

APR Enhanced (Advanced Print Routing) with Epicor ECM (DocStar®)

Enhanced Print Routing With Document Archiving and Supplemental Attachments

Creating, personalizing, and routing business documents and reports for various internal and external individuals—and meeting their unique needs for delivery, depth of information, and the desired format—can be a challenge, especially if you have to rely on a separate application outside your ERP system.

Your customers, suppliers, and internal users all have different reporting and document requirements. Some may need documents e-mailed as an attachment or deposited into a designated folder for FTP delivery. Others may still need printed copies. Information needs vary from customer to supplier, as well as between internal roles.

Epicor Advanced Print Routing (APR)

Providing important business documents and reports to the right people at the right time with the right information is complex enough without having to manage a non-integrated, third-party application. Now, you can have robust reporting functions for document distribution via printing and e-mail attachments built right into your ERP system with Epicor ERP Advanced Print Routing (APR).

Epicor APR offers built-in, easy-to-use tools to quickly create, route, and format your reports according to the various requirements of internal and external recipients. You can send order confirmations or invoices to customers, generate and submit required financial reports, and deliver parts reports or pick-lists to your operations personnel.



Epicor® ERP

Robust built-in ERP print and document report routing management

Easy-to-use graphical workflow for document print and routing rules design

Epicor enterprise content management (ECM), formerly known as DocStar ECM, integrated with ERP

Automatic document archival and version control in Epicor ECM (DocStar) from forms, reports, and files uploaded to or printed from ERP

Document type mapping between ERP tables and Epicor ECM (DocStar) for easy document searching

Epicor APR has flexible report printing rules that determine how the report output generates, prints, and distributes. The rules you define can be simple, such as creating an alternate report style users can run when they need to print a report using a unique format. More complex rules can define when Epicor APR divides a single report run into multiple dataset partitions that can link to separate workflow rules to generate, print, preview, and send the various reports. Even though the data generation for the report processes once, you can render multiple reports from the same data based on the audience, business requirements, and other factors.

APR Enhanced—Epicor ERP integration with Epicor ECM (DocStar)

Standard business practices may require you to track the documents and reports you send to recipients for things like customer inquiries, legal matters, or audit needs in the future. Epicor APR Enhanced can archive the documents generated as the invoices, sales orders, purchase orders, and other important documents for quick retrieval. Epicor APR Enhanced also allows you to easily send additional or supplemental documents with orders, invoices, or other reports. For example, drawings for parts referenced in a purchase order, a company privacy statement, standard disclosure statements, and other relevant materials can all be included in one APR delivery.

Benefits

With Epicor APR Enhanced and Epicor ECM (DocStar), your organization can reduce reporting errors, improve customer satisfaction, and eliminate the hassle of supporting additional applications. You can benefit from an integrated print management solution and document attachment management from within ERP that includes features designed to deliver:

- Cost and time savings—The functionality is built right into the ERP system and tightly integrated with Epicor ECM (DocStar), so you simplify your software and hardware infrastructure by eliminating the expense of managing any third-party print management tool.
- Ease of use—A modern graphical workflow builder within Epicor ERP allows you to quickly and easily design rules for report breaking, filtering, and assigning alternative report styles. You can also archive documents and design rules to seamlessly include supplemental document attachments from ERP tables with flexible selection rules. Upload, attach, and access any document from the ERP user interface within the right context.
- Flexibility and improved efficiency—Generate report data once and render multiple outputs and formats based on audience, business requirements, and other factors. An individual report run can be “broken” into multiple reports, each with different report styles and formats applied, and then delivered to one or more e-mail addresses or printers. Easily deploy rules-based supplemental document attachments and document archival processes for outbound reports.

Key features of Epicor APR

- Break down reports based on key data elements
- Use varied delivery methods (e-mail, print, and preview) and varied report formats for each report recipient
- Apply alternate styles to the output based on criteria within the report data
- Apply data filters to restrict reports to specific groups of data for different recipients
- Choose from multiple output methods, such as preview, print, generate, zip, and e-mail
- Access various print formats, including PDF, EMF, Word, and Excel
- Personalize report data in e-mails, including the subject line
- Support different SSRS report style definitions within a single report run

Key features of Epicor APR Enhanced with Epicor ECM (DocStar) integration

- Upload documents and attach to various ERP tables, such as parts, sales orders, purchase orders, and company all from within ERP user interface
- All attached documents are stored and version controlled seamlessly in Epicor ECM (DocStar)
- Access any attached document from the ERP system within the right context
- Archive and version control APR-generated documents into Epicor ECM (DocStar)
- Attach additional supplemental documents from various ERP tables to the outbound APR reports
- Document type mapping between ERP tables and Epicor ECM (DocStar) for easy document searching with the easy-to-use Epicor ECM browser interface

Sample—Epicor APR Enhanced with Epicor ECM (DocStar)

The example on the next page shows a sales order report broken by order number. In this example, a copy of the outbound sales order is attached to the sales order table in Epicor ERP and stored in the Epicor ECM (DocStar) repository via the “Add DocStar Attachment” design element. The workflow iterates through each part of the sales order to pick up supplemental attachments based on the criteria entered in the “Take DocStar Attachment” rule element, and a second “Take DocStar Attachment” rule element picks up the attachment from the company level and e-mails all the documents to the customer.

The screenshot displays two windows from the Epicor DocStar application. The top window, titled 'Breaking and Routing Rule Designer', shows a flowchart for a 'Sales Order Acknowledgment / E-mail and Capture Sales Order / OrderHed' process. The flow starts at 'Start', goes to 'Break 0', and then branches into 'Add DocStar Attac' and 'Send E-Mail 0'. The bottom window shows the 'Epicor ECM (DocStar)' interface. The left sidebar contains navigation options like 'Inboxes', 'Routing Actions', 'Alerts', 'Workflows', 'Approvals', and 'Recent Documents'. The main area shows search results for 'Items & Locations' with a table of documents. The right sidebar displays a 'Sales Order Acknowledgement' form for 'Sales Order: 5608', including contact information and a table of order lines.

Line	Part Number	Description	Qty	Order Qty	Unit Price	Ext. Price	
1	025-1223	Item 1223		10.00 EA	34.5011	345.00	
						Line Total	345.00
						Total Tax	0.00
						Line Miscellaneous Charges	0.00
						Order Miscellaneous Charges	0.00
						Order Total	345.00

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