



# Epicor Human Capital Management

A proactive approach to inspiring talent in  
your business.



# Human Capital Management

Today's economy demands a more proactive, strategic role for the HR department. Today's managers and employees demand direct access to human resource (HR) systems and information. Epicor Human Capital Management (HCM), delivers this and more, helping you better manage your globally dispersed workforce, improve human resource processes, and make HR an integral part of your strategic planning.

Epicor HCM is an award winning, intuitive, functional, and adaptable HCM solution. We've defined the next generation of HCM solutions and backed it with the best service in the industry to provide an unparalleled user experience. With Epicor HCM you have the ideal tool to manage your most valuable resource—your workforce—to help ensure your organization's success.

Epicor HCM automates everything related to HR in a single software system, enabling you to track, manage, and analyze all data for your employees, from application to retirement. Through automated workflow, you improve your efficiency. With powerful reporting and analytical tools, you gain a complete picture of your company's workforce for better strategic planning. With seamless integration to your Epicor or alternative solution, you gain a complete view of your employees.



- ▶ Core HR
- ▶ Payroll (US)\*
- ▶ Recruitment
- ▶ Reporting & Analytics
- ▶ Talent Management
- ▶ Direct Access
- ▶ Mobile HCM

\* Available in the US only—please check with your Epicor office for local solutions.

## Usability

Epicor HCM offers one of the most intuitive user interfaces on the market, which enables you to expand use and adoption throughout the organization. Using tabs and drop-down menus, you can instantly navigate anywhere in Epicor HCM; you can launch new activities worry-free with the Epicor HCM auto-save feature; and if you miss a field in a task, Epicor HCM notifies you.

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

On their home pages, executives can immediately find the most critical analytics that drive your business; 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.



*Users have full control over their individual home page enabling them to include the elements that matter to them most, e.g., tasks lists, favorites, workflow assignments, open tasks, and key reports. From the home page in Epicor HCM, you can jump to any other part of the system or any task.*

## Complete HCM Functionality

The HR department adds value to the organization when you can provide assistance on decision making and business initiatives. Access to accurate information is essential. Our

human capital management software maintains all your employee-related data in a single database—a true HR system of record that enables you to support your organization's strategic initiatives.

A system is only as good as its output. Epicor HCM comes with over 250 standard reports and flexible reporting tools that enable you to create custom reports. You no longer have to spend time consolidating data from multiple systems to get the reports you need.

You need a system that works for you. We designed Epicor HCM to meet all of your needs. 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, even create new forms.



*Epicor HCM offers end-to-end HR functionality with an interface that maintains all employee-related data in one area, provides strategic level reporting, and captures the full cycle of information on every resource in your organization.*

## Global

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. 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 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.

Country Specific Functionality and language translation are delivered for select countries outside of the United States

## 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

With Candidate Connect, applicants can view your job postings and read about your company online. They can complete a profile with personal information and competencies, attach a resume and work samples, update their resume and work samples at any time, and apply for multiple positions. With knock-out questions, you can refine the applicant selection process with questions specific to departments or positions. These questions can help HR and managers find the right candidate faster.

### Speed Up the Hiring Process

Searching for qualified applicants takes time. 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 automatically notifies all other candidates when you've filled the position. Because Epicor HCM staffing management is part of your complete system, you eliminate duplicate data entry. Epicor HCM seamlessly converts applicant data into employee data when you hire a candidate.



Use *Qualification Match* to quickly identify potential candidates for open positions.

## Onboarding Process

HR can publish all new-hire forms in one location, automate the new-hire benefits selection process, and alert new employees of important dates. To help in the onboarding process, you can publish and manage employee forms in Epicor HCM. Employees can use the self-service features to read and electronically sign these important documents, while HR can track who has or has not signed and manage the entire process with Onboarding Checklists.

### Key Features

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

## Benefits

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.

### 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. Your HR department saves hours of data entry while your organization saves money as a whole. Digital signatures streamline the entire process and make it truly paperless!

### Life Events

People get married, have babies, 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.

## Key Features

- ▶ Unlimited benefit plans and options
- ▶ Electronic signatures for benefit changes
- ▶ Easy plan set-up
- ▶ Rules and eligibility criteria
- ▶ Employee enrollment maintenance
- ▶ Alerts on any field
- ▶ Premium payment and employee contribution tracking
- ▶ Benefit cost and usage tracking
- ▶ Separations and continuation of coverage
- ▶ Direct access
- ▶ Powerful reporting and analytics



*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.*

## Absence

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.

## Absence Tracking

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 upcoming time-off and past time-off for their staff, and you can use that data to find trends in absences and help manage the costs associated with absenteeism.



*Epicor HCM helps you manage employee absences online for better cost control, employee direct access, and government regulation compliance*

## 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 a leave of absence for your employees and prevent unnecessary violations.

## Key Features

- ▶ Administer all absence plans
- ▶ Manage accruals
- ▶ Manage required documents
- ▶ Route time-off requests
- ▶ 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

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.

### Salary Administration

Streamline your salary change requests by empowering managers to request salary changes for their employees through Epicor HCM Manager direct access. 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.

### Key Features

- ▶ Track any type of pay
- ▶ Manage an unlimited number of grades and scales
- ▶ Design scales for geographical differences
- ▶ 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 actual benefit costs
- ▶ View snapshots of salary changes, relationships, and over/under budget amounts

## Performance Management

Performance management is critical to the success of your organization. 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.

### Core Performance Management

With Epicor HCM performance management features, HR can create a core set of questions to assign to the entire organization or to a specific department, location, or job. Once HR establishes those questions, Epicor HCM creates a unique online performance review for each employee based on those criteria.

### 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 appraisals, training and development, disciplinary history, and competencies. Because HR chooses who can see past reviews, the process is secure. When an appraisal is complete, HR can route it electronically to anyone needing to approve or be notified of the review.



*Reduce the cost of tedious paper-based reviews with a 360-degree view of performance that encourages consistent monitoring and aligns corporate objectives with the goals of each department and individual.*

### Cascading Goals

Although employee performance impacts the entire organization, corporate goals drive momentum for individuals. Using Epicor HCM, you can share corporate goals with your entire team and assign portions of those goals to all employees or certain jobs. You can include those goals in performance reviews and rate them accordingly. By improving goal alignment in your organization, you can boost employee morale and measure each individual's contribution to your organization's success.

### 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 both positive and negative information using this great tool that puts the information right where it's needed—in your HR system.

### 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



## 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 for improved 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.

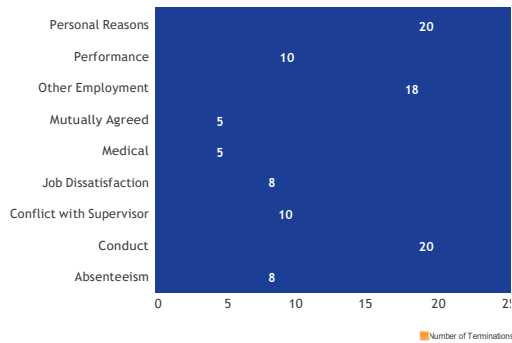
### Standard Reports

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 create a requisition for an open job, or HR needs a complex EEO analysis—Epicor HCM provides standard reports for all of your reporting needs.

### Microsoft Report Builder

For custom reporting, Epicor HCM uses Microsoft Report Builder, an ad hoc reporting tool that is both familiar and easy to use with an Office-like look and feel. Report Builder makes it easy to create custom reports and enables any user, 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.

Termination Reasons by Department  
Manufacturing



## 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 analysis services provide a high-level view of your business data for reporting, online analytical processing (OLAP), data mining, and retrieval of key performance indicator (KPI) scorecards.

### Over 250 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
- ▶ US Compliance Reporting



*Epicor HCM includes over 250 pre-built reports that follow the permission and security structure within the application so users are empowered with important analytical tools and ease of use.*

## 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 the Epicor HCM 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

The Epicor HCM 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 the Epicor HCM 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.

## Mobile HCM

Today's workforce is on the move so you need tools that will help keep up with managers and employees. The Epicor HCM Mobile Connect allows both Managers and Employees access to frequently used self-service tasks from their mobile device.

### For the manager

Good managers know how important it is to be responsive to their direct reports. Now, they can respond even faster from their iPad, iPhone or Android devices. Whether they need to verify an employee's time off balance, approve requests for time off, find employee data and emergency contact information or initiate employee changes, it's all at their fingertips.

### For the employee

Employees want information readily available. HR wants to empower them to keep their information up to date. Extend your self-service reach by allowing employees direct access to update their personal data such as address and contact information, view their insurance information, even search the company directory. And now, they can view their time off balances and submit a request for time off when it's convenient for them. Need a reminder? With the mobile To-Do List, employees can add, edit or complete list items, so they won't forget those important things that need to get done.

All these features are enabled with "click to call" so keeping in touch while on the go is easy. You simply deploy a portal and log in through the device's browser. HR doesn't have to support various versions of device applications. No application install is required. Use the Configure Mobile Utility task to personalize your mobile portal, including adding your company image

and customizing the menu layout. You can also use this task to control employee access to the mobile portal. So, whether you provide mobile devices or support a bring-your-own-device policy, your managers and employees can complete tasks, view information and access data conveniently.



Employees stay connected with HCM Mobile Connect.

## US Payroll

Epicor Payroll is an add-on module for our ERP customers that handles the processing of US employee paychecks and provides the necessary company and US government reporting. With Epicor Payroll, there is no longer any need to have your payroll done with an outside service, when it is so easy to do yourself.

### Employees

Set up employees as hourly or salaried. Pay employees weekly, biweekly, semimonthly, or monthly.

### Departments/Shifts

Establish home department and shift IDs for each employee.

### Tax Tables

Set up federal, FICA, state, local, and other tax deductions.

### Pay Types

Maintain regular, overtime, double time, holiday, vacation and sick pay types, as well as unlimited user-defined pay types.

### Checks

Preview, print on standard check forms, or reprint if necessary.

### User-Defined Fields and Memos

Enter and track fields and unlimited memos for each employee.

### Check History

Keep check history indefinitely to help audit unemployment or other claims.

### Voluntary Deduction

Define any number of voluntary deductions.

### Payroll Taxes

Exclude certain deductions, including health and welfare plans and retirement.

### Auto-Pay

Pay all salaried and/or hourly employees with a few keystrokes.

### General Ledger Interface

General ledger entries are automatically created through the payroll process. Departments/Shifts

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