# What’s New in Epicor ECM (DocStar) 23.1

Welcome to version 23.1 of Epicor ECM (DocStar).

In this new release, we’ve added a number of useful new features, including integration with Epicor Collaborate; a number of additions to the P21 AP Automation Integration, and embedding of Automation Studio.

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

We’ve also introduced some new features to the ECM (DocStar) mobile application.

Then we’ll wrap up with a wide range of general improvements and enhancements we’ve made in the Web UI (user interface). There’s quite a few of those, so they’re under two headers – Web UI and More Web UI.

To go through this course, you can click the buttons at the top for general topic areas and select each sub-topic to view the video.

**Subject Areas:**

* **Baseline Features**
* **Epicor Ideas**
* **Epicor ECM (DocStar) Mobile App**
* **Web UI Improvements**

BASELINE FEATURES

Automation Studio Embedded

Automation Studio, powered by Workato®, connects Epicor ECM (DocStar) with external cloud-based tools that help you automate business workflows across cloud and on-premise apps.In Epicor ECM (DocStar), Automation Studio is available as iPaaS – Integration Platform as a Service.

The importance of Automation Studio integration with ECM (DocStar) is that it exposes Automation Studio API Endpoints as DataLinks in ECM (DocStar), which you can apply in workflows, and in the user interface – for example in Type-Ahead or Drop-down fields.

So, it is a gateway to integrate with hundreds of applications, including, for example, SalesForce, and Dynamics 365 Business Central.

As you can access your Automation Studio integration from within ECM (DocStar), you can create recipes, add users and permissions, and so on, directly in ECM (DocStar).

Once ECM Automation Studio is licensed, and the instance is registered, you’ll be able to access the Automation Studio and Automation Studio Setup screens within ECM (DocStar).

On the Setup page, you can see the Integrations, and register Instances, and you can add users and their Permissions.

On the Automation Studio page, thanks to an iFrame, you see what you would see in Automation Studio itself. You can view and create Recipes, view Dashboards, and so on. But now, there’s no longer a need to go into a separate application; you can do it all in one place.

Collaborate

Epicor Collaborate is a digital messaging platform already in use in Epicor ERP systems, such as Kinetic.

We now offer the ability to use Collaborate as part of the integration of Epicor ECM (DocStar) and Epicor Kinetic, enabling customers who use both these applications to share documents and packages between ECM (DocStar) and Kinetic, streamlining communication and efficiency.

In ECM (DocStar) 2023.1, you can make use of Epicor Collaborate to share documents to Kinetic in two significant ways:

Send a document or package On Demand, or automate it as part of a workflow task.

You access the on-demand option from the Actions menu – for example, in the Document Viewer, Retrieve grid, Workflow, or Packages. Select Share > Collaborate to bring up the Share Via Collaborate window, where you can select the Integration (if your organization has more than one), and decide whether to send the document to the whole company’s Collaborate Stream, or to a particular Group, which you select from the drop-down.

Enter any Message text you want to include. You can also tag users within the message text.

A Direct Link is always sent. This is a link that enables other ECM (DocStar) users to open the document within ECM (DocStar).

You also have the option to Include a guest link, which enables non-ECM (DocStar) users to access a copy of the document.

Now, in Epicor Kinetic, the relevant users receive the message to their Collaborate stream, where they can click on the link to view the document.

You can also automate the sending of documents via Collaborate using the Collaborate workflow task.

Like we saw with the On Demand usage, in the workflow task you can specify the Integration, select to send to the company Collaborate Stream or a selected Group, and enter the Message to send with the document. As with many other workflows, you can use the curly brace syntax to populate the message with content from the workflow inputs, such as users’ names, invoice numbers, dollar amounts, and so on.

And you can decide whether to include a guest link for non-ECM (DocStar) users.

So, when the workflow task is enacted, the relevant users will receive the message and document within Epicor Kinetic, in their Collaborate feed.

Prophet 21 Duplicate Invoice Handling

A significant enhancement to the P21 AP Automation Integration involves the handling of invoices that are already found in P21 or in Epicor ECM (DocStar).

Now, when the system detects an invoice that already exists in ECM (DocStar), a message displays - Duplicate invoice found in DocStar.

In the Workflow accordion, you’ll now see the Next Step field, which gives you three options:

- Retry with updated data – select this option if the invoice data was entered incorrectly – in the Invoice Number and Vendor Name, enter the correct values, then select XXX. The system performs the same validation again, and this time, if there is no longer a duplicate, the invoice workflow can complete successfully.

- Label as duplicate and file – If you select this option, click Submit to complete the workflow, and the document is created, but (DUPLICATE) is appended to the beginning of the document Title.

- Delete invoice from DocStar ¬– If you select this option, and click Submit, the item is deleted, and is sent to the Recycle Bin. The system prompts you to confirm that you really want to delete it.

You can use Duplicate as a search term, so you can easily find all items marked in this way.

On the other hand, if the system detects an invoice that already exists in P21 (but not in ECM (DocStar), a different message displays: Invoice already exists in P21, and the behaviour is slightly different:

In the workflow, you’ll see the message: This invoice is already present in P21. Please select Submit to proceed and wait for payment details.

When you click Submit, the workflow completes, the document is created in ECM (DocStar), and awaits payment.

One more scenario: If the invoice is already present in P21 and payment has already been received for it, the Invoice already exists in P21 message displays, plus the Voucher No. for the payment.

This whole enhancement applies to PO Invoices, Non-PO Invoices, and Debit Memos.

Data Monitors

Many business cases employ workflows that look for external data which may not yet exist. Such workflows poll for the data using the Wait For task or the Sleep task.

In certain cases, the number of items (documents or packages) in the wait/polling state can be very large, and the Datalink(s) that read the required data may be unable to meet the demand. Execution of these DataLinks at each polling interval can impact the performance of both Epicor ECM(DocStar) and the target system.

This is where Data Monitors come in. A data monitor serves to alleviate the polling of the same data source by a large number of workflow documents. They achieve this by performing the polling on behalf of the workflow documents, and notifying those for which new data are available. So, the workflow documents themselves wait quietly (not polling) until they receive notification from the Data Monitor they subscribe to, at which point they can then execute their respective queries.

Data Monitors are effective when many workflow documents are polling for similar data, for example, checks issued for an AP invoice. Even though each workflow document may require a different parameter, such as vendor ID and invoice number, together they can take advantage of a single Data Monitor that looks for all new data – for example, newly-issued checks. The Data Monitor executes its own DataLink which identifies new data that has been added or changed since its last poll.

Data monitors are compatible with all types of DataLinks, including SQL, Web Service, and those available through integrations.

Subscribers (i.e. workflow documents that subscribe to the data monitor) use a new workflow task, called Wait for Data, to enter a wait state with no polling. They then remain in that state until notified by the Data Monitor.

EPICOR IDEAS

In this section, we’ll look at the Ideas we’ve made reality - these are solutions requested by you, our customers.

Suppress Form Condition Evaluations

In 2023.1, you now have the ability to suppress form condition evaluations from audits.

Up until now, form conditions have been audited, and also form condition exceptions. This means that, when they are evaluated, they create audit entries.

Now, you have the ability to switch off evaluation of these form conditions, so audit records will not be created. This helps manage the number of audit records being created.

To change the settings, on the Admin page, go to Audit Settings. At the bottom of the list, select Edit.

In the Form section, as you can see, you can enable or disable auditing for Condition Evaluation, Condition Evaluation Error, Created, Deleted, Downloaded, and Modified.

Select the actions you do not want audited. Make your changes and select Save.

In the list, in the Forms section you can see the actions that will not be audited.

Read-Only Custom Fields

You can now make custom fields read only. There may be cases where having a custom field read only is certainly desirable. For example, you may have a custom field which is a check box whose status is changed by a workflow, say, when an invoice is paid. If users can inadvertently change the status themselves, it may cause disruption to the workflow. Therefore, by setting a field to read-only, the workflow can still change its status, while users can see its status for information purposes, but cannot interfere with the status.

Under Admin, go to Fields. Select the field in question. Select the Read Only check box. Save your changes. That’s it.

Extended pattern match to include US phone numbers and Regex pattern formatting for International Numbers

In Forms, when you set the Conditions for a field, the Pattern Match setting now includes Regex patterns to accept US phone numbers with 1 at the beginning, and international phone numbers with a + at the beginning.

In the Pattern Match settings, if you select the US Phone Number template, the Regex Pattern now allows a prefix of 1, followed by a space, dash, or no space. For example, 1-8009991809 or 18009991809 or 1 8009991809..

If you select the International Phone Number template, the Regex Pattern will accept an optional + at the beginning of the number. For example, +441344468468.

MOBILE APP

This section looks at enhancements specific to the Epicor ECM (DocStar) mobile application.

Responding to Workflow Requests

The Epicor ECM (DocStar) app allows you to view, approve, or deny workflow approval requests. When you submit a mobile approval request, the approver receives an email with two approval links. If you already have the Epicor ECM app installed on your mobile device, the first link – Click here to Approve/Deny – opens the mobile app, where you can approve or deny the request (after logging in); otherwise, this link will direct you to approve using the MARS (Mobile Approval Request System) website.

The second link – Click here to view in Epicor ECM (DocStar) – opens the ECM (DocStar) Web UI in the device’s browser. This feature is available in Android and iOS for hosted customers.

Retrieval Grid Search Enhancements

In the ECM (DocStar) mobile app, the retrieval grid layout has the following improvements:

- For the first-time login, by default, the retrieval grid displays the Search page layout as its landing page. This allows you to perform a search without having to click the "edit search" button in the blank retrieval grid.

- The app retains the last search criteria performed and displays the same search results on subsequent logins until the filter refreshes.

WEB UI Improvements

DataLink Caching

Many DataLinks, of various types (such as eConnect, WebService, etc.) retrieve lists (or other semi-static data). For example, a lookup for currency, or for a department code.

If you know that the data for a given DataLink don’t change very often, caching is practical, and beneficial for performance.

This new DataLink Caching option enables you to apply caching to any DataLink of any type, including integrations.

When caching is enabled, a query (not an update) with a specific set of parameters will return a result set cached from a prior call with the same parameters.

To enable caching, go to Admin > DataLink, and select the datalink in question.

The new field is Cache Duration (in seconds). The default value is 0, meaning caching is not enabled.

Set a value in seconds. Select Save. Now, when the query runs, the result is cached on the server for the period of time you set in this field. So, during that time, a new query will not go to the database (or integration target).

The most common usage examples for this feature will be lookups for targets where the data don’t change very often.

Line Items Pop-Out

You can now pop-out the Line Items accordion into a new browser window. This enables you to easily review line-item content, leading to an improved user experience.

To make use of this functionality, simply click on the pop-out icon on the Line Items accordion.

The Line Items open in a separate window, which you can then re-size and move to the best location on the screen – or to another screen.

Next to the Line Items title, you’ll see a link with the Title of the document – click this to go back to the original document.

You can save changes to line items in the new window, and when you hit Save, the changes are reflected on the main screen as well. Also, when you then open another document, the line items window automatically refreshes with data for the new document.

If you make changes in the separate window, then attempt to open another document on the main screen, the system will prompt you to save or discard your changes, before updating the window to show data from the new document.

Enhanced Auto Match

We’ve also enhanced some auto-match features:

First of all, we’ve added a Regular Expression comparison type to the Auto Match workflow task.

The Auto Match task automates receipt selection by finding a receipt or combination of receipts that match an invoice total.

Up till now, for the PO-based workflow, the Auto Match task was comparing the Item ID for exact matches. The Item ID compare option used the Direct type, requiring a direct match between the Item ID value in the source (receipts) and the values in the target (invoice metadata).

But sometimes, the Item ID may be presented slightly differently in the source, compared with the target.

For example, our invoice document in ECM (DocStar) has the Item ID A 100, but in the receipt in the ERP system (such as Kinetic, or P21) the item ID is A-100.

Up until now, such items would fail to match.

That’s why, instead of the Direct compare option, you can now select the Regular Expression compare option in the workflow task.

Here, you enter the expressions for the source data and the corresponding expression for the target data. For example, these expressions might remove the non-alphanumeric characters – the space or dash from the item ID – thus enabling the task to match these corresponding items.

Verify Field Group Task – Compare Options

We’ve enhanced the Verify Field Group workflow task to allow the same compare options as you’ll find in the Auto Match task.

This enables you – to give a good example -

1. To use comparison options on a Keyed column, for example ItemID. You can use the new Regular Expression comparison mode field – to compare Vendors or Item IDs that have or don’t have punctuation or similar symbols.

2. It can also be a way to verify that the Extended Amount matches (with or without some tolerance) when the datalink data doesn’t have an extended amount column, by using an advanced formula for comparison – to combine data from multiple columns to use in the comparison.

Instead of comparing Qty to Qty and Unit Price to Unit Price, if the datalink data is in a different Unit of Measure to the Target, you can compare, say, Unit price \* Qty.

Thus, a receipt for 1 dozen eggs @ $12 per dozen can match an invoice for 12 eggs @ $1 per egg.

History Accordion – Download Logs

In the Epicor ECM (DocStar) Web UI, you can now download the history logs from the History accordion. Simply click on the new Download icon, which you’ll find next to the settings (gear) icon.

The Export status message displays. Once the export is complete, click the download link to download an Excel (.xlsx) file to your workstation.

In the Excel file, you’ll find five tabs. Four of them – Comments, System, All, and Approvals, correspond to the tabs you can view in the History accordion, and contain the same data.

The extra tab – Information – provides basic data about the download – the Document Name, download time, and who downloaded it.

One thing to note: In the History accordion, if you click the Settings (gear) icon, you can change the sort order of the data in the History accordion. For example, Oldest to Newest or Newest to Oldest. If you then download the logs, the Excel file will reflect the sort order that you set.

Workflow Performance Tracker

In Epicor ECM (DocStar), you can now measure workflow execution times, view DataLink performance, and track counts per DataLink. The Workflow Action Engine\* computes the completion of each workflow action, with data such as workflow, step, and action names, and total execution time, starting from the action execution through to commit (to the server).

The performance tracker captures DataLink execution time, and collects data and a count for each workflow action or query on the server. The total execution time includes the server's commit (save) time. The user input action performance is evaluated once the inputs are transmitted to the server – without accounting for idle time. So it’s not the purpose of this tracker to record how long a workflow sat waiting for a user’s input.

On-premise users can view these performance metrics in their SQL Server Management Studio, in the PerformanceMetrics table.

Hosted users can instead access the data through reports.

Note: Performance tracking of an action leading to an exception is not quantified.

(ECM systems check in every week for licensing “update”. When they do this, they send a load of data/info. This workflow performance data is now included. When the weekly check-in occurs, the PerformanceMetrics table is cleared, and its data moves to the PerformanceMetricsArchive table, with a date.)

This functionality is enabled by default. You can enable or disable it via the Site Setting: Performance Statistics, Enabled. Also, if you need to stop the data archival at the weekly system check-in, you can disable the Performance Statistics, Auto Reset setting. This is also enabled by default.

Hide Yes/No Option in User Verify Field Group Task

In the User Verify Field Group workflow task, we’ve added the ability to Hide Yes/No options in the user interface. If a failure notification requires a Yes/No response, all well and good, but there are some use cases where Yes/No is not an appropriate prompt when a failure occurs, so now you can disable it.

(MORE WEB UI)

Verify User in Group – Workflow Task

Verify User in Group is a new workflow task we’ve introduced in this release.

This task enables you to verify whether or not an assignee is a member of a particular group.

The new task accepts one input and zero-or-more outputs.

In the Select Group field, you can select any group that currently exists in the company.

When an item goes through this workflow task, if the assignee is not in the group in question, the system throws an exception. If the assignee is a member of the group, the workflow can continue and complete successfully.

Purge Workflow History

The History accordion records details of when workflows move from step to step, and the messages users send to each other in this process. Complex workflows, with many steps, and the potential to be reset, can end up with a lot of records in the history, all of which takes up data storage space.

So now you have the option to purge old workflow history records.

Under System Settings, you’ll find the new setting: Workflow, Purge History (Days).

Enter the value in days and hit Save. For example, 60 days, after which workflow records will be purged.

When you view the Audit Trail, these purge actions are recorded with the Description History Removed.

DataLink Field Group Workflow Task – Access to Row Number

In previous versions, it was necessary to create extra custom tables and datalinks and integrate them into an AP workflow in order to have the Item (AKA Row Number) accessible to output a collection of line items.

Now, you have the ability to access the row number to map, which removes the need to use extra DataLinks and custom tables.

In the DataLink Field Group workflow task, for tasks that specify the Field Group, you can use just the $RowNo argument. This provides sequential Row Numbers from 1 as each row is processed.

Or, in tasks that do not specify the field group, use the complete field group syntax: $FieldGroup.[Field Group].$RowNo.

CSS Editor and Themes

You can now create and apply custom themes to forms in Epicor ECM (DocStar).

In the Form Options, the CSS Layout field is now a drop-down. In a new form, this is a standard Default theme. Select the edit icon to open the CSS Editor, where you can edit and use a generic theme to create your custom form template. This editor is now a pop-out, separate window, making the layout easier to read and work on.

Within the CSS Editor, you can make your edits, and select Format to validate and format the code automatically.

The editor also has validation and type-ahead.

Select Save As to save the template form with a new title. Select Apply to apply the theme to the custom form and all forms that use it.

After you make changes to the theme, remember to save the form itself as well.

Workflow Designer Updates

Epicor ECM (DocStar) workflow designer features a new and more intuitive user interface that helps you to be more productive while working with an updated and fresh design. The changes to workflow designer include:

Styling tweaks on workflow designer.

Thin border on steps, connectors & arrows.

Action menu with appropriate icon.

Branch label font and color changes.

Dropdown menu and toolbar to manage steps.

Zooming support.

Context menu style changes.

Branches (LineType) defaults to Flowchart.

On/Off background image (grid) from context menu.

Home Screen Updated Logo

The Epicor ECM (DocStar) application Home screen now has an updated background Image.

Sample Forms Logo

In Forms, when a user opens a Sample form, or creates a new form based on a Sample form, both the Form Preview and the Designer Preview display the current Epicor logo.

Expanded Fields List

The list of form fields now expands to fit longer field names. This enables admins to more easily find and select long names, especially when multiple fields begin with the same long term.

Previously, enlarging this field box was constrained. Now you can select any lengthy field name from the list; the fields box on the Fields page expands to display the complete field titles.

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