



## JAMIS Prime System Assessment

For organizations seeking to  
maximize their investment in  
JAMIS Prime ERP

## JAMIS Prime System Assessment

JAMIS offers a JAMIS Prime System Assessment to identify potential improvement opportunities including product configuration, usage, processing, reporting, and system management. In addition, we can help your organization identify and avoid issues that can potentially lead to data, performance, or compliance issues.

**The JAMIS System Assessment will provide you with a JAMIS Prime system expert who will methodically examine your system with your end-users to:**

1. Identify what is and isn't working for your users and your organization
2. Create a list of recommendations and changes that will address your issues and needs
3. Review and prioritize the recommendations with your organization
4. Create a JAMIS Prime 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
- Your Dashboards are not providing the KPIs, business metrics, or actionable information needed to benefit your organization
- Your approval workflows do not adequately support your business processes
- You are on an older version of Prime, or have not implemented some of the new features in newer releases, or are not using modules that may benefit your organization



## Description of Services

The JAMIS Prime System Assessment consists of three phases:

### 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
		Expense Processing	Review expense entry, approval, and AP posting process
		Subcontract Processing	Review Subcontracting processing, including agreement creation, labor entry, approvals, and posting
		Invoice Processing	Review Invoicing process, including creating and approving invoices with labor, expenses, subcontractor costs, ODCs
		AP Processing	Review AP processing, including payments to vendors, employee expenses, subcontractor bills, and Purchases
		Revenue Processing	Review revenue processing and posting
		GL Processing	Review journal entry process, including auto-reversing entries, recurring entries, and intercompany transactions
		Allocation Processing	Review indirect cost allocation process and posting
2	Reporting	Project Status Reporting	Run and review PSR to view project revenue and cost
		Financial Reporting	Run and review Trial Balance, Income Statement, Balance Sheet, and Statement of Cash Flows
		Other Reporting	Run and review other critical reports, inquiries, and dashboards in use
3	System Configuration	GL Management	Review financial system setup, multi-entity, and multi-currency configuration
		Contract Management	Review contract and subcontract setup and management
		People Management	Review employee setup, project assignment process, and HR process
		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).



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