

ARM vs Standard Requisitions in Epicor

Sometimes the question is raised; “So, what does ARM do that standard Epicor doesn’t?” The answer to that can be both simple and complex...

In short, ARM provides additional control of (and visibility to) the procurement process, which extend beyond those delivered in the core Epicor solution. When considering the differences between ARM and ‘standard functionality’ (Requisitions/PO’s in Epicor 9/Epicor ERP or PO’s in Epicor Enterprise 7.4) we refer to the procurement process within the organization in a general sense. That is, where the initiating process is always a request for something (inventory, for a job/project, Capex, Opex purposes, etc.). The request then flows through one or more approval chains based on the context of the request.

The below illustrates key areas where ARM will be of value above and beyond the standard capabilities of the Epicor platform.

Process Objectives and Solution History

Epicor 9 and Epicor ERP are excellent solutions for manufacturers and distributors. Their standard capabilities are highly functional, particularly in the context of manufacturing operation. Inventory-centric purchasing is predominantly driven by automated calculations like MRP. Typically however, the creation and execution of orders are entrusted to a relatively small number of people. As a result, complex approval mechanisms are not a strength of the solution. Epicor Enterprise also has limited capability with regards to ‘general’ purchasing, with no real approval workflow concepts incorporated into the solution

Advanced Requisition Management starts with the premise that (at any given time), anyone in the organization may need to purchase something. That user may not be familiar with Epicor. ARM broadens the scope of the requisitioning process by allowing anyone in the company to request goods/services easily and at a low cost. ARM manages complex approval flows as simply as possible and delivers high-visibility to users both inside and outside of the approval chain. Like standard Epicor, ARM is great for ad-hoc job and inventory purchasing with simple approval flows, but ARM also aims to easily facilitate all other purchasing requests and approvals across the enterprise and end-user community.

User Interface/Experience

End-users are only likely to embrace a system when it is simple to use and makes their jobs easier. The Epicor client application (as powerful as it may be) is not something most users interact with on a regular basis. The typical user often does not know which supplier(s) the organization uses to source items, goods and services.

ARM uses a straight-forward, uncluttered user interface to make the entering of a requisition as simple as possible, yet still provides powerful requisition search & retrieval capabilities. Users can create new requisitions easily or recall one they have already done. ‘Templates’ can be created to facilitate repeated commonly requested items, goods and services. The system defaults most of the required data and can generate requisitions with minimum effort on the users behalf.

Unlike standard Epicor, users can requisition items for multiple locations and even mix purchase and transfer requests all within the same requisition.

When entering a purchase request, ARM checks to see that sufficient budget is available to cater for the current line. This valuable feature can be used to merely warn a requestor that their purchase will exceed budget, or block the line from being requisitioned entirely.

Catalogue Metaphor

The ARM Catalogue allows users to very easily search for approved suppliers, goods and services. It can publish inventory Parts/Items from Epicor if that module is in use, as well as provide a means of storing commonly purchased “non-inventory” items in addition to or in place of Inventory.

Supplier Integration

The Catalogue is a great way of making it easy for users to find what they need to requisition. Inventory Parts published through to the Catalogue come into ARM via the built-in integration layer, and non-inventory Catalogue Items can be either manually entered through ARM or imported from a defined spreadsheet format.

Punch-out Functionality

The ARM Supplier Integration Module bridges ARM’s requisition entry screen to a supported webstore ordering screen. The ARM user can “punch out” to the supplier’s website, search and create a shopping basket and check-out as normal. The contents of the cart are then sent back to ARM where they appear as requisition lines. These lines are then subject to the ARM approval process.

Requisition Import

The ARM Supplier Integration Module includes the ability to import a requisition directly from an Excel spreadsheet. The lines created are validated as usual. Once complete the user can review or amend the resulting requisition before submitting it for approval.

Multi-Dimensional Approvals

ARM approval workflows are initiated at the line-level, not the requisition/PO header level. ARM allows you to define multiple, multi-layered approval “trees” based on the GL Account the line is for, the Location it is for, and/or the type of Part/Item, good or service that line represents. Approval roles can be delegated to allow for planned or unexpected approver availability.

Security & Permissions

Strong security features can very finely determine a variety of processing controls specific to requisitions, transfers and receiving functions.

End User Licensing & Deployment

ARM’s licensing is independent of and (per user) typically considerably lower than that of Epicor if an organization wants to implement stronger controls over their procurement processes. The application is natively web browser-based so there are no end-user deployment costs.



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