



EPICOR Epicor Software Corporation

EPICOR

Company Facts

Overview

- Location – Austin, Texas
- Industry – Software
- Website – www.epicor.com

Success Highlights

Challenges

- Needed greater efficiency in storage, access, and retrieval of employee personnel documents, and improved compliance with data and privacy requirements worldwide.

Solution

- Epicor® Enterprise Content Management (DocStar®)

Benefits

- Simpler, faster access to employee personnel documents, allowing human resources professionals to devote time to other, more value-added activities.
- Enforcement of role-based security access for authorized users.
- Streamlined compliance with country-specific retention, privacy, and compliance guidelines.

Epicor Enterprise Content Management Offers Simplified HR Document Management on a Global Scale

Employee records now easier to securely store, retrieve, and manage in compliance with country-specific data and privacy regulations

For nearly 50 years, Epicor Software Corporation has specialized in helping its customers grow their businesses, expand their capabilities, increase their productivity, and improve efficiencies. A leader in enterprise resource planning for medium-sized businesses, Epicor serves as a trusted partner for thousands of companies worldwide across key industries such as manufacturing, distribution, and retail. Through its innovative services and deep industry expertise, Epicor is creating a world of better business for its customers, building in their unique business processes and operational requirements into every one of its solutions – in the cloud or on-premises.

Capitalizing on the HR Document Management Opportunity

Epicor has nearly 3,900 employees dispersed across 30 countries worldwide. Between an employee's start and end date with the company, there are numerous records related to hiring, onboarding, performance, benefits, and data changes that all must be maintained securely. The vast majority of these files are paper-based; long-tenured employees may have multiple file folders with as many as 40 documents in each file. All total, Epicor's human resources documents comprised 10 storage cabinets in its HR file room for the United States and Canada alone.

“The Epicor Enterprise Content Management tool is very feature-rich. Sometimes a document is requested that has sensitive information that you may not want to share. You can pull up the document, choose what you want to redact, and then send it out in a minute. It saves a lot of time.”

—Debra Ingram, SPHR, Director of HR Operations

Epicor had been searching for an optimal solution to digitize these files for more efficient storage, secure access, and retrieval as well as more secure compliance with document retention requirements worldwide. A key requirement was integration with its UltiPro cloud-based system for human capital management (HCM).

When the Epicor HR team evaluated potential document management solutions, they realized many came packaged with extraneous features that Epicor didn't need. When Epicor acquired enterprise content management provider DocStar in 2017, it gained access to a solution that was a perfect fit.



Easy Document Access-and-Retrieval

Epicor went live with the Epicor ECM (DocStar) solution in September 2020 and quickly began uploading employment offer letters. The letters are an essential starting point for HR recordkeeping as they include information that outlines contractual obligations between Epicor and its employees.

The process of migrating these documents into the Epicor ECM system has been simple. Epicor HR representatives worldwide scanned and uploaded offer letters into the system; from there, they opened the document in a workflow, saved the document under an employee's number, last name, full name, or any other specifics.

Fielding requests for information is faster and easier than ever before. Previously with hard copy documents, if an employee requested a file, an authorized human resources representative would have to travel to the HR storage area, find the appropriate document, scan and send the document, and save a copy of the communication. Now, documents can be emailed directly from the Epicor ECM system to the employee in a password-protected zip file.

Based on the employee data from UltiPro, including appropriate fields such as Name, ID, Hire Date, Status, Location, and Country, the indexing process for employee documents is very simple and ensures that the document is indexed to those UltiPro values, eliminating data entry for each field. The UltiPro employee data provides a high level of data validation and integrity for each record added to the system. This contributes to more accurate and efficient document search results across all employee records.

“The Epicor ECM tool is very feature-rich. Sometimes a document is requested that has sensitive information that you may not want to share. You can pull up the document, choose what you want to redact, and then send it out in a minute. It saves a lot of time,” said Debra Ingram, SPHR, Director of HR Operations for Epicor.

Improved Worldwide Compliance

Individual countries and the European Union have different rules for HR document retention, privacy, and other compliance guidelines. To support these global document management requirements, the Epicor ECM solution was provisioned as multiple Software-as-a-Service sites; one based in the U.S., one in the Ukraine/Russia area, and one in China. Epicor HR personnel have access to one or more of these SaaS sites based on their security profiles and information access needs.

Beyond helping adhere to compliance requirements, the Epicor ECM solution also assists with creating uniformity in indexing documents as there are variances in naming conventions for performance appraisals and other HR documents worldwide.

“Having that uniformity across different geographies with the flexibility to add country-specific elements is a big win,” Ingram said.

Looking Ahead

Business constraints due to the COVID-19 pandemic limited scanning and upload of documentation to the Epicor ECM repository as many offices remain closed. “Even though we’re just getting started, our success with the Epicor ECM solution has made us realize that we should have done this sooner, as COVID has underscored the need for digitization,” Ingram said. “Once we have everything uploaded, it will make life so much easier.”

“The demands in HR are constant and evolving,” she continued. “We don’t always know what’s going to be coming next week, next month, or next year. So, the more we can lessen the administrative effort required, the better positioned we will be to adapt and respond to the needs of the business.”

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.

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