

# An Introduction to Compass Analytics

In today's module we will be discussing the Compass Analytics Application and how the successful integration of this product can have a positive and immediate impact on your business.

Now without proper analytics or business intelligence you do not have true insight into what is occurring in your business... you are operating in darkness. With Compass Analytics we are able to turn on the lights and create custom reporting that will impact and guide your business forward.

So this session is going to start with the basics. We will answer the question "What is Compass Analytics", then show you how to access and navigate within the application, and finally we will discuss different ways to approach the application to unlock the power of this Analytics tool.

## Topics

- What is Compass Analytics
- Access & Navigation
- The Power of Compass Analytics

## What is Compass Analytics

Every day, you face the pressure of making decisions affecting the direction and progress of your company. At the heart of making a good business decision is gaining a clear understanding of where your business stands today and what lies ahead. It's not enough that you have an abundance of information—you need clear, understandable and reliable information at the right time to ensure that your decisions improve your business results.

Epicor Compass is a performance management tool designed to provide you with up-to-the minute insight into your business. With this powerful tool, you can customize analysis and reporting to suit your particular needs so you can make better and timelier decisions.

Compass Analytics harnesses the power of the data collected by your Eagle system.

When you need it, the Compass Analytics solution provides your business information to you in an intuitive manner so you can make confident decisions, both strategic and tactical, to continuously advance your business.

The Epicor Compass software unlocks and leverages the business and customer data on your

Epicor Eagle system by incorporating several advanced technology components including the

Eagle Operating System based on Linux, a MySQL relational database, XML, and Microsoft

.NET technology. The result? An intuitive user interface, quick and flexible deployment, with better system speed and performance. Whether you have a small or large business, multiple locations, or one, your business will benefit from the insight you gain from this powerful analytics tool.

## Access & Navigation

Once you have purchased Compass Analytics and it has been installed, you can access the program by either clicking on the desktop icon or by navigating to the Compass Menu through the Eagle Browser.

After launching the application you will be prompted to sign in. Compass uses the same security credentials as the Eagle Browser so simply enter your username and password to continue.

The Compass Analytics Application opens and you are ready to begin. The application navigates with a ribbon menu similar to those seen in Microsoft Office Products. Along the top you will find the Ribbon Menu broken down into four sections, Page, Insert, Tools, and Help.

Within each menu ribbon you will find actions that relate to the main selection. In this case we opened the Page menu and as you can see there are actions relating to Page Activities such as creating new pages, saving the current page, inserting new work areas within the page, altering the appearance of the page, viewing filters, and delivering the page information via a printer or PDF file.

We will be discussing the details of each of the menu action items in modules relevant to their functions. I do however want to point out the Help menu. The three items located within this folder will prove to be very helpful as you learn and navigate the Compass Analytics application.

Clicking the Content Icon will Launch the Compass online Help file which contains documentation relevant to the Compass Applications. The content is broken down by subject area or you can search by key words.

“Send Log File” can be very helpful if you are working with the advice line. This file contains technical details from the application and can help identify potential issues.

And finally the “About Icon” opens an information window that identifies the current running version of Compass. This is valuable information if you are working with an Advice Line agent or if you want to validate your version against the current general release.

Another area to note within the application is the Launch Pad. The Launch Pad is located on the left side of the application and can be used to access other products in the Compass Suite of Applications or to access recent reports or analytic queries or pages that you have saved to your favorites folder for quick retrieval. Simply click on the Launch Pad Menu Item to view the contents of the folder.

You can toggle between a locked or auto-hidden Launch Pad by clicking the push pin located in the top right of the Launch Pad.

## The Power of Compass Analytics

The true power behind this product is the flexibility in which it can deliver information. Compass Analytics has the ability to run reports on the fly, meaning you can create a report as you think of it, you can save reports to be accessed on demand, and you create reports to be auto delivered via email, printer, ftp, local folder, or shared drive. The auto delivered reports can also be scheduled to deliver the information at a particular time and day, to run monthly, or you can set up reports to run but only send you the output file if it returned a result.

Think of all the time you have spent in the past loading viewers to find pieces of information. Maybe you had a viewer that would show you low margin items in a particular department. In order to monitor the items correctly you would have had to manually retrieve that viewer every day, wait for it to load, and then determine which items required attention.

With Compass Analytics you can create a report that shows only the exception items, tell it to run every day at a particular time, and only to send you the results if there were items that met your set criteria.

While this traditional viewer continues to load let’s take a look at what this same experience would look like if we wanted to retrieve a similar report on demand in the Compass Analytics Application. Now a traditional viewer is a flat file database which requires all the data to be loaded into the grid prior to applying a filter. It also can only access one dimensional data, meaning if we open an inventory viewer it can only look at the inventory file. With Compass utilizing a MySQL relational database we can report on the information we want in a much quicker manner. Compass will pull only the data requested into the grid and allow us to perform cross cube analyses. In this example of the same report, only better, we are able to view the items sold, their actual and desired GM%,

who sold it, who purchased it, and if we wanted to we could double click on a line item and drill directly into Quick Recall to see the entire invoice and image.

Along with exception based reporting you can create analytics to track trends, identify areas of Loss, potential categories for growth, and truly keep your finger on the pulse of your business. The other modules in the Compass Analytics series will provide you the tools needed to unlock the power of this amazing application and allow you to turn the lights on.

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