# What’s New in Epicor ECM (DocStar) 2022.2?

Welcome to version 22.2 of Epicor ECM (DocStar). In this new release, we’ve added some useful new features, including the Automation Studio workflow task; new browser-based reporting (powered by Exago); 100% cloud implementation via MS Office 365; and Certification with latest MS technologies.

We’ll also take a look at the latest Betterizers – enhancements requested by you, our customers.

Automation Studio Workflow Task

The new Automation Studio workflow task will increase communication and integration capabilities.

This feature is important, as it enables communication through SMS, Slack, MS Teams, and many other platforms. It is also the first step in integration with other systems via iPaaS (Integration Platform as a Service).

In an Epicor ECM (DocStar) workflow, you can utilize the Automation Studio task. The task will accept any number of inputs, and the inputs to the task will transfer to Automation Studio through a webhook.

You link the task to an Automation Studio recipe -- a recipe that triggers from a webhook -- and plug the recipe address into the ECM (DocStar) workflow task.

So, when the task is executed in the workflow, the system sends the data to Automation Studio, which then performs the recipe.

For example, your workflow task might send a phone number to Automation Studio, which then sends an SMS to that number, which includes a link to the ECM DocStar document in question.

Epicor ECM (DocStar) Reports

The new, embedded browser based-reporting solution, powered by Exago, moves from an on premises reporting solution to a cloud-based solution.

This is great news for cloud customers, as they will no longer require a dedicated on premises reporting server.

Reports are integrated with ECM DocStar’s security classes system, ensuring personnel only get access to the reports they’re authorized to view. Under each security class, there’s a Report Folder check box. Select this, and a dedicated folder is created for reports with this security class; only users with access to the security class can access the folder.

Also, in order to maintain the performance of hosted systems, data is replicated to a dedicated reporting database, which ensures live databases are not impacted by the burden of user-generated reporting.

The Reports tab is where you’ll find the new Reports module. The ReportWorks module also remains accessible in the Legacy Reports tab.

There is a set of standard reports, which you can import. All you have to do is select “Import Standard Reports”, and this set of standard reports will be placed in the ECM Standard Reports folder.

By purchasing the Report Designer, you gain the ability to modify the standard reports or create custom reports. The Report Designer is provided at no charge to those organizations who have a valid license for or currently subscribe to the ReportWorks module.

As was the case with ReportWorks, you can limit access to Reports and the Report Designer to certain users through the application of two admin permissions: Report Viewer and Report Administrator.

Report design involves a simple, intuitive drag-and-drop system.

Full Cloud Implementation via Microsoft Windows 365

It is now possible to install the Epicor ECM (DocStar) client on Windows 365, a cloud-based service that provides a new type of Windows virtual machine (Cloud PCs).

This enables a 100% Cloud implementation, as there is then no need to have a local on-site installation to handle certain tasks, such as the Distributed Queue Processor, email batch import, (Barcode, OCR, Imaging, MS Office).

A subscription to Microsoft Windows 365 Business effectively offers a Windows PC in the Cloud which you can use to host the Epicor ECM (DocStar) client.

Compatibility with Latest Microsoft Technologies

Epicor ECM (Docstar), and the ECM (DocStar) Client, are now fully compatible with Microsoft Windows 11 (64-bit), Microsoft Office 365, and Windows Server 2022.

Betterizers

In this section, we’ll look at the Betterizers, which are solutions requested by you, our customers.

The Epicor ECM (DocStar) application now allows you to send a combination of eSigned and non-eSigned documents in an email. When you send an email, and you select Signature, each document that has been eSigned is sent as a signed PDF; other documents are sent as a PDF. In previous versions, unsigned documents were not included. This applies to the Send Email and Save a Copy options on the Actions menu, and also the Send Email workflow task.

You can now configure footer information and content for outbound emails at the organization level. This enables companies to share brand messages, as well as contact or general information about the organization, including social media details. To set up the footer, you require admin access. Navigate to Admin > Email Footer Settings. In the Add/Edit Email Footer editor, enter the footer content. Select Enable Email Footer. To view the footer, select Preview.

If you enable the Auto Grow option, forms with their layout mode set to Flow support expandable text boxes. The text box expands according to how much text is in the form text box. When you submit the form, the entire text is visible without overlaps. This setting is disabled by default. To enable it, navigate to System Settings, and select PreviewFormsFeatures.

If you add the Clear Stamp task to a workflow, this step removes any image or text stamps added by the workflow or the user. This does not affect approval stamps or redactions. If you apply the task to a document with annotations, the item keeps all annotations except text annotations, because text stamps and text annotations share the same mark type.

In the document viewer, you can now sort lists in the History accordion. You can sort the Comments list from newest to oldest, or oldest to newest. Select the Settings icon in the History accordion. Select a sorting option from the drop-down. Then Save your selection.

You can now new search based on the date when an item was approved (or denied). On the Retrieve page, in the Search Fields accordion, select the Approved On or the Denied On field from the drop-down.

Select an appropriate operator, then select a date. Your search retrieves only items that match the approval (or denial) date criteria you set.

Epicor ECM (DocStar) can retain the size of the datalink search box whenever you perform Datalink Search while processing a workflow.

For more details on this release, access Guided Learning in the Application, or visit EpicWeb.

The contents of this document are for informational purposes only and are subject to change without notice. Epicor Software Corporation makes no guarantee, representations or warranties with regard to the enclosed information and specifically disclaims, to the full extent of the law, any applicable implied warranties, such as fitness for a particular purpose, merchantability, satisfactory quality or reasonable skill and care. This document and its contents, including the viewpoints, dates and functional content expressed herein are believed to be accurate as of its date of publication. The usage of any Epicor software shall be pursuant to the applicable end user license agreement and the performance of any consulting services by Epicor personnel shall be pursuant to applicable standard services terms and conditions. Usage of the solution(s) described in this document with other Epicor software or third party products may require the purchase of licenses for such other products. Epicor, the Epicor logo, and are trademarks of Epicor Software Corporation, registered in the United States and other countries. All other marks are owned by their respective owners. Copyright © 2021 Epicor Software Corporation. All rights reserved.