



EPICOR SOFTWARE CORPORATION

IT Service Management (ITSM)

A well-functioning IT infrastructure is essential for the quality and continuity of business processes within an organization. This places demands on the IT department to answer questions quickly, fix problems immediately and find ways to prevent issues in the future—all while maintaining service levels and adding value to the business. IT failure can have a significant impact on an organization's longevity let alone performance. Increasingly, IT departments are under pressure to align IT with strategic business goals and needs, improve performance, and make IT costs more transparent. In order to meet these objectives IT managers require structured solutions and guidelines.

IT Service Management (ITSM) helps ensure business goals are met and value delivered by providing both the business and the IT department with a common set of best practices and tools.

ITSM also plays a key role in compliance management. With regulatory and legal requirements such as SOX, BASEL II, COBIT, ISO/BS, and HIPAA organizations need to provide transparency and accountability in business processes and corporate accounting. ITSM delivers the tool set to manage, control and mitigate the risks of IT service processes, aiding organizations to achieve regulatory compliance.

EPICOR

Structured Solution for Success

Using Epicor IT Service Management (ITSM) you can provide your end users with accurate, complete and clear information. You can easily create, trace, summarize and close incidents, problems and change requests. Epicor ITSM enables you to set and monitor varying service levels based on specific agreements, and offers your service desk a powerful structured solution for IT management processes. Epicor ITSM solutions provide a robust set of service management features that support key IT processes outlined by the Information Technology Infrastructure Library (ITIL) version 2 and version 3 and have been certified by Pink Elephant as ITIL compatible for: incident management, problem management, change management, configuration management, and service level management.

The best practices of ITIL along with Epicor ITSM solutions provide IT departments not just the opportunity to learn from the knowledge and experience of people who have faced the same challenges, but the ability to cost-effectively manage the strategic deployment of IT resources and assets. The net result—greater productivity, seamless change management, and efficient IT service.

INCIDENT MANAGEMENT

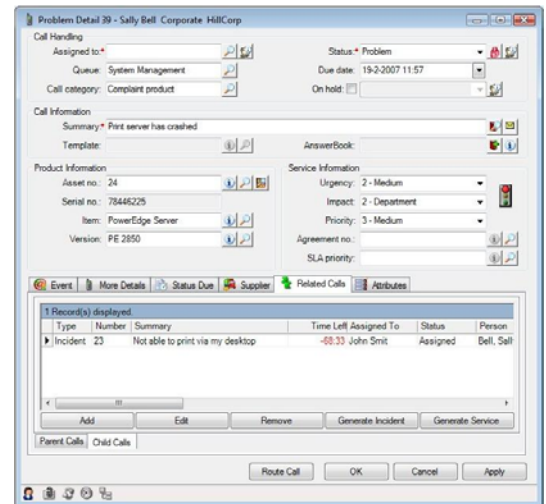
When an incident occurs, the goal of the service desk is to restore normal operation as quickly as possible. At the service desk, all incoming incidents are registered in Epicor ITSM and prioritized and incidents that require a specialist can be immediately escalated to the correct people. Incidents received by e-mail or the Web are registered automatically. Service desk customers can monitor their incident progress via e-mail or online. A knowledge base system allows service desks to build up a searchable set of knowledge and re-use that knowledge—allowing less experienced technicians to answer difficult questions that have been answered before.

PROBLEM MANAGEMENT

A structural problem leads to incidents and therefore to new or repeating calls. Epicor ITSM will not allow incidents to be solved without their underlying cause being eliminated. ITSM allows you to link several incidents to a problem, and once the problem has been solved and closed, all related incidents can be automatically closed.

CHANGE MANAGEMENT

Epicor ITSM helps organizations make changes to the IT infrastructure in a controlled way. Whether the change is required to solve a problem or it is the integration of a new system into your existing IT infrastructure, Epicor ITSM provides a method for requesting the appropriate change, ensuring it receives appropriate approvals and also tracks how long it takes to implement the change. ITSM provides your employees including change approval board (CAB) members with goal-oriented options for implementing a change in a controlled fashion.

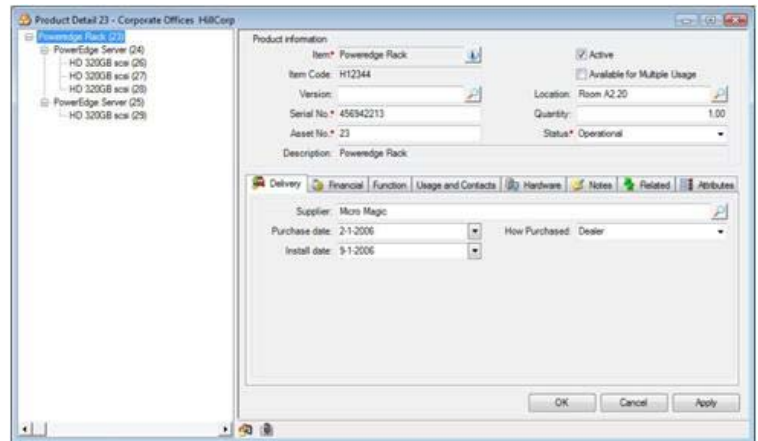


Get a quick win for the Service Desk with Epicor ITSM ITIL certified Incident and Problem Management processes.

CONFIGURATION MANAGEMENT

With Epicor ITSM you can get detailed insight into your IT infrastructure assets. You can easily track your hardware, software and other IT infrastructure components within ITSM.

Thanks to the total overview of information, your service desk can operate effectively and efficiently, saving time for the service desk and money for the organization.



The principle features of the Epicor ITSM configuration management database (CMDDB) include the registration of all configuration items, standard fields that can be extended with user definable attributes, definition of parent child relationships, definition of dependencies, the ability to keep track of an assets lifecycle and history, integration with popular system management tools, integration with remote desktop access tools, and full integration with other Epicor ITSM supported processes.

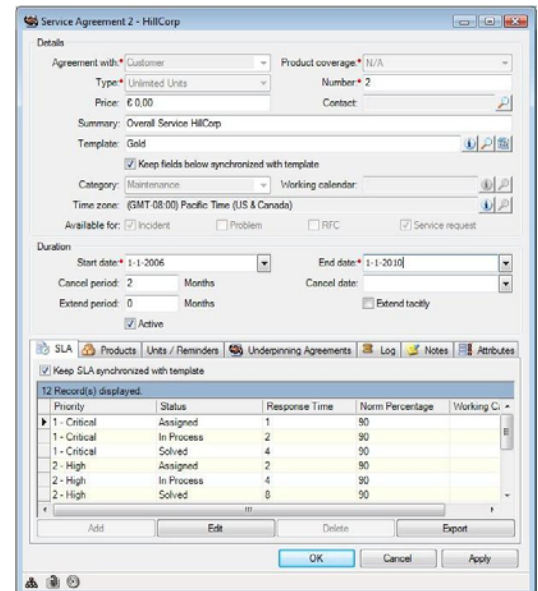
SERVICE LEVEL MANAGEMENT

The level of service provision can be measured by recording service agreements and costs in ITSM. This allows you to offer precisely the correct level of service. It's possible to record service level agreements (SLAs) per configuration or per contact (end user or department).

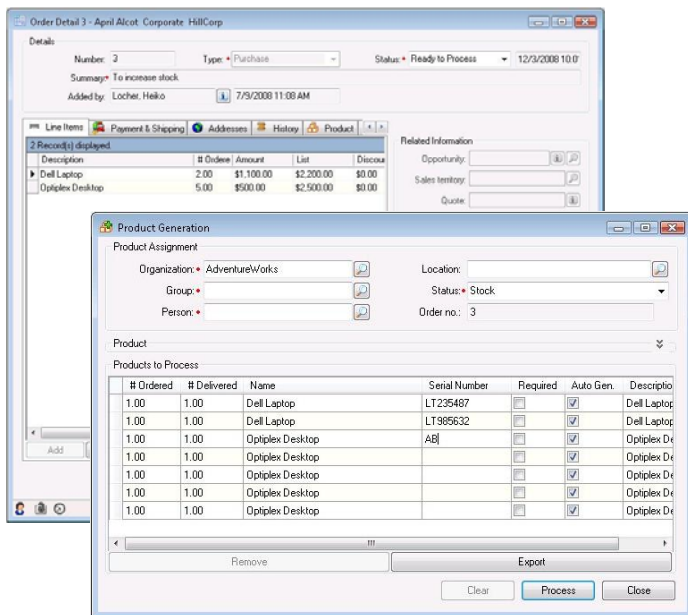
When an incident or problem is accepted, the applicable SLA can be consulted. The response times included in the SLA are used to monitor the queuing and lead times for you.

FINANCIAL MANAGEMENT FOR IT SERVICES

Epicor ITSM also offers you the opportunity to record financial data associated with configurations and products. Purchase value, depreciation term, value after depreciation, warranty date and installation date are captured and tracked. In addition, it's possible to allocate costs to budget holders, departments, sister companies etc. In short, Epicor ITSM makes IT costs transparent.



With Epicor ITSM you can manage your service level agreements on a worldwide basis, including underpinning agreements with suppliers.



Particularly in down markets when effective and heightened cost control places additional challenges on service levels, Epicor ITSM provides a complete financial management solution that spans the needs of the service desk and extends to SLAs and supplier relationship management (SRM). When coupled with Epicor Sourcing and Procurement your IT buyers can maximize their purchasing potential through strategic sourcing and purchasing processes. This allows negotiation and collaboration with suppliers for a win-win relationship, better order management within Epicor ITSM, and delivery against SLA goals.

KNOWLEDGE MANAGEMENT

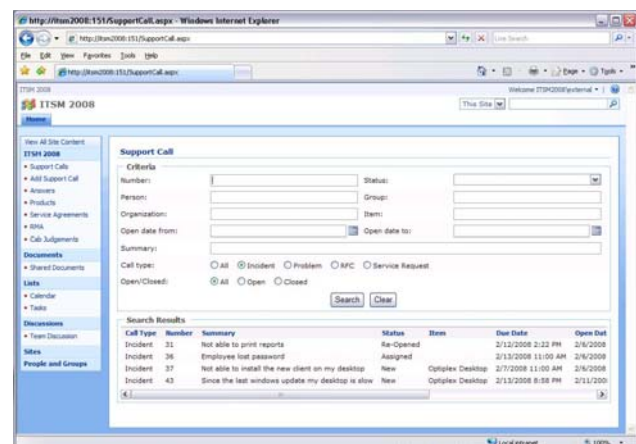
Thanks to Epicor ITSM's knowledge base, you can respond to questions quickly and correctly. Answers can be mailed directly to the customer. In addition, you can place the knowledge base on the Web via the Epicor Self-Service Portal. In this way you can enable your customers to access information and answers whenever it suits them.

EPICOR ITSM SELF-SERVICE PORTAL

Epicor ITSM uses Epicor Portal, built using Microsoft® SharePoint® products and technologies to deliver effective self-service, which improves the efficiency of your service desk. It considerably reduces the number of calls from customers, so that the support technicians can devote their attention to more critical issues. The Epicor Self-Service Portal offers your customers the possibility of getting answers to their questions or solving certain problems without having to call your service desk, saving time for your end users and money for your company. This reliable, integrated application doesn't rest—so that your customers can find answers to their questions 24 hours a day, seven days a week, and 365 days a year.

Epicor ITSM Self-Service Portal can dramatically reduce the number of first-level calls made to your IT support desk, enabling your IT support staff to concentrate on solving more complicated problems, while reducing IT support costs. “Customers” can submit support calls as well as check up on the status of calls they've already submitted. Plus, by placing answers to your customers' most frequently asked questions on the Web, you empower your customers to help themselves to timely information anytime of the day—from anywhere in the world.

Whether searching your Web-enabled Answer Book for a solution, placing a call for assistance, viewing the status of one of their open calls, or checking up on a call's details—your customers remain informed at all times. The result? Customers are happier because they get the same information without having to wait in a call queue or for a call back. And if they can't solve their own problem, they can always submit a call from the Web requesting assistance.



Provide all employees and field-service engineers with self-service for IT issues using Epicor ITSM Self-Service Portal (Portal Server and ITSM Content Packs are available separately).

EPICOR ITSM BUSINESS INTELLIGENCE

Complementing extensive standard reporting capabilities, Epicor ITSM Business Intelligence (BI) offers comprehensive decision support for Epicor ITSM. Based on plug and play Microsoft SQL Server® Analysis Services technology, Epicor ITSM BI provides an ideal means of accessing the exact information required to optimize your service and support processes. During operation, Epicor ITSM creates a significant source of valuable (historical) information. With Epicor ITSM BI, users can perform a variety of (trend) analyses based on accumulated history. It also provides a very detailed overview of your service organization's performance and equips IT teams with an extremely flexible instrument for viewing dynamic information on demand.

PRODUCTIVE USER EXPERIENCE

Epicor ITSM uses a true service-oriented architecture (SOA) comprising a 'smart client' which uses the Internet for communicating with Web services-based business logic, and in turn to a scalable and powerful relational database management system (RDBMS). With Epicor ITSM users are provided with a rich and familiar user interface and a navigation paradigm, which is easy to learn and use. Thanks to powerful search functions you can find specific data quickly and easily, while visual cues clearly show the user the status of important information. In addition, Epicor ITSM supports the attachment of files or Web links to practically every record.

COMPREHENSIVE EXTENSIBILITY

Epicor ITSM integrates into your broader IT framework via Epicor Service Connect, a business integration platform, functioning as a central integration point for secure workflow orchestrations within Epicor applications as well as external connectivity to Epicor and non-Epicor applications. Users can automate tasks and processes within the application to promote continuous performance initiatives and service and support quality within the organization. Service Connect lets your IT teams focus on value added activities and management by exception instead of repetitive data (re)entry tasks. Built to support collaborative processes, Service Connect harnesses the openness of XML and includes service-bus functionality for security, messaging, orchestration, transformation, scheduling, notification, and exception handling.

EASY TO PERSONALIZE AND EASY TO CUSTOMIZE

Epicor ITSM is fully customizable and as such it works in the way your company works, and not the other way round. Using flexible configuration options you can quickly adjust the system to meet user needs, without changing even one line of code. And using the custom attribute capability, you can add custom fields to forms within the application. In addition, Epicor ITSM boasts a complete SDK (software development kit), which uses Microsoft Visual Studio® .NET, for modifying existing screens and business rules. Using the SDK you can develop new ITSM functions by using the information in the Epicor ITSM form and Web services templates.

INTEGRATED WITH MICROSOFT OFFICE

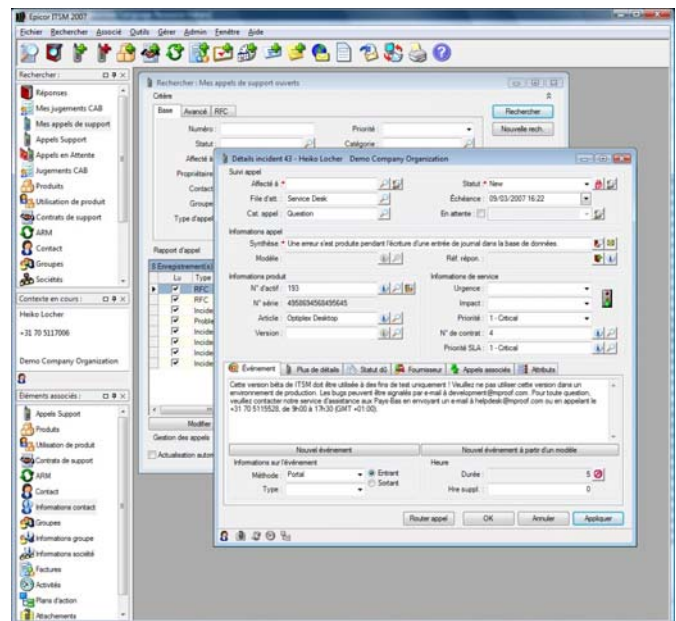
Epicor ITSM features synchronization of contacts, tasks and appointments with Microsoft Office Outlook®. What's more, through the mail merge feature of Microsoft Office Word, ITSM users are able to produce letters and other documents quickly and efficiently from within their working environment. Using pre-defined templates users can manage expired service agreement notices, new employee welcome letters, sales inquiry letters and more.

BUILT WITH MICROSOFT .NET

Epicor ITSM is completely built on the Microsoft .NET framework using Visual Studio .NET and features a true service-oriented architecture (SOA). It is designed for access via the Web, and as such can be installed at a central location while allowing access to users from all over the world. ITSM is specifically designed for use with Microsoft SQL Server, and is extremely reliable and scalable. Whether yours is a small service desk for local management or a large service desk within an international company, you can configure and customize ITSM to suit your needs.

About Epicor and Epicor ITSM

Epicor Software Corporation has long been a recognized leader in building world-class applications. Epicor ITSM is no exception. Targeted at mid-sized to large and global IT departments, and available in over ten languages, Epicor ITSM provides a rich set of features enabling new levels of IT Service Management.



Available in more than 10 languages, Epicor ITSM supports your global IT service desk requirements.

INCIDENT MANAGEMENT

Objectives:

- To provide continuity to the customer by restoring services as quickly as possible, accessibility of the Service Desk for all users, and acceptability of its services

Results:

- Reduced costs
- Makes technology users more productive

Key Features:

- Complete incident history
- An open incident can have any number of events (or conversations)
- Search knowledge base to answer questions
- Classify incidents
- Relate incidents to persons and assets
- Case routing/Queue management
- Collect and share customer notes and feedback
- Route incidents to second line or specialists
- Escalation of incidents based on service levels
- Call owners
- Automated support call notification

FINANCIAL MANAGEMENT FOR IT SERVICES

Objectives:

- To provide transparent cost control and effective ongoing cost management of IT assets and supplier relationships.

Results:

- Negotiate better and stronger supplier contracts
- Costs for IT services are measurable
- Full history of financial information

Key Features:

- Purchase orders
- Sales and replacement orders
- Product generation and serial number registration
- Asset costs and values

PROBLEM MANAGEMENT

Objectives:

- Ensure stability of the IT infrastructure and IT services by structurally and permanently removing errors within the IT infrastructure

Results:

- Resolve incidents quicker and more efficiently
- Reduce the chance of repeating incidents
- Increased Uptime

Key Features:

- Create problems from incidents
- Search knowledge base to solve problems
- Classify problems
- Measure response and resolution times
- Link multiple incidents to a problem
- Link change requests to problems
- Solving problem closes related incidents and change requests

CHANGE MANAGEMENT

Objectives:

- Ensuring that standardized methods and techniques are used for efficient and prompt handling of all changes in order to prevent change-related incidents

Results:

- Faster Changes
- Consistency of infrastructure
- Less Downtime

Key Features:

- Create change requests from incidents or problems
- Manage change requests
- Approve/Deny requested changes
- Measure time from request to change
- Monitor changes done by third parties
- Role based security by request for change (RFC) state

CONFIGURATION MANAGEMENT

Objectives:

- Provide identification, control status accounting and verification of the components of the IT infrastructure

Results:

- Full accounting of all components of the IT infrastructure
- Accurate information available to support all service desk processes

Key Features:

- Full featured CMDB
- Track all IT infrastructure assets including hardware and software
- Product and component level tracking
- Transfer products to new owners
- View history of product ownership and support
- Take control of Windows®-based PCs
- Record relationships between products

SERVICE LEVEL MANAGEMENT

Objectives:

- To ensure agreement to and monitoring of an optimal level of IT service in close cooperation between provider and customer.

Results:

- Customers know what kind of services are offered
- Costs for IT services is measurable
- Customer satisfaction increases through clear support agreements
- Plan due dates of activities based on agreed service level

Key Features:

- Blanket and product-specific service agreements
- Track service agreements with customers and vendors
- Define service level agreements (SLA)
- Track and measure service against SLA
- Service level agreement templates
- Service agreement templates

- Time zone support
- On hold periods
- Extensive RFC classification and decision criteria
- CAB judgment audit trails

ADDITIONAL FEATURES

- Epicor Service Connect API for Party/Customer, Items, Orders, Products (Registration), RMAs, Service Agreements, Support Calls
- English, Dutch, Spanish, French, German, Russian, Estonian, Hungarian, Chinese languages (check for additional language availability)
- Computer telephony interface (CTI)
- User Attributes and groups with full search and auto assignment of attributes
- Software development kit (SDK)
- User definable criteria filters
- Relative date wildcards
- Add custom fields without programming
- Microsoft Word Mail Merge integration
- Microsoft Office Outlook integration
- Full text indexing and searching
- New service or support call from Outlook Inbox
- Follow-ups, Appointments, To-Do's
- Templates improve efficiency
- Integrated email messaging
- Crystal Reports® integration
- HTML Formatting
- Active Directory Import
- Action Plan checklists
- Working time calendars
- Holiday calendars
- User grid preferences
- Read/unread visibility
- Auto refresh of forms



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