epicor

Collaborate

Discover how you can create an empowered community with Kinetic at the center

Connect Your Organization Like Never Before

Meaningful relationships exist across your company and are a great resource for serving customers and improving efficiency. When workers engage with each other to solve problems and innovate processes, your business benefits and strengthens. By integrating unstructured meetings and conversations with your critical business ERP data and by enabling worker conversations digitally, you can help eliminate worker silos—giving your business a competitive advantage.

Collaborate is an enterprise-wide collaboration and productivity tool built on a cloud platform that connects to on-premises or cloud deployments of Kinetic. Easy to use and intuitive with hashtags and mentions, Collaborate connects groups of workers simply. When your employee teams communicate digitally, you increase customer responsiveness and satisfaction.

Actionable for Greater Productivity

Easily accessible across the Kinetic application, Collaborate shifts workers from monitoring analytical dashboards and reports to being actively engaged with instant notifications from ERP processes and events. Collaborate message streams collect and communicate these messages across the enterprise. Outlier events that often bury users in meetings or email are easily managed with the flexibility and simplicity of Collaborate—optimizing productivity. Key integrations driving worker productivity include Microsoft Teams®, Epicor IoT, Epicor Virtual Agent (EVA), and Data Discovery:

- Use the Microsoft Teams integration to connect workers with external players and communicate project details with shared Collaborate messages.
- Receive notifications directly from your equipment through the Epicor IoT integration to Collaborate or notifications of events happening in Kinetic and drive new levels of responsiveness and productivity.
- Chat in Collaborate with Epicor Virtual Agent (EVA) using your own words to ask questions and execute commands.
- Share, discuss, and drill down into Data Discovery metrics in Collaborate messages. Turn your company into a data-driven organization that can more easily solve problems, identify new business opportunities, better serve customers, grow sales, improve operations, and more.

Kinetic

Benefits

Modernize employee communication for more engaged workers
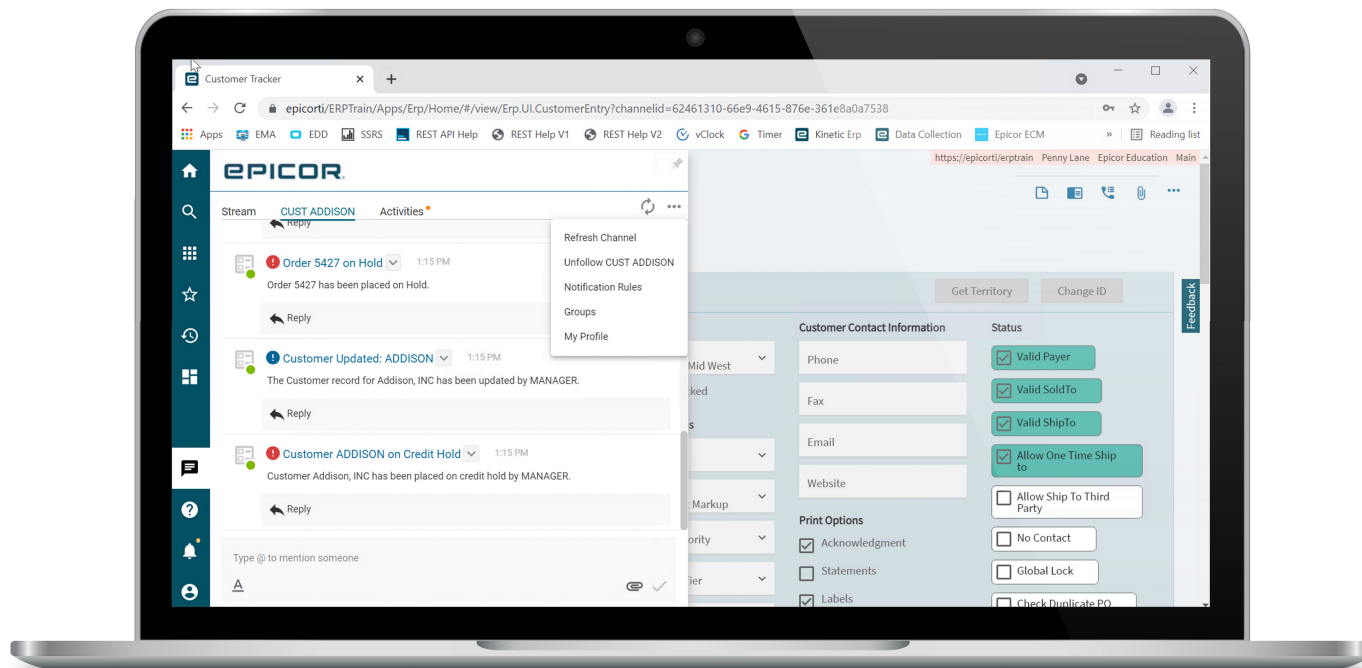
Boost team productivity and responsiveness

Launch a chat linked to a Kinetic record you are viewing

Assign a drilldown hashtag to a Kinetic entity such as a customer or order

Eliminate worker silos to improve customer responsiveness

Reduce time wasted with email and status update meetings

Easily integrate cloud-deployed Collaborate with Kinetic in the cloud or on premises

Simple to Learn—Designed for Business

Collaborate contains many of the same messaging conventions your employees use at home on their devices. This makes Collaborate simple to use and quick to learn. As a result, Collaborate can offer a fast return on investment.

Collaborate helps all users stay in touch. Employees log into the Kinetic Home Page and select the Collaborate tab. They can then start messaging, subscribing to notifications from Kinetic, and sharing knowledge. Collaborate functions are like other leading cloud-native digital messaging tools, but the feature is designed for heightened connectivity for Kinetic and your business.

The Promise of Cloud

Built on the Microsoft® Azure® platform, Collaborate is a cloud solution that leverages powerful Azure tools to deliver security and scalability for your messaging needs. More importantly, the cloud platform provides access to Collaborate on a desktop or a compatible tablet through the Kinetic Home Page in both browser and desktop client. Collaborate makes work happen anywhere—providing timely messages for rapid decision making.

Shared Knowledge

Sharing knowledge helps businesses more easily onboard new employees and retain critical knowledge to support future operational efficiency. Making it easier for staff and departments to share information means that skills and knowledge can be pooled—leading to timely problem solving, better project progression, and new ideas. Collaborate provides a robust repository of contextual, hashtagged, and searchable messages to help workers find answers to recurring customer issues, store and retrieve process knowledge, and maintain historical audits.

50+ Notification Rules with Security

Subscribing to notifications when certain changes occur in Kinetic data helps business leaders respond to problems as they happen. For example, a stakeholder may subscribe to a customer or credit hold status. Once a credit hold message appears in their Collaborate message thread, stakeholders can message finance immediately to determine the reason and follow up with the customer.

Out-of-the-box self-serve notification rules for users to choose relieve the burden on IT managers to create BPMs. Collaborate offers a wide selection of popular notifications, such as part created or invoice posted, across these categories: Customers, Orders, Quotes, Shipments, Jobs, Field Service, Cases, Projects, Suppliers, and Others. Each notification rule has its own security code which admins can set up to allow or disallow access for certain users and groups; for example, only the accounting team can choose the notification rule for when an order goes on hold.

Moderator Security Group

Admins can assign moderators via a new security group "Collaborate Moderator" to make sure conversations are compliant with company community standards. Any user can privately report inappropriate posts to the Moderator Group. In their special Moderator stream, Moderators can review and action the reported posts and view entity hashtags. Moderators can also change the ownership and membership of existing Collaborate groups.

Creator Security Group

This security group can create new groups and add special hashtags tied to a Kinetic entity such as an order or a customer (not to be confused with the normal #hashtag that any user can create). This group can help admins keep the number of groups and entity hashtags manageable and organized for a tidy Collaborate environment.

Enterprise-Wide Collaboration

Multisite, multi-company organizations need to communicate across boundaries to solve problems and remain responsive to customers. As a cloud-based solution, Collaborate delivers messaging capabilities for intercompany and inter-site conversations. A key feature is the ability to create Enterprise groups that can span locations for greater business efficiency.

Group Messaging

Employees who work in groups can better drive innovation and meet customer expectations. Group messaging (both public and private) is important as members are informed on a timely basis and can offer their perspectives.

U.S. Government Cloud Availability

An option for Collaborate hosted in U.S. Government Cloud is available to meet further security and compliance requirements, such as for government contractors who must comply with ITAR (International Traffic in Arms Regulations).

Microsoft Teams Integration

Microsoft Teams is an industry-leading collaboration platform that combines workplace chat, video meetings, file storage, and application integration for businesses. It is widely used and sits alongside Microsoft Office 365® productivity tools. Collaborate integrates to Microsoft Teams so that designated Collaborate groups can share communications outside of Kinetic with Microsoft Teams members, including external guests such as suppliers and customers. Note: This feature requires Microsoft Office 365 level AD.
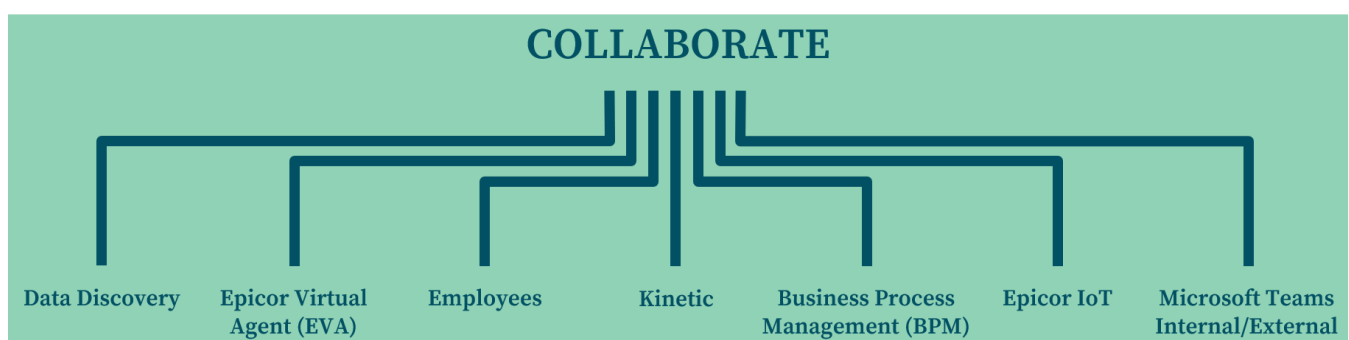
Custom Notifications from Change Data Capture (CDC) and Business Process Management (BPM)

Better and timely responsiveness from workers can be more easily achieved with instant notifications from your unique business processes in a Collaborate message stream. To that end, Collaborate lets admins create custom notification rules using the Change Data Capture (CDC) management solution.

Additionally, admins can add a new "Notify Collaborate" action to their Business Process Management (BPM) workflows to post custom notifications in a Collaborate message stream. Admins can leverage Data Directives, Method Directives, and Epicor Functions to create workflows that include the Notify Collaborate actions and the action that triggers it.

Operational Efficiency from IoT Notifications

Epicor IoT combines the power of Microsoft Azure IoT Hub with data and context from Kinetic to connect systems, sensors, machines, and people like never before. Boosting operational oversight to deliver great performance with Epicor IoT is easier for workers with IoT notifications within Collaborate message streams. Admins can configure IoT-based notifications via BPM and feed them into Collaborate. This allows workers to be notified of asset performance while collaborating with a group of stakeholders on failure situations.

COLLABORATE

| Data Discovery | Epicor Virtual Agent (EVA) | Employees | Kinetic | Business Process Management (BPM) | Epicor IoT | Microsoft Teams Internal/External |

"The rise of the collaborative workforce and workspace is underway. Increasingly, tech-savvy mobile users are ready for collaborative workspaces with deep integrations to the software they use daily. Collaboration is a key element that helps create the future of work."

—*Wayne Kurtzman, Research Director | IDC's Social and Collaboration Solutions*

Instant Answers with Epicor Virtual Agent (EVA)

EVA helps users automate mundane tasks such as looking up a customer or inventory information—all she needs is a simple text command. Integration with Collaborate supports EVA skills or commands within message streams. In Collaborate, ask EVA to show you a customer and EVA will return richly formatted information. The skills supported are the same as what is offered in the EVA mobile app.

File Sharing Support

Collaborate users can share files easily, selecting their preferred choice of cloud file storage system from which a message attachment can be retrieved. Attaching files in the feeds and conversations accelerates comprehension of the discussion topic.

Collaborate integrates with multiple cloud storage providers such as Google Drive® or Dropbox®. Epicor ECM (the new name for DocStar) is also an option for Collaborate file storage, no matter whether Epicor ECM is Cloud or On-Premises.

Actionable Data Discovery Metrics Drive Improved Productivity

More easily describe exceptions and opportunities by grabbing a metric from Data Discovery or Home Page widgets and inserting into Collaborate messages exactly as they appeared at that instant in time. Message recipients can drill down into the metric to help find root causes and comment on their findings.

EPICOR.

We're here for the hard-working businesses that keep the world turning. They're the companies who make, deliver, and sell the things we all need. They trust Epicor to help them do business better. Their industries are our industries, and we understand them better than anyone. By working hand-in-hand with our customers, we get to know their business almost as well as they do. Our innovative solution sets are carefully curated to fit their needs, and built to respond flexibly to their fast-changing reality. We accelerate every customer's ambitions, whether to grow and transform, or simply become more productive and effective. That's what makes us the essential partners for the world's most essential businesses.

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