EPACCSYS
ERP SOLUTIONS & SERVICES

G-CLOUD 10 SERVICES DEFINITION

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CONFIDENTIALITY

The following proposal has been prepared to provide information on Epicor Software, the Epaccsys Ltd approach to implementing a computer solution and the Epicor Corporation.

The information contained herein is considered confidential and proprietary and is intended solely for use in the evaluation of Epicor Software and its products. The information contained herein shall not be disclosed, in whole or part, to any third party including other employees not participating in the evaluation of this proposal. That data shall be maintained with the same degree of care the above named company uses to maintain its own confidential information. Epaccsys Ltd reserves the right to ask for the return, at its discretion, of any and all materials furnished in conjunction with this proposal.

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Introduction to G-Cloud Service Definition

Epaccsys and Epicor 10 ERP

Epaccsys Limited provide software, implementation services and customer support for Epicor products. Epicor delivers a fully integrated solution built within a single business platform that enables organisations worldwide to conduct business without barriers today and empowers them for greater success, efficiency and productivity tomorrow. This function is provided in an easy to use and flexible secure online system available anytime, anywhere.

Epicor ERP 10 is global ERP software system released in November 2008. This was a completely new application and one of the biggest software releases from Epicor in more than 10 years. Epicor 9 and 10 brought together the best of more than 25 years of experience and customer feedback with leading Microsoft technologies. This was recognised in the software industry with Gartner describing Epicor 10 ERP as "visionary" and Microsoft (see below) awarding Epicor the 2009 "Global Independent Software Vendor of the Year" title. This means that as Epicor 10 ERP is at the start of its life and you can expect to use Epicor 10 ERP without major upgrades for the next 10 plus years.

Gartner

"Few other traditional MSB ERP vendors can claim the same breadth of solutions as Epicor, with solutions that extend from core enterprise resource management to customer and supply-side activities... complemented by a full range of services, providing **single point accountability** to promote **rapid ROI and low TCO.**

Robert Anderson,

Sr. Analyst. Gartner Group

Microsoft

"Epicor is leading the charge among midmarket enterprise software vendors in helping its **customers maximize IT investment and achieve low total cost of ownership benefits** through the Microsoft platform..."

Eric Rudder

Senior Vice President Microsoft

"Epicor released Epicor 10 ERP, which, through its use of modern technology, places it as the most visionary and complete offering in the market." Source Gartner

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The Organisations

Epaccsys Limited

Epaccsys is the most experienced Epicor partner in Europe, having enjoyed continual growth since formation in 2001. Key to the success of Epaccsys is the experience and skill of the staff. Staff turnover is low and many staff have 15 years' plus experience of Epicor implementations.

Implementations are delivered by experienced project managers via a tried and tested implementation methodology that contributes to implementations being delivered on time and on budget. This has successfully delivered projects throughout the UK, Europe and the rest of the world.

Epaccsys provides full support services via telephone and remote access. The Support procedure is fully computerised and enables effective contact to be maintained with clients.

Epaccsys are able to provide one-stop, single call, support capability with local call-out of trained individuals as necessary. This service may be tailored to meet any special requirements that you may have. Additional support can be provided by Epicor in the UK, Asia, US and Russia to provide a very experienced pool of resource to effectively deal with support issues.

Epaccsys has been in business since 26th April 2001.

Epaccsys Consulting Services

Epaccsys Consulting organisation helps organisations to implement a complete enterprise resource planning (ERP) solution quickly and cost effectively. By coupling the Epicor product suite with our experienced well-trained Professional Services organisation we make implementing enterprise applications simpler by providing a single-stop solution for all customer needs.

Epaccsys Consulting provides a variety of services around implementation, assessments, process improvement, and software customisation. Our consulting services' objective is to implement and rollout systems on plan, within budget, and optimised for your environment. Our consulting teams offer local know-how coupled with a global outlook to ensure tangible results for our customers anywhere in the world. Always with a focus on profitable growth and long-term business success our consulting services span the following areas:

Implementation Services

Using our proven methodology our consulting team provides consistent, customer-focused implementations of Epicor ERP solutions;

Business Process Consulting

With extensive experience of implementing Epicor solutions we are able to provide consulting services aimed at aligning the Epicor software with a combination of your current and best practices;

Performance Workshops

Assisting you in identifying your key performance indicators, metrics and objectives and putting into place recording mechanisms to monitor performance throughout your systems lifecycle;

Upgrade Services

The provision of expert guidance to seamlessly move between versions of Epicor.

Custom Solution Development

Customer specific, designed and developed software applications.

Epicor Software Corporation

For a quarter of a century, Epicor has been a recognised leader dedicated to providing integrated enterprise resource planning (ERP) software solutions to companies around the world. Epicor has extensive experience in providing industry leading solutions for mid-sized companies and subsidiaries of large multinationals. With over $1bn dollars in revenue Epicor is a global leader, delivering business benefits to more than 35,000 customers in 150 countries. Epicor leverages innovative technologies like Web services in developing end-to-end, industry-specific solutions that enable companies to immediately drive efficiency throughout business operations and build competitive advantage.

With the scalability and flexibility to support long-term growth, Epicor solutions are complemented by a full range of services, providing a single point of accountability to promote rapid return on investment and low total cost of ownership.

Epicor offers a seamless end-to-end solution that actively exploits the latest technological advancements for our customers today, but with an eye to the future proofing of their solution investment. Our commitment to enhancing our solution to ensure our customers can continue to derive ongoing Return on Investment (ROI) is highlighted by many significant global commercial firsts:

- First accounting package developed for local area networks (LAN);

- First financial solution for Windows-based client/server;

- First financial, project accounting and distribution solution to be certified for all Microsoft BackOffice Servers;

- First Microsoft-based enterprise solution to leverage XML for enterprise application integration (EAI);

- First enterprise solution to use Microsoft OLAP Services;

- First enterprise vendor to release a Microsoft .NET CRM solution;

Epicor 10 ERP is built for enterprising companies, meeting your business requirements today with the flexibility to accommodate unforeseen opportunities in the future. Innovative technologies from Epicor pave the way for you to break down the barriers and streamline business processes while remaining agile for rapid response to customer initiatives.

Functionality

Epicor 10 ERP is a powerful yet easy to use system helping to run organistions worldwide. With many tools Epicor 10 ERP has the breath of functionality to meet the majority of your requirements and can provide additional tools and applications to provide you with the capability to continually enhance the solution in the future for each of your departments or divisions.

Epicor - Business without Barriers

Epicor 10 ERP

The fundamental difference between Epicor and other software vendors is that Epicor offers enterprise-class functionality – normally found in far more costly and expansive products – at a real mid-market cost of ownership. We do this by providing everything your business needs to automate and optimise operations.

Epicor focuses on end-to-end single source industry solutions; our ERP solution is inherently integrated and built as a single solution on a powerful business architecture. Because of this approach, Epicor 10 ERP offers a degree of functionality rarely found in other mid-market offerings.

Next Generation Enterprise Applications

Epicor 10 ERP is a comprehensive suite of enterprise applications that will help you optimise performance across the business. Epicor 10 ERP represents the culmination of the Epicor protect, extend, converge strategy, by effectively combining the strengths of nine ERP solutions and over twenty years of application development into a single solution that delivers world-class functionality. A complete end-to-end resource based on more than a dozen modular business suites, Epicor 10 ERP places significant emphasis on embedded capabilities, like customer and supplier relationship management, efficient order processing, extensive inventory management, streamlined fulfilment processing and support for global trade standards. The full suite comprises the following application groups
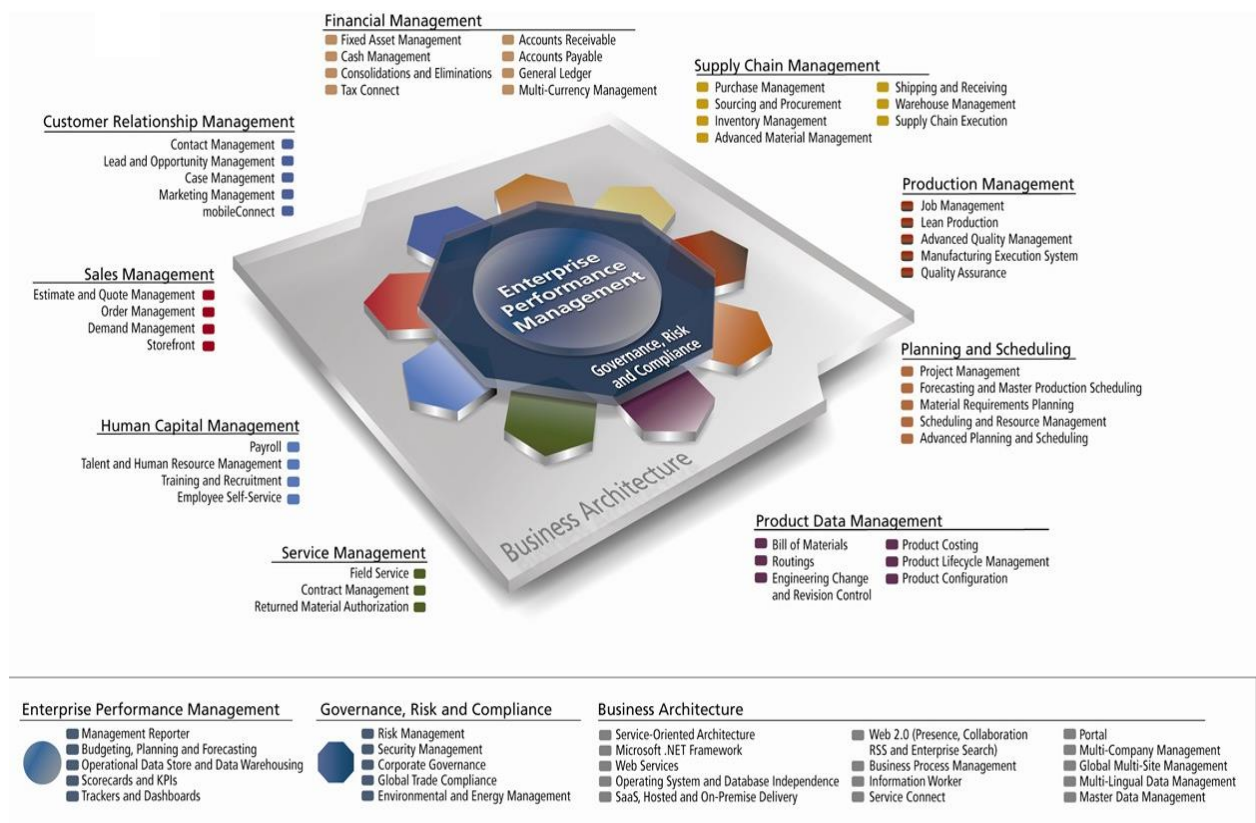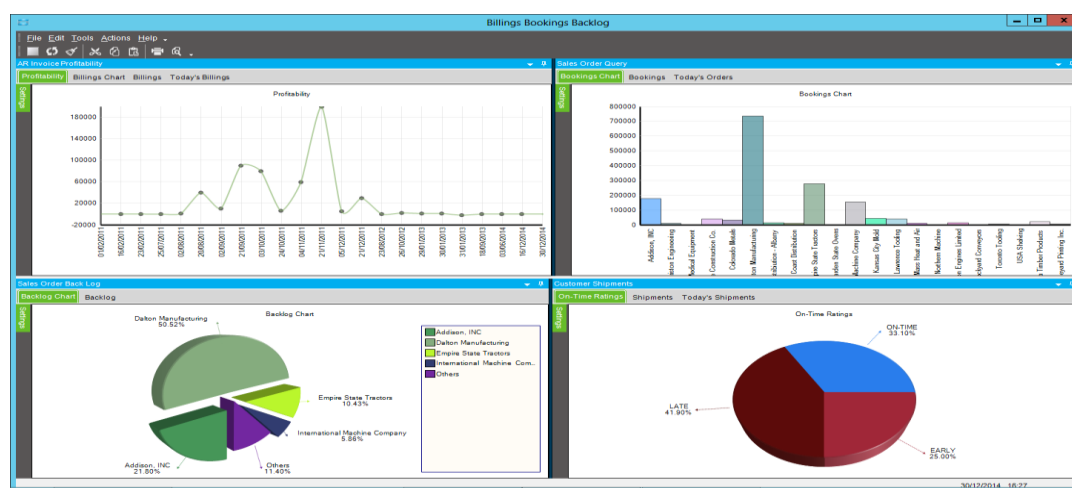
With a completely modern interface available on any device the Epicor solution comprises (but not limited to) some of the functional modules listed below

- ➢ **Financial Management**
- ➢ **General Ledger**
- ➢ **Accounts Payable**
- ➢ **Accounts Receivable**
- ➢ **Bank & Cash Management**
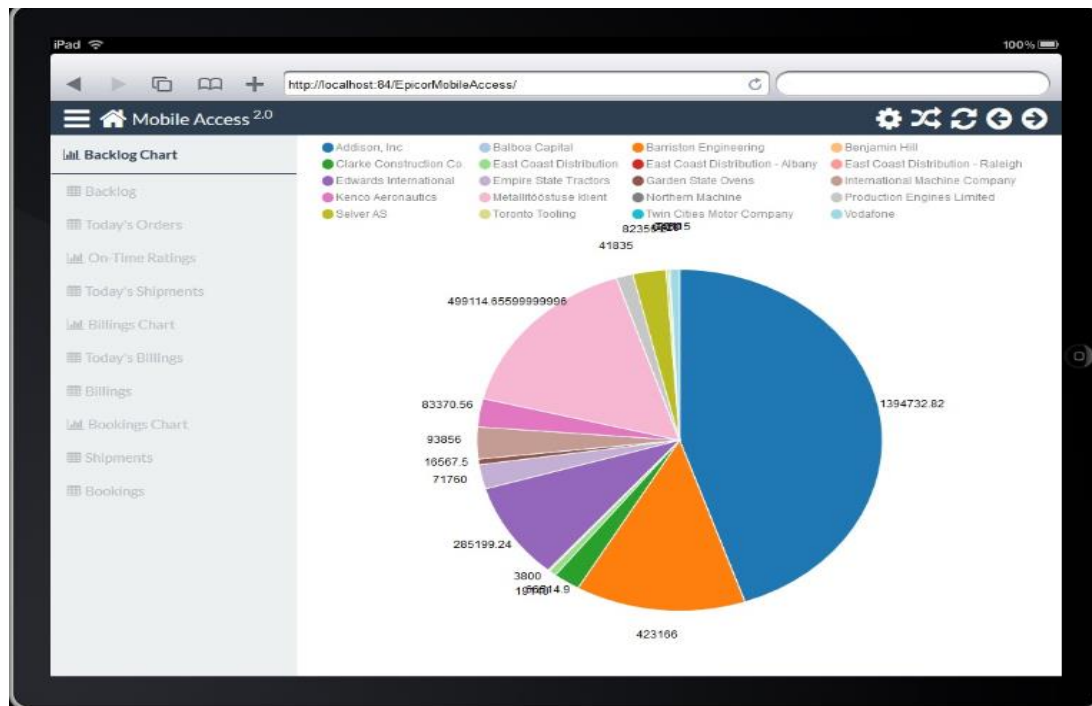- ➢ **VAT (Indirect Tax)**
- ➢ **Fixed Assets**
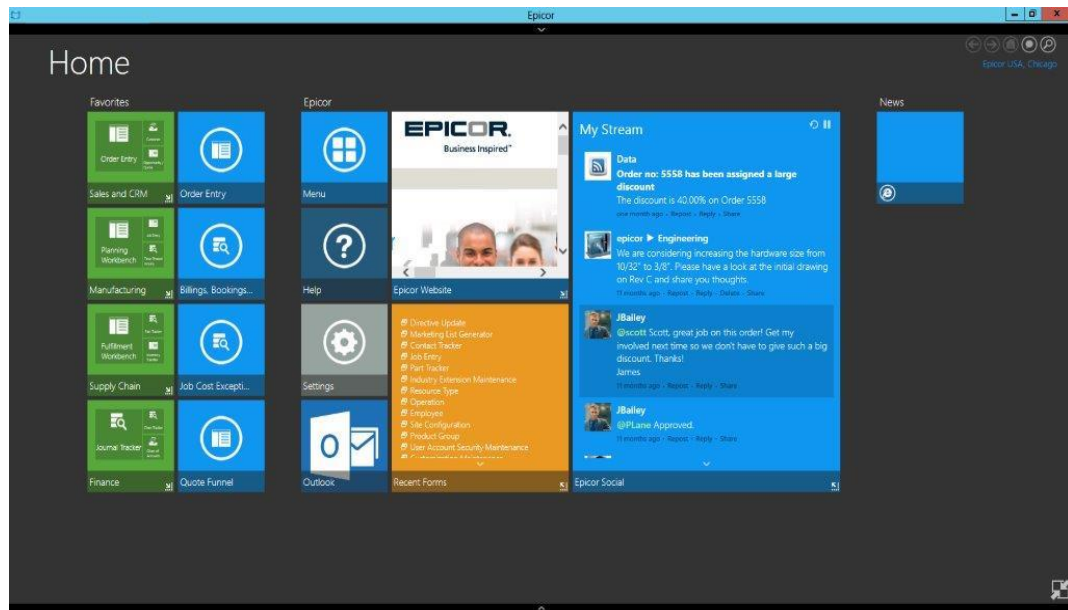
- ➢ **Transactional Reporting and Role-based Dashboards**

- ➢ **Analytical Reporting**

➢ **Governance, Risk and Compliance**
➢ **Mobile Applications**

➢ **Workflow and Integration platform**
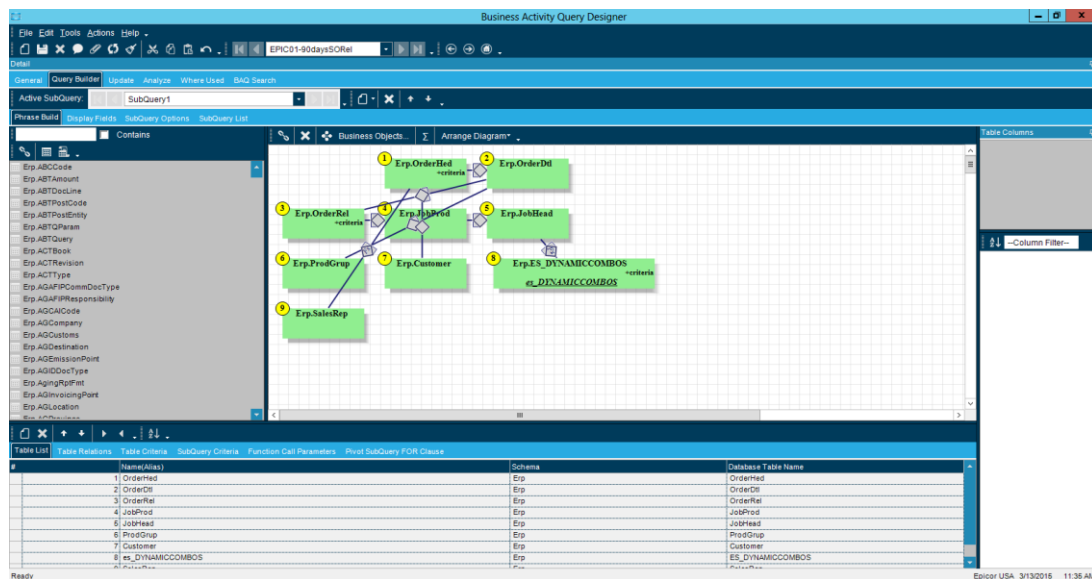
➢ **Purchasing**
➢ **Electronic Requisitions**
➢ **Inventory Management**
➢ **Barcoding/GS1**
➢ **Customer Relationship Management**

➢ **Project Management**
➢ **Time & Expense Management**
➢ **Human Resources Management**
➢ **Supplier Management**
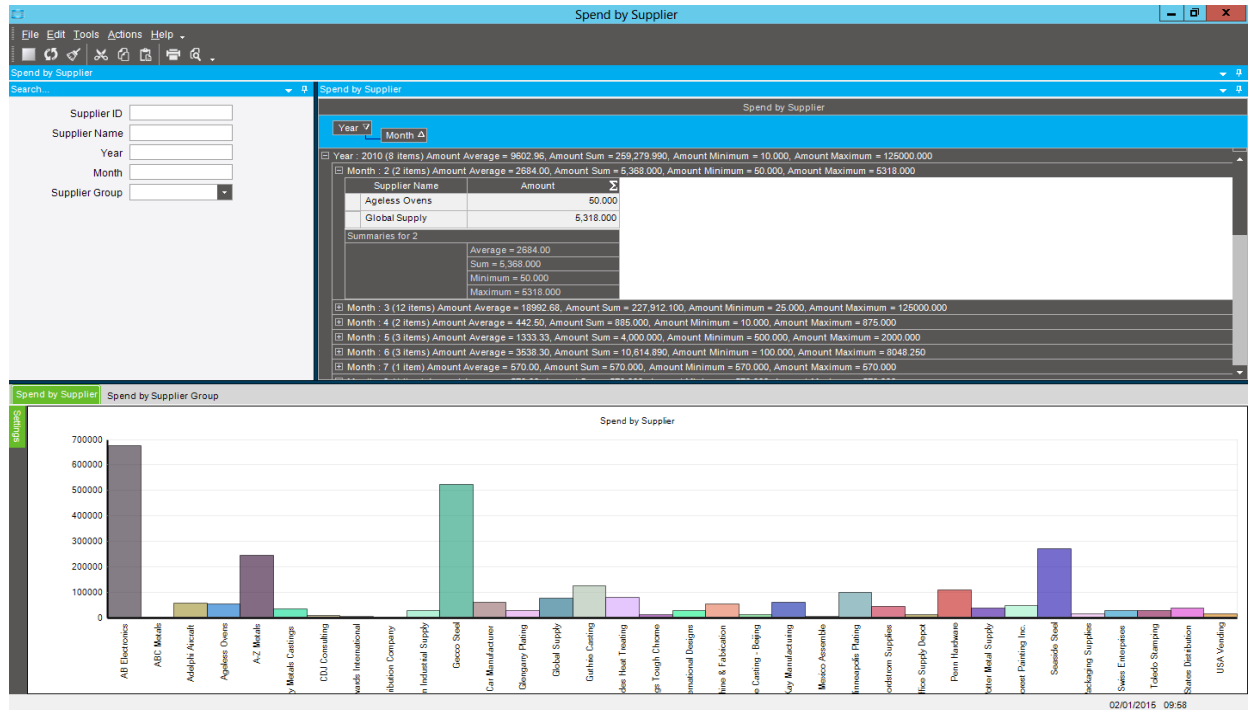
Agile and Enabling Business Architecture

Technology Platform

In order to remain efficient organisations must be prepared to adapt business processes quickly to ever-changing market trends and demands. Quite often the technology that helped automate an operation in the past is the same technology that keeps it trapped today, unable to adapt to the ebb and flow of operational demand. The business technologies of tomorrow need to be intuitive, compliant and adaptive.

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

A Modern Framework

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

Reliable

Downtime is very expensive and many organisations now run 24x7. Although employees may not be on the premises 24x7 many systems are up and running throughout the day to service the needs of operations and their customers and stakeholders who can access the system via the Web or increasingly the Cloud. Epicor ICE allows online backup and complete fail-safe options ensuring availability meets the most rigorous service-level agreements. It also supports corporate social responsibility initiatives in areas such as hardware and software virtualisation for more efficient environmental and energy management - CLOUD

Scalable

Epicor offers scalable and easy to deploy solutions for simple to complex operations. In particular for deployments requiring high end scalability, all business logic within Epicor applications is encapsulated within objects that are executed via application servers.

Agile

The Epicor service-oriented approach to enterprise software development ensures an abstraction of complexities in terms of how business systems are built and operated. In an SOA, business logic that represents software processes is broken down into a series of loosely coupled granular "business services" which are then made available and discoverable on a network via Web services. Epicors' *True SOA* goes a step further by considering both server business logic and client business logic as "business services." This delivers a technology resource that's not just built for change but is designed for people. Epicor ICE reduces the cost and complexity of technology adoption by being completely ready for business.

Accessible

Epicor ICE introduces the Epicor Everywhere Framework for complete user interface and device control including utilising Microsoft .NET Windows smart client technology to provide users the most effective platform in order to maximise their environment. Historically a Windows client meant that applications could only be effectively operated over a local area network (LAN). Smart client technology allows users to connect to the application not only over a LAN but over wide area networks (WAN). The Epicor Everywhere Framework stores client code as XML metadata so that it can be used to generate other user experiences and for any number of devices.
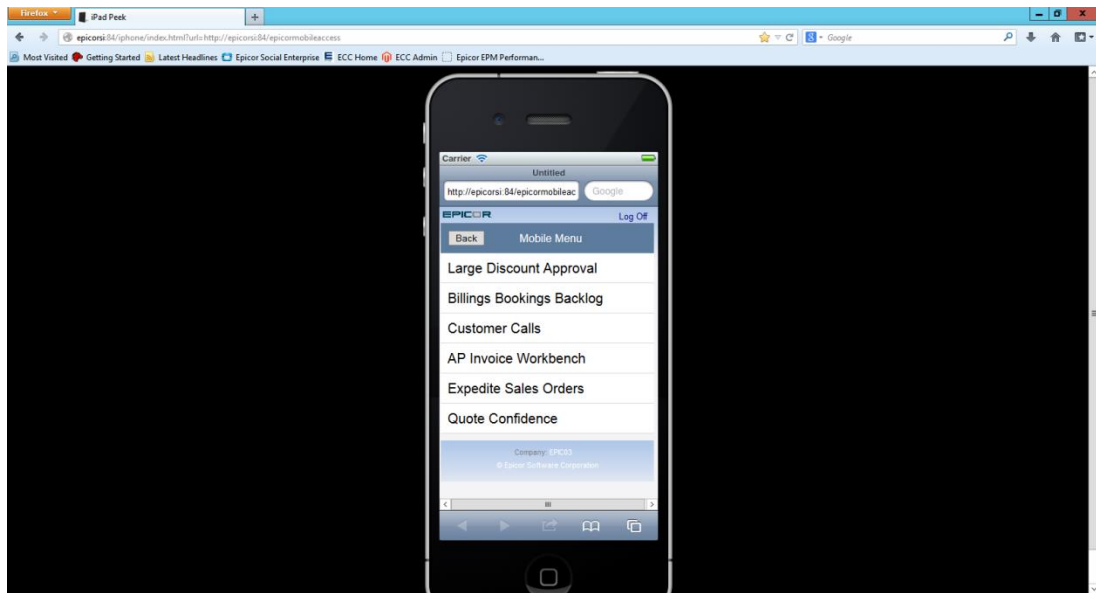
Flexible

Epicor ICE allows companies the flexibility of choosing the technology stack that best supports its objectives. Epicor enterprise applications can be deployed on most major operating systems including Microsoft Windows, UNIX, and Linux, and also allows companies to deploy on multiple database platforms.

Customisable

Epicor ICE has a built-in customisation engine based on Microsoft Visual Studio .NET that allows companies and individual users to customise and personalise their environments without the need to alter existing source code thus avoiding costly upgrade costs. Epicor ICE uses a layered approach to customisation. Customisations are held within the database but in a separate layer, ensuring portability from release to release with minimal effort. Also embedded into Epicor ICE business architecture is a comprehensive business process management (BPM) platform. Epicor BPM allows users to build their own business rules into the application without the need to touch the base source code avoiding costly upgrade issues.

Productive

Epicor enterprise business applications are delivered with a dedicated user experience— application forms that can be rendered either as smart client (C#.NET) or Web client (Ajax). However, Epicor understands that to maximise user productivity, application capabilities need to be extended out to a broader community of users than those who typically spend their time within that dedicated experience. To that end, Epicor ICE also supports composite applications, typically delivered via Web Portals and immersive applications, where application logic is surfaced up within common office productivity tools, like Office. This ensures that all users, no matter what their chosen tool may be, can be as productive as possible. Also embedded into Epicor ICE business architecture are a series of Web 2.0 concepts that raise user productivity to the next level again, such as Enterprise Search for rapid access to relevant information and

support for subscription technologies, like really simple syndication (RSS) that proactively push information to users.

Collaborative

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

Future Proof

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

Why Epicor

An investment in Epicor software is not simply a case of software features. Whilst selecting an enterprise application is not a lifetime commitment, it is a commitment that will last a decade or longer. You have to be sure that you are able to work with the proposed vendor, that the technology is right, the solution fits, the services are appropriate, the cost of ownership is affordable and importantly, the vendor is able to provide long term commitment to you and to the industry. Epicor are uniquely placed to satisfy all these factors:

User Groups & Forums

Epicor's user groups enable users to exchange ideas and information about how they are using their solution. Both International and regional user groups exist to support the Epicor user community with several special interest groups (SIGs). Epicor work with the user group as they plan future product releases and provide support and assistance at user gatherings. Epicor has vibrant local User Groups and would like you to play a full part in this group as customer feedback is a critical part of our development product cycle.

In collaboration with the Epicor User Group, we hold annual gatherings known as "Insights". Insights is a dynamic event that brings together customers, partners, industry and product experts for a focused exchange of plans, tactics, strategies and ideas. Insights isn't only about products, software and technology, it's about providing our customers with the opportunity to learn how new business practices and emerging industry trends are impacting businesses, as well as hearing from leading technology providers about the latest architecture, tools and platforms. Epicor run both global and local Insights so that customers can choose to attend the local event or travel to the US for the worldwide annual session that has over 4,000 attendees.

Company

With the scalability and flexibility to support long-term growth, Epicor is recognised leader dedicated to providing innovative enterprise software solutions to companies around the world. Thousands of companies have put their trust in Epicor to deliver the solutions that answer their business challenges today and empower them for greater success tomorrow.

Technology

Technology is important not in its own right, but for what it enables. Epicor leverages ground-breaking technologies like Web services in developing industry-specific solutions, including enterprise service automation, that enable organisations to immediately drive efficiency throughout business operations and build strong and efficient working processes.

Implementation

Epaccsys embrace amongst others the "Prince2" project management methodology and the implementation of the Epicor solution is very well organised and documented. A full document is available on request, which goes into more detail regarding the Epaccsys implementation methodology.

This section gives you a brief outline of the Implementation process and key information.

There are five main stages within the implementation methodology:

Stages	Tasks
Stage 1	Preparation & Planning
Stage 2	Implementation / Configuration
Stage 3	Data Loads
Stage 4	Business Process Testing and Sign off
Stage 5	Cutover to Go Live

It is essential that the customer appoints an internal Project manager and project team so that it's clear who is working on the project and their role.

The Epaccsys project team will consist of a project manager, consultants and if required developers. The project manager will manage the Epaccsys resource and help the customer's internal project manager manage their team and tasks. The consultants are responsible for implementing the application, training, data migration and testing developments. The developers are responsible for customisations if required.

The customer's project team will consist of a project sponsor, project manager, and super users. The internal project manager will be required to manage resource internally (typically customer staff and tasks) and to co-ordinate with the Epaccsys project manager. Super users need to be appointed to take responsibility for each area of the application. The Super user is the decision maker and ultimately has ownership of decisions on implementation; and will be responsible for learning the product and supporting users through testing and after go live.

It is essential at an early stage of the project, to ensure that all staff within the project team knows who is responsible and where ownership lies for each task and area of the application.

Project documentation - There are a number of documents used by Epaccsys as standard, these documents have been used in many implementations and have a proven track record of contributing to successful projects.
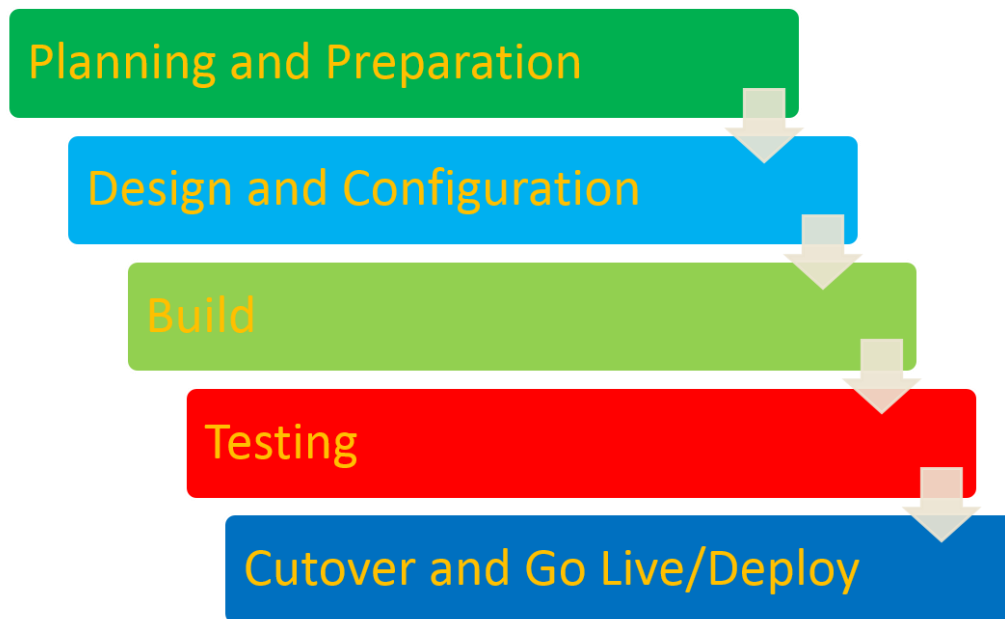
Ownership of the documentation needs to be agreed at the kick off project meeting and a typical breakdown is detailed below.

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It is usual that Epaccsys own the following documents	It is usual that the Customer own the following documents
Meeting Notes	Data audit control document
Meeting Agenda	Data load control document
Contact Sheet	Testing plans
Site Notes	Training documentation
Task List	Issue Log
Risk Register	Training rollout plan
Resource Plan	Procedure Guides
RFC Control Register	Customer cut over plan
Cut Over Plan	Set ups documents

In short the main elements to any successful implementation contain the following points as a minimum.

- o **Promotion best practices**
- o **The Solution and implementation method is tailored based on customer requirements**
- o **There are single points of contact and escalation**
- o **Ownership of activities and tasks is paramount**
- o **Knowledge Transfer is attained as quickly as possible**
- o **Both teams working together to achieve the goals and objectives**
- o **Both teams working to an achievable plan**
- o **Identify, document & resolve issues and risks**
- o **A flexible framework that incorporates the best practices and elements from PMBOK, Prince2 and Epicor Signature methodologies**
- o **Strong communications across all project stakeholders**
- o **Decisions are made in good time to prevent delays**

The main project steps are outlined below each of which requires sign off before moving to the next stage.

Planning and Preparation

Design and Configuration

Build

Testing

Cutover and Go Live/Deploy

Epaccsys support overview

The Epaccsys Support department consists of Frontline support and Backline support which is overseen by Support managers. Epaccsys provides four levels of support to its customers:

Epaccsys support lines are open between the hours of 9.00am and 5.30pm, Monday to Friday (excluding bank and other public holidays). For some clients with international offices Epaccsys can extend the support hours to ensure that appropriate coverage is provided, particularly when relating to high severity issues. This service is provided on a customer by customer basis. The standard monitored internal target is to commence diagnosis of any fault within an hour of receipt of the maintenance request. Fix times vary according to the severity of the issue.

When sending through each support request the customer can assign a priority category of 1 to 4 to the call indicating the degree of urgency of the problem to the Customer's operations. This enables certain calls to be identified for faster response and customer contact. Calls are monitored by the support department manager and can be escalated further if necessary by direct contact with Customer Account Managers and Directors.

Telephone support - Dedicated telephone lines comes straight through to our frontline support representatives. Where possible calls will be dealt with over the phone and conclusions drawn. Calls may need further investigation in which case supplemental info may be requested. This might be screen shots or the support representative may investigate via remote access.

Remote Access Support - Support staff have access to all customers systems and login/remote access details are stored within our ITIL compliant ITSM system. Remote access can be done with or without the customer depending on the nature of the investigation e.g. LogMeIn for 'seeing' an issue, RDP for looking into a technical issue, which the customer may not necessarily wish to be involved in. As part of Epaccsys's processes a test system is made available to support by the project team. The test system is also set up for the customer so that changes can be investigated on a test system by the customer. Users are trained in how to maintain this and Epaccsys recommend that data should be refreshed at monthly intervals from the live system.

On Site assistance - On site assistance can be booked via your PM for help in more complex items such as setting up a new company, implementing a new module, developing custom reports and Explorer views

Upgrades / Updates - If an upgrade is identified as being beneficial then we will ensure you are made aware of it. Epaccsys recommend that the customer upgrades at least once a year to take advantage of new features, keep up to date with technology changes and benefit from fixes within the software. Epaccsys will advise the appropriate resourcing required to take on each upgrade. It is possible to take an enhanced support contract which includes upgrade time if deemed appropriate.

We encourage our customers to have key members of staff who act as their own front line support, this way we find the handling of support queries is more effective.

Support Issues are prioritized and graded according to the level of seriousness:

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Grade 1 – Business Critical, business cannot operate or application has failed

Grade 2 – Non Business Threatening – Causing users major inconvenience but business continues to function

Grade 3 – Functional Requirement – Causes difficulty but there is a work-around

Grade 4 – Cosmetic change or fault requiring rectification

Calls are allocated a unique number and this is emailed out to the customer within an hour of receipt of the call or provided on the phone if a call is telephoned in.

Call events – all communications (emails, phone calls) between any parties involved in a call are logged and recorded as a call event. This allows anyone at Epaccsys to pick up the call as there is a full audit trail of events.

Call statuses are set depending on next steps to resolve the call e.g. if a call has a question/request for more info put to the customer, call status = Await response customer. Upon receipt of the info the call reverts back to 'with Support', it's reviewed, updated and actioned accordingly.

In some instances support calls are passed back to Epicor. In this situation details of any response from Epicor will be passed back to the customer. Open calls are chased up weekly and customer updated accordingly.

Customers can escalate a call at any time via their Support or Account manager. All support calls and issues are continually monitored and reported on internally to ensure we give the very best service to our customers.

Our support operative's performance and skills, knowledge are continually developed to ensure we provide the very best service to our customers. Customer's feedback is encouraged so we can continuously improve our levels of service and 6 monthly surveys are conducted with our customers. Currently Epaccsys customers consistently provide scores of 9 or 10 related to satisfaction of service.

Summary

In conclusion Epaccsys Ltd would like the opportunity to work with you as you evaluate your system requirements for the coming years. Epicor 10 ERP is a new breed of enterprise business applications built not just with scalability, accessibility and flexibility in mind, but with an eye to the sophisticated functional needs of forward thinking organisation like yours that expect to continuously improve and perform to its best.

The combination of the function of the Epicor software and the implementation experience of Epaccsys will give you the security of investment that comes with dealing with skilled implementers, a large international software developer, and software that will support all aspects of your business now and in the future.

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