

Epicor Human Capital Management Overview





Human Capital Management

Your business runs on human resources. So, run your human resources with the Epicor award winning Epicor® Human Capital Management (HCM) solutions. From recruiting and onboarding new talent to fostering careers through talent management programs, Epicor HCM helps you drive process improvements from the front line. The bottom line will only improve if you increase productivity by improving employee performance. You need the right tools to produce measurable results.

Epicor HCM is a comprehensive, configurable human resource information system (HRIS) that empowers users by automating your HR processes. It gives HR professionals the tools to track, manage, and analyze employee information. Managers can motivate employees while keeping them focused on the tasks that will connect their efforts to the company's strategic objectives. Employees can take ownership of their careers by managing goals, monitoring their performance expectations, and growing their competencies.

So, spend more time managing your talent and less time managing your data. Get the tools your business needs. Your success depends on it.

Epicor Human Capital Management

Manager Portal

- Access profiles of direct reports
 - View, update, and approve employee appraisals and goals
- Approve education and certifications

Employee Connect

- View and request time off
- View and manage benefit enrollment
- Access and sign company documents
 - Maintain competency profile
- View and update personal information
 - Enroll in training courses
 - Manage goals
 - Mobile enabled

Candidate Connect

- Candidate self service
- Search and apply online for open positions
- Create and maintain job history and skills profile
- Attach resume
- Complete interview questions

HCM Link

- Export data using templates
 - On demand or scheduled
- Review and audit exported information
- Interface with other systems, such as payroll, benefits carriers, and job boards
- Eliminate duplicate entry

Timesheets

- Track hours worked
- Integrated to absence tracking
- Submit and approve hours online
- Manage overtime rules, department, and project allocations

Position Control and Budgeting

- Manage headcount and FTEs
- Track employees working in multiple positions
- Manage funding sources

Training and Development

- Manage courses, sessions, costs, enrollment, and completion
- Integrated to goals to encourage completion
- Comprehensive training history

Core HR

- Global employee records
- Absence tracking
- Benefits administration
- Recruitment management
- Salary admin and planning
- Competency administration
- Reporting and analysis
- Configuration tools

Performance Management

- Goal Management
- Configurable appraisal documents
- 360 Reviews
- Employee self appraisal



Deployed your way

Epicor HCM provides the broadest flexibility, enabling you to implement your HCM solution in the most appropriate way for your business. Available as on-demand software as a service (SaaS), hosted, or on-premise license, Epicor HCM can be deployed according to your requirements without compromising functionality.

Usability

Epicor HCM's intuitive user interface allows users to easily navigate HR business processes. Whether it's HR or a manager submitting an update to the employee information, Epicor HCM applies workflow and data integrity rules to manage the data flow, obtain necessary approvals, and alert users when a process needs their attention.

Epicor HCM's unique home page is the launch pad for everything users regularly do in the system. HR department users and administrators, business managers, and employees can personalize their home pages so that all their data and tasks are right there. With Epicor HCM's home page, everyone can securely get to their assigned tasks quickly and easily, improving overall efficiency.

For executives, key HR metrics can be displayed on the home page providing insight into business trends; HR can link to commonly used tasks, reports, and to-dos; and managers can open any personnel task they're allowed to perform by clicking on a person summary from a list of their people.

Complete HCM functionality

Managing your human resources with Epicor HCM goes beyond basic HR functions. You are managing strategic HR initiatives that influence the future of your organization.

The foundation of Epicor HCM is strong core HR functionality that is key to integrated business processing. Users can spend less time entering and updating employee information and more time managing the workforce. The CoreHR functionality includes:

- ▶ Comprehensive employee data
- ▶ Absence tracking
- ▶ Benefits administration
- ▶ Salary planning and compensation administration
- ▶ Health and safety administration

- ▶ Competency management
- ▶ Candidate tracking and recruitment management
- ▶ Advanced configuration tools to tailor your system to your needs
- ▶ Reporting and analytics

Epicor HCM comes with more than 150 standard reports and flexible reporting tools that enable you to turn transactions and data into knowledge and wisdom for better decision making.

You need a system that works for you. We designed Epicor HCM to meet your needs; but, because no two organizations are alike, we've included incredibly easy-to-use tailoring tools in Epicor HCM so you can add fields to the system, change the look and feel of the pages, and create new forms to meet the unique needs of your business.

International

Epicor HCM is available via Web-based access virtually worldwide, automatically configuring data fields in supported countries to reflect the appropriate format based on an employee location.

Variable grades, different benefit and absence plans, multiple currencies, additional compensation types, and potentially different data tracking and reporting requirements can be accommodated. Epicor HCM enables employees in supported countries 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.

Recruitment management

Epicor HCM gives you the tools you need to 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 connect

Expand your recruiting capabilities with Candidate Connect by enabling applicants to apply online. Pre-qualify individuals against open requisitions and job requirements helping you shorten the recruiting process and control costs.

Speed up the hiring process

Searching for qualified applicants can be time consuming. Epicor HCM provides powerful tools that help match qualified applicants to open positions, reducing the time you spend filtering through resumes. When a requisition closes, the system can automatically notify the other candidates that when you've filled the position. Since Epicor HCM recruitment management is part of your complete system, you eliminate duplicate data entry. Epicor HCM seamlessly converts candidate data into employee data when you hire a candidate.

Effective onboarding is essential

An effective onboarding program is critical to quickly bring new hires up to speed in an organization. Epicor HCM can play an important part in the readiness process by publishing new hire forms in one location, automating the tasks new hires must complete, read and electronically sign company documents such as the handbook and benefit enrollment, and manage these tasks to completion with workflows and alerts.

Employees can use direct access to read and electronically sign important documents, while HR can track who has or has not signed.

Key features

- ▶ Requisition management
- ▶ Job opening cost tracking
- ▶ Evaluation tracking
- ▶ Drug test tracking
- ▶ Seamless applicant-to-employee transition
- ▶ Compliance reporting
- ▶ Automated correspondence

Benefit administration

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

Online open enrollment

Empower your employees to make cost-effective decisions with online open enrollment. With the optional Employee Connect module, employees can make their own benefit selections and immediately see the financial impact of those changes, on themselves and on the company. By streamlining the enrollment and moving to a paperless process, your HR department saves time and time is money for your organization!

Life events

People get married, have babies, and get divorced. When life events make an employee eligible for changing their benefits, Epicor HCM automatically sets up an open enrollment group for those individuals to change their benefit elections. You can determine which benefits they can change, so your organization still maintains control.

Reporting

Most employees don't realize the value of their benefits. With our standard benefits statement, you can help them understand and appreciate your company's investment. Other Epicor HCM standard reports cover all areas from plan utilization and cost analysis to census reporting and billing reconciliation.

- ▶ Unlimited benefit plans and options
- ▶ New hire benefit auto enrollment
- ▶ Electronic signatures for benefit changes
- ▶ Rules and eligibility criteria
- ▶ Employee enrollment maintenance
- ▶ Premium payment and employee contribution tracking
- ▶ Easy plan set-up
- ▶ Benefit cost and usage tracking
- ▶ COBRA administration
- ▶ Alerts on any field
- ▶ Powerful reporting and analytics

Absence tracking

The impact and cost of employee absences to your organization is astounding. The absence tracking features in Epicor HCM enable you to manage employee absences online to help control those costs.

Using the absence tracking features in Epicor HCM, you can automate your time-off process with multiple types of plans and accrual rates. Employees can view their accruals online and request time-off using the Employee Connect module. Managers can view a graphical calendar of scheduled and used time off for their staff, and you can use that data to find trends in absences and help manage the costs associated with absenteeism.

Compliance

Failing to comply with government regulations regarding employee leave can lead to serious consequences for your organization. You can use Epicor HCM to help administer leaves of absence for your employees and prevent unnecessary violations.

Key features

- ▶ Administer all absence plans
- ▶ Manage accruals
- ▶ Manage leaves of absence
- ▶ Route time-off requests for approval
- ▶ Analyze absence patterns
- ▶ Use absence forecasting features to reduce negative balances

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 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

Epicor HCM's 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.

Salary administration

Streamline your salary change requests by empowering managers to request salary changes for their employees through Epicor HCM. Requests can be routed through your defined approval levels, 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 you can even allow requests to be edited by the approving authorities during the process.

Key features

- ▶ Track any type of pay
- ▶ Manage an unlimited number of grades and scales
- ▶ Design scales for different locations
- ▶ Generate budgets
- ▶ Empower managers to model salary plans
- ▶ Electronically route salary changes, allowing edits
- ▶ Create total compensation reports
- ▶ Design a performance-based compensation package
- ▶ View benefit costs
- ▶ View snapshots of salary changes, and budget amounts

Performance management

Performance management is critical to the success of your talent management 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 reviews.

Focused feedback

With Epicor HCM's performance management features, HR can create meaningful performance appraisals and manage the performance process by using competencies on the appraisals that are tied directly to the job or position the employee holds.

360° reviews

Using a 360-degree review, you can obtain a more complete picture of every employee's performance by including feedback from other people in your organization. All parties participating in the review (manager, employee, coworkers) can complete questions online, eliminating data entry for HR and speeding up the entire review process. Participants can also view information such as past reviews, training and development, disciplinary history, and certifications. HR chooses who can see past reviews, meaning the process is secure. When a review is complete, HR can route it electronically to anyone needing to approve or be notified of the review.

Gain momentum with goal management

With Epicor HCM Performance Management and Employee Connect, your workforce is armed with the tools to execute on the organization's strategic initiatives. Help drive productivity by ensuring that resources are focused on key tasks and that they understand how their work directly affects the outcomes of the entire organization when you create corporate goals and link individual goals to these efforts. Managers and employee can work together to create, manage, and measure goals and performance objectives online.

Journaling

When a manager is working on an annual review, documentation regarding an employee's performance throughout the entire year is very helpful. Epicor HCM provides journaling for managers, employees, and HR to track month-to-month, week-to-week, or even day-to-day activities. Empower your managers to track positive feedback and growth opportunities using this great tool that puts the information right where it's needed.

Key features

- ▶ Online, paperless program
- ▶ Traditional or 360-degree reviews
- ▶ Performance history
- ▶ Standard review questions
- ▶ Create department-specific questions
- ▶ Mass-generate reviews
- ▶ System alerts of impending reviews
- ▶ Cascading goals
- ▶ Journaling

Training and development

Developing the skills and abilities of your workforce means reducing turnover costs, improving retention rates, and increasing productivity across the board. With Epicor HCM's Training and Development module, you'll grow the capabilities of your future leaders by making ongoing training readily available. This tool allows employees to easily see which classes are required and available, where and when they are offered, and allows employees to register for a class and obtain approval from their manager—all electronically.

Grow, strengthen and prepare for the future

Epicor HCM's Training and Development module allows you to track a comprehensive training history on your employees so you'll have 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. The future is now and you need to make sure your employees are ready.

Position control and budgeting

The Epicor HCM Position Control and Budgeting 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 and Budgeting 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 Epicor HCM's Timesheet module. Managers can filter the time sheets by those submitted, not submitted, or waiting for approval, making the time worked approval process more efficient. Then, send the time records to payroll electronically driving efficiency to the payroll process and reducing 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.

HCM link

Connect your processes and protect your data integrity by using Epicor HCM Link to create and manage interface files from the Epicor HCM database. Epicor HCM Link is an interface tool that allows data to be exported from Epicor HCM into other systems. With HCM Link, you can easily streamline tasks by transferring information via an interface from Epicor HCM to your payroll provider, your benefit vendors, or other systems.

Reporting and analytics

Powerful reporting and analytical features separate Epicor HCM from other HR systems on the market. The Epicor HCM system empowers you with the tools to analyze the greatest asset of your organization from every angle.

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 up to date on compliance reporting, compare benefit programs, and much more. Epicor HCM provides a complete picture of your company's workforce for better strategic planning.

Standard Reports

The standard reports in Epicor HCM are available to every user of the system for all data in the system they have permission to see. Whether an Employee Connect user needs a benefit statement, a manager needs to review open requisitions, or HR needs a complex EEO analysis—Epicor HCM provides standard reports for all of your reporting needs.

Affordable Care Act Reports

New reports were added to HCM Version 5.9 to assist users in complying with Affordable Care Act reporting requirements. The 1095-C report mimics government's form and shows the information needed to generate benefits offer records. The 1094-C report assists in gathering information needed by employers to complete the 1094-C form.

Microsoft® Report Builder

For custom reporting, Epicor HCM uses Microsoft Report Builder, an ad hoc report builder that is both familiar and easy to use

with a look and feel consistent with that of Microsoft Office. Report Builder makes it easy to create custom reports, regardless of database knowledge, to generate the reports they need. Users can locate data and create new text, fields, and calculations based on that data. They can then format, preview, and print professional looking reports.

Analytics

Epicor HCM incorporates analysis features for data retrieval and analytical reporting. Analytics empower you to quickly find, view, and manipulate the data in your Epicor HCM system. With Microsoft Excel-style pivot tables, Epicor HCM's analysis services provide a high-level view of your business data for reporting, online analytical processing, data mining, and retrieval of key performance indicator scorecards.

More than 150 Standard Reports, including:

- ▶ Form 1094-C/1095-C (Affordable Care Act)
- ▶ 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

US Compliance Reporting

- ▶ Affordable Care Act
- ▶ AAP
- ▶ VETS-100
- ▶ FMLA
- ▶ OSHA
- ▶ COBRA
- ▶ EEO

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 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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