

TECHNOLOGY VALUE MATRIX FIRST HALF 2014

ERP



THE BOTTOM LINE

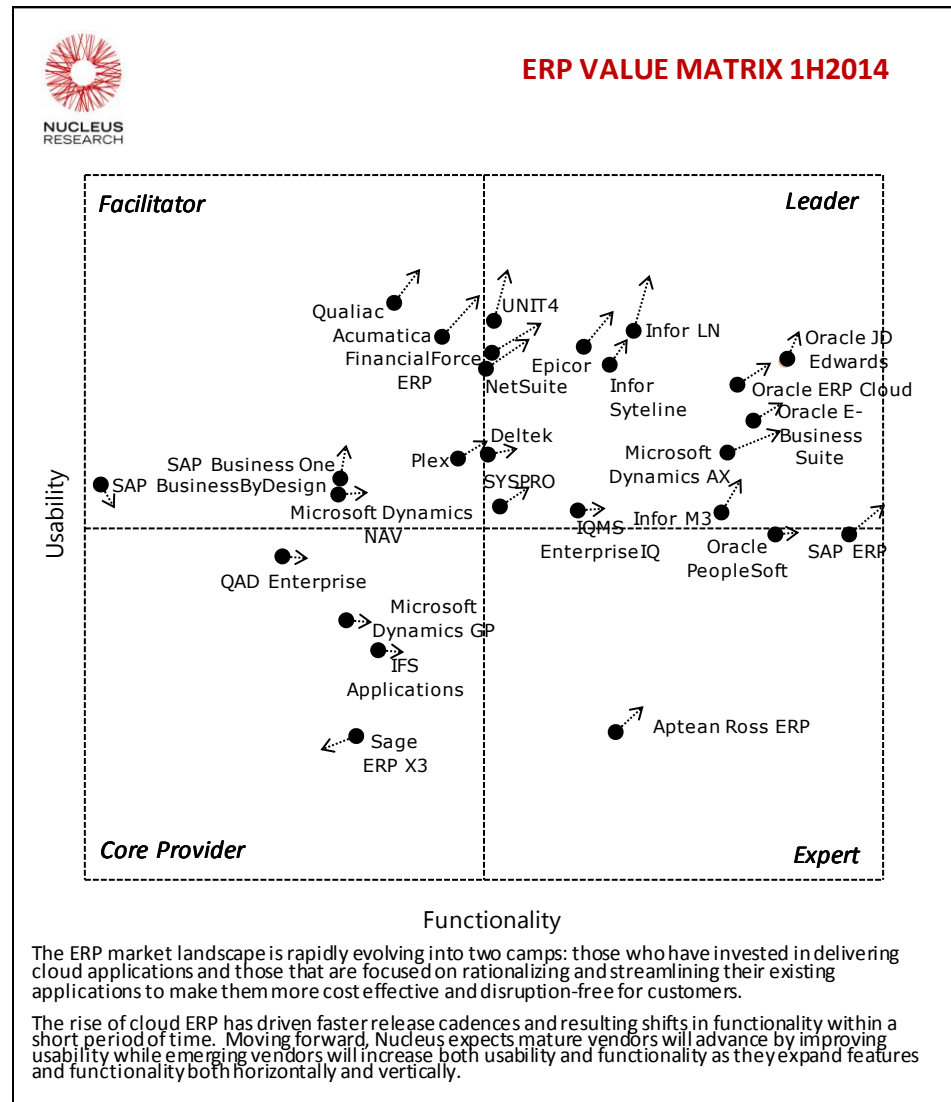
The enterprise resource planning (ERP) market continues to mature; however, new entrants with unique value propositions and existing vendors making significant investments in usability and functionality make it an evolving landscape. Cloud is increasingly popular, and mobile access is now a critical baseline capability. As companies look to consolidate or modernize their ERP environments, they seek vendors that are providing not just advances in functionality and usability but thought leadership and a clear migration path that helps them get more value from innovation without significant cost and disruption.

As the enterprise resource planning (ERP) market matures, ERP has almost become a misnomer, as enterprise applications to support the core pillars of business — finance and accounting, supply chain, customers, and human resources — extend far beyond the traditional ERP definition and technology footprint to include embedded analytics, content and collaboration capabilities, and other innovations.

Many companies today are seeking to either consolidate or rationalize their ERP footprint and many, looking at a potential upgrade that is more of a reimplementation in terms of scope and cost, are re-examining their vendor strategy. Vendors' evolving ERP investments are also changing mindsets about customization. In the past, companies looked at customization as a way to address key vertical needs or functionality gaps in the core packages provided by vendors. Today, with most leading vendors providing vertical and even microvertical roadmaps, templates, and functionality, most customers considering an upgrade are finding much of their existing custom code can be replaced by core non-custom features and capabilities now in the latest version of the software, so an upgrade can mean a significant reduction in ongoing management costs.

The ability of vendors to drive penetration strategies in different key areas is evolving as well. With a mix of publicly-traded, privately-held, and recently-funded players across the quadrants of the Matrix, Nucleus expects to see some without the quarterly constraints of the stock market take advantage of that flexibility to make some very focused short-term investments to capture market share. Others will still have to carefully balance their

significant and closely-watched maintenance revenues with investments in innovation and adoption of new solutions.



LEADERS

Leaders in the ERP Value Matrix for the first half of 2014 include Deltek; Epicor; FinancialForce ERP; Infor LN, M3, and Syteline; IQMS EnterpriseIQ; Microsoft Dynamics AX; NetSuite; Oracle E-Business Suite, ERP Cloud, and JD Edwards; SYSPRO; and UNIT4.

DELTEK

Deltek has developed deep functionality in enterprise resource planning (ERP) applications for the professional services, government contracting, and project-oriented businesses, with key capabilities for areas such as professional services, architecture, and engineering.

Specific Deltek solutions include Acumen, Costpoint, Vision, Maconomy, and Deltek's cloud ERP solution, Deltek First. Given the common level of capabilities across its portfolio as well as Deltek's move toward a more unified product suite, Nucleus has positioned Deltek's overall portfolio in one dot in the Leaders quadrant of the Matrix.

In November, Deltek announced version 5.0 of Acumen, with deeper project management capabilities across the Acumen product suite. In March, Deltek announced the acquisition of Sohna and its Traffic LIVE solution, adding to Deltek's cloud-based project management capabilities in areas such as creating estimates and quotes, scheduling resources, capturing time worked, and using more detailed data to bill clients.

EPICOR

Epicor's ERP solution, built on a 100 percent .NET service-oriented architecture (SOA) framework, and its ICE business architecture provides a stable yet flexible ERP that can be extended to meet the needs of manufacturers, distributors, retail, and services organizations while supporting the social and technical aspects of Web 2.0. Additionally, because the Epicor Everywhere Framework supports all client business logic as metadata in XML, Epicor applications can be accessed via smart clients, Web clients, or mobile devices without the need to support multiple interfaces or custom code.

Since the last edition of the Matrix, Epicor has extended its implementation partner network as well as building out capabilities to support that network, including the introduction of its Enhanced Signature Methodology in February, designed to help partners drive more predictable, scalable implementations.

FINANCIALFORCE ERP

FinancialForce ERP is a unified suite of cloud applications based on the Salesforce1 platform. It appears in the Value Matrix for the first time in this edition based on its growth, both organically and by acquisition, over the past 6 months, to provide capabilities including:

- Financial management, including accounting, revenue recognition, spend management, and fixed asset management.
- Ordering and billing, including advanced quoting, contract management and recurring billing, and media billing.
- Supply chain management, including order fulfillment, configure price quote (CPQ) capabilities, contract management, inventory management, and supplier management.
- Professional services automation, including resource management, time and expense management, project management, project accounting, and service resource planning.
- Human capital management, including human resource management, benefits administration, and compensation.

FinancialForce recently unveiled its new tagline, “ERP at Customer Speed” and its vision for ERP where businesses win and retain customers by aligning ERP processes around key customer touch points. Founded in 2009, FinancialForce.com is backed by UNIT4, a European ERP provider (and leader in this Matrix), and Salesforce.com. Nucleus found its use of a single database, development platform, and common collaboration and reporting capabilities drove additional benefits including improved collaboration and productivity; reduced development, integration, and support costs; and greater visibility for better decision making.

INFOR LN

Infor’s LN ERP solution is targeted at enterprise and midmarket businesses in industrial machinery and equipment, general manufacturing and distribution, high tech, automotive, and aerospace and defense. Support for global financials and compliance as well as strong capabilities for service lifecycle management, project management, and supply chain management are functionality differentiators for LN. Overall, LN has benefited from the investments Infor has made in ION, user interface, and microvertical capabilities to reduce customizations, which ease the path for future upgrades and reduce ongoing support and maintenance burdens. Infor has also continued to push its “open” message with advancements on the LN front, the most recently being an announcement on April 16 of a joint collaboration with Red Hat and EnterpriseDB to make LN available on PostgreSQL.

LN has continued to benefit from Infor’s investments in usability (Nucleus Research *o58 – The Infor strategy for UI*, April 2014) and cloud as well as its microvertical capabilities for partners with Mongoose. In March, Infor announced Infor CloudSuite on Amazon Web Services, including Infor LN.

INFOR M3

Infor M3 moves into the leaders quadrant of the Matrix for the first time in the first half of 2014, largely because of the customer wins and increasing momentum Nucleus has seen resulting from Infor’s investments in modernizing M3 including:

- In October 2013, Infor announced a new M3 application with specific micro-vertical functionality to support the planning process for fresh food manufacturers.
- In October 2013, Infor also announced UpgradeX, a path for existing customers to upgrade their existing Infor applications to the Infor Business Cloud (Nucleus Research *n160 – Infor announces UpgradeX*, October 2013).
- In February, Infor announced availability of M3 release version 13.2, with dedicated new solutions for customer lifecycle management (CLM), fashion product lifecycle management (PLM), fast food planning, and customer relationship management (CRM) for the equipment industry, and across-the-board incremental functionality enhancements, as well as Infor 10X certification to make it completely compatible with Ming.le and Business Intelligence (BI).

- In March, Infor announced availability of Infor CloudSuite on Amazon Web Services, providing complete M3 capabilities via the Amazon cloud.

Nucleus continues to closely track the adoption and migration to the latest version of M3 as well as the results of Infor's investments in usability innovations such as progressive reduction, which have the potential to propel M3 and Infor's other solutions significantly further in usability by leveraging the intelligence of the software to drive more intuitive and user-centric interfaces.

INFOR SYTELINE

Infor released SyteLine 9 in November 2013, which included:

- Support for single instance or multi-site database functionality
- New features to support cloud deployments
- A new user interface based on Infor's 10x investments
- Support for user-defined compliance programs
- Support for multiple financial sets of books, a separate year-end adjustment period, and multiple year-end dates
- Support for promotional pricing and rebate programs
- Accounting support for managing fluctuations in commodity prices and surcharges
- Support for InforMing.le to start conversations, embed documents, drill back to previous objects and see resolution of an item within the same system.

From a usability perspective, SyteLine 9 introduces an innovative meshing of Infor's classic interface and SyteLine's new modern user interface. Infor is promoting the new user interface to manufacturers but is offering the capability to allow managers and principals to select the workers who will use the new UI and who will remain using the old UI. More mature or experienced workers who are trained and skilled on the original UI will likely continue to use it while newer workers more comfortable with the modern interface will upgrade to the new system that is easier to use and requires less training. This will enable companies who want to take advantage of the new functional capabilities of this upgrade to do so with less disruption of users (Nucleus Research *n177 – Infor releases SyteLine 9*, November 2013).

SyteLine has continued to benefit from Infor's investments in usability (Nucleus Research *o58 – The Infor strategy for UI*, April 2014) and cloud as well as its microvertical capabilities for partners with Mongoose. In March, Infor announced Infor CloudSuite on Amazon Web Services, including Infor SyteLine.

IQMS ENTERPRISEIQ

IQMS EnterpriseIQ provides manufacturing ERP capabilities for a broad number of industries including aerospace and defense, automotive, medical devices, and plastics. IQMS also provides customer relationship management, supply chain management,

warehouse management, and human resource management capabilities. In March, the company announced a new release of EnterpriseIQ with new capabilities including:

- Advanced warehouse management system, including modules of expected receipts, wave management for picking and work order staging, and dock scheduling.
- A customizable online shopping cart to streamline conversion and delivery of Web sales orders.
- E-mail tracking support for advanced marketing campaigns.
- Inventory cost adjustment.
- New business intelligence and reporting capabilities including enhancements to IQAlert and production reporting.
- Enhanced maintenance, repair, and overhaul (MRO) capabilities.

MICROSOFT DYNAMICS AX

Microsoft continues to position Dynamics AX as a competitive enterprise application to support global businesses' multi-language and multi-currency requirements. Dynamics AX 2012 R3, scheduled for release on May 1, includes a new applications and services framework to enable businesses to develop and distribute custom applications for mobile devices. Although Microsoft has already made available a number of mobile-enabled applications, such as timesheets, time and expense reports, and mobile POS, the applications and services framework and the capabilities in Project Siena (now in beta) enable non-developers to rapidly build mobile applications and securely connect them with Dynamics AX through Windows Azure and Microsoft Active Directory Federation Services — without any separate middleware or other software. This is a significant step in usability for AX as well as an opportunity for partners to deliver more industry-specific functionality.

The new release also includes support for deployment on Windows Azure, with preconfigured environments to speed deployment, and Dynamics Lifecycle Services, to help improve the predictability of their implementations and accelerate issue resolution (Nucleus Research *o42 – Microsoft Convergence update*, March 2014).

NETSUITE

NetSuite, the first cloud ERP provider, has continued to advance in usability and functionality with both organic development and acquisitions and OEMs to drive adoption in its key industries: retail, wholesale and distribution, professional services, software, and manufacturing. The cloud delivery model and the single database driving greater visibility across the key pillars of business – HR, finance, production, ecommerce, and CRM – continue to be strong differentiators for NetSuite and NetSuite has the most customers of any cloud ERP provider (Nucleus Research *o24 – What NetSuite's growth means for ERP*, February 2014). Nucleus continues to see NetSuite customer wins based on the breadth of NetSuite's capabilities, with CRM, e-commerce, manufacturing, and services resource planning capabilities adding value to the core ERP. NetSuite's approach enables

customers to tie intelligence about what is happening on their Web sites and Web stores into the back office in real time.

In October, NetSuite extended its capabilities in HR with the acquisition of TribeHR (Nucleus Research *n164 – NetSuite brings ERP and HCM together*, October 2013). NetSuite also has an OEM relationship with Adaptive Insights, by which Adaptive Insights's powerful analytics capabilities are layered on the NetSuite data model to provide users with greater visibility across the supply chain for more effective decision making.

In December, NetSuite announced NetSuite for iPhone version 2.1, to enable business users to access and act on ERP data from their iPhone.

Over the past six months, NetSuite has also extended its global implementation partner network to support the development and delivery of NetSuite to customers.

ORACLE ERP CLOUD

Oracle ERP Cloud, based on Oracle Fusion Applications, continues to deliver functionality across core ERP areas. In September 2013, Oracle announced enhancements in key areas including financials, procurements, project portfolio management, and supply chain management. In November, Oracle also announced further investment in its global cloud capabilities to support Oracle ERP Cloud deployments, with four new cloud data centers. In March, Oracle announced availability of Oracle ERP Cloud version 8, with a new, more easily customizable user interface, new developer tools, and enhanced capabilities for project execution and project management, revenue management, time and labor, and planning and budgeting.

ORACLE E-BUSINESS SUITE

Oracle's investments in the past six months around Oracle E-Business Suite have been primarily focused on leveraging Oracle's in-memory capabilities to help companies make faster and better decisions with large sets of existing E-Business Suite data. In February, Oracle announced In-Memory Cost Management for Process Industries for E-Business Suite, to enable process organizations in natural resources, life sciences, food and beverage, chemicals, and consumer goods have real-time insight across areas of cost management to improve margins.

ORACLE JD EDWARDS

Oracle JD Edwards maintains its position as a leader in the Matrix based on Oracle's existing investments in usability and functionality that have continued to gain JD Edwards new customer wins and customer upgrades. The JD Edwards team has added 36 new patents to the technology portfolio over the past two years. Investments that continue to drive JD Edwards's position in the Matrix include:

- Mobile applications. Oracle has delivered more than 30 custom JD Edwards mobile applications since January based on the Oracle ADF Mobile Framework.

- A move to agile development. JD Edwards's move to 100 percent agile development is enabling it to drive greater involvement of JD Edwards special interest groups (SIGs) with faster time to delivery for functional demands, with a release schedule planned for a major release every three years and incremental releases four times a year.
- Support for emerging technologies. JD Edwards labs have continued to invest in emerging technologies such as machine-to-machine data support, Google Glass integration for warehouse innovation, gamification, and composite applications as well as optimized use of tablets for broader adoption and use of the application.
- Leverage of in-memory capabilities. Expanding use of in-memory capabilities for data visualization, JD Edwards continues to deliver new capabilities for user groups such as planners and buyers.

The JD Edwards 9.1.4 Tools release added new capabilities including tablet signature capture and greater personalization.

SYSPRO

SYSPRO maintains a strong position as a leader in the Value Matrix based on its latest release with core features for usability including a tile-based user interface, enhanced mobile capabilities, and support for streamlined customization and configuration. A core differentiator for SYSPRO remains its hands-on approach to customer service and customer issue resolution, providing thought leadership that is often critical to the success of lower midmarket manufacturing companies. Although SYSPRO's heritage and focus is largely SMB centric, the solution scales with multiple customers that have grown to tier-1 one size organizations.

UNIT4

UNIT4 provides ERP capabilities for people-centric companies in the mid to upper midmarket, including financial services, nonprofits and government, education and research, retail, and wholesale and distribution. UNIT4 moves into the Leaders quadrant of the Value Matrix in this edition based on its investments in both vertical and horizontal functionality, including its multitenant cloud ERP capabilities, its advanced mobile support, and new user interface featuring integrated analytics and social collaboration capabilities. Its next generation ERP Suite, Milestone 4, includes Experience Packs, which are designed to enable targeted upgrades of functionality with less disruption to customers.

EXPERTS

Experts in the Value Matrix include Aptean Ross ERP, Oracle PeopleSoft, and SAP ERP.

APTEAN ROSS ERP

Ross ERP is built for process manufacturers looking for a complete solution to manage formula and recipe-based manufacturing. Its core features include financial management,

manufacturing and distribution management, traceability (TraceExpress), and contracts and chargebacks management.

In November 2013, Aptean announced Ross ERP version 7.0.3, which builds on the 7.0 platform that introduced Ross Document Connect (document management with SharePoint integration) and Ross Mobile, while improving functionality to better unify the user interface and achieve improved compliance. New features include allergen management, backflush of lot controlled products and bin locations, tank management, Single Euro Payment Area (SEPA) controls, and product lifecycle management integration, as well as enhancements in centralized pricing, deals and promotions, and reporting services.

Through the Aptean business platform, Ross ERP users can easily incorporate other applications like Pivotal CRM or Factory MES to enable data sharing between systems for planning, executing, and measuring production.

ORACLE PEOPLESOFT

Oracle's investments in the past six months to support PeopleSoft have been focused on taking advantage of Oracle's in-memory capabilities to help companies analyze large sets of transactional data for better decision making:

- In March, Oracle announced the general availability of Oracle's PeopleSoft In-Memory Labor Rules and Monitoring, enabling managers to make more strategic decisions around employee time and labor by rapidly analyzing exceptions and trends in labor data and take advantage of Oracle Policy Automation to establish, modify, and implement rules based on their insights in a production environment.
- In January, Oracle announced the general availability of two new Oracle In-Memory Applications: In-Memory Financial Position Analyzer and Oracle's PeopleSoft Financial Allocations Analyzer, to enable the office of the CFO to make more informed decisions.

SAP ERP

SAP ERP continues to maintain a strong position in the Value Matrix as the provider with the greatest depth and breadth of functionality, supporting more than 25 industries, 37 languages, and 46 localizations. Over the past six months, SAP has continued to advance in its investments to make SAP less complex, more rapid to deploy, and more intuitive for end users with a number of initiatives including:

- HANA. SAP HANA has evolved from a database to a platform for high-performance applications, with customers across industries moving their ERP footprint to HANA to take advantage of the rapid computing capabilities and ability to manage and analyze large volumes of data in real time. Nucleus has found key motivators for moving SAP ERP to HANA include process re-engineering, real-time process enablement, and business growth, and SAP is investing in specific solutions, partners, and value discovery workshops to help customers target how they can gain the most benefit

from HANA in their industry and business environment. To date, SAP claims more than 800 Suite on HANA contracts, more than 200 live Suite on HANA projects, and more than 7,600 partners trained on HANA.

- **Design Thinking.** SAP's user experience strategy follows the common themes of other leaders in usability including the introduction of a non-developer design team, flexible design spaces, and adopting the consumer user experience. These new design tenets are fine for new applications, but the bigger question is how to bring a more intuitive user interface and greater usability to existing SAP customers without a costly and disruptive upgrade path. SAP's goal is to have a unified user experience direction for all applications, and SAP is betting on Fiore.
- **Fiore,** SAP's HTML5-based application platform, continues to support ongoing delivery of mobile applications that provide users with access to the most commonly-used SAP functions on mobile devices. Nucleus has seen some innovative uses of Fiore, particularly in the area of analytics and dashboarding, that enable users to access real-time information for decision making within an interface that is designed for their role and work environment. Fiore's design principles are relatively straightforward:
 - > Decompose application functions into task-based experiences
 - > Optimize for all devices, versions, and channels
 - > Make applications coherent across use cases and devices

Based on the direction and scale of investment SAP is investing in these resources, and SAP's renewed focus on increasing business value, lowering IT costs, and engaging users with more intuitive apps, Nucleus sees potential for SAP to both cement its positioning in much of its existing customer base with modernization initiatives and win new customers that would not have considered "the old" SAP.

FACILITATORS

Facilitators in the Matrix include Acumatica, Microsoft Dynamics NAV, Plex, Qualiac, SAP BusinessByDesign, and SAP Business One.

ACUMATICA

Acumatica provides a cloud-based ERP solution for small and medium-sized businesses. Acumatica follows a completely partner-led strategy, with a complete set of modules so partners can extend and customize the solution to meet customer needs in specific verticals and microverticals such as construction, for example.

In November 2013, Acumatica announced that it had raised \$10 million in a Series C funding round led by Runa Capital and Almaz Capital, to support further research and development, branding, and partner channel development efforts. In early 2014, Acumatica announced a new CEO, Jon Roskill, who brings extensive enterprise software

experience as well as a number of years of experience driving Microsoft's partner channel (Nucleus Research *o52 - New Acumatica CEO plans for growth*, April 2014).

In April, Acumatica announced availability of version 4.2, with enhanced contract management support, support for subscription billings, support for PCI compliance, and automated lead management. Version 4.2 also added pricing and discounting engine capabilities to support faster pricing and processing and enhanced project accounting features. At the same time, Acumatica also announced that Acumatica saas was running on Amazon Web Services and, on an on-premise basis, Acumatica could support multi-server deployments for high availability.

Core differentiators for Acumatica continue to be its .NET-based modular framework that enables any developer to customize the application using Visual Studio languages and the configuration capabilities at the end-user level that allow users to extend and change the application screens using a Web browser.

MICROSOFT DYNAMICS NAV

Microsoft Dynamics NAV is positioned to support the ERP needs of small and medium-sized businesses. Dynamics NAV R2 was released in October 2013 with enhanced cash management features, multitenancy support, and integration with Microsoft Azure and Office 365. At Convergence, Microsoft announced new mobile capabilities planned for NAV's next update in the fourth quarter of 2014 (Nucleus Research *o42 - Microsoft Convergence update*, March 2014).

PLEX

Plex includes capabilities for accounting and finance, business intelligence, customer and sales management, human resources management, inventory management, product and program management, quality management, and supply chain management for manufacturers. Plex moved to the facilitator quadrant of the Matrix this spring, largely based on the advances competitors have made in the past six months around manufacturing functionality and capabilities.

QUALIAC

Qualiac has a long history in the European ERP market, with more than 500 deployment sites and 50,000 users. Qualiac lists reference clients in the finance and banking, insurance, real estate, health care, manufacturing, chemicals and pharmaceuticals, media and publishing, nongovernmental organization, and public sectors. Qualiac is available both in the cloud and on-premise.

Qualiac's configuration (rather than customization) approach enables companies to more rapidly deploy Qualiac and take advantage of knowledge transfer during the deployment process so business analysts and managers can make changes in the application based on changing business needs without additional consulting costs or expertise.

This architectural approach provides companies with greater flexibility to make changes as business dynamics or regulatory requirements change, and also enables greater flexibility across divisions: subsidiaries can configure components and modules to meet their specific characteristics while maintaining a common core data model for enterprisewide visibility.

SAP BUSINESSBYDESIGN

SAP's original cloud ERP offering, Business ByDesign offers modules to support customer relationship management, financial management, project management, supply chain management, supplier relationship management, human resources management, compliance management, and analytics. In December, SAP announced new capabilities for Business ByDesign including:

- A new country version for Japan.
- Availability on the HANA platform to combine transaction processing and analytics, accelerating computing while enabling companies to more rapidly analyze data for decision making.
- New pricing capabilities to enable companies greater flexibility and the ability to drive special pricing to particular audiences or for specific product characteristics.
- A new mobile application, Business in Focus, enabling users to analyze budget forecasts, visualize financial information, and collaborate through an enterprise social network via iPad.

SAP BUSINESS ONE

In March, SAP announced general availability of the 9.0 version of the SAP Business One application version for SAP HANA. As a business management solution for small and midsize enterprises (SMEs) running on the in-memory computing platform SAP HANA, the application helps businesses improve application performance and analyze growing volumes of data in real time. The application is available on premise or in the cloud and hosted by partners.

The new version of SAP Business One for SAP HANA offers features that are only possible with the use of in-memory technology, enabling rapid analysis of structured and unstructured information. With insights from the predictive analytics capabilities of SAP HANA, SMEs are able to optimize business planning, operations and decision making while simultaneously gaining insight into new consumer trends and behavior.

CORE PROVIDERS

Core providers in the Matrix include IFS Applications, Microsoft Dynamics GP, QAD Enterprise, and Sage ERP X3.

IFS APPLICATIONS

IFS's component-based ERP suite is built on a standards-oriented architecture (SOA) foundation. The application focuses on supporting service and asset management, manufacturing, supply chain management, and project management. In October 2013, IFS announced expansion of its corporate performance management (CPM) capabilities through its partnership with VisionWaves. In October IFS also announced it had certified IFS applications on Microsoft Windows Azure, enabling customers to deploy IFS in the cloud.

MICROSOFT DYNAMICS GP

Microsoft Dynamics GP is focused on meeting the needs of midmarket organizations. At Convergence this year, Microsoft announced that the next update of Microsoft Dynamics GP, scheduled for release in the second quarter of 2014, will deliver new identity management and workflow capabilities, Windows companion applications, and enhanced integration with Office 365 and Microsoft Azure.

SAGE ERP X3

Sage ERP X3 supports the needs of small and medium-sized businesses for finance, sales, CRM, purchasing, inventory management, manufacturing, and operations. Sage continues to make investments in increasing functionality in areas such as analytics. Sage's partner-led model has left much of the development of industry-specific capabilities to its ISVs.

QAD

QAD provides ERP for global, multi-national companies in discrete and configured product manufacturers in industries including automotive, life sciences, industrial products, electronics, consumer products, and food and beverage. QAD offers its enterprise applications solution on premise and in the cloud. In January, QAD announced the latest version of its software, which added enhancements to its ERP application, with functionality to address products, people, and processes including:

- Built-in process maps for industry-specific best practices
- Vertical-specific cloud editions for automotive and life sciences, including the only FDA-qualified cloud environment for life science companies
- The ability to run QAD Enterprise Applications in a blended deployment with sites running on premise and in the QAD Enterprise Cloud
- Enhancements to existing analytics, enterprise asset management, and trade promotions management capabilities, as well as a new supply chain portal
- Additional business process management (BPM) capabilities
- Support for independent upgrades of dashboards and reports
- New capabilities to support and simplify product recalls
- The availability of 20 role-based dashboards for end-user visibility and fact-based decisions support
- Increased country support, with the addition of Brazil, Bulgaria, Italy, and the Philippines, bringing the total number of supported countries to 47.