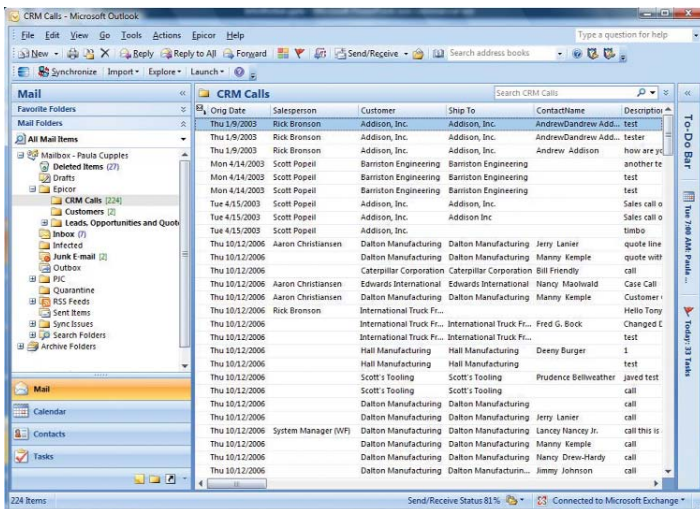
Styling offers complete control over the look and feel of the entire user interface. It works by letting you define the look of each item within the interface—buttons, check boxes, fields, etc. Because themes can be deployed for a company or plant, multi-plant and multi-company deployments can set their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

Epicor 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.

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.



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

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 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

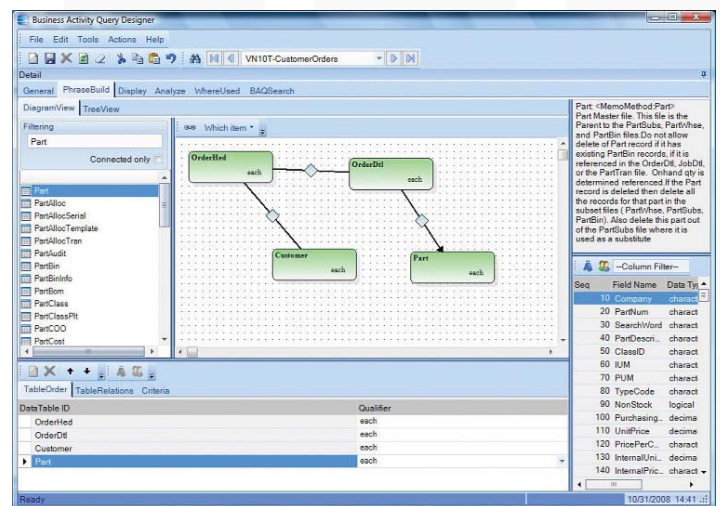
The BAQ Designer includes easy to use wizards to help you define your query—or you can create the query free-form. The BAQ can be accessed from various parts of the application.

Graphical Links

A graphical display for table links.

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.



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

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.

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®, 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.

Project ID	Project Name	Start Date	Cost	Customer Name	Bid Cost	Actual Cost
10-123	Edward Packaging Machine	3/1/2008	\$200000	Edward International	\$10000	\$10000

Phase	Project Phase	Phase Status	Percent Complete	Start Date	Estimate	Due Date	Duration	Description	Level	WBS Address	Project ID	ProjNo	Budget Cost	Status
Manufacturing	Shdy	N	0.00 %	1/31/2008	5.00	8/19/2008	8.0000000000	D	1	CAP1000	CAP1000-Shdy	\$5.00	\$17	
Installation	4threal	N	0.00 %	6/1/2008	0.00	6/1/2008	0.0000000000	D	1	CAP1000	CAP1000-4threal	\$0.00	\$11	

Task Description	Status	Comments	Start Date	End Date	Project Phase	TaskID	TypeID	Duration	DurationType
Eng Customer Sign Off	N		6/26/2008	7/1/2008	Shdy	EngCustOff	Complete	8.0000000000	D
Customer Sign Off	N		7/1/2008	7/1/2008	Shdy	Customer	Complete	8.0000000000	N
Major Sign Off	N		8/1/2008	8/1/2008	Shdy	Major	Complete	8.0000000000	D
Engineering Sign Off	N		7/1/2008	7/1/2008	Shdy	EngOff	Complete	8.0000000000	D
Production Ready to Ship	N		8/1/2008	8/1/2008	Shdy	ProdReady	Complete	8.0000000000	D
Installation Customer Sign Off	N		6/1/2008	6/1/2008	4threal	InstCustOff	Complete	8.0000000000	D
Installation Sign Off	N		6/1/2008	6/1/2008	4threal	InstOff	Complete	8.0000000000	D

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

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, return material authorizations (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

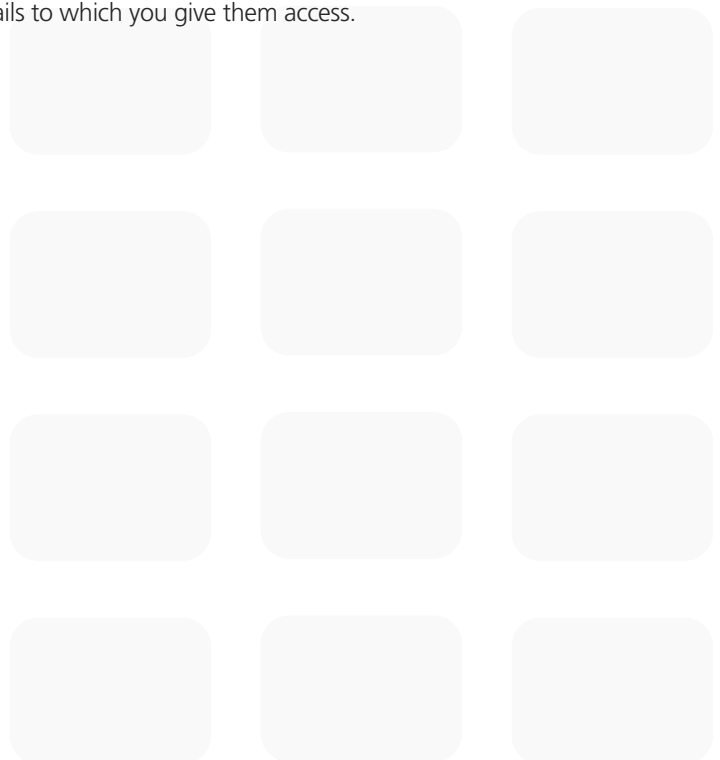
Improve business efficiency by extending traditional boundaries for doing business with suppliers. The Epicor Portal Supplier Content Pack provides interactive supplier facing content that supports strategic goals for improved supplier communication and direct collaboration on day to day business, right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

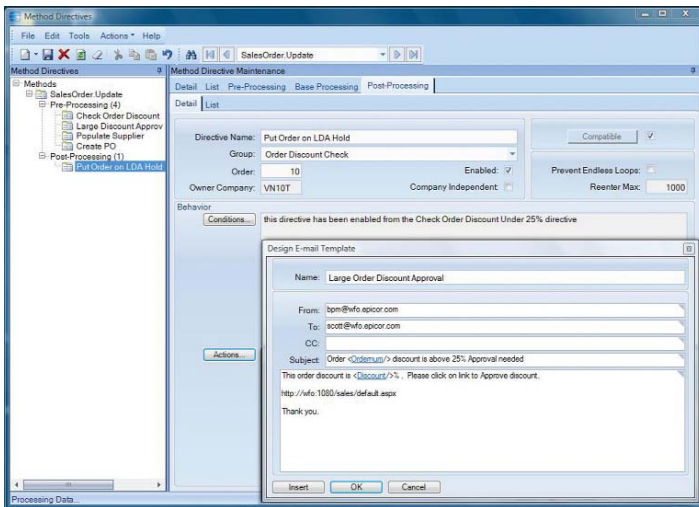
Secure Content Delivery

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).



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

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 multi-level 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.

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."

Epicor 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.

Epicor Service Connect

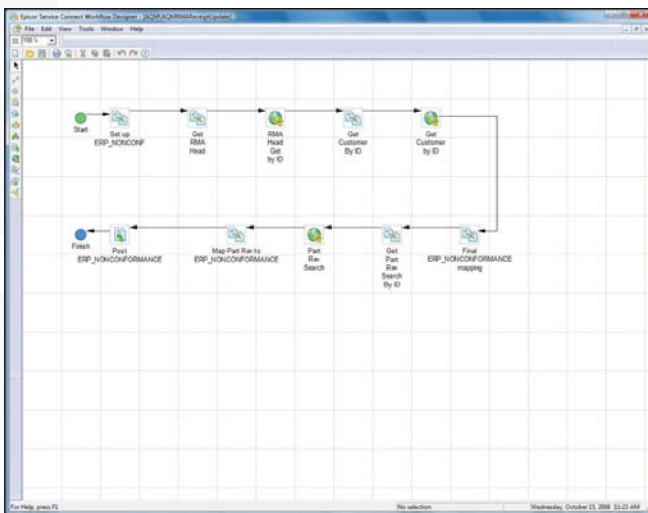
Epicor Service Connect is a powerful business integration platform, functioning as a central integration point for secure workflow orchestrations within Epicor applications as well as external connectivity to Epicor and non-Epicor applications.

Promote Lean Principles

Users can automate tasks and processes within the application to promote lean principles, continuous performance initiatives and Six Sigma quality within the organization or across the supply-chain. Service Connect lets employees focus on value added activities and management by exception instead of repetitive data (re)entry tasks. Built to support collaborative processes, Service Connect links different business entities, applications or users using open, industry wide standards and technology that enables businesses to deploy solutions—confident that their investment will remain intact for the future. Service Connect harnesses the openness of XML and includes service-bus functionality for Security, Messaging, Orchestration, Transformation, Scheduling, Notification, and Exception Handling to deliver rock-solid reliability combined with ease of use.

Much More Than A Programming Interface

Typically, the effort to connect different applications requires code for mapping the integration, proper error handling, scheduling, and so on. The aim of Epicor Service Connect is to eliminate this extra coding effort required to integrate an Epicor solution. Epicor Service Connect is more than a tool for integration; it is a platform for rapidly incorporating workflow and system orchestration through visual designers with little to no programming effort. Integrations can be easily built by using the Service Connect Visual Data Mapping tool to link and transform XML documents to map to different systems along multiple communication channels and protocols to support a wide range of integration scenarios.



Epicor Service Connect, a rapid platform for incorporating workflow and system orchestration through visual designers with little to no programming effort.

Secure Audit Trail

Service Connect logs workflow processing for both transactional integrity and compliancy. Processes are available for review and tracking while in progress or after the process completes. If for any reason processes error or stop, transactions are rolled back and queued for subsequent correction and resubmit. Notification services can be incorporated into the workflow to alert either the submitting application (e.g. system integration or EDI process) or an administrator.

Exploiting the Value of Epicor True SOA

Because Epicor solutions are built using Epicor True SOA, the power of Service Connect can be used to streamline processing within the application framework. Business components, represented as Web services outside of the application, can be recomposed within Service Connect to eliminate non-value added steps or potentially speed up any process. For example, processing sales orders typically involves multiple availability inquiries, reviews, inventory release decisions, etc. Orchestrating this process within the Service Connect Workflow Designer can eliminate many of these steps by routing processes to automated tasks, such as order-submit-direct-to-pick for specific inventory items or order fulfillment for your best customers. Other examples include: product lifecycle management (PLM) integration without entering change orders within a process workbench in the application; processing of e-mail attachments for automatic data input; and corporate governance best practices using task assignments with digital signatures.

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 (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.

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 2-D/3-D Computer Aided Design (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

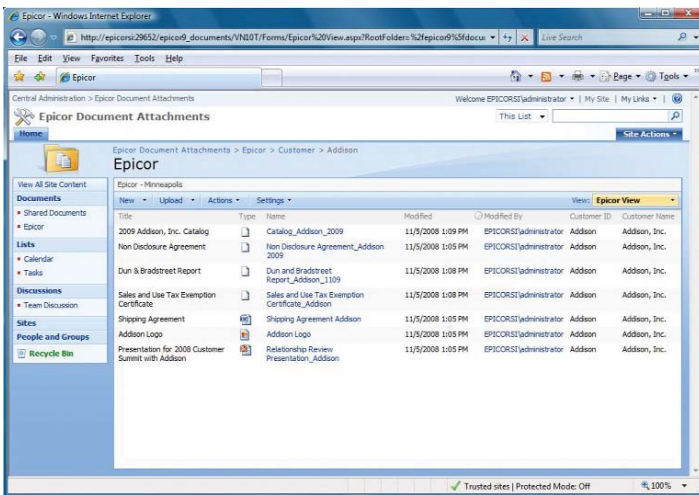
Automated product documentation workflow ensures the flow of accurate product documents to the production floor for viewing, redlining, and updating of drawings and other documentation related to the product, process, or material used.

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



Streamline document control with an integrated Microsoft SharePoint repository.

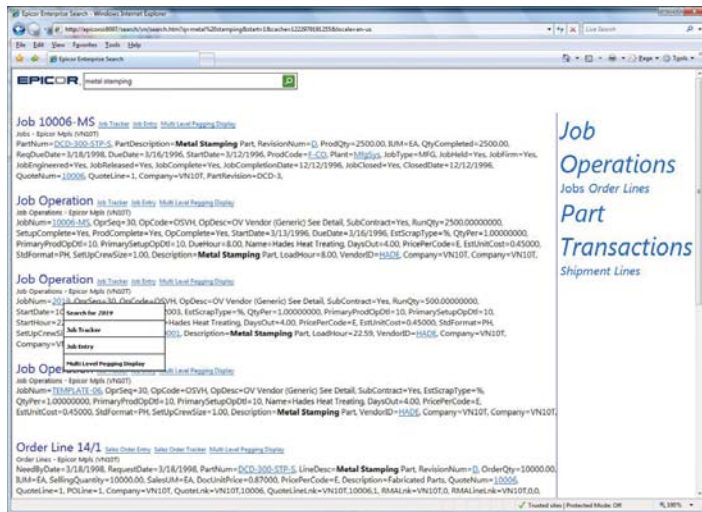
Drag and Drop Attachments

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

a user does not have access to columns, they are not displayed for that user.

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



Epicor Enterprise Search delivers “Google” like search options for relevant business information.

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.

Subscription Services

Epicor ICE extends really simple syndication (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 Vista® 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 Enterprise Performance Management (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 key performance indicators (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).

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.

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 pre-determined 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.

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 2.0 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.

DBAudit

Steadfast and trustworthy corporate governance requires truthful leadership and attention to detail. In many parts of the world governments are enacting legislation such as the Sarbanes-Oxley Act in the United States that mandates compliance to strict controls and business practices.

Working directly with Microsoft SQL Server, DBAudit delivers an easy-to-use, secure way to track changes to sensitive data within your business applications. Administrators can select the information they want to monitor and DBAudit logs every change to that data, whether the change is made through an application or by direct table updates. DBAudit is a tactical monitoring system that provides a record that serves as an audit trail and deterrent to aberrant practices, making it an ideal tool to incorporate into your internal control processes.

Software Development Kit

For those requirements that cannot be satisfied by the embedded customization layers, Epicor also offers an advanced software developer's toolkit (SDK) which is available at an extra cost and supplies the client source, framework UI and business logic tools necessary to write your own additions and extensions to the application. The SDK is a toolset used to create new software elements (or modify existing software elements if adoption of future releases is not a concern).

Use the Tools Our Developers Use

Epicor ICE SDK is a packaging of some of the tools that are used by the Epicor development group in the creation of base code. These tools allow a developer to make modifications or extensions to the base application or create new software within the same framework used for the base product. The Epicor ICE SDK allows developers to build their own custom modules and integrate and embed them into the product as though it were part of the base system.

Audit Control

Within the Epicor ICE SDK users can make changes to underlying business processes via the Object Designer. This allows users to tailor the system to meet their needs while at the same time tracking these changes as they represent a functional change to the software application that might need to be tracked for governance and compliance auditing. This is a significant addition to the customization options within the application framework.

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, material requirements planning (MRP), product configurator, job costing, and the posting engine.

Embedded Courses

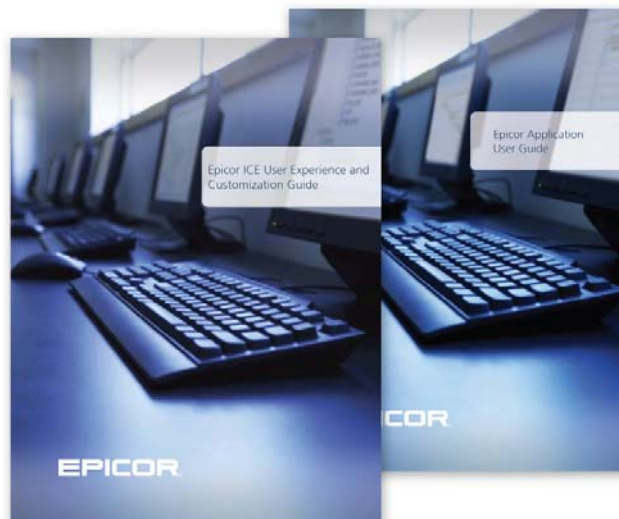
Courses are embedded within the Epicor application to simplify role based learning and optimize deployment.

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.

About Epicor

Epicor Software (NASDAQ: EPIC) is a global leader delivering business software solutions to the manufacturing, distribution, retail, hospitality and services industries. With 20,000 customers in more than 140 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, and also empower global enterprises to achieve even greater success.



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