

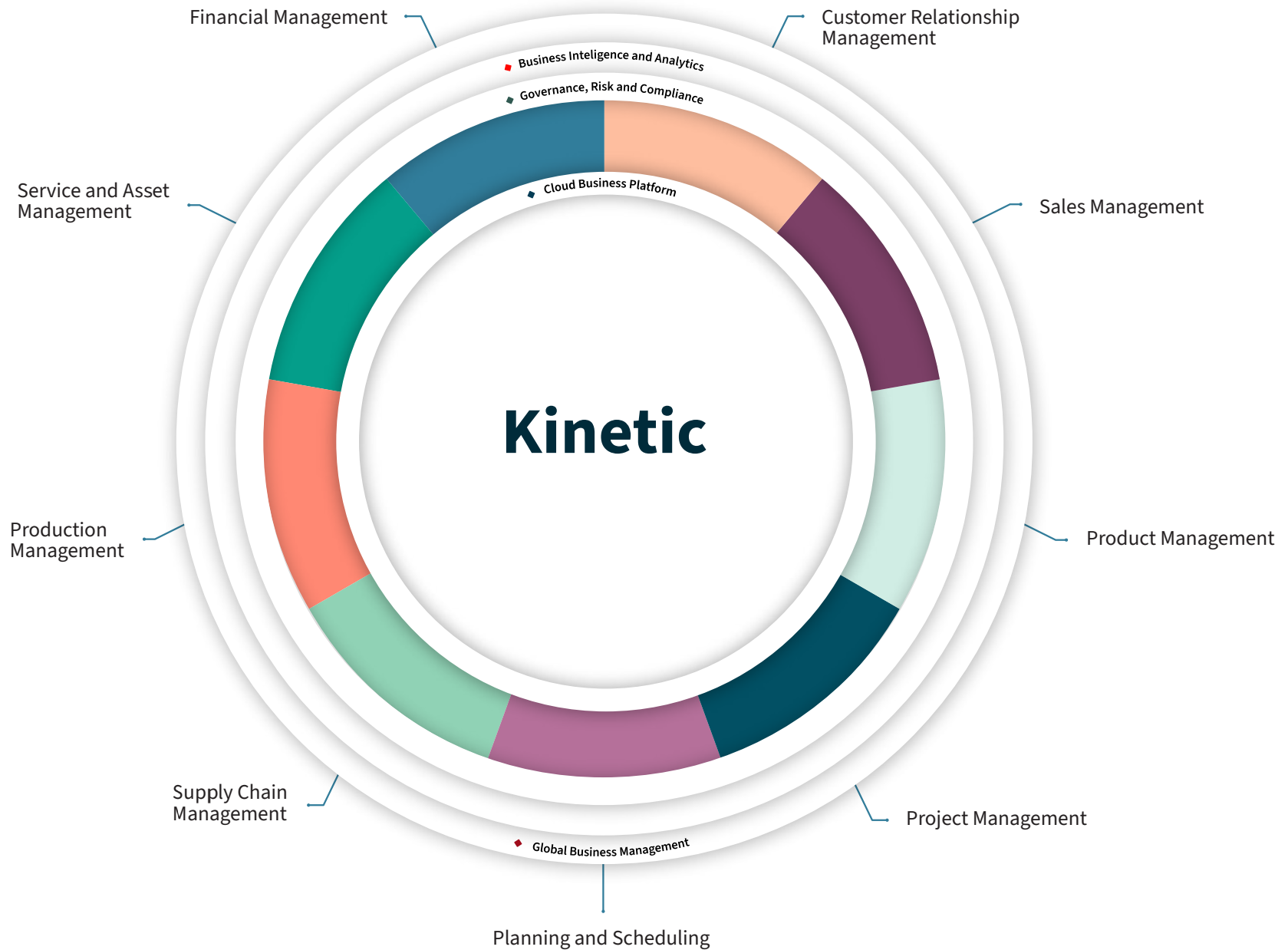
EPICOR

Business Intelligence and Analytics



MANUFACTURING





Financial Management

- Global Engines
- General Ledger
- Accounts Receivable
- Accounts Payable
- Tax Automation
- Financial Reporting
- Financial Planning and Analysis
- Credit Card Payments
- Cash Management
- Credit and Collections
- Asset Management

Sales Management

- Estimate and Quote Management
- Order Management
- Sales Order Automation
- Epicor EDI/Demand
- Management-Point of sale
- Epicor Commerce
- Dealer Portal
- Epicor CPQ

Project Management

- Project Planning and Analysis
- Project Generation
- Project Billing
- Resource Management
- Contract Management
- Planning Contract
- Time Management
- Expense Management
- Epicor Advanced Project Management (APM)

Supply Chain Management

- Purchase Management
- Supplier Relationship Management
- Supplier Portal
- Inventory Management
- Epicor Advanced Materials Management
- Advanced Unit of Measure
- Shipping and Receiving
- Epicor Quick Ship
- Epicor Warehouse Management System (WMS)
- Supplier EDI and B2B Integration

Customer Relationship Management

- Epicor Contact Management
- Epicor Marketing Management
- Epicor Lead and Opportunity Management
- Epicor Case Management
- CRM Mobile
- Integration to Salesforce.com*

Product Management

- Bill of Materials
- Routings
- Engineering Change and Revision Control
- Document Management
- CAD Integration
- Product Lifecycle Management
- Product Costing
- Product Configuration

Planning and Scheduling

- Forecasting
- Master Production Scheduling
- Smart Demand Planning
- Epicor Material Requirements Planning (MRP)
- Scheduling and Resource Management
- Advanced Planning and Scheduling

Production Management

- Epicor Job Management
- Advanced Production
- Kanban Lean Production
- Data Collection
- Epicor Advanced MES
- Quality Assurance
- Epicor Quality Management System (QMS)

Service and Asset Management

- Service Management
- Returned Material Authorization
- Service Contract and Warranty Management
- Epicor Case Management
- Maintenance Management
- Field Service Management

◆ Governance, Risk and Compliance

- Corporate Governance
- Risk Management
- Security Management
- Business Process Management
- Global Trade Compliance
- Electronic Reports Engine
- Environmental and Energy Management

◆ Global Business Management

- Multicompany Management
- Multicurrency Management
- Global Multisite Management
- Multilingual Data Management
- Master Data Management
- Scalable, Distributed Deployment
- Global Engines

◆ Business Intelligence and Analytics

- Operational Reports/Dashboards/IOE/OEE
- Descriptive Analytics (Business and Financial User Reporting/Dashboards)
- Diagnostic Analytics (Scorecards/KPIs, Financial Planning)
- Predictive Analytics (Forecasting)
- Data Warehousing
- Role-Based Analytics and Business Intelligence
- Mobile Business Intelligence

◆ Cloud Business Platform

- Mobile, Browser-Based Experience
- Epicor Automation Studio, Powered by Workato: iPaas + Automations
- Epicor Virtual Agent
- Epicor Collaborate
- Enterprise Search
- Epicor Learning
- Epicor Business Process Management (BPM)
- Epicor Enterprise Content Management (ECM)
- Business Workflow Automation
- IoT and IIoT Applications
- Epicor Commerce
- Epicor ED and B2B Integration
- Electronic Reports Engine
- Epicor Application Studio Configuration
- REST Services and Epicor Functions
- Updatable Dashboards
- Epicor Integration Cloud
- Deployment Flexibility
- Microsoft Azure Cloud
- Security Management
- Data Fabric

Contents

Epicor Financials	6
Operational Reports and Dashboards.....	8
Descriptive Analytics.....	9
Diagnostic Analytics.....	10
Predictive Analytics.....	11





Business Intelligence and Analytics for Kinetic help you answer four essential questions—what happened, why did it happen, what is happening now, and what will happen next? Dashboards, trackers, and data visualization tools built into the core Kinetic platform help you get a better understanding of what is happening in your company right now. Additional modules also provide you with deeper trending, diagnostic, and predictive analytics to bring the future into focus.

**OPERATIONAL
REPORTS/DASHBOARDS**

**PREDICTIVE ANALYTICS
(FORECASTING)**

**DESCRIPTIVE ANALYTICS
(BUSINESS FINANCIAL USER
REPORTING/DASHBOARDS)**

**DIAGNOSTIC ANALYTICS
(SCORECARDS/KPIS, FINANCIAL
PLANNING)**



Become a data-driven organization that can make fully informed decisions at every turn.

Predictive Analytics

Epicor Smart Inventory Planning and Optimization Platform

Epicor Smart Demand Planner

Epicor Smart Inventory Optimization

Epicor Smart Operational Analytics (for inventory)

Smart Forecasts

Descriptive Analytics

Grow
Includes BAQ connection

Spreadsheet Server

Diagnostic Analytics

Epicor FP&A
Reporting, Budgeting, Collaboration, Consolidation, and BAQ connection

Epicor Data Analytics
Includes Advanced MES Analytics

Epicor Data Analytics Financials
Epicor Data Analytics Financial Statements
Epicor Data Analytics Budgeting and Forecasting

Operational Reports and Dashboards

Epicor Advanced MES

Epicor IoT

Business Activity Queries (BAQs)*

Microsoft SQL Server

Reporting Services (SSRS)

Executive Dashboard

Epicor Data Discovery (Standard)*
Epicor Data Discovery IoT Visualization

Deployment Choices

- Cloud
- On Premises

Data Sources

- Epicor Financials Live data
- Data Mart
- Data Warehouse

*Included with Epicor Financials core packages

Operational Reports and Dashboards

To gain insight into everything currently happening enterprise-wide, look to the operational reports and dashboards available in every area of the Epicor Financials system. It all starts with Business Activity Queries—SQL queries throughout the Epicor Financials system made with a visual drag-and-drop wizard. The dashboards provided with Epicor Advanced MES also keep you up to date with what is happening with your machines on the production floor.

The complete list of operational reports and dashboards features:

- Business Activity Queries
- Microsoft SQL Server Reporting Services
- Trackers and Dashboards
- Epicor Advanced MES

Business Activity Queries

Every business needs an intuitive and easy-to-use query engine, which is why Epicor added Business Activity Query (BAQ) in the core platform of the Epicor Financials system—allowing you to create your own or adapt over 800 standard SQL queries. Once created, queries can be used throughout the application to generate SSRS reports for quick searches, view results in a BAQ grid or Epicor Data Discovery view, and much more.

Complete functionality includes:

- BAQ design wizards
- Graphical table links
- Embedded calculations

- Multiple data views
- Analyze/test query tabs
- Updatable BAQs
- Configurable dashboard applications

Microsoft SQL Server Reporting Services

Microsoft SQL Server Reporting Services (SSRS) underpins the Epicor Financials system and provides a flexible reporting structure for delivering professional reports and analysis to business stakeholders in a format that business users can easily consume. It is also used with the Advanced Print Routing for forms printing and routing.

SSRS easily utilizes many types of data and can deliver it in a variety of formats. Because SSRS works with other applications and products in the Microsoft platform— such as Microsoft SharePoint®, Microsoft SQL Server® Analysis Services, Microsoft Office, and Microsoft SQL Server Report Builder—SSRS is an invaluable tool for improved analysis and decision-making in the enterprise.

Trackers and Dashboards

The Epicor Financials Home Page permits the combination of multiple widgets for data views, dashboards, and BAQ grids that provide capabilities like inquiries, ad hoc reports, graphical analyses, tactical business intelligence, alerts, and business monitoring. The Home Page provides a robust, one-stop interface that replaces traditional menu systems with personalized role or context based views and links into core transactions of the system—including real-time, exception-driven indicator flags. Toolled with unique

flexibility, dashboards enable users to develop their own workbenches using a series of online views of information.

From monitoring your employee intranet site, to live access to industry-related websites, each dashboard contains the information you and your employees need to more proactively run your business.

Complete functionality includes:

- Role-based home page
- Real-time exception-driven management
- Real-time access to up-to-date information
- Drill-down trackers
- User-level personalized components
- Custom component generation
- Personalized functionality
- Open to related functionality
- Fully secured web interface



Trackers, Grids, and Charts—Closely manage customer and supplier performance with comprehensive role-based and interactive dashboards that offer a complete picture.

Data Discovery IoT Widgets

Epicor IoT is a Kinetic module that integrates with the Microsoft Azure® IoT Hub. This application monitors and visualizes data from sensors and other Epicor products. Epicor IoT also gathers context and in-depth production data from the Kinetic system. Users gain intelligent insights into the production and day-to-day enterprise activities—achieving deep levels of operational efficiency.

The Epicor IoT Data Discovery widgets added to the Kinetic Home Page alert decision makers in real time to what needs attention on the shop floor and improves productivity as a result. Each machine or device sensor can be set up with a Key Performance Indicator (KPI) setting such as allowable temperature ranges.



Data Discovery—Drag and drop measures and dimensions in the real-time Data Discovery view for new insights.

Descriptive Analytics

Let every department learn from its data with self-service summaries, animated and interactive data visualization, and tools to simplify report creation and sharing. Products that fit this category support analyzing larger amounts of data for short-term historical trending analysis.

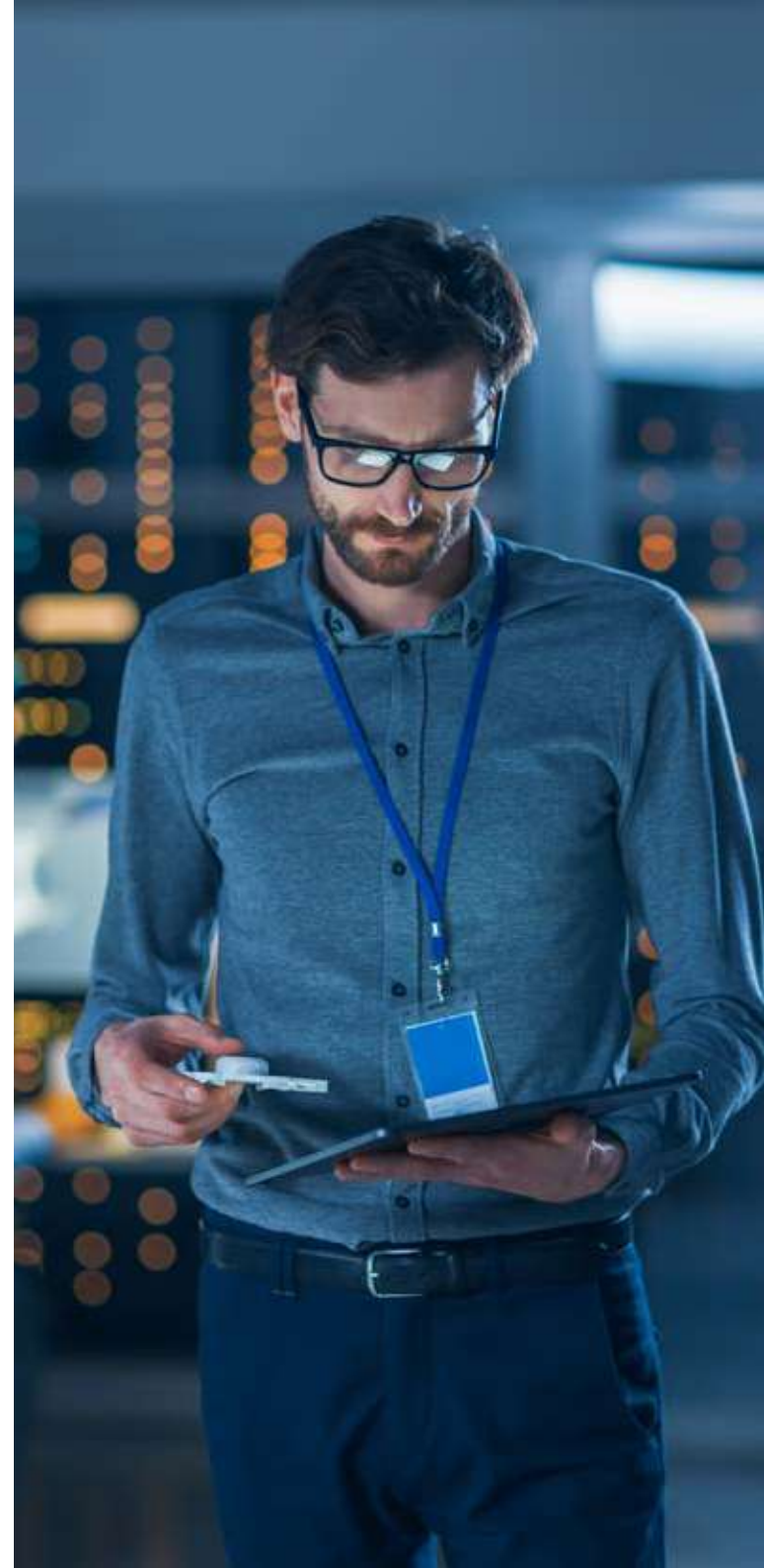
Grow, An Epicor Solution for Business Intelligence

Grow is a Cloud all-in-one business intelligence solution that gives the Citizen Analyst everything they need to connect, blend, cleanse, filter, and store their data and visualize it in dashboards and reports. With Grow, Epicor embeds a more open and connected SaaS-first BI into into the Kinetic Public Cloud platform.

The 75+ Data Connectors to popular Cloud apps and other applications and databases give Kinetic users the freedom to start connecting to their data right away, without waiting for company-wide implementation projects. The unlimited Grow user license gives more employees access to the actionable insights they need to make decisions, without waiting for help from IT or a business analyst. And Grow caters to all user levels: Low-code SQL coding for your technical staff and the ability to do No-code transforms for the non-programmers.

Grow provides a full stack of all necessary components for a complete BI solution:

Extract Transform and Load (ETL) – Grow makes it easy to prepare, cleanse, and transform data across multiple data sources to fuel powerful metrics and dashboards.



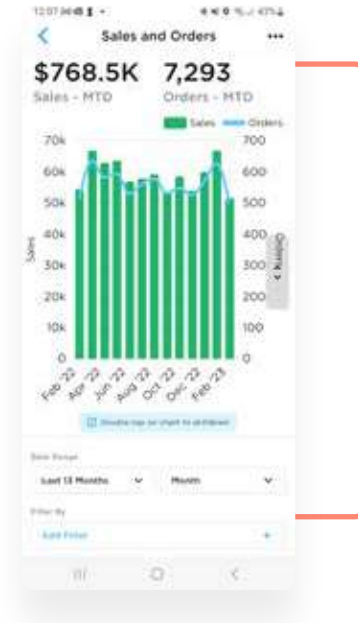
Data Warehouse – Grow imports your business-critical data and keeps the most relevant and current data on hand, so you don't need a third-party data warehouse.

Data Visualization – Easily marry and transform disparate data sources to build metrics and dashboards in minutes, and then filter, slice, and explore different visualizations as you navigate your data to find the best way to surface insights for your business. Grow also includes all currently available Kinetic content packs, and you can easily augment them with BAQ data, any other Kinetic data fields, user defined fields or other data sources like historical databases or spreadsheets. These content packs include:

- Sales
- Production/Project Management
- Material
- Financial
- Field Service
- Maintenance Management



Grow Business Intelligence—Empower everyone to make decisions and measure results against goals with easy-to-understand Kinetic metrics.



Grow—iOS and Android apps provide actionable insights to workers on the move.

Epicor Data Discovery

Data Discovery is a data visualization tool for the Kinetic system. Staff can use their natural visual abilities to quickly spot areas of interest in real-time production data that they might have otherwise missed by just looking at rows and columns of numbers. In the Data Discovery view, users can set filters and drag and drop measures and dimensions to produce rich visualizations—a process similar to manipulating a pivot table in a spreadsheet. They can then focus on a data point or area and drill down into the underlying ERP transactional detail. They can also combine views to create BI dashboards with shared filters and shared dimensions. Driven by real-time BAQs in the Kinetic

system, Data Discovery visualizes short-term, up- to-the-second enterprise data.

Data Discovery is accessible via Kinetic Desktop Client, web browsers, tablets, and modern smartphones. The application is designed to work just as well on low-powered touch devices as it does on a powerful desktop with large screen real estate. Data Discovery automatically adjusts its layout and behavior to the browser and device accessing it. Resizable data cards can be animated to cycle through multiple values like a stock ticker, providing a live feed of production data for applications such as Kinetic Home Page.



Diagnostic Analytics

Analyze long-term, aggregated data to quickly and easily discover why certain product outcomes happened and perform what-if analysis with diagnostic analytics

Epicor Data Analytics

Powered by Phocas, Epicor Data Analytics (EDA) helps companies turn their data stored in Kinetic into actionable insights. EDA is an easy-to-use service in the cloud that takes a unique, intuitive approach to lead you on a journey of discovery through large cubed data sets contained in your data warehouse. With deeper insights, companies can grow by reducing cost, identifying new opportunities, supporting specific programs, and speeding up decision making.

EDA provides customizable and interactive dashboards to make it easy to analyze the data inside your business systems. The dashboards contain visual KPIs, graphs, charts, and tables, so you can quickly review important information about your business performance and make informed strategic decisions. Once you have spotted an area of interest in the visual metrics, the EDA grid is where you conduct most of your analysis, and unlike a spreadsheet, you can “drill down” into the data with a simple click to reveal additional levels of detail—all the way down to the Kinetic transactions—and find your answers.

EDA includes all currently available Kinetic and Advanced MES content packs, and you can easily augment them with any other Kinetic data fields, user defined fields or other data sources like historical databases or spreadsheets.

These content packs include:

- Sales
- Production/Project Management
- Material
- Financial
- Field Service
- Maintenance Management
- Advanced MES



Epicor Data Analytics—Access cloud-based Epicor EDA from desktops or mobile devices.

EDA Advanced MES Dashboards

Advanced MES collects data directly from equipment and operators on the shop floor in real time, minimizing inaccurate and time-consuming manual data collection. Advanced MES provides powerful metrics you need to improve performance—including Overall Equipment

Effectiveness (OEE), run rates, scrap, yield, energy consumption, material consumption, and much more. EDA Dashboards take it a step further by aggregating Advanced MES data with Kinetic data long-term in the Cloud, for trending analysis and diagnostics—find the answers to such questions as why a shipment was late—was it a production problem or a supplier problem?

Financial Planning and Analysis

Epicor offers multiple products for FP&A enabling all businesses of different types and sizes to select their best option. Several products in the following list can also be used in other areas of the business. Refer to the “Financial Management” chapter for more information on these products:

- Epicor Financial Planning and Analysis
- Epicor Financial Planner
- Spreadsheet Server





Predictive Analytics

What will happen next? Plan for success using demand planning and inventory optimization tools in the Smart Inventory Planning and Optimization Platform.

Smart Demand Planner

Smart Demand Planner provides cloud-based statistical forecasting that automatically selects the right forecast model for each item—accounting for trend, seasonality, and promotion- or event-driven demand. Once the baseline forecast is produced, it is available for collaborative review and consensus planning by authorized stakeholders. Forecast accuracy can be measured to help ensure the best possible forecast is delivered to the business at both the aggregate and item mix levels.

Smart Inventory Optimization

Safety stock levels, reorder points, lead times, and order quantity directly influence the service vs. cost relationship. Epicor Smart Inventory Optimization helps you maintain the balance between service and cost by providing inventory policy decision support and the means to share, collaborate, and track the impact of your inventory planning policy. Inventory Optimization reconciles holding costs, ordering costs, and stock out costs in order to prescribe the inventory policy and service levels that yield the total lowest cost. Users can optionally assign service level constraints and targets and propose multiple policies for consideration. Then, they can share proposed policies and agree on a consensus plan that best meets the company's objectives.

Smart Operational Analytics

Smart Operational Analytics is a native cloud-based reporting platform that provides a fast, easily understood, and up-to-date perspective on the state of your inventory and its performance against critical metrics, actual supplier lead times, and opportunities to rebalance stocks across facilities—helping to uncover root causes of operational inefficiencies. Get a 360 degree view of your inventory to identify value, stocking trends, overstocks, understocks, and potential order cancellations. Also identify root causes of stock outs, excess inventory, and late deliveries.



*Epicor Data Analytics Content for Advanced MES—
Discover trends in long-term production data.*



We're here for the hard-working businesses that keep the world turning. You're the companies that make, move, and sell the things we all need. Trust Epicor to help you do business better. Your industry is our industry, and we understand you better than anyone. By working hand-in-hand, we get to know your business almost as well as you do. Our innovative industry solution sets are carefully built to fit your needs and respond flexibly to your fast-changing reality. We accelerate ambitions, whether you want to grow and transform, or simply become more productive and effective.

That's what makes us the essential partner to the world's most essential businesses.

Contact Us Today: info@epicor.com | www.epicor.com

This document is informational only. Epicor Software Corporation makes no guarantees, representations, or warranties to the information and disclaims, any implied warranties, such as fitness for a particular purpose, merchantability, satisfactory quality, or reasonable skill and care. Testimonials are unique to the particular user and may vary. Epicor and the Epicor logo are trademarks of Epicor Software Corporation. Other trademarks are the property of their respective owners. Copyright © 2024 Epicor Software Corporation. All rights reserved. Rev. Date February 29, 2024.

