

An Epicor® White Paper

The Rise of Mobile Access to Your ERP Data





Abstract

Mobile user access to ERP and other back office systems has become a core requirement as organizations seek operational efficiency and deepening customer engagement. Without mobile access, system users are disadvantaged by needing to return to a desktop, often after a job is completed, to enter data relating to that job and get information about other jobs. Frequently that information is not entered at all and become more of a hindrance to user adoption of your ERP investment.

Mobile users increasingly are looking for ease of access to ERP information to perform their jobs on any device at any time. This requires the mobile solution to handle:

- ▶ Different mobile devices and applications for different roles/jobs
- ▶ Ability to be used by staff with limited computer or language skills, in adverse conditions (variable lighting, distractions/interruptions, potential for device to be damaged.)

In this age of “bring your own device” or BYOD, mobile devices are affordable, mainstream, reliable, secure, and scalable to run multiple applications. We are now able to prove return on investments from those organizations that have implemented mobile solutions and developed BYOD policies.

In today's environment, mobile solutions are seen as core drivers of organizations pushing to gain operational efficiencies over their competitors. According to a recent report from Aberdeen Group, “enterprise mobile apps in 2013 are no longer ‘nice to have’—they’ve become essential enablers of organizational transformation, by increasing operational efficiency, accelerating time-to-decision, deepening customer engagement, and streamlining workflow processes.” (Source: Aberdeen Group, “Enterprise-Grade Mobile Apps: Powering Organizational Transformation,” by Andrew Borg, April 2013.)



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Who is a Mobile User?

It used to be that a mobile user was defined as a person that had a specific operational function and was out in the field. With the proliferation of smart devices these days, this is not the case. In today's world of Apple® iPhone®, Android™ smartphones and tablets such as Apple iPad® and Microsoft® Windows® tablets, a larger subset of workers with a need to access ERP data is asking for it. In the figure below from a research study by Aberdeen Group, you can see the distribution of mobile app development across platforms and how each one is increasing, especially tablets. These users range from the executive that is out and sees the benefit of faster “time to decision” to a sales person that needs to access inventory data in front of a customer to get the business.

Mobile users are driving this requirement to not be chained to their desk. The majority of ERP workers are growing up with the ability to instantly access information and interact with that information wherever and whenever. These same users are expecting the same thing with their ERP data and are making this a requirement.

Types of Mobile Devices

With so many smartphones, tablets, and other types of mobile devices, it can become confusing to know which will work best. That answer depends on a number of factors; cost, environment, signal access, security, and function should all be taken into consideration when deciding what mobile device to use in your mobile strategy.

Handheld

Handheld mobile devices have been around for many years; usually they have a gun or PDA form with a scanner. They will run a few different types of operating systems, but the standard is Windows CE. This type of device is found in warehouses or shop floors and because of the function and price of them, they stay within the organizations infrastructure and usually are not meant to be used in the field. For manufacturers, they are used for scanning a job traveler or other job documentation, to see what needs to be done and document what is done on the shop floor. For distributors, they provide efficiency in the warehouse for picking, packing, shipping, and receiving.

- ▶ Windows OS support
- ▶ Long battery life
- ▶ Long model life
- ▶ Rugged outer shells
- ▶ Expensive
- ▶ Small screen size
- ▶ Limited upgradability



Purpose-built device

Purpose-built mobile devices are usually built around either specific company requirements or functional requirements and tend to be very expensive and used for both internal and external processes. These devices take many different forms, depending on environment and how they will be used. They are great for a workforce that have rigid processes or need a simple device that does exactly what they need.

- ▶ Custom built for company
- ▶ Built for specific functions
- ▶ Long battery life
- ▶ Designed to be used outside and inside the organization
- ▶ Difficult to upgrade
- ▶ Usually single purpose
- ▶ Expensive

Smartphone

Today's smartphones are becoming just as powerful as most desktops and are inexpensive. With the ability to connect to the Internet and download applications on them, more and more end users are purchasing smartphones for their consumer needs. Piggy backing on that move to general smartphone use, consumers are looking to use these devices to access and process ERP data. This is one of the main drivers for companies to start developing mobile strategies outside of the typical mobile needs seen for years. With major technology companies such as Microsoft, Apple, and Google backing this market, we are seeing pressure to be able to support these devices in company's mobile strategies.

- ▶ Fits BYOD (bring your own device) policies
- ▶ Separates hardware from software
- ▶ Easy to use
- ▶ Inexpensive
- ▶ Small screens
- ▶ Have to maintain multiple device configurations
- ▶ Short battery life
- ▶ Not made for harsh environments

Tablets

Relatively new to most end users, tablets have been used for a while, but with technology enhancements and price points coming down, they have become more mainstream. "In just three years, tablets have overtaken smartphones in the amount of traffic they drive." (Source: Adobe Digital Index, "The State of Mobile Benchmark," Q2 2013). Ease of use, more powerful mobile hardware, larger screen size and touch screens are the main drivers to adaption of this platform. Tablets today, can and do take over a lot of ERP functionality that was traditionally done on workstations back at the office. Just like laptops have taken over desktops as the way to access ERP, because of the need to work remotely. Tablets are seen as the next evolutionary step in this process.



“While tablet and smartphone consumers are both mobile users, they behave differently. Tablet users actually behave more like PC users in the way they browse and engage.” (Adobe Systems Incorporated, 2013)

- ▶ Fits BYOD (bring your own device) policies
- ▶ Separates hardware from software
- ▶ Easy to use
- ▶ Inexpensive
- ▶ Large screens
- ▶ Have to maintain multiple device configurations
- ▶ Not made for harsh environments (Can purchase cases at extra cost)

Why the Shift?

User pressure to be able to access ERP data is not the only compelling reason there is to adopt mobile solutions. We also see influence from companies themselves as mandate to gain operational efficiencies and providing a competitive differentiation as drivers. Mobile accessibility is identified to be one of the core drivers of process realignment, improving collaboration and communication and offering a new channel for products and services to gain these efficiencies and differentiation. Studies have shown a year over year increase in demand for these disciplines to be implemented.

During process realignment, this is driving the requirements in mobile application for things such as approvals, notifications, business intelligence, product and contact management and work queue management. Instead of having to go to a traditional workstation to access these functions, companies are able to see the benefits of moving this functionality to a mobile form factor. Mobile users are quickly able to engage in their day-to-day activities and work more efficiently.

Working with ERP data on a mobile device, users are able to provide feedback and make changes to daily issues as they present themselves. Allowing better communication and collaboration based on data transparency for the whole organization as that organization works on the challenges. By having these real-time transactions in executive hands, there is a shorter time to decisions, which helps organizations gain the efficiencies that are required.

As the back office employees are putting in price changes, new and complementary products into the ERP system, front office field personal are quickly notified on their mobile device. In addition, they can quickly see order status, place orders and receive service acknowledgments. This allows the field to provide better customer service and also allows them to upsell products and services.



Why Epicor?

Epicor has been in the mobile space for many years, with handhelds to help shippers and receivers accomplish their task in the warehouse and with purpose-built devices using Windows mobile for field service jobs. Today, we still provide this functionality and have enhanced it with the mobile applications that can be downloaded to standard smartphones and tablets. Now more than ever it is easier for the customer to implement their mobile strategy. We take a very bottom-up approach to our mobile initiatives:

- ▶ Epicor Identifies user types and workflows that make the most sense for mobilization
- ▶ Designs appropriate mobile solutions (a combination of device, application, and connectivity options)
- ▶ Integrates to Epicor® ERP systems using a proven mobility synchronization technology
- ▶ Provides options for purpose-built devices, handheld, smartphones, and tablets where appropriate.

Benefits to the Company

For a company that is using Epicor applications, there are a lot of advantages to using Epicor mobile solutions instead of third-party applications.

- ▶ Experience in mobile applications
- ▶ As publishers of Epicor applications, understand the data structure and workflow
- ▶ Integration is maintained by Epicor
- ▶ Easy to implement
- ▶ Can be used on purpose-built devices, handhelds, smartphones, and tablets
- ▶ Secure connection
- ▶ Easy user maintenance
- ▶ Forms toolset is easy to use and add company specific workflows

Benefits to the End User

The end users will appreciate the ease of use within Epicor mobile applications. Instead of having to do their work in a vacuum out in the field and then update data once they get back to the shop, workers can immediately access ERP and act upon it right there, eliminating errors or the lag to get the data into the system. For executives, they are able to see a real-time view of what is happening out in the field and have accurate and faster times to decision when it is needed, giving them the confidence that what and how business is being conducted follows their strategic initiatives.

As workers spend more time remotely, utilizing Epicor mobile provides the flexibility to get access to the data anytime from any device, based on your policies and security requirements. This makes for a more productive and happy workforce.



Future of Mobile

The user interface or presentation layer of ERP applications have been going through an evolution. From green screens, to windows forms on workstations, to smart Web forms accessible through Web browsers. Users are demanding to be able to interact with their ERP data anywhere from any device. Balance that with the need for organizations to secure the data and make sure it is accurate by applying workflow to business processes. Mobile access will become more common and the primary way end users will access ERP applications.

As this becomes more mainstream, companies are already reaping the benefits in increased productivity, greater efficiencies and lower cost. Requiring companies such as Epicor that build these applications to have a strategy in place that moves mobile access from a nice-to-have add-on, to a principal way end users will interact with the application.



About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 40 years of experience with our customers' unique business processes and operational requirements is built into every solution—in the cloud, hosted, or on premises. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, [connect with Epicor](#) or visit www.epicor.com.



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