Epicor Data Discovery

EPICOR

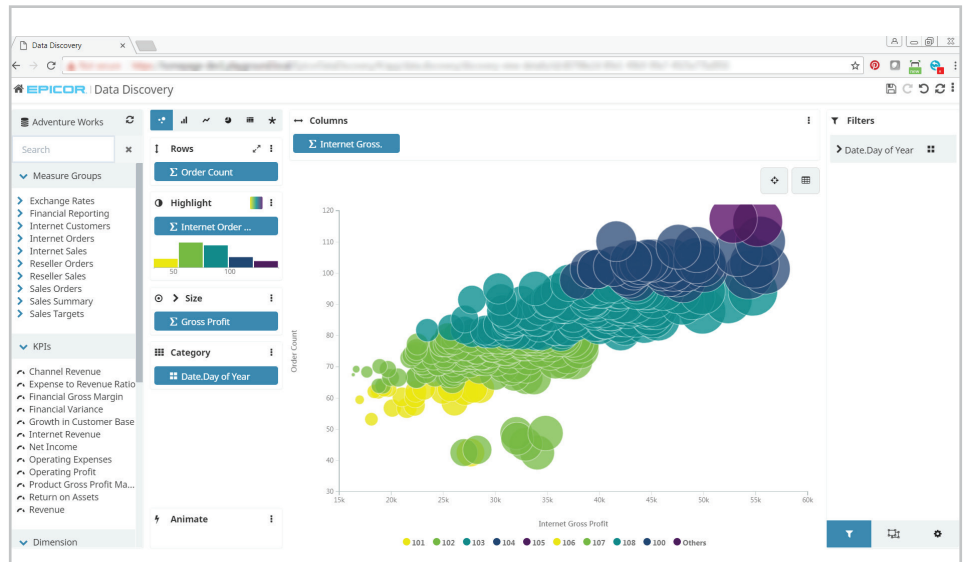## Product
▶ Epicor Data Discovery for Epicor® ERP

Benefits
▶ Become a data-driven company able to quickly make informed decisions

▶ Drive improvements based on data—not opinions

▶ Visually spot anomalies and drill down into transactional detail to find the source

▶ Use as a visual tool for data cleaning efforts

▶ Enable employees to access and tailor visualizations in a self-service capacity

Key Features
▶ Responsive data views

▶ Built for mobile

▶ Core and Basic included with Epicor ERP

▶ Real-time operational data

▶ BI Dashboard feature allows shared dimensions and cross-filtering between data views.

▶ Core includes 30 key metrics for financials, supply chain, manufacturing, and executives

▶ Drag-and-drop editing of visualizations

▶ Basic connects to custom BAQs

▶ Advanced connects to cubes built in Microsoft® SQL Server® Analysis Services

▶ View cards are embeddable and can be animated

▶ Microsoft Single Sign-On for Active Directory and Azure® Active Directory

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 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. 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 data warehouse.
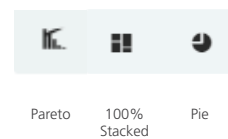

Drag and drop measures and dimensions in the Data Discovery View to gain new insights.
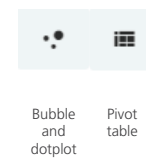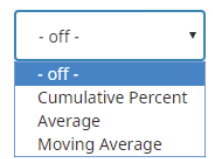

Compare — Line series, Grouped bar, Stacked bar

Percent of total — Pareto, 100% Stacked bar, Pie

Correlate — Bubble and dotplot, Pivot table

Trendline — - off -, Cumulative Percent, Average, Moving Average

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.

EDD Core

A full assortment of 30 metrics across four role types are included with EDD Core. 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

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

EDD Basic

EDD Basic allows customers who create their own BAQs to attach them to EDD and create visualizations. Upgrading Epicor ERP customers can reuse their custom BAQs in EDD.

EDD Card Views 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, and other widgets that can be easily rearranged and resized on the 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.

EDD Advanced

EDD Advanced allows customers to connect EDD to outside data sources—data sources other than Epicor ERP BAQs and External BAQs—most notably, to multidimensional cubes they have created in Microsoft SQL Server Analysis Services. This allows the EDD BI Dashboard feature 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

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
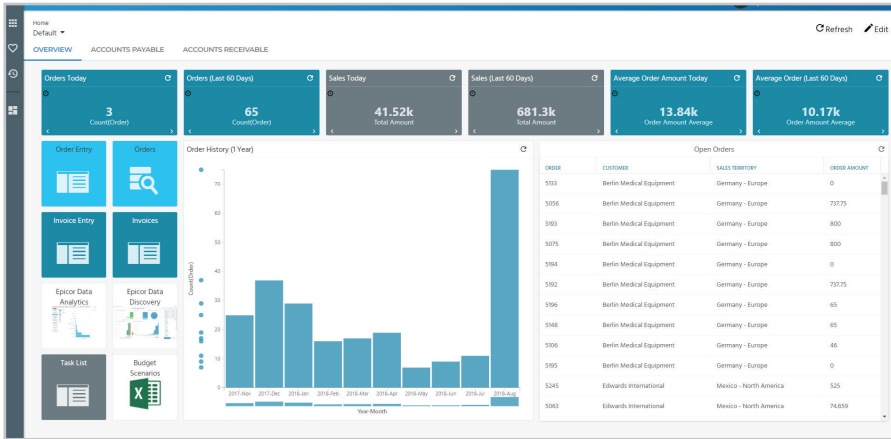
Answer: EDD outstanding receivables metric

"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."
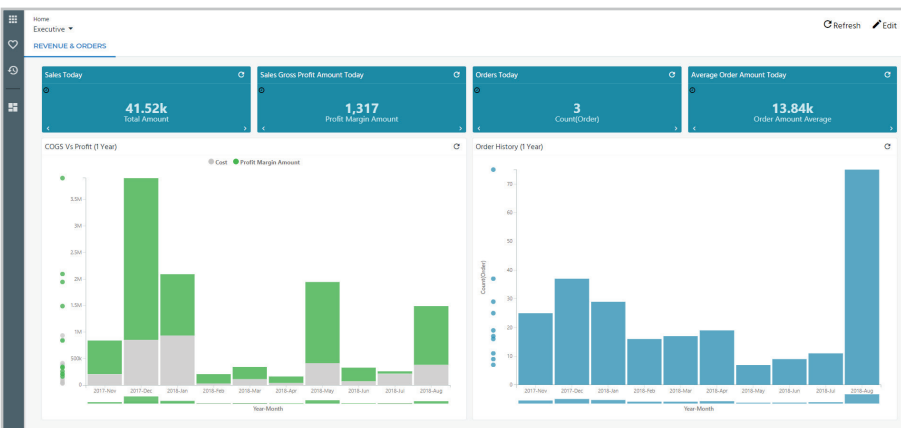
—Sales Manager

Answer: EDD quote win/ loss analysis metric

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

The animation capabilities of EDD are used to full advantage in Active Home Page.

Requirements

EDD Core and Basic are 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.

Directory with data-level security set by role. Epicor ERP users can still log in to EDD via Epicor ERP login.

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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