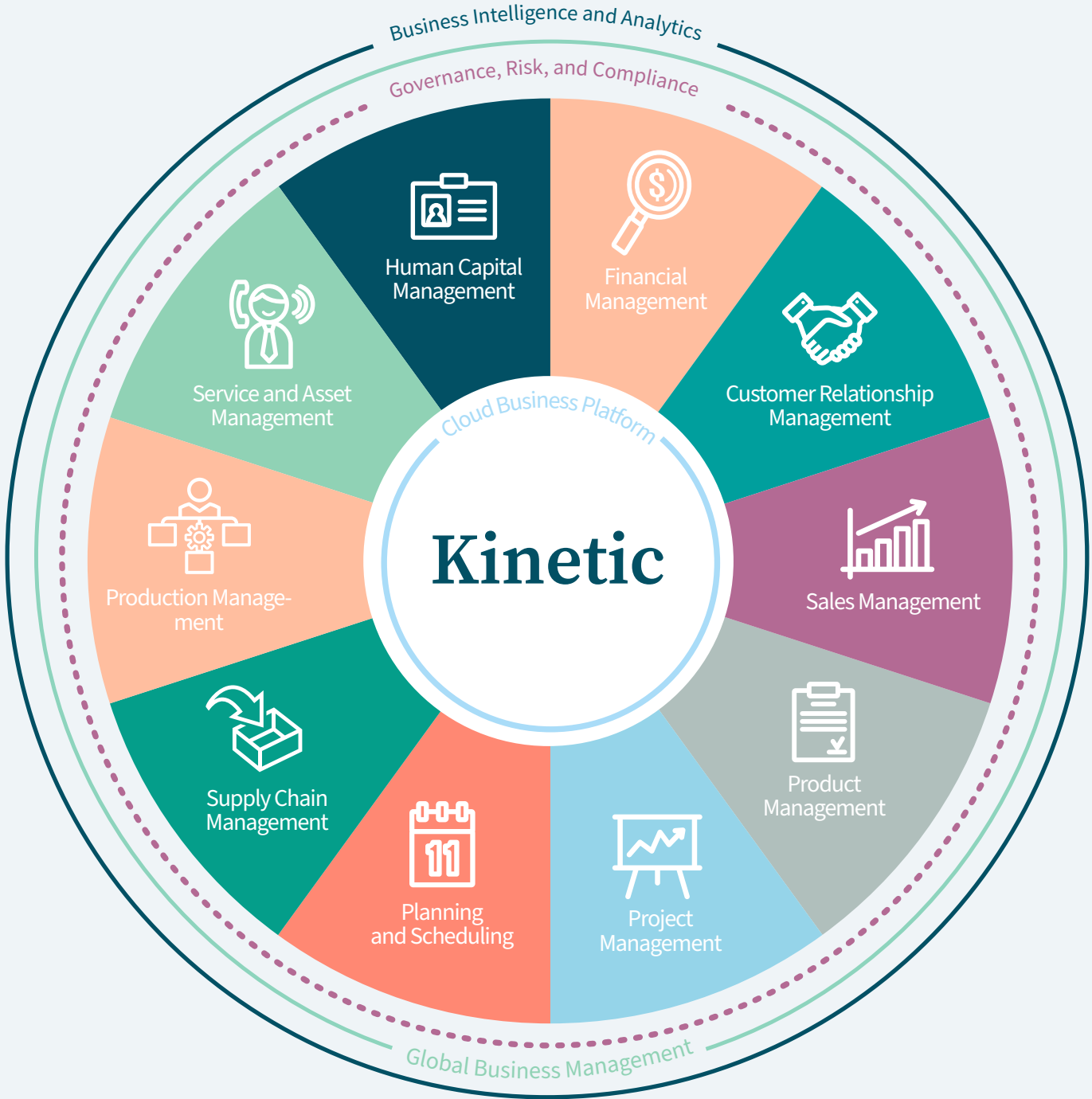


EPICOR

Business Intelligence and Analytics







Human Capital Management

- Core HR
- Global HR
- Candidate Self-Service
- Employee Self-Service
- Talent Management
- Training and Development
- Position Control
- Timesheets



Service and Asset Management

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



Production Management

- Job Management
- Advanced Production
- Kanban Lean
- Data Collection
- Advanced MES
- Quality Assurance
- Quality Management System



Supply Chain Management

- Purchase Management
- Supplier Relationship Management
- Supplier Portal
- Inventory Management
- Advanced Material Management
- Advanced Unit of Measure
- Shipping and Receiving
- Quick Ship
- Warehouse Management
- Supplier EDI and B2B Integration



Planning and Scheduling

- Forecasting
- Master Production Scheduling
- Smart Demand Planning
- Material Requirements Planning
- Scheduling and Resource Management
- Advanced Planning and Scheduling
- Infinite, Finite, and Constraint-Based Scheduling



Financial Management

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



Customer Relationship Management

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



Sales Management

- Estimate and Quote Management
- Order Management
- Sales Order Automation
- EDI/Demand Management-Point of Sale
- Commerce Connect
- Dealer Network Portal
- Configure Price Quote



Product Management

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



Project Management

- Project Planning and Analysis
- Project Generation
- Project Billing
- Resource Management
- Contract Management
- Planning Contract
- Time Management
- Expense Management
- Advanced Project Management



Governance, Risk, and Compliance

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



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
- Virtual Agent
- Collaborate
- Enterprise Search
- Epicor Learning
- Business Process Management
- Enterprise Content Management
- Business Workflow Automation
- IoT and IIoT Applications
- eCommerce Platform
- EDI and B2B Integration
- Electronic Reports Engine
- Application Studio Configuration
- REST Services and Epicor Functions
- Updatable Dashboards
- Epicor Integration Cloud
- Deployment Flexibility
- Microsoft Azure Cloud
- Security Management



Global Business Management

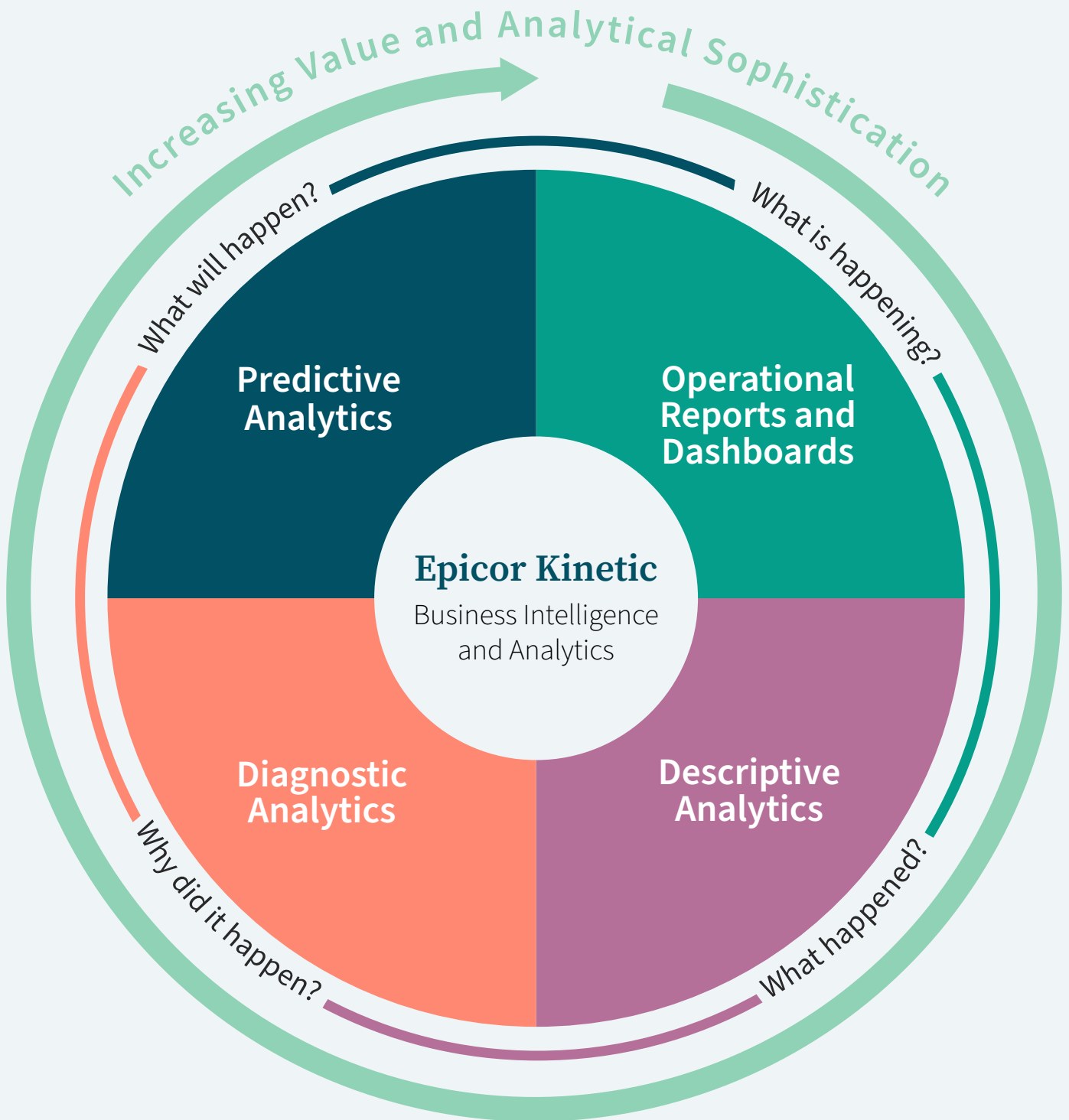
- Multicompany Management
- Multicurrency Management
- Global Multisite Management
- Multilingual Data Management
- Master Data Management
- Scalable, Distributed Deployment
- Global Engines

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- Operational Reports/
Dashboards
- Descriptive Analytics (Business
and Financial User Reporting/
Dashboards)
- Diagnostic Analytics
(Scorecards/KPIs, Financial
Planning)
- Predictive Analytics
(Forecasting)

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.



*Included with Epicor Kinetic core packages

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

Operational Reports and Dashboards

- ◆ Advanced MES
- ◆ Epicor IoT
- ● ◆ Trackers*
- ● ◆ Status Dashboards*
- ● ◆ Business Activity Queries (BAQs)*
- ● ◆ Microsoft SQL Server Reporting Services (SSRS)

Diagnostic Analytics

- ◆ Epicor Data Analytics (EDA)
 - Includes Advanced MES Analytics*
- ● ◆ Epicor Financial Planner (EFP)

Descriptive Analytics

- ● ◆ Spreadsheet Server
- ● ◆ Data Discovery (Standard)*
 - Data Discovery IoT Visualization*
- ● ◆ Executive Dashboard*

Deployment Choices

- Cloud
- On premises

Data Sources

- ◆ Kinetic production data
- ◆ Data mart
- ◆ Data warehouse

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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 Kinetic system. It all starts with Business Activity Queries—SQL queries throughout the Kinetic system made with a visual drag-and-drop wizard. The dashboards provided with 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:

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

Business Activity Queries

Every business needs an intuitive and easy- to-use query engine, which is why Epicor created Business Activity Query (BAQ) in the core platform of the Kinetic 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 or view results in a BAQ grid or Data Discovery view, and much more.

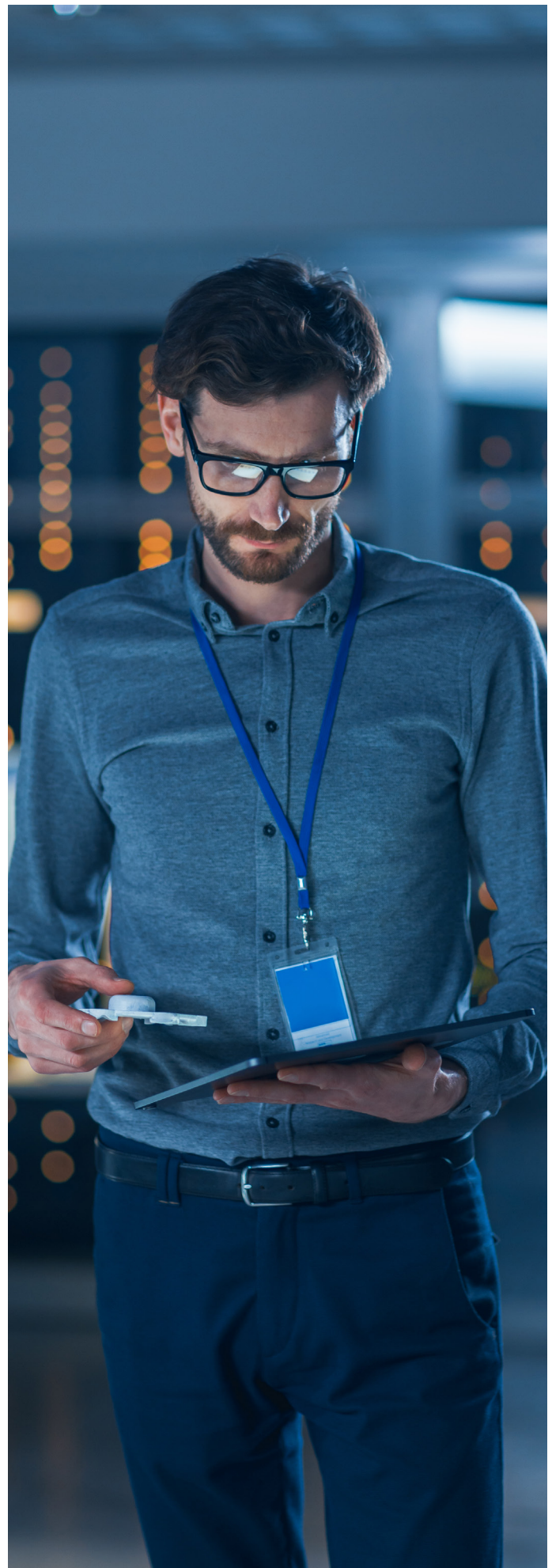
Complete functionality includes:

- 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 Kinetic 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 Kinetic 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.

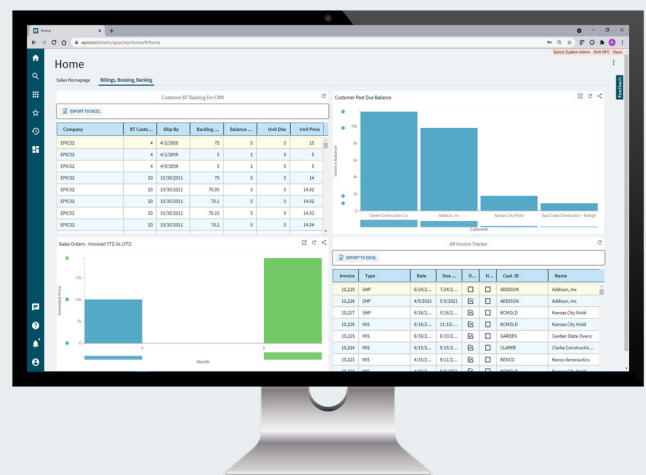


Trackers and Dashboards

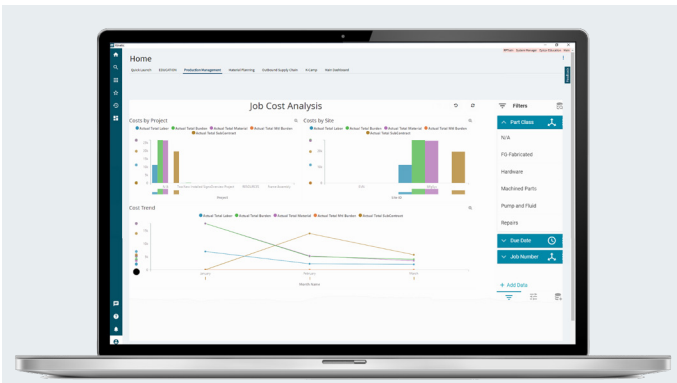
The Kinetic Home Page permits the combination of multiple widgets for data views, dashboards, and BAQ grids that provide capabilities like inquiries, ad hoc reports, graphical analyses, tactical business intelligence, alerts, and business monitoring. The Kinetic Home Page provides a robust, one-stop 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—Drag and drop measures and dimensions in the real-time Data Discovery view for new insights.

Data Discovery IoT Widgets

Epicor IoT is an 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.



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.

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:

- EDA Financials
- 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.*





EPICOR

We're here for the hard-working businesses that keep the world turning. They're the companies who make, deliver, and sell the things we all need. They trust Epicor to help them do business better. Their industries are our industries, and we understand them better than anyone. By working hand-in-hand with our customers, we get to know their business almost as well as they do. Our innovative solution sets are carefully curated to fit their needs, and built to respond flexibly to their fast-changing reality. We accelerate every customer's ambitions, whether to grow and transform, or simply become more productive and effective. That's what makes us the essential partners for the world's most essential businesses.

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