Epicor® Enterprise
Resource Planning
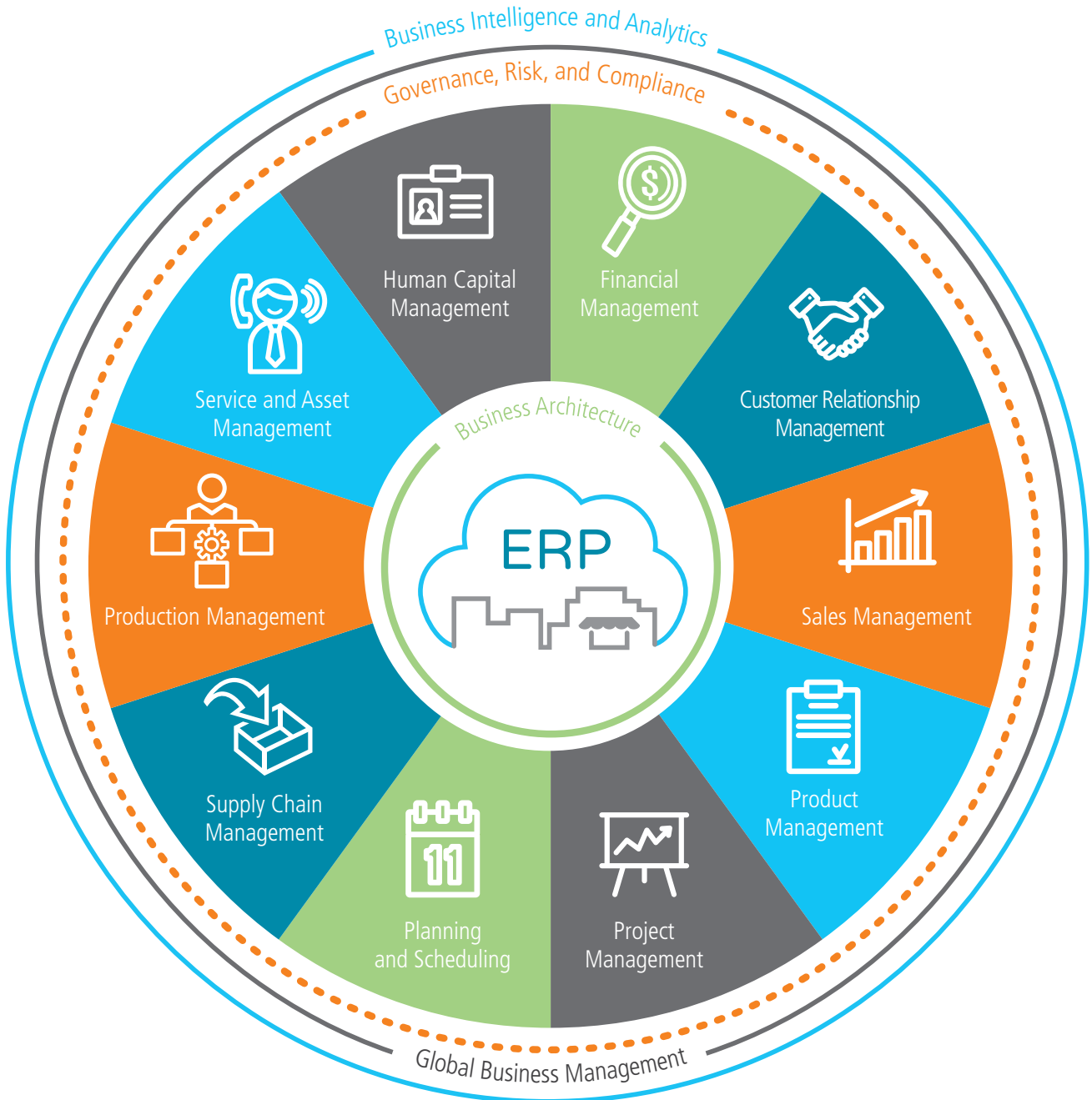
Project Management

EPICOR.

Epicor ERP Diagram

Business Intelligence and Analytics

Governance, Risk, and Compliance

Human Capital Management

Financial Management

Service and Asset Management

Customer Relationship Management

Business Architecture

ERP

Production Management

Sales Management

Supply Chain Management

Product Management

Planning and Scheduling

Project Management

Global Business Management

Project Management

- ▶ Project Planning and Analysis
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- ▶ Social Project Management
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To be successful in a project environment, project management must permeate every aspect of your business solution. Companies that are able to efficiently meet the demands of managing their portfolio of projects have a distinct advantage over their competition—they have a better understanding of their costs, so they can bid and win business with confidence. Epicor Project Management is a comprehensive solution for companies that plan and execute either simple or complex projects that may require intricate, multilevel phases, as well as strict costing or complex billing methods. Embedded within the robust capabilities of Epicor, Project Management utilizes detailed estimation, planning, scheduling, costing, and supply chain logistics for complete control and analysis of any project. Resource Management provides a detailed representation of resource capabilities and availability. Time and Expense Management and Approval ensure projects reflect accurate costs, and the comprehensive Billing and Revenue Recognition functionality guarantees compliance with contract requirements and accounting standards. At all times and throughout the entire process, embedded Project Analysis and reporting—combined with Business Process Management (BPM)—provides accurate and up-to-date status information and meaningful alerts.
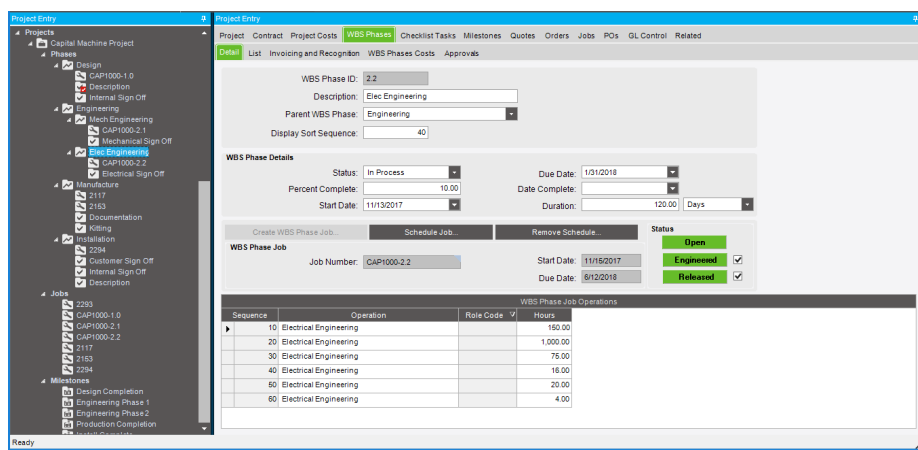
Figure 4 Project Planning and Analysis—Effectively manage the project work breakdown structure no matter how complex. Ease the burden on project managers by providing access to everything relating to the project in a single place.

Project Planning and Analysis

Supporting the needs of industries with a project orientation, Epicor Project Planning provides flexible Work Breakdown Structure (WBS) capabilities—including multilevel phases within a project. Fully embedded within Epicor, Project Management offers the robust Epicor scheduling engine for complete visibility and management of the project schedule. The Project Planning module also includes the ability to accumulate and roll up costs for a WBS Phase to the main project—supporting budgets, estimated completion values, and calculated, estimated, and actual costs accumulated at the WBS Phase or project level. For complete visibility, all costs are rolled up through the project structure, with added analysis capabilities offering cross-project scrutiny of material class, burden, or labor type.

(See figure 4)

Project Generation

Define all project components as part of a logical, cohesive plan. A project can be generated at any time—including at the quote, sales order, or after the contract has been signed with the customer. Define the default project approvals method and workflow group.

Define the work breakdown structure for the project. Automatically create jobs for the collection of costs and management of operations, and define the hierarchy for phase cost accumulation. Define multiple operations, their sequence, defined resource roles, and planned hours as required against each phase job. Optionally define workflow and approvals overrides at the phase level. Create a library of template project WBS structures to represent the various methodologies or requirements of recurring projects. Project structure and contract details can be manipulated in

duplicated projects to reflect any nuances on a particular engagement. Bidirectional integration with Microsoft® Project® gives project managers an additional tool to use to easily manipulate the schedule and simplify the planning of any project.

Social Project Management

Social Project Management gives the internal and external project community visibility into the events of the project—as they happen. This allows teams to achieve transparency regarding project progress and status and enables smarter and more efficient collaboration.

Epicor Social Enterprise provides access to those involved with your projects to subscribe, follow, and trend what matters most to the team. Rather than relying on the team alone, why not leverage the full expertise of an organization or other social network? Project teams are social entities—embedded in multiple social networks both internal and external to the organization. Each member of the team has unique social
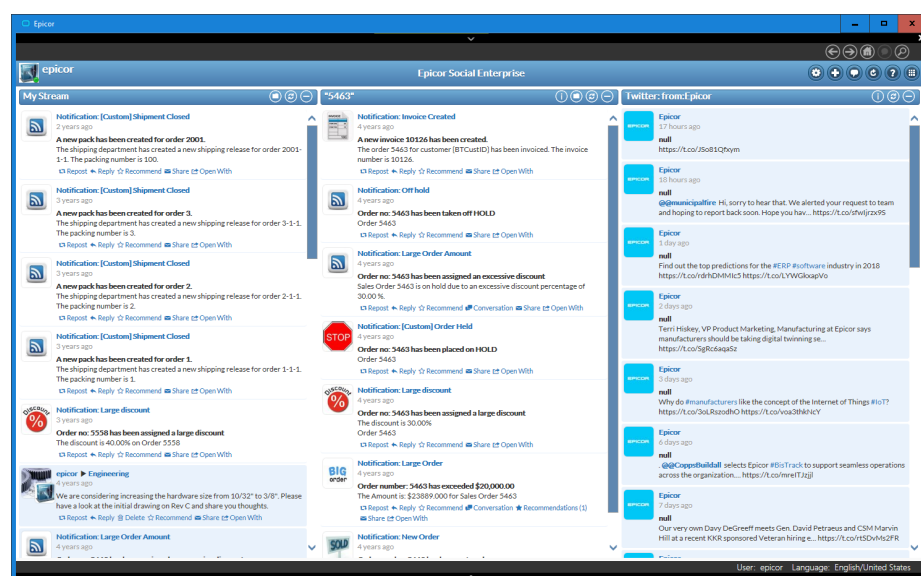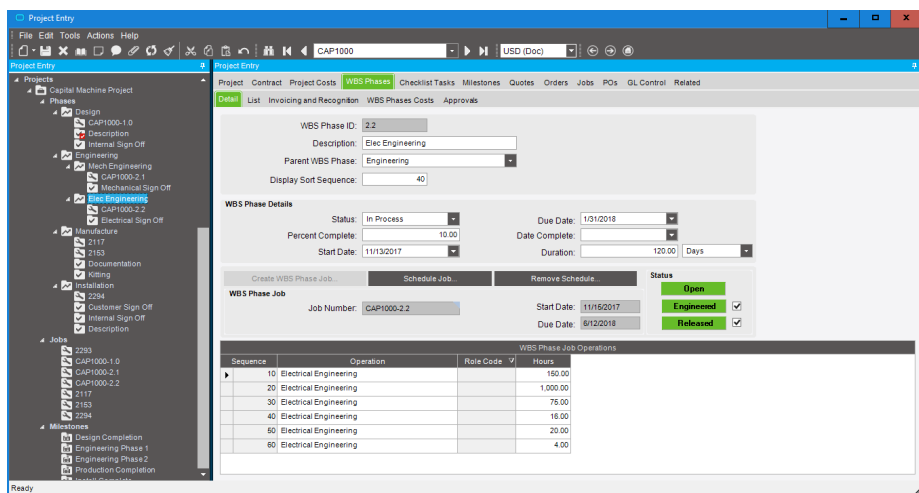

Figure 4.1 Social Project Management—Sharing valuable knowledge helps project teams leverage the full expertise of an organization or other social network.

Figure 4.2 *Project Billing—Comprehensive contract management provides a range of invoicing options to cater for any billing situations.*

Connections inside and outside the organization.

Epicor Social Enterprise allows the project team to tap into social networks for expertise and improved access to knowledge to complete their goals. It allows a project manager to see the social network of their team and leverage those connections to better collaborate with the greater project community.

(See figure 4.1)

Contract Management

Maintain the contractual arrangements for a particular project with Contract Management. Record details of the customer together with key contract dates, values, currency definitions, project manager, and the appropriate revenue recognition method. Define source of costs rates to be applied to the project contract— hierarchical, project, employee, or role. Configuration settings can be used to ensure that only resources with the specific role codes defined in the project contract are able to work and record time against a project. This can be extended to record the specific resources that are approved to work on a particular project contract. Invoice ceilings can be established to limit

the amount billed for a particular role code, resource, or supplier. The contract defines the system behavior when such ceilings are met—either continue or cease invoicing for the defined resource. Epicor BPM can be used to monitor as ceilings are approached. To cater for the needs of certain industries— notably contracts dealing with the U.S. Department of Defense—Burden Sets and the sequence in which they are applied may be maintained and defined against the project contract.

Planning Contract

You can associate a planning contract with one or more projects. New sales orders, purchase orders or jobs linked to a project will inherit the Contract ID. This supports the ability to link demand and supply to the project. The demand linked to a planning contract is filled by the supplies linked to the same planning contract. As a result, the demand is fulfilled specifically from assigned Contract warehouse/bin locations, excluding other non-planning contract warehouses/bins from the fulfillment process. You can link demand to a project, job or sales order indicating where the demand will be consumed.

Revenue Recognition and Analysis

Use the Revenue Recognition Workbench to automate revenue recognition and process the various milestones and contractually defined billing points on a project. You can generate journals for revenue recognition based on the costs produced from the Project Analysis during the life of the project. The journals can be reversed once the project is completed. Easily perform revenue analysis for progress or milestone billing.

Project Billing

Project Management allows you to generate progress and milestone billing, so you can invoice your customer and optionally defer the revenue and cost of sale—recognizing them at various stages in the project. Invoices can be generated based on a fixed date, fixed amount, user-defined stage of project completion, or user-defined cost-to-date. More complex contract arrangements can be defined using the sophisticated options available in Epicor Project Billing.

The advanced invoicing methods available in Epicor Project Billing provide the capability required to handle the commercial terms negotiated during the project bid process. This flexibility enables project managers to focus on managing project delivery in the most efficient way while also handling accurate billing in accordance with a customer-defined schedule—including comprehensive contract management, multiple invoicing methods, time and materials billing, milestone billing, and more.

(See figure 4.2)

Resource Management

Epicor Resource Management provides the ability to define all resources available— whether they are employees, contractors, equipment, or machinery. Comprehensive calendars, resource capabilities, roles, and capacities can be defined, which are then referenced throughout Epicor. Resource
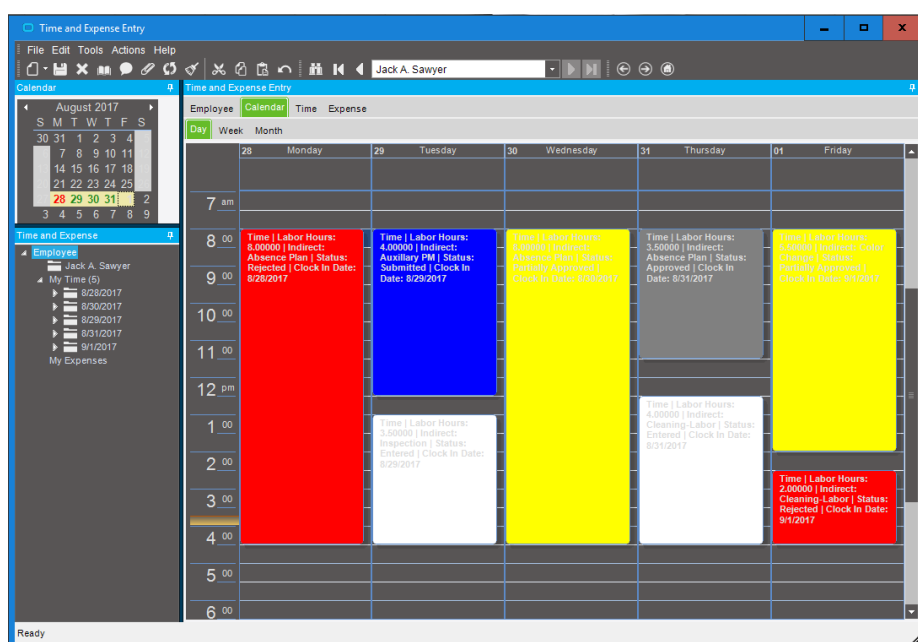
Figure 4.3 *Time Management—Calendar provides clear visibility of missing time sheets entries. The colored blocks indicate the approval status of each time transaction.*

recording. Time recording reliability is reinforced through an array of task-centric entry options, which focus on the critical data required in each context. Additional configuration options ensure that users only have access to authorized jobs and booking codes, with a clear separation between direct and indirect labor entry. Additionally, the flexible approvals process provides the security to ensure that transactions are properly authorized and backed up by a comprehensive audit trail.
(See figure 4.3)

Expense Management

Expense Management in Epicor helps eliminate administrative effort and increase efficiency by providing a secure environment for recording and managing multicurrency expenses across projects, jobs, and service orders, as well as purely internal expenses. The flexible approval process of Expense Management also provides the security to ensure expenses are properly authorized and backed up by a comprehensive audit trail, with approved transactions flowing directly into Accounts Payable for fast, efficient processing and reimbursement. Expenses can be entered on mobile devices via web browser when employees are on the go.

Management additionally provides the comprehensive costing and default burden and billing data used throughout the application—from planning and scheduling to labor bookings. Contractual role requirements and a clear separation of direct and indirect labor are supported in accordance with the specifications of the most demanding contract requirements.

Time Management

Time Management in Epicor provides a highly configurable environment for the recording and management of time across projects, jobs, service orders, and internal codes. A range of entry options are available, each reflecting the nature of a particular transaction. Time can be entered via web browser when employees are on the go, on the shopfloor, or in the office—resulting in quick and accurate

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About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software designed to fit the precise needs of our manufacturing, distribution, retail, and service industry customers. More than 45 years of experience with our customers' unique business processes and operational requirements are built into every solution—in the cloud or on premises. With this deep understanding of your industry, Epicor solutions dramatically improve performance and profitability while easing complexity so you can focus on growth. For more information, connect with Epicor or visit www.epicor.com.

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