Frequently Asked Questions (FAQ) for Epicor Collaborate

Frequently asked questions about leveraging the Epicor Collaborate offering

Epicor Collaborate is a simple to deploy, modern collaboration and productivity tool built on a cloud platform. 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, Collaborate, shifts workers from monitoring analytical dashboards and reports to being actively engaged with instant notifications from ERP processes and events.

What version of Epicor ERP do I need to add Collaborate?

10.2.500+ As the solution is embedded in Epicor ERP, functionality available with each ERP release may differ slightly, depending on ERP capabilities available.

Does Collaborate work with Epicor ERP on premises or cloud?

Yes, it works for both on premises or cloud users of Epicor ERP, but is itself a cloud solution.

Does Collaborate work across plants and companies?

Yes, but you can only see the data from the company you are logged into.

Is there a free version of Collaborate?

No, there is no free version.

How secure is my data in Collaborate?

Built on the Microsoft® Azure® platform, Collaborate is a cloud solution that leverages powerful Azure tools to deliver security and scalability for your data and messaging needs. Users can choose the regional datacenter to host their data.

Where is Collaborate available and my data stored?

Collaborate is available worldwide (with exception of China and Russia) with datacenters in the US and Canada, UK, EU, and Australia. As more are added periodically, contact your customer account manager if one does not fit your needs.

What languages are supported in Collaborate?

Collaborate is supported in 11 languages apart from English. Languages include Traditional Chinese, Simplified Chinese, French Canadian, Mexican Spanish, German, Finish, Swedish, Dutch, Polish, Thai and Indonesian.

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Is Collaborate ITAR Complaint?

At this time, there are no government cloud data centers available with Epicor Collaborate for customers requiring ITAR compliance. Please check with your customer account manager and express your desire to use Collaborate as this is an area of growth. *Epicor does have Government cloud offerings for ITAR users of ERP, just not the Epicor Collaborate module at this time.*

Is Collaborate GDPR Compliant?

Yes

Is Collaborate available on a mobile device?

Absolutely, there are two ways that users can leverage the power of Collaborate on a device. As Collaborate is part of the Active Home Page, Epicor Users can leverage device access through using their Active Home Page on a device with Collaborate running. Secondly, Microsoft Teams offers a mobile application and through integration with Collaborate, users can collaborate across teams and with users in ERP through that integration. There is no separate mobile app just for Collaborate.

Can I use collaborate to interact with my customers and suppliers? Users external to my organization?

You can integrate with Microsoft Teams and invite non-ERP users to Microsoft Teams connected to Collaborate. Messages will flow between Collaborate and Microsoft Teams with this integration. These external users can be your partners, customers and suppliers.

Can BPM notify through Collaborate instead of email, form messages, etc.?

Yes, you can configure BPM notifications post custom notifications in a Collaborate message stream through a new Notify Collaborate action. Users can leverage Data Directives, Method Directives, and Epicor Functions to create workflows that include the Notify Collaborate actions and the action that triggers it.

Can I build my own notification rules?

Yes, Collaborate lets users create custom notification rules. This is achieved with the Change Data Capture (CDC) management solution.

What is needed to use Microsoft Teams Integration?

Microsoft Teams Integration does not work with the free version of Microsoft Teams. It requires Microsoft Office 365 level AD which is an additional purchase. Microsoft has offered trial licenses in the past and these licenses are available direct from Microsoft. To learn more about Microsoft Teams, visit the website for [Microsoft Teams](#).

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Can I add files and attachments in Collaborate?

You can add hyperlinks to your attachments hosted in any document storage system (like Google Drive, One Drive, Dropbox, Sharepoint, etc.) in the collaborate post.

How is Collaborate different than Slack, Yammer and MS Teams?

Collaborate allows users to work around your business data, events and entities within your ERP system. Your team can collaborate around a customer or a sales order, while also being notified about a business exception and event through self-service notification.

If I start using Collaborate in an on-premises deployment with 10.2.500 and Epicor upgrades to 10.2.600, does Collaborate stop working?

No, the beauty of having a cloud solution is that we upgrade your functionality for you and you get to start using the new features immediately, even though you are still on 10.2.500. Features that require changes to Epicor ERP will not be available until upgrading to the release where those features were made available. For example, the below diagram demonstrates the new features available for both 10.2.500 and 10.2.600 users.

Collaborate 10.2.600 Feature	Will it work with Epicor ERP 10.2.600?	Will it work with Epicor ERP 10.2.500?
Access feeds across ERP application	Yes	Yes
Simple, 3 step process for getting started	Yes	Yes
Availability for cloud customers	Yes	Yes
Automated upgrades	Yes	Yes
Embedded experience within ERP	Yes	Yes
Availability for on-premises customers	Yes	Yes
Conversational UI	Yes	Yes
In-app callout (mentions) and upvote	Yes	Yes
Follow ERP entity	Yes	Yes
Differentiate between read and unread posts	Yes	Yes
Languages supported (11)	Yes	Yes
Rich text formatting	Yes	Yes
Follow ERP entity	Yes	Yes
Follow notification rules	Yes	Yes
Home screen widget	Yes	Yes
Real-time auto refresh of feeds	Yes	Yes
Open linked ERP entities directly from the feed	Yes	Yes
Attachment links	Yes	Yes
Quick access panel for entity feeds	Yes	Yes
Standard notification rules (28)	Yes	Yes

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Social media concepts (hashtag, repost, mentions and upvote)	Yes	Yes
Kinetic Design modern UX	Yes	
Group collaboration	Yes	
Integration with MS Teams (External Users in Groups)	Yes	
Drive actions on business metrics through EDD widget	Yes	
Automate tasks using EVA within Collaborate	Yes	
Optimize asset utilization through IOT notifications in Collaborate	Yes	
BPM based alerts	Yes	
Custom notification rules creation	Yes	

Are users on earlier versions (10.2.300 and 10.2.400) that are not able to use Epicor Collaborate, able to purchase Epicor Advanced Social Enterprise and implement the solution?

As of the release of 10.2.500, Epicor Social Enterprise is moving into sustaining for all versions and not available for sale against any of our releases.

For Users of Social Enterprise

If I have Epicor Social Enterprise today, do I get Epicor Collaborate when I upgrade to 10.2.500/10.2.600?

No, Epicor Collaborate is a cloud offering only and must be purchased separately from Epicor Social Enterprise

Can I use both Epicor Social Enterprise and Epicor Collaborate at the same time?

Epicor does not support this configuration in a production environment. In some cases you may be able to get this to work in a test environment. This is not a supported deployment.

Is there a migration of data from Social Enterprise to Epicor Collaborate?

There is no standard data migration available. Epicor professional services can assist existing users of Social Enterprise to move their data if needed on a case by case basis.

Questions? Contact chansen@epicor.com.

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