

EPICOR

Human Capital Management







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 Production
- Data Collection
- Advanced MES
- Quality Assurance
- Quality Management System



Supply Chain Management

- Purchase Management
- Supplier Connect
- Supplier Relationship Management
- 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



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



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



Business Intelligence and Analytics

- Operational Reports/Dashboards/IIoT/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



Global Business Management

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

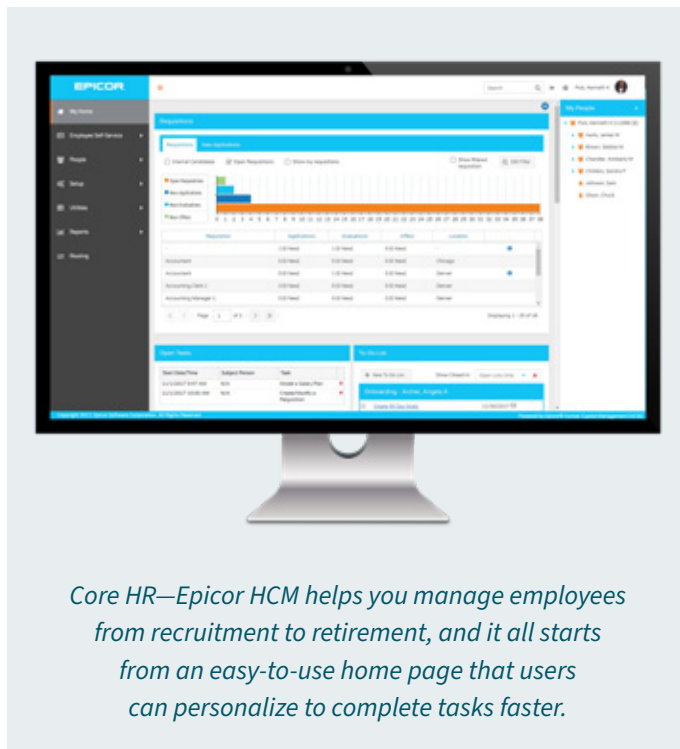
Contents

Core HR	6
Global HR	8
Candidate Self Service	8
Employee Self Service	9
Talent Management	10
Training and Development	11
Position Control	11
Timesheets	11
ADP Workforce Now Integration	11

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

Talent shortages and the changing nature of employment mean people must come first—even in the digital world. Businesses will not grow without a culture of growth that willingly embraces innovation and tackles game-changing initiatives. That means companies must help ensure employees feel inspired, productive, valued, and rewarded. Herein lies a powerful opportunity for HR professionals to help their organizations navigate the talent pursuit, take a leadership role in digital transformation, and guide the way forward. Epicor is ready to partner with you in this journey.

Epicor Human Capital Management (HCM) comprehensively automates HR functions from recruitment to retirement in a single software system, enabling you to track, manage, and analyze all data for your employees. Through automated workflow, you can improve your efficiency. With powerful reporting and analytical tools, you gain greater visibility into your company's workforce for better strategic planning. With seamless integration to your Kinetic (ERP), you gain a more complete view of your employees.



Core HR

HR professionals increase their value to the organization by helping decision-makers navigate workforce change. Access to accurate information is essential. The Epicor Human Capital Management software maintains your employee-related data in a single database—a true HR system of record that enables you to support your organization's strategic initiatives.

Usability

Epicor HCM offers a highly intuitive user experience, which enables users across all roles—including candidates, applicants, HR professionals, employees, and management—to quickly learn and adopt the system throughout the organization. Inspired by consumer software, Epicor HCM allows you to instantly navigate anywhere within the solution—you can launch new activities worry-free with the Epicor HCM auto-save feature, and the software notifies you if you miss a field in a task.



Epicor HCM has a powerful home page that serves as the launch pad for everything you and your users regularly do in the system. HR department users and administrators, business managers, and employees can personalize their home pages with their favorite data fields and tasks. With the Epicor HCM home page, everyone can securely and quickly complete their assigned tasks—improving overall efficiency.

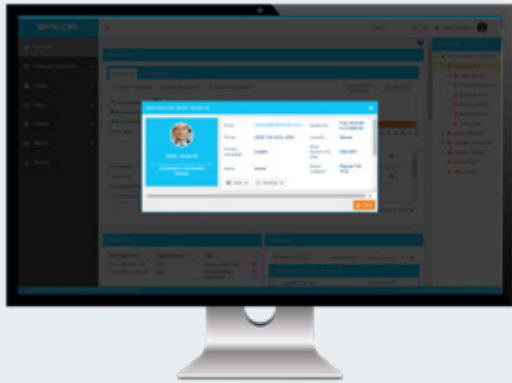
Reporting

Through graphs and charts, you can analyze applicant and employee data to better manage your workforce and improve strategic planning. You can analyze costs of turnover and hires, predict effects of salary increases, monitor salary increases against performance ratings, keep tabs on equal employment data, compare benefit programs, and much more. Epicor HCM provides a complete picture of your company's workforce for better strategic planning. Epicor HCM offers over 150 standard reports, including:

- Absence accrued cost by department
- Annual recruiting budget
- Applicant requisitions
- Qualification match
- Cost per hire
- Benefit statement
- Benefit enrollment by person
- EEO
- Drug test history
- Total compensation statement
- Audit report

U.S. Compliance includes:

- Affordable Care Act (ACA)
- Equal Employment Opportunity (EEO)
- Affirmative Action Plan (AAP)
- Veterans Employment and Training Service (VETS)
- Family Medical Leave Assistance (FMLA)
- OSHA Logs



Usability—Epicor HCM offers a pleasant user interface that expedites task completion, improves productivity, and supports employee satisfaction.

Integrations to Kinetic

Epicor HCM is integrated with Kinetic to help you collaborate on critical employee information through a more expedient and secure process. This integration simplifies your technology landscape by maintaining a single source of truth for employee leave,

Approved requests for paid time off (PTO) can be shared from Epicor HCM to Kinetic to give managers visibility to employee availability directly from within the ERP scheduler. Managers have the ability to create rules around PTO requests using workflows to help ensure they have appropriate coverage for any given period of time. An employee's actual time worked flows back into the HCM solution from Kinetic, allowing HR to run scheduling, payroll, and ultimately close the loop.

Absence Points System

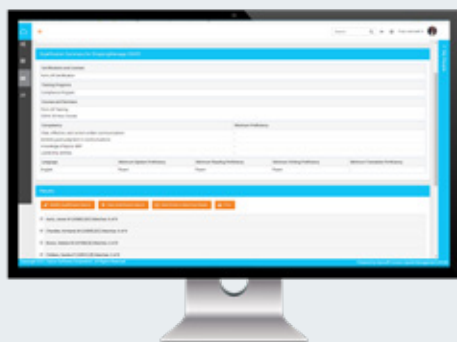
Support your absence and tardiness policies digitally with the absence points system in Epicor HCM. This system provides an integrated means to correlate absences with points and corrective action thresholds, making it easier to track and enforce on-time employee attendance.



Analytics

Epicor HCM integrates with Epicor Data Analytics (EDA) for a modern view of workforce insights to drive more informed decision-making for HR professionals. EDA provides interactive dashboards of HR information so you can easily review, understand, and act upon data. Its reports, graphs, charts, and filters are designed to be very user-friendly so that any team member can build and modify dashboards to fit their role. Types of HCM data that can be viewed as a dashboard with Epicor Data Analytics include:

- Absences
- Benefits
- Applications
- Requisitions
- Recruitment
- Qualifications
- Health and Safety
- Terminations
- Compensations



Candidate Self Service—Quickly identify potential candidates for your open positions.

Global HR

Epicor HCM is available via web-based access worldwide, automatically configuring data fields to reflect the appropriate format based on an employee location. Location-specific home pages deliver a blend of relevant communication and corporate standards at each site. The system can accommodate variable grades, different benefit and absence plans, multiple currencies, additional compensation types, and potentially different data tracking and reporting requirements. Epicor HCM enables employees to see their compensation in local currency or split payments into multiple currencies while maintaining the same information in the corporate currency for ease of reporting and analysis.

Select countries only. Contact your Epicor sales representative for more information.

Candidate Self Service

Epicor HCM gives you the tools you need to help you make the best possible hiring decisions and eliminate paper processes. Intuitive tools assist HR and hiring managers with workflows that walk you through the most common recruiting tasks—opening a requisition, interviewing, and hiring. Candidate Self Service allows individuals to submit online applications which are automatically connected to your HCM system and flow seamlessly to HR and hiring managers. Coupled with Core HR, this solution helps recruiters approve requisitions, filter applications through qualification matches and knockout questions, keep statuses updated, and record comments throughout the hiring process, shorten your recruiting process and control costs.

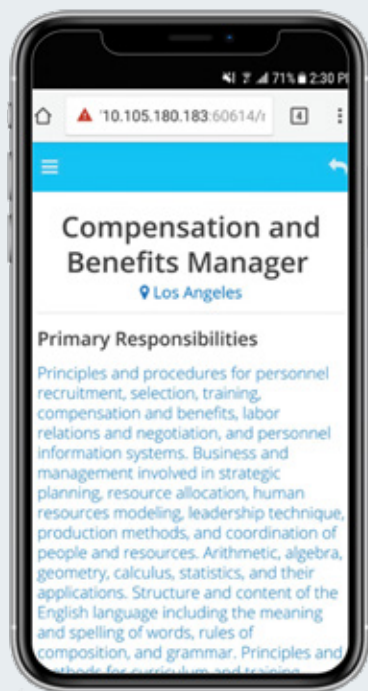
Recruitment functionality includes:

- Requisition management
- Job board integrations
- Skills search
- Job-opening cost tracking
- Evaluation tracking
- Drug-test tracking
- Onboarding

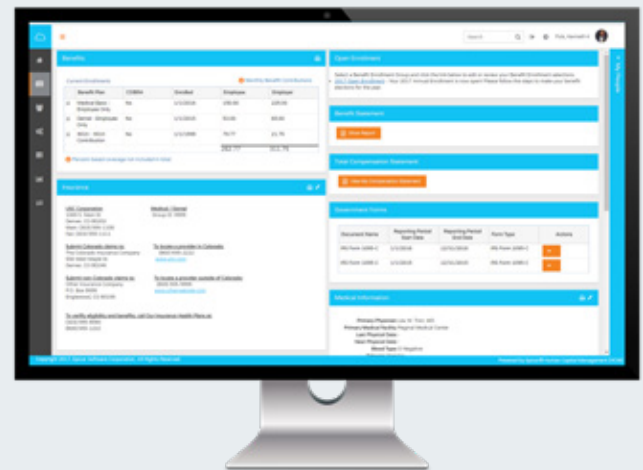


Mobile Candidate

Today's workforce is on the move and increasingly digital-first, so you need pragmatic tools that will attract tech-savvy talent. One of the mobile offerings in Epicor HCM, Epicor Mobile Candidate extends recruiting to reach more applicants for less through an innovative mobile portal.



Mobile Candidate—Reach more candidates for less with an innovative mobile portal that extends recruiting by allowing applicants to search your job openings and apply via mobile devices.



Benefits Management—Epicor HCM makes benefits administration easier with simple solutions, such as a data feed to your carriers using a Section 834 format, to eliminate duplicate data entry and reduce enrollment errors.

Employee Self Service

Adding employee self-service capabilities to your HR delivery methods is key to employee engagement, streamlining processes, and increasing service responsiveness across the organization. Epicor HCM Employee Self Service, creates a dynamic HR communication portal with easy-to-access information for employees at all levels of your organization. Allow employees to access their personal information whenever they like, find answers to common HR questions, manage benefits, view openings, and more.

Benefits Management

With Epicor HCM, administering your benefit plans is easy and efficient. You can track an unlimited number of benefit plans and manage complex benefit plans with ease. The Epicor HCM intuitive interface enables benefit administrators to easily input your organization's plans, options, and costs.

Key features include:

- Online open enrollment
- Online enrollment for life events
- Unlimited benefit plans and options
- Electronic signatures for benefit changes
- Rules and eligibility criteria
- Premium payment and employee contribution tracking
- Benefit cost and usage tracking
- Separations and continuation of coverage



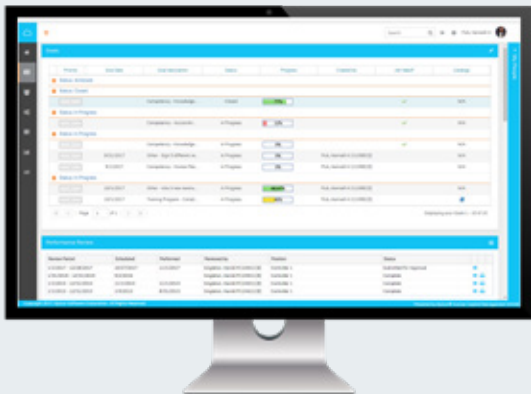
Absences

The impact and cost of employee absences to the organization can be very high, which presents an opportunity for driving out costs and demonstrating the return on investment (ROI) of HR programs. The absence-tracking features in Epicor HCM enable you to manage employee absences online to help control those costs.

Talent Management

Organizations are increasingly focused on retaining valuable employees through skills development, rewards, and employee satisfaction initiatives. Epicor HCM helps HR leaders define and leverage competency models that jumpstart talent management initiatives as part of a comprehensive HCM strategy. Functionality includes:

- Goal management
- Cascading goals
- Journaling
- Configurable appraisal documents
- Skills gap analysis
- Job Needs
- Competencies and certifications



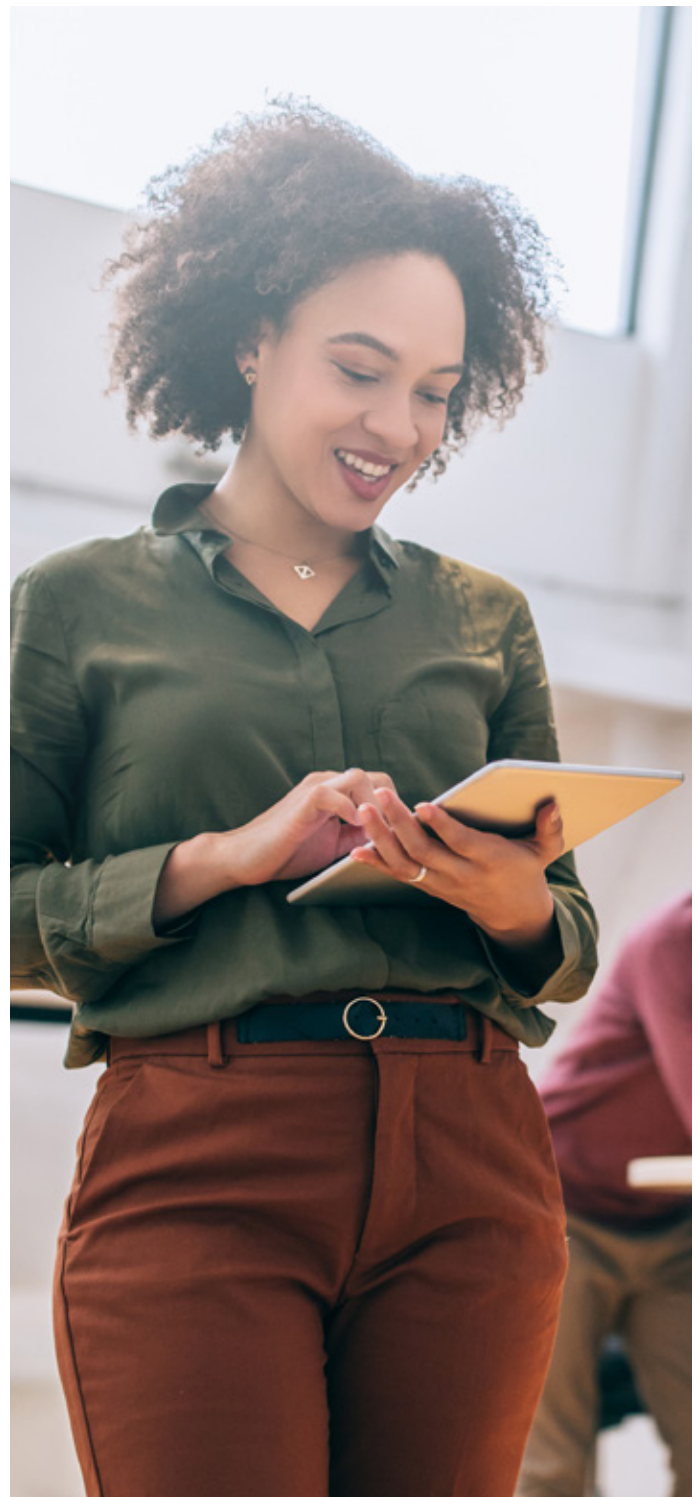
Performance Management—Align your organization from top to bottom on common goals that focus on achieving strategic objectives. Reduce the cost of tedious paper-based reviews with a 360-degree view of performance that encourages consistent feedback.

Performance Management

Performance management can be a powerful method to motivate employees, prioritize objectives, and focus organizational efforts on common strategic initiatives. With Epicor HCM, you can align corporate goals with employee performance while empowering managers to consistently monitor employee performance throughout the year. The 360-degree or traditional performance reviews facilitate the process of evaluating employees and reduce the cost of tedious paper-based appraisals.

Talent Assessment

Epicor HCM offers a highly visual and detailed method for exploring the talent potential of your employees. The Employee 9-Box Talent Matrix allows you to evaluate your employees in terms of current contribution to the organization and their potential, as mapped out in a matrix format. This 9-box matrix is an especially useful tool to quickly evaluate your organization's talent pool, track an employee's career trajectory, identify potential leaders, and determine top candidates for coaching or mentoring.



Compensation

Compensation expenses typically account for a significant portion of an organization's annual budget, so managing them optimally is vital. Proper planning and management of compensation strategies can help you retain the talent you need and help ensure your overall success. With Epicor HCM, you can manage all types of pay and an unlimited number of grades and ranges—even allowing for different grade scales at different locations within your organization.

Salary Planning and Administration

The Epicor HCM salary planning and modeling tools enable HR to create plans on a defined budget, which managers can use to model various salary distributions among their employees. Upon submission, HR can route plans through the proper channels. Once plans take effect, HR can create a single view of your compensation strategy for the executive team. Empower managers to directly request salary changes for their employees through Epicor HCM. Requests can be routed through the proper channels for approval, and use electronic signatures for documentation. Routed requests can even be conditional (e.g., if a change is more than 3%, it requires executive approval; if it is less than 3%, it only requires department head approval) and requests may be edited by the approving authorities during the process.

Training and Development

The Epicor HCM Training and Development module allows you to track a comprehensive training history on your employees so you gain a better understanding of the knowledge, skills, and abilities employees have added to their personal profiles, as well as any additional learning opportunities that may interest them. Encourage a culture of growth and opportunity among employees by empowering them to take control of their own career development.

Position Control

The Epicor HCM Position Control module lets you manage headcount and monitor funding allocations to better control the “people” budget. Whether it's creating a new position and submitting a request for approval or measuring resources against budgeted headcounts, Position Control allows HR professionals to refine the attributes of a position for better administration of open, filled, and new positions while maintaining tight control on costs.

Timesheets

Managing an employee's work hours or time off can be overlooked as an area with potential cost savings. Reduce data entry time by empowering employees to be responsible for their own accurate time reporting with the Epicor HCM Timesheet module. Managers can filter the time sheets by those submitted, not submitted, or waiting for approval to make the time-worked approval process more efficient. Afterwards, managers can send the time records to payroll electronically, which drives efficiency to the payroll process and reduces administrative costs. With integrated absence functionality, even the requested time off is added to the employee's timesheet to further support workforce planning and scheduling.

ADP Workforce Now Integration

Having a sound and accurate process to submit payroll to your ADP Workforce Now payroll solution is extremely helpful when meeting critical payroll deadlines. With the Epicor ADP Payroll Integration, you have the ability to set up employee pay groups, calculate and edit payable hours, and create a file pre-formatted and ready for submission to ADP.

Kinetic is integrated with the ADP payroll solution and can also be integrated to third party payroll providers. The Kinetic Payroll module is available as an optional module within Kinetic. The Payroll module can work with the Automated Clearing House (ACH) payment capability as well as the General Ledger (GL).

- Reduces the staff hours needed to process payroll
- Automatically creates file format ready for submission
- Improves productivity in processing payroll
- Helps to meet critical payroll deadlines



Training and Development—Allow employees to schedule and track training requirements with an easy-to-use calendar view.



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.

Contact Us Today: info@epicor.com | www.epicor.com

The contents of this document are for informational purposes only and are subject to change without notice. Epicor Software Corporation makes no guarantee, representations, or warranties with regard to the enclosed information and specifically disclaims, to the full extent of the law, any applicable implied warranties, such as fitness for a particular purpose, merchantability, satisfactory quality, or reasonable skill and care. This document and its contents, including the viewpoints, testimonials, dates, and functional content expressed herein are believed to be accurate as of its date of publication, September 24, 2021. Use of Epicor products and services are subject to a master customer or similar agreement. Usage of the solution(s) described in this document with other Epicor software or third-party products may require the purchase of licenses for such other products. Epicor and the Epicor logo are trademarks or registered trademarks of Epicor Software Corporation in the United States, and in certain other countries and/or the EU. Copyright © 2021 Epicor Software Corporation. All rights reserved.