

Product

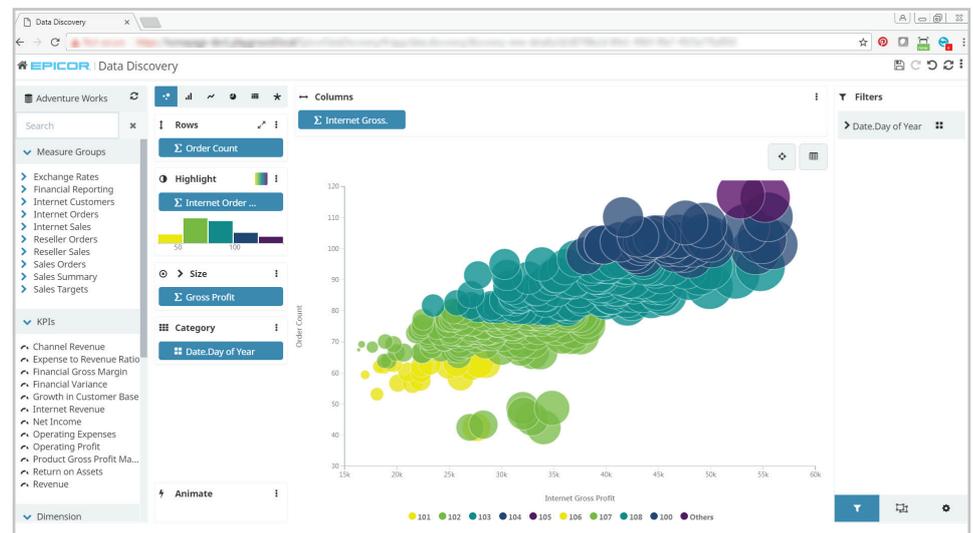
- ▶ Epicor® ERP

Benefits

- ▶ Become a data-driven company able to quickly make informed decisions
- ▶ Attract the next generation of workers with modernized dashboard capabilities for Epicor ERP
- ▶ Display live, role-based, key metrics to workers automatically when they login
- ▶ Visualize, anticipate and preempt equipment and production degradation with Industry 4.0 IoT
- ▶ Drive improvements based on data—not opinions
- ▶ Save time by visually spotting anomalies and automatically drilling down into transactional detail in EDD or Epicor ERP
- ▶ Use as a visual tool for data cleaning efforts
- ▶ Enable employees to access and tailor visualizations in a self-service capacity

Visualizing Real-Time Operational Data

Epicor Data Discovery (EDD) is a data visualization tool for Epicor ERP. With EDD, 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 like 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. Driven by real-time Business Activity Queries (BAQs) in Epicor ERP and other data sources, EDD complements Epicor Data Analytics (EDA)—EDD visualizes short-term, up-to-the-second enterprise data out of the box, whereas EDA provides for longer-term data exploration with full, pre-built content packs, running in a cloud-based data warehouse.



Drag and drop measures and dimensions in the Data Discovery View to gain new insights.

Compare

Line series Grouped bar Stacked bar

Percent of total

Pareto 100% Stacked bar Pie

Correlate

Bubble and dotplot Pivot table

Trendline

- off -
- off -
Cumulative Percent
Average
Moving Average

EDD chart choices.

EDD is accessible via SmartClient, 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. EDD 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 to provide a live feed of production data. Animations can loop automatically or be manually advanced. Data views can be combined into a BI Dashboard with shared dimensions and cross filters and added to Epicor ERP Active Home Page.

EDD Content

A full assortment of 30+ metrics across five role types are included with EDD. These provide great starting points for users to explore in the Data Discovery View or create new metrics.

Executive role

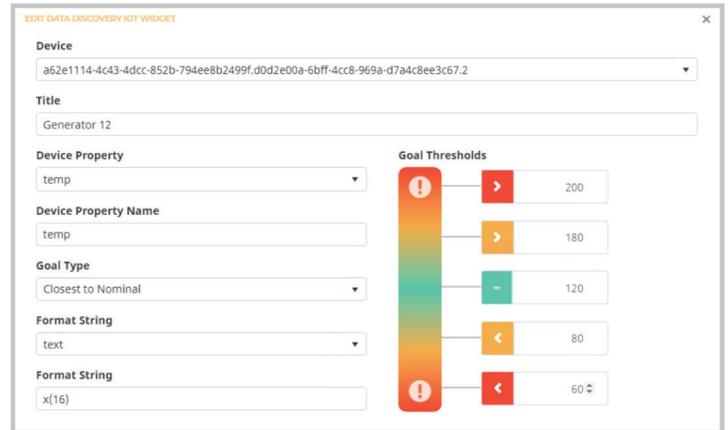
- ▶ Average order total today
- ▶ Gross profit today
- ▶ Sales today
- ▶ COGS vs. profit
- ▶ Orders today
- ▶ Order history

Finance role

- ▶ AR balance
- ▶ AP balance
- ▶ Sales YTD vs. LYTD
- ▶ Customers past due on payments a.k.a outstanding receivables
- ▶ Not invoiced shipments—number and amount
- ▶ Aged payables
- ▶ Aged receivables

Supply chain role

- ▶ Quote win/loss analysis
- ▶ Quotes—count and amount
- ▶ Orders entered quantity and amount (sales) RMAs quantity and amount
- ▶ Obsolete inventory
- ▶ Purchase price variance
- ▶ Open PO count and amount
- ▶ Negative inventory items/out of stock
- ▶ Orders past due quantity and amount
- ▶ Orders backlogged quantity and amount
- ▶ Orders shipped quantity and amount by defined criteria
- ▶ On-time/overdue shipments—counts and percentage vs. total shipped



Color coded indicators with thresholds set up for IoT widgets make it easy to spot the alerts.

Manufacturing role

- ▶ Clean vs. occurrence jobs
- ▶ Manufacturing hours and indirect/downtime hours
- ▶ Job count by status
- ▶ Job cost element breakdown
- ▶ Indirect hours by reason

Project management role

- ▶ Budget vs. actual
- ▶ Completion percent
- ▶ Profit margins

Epicor IoT Widgets

Epicor IoT is an Epicor ERP module that integrates with the Microsoft Azure IoT Hub. This application monitors and visualizes data from sensors and other Epicor products. Epicor IoT leverages Microsoft Azure IoT Hub to gather Epicor ERP's context and in-depth production data. Users gain intelligent insights into the production and day-to-day enterprise activities, achieving deep levels of operational efficiency. The Epicor IoT Data Discovery widget alerts 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.

EDD Card Views and Dashboards in Active Home Page

Active Home page for Epicor ERP is an optional starting point for a user logging in and is where most users will first encounter EDD. A key component of the Epicor Kinetic Framework, Active Home Page contains quick access tiles for regularly used forms, links to other applications, and resizable EDD card views. Four configurable home pages are provided for these role types—executive, financial, manufacturing, and supply chain—and are populated with the appropriate favorites, EDD card views, IoT widgets, and other widgets that can be easily rearranged and resized on the page. Additionally, the "Discovery Dashboard" widget adds an EDD BI Dashboard as a tab in Active Home Page. You can also create custom EDD views and BAQ grids from system BAQs or your own BAQs and add them to your Active Home Page. The easy accessibility of EDD from Active Home Page will promote data-driven decisions in your business.

Typical Usage Stories

“I want to see the ratio of jobs with scrap/rework/nonconformance reported versus jobs with no scrap/rework/nonconformance reported. I want to be able to see this by part number for a user-defined date range. If the user does not choose a part, then all jobs in the time frame should be included.”

—Production Manager

Answer: EDD percentage of jobs without scrap or nonconformance metric

“I need to be able to quickly review—in a KPI—the total count and amount of all overdue AR invoices. I will need to be able to drill into the KPI and see all of the customers that have invoices past due and what the total amount overdue is for each of the customers. I should be able to drill further and see which invoices make up the total amount overdue for each customer and—for each invoice—review how many days overdue it is.”

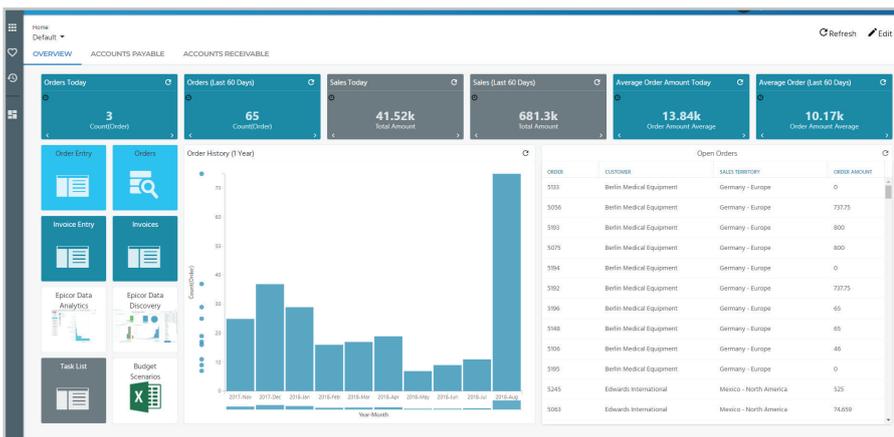
—Collections Manager

Answer: EDD outstanding receivables metric

“I need to be able to see the number of quotes won versus the number of quotes lost within a rolling six-month time period. I also need to see the velocity of the wins and losses, as well as a Pareto analysis of wins and losses. I also need to see the value of these quotes based on the expected value.”

—Sales Manager

Answer: EDD quote win/loss analysis metric



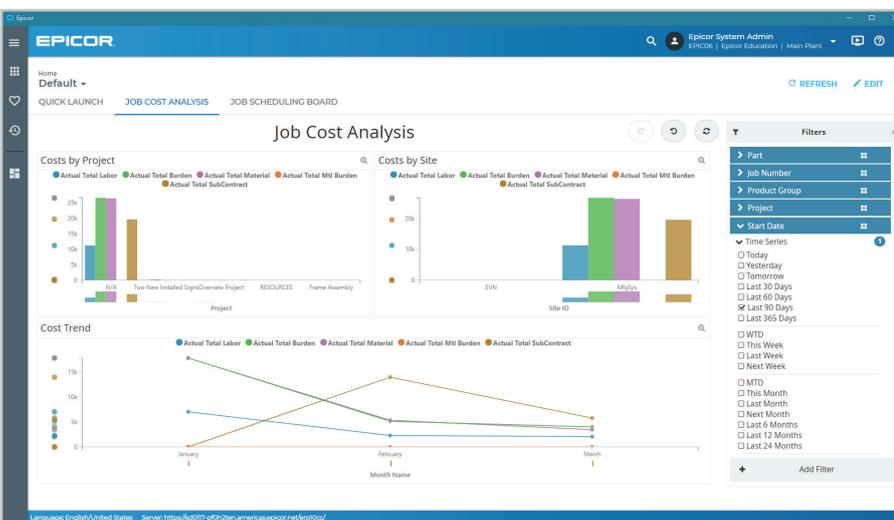
Custom EDD views and BAQ grids can be added to Active Home Page.

EDD Advanced

EDD connects to Epicor ERP BAQs and External BAQs. EDD Advanced allows customers to connect EDD to outside data sources, most notably to multidimensional cubes they have created in Microsoft SQL Server Analysis Services. This allows the EDD BI Dashboard to be populated with both Epicor ERP and external data sources with shared dimensions and cross filters. EDD Advanced also allows log-ins to EDD to be set up outside of the ERP system via Azure Active Directory or local Active Directory with data-level security set by role. Epicor ERP users can still log in to EDD via Epicor ERP login.

Key Features

- ▶ Responsive data views
- ▶ Built for mobile
- ▶ EDD included with Epicor ERP
- ▶ Real-time Epicor ERP operational data
- ▶ Visualizes Epicor IoT data from Microsoft® Azure™ IoT Hub
- ▶ Side-by-side display of EDD views with forms and trackers in Epicor ERP



Discovery Dashboard widget added as a tab in Active Home Page.

- ▶ Open Epicor ERP trackers and forms from EDD selected data
- ▶ BI Dashboard feature allows shared dimensions and cross-filtering between data views.
- ▶ Core includes 30+ key metrics for financials, supply chain, manufacturing, project management, and executives
- ▶ Drag-and-drop editing of visualizations
- ▶ Connects to canned and custom Epicor ERP Business Activity Queries (BAQs)
- ▶ EDD Advanced connects to cubes built in Microsoft® SQL Server® Analysis Services
- ▶ View cards are embeddable and can be animated
- ▶ Tied to Epicor ERP login, and EDD Advanced has additional option of Microsoft Single Sign-On for Active Directory and Azure™ Active Directory

Requirements

EDD is included in the Core packages of Epicor ERP Versions 10.2.100 and higher. EDD Advanced is an additional license or subscription available for Epicor ERP Versions 10.2.300 and higher. Discovery

Dashboard widgets and IoT widgets are available in Epicor ERP Versions 10.2.400 and higher. To view EDD IoT content, a license or subscription for Epicor IoT is required.

Learn More

Discover how Epicor Data Discovery can deliver fresh insight into your business to empower decision makers throughout your organization.

Contact your Epicor sales representative, call 1-800-999-6995, or visit www.epicor.com.

About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software designed to fit the precise needs of our manufacturing, distribution, retail, and service industry customers. More than 45 years of experience with our customers' unique business processes and operational requirements are built into every solution—in the cloud or on premises. With this deep understanding of your industry, Epicor solutions dramatically improve performance and profitability while easing complexity so you can focus on growth. For more information, [connect with Epicor](#) or visit www.epicor.com.

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