

Epicor Data Analytics

Achieving New Levels of Business Insight

Epicor Data Analytics (EDA), powered by Phocas®, helps companies turn their data stored in Epicor ERP into actionable insights. Non-technical users have instant access to data, taking them from easy-to-read dashboards to lightning-fast grids to detailed transactions in a few clicks or taps. With deeper insights into potentially massive amounts of their current and historical data, companies can grow by reducing cost, identifying new opportunities, supporting specific programs, and speeding up decision-making.

EDA is an easy-to-use service in the cloud that can quickly start contributing to your business while helping you avoid error-prone approaches such as spreadsheets and manual calculations that often waste time and resources. It also stays up-to-date with the daily changes of your business and can send you an email when any conditions meet your “red” or “yellow” alert level settings.

EDA provides customizable and interactive dashboards to make it easy to analyze the data inside your business systems. The dashboards provide visual graphs, charts, and tables, so you can quickly review important information about your business performance and make informed strategic decisions. 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.

EDA is a comprehensive end-to-end service delivered and supported by Epicor. It is fully integrated with Epicor ERP, using your data to provide a broad



Epicor Data Analytics—example of an Executive Dashboard



Epicor® ERP

Benefits

Grow your business with deeper insights into:

Productivity and margins

New business opportunities

Performance across operations

Use content packs to:

Better visualize inventory usage

Monitor profit growth

Drill down into lines on the income statements

Maximize inventory effectiveness

Manage quality processes

Analyze resource efficiencies

understanding of your business performance. In addition to logging into EDA dashboards, your co-workers have the options of seeing a live data display via your published public internal dashboard URLs or alternatively, they can login into and explore an embedded view received via email or in a webpage from you. With EDA, you also have responsive mobile access to your data, so you are never disconnected from your information. “Always connected” means you can respond quickly to the needs of your business and keep your organization highly productive. As a cloud-based service, EDA minimizes cost impacts on your current system hardware, software, and maintenance budgets.

Epicor ERP Content Packs

EDA is a complete solution that comes with ERP-specific content “out of the box.” Each of the six Epicor ERP content packs provides starter dashboards and deep integration into a specific set of Epicor ERP data. You have the freedom to build onto these content packs with any additional fields from Epicor ERP and augment from any other data sources, such as Salesforce® and ADP®. Having an all-inclusive BI is a huge time-saver when you consider the tremendous amount of work required by the alternative—determining every table and field in Epicor ERP to connect and dashboards to create. Available content packs:

- Sales and CRM (sales orders, quotes, CRM quote pipeline)
- Financials (AR/AP, general ledger, templates for financial statements)
- Materials Management (inventory, purchasing, and shipping)
- Production (production reporting and quality)
- Preventive Maintenance (production equipment service)
- Field Service (customer equipment service)

Sales and Customer Relationship Management (CRM)

Quickly discover business trends by seeing more detail. Get deeper insight into sales results by account, location, geography, order, etc.

EDA answers these questions about your sales and CRM data:

- What is my average sales and gross margin by invoice?
- Who was buying and is not buying now?
- Where are we succeeding geographically

Gain full visibility into:

- Net sales
- Quantity shipped
- Quantity ordered
- Material cost
- Fixed burden
- Variable burden
- Labor cost
- Other cost
- Gross margin
- CRM quote pipeline

Key Features

Built for manufacturers

Offers fast implementation

Fast, flexible, and easy to learn

Based on next-generation analytics

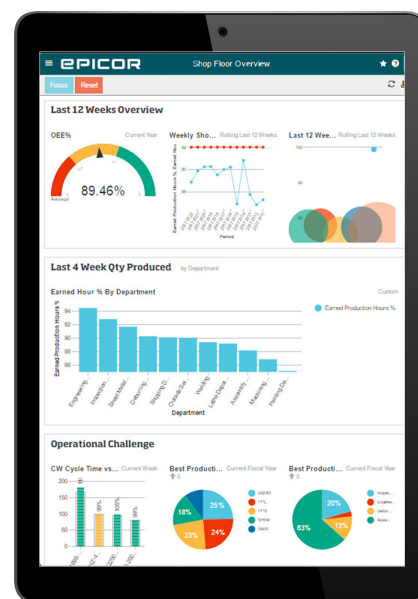
Integrated with Epicor ERP plus other data sources of your choosing

Keeps you connected with mobile access

Delivered as a complete, scalable cloud service—no hardware necessary

Does not require Epicor ERP licenses for your users to login to EDA

Public Internal Dashboards feature provides a live display link



Dashboard on a tablet

Materials Management

Improve the productivity of what is often your largest fixed asset—your inventory—by making sure you invest in the right inventory mix. Maximize the effectiveness your purchase spending and assess how your vendors are performing. Gain visibility and track the progress of shipments, including slicing and dicing bill of lading counts by serial number, customer, supplier, plant, and more.

EDA answers these questions about your materials data:

- What is our current inventory value today?
- What are our potential inventory shortfalls?
- What is on order on my open POs?
- Where are my shipments?
- Where were the serial numbers with quality issues shipped?

Gain full visibility into:

- Quantity on-hand
- Inventory value
- Cost
- Allocated
- Backordered
- On PO
- In-transit
- Reserved
- Quantity ordered
- Value ordered
- Quantity received
- Value received
- Quantity open
- Value open
- Ship quantity
- Shipped on time
- Bill of lading information
- Serial number shipments
- Monthly inventory and sales snapshots

Financials

Better manage your cash flow with new insights. Understand what receivables have arrived and what payables are coming due. Gain a more holistic view of customer pay cycles and make the most of vendor payment terms. Know what payment discounts have been received over a select time period to take targeted action. Improve management's overall visibility into the business with drill-down capability into categorized accounts and transactions inside your income statement and balance sheet. A financial statements database is also included with templates to get you started creating such statements as P&L, Balance Sheet, Cash Flow, and Trial Balance.

EDA answers these questions about your finance data:

- What are this year's actuals versus last year's actuals by account?
- How long is money held up in AR?
- What payments are receivable and what invoices are due?
- Did we take advantage of discount terms and how much did we save?

Gain full visibility into:

- Amount
- Paid
- Terms taken
- Allowed
- Memo amount
- Bad debt amount
- Amount receivable
- Owing
- Invoiced
- Paid
- Memo
- Terms taken
- Transactions for income statement and balance sheet

Production

Make certain that quality products are produced for the right customer at the right time—for the right price and right profit margin.

EDA answers these questions about your production data:

- What are my resource earned hours?
- Do I have differences in production rates between shifts?
- How do I improve the overall effectiveness of my resources?
- What is the most frequent cause for product rejections?
- What are the current and long-term trends in Epicor ERP Project Management data?

Gain full visibility into:

- Good quantity
- Total quantity
- Good value
- Total value
- Estimated Setup hours
- Estimated production hours
- Actual production hours
- Actual production rework hours
- Actual setup hours
- Actual setup rework hours
- Production run standard
- Production labor rate
- Setup labor rate
- Production labor rate
- Setup labor rate
- Production burden rate
- Setup burden rate

- Actual labor cost
- Actual burden cost
- Rework labor cost
- Rework burden cost
- Project Management schedule
- Project Management milestones
- Project Management progress percent

Preventive Maintenance

Use the Equipment Maintenance data and dashboard in EDA to explore equipment maintenance information by supplier, jobs, plant, open requests, and closed requests. This data can help improve preventive maintenance service and the average response time for issues. Managers can then see where problem areas are holding up production.

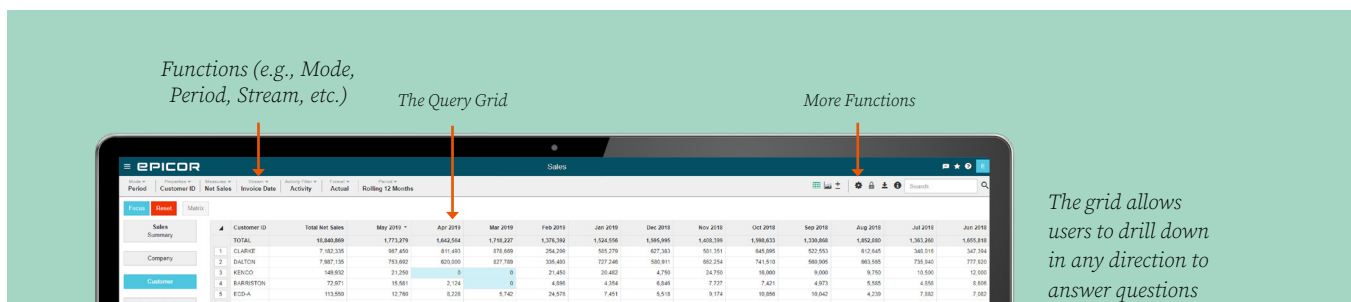
Field Service

Use the data and dashboard in EDA for the Epicor ERP Field Service module to see the customers, parts, service call type, and warranty eligibility included with each service call. These views then summarize totals, call counts per service representative, and other indicators. This content pack also includes service profit data and a dashboard that shows sales margins and total costs by customer. This dashboard helps managers determine the profitability of their service organizations.

Advanced MES (Epicor Mattec®) Content Pack

Advanced MES extends your Epicor system to provide Industry 4.0 Industrial Internet of Things (IIoT) functionality for automatic production and process monitoring. This solution empowers manufacturers with production data and helps you eliminate inaccurate and time-consuming manual data collection. Operators can stop measuring and monitoring, and instead focus on making quality products. You get the powerful metrics you need to improve performance—overall equipment effectiveness (OEE), run rates, scrap, yield, energy consumption, material consumption, and much more. Accurate machine-related data helps you pinpoint critical issues, reduce waste, and improve quality and customer service.

EDA includes a content pack for Advanced MES. If you are licensed for Advanced MES, you can blend both Epicor ERP and Advanced MES content into a common EDA dashboard and use it to determine, for example, the real cause of a late shipment—was it a production problem or a supplier problem?



EDA User Types

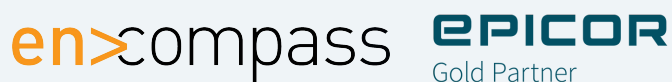
EDA User Function	Standard (Full) Named User	Viewer Named User
Analyze the data behind the charts	◆	
Create a dashboard or favorites	◆	
Export information from a favorite	◆	
Publish public internal dashboards	◆	
Share embedded dashboard views	◆	
Access dashboards shared with the user	◆	
Filter on information on that dashboard and cross-filter the dashboard to that information	◆	◆
Set a dashboard as the user's homepage	◆	◆
Access favorites that have been shared with the user	◆	◆
Sort the favorites by a column	◆	◆
Have favorites scheduled to be delivered via the email assigned to the viewer license	◆	◆
Have security restrictions applied to the user, which allows one dashboard for multiple user	◆	◆



Public Internal Dashboards production floor use example

Requirements

EDA and all EDA content packs for Epicor ERP are available for Epicor ERP versions 10.1.400 and higher, with the exception of the Project Management content (contained in the Production Management content pack) which is certified for 10.2.400 and higher. The lightweight SYNC application and one instance of data are stored on a local server with the majority residing in the cloud. Extra disk space is recommended that is 2.5 to 3 times the disk space of the data being loaded to the cloud. The only items required for subscription purchase are a starter pack of five standard (full) named users (plus additional standard (full) named users as desired). The Public Internal Dashboards feature requires a minimum of fifteen EDA standard (full) named users. All other necessary components, such as Epicor ERP content and the SYNC application, are included, as well as Advanced MES (Epicor Mattec) content.



Encompass Solutions is a business and software consulting firm that specializes in ERP systems, EDI, and Managed Services support for Manufacturers. Serving small and medium-sized businesses since 2001, Encompass has helped modernize operations and automate processes for hundreds of customers across the globe. Whether undertaking full-scale implementation, integration, and renovation of existing systems, Encompass provides a specialized approach to every client's needs. By identifying customer requirements and addressing them with the right solutions, we ensure our clients are equipped to match the pace of Industry.

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