

iSCALA 2.3 SERVICE RELEASE 1

RELEASE GUIDE – APRIL UPDATE

April 2008



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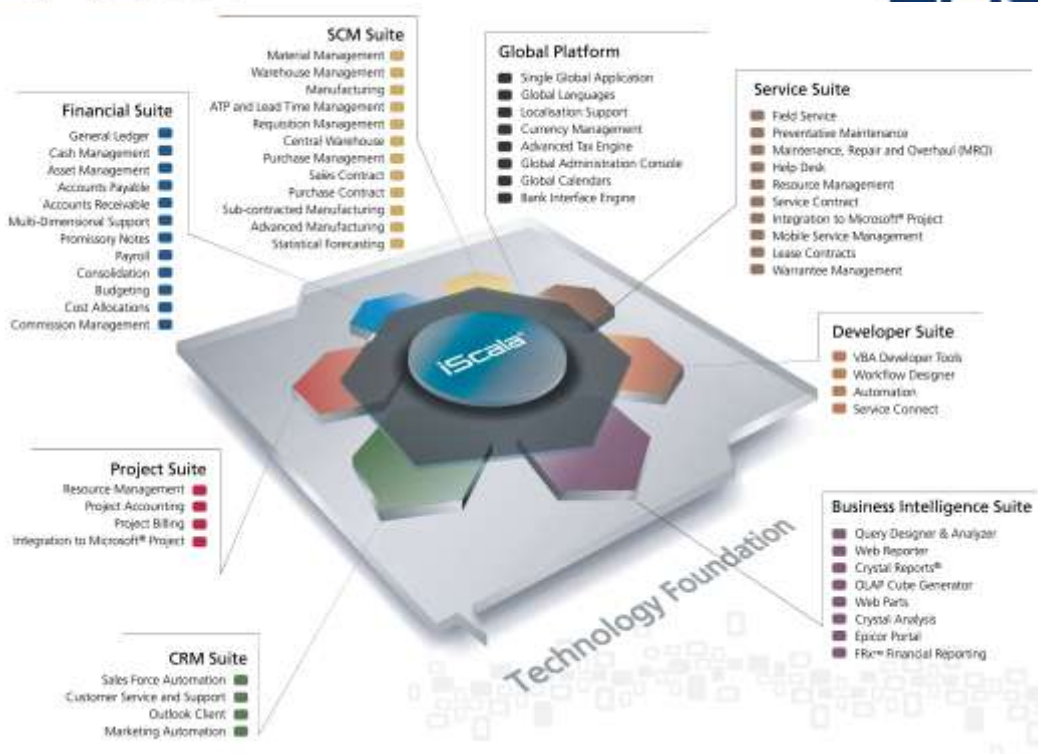
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Introducing Epicor iScala 2.3 Service Release 1

Introduction

For more than 20 years, Epicor Scala customers have come to expect valuable enhancements to the product suites on a regular basis. iScala 2.3 SR1 is no exception, delivering new features that offer more configurability and functional capabilities for your business.



iScala 2.3 SR1 reflects our fundamental philosophy as a software provider:

- Place customers at the center of everything we do
- Develop and deliver world-class software to help our customers achieve operational excellence
- Provide innovative technologies that empower our customers to become market leaders
- Surround our customers with resources and self-service tools to provide world-class customer service and satisfaction
- Deliver single point accountability in everything we do

Epicor iScala comprises seven product suites that deliver end-to-end enterprise software designed for the divisions and subsidiaries of global enterprises as well as local companies in specific vertical industries.

What's Inside

This guide covers the features, functionality and technology introduced with iScala 2.3 Service Release 1. The guide is designed to be an introduction to the key features of the release. Further details can be found in the User Guide shipped with the system. The guide also provides information on professional services, product support, education and other important topics related to this release. Please note that all information in this document is subject to change without notice.

iScala 2.3 SR1 Key Objectives

The scope of iScala 2.3 SR1 was defined in conjunction with our customers whilst also addressing Epicor's objectives and, more specifically, iScala product strategy. The key objectives of iScala 2.3 SR1, which help frame the scope and identify the selected features, can be outlined as:

- Protecting and enhancing the investment of our existing customers, with a particular focus on usability and expansion of existing functionality
- Providing rich functionality for Rental, Distribution and Manufacturing organizations
- Enhancing core functionality for our key vertical markets
- Continuing our focus on corporate governance and security to help reduce the costs of compliance
- Expanding our global footprint by completing the merge of Italian, Spanish and Portuguese functionality

iScala 2.3 SR1 Functional Highlights

With the objectives defined and customer requests analyzed the individual features were selected for development. The remainder of this document provides more detail on the key features but highlights include:

- Italian, Spanish and Portuguese localized functionality has been added to iScala based on functionality initially developed by local partners. Many of the key features from these regions including commission management, net pricing of sales order and additional payment methods will be of benefit to iScala's global customers.
- Commission Management extends iScala with almost unlimited staff being compensated for each sales, service, project or contract order and commission linked to value of funds received or discount granted (in addition to the existing iScala options to link to value of sales orders invoiced).
- Advanced Manufacturing has been added to the iScala SCM suite and significantly extends iScala's capabilities with support for net change MRP, warehouse pooling and improved standard cost management .
- Standard Manufacturing has also been extended with better support for both make-to-stock and make-to-order businesses
- Rental and Leasing organizations will benefit greatly from the new Lease Contracts module that provides support for both long term (finance/hire purchase) leases and short term (operating) leases. This includes management of both the assets that are being rented and the revenue streams derived from the rental/leasing activity
- Microsoft Project Integration with Scala Project Management will be of interest to all users of iScala Project Management who wish to improve the visibility and efficiency of resource management and planning.
- Usability in many of the iScala screens has been improved with the introduction of customizable screen areas.

- User Slot Reservation – It is now possible to reserve seats for named users so that senior staff are always able to gain access to their critical iScala systems

iScala 2.3 SR1 Key Customer Benefits

Gain user efficiencies through the configurable back office screens as well as the many new business processes supported in rental, leasing, manufacturing and supply chain.

Reduce the cost of corporate compliance with all changes to data received via Service Connect now captured in the iScala Audit log. Compliance is further simplified with role based snap search that can restrict what data users can view or select..

Improve operational efficiency in manufacturing through net change MRP, warehouse netting and grid based views of all action screen with right click access to underlying screens.

Improve operational efficiency in project by integrating resource planning on iScala Project to Microsoft Project.

Enhance customer relations through integration with Microsoft CRM 4.0 (to be released shortly after iScala 2.3 SR1 is released). A separate Release Guide will provide more details about iScala CRM 4.0

Standardize on iScala throughout the world with the merge of Italian, Spanish and Portuguese localization functionality and enhancements to support in many other regions and tax regimes.

Product Packaging

Over 100 new features are introduced with iScala 2.3 SR1 and the vast majority are provided as part of your maintenance upgrade, provided you are licensed for the pre-requisite module. However, we have added a few new price list items where the new functionality is substantial, the key items being:

Advanced Manufacturing will be of interest to all users of iScala Manufacturing incorporating:

- Net change MRP as a new option
- Warehouse netting so that raw materials can be grouped and linked to where production will take place rather than company wide
- Significant performance improvements through the use of server site, multi-threading capabilities.
- Near-real time MRP through the use of checksums to identify when demand has changed and a queue to process all changes sequentially as net changes, one change per server thread.
- Usability enhancements through grid based action screens with right click access to all detailed functionality including view work centre loading, firm/unfirm orders, release orders, change orders, split orders and convert work orders proposals to replenishment proposals and vice-versa

Lease Contracts will assist any organization that has assets and consumable items that are rented out. iScala Lease Contracts support both short term leases (also known as Operating Leases) and long term leases (also known as Finance Leases or Hire Purchase Contracts).

Lease contract functionality supports

- Control of assets that are chargeable and non-chargeable at client site for the life of the contract combined with sale of consumables and accessories
- Periodical or on-demand invoicing
- The ability to include complex combined activities such as the delivery, installation and commissioning of the rental items as single execution lines
- Graphical tool to easily show the operators what assets are available to rent out for a given period

- Managing depot warehouses for the rental assets and consumables

Commission Management will benefit any organizations that pay agents or sales staff on the basis of revenue. This module extends the basic commission support of iScala 2.3 with:

- Link commission to revenue received rather than amount ordered or invoiced, helping to avoid paying commission for sales that are not paid by the end customer
- Calculate commission for more than one agent or sales person per transaction. This assists where groups of sales staff are commissioned based on joint sales, or where agents and managers both receive commissions on sales
- Link commission to either revenue received or value of discount included in the revenue received. This means that staff can be incentivized to minimize the levels of discount granted.

iScala Project Management integration to Microsoft Project Microsoft Office provides a great visual environment for managing resources but has very limited ability to track financial costs. iScala has had market leading capabilities to manage complex projects. With iScala 2.3 SR1 it is now possible to combine these two products to deliver a fully integrated solution that includes bi-directional update. Projects and resources can be defined in iScala and then planned and scheduled in Microsoft Office Project.

Global Capabilities

Italian Localizations

SALES ORDER ENTRY

It is now possible to enter a net price during order line creation and/or adjustment, with the discount being calculated automatically by iScala. It is also possible to enter the net total for the order, with the discount calculated and apportioned to each line.

SALESMAN/AGENT COMMISSION

Support for up to 10,000 different agents to have commission calculated / managed simultaneously for each order; management of commissions based on unlimited discount and commission percentages. Reason Code & Delivery Note - Reason code for stock withdrawal (printed on documents).

MULTIPLE DUE DATE

Installment functionality is enhanced to support splitting a sales invoice amount into 12 installments with 12 different due dates.

SALES PAYMENT (RIBA)

Full support for Riba method of draft payments including generating a Riba proposal, adjustment, printing, creation and updating the bank file, draft payments input and bills in suspense (Insoluto) creation.

OFFICIAL LEDGER BOOKS

Support has been added for Italian official ledger books, including Opening Balance Book, General Transaction Book and Closing Transaction Book. This enhancement includes control over ordering by date, progressive numbering, opening and closing period balance, summative balances at the bottom of every page and carried forward to the top of the next page, no blank pages or lines.

FINANCIAL PARAMETERS & MASTER DATA

Multiple master data and parameter fields have been added in all modules to support Italian requirements. This includes::

- Customer Master additional fields - invoice address code, invoice sent code, VAT code plafond, merge draft/RIBA, payment address code draft/RIBA, payment status / profitability, salesman ii, salesman iii, intent declaration number, intent declaration date, intent declaration amount.
- Customer Tax Exemption – definition of tax exemption protocol parameters in customer files.
- The Salesman II and III fields are replaced with a new screen where the user can assign up to 10000 salesmen to customer. The salesmen are used in Commission Management functionality in sales and service order.
- Sales Ledger Parameters - Including extra payment terms, Bank Code, Caparra (Deposit), Statistical Account accept as account.
- Supplier Master Additional Fields – Withholding Tax Code.
- General Ledger Parameters - Additional parameters are added.
- Withholding Tax Codes – the registry of withholding tax codes includes definition of rates and corresponding accounts.

TAX MANAGEMENT

iScala tax handling has been enhanced to support the following Italian requirements:

- Sales & Purchase Ledger VAT Code Validation Algorithm - Every customer/supplier is identified by a unique VAT code and a fiscal code. It is now possible to use an algorithm to validate that the last character (a control digit) is correct.
- Sales & Purchase VAT Books - Printing and reprinting onto official numbered journal.
- Sales & Purchase Ledger Euro VAT - Euro transactions must be printed in a separate book.
- Withholding Tax Management - Increased flexibility of managing withholding tax, including tax adjustment and additional DDFs.
- Tax Exemption – calculation of taxes in sales invoices in accordance with customers' tax exemption protocols.
- Taxes for FOC (free of charge) items – Calculation of taxes for FOC items with zero sales price.

PRINT/ADJUST SALES & PURCHASE LEDGER JOURNAL

New function for adjustment of VAT and withholding tax information inside adjustment of journal transactions in the PL and SL modules. Additional functionality in the Invoice and Payment journals supporting transaction adjustment.

PURCHASE INVOICE & PAYMENT MANAGEMENT

Purchase invoice and payment functionality is enhanced with support adjustment of::

- Entry of Purchase Invoice - Supports adjustment of local and EU VAT, IntraStat and Withholding Tax functionality.
- Print/Adjust Purchase Invoice Journal - Additional functionality in the Invoice and Payment journals supporting transaction adjustment.
- Automatic Payment Draft (CBI Setif) - Proposal based on bank code and results in three different transfer files being created.
- Purchase Ledger Manual Payment - Withholding tax screen. Exchange rate calculation for partial payment.

WAREHOUSE EVALUATION

Printout of official report.

FIXED ASSET DEPRECIATION CALCULATION METHODS

To support Italian requirements Ordinario and "Anticipato" fixed asset depreciation methods are now supported. 'Ordinario' is a fixed percent every year but halved in the first year, "Anticipato" is similar to 'Ordinario' but double for first three years.

INTRASTAT

Full management of Italian IntraStat requirements, export to "Idep" for Sales and Purchase Orders.

DOCUMENT PRINTING

Multiple enhancements including additional DDF codes (supports passing every DDF code to VBA and returning a value), invoice selection, VAT rounding, and others.

Spanish Localizations

MULTIPLE & SIMPLE PAYMENT TERMS

Payment terms have been adapted for the Spanish and Portuguese markets to include Simple and Multiple Payment Terms. This change affects the payment term definition and calculation of Due Dates in Sales and Service Orders. Up to three Fixed Payment Days and a "Month to Exclude Payment" can be specified for each Customer or Supplier.

BANK ACCOUNT VALIDATION

When entering/adjusting a Customer or Supplier, the Bank Account (if entered) is verified against the 'CCC code' and 'IBAN Code' algorithms.

VAT SURCHARGE TAX "RECARGO DE EQUIVALENCIA"

Additional flexibility to adjust to the way VAT is calculated for companies which do not transform products. In tax settings it is possible to link the VAT codes an additional VAT Surcharge Tax Code. The Customers can be configured to use "Recargo De Equivalencia", as required. The Tax reports include both VAT and VAT Surcharge Tax.

SALES ORDER TAX CHANGES

When printing Sales Order Invoices, the VAT Surcharge amount is also printed.

MULTIPLE DUE DATES

On Sales Order Invoices and Service Contracts, multiple due dates can be used and printed on relevant documents.

AUTOMATIC INVOICE NUMBERING AND ZERO AMOUNTS

Sales invoices can be automatically numbered via the setup and use of Sales Ledger Invoice Number counters A through to Z. Sales Ledger and Direct Invoicing Invoices may have an amount of 0.0.

FISCAL REPORTS FOR CUSTOMERS

Register of Issued Invoices & Annual Declaration for Operations with Third Parties (Model 347 for customers).

WITHHOLDING TAX

The registry of withholding tax codes includes definition of rates and corresponding accounts. An account can be assigned to each Withholding Tax code. The withholding tax values can then be adjusted in an invoice journals. The Withholding Tax Statement and Withholding Tax Summary can be printed by Transaction Date (rather than Payment Date).

PRINTING CHEQUES AND PAGARES

It is now possible to print the cheque amount and date in Spanish language on General Ledger or Purchase Ledger cheques. IBAN and Series information can also be included on Purchase Ledger cheque.

FISCAL REPORTS FOR SUPPLIERS

iScala can now create the "Register of Received Invoices & Annual Declaration for Operations with Third Parties" (Model 347 for suppliers).

AUTOMATIC INVOICES

Auto Invoices justify VAT reports for European Union operations. Sales within the EU are not charged with VAT, but the VAT is tracked, so that it can be reported to the Spanish Fiscal Authorities. The Internal EU VAT code of 0% should be used in the invoice. A routine is available for the printing and reprinting of Auto Invoices.

DEFAULT BOOK-ENTRY DATE

When entering Purchase Ledger Invoices, any changes to the Book-Entry date are kept for further invoices entered, until the program is exited.

AUTOMATIC PAYMENTS

The following automatic payments to Suppliers have been added:

- 34 rule banking standard Spanish
- 34 rule banking extended Spanish
- 34 confirming payment 'ATLANTICO Bank' Spanish
- 34 confirming payment 'La CAIXA' Spanish
- 34 confirming payment 'BBVA I and II' Spanish
- 34 confirming payment 'BSCH I' Spanish
- 34 rule banking 'BSCH II' Spanish
- 68 rule banking standard Spanish
- PS2 payment 'Do ATLANTICO' Portuguese

SALES ORDER DELIVERIES

Partial deliveries are allowed without the need to Invoice independently for each delivery. The Delivery Notes can have unique numbers, and can be reprinted.

ORDER CONSOLIDATION

Order Merging supports the following selection criteria:

- Only what has been delivered
- Yes/No - Counter (controls numbering of Sales Orders after merge)

OFFICIAL DAY BOOK JOURNAL

Support for the Spanish Official Daybook Journal.

CLOSING TRANSACTION LIST FOR THE FISCAL YEAR

Shows details of opening transactions, list of Ordinary transactions, profit and loss transactions and closing transactions.

TRANSACTION ACCOUNTS TO CERG

An export routine from the General Ledger a detailed register of transaction accounts to the external CERG-Finance system.

CARTERA

Including draft issues, remittances, reporting and bank file generation (according to the Rules of Spanish Private Bank Association) requirements:

- Invoices can be assigned a Draft Type (way of payment), and status, either directly, or through Customers and/or Delivery Terms. iScala can automatically issue the drafts for invoices which have a Draft Type other than zero, and to print the Draft Issue report. The drafts can then be approved (if necessary). This feature also supports Direct Payments (documents that are not related directly to an Invoice).
- Automatically create Remittance proposals and print them, modify the Proposals (perhaps adding more Drafts to them, or modifying them to definitive remittances), Cancel/Approve the Proposal, Update the Due Drafts and Manage the Unpaid Drafts.
- Various printing requirements including Draft Report, Remittance/Proposal Report, Transaction Reports, Bank Status Report and bank file creation with printing

Remittance to Rule 19 Report or Remittance to Rule 32 Report, or Remittance to Rule 58 Report.

Portuguese Localizations

PRINTING CHEQUES AND PAGARES

It is now possible to print the cheque amount and date in Portuguese language on General Ledger or Purchase Ledger cheques. IBAN and Series information can also be included on Purchase Ledger cheque.

AUTOMATIC PAYMENTS

The following automatic payments to Suppliers have been added:

- PS2 payment 'Do ATLANTICO' Portuguese
- 4P Disk Transfer method, Cheque (Portuguese)

AUTOMATIC INVOICE NUMBERING AND ZERO AMOUNTS

Sales invoices can be automatically numbered via the setup and use of Sales Ledger Invoice Number counters A through to Z. Sales Ledger and Direct Invoicing Invoices may have an amount of 0.0.

CARTERA

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- Automatically create Remittance proposals and print them, modify the Proposals (perhaps adding more Drafts to them, or modifying them to definitive remittances), Cancel/Approve the Proposal, Update the Due Drafts and Manage the Unpaid Drafts.
- Various printing requirements including Draft Report, Remittance/Proposal Report, Transaction Reports, Bank Status Report and bank file creation with printing Remittance to Rule 19 Report or Remittance to Rule 32 Report, or Remittance to Rule 58 Report.

Danish Payroll Localizations

DANISH DS-DA STATISTICS

In Denmark all employees must be associated with region and location codes (DS-DA codes predefined by the government) and changes to these codes must be tracked. Each month, quarter and year it is necessary to provide the authorities with a report showing DS-DA code changes.

VALIDATION OF DANISH SOCIAL ID

Each person in Denmark is given a unique social ID code. There are specific algorithms to check whether a social ID code is valid or not. These algorithms must be implemented in any system dealing with social IDs.

TEXT FILE DATA IMPORT

At the beginning of each fiscal year in Denmark the local tax authorities provide employers with a text file specifying the details for each employee's taxation terms. This file should be imported into the system storing these details in the payroll database. The import routine must also run the Social ID validation algorithms (separate feature) validating each employee.

Other Localizations

NORWEGIAN VAT REPORT

Legal requirement in Norway will be released in an early hotfix to this release.

INDIAN MOVAT TAXES

Deliver a solution to meet India market requirements, including Central Excise and Customs (enhanced in iScala 2.3), Sales Tax/Value Added Tax (enhanced in iScala 2.3), Income Tax (including Tax Deduction at Source). This feature will not be available in the initial release and is planned to be part of an early hotfix. When released this will support Central Excise Registers including:

- RG1 (Daily Stock Register)
- PLA (Personal Ledger Account)
- RG 23A Part I (Quantitative Records for Raw Material)
- RG 23A Part II (Duty Register for Raw Material)
- RG 23C Part I (Quantitative Records for Capital Material)
- RG 23C Part II (Duty Register for Capital Material)
- RG 23D (Trading Register)
- CENVAT Monthly Return (Input and Capital Goods)

SWEDISH BANK GIROS & PLUSGIROS

Requirement to support new products from Bankgiro and PlusGiro called "Bankgiro Inbetalningar" and "TotalIN". These new products are similar to each other, with slightly different file format. Both products create a file with payments which should be imported in iScala. The new products replace old products and create a single file which will support all products from Bankgiro and PlusGiro.

SWEDISH IMPORT SUPPLIER PAYMENTS

Support import of file from the bank with Supplier payments which can be imported into the Purchase Ledger, avoiding manual entry. Requirement supports an 80 character record defining Supplier payments for reconciliation of the PL with bank transactions; the key requirement being to develop an automated method of mapping records from import file with invoice payments registered in the PL.

SWEDISH OCR NUMBER ON INVOICES

For payments made via Swedish banks two control numbers (a check digit according to Modulus 10 and a length digit), must be printed on the invoice (reference) number and invoice amount.

LONG CUSTOMER AND SUPPLIER NAMES

In some countries the legal name of trading partners can be longer than the 50 characters supported in prior versions of iScala. In Thailand and Indonesia invoices are not legally enforceable if the full and correct name is not included. To resolve this issues the length of the customer and supplier name has been increased to a maximum of 200 characters.

Supply Chain

Commission Management

Support for up to 10,000 different agents or sales staff to have commission calculated / managed simultaneously for each order; management of commissions based on the value of sales orders entered, value of sales invoices issued or the value of revenue received. For commission based on revenue received the commission can also be linked to the amount of discount granted.

Other Supply Chain Enhancements

SALES ORDER NAVIGATION

Provides a sales order entry/maintenance user interface similar to the Service Order entry/maintenance configurable user interface created in iScala 2.3. In this release all sales order header fields have been moved to tabbed screens and are available for including in a single customized sales order header area. Local toolbars can be defined in the sales order header and sales order line screens to include a number of buttons or shortcuts including open sales order lines screen.

NET PRICE SALES ORDER ENTRY

It is now possible to enter the sales price net of any discounts either on a sales order line or order total and have iScala calculate the applicable discounts. Any discounts applied can then be used as part of the commission management calculation.

PRICE AND DISCOUNT CALCULATION

Often clients ask how discounts have been calculated or what then how many more of an item they need to purchase to receive a better price. The new Price Discount Calculation tool provides the answers to these questions and is accessible either as standalone screen (for ad-hoc enquiries) or during the entry of sales and service orders.

ITEM LIFECYCLE SUPPORT FOR SALES ORDERS

For many years iScala has had status flags against stock items to indicate if items are, for example, Obsolete, End of Life etc. It is now possible to control which users can create or amend sales order lines for such items, with permissions that grant or restrict access as appropriate. The controls are also available to restrict sales orders received via XML.

CAPTURE OF ZERO QUANTITY SALES ORDER LINES

Forecasts are increasingly being used as part of mainstream business to predict future demand. Most forecasts are generated starting from prior period sales statistics. This provides a wealth of data about prior demand and iScala sales statistics include both requested and actually delivered quantities. There was one notable exception, if goods were requested but none could be delivered then iScala did not record the zero quantity line in the sales order, and hence did not copy any zero quantity lines into the statistical records. This omission has now been resolved and iScala retains statistics for sales lines where a quantity was requested but no quantity could be delivered according to the iScala ATP calculation.

HIERARCHICAL UNIT OF MEASURE

Extension of existing unit of measure functionality so that it is possible to define one unit of measure in relation to another. A utility is included in the Unit of Measure management screens to calculate quantities from one unit of measure to another. For example, if one unit of measure is 1 gram, it is possible to set another as 1 Kilogram and define it as $1000 * 1$ gram and set another unit of measure as Box, with one box equal to 1 Kilogram. Once set-up it is possible to view the quantity as any hierarchically linked unit of measure, for example, select a box and view weight in Kilograms or Grams.

The number of different unit of measures is also increased from 40 to 9999 and longer descriptions for each unit of measure are now supported.

MOVEMENT OF BATCHES UNDER QUALITY CONTROL

It is now possible to move batches that are under quality control and not released as good for sale. This enables warehouse staff to maximize their use of available space and quality staff to move goods to/from testing locations without any risk of such goods being sold to customers. Movement can be from bin to bin or warehouse to warehouse.

WAREHOUSE INTEGRATION IMPROVEMENTS

A number of limitations in the iScala Warehouse Integration solution have been included to remove limitations relating to using serial numbers when reporting stock transactions, reporting the actual batch picked during picking and the supporting the movement of locked batches via XML reporting.

Manufacturing

Advanced Manufacturing

INSTANT LOW LEVEL CODE

As part of Advanced Manufacturing iScala will pre-calculate relative low level codes (LLC) whenever items are added or changed within manufacturing Bills of Material. This LLC can then be used in subsequent MRP calculations avoiding the need for a separate, time consuming LLC calculation step. It will still be possible to recalculate all LLCs on demand if required

DEDICATED MRP SERVER SUPPORT

The MRP calculation is one of the most complex and computationally intense activities undertaken by iScala. Many organizations run MRP at night to avoid any performance impact on other users. Advanced Manufacturing will add support for moving the MRP calculation to one or more dedicated server(s) significantly reducing the time required to run the MRP calculation and removing the performance impact on other iScala activities

NET CHANGE CALCULATION

There are two types of material requirement plan (MRP) algorithms, so called Full Regeneration calculations, where all requirements are replanned each run, and so called Net Change calculations where only the impact of changes in demand, capacity and supply are calculated. iScala MPC only supports Full Regeneration calculations. Advanced Manufacturing adds support for Net Change calculations significantly reducing the time required to calculate the impact of changes. Net change is fully supported by the Dedicated MRP Server capabilities and when combined this gives exponentially improved performance compared to iScala MPC MRP calculations

IMPROVED ACTION LISTS DRILL-DOWN CAPABILITIES

The outputs from the MPS and MRP processes are order proposals and an action list that identifies problems for manual intervention. There can be many reasons for items to appear in action lists including the need to delay or expedite existing orders and approval needed due to time fence issues. With this new capability it is now possible to view the action list and all proposed orders on-line and drill-down to the appropriate screen needed to resolve the action item or manage the order. In addition it is possible to view the load on specific work centers as part of the action list review.

SPLIT PROPOSED WORK ORDERS

iScala has always provided tools to review work order proposals and make limited adjustments. With this release it is now possible to split proposed work orders into two separate orders that can then be routed differently or possibly outsourced to sub-contractors with limited capacity. With this capability it is now possible to match order size to work centre capacity.

NEAR REAL-TIME MRP

Whenever a business activity is recorded in iScala that could have an impact on the MRP results this can be stored in a net change queue. The MRP Server can be configured to monitor this queue and immediately run a net change calculation, delivering MRP calculations in near-real time to business users. The queue can be paused at any time, and then released for further processing as required giving planners stability and planning window options to match their business cycles

MULTI-PLANT MRP

By defining groups of sales and supply warehouse into netable groups that match your plant structure, iScala can calculate separate production plans for multiple plants within the same MRP run. The Advanced Manufacturing features of Net Change MRP with support for multi-

threaded calculations can then be used to ensure that MRP is reasonably fast even in a multi-plant environment that may have large numbers of products to make.

NETABLE AND NON-NETABLE WAREHOUSES WITHIN MRP

The goal of MRP is to match available resources to demand and identify gaps in the form of work and purchase order proposals. Raw materials and components can be located in many different iScala warehouses, and demand can be placed against many different iScala warehouses. Standard iScala MRP assumes that all materials are available to solve demand from all locations. Advanced Manufacturing adds the option to define which materials can be used to satisfy what demands by warehouse. Businesses that need to match specific raw materials to end demand (for example if goods are provided by end customer) or keep different demand and supply segregated (for example if part of the operation is bonded and in a tax free enterprise zone) will benefit from this feature. Businesses that need to retain a stock of goods that should not be available to manufacturing, either because they have yet to be inspected (if iScala QA is not used) or because they are reserved for other purposes such as spare parts will also find this capability of significant business benefit

EXCLUSION FROM MRP OF BATCHES UNDER QA RESTRICTIONS

MRP is a "time phased" view of demand and supply. The classic assumption is that raw materials currently in QA inspection will be available for use by the time they are required in production and so are assumed to be available to the MRP algorithm. Advanced Manufacturing adds the option to exclude such batches to support businesses where the QA process may be protracted or the results of inspection are often less than favorable.

EXCLUSION FROM MRP OF HARD ALLOCATED BATCHES

iScala provides tools to hard allocate batches of raw materials or items to sales, service or work orders. These are then not available to support other demand, however are still included in the standard iScala MRP available resource pool. Advanced Manufacturing adds the option to exclude all hard allocated batches, and to ensure the calculation is correct, work orders that have all raw materials pre-allocated are also excluded.

Manufacturing Value Pack Improvements

GRAPHICAL WORK ORDER AND WORK CENTRE PLANNING

Graphical Rough Cut Capacity Planning (RccP) and Detailed Load Planning - Capacity planning is critical to maintaining utilization ratios and avoiding overloading bottlenecks. iScala includes many reports and screens that let planners identify loading and overloading situations. Graphical Planning provides a single graphical interface to display different types of load and is now extended to include MPS and MRP planned orders, highlight overloaded work centers and separately identify work centers that are sub-contracted. Depending on the type of load it is then possible to drill-down to order details and make changes to dates etc with the option to then re-chain planned upstream and downstream operations. It is also possible to roll-up many detailed lines to view the overall load across many work centers and unroll the view to look at individual operations.

Manufacturing Improvements

IMPROVED INTEGRATION TO SALES ORDERS

To support the make-to-order and engineer-to-order markets iScala. iScala also offers lot-for-lot MRP sizing where work orders are created to match the demand of specific sales orders (as opposed to one work order for the total demand that may span many sales orders). Whenever there is a one-to-one link iScala has provided the work order number as a reference in the sales order. With this new capability, changes in the work order dates and status will be updated back to the sales order, providing a real-time update to customers if required of expected delivery dates and other details. In addition it will be possible from the sales order to view the work order details in case additional information is required.

MAKE/SUB-CONTRACT/BUY DECISION SUPPORT

Traditionally companies have items they purchase and items they make. However increasingly it is possible to either make or buy the same item and the decision will vary depending on lead times, manufacturing capacity and market prices. This release adds the option within MPS and MRP to change proposed work orders to propose purchase orders and vice versa. It is also possible at the same decision point to select different routings, adding the option to select to make the items using different work centers or outsource the production.

STANDARD COST CALCULATION PERFORMANCE IMPROVEMENT

iScala currently calculates the standard cost of each item in each warehouse separately, however often the same standard cost should be used for all, or most warehouses. It is now to set up a single standard costing warehouse pool, with costs defined on the primary warehouse and then copied to any other warehouses within the costing pool. This gives a single standard cost for the item. This will ensure consistency of accounting valuations and significantly reduce the time required to calculate and maintain standard costs.

CHAIN PLANNING ENHANCEMENTS

Often multiple operations must be undertaken to complete a work order, this is controlled by the routing. If one operation needs to be changed, either to move it to another work centre or change the start/end date then other downstream and upstream operations within the work centre must be adjusted, this is known as chain planning. This release adds enhancements to iScala chain planning to offer the option to exclude move- and queue times when calculating earliest start times for downstream operations. This will enable complex shop floors to improve work centre utilization and order completion time.

WORK ORDER LINE COUNTER INTERVAL NOW CONFIGURABLE

iScala work orders can include many detailed order lines. It is now possible to configure the numeric interval between each order line.

Manufacturing Integration Improvements

All improvements relating to Manufacturing Integration will not be available when iScala 2.3 SR1 is initially released but will be included in an early hotfix

WORK ORDER IN

Work orders can be created using iScala Manufacturing directly from sales orders, via manual entry or using MRP. However for organizations that need alternative planning and scheduling solutions it can be desirable to create the work order outside of iScala, and use iScala for shop floor control. This is now supported with the introduction of Work Order In via Service Connect.

Work Orders can be created externally and imported to iScala or created in iScala, exported to another system for update and then re-imported to provide a highly flexible solution that can adapt to support almost any discrete production environment. By combining the Work Order In with Manufacturing Bill of Materials In businesses can support complex make to order (job shop) production whilst retaining all the strengths of iScala.

MANUFACTURING BILL OF MATERIAL EXPORT

In a manufacturing environment many systems need to have details of Manufacturing bills of Material. It is now possible to export the BoM via iScala service connect as an XML schema that can then be imported by other iScala systems, PDMs, CAD/CAM or other engineering software.

BATCH NUMBER SUPPORT

iScala has a number of tools to assist businesses track products as they move through the warehouse and production facility including batch numbers (that remain static through the life of the item) and batch ID (that changes each time the product is moved, with a traceability table to support traceability). iScala Manufacturing Integration has always

supported material issue and operational reporting using batch IDs. It is now also possible to use batch numbers. This simplifies integration with bar-code systems where the batch number may be printed on a label that stays with the goods as they move around the facility.

UPDATE VIA MATERIAL REPORT NUMBER

To simplify the identification of specific activity iScala Manufacturing uses material report numbers to uniquely identify activity for a specific stock item as part of an operation for a work order. It is now possible to use the Material Report Number to identify materials issued to production. This will simplify integrations to other systems that have a similar concept.

Contract Management

Rental and Leasing

Lease Contracts can be recorded within iScala with full integration with other iScala modules including Asset Management (for depreciating assets), Stock control (for the sale of consumables and spare parts) and Service Management (for preventative maintenance on rental assets).

- Support for Operating Leases. Operating leases are leases that rent out items for relatively short periods. The item being rented is then returned and can be rented again by another party.
- Support for Finance Leases including Hire Purchase Contracts. Finance Leases are long term leases that typically rent out an item for the majority or all of its expected operating life. Hire purchase Contracts are a special type of finance lease that gives the lessee the right to purchase the underlying rental items at the end of the lease period for a pre-defined lump sum.

Lease Contracts can include:

- Lease lines with assets
- Lease lines with accessories, these are normally low value assets, kept in Depot Warehouse, at zero cost
- Maintenance (service) lines for assets
- Maintenance (service) lines independent of assets

EXECUTION ORDERS AND EXECUTION LINES

Any lease contract can include an Execution Order. Execution Orders are used for complex activities that require commissioning, assembly, disassembly or other engineer activity on site as part of the delivery, repair, or return process. The execution order will be invoiced in Contract Management as part of lease contract invoice. Execution order can include four types of line

- Execution line
- Time activity lines
- Cost activity lines
- Material activity lines

OTHER LEASE CONTRACTS CAPABILITIES

In addition to already mentioned features the Lease Contracts module has many features that support the rental and leasing process.

When setting up a contract it is important to have tools to assist with pricing and locating assets. iScala Lease Contracts includes many pricing options, for example, lease charging using annuity formulas with fixed payments, pre-defined pricing for assets and accessories and best price tool. A graphical tool is also available to assist with finding which assets are available to rent for any given period.

During the life of a lease it is possible to receive back partial returns and invoice, invoice using different time units and ensure that asset accounting is correct with depreciation of the capital and interest recognized for Finance leases

At the end of a lease, when the asset is returned iScala accounting is updated as you would expect from a fully integrated ERP and invoice statistics are automatically collated. It is also possible to automatically generate service orders to refurbish and inspect the returned items.

Other Contract Improvements

DEPRECIATION OF SERVICE MATERIALS

Many businesses provide a mixture of charged for and free-of-charge items to customers, for example you may provide a display case or dispensing machine without charge to your customers (that required regular maintenance activity) if they continue to use it solely for your products and purchase consumables from you. To support this business process it is now possible to capitalize stock items to create assets that can be depreciated and tracked as part of a service or rental activity without the need to charge your customer's for the asset.

CUSTOMIZABLE USER INTERFACE

The Contract Management screens have been redesigned to look like the new configurable Service Order screens providing the same flexibility, configurable custom areas and toolbar. Setup is performed for each contract category (service, lease, sales and purchase) separately.

AUTOMATIC ACCOUNTING SCHEDULE

iScala Automatic Accounting Schedules (AAS) provide your business with the flexibility you need to automatically let your business activity create accounting records. For Contract based accounting two new layers have been added (Customer and Contract) and two new meta-account groups have been added (Capital and Interest)

IMPROVED PRINTING OF CONTRACT DOCUMENTATION

In an ideal world there would be very little need to print documents, however most businesses and jurisdictions require printed documents and to support this additional flexibility has been added with the option of grouping lines by line group and the introduction of three levels of details in contract documents: lines, group total, document total. It is also possible to now group contract documents using the Master Contract reference.

COPY CONTRACTS

Often it is less error prone and quicker to copy details from existing contracts rather than enter all details again. iScala 2.3 SR1 extends the existing copy capabilities with support to copy contract header and lines from different existing contracts of the same category.

AGENTS / COMMISSIONS

The new Commission Management module is integrated with contracts so that agents or sales staff can be compensated for contract driven activity in addition to stand alone sales and service management.

CURRENCY ROUNDING

All iScala Contracts now use the standard iScala rounding engine for currency management.

Service Management

DEPRECIATION OF SERVICE MATERIALS

Many businesses provide a mixture of charged for and free-of-charge items to customers, for example you may provide a display case or dispensing machine without charge to your customers (that required regular maintenance activity) if they continue to use it solely for your products and purchase consumables from you. To support this business process it is now possible to capitalize stock items to create assets that can be depreciated and tracked as part of a service or rental activity without the need to charge your customer's for the asset.

SM OFFLINE SUPPORT

iScala 2.3 SR1 includes tighter integration between Mobile SM Client and iScala, including serial number history and service history information. More modern user interface is also provided on the client.

INVOICE CONSOLIDATION

It is now possible to consolidate invoices based on selected orders during invoice printing and set the new sources for consolidated invoice accounting dimensions. It is also possible to exclude the orders from any type of consolidation

PREVENTIVE MAINTENANCE

The preventive maintenance module has been enhanced to support different types of service object including:

- Sock items (items tracked in iScala stock control),
- Assets (items tracked in iScala Asset Management) and
- No object (used for generic jobs like inspections or used to avoid setting similar jobs for every stock item or asset)

LINE GROUP AND DOCUMENT SPECIFICATIONS

iScala Service Management documentation options have been extended with the possibility to group lines by line group and the introduction of three levels of details in contract documents: lines, group total and document total.

CLOSE ORDER ROUTINE

To simplify the process of closing service orders a new routine has been added that can close long and short term service order via selection criteria

AGENTS / COMMISSIONS

The new Commission Management module is integrated with service management so that agents or sales staff can be compensated for service driven activity in addition to stand alone sales and contracts.

Project Management

Integration to Microsoft Office Project

Providing the same bi-directional support already available for iScala Service Management, this new integration lets your users plan and schedule project resources within the graphical, drag-and-drop environment of Microsoft Office Project Professional 2003, Microsoft Office Project Professional 2007 or Microsoft Office Project Server 2007 whilst maintaining fiscal control of your activities and resources in iScala Project Management.

Payroll

Advanced Payroll

IMPROVED PERFORMANCE

The technical architecture of Advanced Payroll has been enhanced so that the most time consuming activities including draft payroll computation and final payroll update can be run in a multi-threaded processing environment with computations spread across multiple CPUs. This will deliver significant performance improvements for organizations that need to process large payrolls that may run to thousands of employees.

CUSTOMISABLE TREE VIEW ACROSS MULTIPLE PAYROLLS

The graphical representation of payroll resources within a tree view has been extended with user definable structures and node definitions. All resources' attributes and their transformations can be defined as custom tree node levels with drill-down capabilities and user persistence for quick access to user's preferred views. This usability enhancement, available on both private and public tree views lets your users view multiple organizational structures as they find most efficient for their day-to-day work, without being limited to a single view that matches your organization's legal structure. Custom trees can also be used to combine in a single view resources that are legally part of separate entities or organizational units.

PAYROLL RESOURCES FILTERS

In a large organization it can be time consuming, even with well designed tree views, to find the resources you need quickly. The new payroll resource filters can be used to quickly list those resources that match a set of criteria.

ACCESS IMPROVEMENTS

It is now possible to remotely log into the Advanced Payroll module in an exclusive mode to ensure that other users do not sign in during high risk maintenance activities. It is also now possible to change the payroll company and financial year without the need to log out and then logging back in again.

PAYROLL DATA IMPORT FROM TEXT FILES

Previous versions of iScala offered the ability to import payroll related data from text files. This capability was missing from Advanced Payroll and has now been added in, as an addition to import using XML based capabilities.

MASS PAYROLL PAYMENTS / DEDUCTIONS REGISTRATION

Often payroll and deduction data is created outside of the main payroll system and needs to be imported. iScala Advanced Payroll Mass Registration simplifies this process by extending the item-by-item import with the ability to import many payments and deductions for many employees in a single batch. Once entered, the data can be reviewed and adjusted or rolled-back as required with support to enter exchange rates and other supplementary data as needed. Organization that have multiple foreign currency deductions will particularly benefit from this feature as the payments can be imported as soon as they are known, with exchange rates entered later as appropriate.

CONFIGURABLE PAYROLL STATISTIC VIEW

Payroll statistics can often be complex and difficult to analyze. iScala Advanced Payroll now includes the capability to configure the way payroll statistics are presented using grouping, sorting, time-phased aggregation and other tools to make it easier for your staff to monitor payroll activities and identify underlying trends or issues that need investigation. If more detail is required users can use the new drill-down capabilities to view the underlying detailed transactions.

Corporate Compliance

Companies operating in tightly regulated industries such as the pharmaceutical or food and beverage industries, or publicly traded companies operating in the United States, have to comply with strict corporate governance legislation. iScala makes a significant contribution to compliance efforts in a number of ways, ranging from the architecture of the system and the detailed and robust security and reporting features, to the fact that iScala is a truly global product, with localizations and support for most major markets, allowing you to deploy the same standardized system wherever you do business.

In iScala 2.3 SR1 we have extended the automated support for corporate compliance in the following areas:

- Segregation of Duties
- Security
- Information Tracking

Segregation of Duties

ROLE BASED SCREENS

Administrators can define different screen layouts optimized for different roles. By combining field level security (that can hide or make fields read-only) with custom screen layouts it is possible for administrators to ensure that users only gain access to the functionality they should have access to

ROLE BASED SNAP SEARCH

Snap Search functionality has been enhanced so that for each field in iScala, you can now define the list of admissible values per end user role. For example, you can set up validation Snap Searches to ensure that warehouse staff can enter stock transfer transactions for product groups A, B, and C, while only the warehouse manager can enter transactions for product group D.

ADDITIONAL PRE-DEFINED PERMISSIONS

Administrators have the ability to create custom permissions that make any field in iScala hidden or read only. With the release of iScala 2.3 SR1 additional pre-defined permissions have been added to the system to simplify the creation of robust segregation of security controls

Security

SECURE SOCKET LAYER (SSL) SUPPORT FOR SERVICE CONNECT

The Secure Socket Layer (SSL) Protocol is one of the most common technologies currently available to encrypt and authenticate sensitive data during transmission. iScala 2.3 SR1 adds support for SSL to protect valuable business data sent or received using Epicor Service Connect

Information Tracking

TASK MONITOR AUDIT TRAIL

The Service Connect Task Monitor, the interface that is used to check, correct, approve or reject electronic business documents, now has improved audit log capabilities. In iScala 2.3 SR1, each time a user changes data in an electronic document, the Task Monitor logs the event to the audit trail (Document Tracking).

BUSINESS EVENTS IN SERVICE CONNECT BACKUP/RESTORE

In iScala 2.3 SR1, the backup/restore functionality available for Service Connect has been extended to include the mapping of back-office business events to Service Connect workflows and scheduled events. This enhancement simplifies backup procedures and template rollouts.

Technical

Usability

SNAP SEARCH

As noted under security, snap search has been extended with the ability to defined role based snap searches

SCREEN CUSTOMIZATION

Most iScala screens now support sales order style navigation with the option to give different screen layouts to different user roles, grant more than one layout per role if required.

PRIVILEGE USER LICENSE RESERVATION

Have you ever wanted to quickly check something in iScala, only to find out that all concurrent user slots were taken? CFOs, CEOs, and system administrators need to be able to access iScala anytime, without having to call around the company asking end-users to log off and free up user slots. The Privilege User License Reservation functionality allows you to allocate user slots to named users, guaranteeing that these privileged users will always be able to access iScala.

Service Connect & Integration

BAR-CODE AND WAREHOUSE APPLICATION INTEGRATION

The iScala Service Connect Barcode Application Integration and the Warehouse Application Integration solutions have been extended to provide improved process capabilities where goods are allocated prior to picking (for example via common picking module) and batch control is not used. It is now possible to report just the quantity of goods picked without the integrated applications keeping track of iScala batch IDs. In addition support has been added so that it is possible to report that a different batch has been picked from the one allocated if required (to support such business processes as the warehouse staff discovering the originally allocated batch has been damaged). Furthermore it is now possible to move locked batches (i.e. batches with a batch status <> 0) using the Service Connect interface

SERVICE CONNECT HTNG COMPLIANCE

Service Connect now complies with the platform requirements defined by Hotel Technology New Generation (<http://htng.org>), a trade organization for the Hospitality industry that develops web services standards to facilitate the integration of software and hardware systems used by hotels.

Scalability and Support

64 BIT ISCALA INSTALLER AND NATIVE 64-BIT ISCALA SERVICES

iScala 2.3 SR1 Enterprise server adds support for the iScala to be installed either in 32 bit or 64bit versions of supported operating systems. The 64 bit installation includes 64 bit iScala services that enables users to take advantage of the greater performance and processing capabilities of 64 bit environments and so gain greater scalability from available hardware.

ENHANCED ISCALA TROUBLESHOOTER

The Help/About menu and the iScala troubleshooting utility now provide more detailed version and configuration information, to enable the Epicor support staff to diagnose problems faster and more accurately.

IMPROVED INSTALLER

iScala 2.3 SR1 and subsequent code releases will include a new installer that significantly improves the installation performance and stability of installations by providing a more comprehensive clean up of old installation files prior to installing new files. The new installer works across all supported operating systems and uses the same codebase for installations in both 32bit and 64 bit environments. It will no longer be necessary to first install iScala 2.3 SR1 and secondly install any hotfixes as hotfix installers will be able to install all software as part of a single installation process.

Reporting

DDF CALLS TO VBA

Often users want to add information into DDF driven reports for which there is no DDF code. It is now possible to have a DDF pass a call to VBA that can then calculate any required values based on any available data and return a value

Languages

CROATIAN LANGUAGE

iScala 2.3 SR1 is now available in creation as an additional language.

Additional Information

List of Software Corrections

All Hot Fixes issued for Scala 5.1, iScala 2.1, iScala 2.2 CR, iScala 2.2 SR1 and iScala 2.2 SR2 have been merged to iScala 2.3SR1. The additional list of issues requested for correction and fixed in iScala 2.3 SR1 only can be found at PRD-S23-090-002_iScala 2.3 SR1 List of fixed bugs.htm supplied with the DVD set.

Supported Languages

iScala 2.3 SR1 provides the following languages as part of the application DVD:

Language	Code page	Unicode
Arabic (ARB)	1256	UTF-16
Australian/New Zealand (ANZ)	1252	UTF-16
Brazilian (BRS)	1252	UTF-16
Bulgarian (BUL)	1251	UTF-16
Chinese Simplified (CHA)	936	UTF-16
Chinese Traditional (CHT)	950	UTF-16
Croatian (CRO)	1250	UTF-16
Czech (CZL)	1250	UTF-16
Danish (DAN)	1252	UTF-16
Dutch (NED)	1252	UTF-16
Estonian (EST)	1257	UTF-16
Finnish (FIN)	1252	UTF-16
French (FRA)	1252	UTF-16
German (GER)	1252	UTF-16
Greek (GRE)	1253	UTF-16
Hungarian (HUN)	1250	UTF-16
Italian (ITA)	1252	UTF-16
Japanese (JPN)	932	UTF-16
Kazakh (KAZ)	1251	UTF-16
Korean (KOR)	949	UTF-16
Latvian (LAT)	1257	UTF-16
Lithuanian (LIT)	1257	UTF-16
Norwegian (NOR)	1252	UTF-16
Polish (POL)	1250	UTF-16
Portuguese (PTG)	1252	UTF-16
Romanian (ROM)	1250	UTF-16
Russian (RUS)	1251	UTF-16
Slovak (SKL)	1250	UTF-16
Slovenian (SLO)	1250	UTF-16
Spanish (ESP)	1252	UTF-16
Swedish (SWE)	1252	UTF-16
Thai (THA)	874	UTF-16
Turkish (TUR)	1254	UTF-16
UK English (ENG)	1252	UTF-16
US English (AME)	1252	UTF-16

Additional languages including Serbian are maintained by Epicor partners and are available on request..

Database Changes

The structure of some tables in iScala database has been changed. In addition, some new tables have been added. For more details about DB changes, please see *PRD-S23-090-001_iScala 2.3 SR1 Database Changes.xls*, included in the product DVD.

File Changes

CHANGES IN DDF AND RPT TEMPLATES

The structure of some RPT templates has been changed in iScala 2.3 SR1. In addition, some new DDF codes have been added. The set of new VBA functions is implemented for converting the values of Double and Date type to the values of String type and vice versa. These functions are:

- ConvertDoubleToStr
- ConvertStrToDouble
- ConvertDateToStr
- ConvertStrToDate

If you have customized templates or plan to use newly implemented DDF codes, be sure to upgrade the corresponding templates, based on *PRD-S23-090-003_iScala 2.3 SR1 DDF and RPT Changes.xls* provided with the DVD release set.

CHANGES IN XSLT TRANSFORMATIONS, PROCESSES, AND SCHEMAS

The structure of some standard SCS transformations has been changed in iScala 2.3 SR1. If you have customized workflows, be sure to upgrade them based on *PRD-S23-090-004_iScala 2.3 SR1 XSLT and Schema Changes.xls* supplied in the DVD release set.

CHANGES IN VBA OBJECT MODELS

The structure of some VBA object models has been changed in iScala 2.3 SR1. In addition, some new VBA models have been added. If you have customized models or plan to use newly implemented VBA models, be sure to upgrade the corresponding models, based on *PRD-S23-090-005_iScala 2.3 SR1 VBA Object Model Changes.xls* provided with the DVD release set.

Product Distribution

Release Date

iScala 2.3 Service Release 1 was released for general availability in March, 2008

Version Compatibility

At the time of release, iScala 2.3 Service Release 1 is compatible with the following Epicor and third party solutions:

- Epicor Portal 8.2.5
- Epicor DBAudit 7.3.5
- Epicor BI Web Parts 8.2.1 or later
- iScala Storefront 2.3.3
- iScala Query Designer 6.9A or later (you will need iSQD 6.9B for MS SQL 2005)
- Crystal Enterprise XI R2 with SP1
- Crystal Reports XI R2 SP3
- Microsoft SharePoint Portal Services 2007
- Microsoft Office 2003 and 2007
- Microsoft Project Server 2007
- Microsoft CRM 4.0 (note: iScala integration to Microsoft CRM will not be included in the initial release of iScala 2.3 SR1. Integration is planned to be released soon after iScala 2.3 SR1, please contact an Epicor representative for more details)
- Microsoft FRx 6.7
- Microsoft Forecaster 7.0
- Forecast Pro 5 Unlimited
- Active Planner 7.3.6B
- Altec Doc-Link 2.4

Product Contents

The iScala 2.3 Service Release 1 pack consists of a two DVDs containing the iScala application and third party products, which are also available for download from the Epicor Release Library

ISCALA 2.3 SERVICE RELEASE 1 APPLICATION

The iScala 2.3 Service Release 1 application contains all application and server software listed in Supported Products and all languages listed in Supported Languages above, in addition to:

DATA DICTIONARY

iScala 2.3 Service Release 1 Data Dictionary is available through iScala Database Converter.

INSTALLATION PROGRAM

- iScala 2.3 SR1 Setup Program (32bit and 64bit)
- iScala 2.3 SR1 Client Setup Program
- Epicor Analysis System 8.2.1 Setup Program

- iScala Web Reporter 2.4.0 Setup program
- Epicor Portal 8.2.5
- iScala Content Pack for Epicor Portal 8.2.5
- Epicor DBAudit 7.3.5

RELEASE NOTES

- iScala 2.3 SR1 Release Notes
- iScala 2.3 SR1 Product Contents
- iScala 2.3 SR1 Database Changes
- iScala 2.3 SR1 List of fixed bugs
- iScala 2.3 SR1 DDF and RPT Changes
- iScala 2.3 SR1 XSLT, Schema Changes
- iScala 2.3 SR1 VBA Object Model Changes
- iScala 2.3 SR1 Installation and Upgrade Instructions
- iScala 2.3 SR1 Advanced Payroll Standalone Installation Guide
- iScala 2.3 SR1 Migration of SCS to SC
- iScala 2.3 SR1 Configuration and Tuning of iScala Installations

ISCALA 2.3 SR1 MANUALS

The iScala Manuals are located in `Readme\Manuals` directory on the DVD.

Please note that all manuals are available only in English. Manuals in PDF (Acrobat Reader) format are not included any longer. The following manuals are available in the CHM format:

- Asset Management User's Guide (am.chm)
- Contract Management User's Guide (cm.chm)
- Customer Relationship Management User's Guide (crm.chm)
- Country Specific Features User's Guide (cs.chm)
- iScala Database Converter (dbconv.chm)
- Direct Invoicing User's Guide (di.chm)
- E4SE Project Suite Integration User's Guide (e4se.chm)
- EMU Conversion User's Guide (emu.chm)
- Epicor Service Connect User's Guide (esc.chm)
- General Ledger User's Guide (gl.chm)
- Resource Management User's Guide (hr.chm)
- iScala Documentation Kit (iScala.chm)
- Market Database User's Guide (ma.chm)
- Material Production Control User's Guide (mpc.chm)
- Sales Order User's Guide (or.chm)
- Payroll User's Guide (pa.chm)
- Purchase Order User's Guide (pc.chm)
- Purchase Ledger User's Guide (pl.chm)

- Promissory Notes User's Guide (pn.chm)
- Project Management User's Guide (pr.chm)
- Stock Control User's Guide (sc.chm)
- iScala Administration Console User's Guide (ScaAdminConsole.chm)
- Epicor Service Connect Solution User's Guide (scs.chm)
- Sales Ledger User's Guide (sl.chm)
- Service Management User's Guide (sm.chm)
- Statistics User's Guide (st.chm)
- System Utilities User's Guide (sy.chm)
- Using Interface Designer User's Guide (uid.chm)
- VBA Developer User's Guide (vba.chm)
- "What's New" User's Guide (wn.chm)
- Advanced Payroll User's Guide (wpa.chm)
- Transition to Next Financial Year User's Guide (ye.chm)
- Configuring Portal Solution (WP.chm).

ISCALA 2.3 3RD PARTY PRODUCTS

All third party products are licensed separately. The iScala 3rd Party Products are located in the iScala 3rd Party Products directories of the DVDs and contains the following applications (licenses not included):

- Epicor Active Planner for iScala 7.3.6B
- Microsoft FRx 6.7
- Microsoft Forecaster 7.0
- iScala Query Designer 7.01
- iScala Cash Flow Analyzer 7.01
- Epicor BI Web Parts 8.2.1 SP1
- Crystal Reports Designer XI R2 SP2 and SP3
- Microsoft SQL 2005 Standard Edition (32bit and 64bit)
- Microsoft SQL 2005 SP2 (32bit and 64bit)
- Crystal Analysis Designer XI R2 with SP1
- Crystal Enterprise XI R2 with SP1
- iScala Storefront 2.3.3
- Microsoft Office SharePoint Server 2007
- Microsoft Project 2007 Professional
- Microsoft Project Server 2007
- iScala Mobile Service Management 2.14
- Forecast PRO 5.0 Unlimited and Collaborator
- BarTender 8.01

Installation

The detailed installation and upgrade instructions for iScala products can be found in PRD-S23-090-006_iScala Installation and Upgrade Instructions., available in the release DVD.

Recommended Software Configuration

Introduction

This section is not meant to provide complete system configuration specifications for all iScala implementations. Each customer environment is unique and therefore requires specific consideration of these differing factors. The following guidelines are provided only to assist our customers in planning the system environment to best support their iScala applications. They do not account for third-party applications or services, or for variations in applications used, user counts, transaction volume and geographic dispersion that will naturally affect system performance. For an overall system configuration analysis, contact your authorized consultant. These recommendations are subject to change.

The purpose of this section is to describe the supported and required software for iScala 2.3. SR1

Epicor Software Corporation reserves the right to change the requirements listed in the present document to comply with changes in technology or the discontinuation of support from required software by copyright owners. If a software vendor decides to discontinue one of the products listed as supported software by Epicor, the software is automatically discontinued as an iScala supported system. Software support is discontinued on the same date as the software vendor discontinues standard support for their standard retail product.

All software listed in the Software Requirements section of the present document has been tested for compatibility with iScala 2.3 SR1 Products in English only. Only localizations for which English is not explicitly stated in the present document, and that are listed as supported languages, are accepted.

Server Software

SUPPORTED OPERATING SYSTEMS

The following server operating systems are supported:

- Microsoft Windows 2000 Server (SP4 or above, unless otherwise stated when a new service pack or hotfix is released)
- Microsoft Windows 2000 Advanced Server (SP4 or above, unless otherwise stated when a new service pack or hotfix is released)
- Microsoft Windows Server 2003 Standard Edition (SP1 or above, unless otherwise stated when a new service pack or hot fix is released)
- Microsoft Windows Server 2003 Enterprise Edition (SP1 or above, unless otherwise stated when a new service pack or hot fix is released)

The following virtual machine software can be used to run the supported server operating systems:

- VMware GSX Server 3.2 for Windows (English version only)
- VMware Server 1.0.1 for Windows (English version only)
- VMware Workstation 5.5 (English version only)
- VMware Workstation 6.0 (English version only)

A distributed SQL Server location is supported for company databases, as well as for the system database and for system services. The functionality is subject to iScala license. Only one installation of iScala 2.3 administration services is supported per server.

REQUIRED SERVER SOFTWARE

The following program must be installed on the server:

- Microsoft Internet Explorer 6.0 (SP1 or above, unless otherwise stated when a new service pack or hotfix is released). Typical set of components.

SUPPORTED DATABASE MANAGEMENT SYSTEMS (DBMS)

The following database management systems are supported:

- Microsoft SQL Server 2000 (SP4 or above, unless otherwise stated when a new service pack or hotfix is released)
- Microsoft SQL Server 2000 Desktop Engine (SP4 or above, unless otherwise stated when a new service pack or hotfix is released)
- Microsoft SQL Server 2000 Analysis Services (English version with the latest available service pack. Optional for iScala OLAP and Advanced Payroll (budgeting))
- Microsoft SQL Server 2005 (SP1 or above, unless otherwise stated when a new service pack or hot fix is released)
- Microsoft SQL Server 2005 Express Edition (SP1 or above, unless otherwise stated when a new service pack or hot fix is released)
- Microsoft SQL Server 2005 Analysis Services (English version with the latest available service pack. Optional for Epicor Analysis System (Cubex))

The iScala Small Business Server can only be installed on a machine with Microsoft SQL Server 2000 Desktop Engine or Microsoft SQL Server 2005 Express Edition

Workstation Software

WORKSTATION OPERATING SYSTEMS

The following workstation operating systems are supported:

- Microsoft Windows 2000 Professional (SP4, unless otherwise stated when a new service pack or hot fix is released)
- Microsoft Windows XP Professional (SP2, unless otherwise stated when a new service pack or hot fix is released)
- Microsoft Windows Vista (GA unless otherwise stated when a new service pack or hot fix is released)

The following virtual machine software can be used to run the supported workstation operating systems:

- VMware Workstation 5.5 (English version only)
- VMware Workstation 6.0 (English version only)

Client software for iScala Windows Solution cannot be installed on Windows 9x and Windows Millennium workstations.

REQUIRED WORKSTATION SOFTWARE

The following software must be installed on the workstation:

- Microsoft Internet Explorer 6.0 (SP1 or above, unless otherwise stated when a new service pack is released). Typical set of components.

Remote Windows Solution – Additional Requirements

SERVER OPERATING SYSTEMS

For remote operations, the following server operating systems are supported:

- Microsoft Windows 2000 Server with Terminal Services
- Microsoft Windows 2000 Advanced Server with Terminal Services
- Microsoft Windows Server 2003 Standard Edition with Terminal Services
- Microsoft Windows Server 2003 Enterprise Edition with Terminal Services
- Citrix MetaFrame 1.8 for Windows 2000 Servers (English version only)
- Citrix Metaframe XP for Windows (XPs, XPa, XPe) (English version only)
- Citrix Presentation Server 4.5

If Unicode is not licensed, the default regional settings on the server for remote operations must be set to the same code page as the ANSI code page of the database. (This limitation is not applicable if a Unicode license is available.)

Service Connect – Additional Requirements

REQUIRED SERVER SOFTWARE

The following programs must be additionally installed:

- Microsoft Internet Information Services (IIS) 5.1 or higher (Common files and WWW Server are required, SMTP and FTP are optional)
- Microsoft Message Queuing Services (MSMQ) 2.0 (optional)
- IBM WebSphere MQ Server or Client 5.1 (or above) (optional) (English version only)
- SonicMQ v6.1 CSharp Client for Windows (optional) (unless otherwise stated when a new service pack or hotfix is released)
- In order to use Windows Communication Foundation/Windows Workflow Foundation-based functionality, Microsoft .NET 3.0 is required (supporting only Windows 2003 or newer on servers); otherwise .NET 2.0 is required
-

Advanced Payroll – Additional Requirements

We do not recommend using the Windows 2000 family products for the performance reasons.

REQUIRED SERVER SOFTWARE

The following programs must be additionally installed:

- Microsoft Internet Information Server (IIS) 5.1 (or above, unless otherwise stated when a new service pack is released)
- Microsoft COM+ 1.5 or above
- Microsoft MSXML Engine 4.0 (SP1 or above, unless otherwise stated when a new service pack is released)
- Microsoft .NET Components Framework (with ASP.NET) 2.0.50727 or above, unless otherwise stated when a new service pack is released.

Required Workstation Software:

- Microsoft Internet Explorer 6.0 (SP1 or above, unless otherwise stated when a new version or service pack is released)

Recommended Hardware Configuration

Introduction

This section is not meant to provide complete system configuration specifications for all iScala implementations. Each customer environment is unique and therefore requires specific consideration of these differing factors. The following guidelines are provided only to assist our customers in planning the system environment to best support their iScala applications. They do not account for third-party applications or services, or for variations in applications used, user counts, transaction volume and geographic dispersion that will naturally affect system performance.

All the requirements listed below assume that iScala is the only application running on the computer. More powerful hardware is required to run other applications on the same computer. For more information about hardware requirements or to get customized requirements for the size of your installation, please contact your local Epicor representative.

Any configuration that does not meet the hardware requirements outlined below is not supported unless approved by a local Epicor representative.

Hardware requirements are subject to change due to changes in the product and technology.

Server

HARDWARE REQUIREMENTS FOR COMMUNITIES OF UP TO 50 USERS

We recommend having separate dedicated servers for the iScala application and Microsoft SQL Server.

- Intel Core 2 Duo starting from 2.2 GHz or better
- 2 GB RAM or more (4GB is preferable but not mandatory)
- Hardware RAID-5 for OS, DBMS and iScala binaries (3GB for the DBMS and iScala installation)
- Hardware RAID-5 with 6 spindles for iScala databases (at least 1GB for the initial installation)
- Gigabit network connection
- DVD ROM drive

HARDWARE REQUIREMENTS FOR COMMUNITIES OF 50...250 USERS

We strongly recommend having dedicated servers for the iScala application and Microsoft SQL Server.

iScala Server:

- Intel Core 2 Duo starting from 2.2 GHz or better
- 2 GB RAM or more
- Hardware RAID-5 for OS and iScala binaries (3GB for iScala installation)
- Gigabit network connection
- DVD ROM drive

SQL Server:

- Intel Core 2 Duo starting from 2.2 GHz, Dual Core Itanium2 1.6GHz or better

- 4GB RAM or more
- Hardware RAID-5 for OS, DBMS
- Hardware RAID-5 with 6 spindles for iScala databases (at least 1GB for the initial installation)
- Gigabit network connection

HARDWARE REQUIREMENTS FOR COMMUNITIES OF **250...1000** USERS

Dedicated servers for the iScala 2.3 application and Microsoft SQL Server to support such load are necessary.

iScala Server:

- Intel Core 2 Duo starting from 2.2 GHz or better
- 2 GB RAM or more
- Hardware RAID-5 for OS and iScala binaries (3GB for iScala installation)
- Gigabit network connection
- DVD ROM drive

SQL Server:

- Two cores (Dual Core Itanium2 1.6GHz or better) per each 250 users
- 16GB RAM or more
- Hardware RAID-5 for OS, DBMS
- Hardware RAID-5 with 6 spindles for iScala databases (at least 1GB for the initial installation)
- Gigabit network connection

HARDWARE REQUIREMENTS FOR REMOTE OPERATIONS OF UP TO 20 USERS

We strongly recommend the use of a dedicated server for remote operations (Terminal Services or Citrix Presentation Server).

- Intel Core 2 Quad starting from 2.66 GHz or better
- 1 GB RAM per 10 users, but no less than 1 GB RAM
- Hardware RAID-5 for OS and iScala binaries (2GB for the iScala installation)
- Gigabit network connection

HARDWARE REQUIREMENTS FOR CONNECTIVITY AND PORTAL SOLUTIONS

Hardware recommendations for these solutions are as defined above. However, please ensure that the relevant solution works with the same database as the Windows Solution, acting as an additional virtual user.

Because of the multithreading capabilities of iScala, the processing of XML messages may result in an additional load on the server equivalent to 1-50 additional concurrent users, depending on the message load.

Windows Workstation

Recommended configuration:

- Pentium IV – 2 GHz or faster processor
- 1GB RAM
- 1024x768 screen

- 100 Mb network connection

When using VMware and VPC virtual machine software, the following additional hardware requirements apply:

- Pentium IV - 2.6 GHz
- 2 GB RAM

Advanced Payroll

We recommend using the following hardware for iScala Advanced Payroll Server under the following configurations:

CALCULATION OF UP TO 10,000 EMPLOYEES, SUPPORT OF UP TO 20 HEAVY ADVANCED PAYROLL USERS, SUPPORT OF UP TO 500 LIGHT ADVANCED PAYROLL USERS

- 4 x Intel Xeon MP 3.66 GHz
- 4 Gb PC2-3200 DDR II SDRAM
- 5 x 73Gb SCSI HDD in RAID level 5
- Integrated Broadcom 5704 Dual-port 10/100/1000 Gigabit Ethernet working in Gigabit mode

CALCULATION OF UP TO 4,000 EMPLOYEES, SUPPORT OF UP TO 10 HEAVY ADVANCED PAYROLL USERS, SUPPORT OF UP TO 200 LIGHT ADVANCED PAYROLL USERS

- 2 x Intel Xeon 2.88 GHz
- 2 Gb DDR I SDRAM
- 2 x 120Gb SATA HDD in RAID 1
- Intel PRO/1000 MT 10/100/1000 LAN adapters

DCOM Configuration

Configuration of security settings related to DCOM components is described in detail in the Epicor iScala DCOM configuration whitepaper that is distributed as part of the iScala install kit.

Security Configuration

Setting up security and access rights for iScala is described in detail in the online help files of iScala WinDS and the iScala Administration Console.

To improve security and usability, it is recommended to import Windows users into iScala, rather than to set up iScala internal users. The advantage of Windows authentication is that end-users do not have to remember additional passwords or sign on again in order to use iScala.

iScala should be set up to use SQL authentication rather than Windows authentication for connecting to the SQL server. If necessary, individual SQL accounts can be set up for each iScala end-user, so that database access can be tracked for each end-user. The end-users do not need to know the SQL username and password that iScala uses to connect to the SQL server – these are entered once into the iScala Administration Console by the system administrator.

If iScala is set up to use Windows authentication for connecting to the SQL server, then the Windows users need to be given access rights to the SQL server, which is a security risk. Windows users with SQL privileges can abuse their SQL access rights to connect to the SQL server using other applications than iScala (e.g. Excel, Access).

Sizing and Tuning for Performance

There is no generally accepted definition of what level of performance is good or sufficient. Performance requirements depend on the business environment. For end-users that enter quotations or sales orders while on the phone to a customer, it is important that iScala response time is as short as possible. For accountants that print month-end reports, speed is much less important.

Please also note the following:

- Performance can be gained by installing SQL Server and iScala on separate servers.
- Performance can be improved by installing Microsoft SQL Server on a load-balanced cluster rather than on a single server.
- Installing iScala Enterprise Server and utilizing native x64 bit operating systems will normally improve performance, in tests the benefits are most significant for environments where iScala back office users and Service Connect are executed concurrently.
- When distributing SQL and NT services over a number of separate servers, performance can be gained by linking up the servers via a gigabit network and by using dual Xeon servers with 4 GB of RAM or better.
- Reports can be very resource intensive, so it is recommended to use a separate server and database for reporting. Live data can be transferred to the reporting server as a scheduled task when system load is low, or if real time reports are required, using database mirroring. iScala does not support SQL Server replication.
- OLAP Cube-based reports are faster than database-based reports.
- A 100 Mbps recommended between workstation & server
- The Windows Performance Monitor (Start > Run... > PerfMon) can be used to isolate performance bottlenecks (CPU, memory, disk usage, network, etc.).
- Virus software may negatively affect system performance and should be switched off on the server or servers.
- Performance of the iScala windows client also depends on the specifications of the client machine.
- When using Citrix, Epicor Professional Services has established as a rule of thumb that a Citrix server can support up to 20 concurrent iScala users. Performance and other issues have been experienced by clients running more users per server, however every user should evaluate their own system usage when selecting what remote access software is required. Citrix claims significant performance improvement when using Citrix Presentation Server 4.4 and above on a 64-bit server. The bandwidth between the Citrix client and the Citrix server rarely causes performance problems, Epicor Professional Services has found that 15 kbps is sufficient for most users. Additional bandwidth may be necessary when users frequently print big reports.

Technical Support

Overview

Epicor's commitment to deliver high quality business solutions means that our customers depend not only on our applications, but also on our experience in supporting those solutions around the world. Epicor stands behind all of its products with a world-class technical support organization, capable of serving our global customer base.

We are able to offer this support through our worldwide Epicor support centers located in Orlando, Florida; Budapest, Hungary; Moscow, CIS; Dubai, UAE; and Kuala Lumpur, Malaysia. The support teams consist of certified application specialists who work alongside certified technical consultants. Further information, documentation, discussion forum and other useful resources are available on the Epicor Customer Web Site, <http://epicweb/epicor.com>

We strive to develop solid, long-term business partnerships with our customers. Epicor's support analysts are not only specialists in our products but they also understand the ongoing business needs of our customers. . . To ensure our staff are up-to-date they are regularly trained and monitored to ensure they pass our internal certification standards. Our goal is to continue to fine-tune and improve our support systems to enable us to provide the support you need to keep your organization as productive as possible. We continually monitor our performance with incident questionnaires as well as more general customer satisfaction surveys.

ADVANCED TECHNOLOGY

Epicor Technical Support uses advanced telecommunications technology to ensure you connect with the right person quickly to resolve your application related issues. When you call into any of our support centers, our Automatic Call Distribution System quickly routes your call to the appropriate support analyst. Our call tracking system gives our analysts instant access to your records and our extensive knowledge base of information, so they can quickly provide you with answers and solutions. Epicor Technical Support also utilizes the latest technology in troubleshooting tools such as WebEx™ to resolve tough customer issues in a timely manner. Our support centers cover over 20 languages, fluently, using native speakers where possible.

The Customer Center

Self-service support via the Internet can be challenging. That's why Epicor has designed a specific portion of our website for our Customers. Epicor's Technical Support Web site (epicweb.epicor.com) includes access to the latest software updates and patches as well as a discussion forum. Furthermore, we will soon be launching a secure, documented online-chat system to further improve our ability to answer your queries quickly, while allowing you to break off to work on other tasks while the chat session is underway.

PRODUCT DOWNLOADS

Product patches and service packs are regularly published to the Customer Center where they are available for download to customers with a valid maintenance contract.

New Technical Support Services Offerings for Epicor iScala

EXPANDED EVENING AND WEEKEND COVERAGE (BY APPOINTMENT ONLY)

Epicor's Technical Support realizes that many customers would like to contract for additional support coverage for specific planned system events, like upgrades, which fall outside the normal business weekday support coverage. For an additional fee, we can arrange for you to have access to a personal support contact, available over evenings or weekends, as long as this is scheduled well in advance.

Supported Products

Support for iScala 2.3 encompasses the following products:

iScala Servers

- Enterprise Server
- Business Server
- Small Business Server

iScala Products

- Financials
- Asset Management
- Sales Order Management
- Customer Relationship Management
- Commission Management
- Materials Management
- Warehouse Management
- iScala Collect (various products)
- Supply Chain Tools
- Requisition Management
- Sales Contract
- Purchase Contract
- Manufacturing
- Manufacturing Value Pack
- Advanced Manufacturing
- Service Contract
- Service Management
- iScala Service integration to Microsoft Project
- iScala Mobile Service
- Project Management
- iScala Project integration to Microsoft Project
- Standard Payroll
- Advanced Payroll (various products)
- Developer Tools (various products)
- iScala Enterprise Performance Management and BI (various products)
- Epicor Service Connect Platform and Integrated solutions (various products)
- Epicor Portal and content packs (various products)

Professional Services

Overview

Epicor's Professional Services organization helps mid-market companies implement a complete enterprise software solution, quickly and cost-effectively. By coupling its product suite with a large, well-trained Professional Services organization, Epicor makes implementing enterprise applications simpler by providing a single-stop solution for all customer needs.

In addition to Epicor's own professional services consultants, we partner with many Value Added Resellers (VARs). VARs are certified on Epicor products and even offer specialized implementation services for geographic markets or specific vertical markets.

Implementation Support

To help you achieve successful, live operation as quickly and as productively as possible, Epicor's professional services team employs an integrated consulting approach consisting of several fundamental principles.

TECHNICAL AND FUNCTIONAL EXPERTISE

The basis of our consulting success is a robust knowledge base concerning not only our products and how they function but also how you can utilize them most effectively to maximize the return on your investment. Our consulting organization is staffed with Microsoft-certified professionals, Visual Basic and SQL Server software programmers, and applications experts who have backgrounds in the industries we serve.

Consultants work with you to design your system, explain the functional and technical details of system processes, troubleshoot implementation issues, and concurrently, transfer our extensive knowledge to you.

CUSTOMER SOLUTIONS

Epicor's Professional Services organization has unmatched experience in implementing solutions that span customer relationship management, supplier relationship management, distribution, manufacturing, financial accounting, and enterprise services automation. The organization boasts a proven track record with thousands of successful implementations around the world.

As a leading provider of enterprise applications for the mid-market, Epicor's solutions are designed to be easy-to-implement, flexible and cost-effective. Through their significant industry experience and direct involvement with the products and technologies, Epicor's Professional Services organization can deliver tangible business results faster and more efficiently whether you are implementing a single location, or a worldwide deployment.

PROVEN IMPLEMENTATION METHODOLOGY

Our *Signature* implementation methodology is based on years of field experience implementing our products in hundreds of organizations and provides a compilation of approaches, instructions, techniques, templates and sample deliverables to facilitate implementation projects. The methodology acknowledges the architecture, technology, and personnel requirements for a successful implementation. It also recognizes the requirements for success and increases the chances of quickly and painlessly reaching implementation goals and objectives. It is also highly customizable to each customer's specific requirements, timetables, and resources. All Epicor consultants and project managers are trained and certified on the *Signature* methodology as the first step of the Epicor certification program.

UPGRADE SERVICES

Epicor Consulting offers complete upgrade services. By enlisting services from the consulting team, you will have access to the experience of many upgrades. Specifically, when

upgrading from Scala 5.1 version to subsequent versions of iScala, the Epicor consulting team can help you understand the extensive new features and functionality and assist you in both the technical aspects and the business process aspects. You will be provided with a set of consulting and training services to guide you along the fastest migration path in order to maximize the value of your upgrade.

ROI OPTIMIZATION PROGRAM

Epicor Professional Services has recently developed an exciting new program to provide our customers with post go-live support services: This program is the iScala ROI Optimization Program.

The main objective of the ROI Optimization Program is to ensure that your business systems remain highly optimized and fully leveraged. With business software, customers may initially implement only a partial amount of the overall available functionality. As priorities and functions change, customers may not realize all of the potential value inherent in their solution. Epicor consultants can help you maximize the return on your current system investment by assisting in the implementation of additional features that you might not be aware of. The intention of the program is to share best practices across our customer base and to ensure your business is getting everything possible out of your Epicor investment.

INTEGRATION SERVICES

Leveraging the Internet is not just about putting a catalog on a Web site. The Internet can fundamentally change the way a company does business, uses systems, and communicates with its customers, suppliers and partners. Epicor has been helping its customers connect their businesses to the Internet for years, and it understands the impact of it on our customers' businesses. As a result, Epicor has established a specialized Professional Services team that is focused on implementing e-commerce solutions.

Epicor's Integration Services team has the experience to implement Epicor systems, from electronic storefronts to supply chain integration to customer portals. Epicor consultants are experienced with protocols, security, virtual private networks, XML schema standards, Microsoft Site Server, Microsoft IIS, HTML, DHTML, ASP's, Scripting, Microsoft DNA and a host of other technologies necessary to link up to the Internet. More importantly, Integration Services understands all aspects of Epicor's customers' businesses so the team knows how to tie eBusiness systems with sales, marketing, finance, distribution and manufacturing systems to e-enable an entire business – not just a Web site.

HOSTING SERVICES

Epicor designs "total solutions" one customer at a time. It's a "configure-to-order" philosophy which tailors every solution to the specific needs of the customer. Epicor Hosting Services provides a wide range of offerings to configure, host, manage, and monitor the server and network environments of our customers. These offerings provide complete hardware, connectivity, and accessibility within a secure environment. For many of our customers, we are the sole organization responsible for managing their entire Enterprise Application Environments. This includes not only their Enterprise Resource Planning (ERP) systems and related software, but all applications that are deployed enterprise-wide.

MANAGED SERVICES

Epicor provides application management to mid-size businesses across a range of industries. We pride ourselves on being the "single point of accountability" for our customers' environments. So, regardless of the application on which your business is powered, Epicor provides customized, high quality remote application management.

Epicor's experienced technicians work in an environment optimized to make use of all of the experts within our company. This ensures higher quality services and offers improved efficiency. All of this means lower costs and less risk for you. This offering includes application and database administration, operating systems and network administration, business process outsourcing and around-the-clock support.

Global Presence

Our regional consulting resources combined with a world-wide partner channel enable Epicor to effectively deliver services when and where you need them. Regional consulting offices are based in our North America, Latin America, EMEA and Asia Pacific regions.

Product Education

Epicor's Product Education department is pleased to provide a comprehensive set of educational resources to help you understand iScala.

Who Benefits From Education?

Everyone. The comprehensive educational resources that accompany Scala benefits every Scala user: New users, help desk technicians, analysts, support representatives, consultants – everyone!

Education plays a vital role in any implementation. Your organization will realize the greatest benefit when your employees have a deeper understanding of the software solution, enabling them to make their lives at work easier and more productive. At Epicor, we can help your employees gain this understanding through our Education programs.

Our Education Team draws from a wide range of academic and business experiences. The team is made up of experts in their field and the application of Epicor software, who effectively tie structured learning experiences to real world business challenges. Our goal is for you to come away from every learning experience with a basic foundation of knowledge and the enthusiasm to further develop your understanding.

How Do I Get Started?

Visit [EPICweb|Epicor Learning!](#) EPICweb|Epicor Learning provides the latest and most innovative methods of delivering education content to you.

EPICweb, Epicor's secured support site, is the central point of contact between Epicor and customers, partners, and peers. Epicor Learning, via Web services, is fully integrated to EPICweb. As a result, by accessing Epicor Learning via EPICweb, you need only a single login for all Epicor services and training content.



To access EPICweb|Epicor Learning, go to <http://www.epicor.com> and click on Support Login. You will then be prompted for your EPICweb username and password. Once on EPICweb, click on Scala, your product-specific Education page to start your education journey!


Epicor Learning manages training content for all Epicor products and provides a single convenient location for customers to:

- View education announcements
- Download curriculum roadmaps
- Find product-specific educational content
- Register for courses on Epicor's expanding list of classroom training options
- Track and report individualized training progress

- View feature summaries

What Resources Are Available?

Epicor offers a variety of learning methods to suit your individualized needs and schedule.

- Instructor-led classroom training is one option. For your convenience, these are conducted at one of Epicor's training centers, at your organization, or over the Web.
- A flexible and cost-effective way to train employees is through Web-based trainings. Your employees benefit from instructor expertise without the expensive travel or extended time away from the office. These trainings are available 24 hours a day, 7 days a week. All you need is two hours dedicated to learning.
 
- Epicor believes in a train-the-trainer approach. That is why we offer a self-paced option for all of our new courses for release 2.3 and beyond. Self-paced packages include the student manual, the instructor manual, and the online course in the same format Epicor instructors use to deliver courses. This gives you a flexible way to handle further training of your employees in-house in a cost-effective manner. NOTE: Some of these courses will also be available as eLearning recordings. A spin on Web-based trainings, eLearning recordings lets you see and hear an instructor conduct product demonstrations.
- A Feature Summary provides a high-level overview of the major new capabilities contained in each release or service pack. It provides a general explanation of enhancements.
- The iScala User Guide, a four-color 280 page book, explains iScala's functionality with specific examples for users to follow in the product. It is more detailed than the Feature Summary, but still high-level enough to give a beginner a very good grasp of the system as a whole.

Does Education Provide Certification?

Certainly. The Scala Education team also makes available a Certification program to be able to measure and categorize the level of knowledge of individual users whether they are Epicor employees, partners, or customers. Four specific tracks are available – application consultant, application support, technical consultant, and technical support. Certification is awarded to individuals who have passed a series of tests.

Where Do I Go For More Information?

Visit [EPICweb|Epicor Learning](#). You can also contact professional services or your account manager for details about subscription programs.

User Groups

Epicor user groups have been organized throughout the world. These user groups provide opportunities for our customers to share experiences and ideas with each other and with the Epicor product marketing and product management teams. The feedback from these groups positively influences our products, our partner relationships and our services.

USER GROUP LEADERSHIP COUNCIL

The Epicor User Group Leadership Council (EUGLC) consists of representatives from all Epicor product lines. The purpose of the leadership council is to represent the customer base and assist Epicor in being responsive to its customers' needs. The council has the opportunity to influence product development plans and customer support procedures to ensure that both our software products and our services meet our customer needs.

The User Group Leadership Council submits a prioritized list of issues and product enhancement requests to product management. Epicor then reviews these requests with the EUGLC in the form of a product summit. Product Summits consists of members of the EUGLC, key customers, and representatives from Epicor product management, product marketing and technical support teams. Ultimately, the agreed upon software fixes and enhancements are scheduled for incorporation into the future product releases.

It is important to note that we will continue to address issues reported by individual customers directly to technical support. However, the User Group Leadership Council has the unique opportunity to actively participate in Epicor's release planning and prioritization process.

