Project Management

Project Management is a comprehensive solution for project managers who plan and execute simple or complex projects that can require intricate multi-level phases as well as strict costing. Embedded within the robust capabilities of Epicor Vantage, Project Management utilizes the detailed estimation, planning, scheduling, costing, and supply chain logistics of Epicor Vantage for complete control and analysis (including cross analysis) of any project.

Supporting the needs of Aerospace and Defense as well as Capital Equipment and other industries with large capital projects, the Work Breakdown Structures (WBS) capabilities offer multi-level phases within a project. Fully embedded within Epicor Vantage, Project Management offers the robust Epicor Vantage scheduling engine for complete visibility and management of the project schedule. Additionally, the ability to accumulate and roll up costs for a WBS Phase to the main project as well as support budgets, estimated completion values, calculated estimated and actual costs accumulated at the WBS Phase level or at the project level. For complete visibility of costs and cross analysis, all of the costs are rolled up through the project structure. Added analysis offers cross project analysis of key elements such as a material class or labor type.

Bi-Directional Integration with Microsoft Project gives project managers an additional tool to use to easily manipulate the schedule and simplify the planning of any project.

MULTI-LEVEL WORK BREAKDOWN STRUCTURES (WBS)
Large capital projects require detailed definition that supports the cost structure and planned schedule for the project. Vantage Project Management supports Multi-level phases within a project to offer project managers the ability to visualize complex projects and roll up costs at appropriate levels; project, parent phase, child phase.

PROJECT GENERATION
Define all project components as part of a logical, cohesive plan. A project can be generated at the quote, sales order, or after the contract has been signed with the customer.

PROJECT BUDGETS
Dynamically calculate quoted costs and current estimated costs based on the work breakdown structure as well as manually entered budgets and estimated completion values.

PROJECT SCHEDULE
Calculate project start and due dates by project, by phase, by jobs within a phase or by job assembly, all the way down to individual job operations. A task bar on the scheduling screen displays the job operation’s current percent complete. Labor reported against the job operation incrementally increases the percent complete total and decreases the remaining total hours. Projects can be scheduled using either the Vantage Scheduling system or Microsoft Project.

Stay on top of project status and costs with Project Tracker. Built with visual indicators and drill down functionality, Project Managers can quickly analyze the status of projects.

PROJECT INVENTORY
Assign specific inventory to a project through the projects unique inventory location.

MICROSOFT PROJECT INTEGRATION
Vantage supports a bi-directional integration with Microsoft Project. Create new or import and update Vantage project phases and tasks from within Microsoft Project then upload them in Vantage. Tracking unique data or descriptions within your project, Vantage Project Management lets you upload them too. Optionally use template projects and project phases for faster project planning.

ASSOCIATE MULTIPLE INTERNAL CONTACTS WITH THE PROJECT
Identify groups to automatically receive e-mail alerts when important project transactions occur (e.g., when a particular project milestone is completed) in addition to identifying critical project personnel.

PROJECT TRACKER
Stay on top of project status and costs with Project Tracker. Built with visual indicators and drill down functionality, Project Managers can quickly analyze the status of projects.
BUSINESS PROCESS MANAGEMENT
Supporting strict standards in manufacturing process definition, Epicor Vantage’s Business Process Management gives project managers a tool to define and automate their unique business processes for project definition, approvals, and production standards, through to delivery and finance.

INVOICING
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.

PROJECT ANALYSIS
With over 150 predefined project cost analytics, plus user-defined analysis codes, consolidate and extract any project cost metric—including complete rollups of all cost transactions related to the project or project phase (e.g., job materials, job operations, quote estimates, and sales order information).

COST ANALYSIS
Begin cost analysis with the quote. Quoting allows project analysis of potential projects in the design stage, before the project even begins. The project tracker displays real-time costs for all associated transactions, at the project or phase within the project. For in tighter in process management of project costs, project managers can compare to manually entered budgets, maintain cost to complete metrics and review system generated cost to complete metrics.

REVENUE ANALYSIS
Easily perform revenue analysis for progress/milestone billing. Business Intelligence (BI) streamlines the process with user-defined buckets for revenue analysis (e.g., quoted revenue, current revenue, quoted margin, and current margin). BI provides a thorough cash flow analysis in a straightforward view that is entirely user-defined. Cash flow can be viewed for any timeframe. Dollars are, of course, only one measure of a project’s success. All of the above analysis can also be completed for quoted hours, actual hours, quoted quantities, and actual quantities.

ADVANCED PROJECT ANALYSIS
Supporting the needs of many industries, Project management offers robust data analysis and cost rollups as well as project analysis “snapshots” for progress comparatives against historical.