ERP SYSTEM ASSESSMENT

The JAMIS Advisory Services team offers an ERP System Assessment to organizations looking to identify potential improvement opportunities including product configuration, usage, processing, reporting, and system management. In addition, our professionals can help you identify any gaps or areas for improvement that can potentially lead to improved data integrity, streamlined processes, and compliance readiness.

The JAMIS ERP System Assessment will provide you with an industry expert who will methodically examine your system with your end-users to:

- Identify what is and isn't working for your users and your organization
- Create a list of recommendations and changes that will address your issues and needs
- Review and prioritize the recommendations with your organization
- Create a product roadmap for your company describing the scope and schedule of implementing the desired changes

In addition, you may want to consider this program if:

- You're not sure if you are using the system correctly, or want to validate that you're using recommended practices
- Your month-end closing process is taking longer than it should
- Your Org structure no longer adequately supports the company's business requirements
- Your Accounts, Cost Elements, or other fields no longer provide the details your decision-makers need to run your organization

DESCRIPTION OF SERVICES

Phase 1: System Assessment

JAMIS will provide a comprehensive assessment of the following:

#	SYSTEM FUNCTION	BUSINESS PROCESS	BUSINESS WORKFLOWS TO REVIEW
1	Processing	Labor Processing	Review time entry, approvals, corrections, labor posting, and payroll generation processes
2	Processing	Expense Processing	Review expense entry, approval, and AP posting process
3	Processing	Subcontract Processing	Review Subcontracting processing, including agreement creation, labor entry, approvals, and posting
4	Processing	Invoice Processing	Review Invoicing process, including creating and approving invoices with labor, expenses, subcontractor costs, ODCs
5	Processing	AP Processing	Review AP processing, including payments to vendors, employee expenses, subcontractor bills, and Purchases
6	Processing	Revenue Processing	Review revenue processing and posting
7	Processing	GL Processing	Review journal entry process, including auto-revering entries, recurring entries, and intercompany transactions
8	Processing	Allocation Processing	Review indirect cost allocation process and posting
9	Reporting	Project Status Reporting	Run and review PSR to view project revenue and cost
10	Reporting	Financial Reporting	Run and review Trial Balance, Income Statement, Balance Sheet, and Statement of Cash Flows
11	Reporting	Other Reporting	Run and review other critical reports, inquires, and dashboards in use
12	System Configuration	GL Management	Review financial system setup, multi-entity, and multi-currency configuration
13	System Configuration	Contract Management	Review contract and subcontract setup and management
14	System Configuration	People Management	Review employee setup, project assignment process, and HR process
15	System Configuration	System Management	Review user management and security roles

Phase 2: Recommendations

Once we have completed Phase I and understand the current issues and needs, JAMIS will create a document describing the recommendations needed to address any issues found or changes needed to support your organization. We will then review the recommendations with you and assign priorities based on your needs. Once finalized, JAMIS will create a JAMIS Prime System Roadmap for you that will describe the recommended changes to improve the usage, adoption, and organizational utility of the system.

Phase 3: Implementation

This phase may be conducted by a JAMIS consultant, or by your own organization's staff, or by a combination of the two based on the preferences of your organization.

Estimated LOE

The estimated Level of Effort for this review is approximately 8-16 hours of JAMIS Consultant time (excluding implementation).

Contact us today: services@jamis.com

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