Epicor iScala Feature Summary
iScala 2022.1

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iScala Versioning Change

Starting with this release, iScala uses a new versioning sequence that includes a year the product was released, e.g., iScala 2022.1.

Application Modules and Features

General

MTD Tax Box Report

The system now supports new report based on the iScala Reporting Platform: MTD Tax Box Report.

The report prints necessary information on the invoices forming the amount for all the Tax boxes in the given period. For detailed information, refer to the MTD Tax Box Report section in iScala Help.

Affected modules: GL.

Epicor Service Connect is not affected

Tax Registration Countries

The functionality covering the mechanism for filtering the tax reports with respect to the country where the tax is to be paid is implemented.

The functionality is supported by:

- Support multiple tax registration countries (525) feature activation key.
- Tax registration country and Tax registration number country codes.
- Tax Registration Country parameter (in all main iScala modules).
- TaxRegistrationCountry element in Customer Invoice Out, Supplier Invoice Out, Sales Order Out, Service Order Out, Project Out ESC (.xml reporting).
- TaxRegistrationCountry column (SSRS reporting) in the following datasets: (DllInvoiceHeader, ORSalesOrderHeader, PLInvoice, PLTaxTransaction, SLInvoice, SLTaxTransaction.

Affected modules: CM, DI, GL, OR, PL, PC, PR, SC, SL, SM.

Epicor Service Connect is affected: Managers: Service Invoice Out, Project Invoice Out, Contract Invoice Out, Sales Order Out.

Inherit Report File Name Templates from Company 01

Starting in iScala 2022.1, the system supports inheriting the Report File Name Templates.

For detailed information on the functionality, refer to Inherit Report File Name Templates from Company 01 in iScala Help.

Affected modules: GL, SL, PL, PR, SM, CM, SC, SY.

Epicor Service Connect is not affected.

Inherit Dynamic Email Address Setup from Company 01

Starting in iScala 2022.1, the system supports inheriting the Dynamic Email Address Setup.

For detailed information on the functionality, refer to Inherit Dynamic Email Address Setup from Company 01 in iScala Help.

Affected modules: GL, SL, PL, PR, SM, CM, SC, SY.

Epicor Service Connect is not affected.

Job Monitor

Starting in iScala 2022.1, the system supports **Job Monitor**. The functionality is implemented to replace the obsolete **Print Monitor**.

Job Monitor supports all the jobs existing in iScala: invoicing, journal posting, document printing, report printing and calculation jobs.

Job requests may be initiated by:

- External systems (third party solutions): the Job Request In and Print Request managers.
- Triggered business events (e.g., a delivery or receipt of goods are registered in iScala).
- Schedule in Administration Console.

For detailed information on the functionality, refer to the Job Monitor, Job Request In managers, and Print Request, Job Request business documents.

Affected modules: N/A.

Epicor Service Connect is affected. Managers: Job Request In.

Financial Modules

Multi-Language Support in Configurable Financial Reports

Starting in iScala 2022.1, you can create the multi-language Configurable Financial Reports, i.e., enter the names of the report elements in any language supported by iScala and print the report on this language.

The system now supports adding/editing and deleting language dependent descriptions in: Row Sets, Column Sets, Categories and Report Definitions.

Affected modules: GL.

Epicor Service Connect is not affected.

Exporting/Importing CFR Definitions

Starting in iScala 2022.1, the system supports exporting/importing configurable financial reports definitions. The functionality is covered but the following routines:

- Export
- Import

Affected modules: GL.

Epicor Service Connect is not affected.

Tax Reporting in the UAE if the Base Currency is not Dirham

The UAE Tax Reports functionality is enhanced to meet necessary VAT requirements. Both the VAT Return Report and the FTA VAT Audit File (FAF) are extended to support the situation when the base/accounting currency is not dirham (AED).

Affected modules: GL.

Epicor Service Connect is not affected.

Setting Period Closing Parameters

The **Open from Period (GL)** option is extended and supported by the Strict control of Open from Period and Keep BE-Date in Closed Period parameters.

The **Strict control of Open from Period** parameter is designed to activate the option to set **Open from Period** for all modules when **Open from Period (GL)** is changed. When the parameter is enabled, a transaction is accepted if the accounting period is open for both the receiving module and the general ledger.

The **Keep BE-Date in Closed Period** parameter is designed to stop the BE-Date moving to a date in the first open period when the imported/set date is in a closed period.

Affected modules: GL.

Epicor Service Connect is not affected.

Scheduled Creation of Payment Proposals

Starting in iScala 2022.1, the system supports scheduled creation of payment proposals. The functionality is supported by the following options:

- Creating Automatic Payment Proposal.
- Save Selections.
- PL-PAYMENT-PROPOSAL-CREATE job.
- PROCESS PRINTING REQUEST business document.

Affected modules: PL, SY.

Epicor Service Connect is affected. Managers: ScaWPrintRequest.

Calculated Columns and Rows in CFR

Starting in iScala 2022.1, the system supports calculated columns and rows. The values in the corresponding report entries are calculated using other (non-calculated) report entries. Now it is possible to specify any rational function as a calculation formula.

Affected modules: GL.

Epicor Service Connect is not affected.

New Time Spans in CFR

Starting in iScala 2022.1, the Configurable Financial Reports (CFR) functionality is enhanced and now includes:

- New **Time Spans**, that could be selected when entering or adjusting the column sets: (Date, Reporting Period to Date, Year and Year to Date).
- New CFR report parameter - **Report Date**. The parameter could be set when creating a configurable financial SSRS-based report and is printed in the report header. The parameter influences the calculations for the columns with the new Time Spans: Date, Reporting Period to Date, Year to Date mentioned above.
  For details on new Time Spans and the Report Date parameter, refer to Enter/Adjust Column Sets in iScala Help.

Affected modules: GL.

Epicor Service Connect is not affected.

Passed Date in Payment Proposals

Starting in iScala 2022.1, the system allows setting Payment Date to a passed date in automatic payment proposals. The option is supported by the Allow payment date in the past parameter.

Affected modules: PL.

Epicor Service Connect is not affected.

Printing Sales Order Quotations via SSRS

The system supports a new SSRS-based Quotations Report as a part of the iScala Reporting Platform functionality.

Affected modules: OR.

Epicor Service Connect is not affected.

Access restriction to company consolidation account mapping

Starting in iScala 2022.1, configuration and execution of consolidation require that the user has the permission to login to the source and the target company.

Affected modules: GL.

Epicor Service Connect is not affected.

Report Tax Return (Norway)

The Report Tax Return is for use with Norwegian Electronic Tax Reporting. It follows the Norwegian requirement to submit TAX reports directly from the ERP systems as of January 2022.

Affected modules: SY.

Epicor Service Connect is affected. The new workflow ReportNorwegianTaxReturn is added to the XMLReportGenerator package.

QR Invoice (Switzerland)

By 30 September 2022, QR invoicing becomes a standard in Switzerland. Starting in iScala 2022.1, invoices created in Purchase Ledger coming with the QR information, QR-IBAN and QR-Reference are flagged as a 'QR-Invoice'. When sending the SEPA pain.001(CH), the QR information is included, and the invoice flagged with QRR.

Epicor Service Connect has been extented with the workflow AutoPayments\SendSEPAPaymentCH. The workflow is based on SendSEPAPayment where the internal iScala SEPA message is converted to a pain.001.001.03.ch.0 message.

Reconciliation of QR invoices is supported in General Ledger → Optional Modules → Cash Management → Link and Update Statement to Invoices screen.

Affected modules: PL, SY, GL.

Epicor Service Connect is affected. Managers: Purchase Invoice In, Supplier Invoice In, SEPA Payment Out.

Presentation of Pricing

When entering Sales Order and Purchase Order lines, the Price Query (Sales Order) and Prices and Contracts dialogs (Purchase Order) have been enhanced.

Sales order line Price query:

- Pricing from a sales contract – The order line is linked to a sales contract if the order header links to the contract, (a) the stock item and the warehouse of the contract line is equal the stock item and the warehouse of the order line, (b) the date of the order line is within the min-/max date of the contract line, and (c) there is enough left on the contract [a AND b AND c]. Contract price source has the highest priority.

- Pricing from customer specific pricing – if customer specific pricing for the item is registered. The customer specific price has higher priority than the price lists.

- Price lists - the default price for the stock item is defined by the price list with ID 00. If additional price list is defined, and is specified in order header, such price list override the default price list 00.

Purchase line Price query:

- Purchase line price query consists of 2 parts, purchase prices and/or contracts.

- Pricing from supplier specific pricing – if supplier specific pricing for the item is registered.

- Purchase contracts - purchase contracts pricing information is shown in the next screen after purchase prices if there are available purchase contracts which applicable to the order line.

Affected modules: PL, OR.

Epicor Service Connect is not affected.

Control the bookings of payments received via ESC

Starting in iScala 2022.1, the payment managers support controlling the granularity of the booking of the payment. The functionality is supported by:

- The manager configuration parameter TransactionConsolidation controls the granularity of the accounting transactions.

- The manager configuration parameter MergeBankAccountBookings controls the granularity of the bookings to the cash/bank account.

Affected modules: N/A.

Epicor Service Connect is affected. Managers: ScaWPLPaymentIn, ScaWSLPaymentIn.

Service, Project, and Contract Management

Discount Schema in Service Order Header

The system supports new functionality - **Discount Schema in Service Order Header**. The functionality is controlled by the Discount Schema and Discount Date parameters. When a discount schema is changed in an order header, the material lines that are not frozen are updated and recalculated.

The functionality is supported by:

- Entering Service Order Header Page 2 – Payments
- Service Order business document
- Service Order Response business document
- Service Quote Response business document

Affected modules: SM.

Epicor Service Connect is affected. Managers: Service Order In, Service Order Out, Service Order Quote Request.

System Administration

Printing of Journals in the Jobs

The Journal Posting Jobs section describing operations with jobs, posting various accounting journals is updated to support new enhancements. For detailed information on the functionality, refer to Journal Posting Jobs in iScala Help.

Affected modules: N/A.

Epicor Service Connect is not affected.

Advanced Payroll Administration

Report Output Path

Server-side script-based reports support defining an alternative file path where the output file will be saved.

Affected modules: WPA.

Epicor Service Connect is not affected.

Technical Features

Administration

Sorting in iScala Administration Console and Workflow Designer

System supports bi-directional sorting in flat and hierarchic lists in:

- iScala Admin Console: Security folder, - Tasks/Active tasks/Assignments and Add Users dialog. Multiple selection is enabled when working with user groups in User Properties dialog within Security-Users-User Properties.

- Workflow designer: - Process properties/Users; - Task element properties /Users and Add Users dialog; -Poster element properties/…channels.

In many of these functions, the last sorted column and sorting direction are preserved across runs.

Multi-company-year bindings for Scheduled Events and Jobs

Both **Business Event Scheduling** and **Job Scheduling** functionality has been extended to allow binding of scheduled events and jobs to multiple companies and years.

The scheduling wizard includes a grid, with companies and years visible to the user. A number of grid features are available for use, such as hiding companies that are not included in the schedule or selecting all available financial years for a company.

General

The iScala Log On Window Improvements

The iScala **Log On** window now presents the list of companies and the list of financial years with the possibility to filter the companies by name, as well as sorting the companies and years.

The **Advanced** pane of the dialog is now dynamic and only shows options relevant to the current environment, allowing more space for the company and financial year lists.

For detailed information, refer to the Logging On section in iScala Help.

Enhancements in the Attachment Dialog

The Manage Attachments dialog box is updated to support new enhancements:

- The system supports adding multiple files to the **Manage Attachments** dialog box by dragging and dropping them directly from a folder to the dialog box or to the field/cell you are working with (the Manage Attachments dialog box opens).

- The system supports sending the attachments by email.

For detailed information on the functionality, refer to Managing Attached Files in iScala Help.

Relaxed Filter Restrictions for CJK Ideographs

When assessing whether the filter term for iScala menu, query/snap search results, lists of table columns/tables in Snap Search Builder is complete, the restriction from "at least 3 characters" is changed to "at least three characters OR at least one CJK Unified Ideograph" from one of the predetermined Unicode ideographic ranges.

Multiple iScala Application Servers

Overview

To increase performance, iScala enables distributing the workload between multiple Application Servers. If you encounter issues with slow and overloaded iScala system, or there is a need to process a large number of business operations in a limited time, then deploying additional iScala application server(s) in your installation is a solution. As the result of a thorough performance testing, Epicor estimates that by doubling the number of Application servers, one may expect performance increase by 1.5 – 2 times. The load processed on the system in an acceptable time also increases, in this case by 1.5 – 2 times.

Multiple Application Servers are classified as **Primary** and **Secondary** servers, also called **Worker nodes**. The following are the main aspects of the iScala Multiple Application Servers architecture:

- A (single) **Primary** server plays central role in the installation. It hosts iScala system services and iScala COM+ applications. Hosting iScala system services the primary server orchestrates all the iScala installation. Hosting iScala COM+ applications it executes the server part of iScala business code.

- A **Secondary** server hosts only iScala COM+ applications, its task is the execution of the server part of the business code.

- ScaLogon system service redirects to appropriate iScala application servers iScala clients creating and accessing server business components. The load on the system created by iScala server business components is split between several application servers.

- If for a task (executed at certain moment in a certain company) the assigned Secondary Server fails (becomes invalid or inaccessible), the task is serviced by the Primary (backup) server.

Implementation Notes

Multiple iScala Application Servers functionality may be used by all customers who installed iScala 2022.1 and later versions. The functionality is not licensed.

The following highlights iScala Installers changes:

- **iScala Server installer** supports two distinct installation modes, allowing users installing a server as either **Primary** or **Secondary** Application server. The Primary Server installer enables full set of features available for install, however, for the Secondary Server, the list of available features is limited.

  Note: Once the server is installed, it is not possible to change its role. If you need to switch the Primary server to a Secondary server, or vice-versa, you need to uninstall the server first. To utilize the Multiple iScala AppServers functionality, be aware the iScala Secondary server(s) must be on the same version as the iScala Primary server.

- **iScala Client installer** no longer includes the Job Processing Server installer. This logic is now part of the

Secondary Application Server installer/deployment.

In **iScala Administration Console**, use the Application Servers snap-in to register Secondary Application Server(s) and configure distribution of a processing workload between all servers in your installation.

For more information on Multiple iScala Application Server deployment, see the **iScala Installation and Upgrade Instructions Guide** located in the <iScala installation folder>/Tutorials/Release Documents folder.

Reporting

Crystal Reports SP32 Runtime

The system now uses SAP Crystal Reports runtime engine for .NET Framework, with SP32.

Compatibility

Microsoft Windows Server 2022 Compatibility

The system now supports Microsoft Windows Server 2022.

Windows 10 Version 21H1 Compatibility

ESC Client was verified to be compatible with Windows 10 version 21H1.

Windows 10 Version 21H2 Compatibility

ESC Client was verified to be compatible with Windows 10 version 21H2.

Windows 11 Version 21H2 Compatibility

ESC Client was verified to be compatible with Windows 11 version 21H2.

Service Bus Runtime Updated

Service Bus Runtime used in Service Bus communicator is updated to the new implementation. Since this new version only supports Azure Service Bus and does not support Windows Service Bus, support of Windows Service Bus in Service Connect input and output channels is removed as well. Storage of Service Bus credentials is improved.

VBA Integration

VBA - Extend access to MultiSelectionGrid

Starting in iScala 2022.1, the Multi-selection Grid (the ISfwMultiSelectionGrid interface available through the SfwMultiSelectionGrid and SfwMultiSelectionGridCntrl coclasses) is extended and supports new options; the SfwMultiSelectionGridCntrl also exposes new events.

Additions to the ISfwMultiSelectionGrid interface provide the ability for VBA to:

- Query multi-selection control mode (single- or multi- selection) and whether secondary fields are enabled.
- Retrieve the number of rows/columns.

- Convert from row index to row key and back.
- For a cell:
    - Retrieve primary cell value as the typed variant (if conversion is successful) or as a string (if conversion is not successful since the actual value does not match the expected type).
    - Retrieve primary cell text (potentially multiline).
    - Retrieve secondary field text.
    - Change cell's background and foreground colors.

Events allow to detect and process events fired when the multi-selection grid is activated for user input, user double-clicks a cell, user changes the checkbox state for a row when the grid is in multi-selection mode, as well as user entry completion.

Epicor Service Connect

Enhancement of the Document Tracking Archive Cleanup

Document Tracking Archive Cleanup is enhanced, providing more control of how trace processes are removed from the Document Tracking Archive tables, allowing activities with different resulting statuses and/or importance levels to be kept for different time periods.

The extended rules are set up in the **Document Tracking Properties** dialog, the **Database Cleanup** tab, **Delete from Archive tables – Delete process by age and within Importance Level**.

The **Importance Level** and **Process Importance Level** attributes can now be viewed for each process and be used for filtering in Document Tracking Views.

Support of Kinetic

iScala 2022.1 is updated and tested to be compatible with Kinetic 2022.1 (11.2.100) and Kinetic 2022.2 (11.2.200).

As of Kinetic 11.2.100, the Epicor/Kinetic WCF services are not provided in the delivery, they are not supported in ESC, so the latest supported version is Kinetic 11.1.200 WCF Service.

Epicor/Kinetic .NET and REST references are supported up to Kinetic 11.2.200.

Support of modern authentication with Password Grant in Office 365/Exchange Online

Service Connect **POP3**, **IMAP**, and **SMTP** channels now support authentication in Office 365/Exchange Online using Modern Authentication with Password Grant to access mailboxes (POP3, IMAP) and to send mail messages (SMTP). As of Kinetic 11.2.100, the Epicor/Kinetic WCF services are not provided in the delivery, they are not supported in ESC, so the latest supported version is Kinetic 11.1.200 WCF Service.

Switching to use this type of authentication requires additional setup to be performed in Microsoft 365 admin center, as

well as updating the setup of POP3/IMAP input channels using mailboxes hosted in Office 365/Exchange Online, and SMTP output channel if it uses Office 365/Exchange Online SMTP server.

It is expected that Microsoft will start disabling Basic authentication for POP3 and IMAP mailboxes hosted on Office 365 and Exchange Online on October 1, 2022 with one-time ability to reenable it until the end of December 2022; customers using such mailboxes with Service Connect are urged to make preparations beforehand.

Please refer to this article which was the latest update at the time this topic was written: https://techcommunity.microsoft.com/t5/exchange-team-blog/basic-authentication-deprecation-in-exchange-online-september/ba-p/3609437

Use of MSAL for Azure AD authentication

Microsoft Authentication Library (MSAL) for .NET as a primary way of obtaining Azure Active Directory tokens. The legacy way of obtaining tokens, using Active Directory Authentication Library (ADAL) for .NET is still available.

Performance of the RequestID selection dialogs is improved

Performance of the Browse dialogs used for selecting target .NET, Web, or REST references is improved, making them more user-friendly in systems with many references.

Performance of the XML Mapper and XPath Builder is improved

Performance of XML Mapper and XPath Builder is improved when working with large XSD schemas, in presence of many links or large XML transformation.

More user-friendly presentation of XPath in XPath Builder

XPath is now formatted in a more user-friendly way, with better indenting and line splitting, both in XPath preview, as well as on XPath editing within the XPath Builder, to make it easier to read.

Performance of sending mails using SMTP output channel without authentication

Sending mails using SMTP without authentication previously triggered SMTP server tarpitting with some of the SMTP servers (Microsoft Exchange, for instance) – SMTP server slowed down its responses to the sender, while accepting the mail transfer. This slowdown is now avoided.

Improved presentation of the links in XML Mapper

Presentation of the links in the XML Mapper is updated to make value-of (with or without enclosing for-each) and copy-of (with or without enclosing for-each) more distinguishable.