

Frequently Asked Questions (FAQ)

Epicor ERP 10.1.600 and Future Releases
of Epicor ERP: Migrating from Altec to
Epicor APR or Epicor APR with DocStar

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Introduction

This document provides an overview of the policy and process to inform and assist Epicor ERP customers that are also using Altec. Our objective is to define the plan for enabling a smooth transition for customers who move from Altec to Epicor Advanced Printing Routing (APR) or Epicor APR with the DocStar integrated solution, depending on the Altec modules used.

In January 2017, Epicor acquired DocStar, a leading enterprise content management (ECM) solution provider. Helping businesses translate vision into action for more than 20 years, DocStar delivers a flexible and innovative ECM and process automation platform. Easy to implement and use—both in the cloud and on premises—DocStar proven technology and global process expertise empowers organizations to operate at peak performance, navigate change, and grow.

DocStar customers gain control over documents, improve retention and increase efficiency with the ability to capture, store and manage any document, from any location, on any device. DocStar's experience in providing powerful integrations with various ERP solutions, accounting systems or other line of business applications gives companies an even better return on investment. Deeper business insights empower users to make smart decisions that positively impact the bottom line.

Nearly 2,000 organizations trust DocStar to deliver smart technology to reduce costs, improve productivity and allow for better business insight. DocStar customers represent every industry including insurance, financial services, healthcare, real estate/property management, manufacturing, legal, non-profit, education, banking/financial institutions and the public sector.

DocStar integrated with ERP 10.1.600 and future versions is now available for Epicor ERP customers.

We encourage customers to make the transition to DocStar for the following reasons:

- ▶ The DocStar solution is more comprehensive, providing an all browser-based UI, a simplified user experience, and a well-integrated single platform for capturing, storing, retrieving, collaborating, viewing/annotation, scanning of content, as well as intelligent data capture, version control, security, search engine-like document search capabilities, retention management, drag and drop graphical workflow and electronic form designers.
- ▶ Now that DocStar is part of Epicor, there will continue to be coordinated development and innovation with respect to future Epicor ERP releases for tighter integration between the solutions.
- ▶ With DocStar, you have the choice between a cloud or on-premises deployment with the same functionality.
- ▶ A tight integration between ERP and ECM solutions is key for a seamless user experience. DocStar and Epicor ERP 10.1.600 are now (and subsequent versions of Epicor ERP will be) tightly integrated for document attachment management functionality (Epicor APR and Epicor APR with DocStar to store/retrieve documents from Epicor ERP 10). DocStar AP automation processes invoices through the DocStar workflow to validate and match against Epicor ERP 10.1.600 data in real time and raise exceptions when needed before automatically creating invoice records in Epicor ERP 10.1.600. Using DocStar workflows, electronic forms, and scanning, various other processes within your organization can be streamlined and automated to expand the usage of the DocStar solution suite.
- ▶ DocStar is Epicor's only go forward integrated ECM and AP automation suite for Epicor ERP.

Frequently Asked Questions: Epicor ERP

I am an existing Epicor ERP Customer on a version older than Epicor ERP 10.1.600 (i.e. Vista/Vantage, E9, E10.0, E10.1.400, or E10.1.500), and I am also currently using Altec. Will Epicor continue to support the Altec interaction with Epicor ERP?

Yes. Epicor will continue to support current customers on the older versions of Epicor ERP with Altec, including the interaction between the products – there is no change in the support policy for the older versions mentioned in the question at this time. Existing customers with Altec may continue to license additional Altec seats/licenses. Please contact your Epicor account manager for additional information.

What version of Epicor ERP is DocStar integrated with?

DocStar is integrated with Epicor ERP 10.1.600, 10.2.100 and will be integrated with future Epicor ERP versions. At this time, there is no DocStar integration with any Epicor ERP version older than Epicor ERP 10.1.600, and any such usage would be on a DocStar stand-alone basis, therefore not integrated with Epicor ERP.

I am an existing Epicor ERP/Altec customer and am planning on upgrading/migrating to Epicor ERP 10.1.600. Which ECM solution should I use: Altec or Epicor APR or Epicor APR with DocStar?

Any Epicor ERP/Altec customers that move to Epicor ERP 10.1.600 must immediately contact their respective Epicor account manager to discuss and create a plan for a simultaneous transition/migration to Epicor Advanced Printing Routing (APR) or Epicor APR with the DocStar integrated solution, depending on the Altec modules used. While we will support Epicor ERP/Altec customers on the 10.1.600 release for a limited time, Epicor APR and DocStar are our go forward integrated ECM solutions for 10.1.600 and beyond.

I am an existing Epicor ERP/Altec customer and I am already on ERP 10.1.600. Which ECM solution should I use: Altec or Epicor APR or Epicor APR with DocStar?

Our Epicor ERP/Altec customers that are already on ERP 10.1.600 must immediately contact their respective Epicor account manager to discuss and create a plan for a transition/migration to Epicor Advanced Printing Routing (APR) or Epicor APR with the DocStar integrated solution, depending on the Altec modules used. While we will support Epicor ERP/Altec customers on the 10.1.600 release for a limited time, Epicor APR and DocStar are our go forward integrated ECM solutions for 10.1.600 and beyond.

I am an existing Epicor ERP/Altec customer and am planning on upgrading/migrating to a future version of Epicor ERP (i.e. Epicor ERP version higher than 10.1.600 such as 10.2 or higher). Which ECM solution should I use: Altec or Epicor APR or Epicor APR with DocStar?

Any Epicor ERP/Altec customers that plan to migrate to a future version of Epicor ERP must immediately contact their respective Epicor account manager to discuss and plan a simultaneous transition/migration to Epicor Advanced Printing Routing (APR) or Epicor APR with the DocStar integrated solution, depending on the Altec

modules used. While we will support Epicor ERP/Altec customers on the 10.1.600 and future releases for a limited time, Epicor APR and DocStar are our go forward integrated ECM solutions.

How long will Epicor ERP 10.1.600 or any future versions of Epicor ERP support Altec?

1. Altec support will end by October 31, 2018 for the Epicor ERP versions of 10.1.600 (and any derivatives of it) and the future versions of ERP (and any derivatives of these ERP versions). All Altec customers on these versions of Epicor ERP must transition to APR or APR with DocStar package prior to October 31, 2018.
2. Altec will continue to be supported for the older versions of Epicor ERP (Epicor ERP 10.1.500 or earlier). There is no change in the support policy for the older versions of ERP at this time.

To make the transition smoother for customers moving to Epicor ERP 10.1.600 or later versions of Epicor ERP, or for those that have already moved to 10.1.600, Altec will be supported for 10.1.600 and future releases through the end of October 2018. All Epicor ERP 10.1.600 customers with Altec must contact their respective Epicor account managers immediately to discuss and plan for a transition to Epicor Advanced Print Routing (APR) or Epicor APR with DocStar, depending on the Altec modules used. Epicor APR and DocStar are our go forward integrated ECM solutions for 10.1.600 and beyond.

Customers that are already on Epicor ERP 10.1.600 or moving to 10.1.600 or future releases with Altec must sign a “like for like” Altec to Epicor APR or Epicor APR with DocStar transition add-on order form, along with the associated statement of work (SOW) from Epicor Professional Services (PS) by working with their respective Epicor account manager. With the signed SOW, the Epicor PS team will work with the customer to transition from Altec to DocStar based on mutual scheduling and an agreed-upon timeline. Customers with a signed SOW to transition from Altec to Epicor APR or Epicor APR with DocStar will continue to be supported on Altec while the Epicor PS team helps transition the customer.

I am an Epicor ERP customer using Altec. Why should we transition to DocStar when upgrading/migrating to Epicor ERP 10.1.600 or future versions of ERP?

We encourage Epicor ERP customers on releases 10.1.600 or moving to 10.1.600 or 10.2.100 that are also using Altec to migrate to DocStar for a number of reasons:

- ▶ The DocStar solution is more comprehensive, providing an all browser-based UI, a simplified user experience, and a well-integrated single platform for capturing, storing, retrieving, collaborating, viewing/annotation, scanning of content, as well as intelligent data capture, version control, security, search engine-like document search capabilities, retention management, drag and drop graphical workflow and electronic form designers.
- ▶ Now that DocStar is part of Epicor, there will continue to be coordinated development and innovation with respect to future Epicor ERP releases for tighter integration between the solutions.
- ▶ With DocStar, you have the choice between a cloud or on-premises deployment with the same functionality.
- ▶ A tight integration between ERP and ECM solutions is key for a seamless user experience. DocStar and Epicor ERP 10.1.600 are now (and subsequent versions of Epicor ERP will be) tightly integrated for document attachment management functionality (Epicor APR and Epicor APR with DocStar to store/retrieve documents from Epicor ERP 10). DocStar AP automation processes invoices through the DocStar workflow to validate and match against Epicor ERP 10.1.600 data in real time and raise exceptions when needed before automatically creating invoice records in Epicor ERP 10.1.600. Using DocStar workflows, electronic forms, and scanning, various other processes within your organization can be streamlined and automated to expand the usage of the DocStar solution suite.

- ▶ DocStar is Epicor’s only go forward integrated ECM and AP automation suite for Epicor ERP.

Under our new Epicor APR or APR with DocStar migration program, existing Epicor ERP/Altec customers that are subscribed to the maintenance are eligible to receive “like for like” Epicor APR or Epicor APR with DocStar exchanges of solution at an attractive discounted license price. Additional users, modules or functionality outside of the “like for like” package will be offered under standard Epicor APR or Epicor APR with DocStar license pricing. Please contact your Epicor account manager to discuss the details.

What are the go-forward maintenance and support costs for migrating to DocStar?

Maintenance and support for Epicor APR and Epicor APR with DocStar is priced at 20% of the list price for the underlying package/configuration.

- ▶ “Like for like” migration. Migrating customers will be credited for any unapplied, prepaid maintenance and support for the Altec product against maintenance and support due for the “like for like” Epicor APR or Epicor APR with DocStar products. For example, if a customer paid \$1,200.00 in annual maintenance and support for the Altec product, and has 6 months remaining at the time of migration, the customer will have a \$600.00 credit towards the new maintenance and support fees payable for the “like for like” Epicor APR or Epicor APR with DocStar maintenance and support subscription. This is **NOT** a discount, but rather a credit for funds already paid.
- ▶ Additional Epicor APR or DocStar users/modules. A migrating customer is responsible for maintenance and support fees applicable for the license of any additional Epicor APR or DocStar users and modules beyond the “like for like” migration at the standard Epicor APR and DocStar list price.

If the credit is more than the new maintenance i.e., the new maintenance calculated for the remainder part of the existing maintenance contract – the customer does not need to pay anything for the remainder part of the contract. However, the customer is not eligible for a refund.

What kind of consulting services does Epicor offer for transitioning from Altec to DocStar?

Given the nature of the different types of data models, and the business rules for managing report print and routing rules between Altec and Epicor ERP, there is not a complete automated data/solution migration tool set for migrating from Altec to Epicor ERP integrated with Epicor APR or Epicor APR with DocStar. As part of the “like for like” migration analysis, an Epicor/DocStar Professional Services team member will provide an SOW for the re-implementation of the Epicor APR or Epicor APR with the DocStar integrated project.