



Epicor

Performance Management

Inspiring better business insight with in-context and
real-time enterprise performance management.



Performance Management

Epicor Enterprise Performance Management is an end-to-end solution that removes the barriers to better business insight through a combination of intuitive user experiences, user driven key performance indicators (KPI), and pre-packaged analytics that have real meaning to the business. Epicor EPM leverages the advanced analytic capabilities of the Microsoft platform and incorporates modern web application concepts for unprecedented ease of use and ultimately business results.

Microsoft SQL Server Reporting Services (SSRS) underpins the Epicor EPM offering and provides a flexible reporting structure for delivery professional reports and analysis to business stakeholders in a format that business users can easily consume. 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® is an invaluable tool for improved analysis and decision making in the enterprise.



- ▶ Planning and Forecasting
- ▶ Operational Data Store and Data Warehousing
- ▶ Scorecards and KPIs
- ▶ Role Based Content
- ▶ Trackers and Dashboards
- ▶ Mobile Business Intelligence

Trackers and Dashboards

Built directly into all Epicor applications, Epicor Dashboards permit the combination of multiple capabilities such as inquiries, ad hoc reports, workbenches, graphical analyses, tactical business intelligence, alerts and business monitoring—all in a single dashboard. They provide 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. In addition, they put the visual indicators and functions you use the most right at your fingertips. Toolled with unique flexibility, Dashboards enable users to develop their own workbenches using a series of online views of information such as a tracker. From a tracker, “open with” technology is deployed to drill into any part of the system, whether it is to enter a new order, modify an existing one, or update a customer record.



Closely manage customer and supplier performance with comprehensive role-based and interactive Dashboards that offer a complete picture.

The power of Epicor Dashboards is in how they enable users to specify how they work and tailor their workspace to fit their needs. The power of the Dashboard is in its ability to act much like the instrument cluster of your car. The Dashboard is used to provide real-time exception-driven indicator flags which alert you to possible problems in your business. From these business activity indicators, you will be able to easily drill down to appropriate parts of the system to see more information. Through integration with the Internet, Dashboards can merge Epicor application and external data as one to help drive your

daily activities. From monitoring your employee intranet site to live access to industry-related Web sites, each Dashboard contains the information you and your employees need to more proactively run your business.

Role-Based Home Page

Optionally replacing traditional menu systems, the Dashboard is quick and easy-to-use. In fact, you can use the Dashboard as your default view to your daily workflow. By integrating access to all of your favorite functions, third-party applications such as Microsoft Word and Excel, and online help topics, the Dashboard puts tremendous power in the hands of users and makes your Epicor solution one of the easiest applications to use.

Exception-Driven Philosophy

Manage exceptions with standard components designed to offer users the ability to review the exceptions happening in the business and manage them rather than run queries, print reports and talk to coworkers to find the exceptions. The Dashboard puts the exceptions front and center for better control over your entire business.

Real-Time Access To Up-to-Date Information

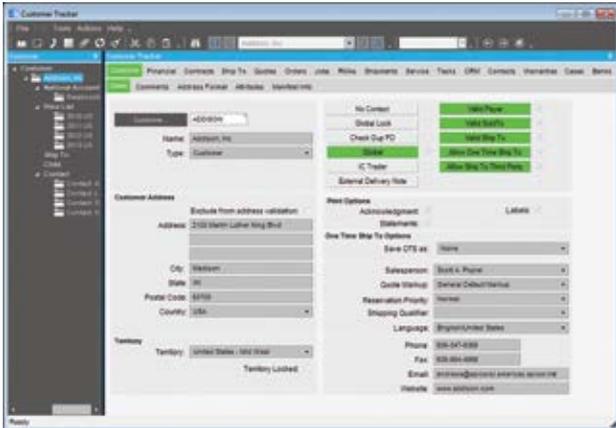
Get real-time updates for the latest information available. The user defines the refresh rate for each component that resides on the Dashboard.

Workbenches

Generate user-specific or function-specific workbenches that drill into detailed information, offer tailored exception management, and allow users to efficiently manage information in the system.

Trackers

Enable users to drill into the finer details of the system. Whether looking for related job or quote information or the status of shipments, receipts or financial transactions, trackers are vehicles for drilling and moving throughout the system. The Dashboard enables businesses to generate their own views of information.



Easily create and configure your own trackers to ensure real-time and in-context access to your most essential information.

Personalized Components

Select from standard indicators that can be used throughout your business. These components are enabled at the user level and allow you to inquire into common elements like open quotes, expiring quotes, new orders, late jobs, and unbilled shipments.

Custom Components

Quickly generate your own indicators using our intuitive business activity query (BAQ) wizard and Dashboard maintenance. This allows you to see the exceptions in your business based on your unique needs. Create detailed or summarized indicators that are focused on a particular record such as a customer. See related information by linking multiple components together and publishing based on the selected record. Advanced components can be generated while adding sheets or additional tabs to existing components.

Personalized to Fit the Needs of Users

Each user personalizes their own Dashboard by selecting the components that show up in their unique environment. The user selects not only which components to use, but the size and placement of the components in the scrollable Web page environment offered by the Dashboard.

Open to Related Functionality

Quickly navigate to other areas in the system. Right-clicking on any record in the component moves you to other areas of the system related to that record and optionally gives the user the ability to modify or add records to the system.

Web Interface

Find information more efficiently and process business requests via the Web. Fully secured Web access promotes employee use of the Web-based on your business needs.

Web Deployable

Generate and deploy components via active server pages (ASP).

Predefined Dashboards

Epicor is delivered with predefined Dashboards covering all the most common business roles (e.g., salesperson, buyer, engineers) and contexts (e.g., sales order, quote, job, invoice, etc.) that exist within the product.

Dashboard Style Sheets

Enhance consistent styles for dashboard across the enterprise, company, or within a department.

Dashboard Charting

With over 40 chart types available, visual display of dashboard information is easy and readily available to users.

Executive Dashboards

The Executive Dashboard comes with a series of graphical components designed to give managers the strategic data required to make critical short- and long-term decisions. Strategic use of these components allows you to manage your shop by exception, as opposed to micromanaging the increasing number of variables and demands being placed on your company. Components included in the Executive Dashboard include Plant Performance, Supplier Performance, Order Backlog, Scheduled Shipments, Shipping Performance, and Cash Flow.

Dashboard Assemblies

Build Dashboards into assemblies and deploy them to the server in a few clicks, as well as automatically adding them to your favorites in the menu and as a tab in the menu area. Assemblies are also available to the Epicor Everywhere™ Framework, so that Dashboards may also be generated as Web forms from XML metadata.

Self Contained Dashboards

Package and securely deploy Dashboards as self-contained forms without the need for other Epicor applications.

Advanced Financial Reporting

Epicor Advanced Financial Reporting (AFR) allows the creation and distribution of professional financial reports to company stakeholders. It allows the management and viewing of financial data in a user friendly and easy-to-use environment. Financial reports are different from other reports because each line has to be defined in terms of account ranges or sets for which a certain total needs to be calculated, versus other types of reports which do not require definitions of such complex groups. AFR simplifies report creation by exposing an intuitive interface which speaks to the user in familiar financial terms.

AFR creates reports using the elements familiar to an accountant or financial professional. These include spreadsheet terms such as rows and columns. It also provides an additional element of reporting hierarchy or trees allowing the viewer to generate the report for the area of the business which is their responsibility. Because the reports are parameter driven, the viewer can generate the report at any time by selecting the parameters of time, company, book or organizational element as required without the need for intervention by the financial team.



Manage, report, and distribute financial information securely.

Budgeting, Planning, and Forecasting

For those companies that need advanced analytics such as budgeting and planning or advanced forecasting, Epicor offers EPM Canvas Planning Server. This platform is extremely flexible and scalable and can easily handle very large implementations across multiple installations, as well as managing mixed content from multiple sources.

Many organizations need to have more control over their budget process or want to be able to test various business scenarios before they are actually deployed internally. At the same time, they also want to have an easy and flexible environment that most people are familiar with to reduce education. EPM Canvas Planning uses Microsoft Excel, Microsoft SQL Server, Microsoft SQL Server Analysis Services and EPM Performance Canvas Server to create a very powerful platform for advanced and collaborative Budget, Planning and Forecasting—even for very large organizations.

EPM Canvas Planning

EPM Canvas Planning is a completely unified performance management solution that allows organizations to drive execution and more effectively monitor performance through integrated monitoring, analytics, and planning capabilities. It provides all of the functionality that is needed for performance management including scorecards, dashboards, management reporting, analytics, planning, budgeting, forecasting, and consolidation.

The application reaches all employees, across all business functions (finance, operations, marketing, sales, and human resources). It enables any business, regardless of size, to operate like the world's top performers. By accurate, simple and quick measurement and management of financial and operational Performance it creates unique advantages.

A Single Version of the Truth

Decisions made from a clear common perception of business gives any company a competitive advantage. The unique unified architecture of Performance Canvas ensures that all data is consistently stored in the Microsoft-based database

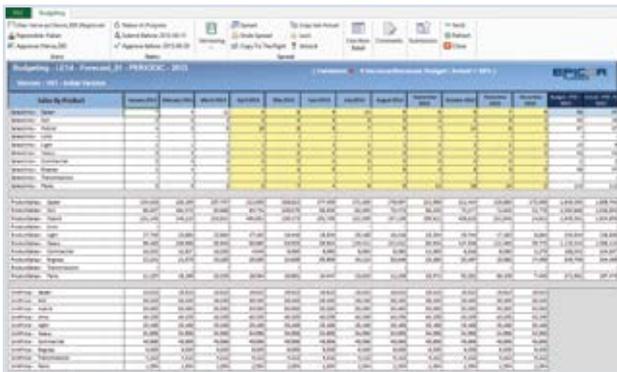
infrastructure independent regardless if it is used for financial reporting, operational control or budgeting/ planning.

Canvas Planning is a Microsoft SQL Server-based financial intelligence package including budgeting, planning, etc.

- ▶ Budgeting
- ▶ Planning
- ▶ Forecasting
- ▶ Consolidation
- ▶ Intercompany eliminations
- ▶ Reporting
- ▶ Analysis

Financial Planner

Epicor Financial Planner is a comprehensive budgeting, forecasting, and planning tool that empowers and simplifies the entire ongoing process for organizations. Comprising a full Microsoft Excel front end it takes the parts of the budgeting process that people are used to without having to learn a new toolset and extending on this with functions such as spreading and pulling in actual ERP data. This intuitive interface sits on top of a secure SQL database that holds all of the budgeting information as well as controlling the defined workflow process for the business and security levels allocated to the budget users.



Easily manage budgeting and planning with EPM Canvas Planning Financial Planner.

Canvas Planning Business Modeler

Models that exactly match and support the structure of your business are created using the EPM Canvas Planning

Business Modeler. The Modeler manages Workflow, ETL, and administrator functions such as role-based security as well as having the powerful capabilities of advanced business modeling.

Business users can design models the way they think about their business, incorporating standard financial functionality. Capabilities range from single model deployments to enterprise scenarios. Using the Canvas Planning Business modeler it's easy to do advanced multi-model planning and reporting applications without writing code.

Using Script Logic, advanced tasks are incorporated into the models such as:

- ▶ MDX Formulas
- ▶ Foreign currency conversion
- ▶ Customized logic for specialized business processes
- ▶ Inter-model logic

Utilizing the high performance Analysis Services in Microsoft SQL Server, the Modeler has a built-in builder/ optimizer that creates and maintains dimensions, attributes, cubes and alternate hierarchies.

Financial Intelligence Included

Financial intelligence is a range of functions including currency conversion, allocations, intercompany eliminations, and numbers across time reporting(periodic, year-to-date, quarter-to-date, and others). Canvas Planning allows each business rule or formula to be customized to support your specific needs and financial data.

Where can Canvas Planning be used?

Canvas Planning can be used for a wide range of applications such as financial, human resource, supply chain, capital planning, sales, profitability, and many others.

Why Unified?

Most Performance Management products in the market are collections of products (integrated, not unified), each designed from the focus on a single function such as reporting, consolidation or planning. Since these functions tend to overlap in the context of business, it makes sense to have them in a unified system. The advantages are significant cost savings, fast implementation, high data integrity and high data utility.

Coding Not Needed

Users can build, share and manage their budgeting and forecasting applications without the need for coding.

Web-based Analytics

As a fully integrated part of the Performance Canvas family, creating Dashboards, Mashboards and Scorecards for both Web, Microsoft SharePoint and Mobile environments is done quickly and easily. Any Dashboard, Mashboard or Scorecard may also include data entry possibilities to planning and what-if Web-based solutions.

Guided and Contextual Analysis and Planning

Guided and contextual analysis can be gained through the tight integration between Planning, KPIs and Analytics within the same Performance Dashboards.

Slice and Dice

Analytics span from multidimensional slice and dice to rich functionality like drill-across, drill-to-detail, pivoting, root-cause analysis, and prediction.

Top-Down and Bottom-Up Planning

Top-down and bottom-up planning functionality connects people and drives accountability. Dynamic and standard reports include financial and business performance reports.

Process Management

Process management features enable business users to manage forms, workflows, submissions, approvals and reports.

Multiple Currency Conversions

Management and GAAP consolidation processes are supported with multiple currency conversions, intercompany eliminations and reconciliations, and multi-tier allocations.

Operational Data Store and Data Warehousing

Your Epicor next-generation enterprise applications offer far reaching business functionality that spans literally hundreds of business processes, backed by an ever growing transactional database of information. Business performance is based not just on how these applications help run day to day processes but by how they support greater business insight—from historical reporting to advanced analysis. At the same time, although your Epicor applications are optimized for transaction processing, ad hoc inquiries and scheduling, a more advanced solution is required for when reporting and inquiry volumes increase and for longer term performance analysis.

In order to manage this need, Epicor EPM offers a comprehensive set of tools that take online transaction processing (OLTP) source data from your Epicor applications and turn it into actionable analytics.

Epicor Replication Server

Epicor Replication efficiently replicates all database transactions from one or more production companies and application server to a single or multiple separate ODS environments. Replication Server is designed to offload processing from the main application server in support of enterprise performance management requirements and supports offline reporting, offline access to archived as well as live data, offline ad hoc queries (including those from Information Worker), offload of external system processing cloud based services, aggregated database holding records from multiple companies across multiple servers, and data transfer for additional business intelligence. Through Replication Server, your business holds the keys to a massively scalable environment that grows as your business does through effective load balancing of essential business processes.

Epicor EPM Server

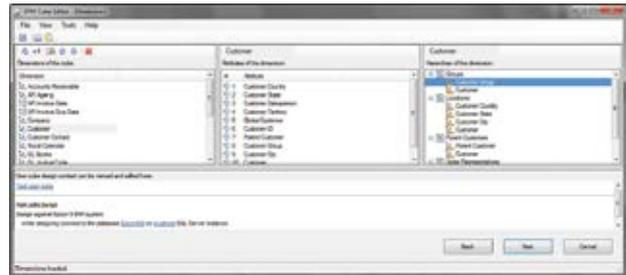
Epicor EPM Server offers a comprehensive business platform for advanced data warehousing in support of packaged analyses like on-line analytical processing (OLAP) cubes, key performance indicators (KPIs), and Scorecards. Epicor EPM Server is comprised of four main applications for the end-to-end management of business insight: Epicor Cube Deployment, which manages the complete deployment process of OLAP cubes against your Epicor system; Epicor Cube Management, which monitors and handles the management of OLAP cubes, such as licensing and security or whether the cubes have been processed correctly; and Epicor Cube Customization, where users can edit and tailor OLAP cubes to include their own KPIs or measures.



Epicor Operational Data Store

Epicor EPM Server enables the creation of a total enterprise data warehousing environment, beginning with the Epicor Operational Data Store (ODS), a staging area where data may be consolidated, cleansed and stored from multiple Epicor and external systems. The ODS data can be created and refreshed in near-real-time from disparate OLTP sources using Epicor Replication Server. Epicor ODS databases provide read only access for operational reporting, inquiries such as trackers, and provides data consolidation and cleansing operations to

prepare data for use within the Epicor data warehouse. Epicor ODS provides a permanent record store for historical data and relieves the impact on OLTP system performance from heavy reporting and ad hoc inquiries. Furthermore, the ODS acts as the sole source of data for the Epicor data warehouse, removing traditional complexity.



Designing OLAP cubes against ERP systems can be a complex task, but not with Epicor Cube Connect, which transfers control of cube design to end users and makes the process far simpler with an easy to use wizard and a built in Business Glossary.

Epicor Data Warehouse and OLAP Cubes

The Epicor data warehouse consists of a set of standard pre-defined data marts created within Microsoft SQL Server and OLAP Cubes created within SQL Server Analysis Services (SSAS), which provide the core data foundation for Epicor EPM applications. Each business process enabled for analysis has one or more user cubes, a data mart/OLAP cube combination which is created, customized, deployed, and managed by the Epicor EPM Server. While it is not possible to provide a single static data warehouse which meets all of the analytical needs of Epicor customers, the standard user cubes follow a set of warehouse design guidelines to promote performance and analytic data consistency across the enterprise. The use of conformed dimensions and other star-schema design best practices is employed to meet these goals.

Epicor Cube Connect

Epicor databases often store millions of business transactions. This huge amount of business data can provide valuable insights into your business and give you information that is immediately actionable—if you know how to get to it.

OLAP is the preferred way of extracting meaningful information from large datasets, because it provides intuitive analysis and makes it easier to find trends, patterns, ratios, and quantities in transactional data. OLAP is built on multidimensional data structures called cubes, which traditionally need to be custom designed for each set of transaction data. In addition, designing a cube is not a trivial task: it requires considerable knowledge of the structure of the source database. Once the cube has been created, there is no easy way to deploy it to other Epicor installations.

Epicor Cube Connect offers a unique approach to the problem of cube design and deployment. By the use of an extended data dictionary, which means that you work with a normal business language, it creates OLAP cubes for you based on the end results you hope to achieve. In other words, from the KPI down, instead of from the data warehouse up. It also contains easy to use tools for scheduling of updates and deployment of results.

This makes cube design simpler and removes the need for specialist knowledge of the underlying Epicor database structure or data warehousing techniques. Once created, cubes can be deployed immediately, or they can be saved to file for later use.

Cube Connect Management Console

Administration, scheduling and deployment of OLAP cubes is carried out via an easy to use management tool that uses Microsoft Management Console Snap-In technology, which makes it easy to run administration from any client.

Epicor EPM Canvas Deployment

Automatically create EPM Canvases from Epicor Cube Connect OLAP cubes including the Gems and Slicers used to create that Canvas.

OLAP Consumers

A set of standard OLAP consumers is defined within EPM Server to provide a common toolset for defining all analytic data views. Core consumers include Epicor EPM Canvas, Microsoft SharePoint, Microsoft Office Excel for simplistic ad hoc analysis and data mining, Epicor ICE business architecture for OLAP

integration into Epicor next-generation enterprise applications, and SSRS for standard print reporting.

Content Packs

Packaged Analysis

Epicor offers a comprehensive analysis platform. Powerful and yet flexible, the Epicor analysis environment is designed to fit organizations of different sizes and in differing industries. Offering end-to-end performance analysis, Epicor delivers EPM Canvas, SharePoint Web Parts, Executive Dashboards, Excel and SSRS for ad hoc reporting.

Epicor EPM Content Packs provide the quickest and easiest way to get up and running with advanced analytics from your Epicor system. It consists of pre-packaged OLAP cubes supporting over 250 predefined KPIs that industry leaders use to measure enterprise performance. All content packs can be deployed against a single company or against multiple companies for cross-company analysis of trends and performance.

Sales Management

The Sales Management EPM Content Pack allows you to perform trend analysis and monitoring of the entire Sales Pipeline. The pack includes Campaign Pipeline Analysis and Sales Quota Performance, suitable for frequent operational performance monitoring as well as detailed trend analysis views of Quotes, Orders, and Sales by Territory, Plant, Customer, Campaign/Event, Salesperson, Part and more.

Production Management

The Production Management EPM Content Pack allows you to perform trend analysis and monitoring of production management business processes. The pack includes Quality Analysis, Plant Performance, and Open Job Analysis suitable for frequent operational performance monitoring as well as detailed trend analysis views of RMA, Non-Conformance, DMR, Projects, Jobs, Materials, and Manufacturing Lead Time by Plant, Warehouse, Customer, Campaign/Event, Salesperson, Work Center, Part and many more.

Material Management

The Material Management EPM Content Pack allows you to perform analysis and monitoring of material management business processes including purchasing, shipping, and inventory control. The pack includes Inventory On-Hand Analysis, Customer and Supplier Shipping Performance, and Inventory Turn suitable for frequent operational performance monitoring as well as detailed trend analysis views of Inventory Transactions by Buyer and Approver, Job and Assembly, Part, Plant, Warehouse and many more.

Financial Management

The Financial Management EPM Content Pack allows you to perform trend analysis and monitoring of key financial information. The pack includes Open Accounts Payable, Open Accounts Receivable, and Cash flow Analysis suitable for operational performance monitoring as well as detailed historical analysis views of AP, AR, GL, and Cash flow information by Currency, Customer, Chart of Accounts, Control Code/Type, GL Code, Job and Assembly, Project, and many more.

Scorecards and KPIs

Individual KPIs and combinations thereof, typically known as Scorecards, bring together high level visualization of business processes and business events, so that you can monitor your organization and carry out benchmarking or performance based management. Epicor EPM delivers this level of business insight via a solid and highly productive foundation to make it easier than ever to raise business performance to the highest level.

Epicor EPM Canvas

Many of the existing tools available today for KPI and Scorecard creation require data warehousing and business experts to combine for often lengthy project development. Even then, many scorecards remain static in terms of what they are measuring, and are not normally designed to handle ad hoc analysis, which is simply a competitive pre-requisite.

Epicor EPM Canvas is a new breed of native Web application designed with user self-service in mind, and for enabling agile response to new and changing business problems and

opportunities. It does not demand the deep knowledge of a business intelligence (BI) professional, instead it is designed for business users without any particular BI knowledge, and uses only business terminology. Merging the two disciplines of performance management and business intelligence, Epicor EPM Canvas not only monitors but aligns and measures an organization against set goals.

Designed for All Knowledge Workers

With little or no training required, ordinary business people can monitor the status of complex business processes, graphically display performance, alert other users to issues or exceptions, and simply click on graphics to analyze them further by drilling into details. By illuminating business strategy, Epicor EPM Canvas empowers knowledge workers to put the focus on what's really important and shows how each contribution counts.

Scorecards

Epicor EPM Canvas is used to create informative Scorecards—a combination of KPIs—with various chart graphics types that include 3D pie and spider charts.



Assemble comprehensive scorecards for balanced enterprise-wide performance management and measurement.

Multiple Scorecards

Epicor EPM Canvas can be used to create both strategic, tactical, and operational Multilevel scorecards thereby enabling precision and detail in communication while resolving business issues or identifying business opportunities, thereby increasing the performance of the organization.

Gems and Slicers

A Gem is a defined term within your business. A Slicer is a tool which you use to select the information you will see in the Gems displayed on the EPM Canvas. The slicer provides a visual representation of the business term. Gems are designed to be easily usable and instantly meaningful to users throughout your organization. By dragging one or more Gems onto your Canvas you decide the business focus. When you drag a Gem onto your Canvas it uses the Slicer to instantly display a table or graph representing a perfect visualization of your business term. A Gem may contain its own preferences on what information to see, but in many cases you may need to change those preferences to fit your business terms. As you design your Gems, Slicers are also used to connect the selection criteria.

Multiple Canvases

Epicor EPM supports multiple types of canvases for different purposes like Microsoft SharePoint, Mobile, and others.

Microsoft SharePoint Canvas

Epicor EPM Canvas provides a Microsoft SharePoint connector to enhance the power of Epicor EPM Canvas scorecards and dashboards by making them available in Microsoft SharePoint, a powerful tool for creating intranet, extranet and Internet Portals.

Search Canvas

Epicor EPM Canvas may also be deployed as interactive and searchable Web experiences. With support for full text indexing and searching data can be configured to be used by almost any search engine like Microsoft Enterprise Search and Google OneBox™.

Mobile Business Intelligence

All KPIs created by Epicor EPM and deployed within Canvases can also be deployed to mobile devices for wireless access on the go.

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