

# Project Setup by Project Owner

## Table of Contents

I.	Claim project.....	1
A.	Reassign the Project to yourself as Project Owner. (If notified by Bell Icon) .....	1
B.	Reassign the Project to yourself as Project Owner. (If no notification arrived).....	1
II.	Review Project Attachments .....	4
III.	Review Project Setup .....	6
A.	Additional Information Tab - Opportunity Number.....	6
B.	General Tab – Project Details .....	6
C.	Documents Tab – OF, DPM & CRF .....	7
D.	Project Plan.....	8
IV.	Enter SAS Cost and Revenue budget.....	9
A.	Validation of Revenue, Cost & Billable Hours .....	9
B.	Approve Project .....	11
V.	Exception in Project Setup .....	12
A.	Italy (530) .....	12
B.	Norway (630).....	13
C.	Denmark (520) & Finland (600).....	15
D.	Philippines (430), Singapore (435), Malaysia (436) and Thailand (437) .....	15

## Table of Versions

Sr. No.	Date	Version
1	30/01/2025	SAS-PRO-SOP-V1
2	04/04/2025	SAS-PRO-SOP-V2
3	04/11/2025	SAS-PRO-SOP-V3

# I. Claim project

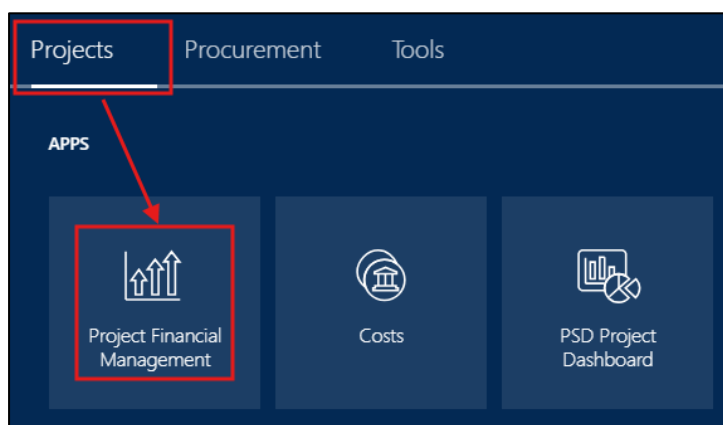
## A. Reassign the Project to yourself as Project Owner. (If notified by Bell Icon)

1. Reassign 'Action Required; Project Status Change Approval' notification to SCA project owner.
2. Click the bell notification in the upper righthand corner
3. Find the notification for 'Action Required: Project Status Change Approval for Project XYZ (1234)' Click the link to open a new window.
4. Actions - Reassign
5. Search for your name, Submit.

General Parties Planning Financial Reporting Additional Information Cost Rate Overrides			
Team Members			
Show <input type="radio"/> All members <input checked="" type="radio"/> Current members			
View <span>+</span> <span>✖</span> <span>📅</span> <span>🔗</span> Detach			
Person	Email	Project Role	Start Date
Weronika Cieslinska	Weronika.Cieslinska@sas.com	Project Administrator	3/1/2024
Kate Dupree	Kate.Langelier@sas.com	Project Owner	3/1/2024

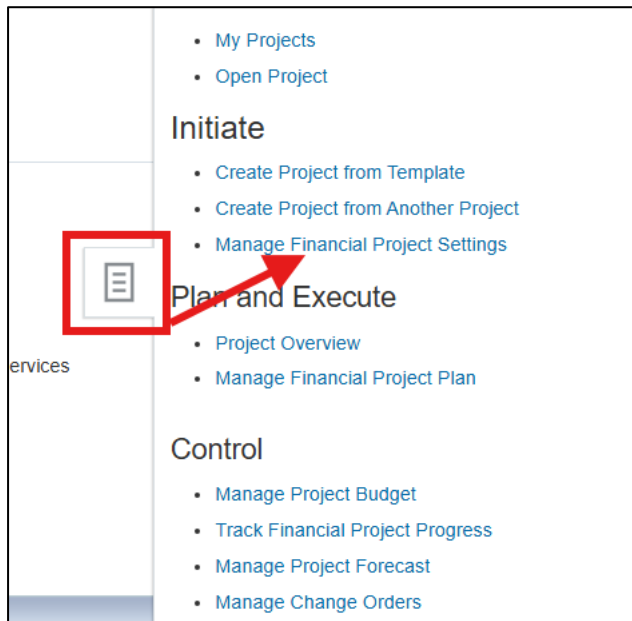
## B. Reassign the Project to yourself as Project Owner. (If no notification arrived)

1. Click on Project > Project Financial Management > Enter Project Number and Project status drop down select 'All' > Click on Search.

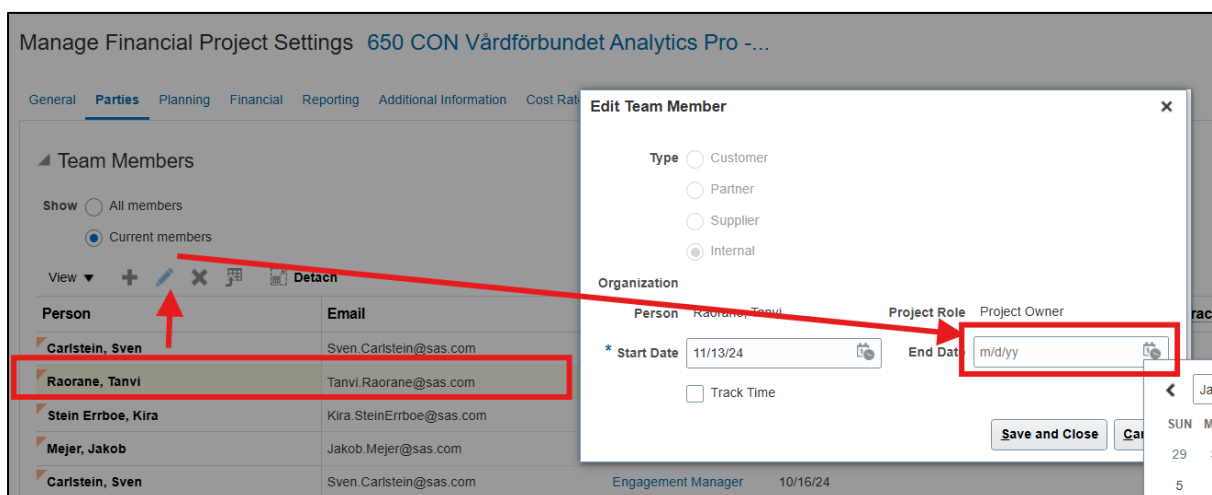
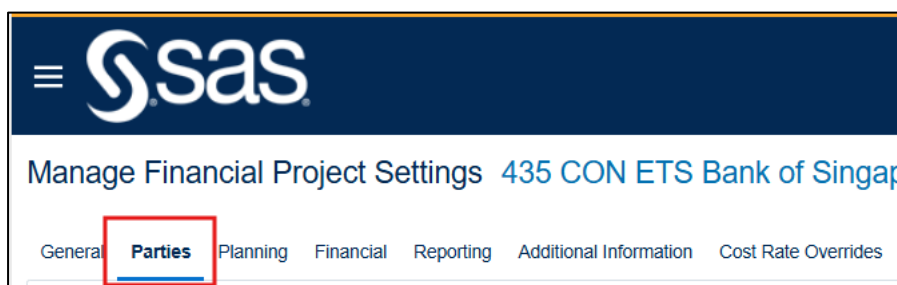


** Project Name <input type="text"/> <b>** Project Number</b> <input type="text" value="650-10104"/> ** Project Manager <input type="text"/> ** Team Member <input type="text"/> ** Customer <input type="text"/> ** Project Set <input type="text"/>	** Organization <input type="text"/> Project Unit <input type="text"/> Business Unit <input type="text"/> Project Type <input type="text"/> <b>Project Status</b> <input type="text" value="All"/> <input type="button" value="Search"/>
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- Click on Project Number > Task bar > Manage Financial Project Settings



- Parties > Select previous Project Owner > Click on pen icon > Add end date (preferably one day prior)

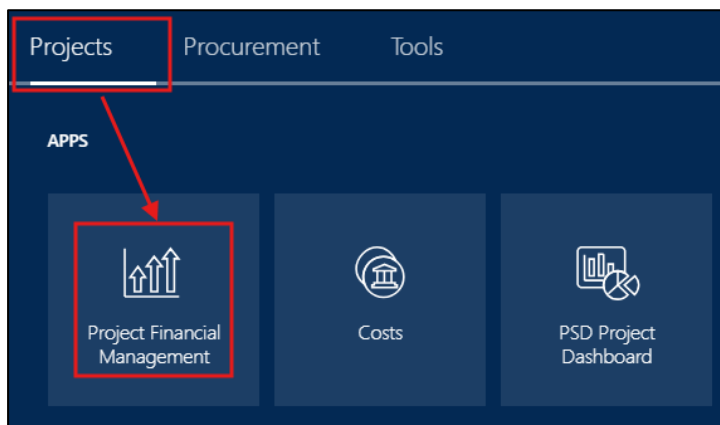



- Click on “+” button > Search for your name > Add “Project Owner” as Project Role > Enter Start Date (Today’s date) > Save and Close

3

## II. Review Project Attachments

1. Project Owner will review project attributes and documents needed to set up the project
  - a) Click on Project > Project Financial Management > Enter Project Number and Project status drop down select 'All' > Click on Search.






- b) Click on Project Number > Go to Documents Tab. (Note: Please check Order Form, DPM and Contract Record Form is uploaded to documents tab)

My Projects ⓘ

► Search

▲ Search Results

View ▼  Create Project ▼  Detach

Project Name	Project Number	Overall Health	Project Status
650 CON Vårdförbundet Analytics Pro...	650-10104		Approved

Project Overview 650 CON Vårdförbundet Analytics Pro -...

Overview Documents Financials Gantt Chart Additional Information

▲ Attachments

View ▼

Type	Category	* File Name or URL	Title	Description
File	Project	SAS Project Contract Configurations and Specificatio...	SAS Project Contract Co...	Config
File	Project	CRF - Vårdförbundet (1).xlsx	CRF - Vårdförbundet (1)...	CRF
URL	Project	https://na11.springcm.com/atlas/Documents/DocExplo...	Order Form	CLM link
File	Project	Vårdförbundet_Billing information.png	Vårdförbundet_Billing info...	Customer/Billin
File	Project Dealsheet	Vårdförbundet_18895750.v.241015.xlsx	Vårdförbundet_18895750...	deal sheet

- c) Confirm Order Form (CLM Link) is attached in the Documents tab. If missing, reject project
- d) Confirm DPM (Dealsheet) is attached in the Documents tab. If missing, reject project
- e) Confirm Contract Record Form (CRF) is attached in Documents tab. If missing, reject project
- f) Confirm Opportunity Number is listed in Additional Information Tab. If missing, reject project
- g) Confirm Project Currency matches the currency in customer agreement in Financial Tab. If incorrect currency is in the project, reject project
- h) Locate the signed customer contract



### III. Review Project Setup

#### A. Additional Information Tab - Opportunity Number

1. Opportunity should be filled in – if missing, reject project. Confirm that Opportunity Number matches the Opportunity Number in the DPM/Dealsheet

Manage Financial Project Settings 650 CON Vårdförbundet Analytic

General Parties Planning Financial Reporting **Additional Information** Cost Rate Overrides

Project Business Type Consulting ▼

GIDB Invoice Number

**Opportunity Number** 18895750

Converted Project Type

Program ▼

MAS TLA Code

Same-company CWK PM ▼

Context Prompt ▼

Account Summary	
Orion Opportunity ID (CSO#):	18895750
Customer:	Vårdförbundet
Project Name:	Analytics Pro - Access to Data
Account Executive (AE):	a
Engagement Manager (EM):	Sven Carlstein
Deployment Specifics	
Project Cost Center:	
Project Cost Center Approvers:	a
Project Cost Center Approver Date:	a
Product Maturity:	
Delivery Complexity:	
Deployment Type:	On-Premises
Consulting Service Location Type:	On Premises
Service Location:	
Solution Type:	Other

Ready Accessibility: Investigate

Setup Pricing Summary Freeform Notes +

#### B. General Tab – Project Details

1. Review Project Name and adjust using Edit button if needed
  - a) “Country Code CON Customer Name Contract Number Supplement Number”;  
example: “650 CON Vårdförbundet C99472-9947220241015”

Manage Financial Project Settings 650 CON Vårdförbundet Analytics Pro -...

General Parties Planning Financial Reporting Additional Information Cost Rate Overrides

4 Basic Information

Project Name 650 CON Vårdförbundet Analytics Pro

Project Number 650-10104

Organization 4571 CNS Consulting Services

Enable budgetary control

Description Att: Victor Ståhl Analytics Pro - Access to Data

Show More

4 Project Classifications

View

Class Category	Class Code	Percent
Initiative	101 - SAS General	
OTL Task Level Validation	Yes	
Program Name	100 - Customer Contract	

Edit Basic Information

Project Name 650 CON Vårdförbundet Analytics Pro

Project Number 650-10104

Organization 4571 CNS Consulting Services

Description Att: Victor Ståhl Analytics Pro - Access to Data

Cascade Option Do not cascade project date changes to tasks

Work Type Consulting-On Premise|Services

Business Unit 650\_SE\_SEK

Legal Entity 650 SAS Institute AB (Sweden)

Project Type Consulting

- b) Confirm Cost Centre/Organization Number
- c) Review project description field and revise as necessary

Edit Basic Information

\* Project Name 650 CON Vårdförbundet Analytics Pro

Project Number 650-10104

Organization 4571 CNS Consulting Services

Description Configuration of Analytics Pro - Access to Data

Cascade Option Do not cascade project date changes to tasks

Work Type Consulting-On Premise|Services

Business Unit 650\_SE\_SEK

Legal Entity 650 SAS Institute AB (Sweden)

Project Type Consulting

Start Date 10/15/24

Finish Date 11/30/24

\* Project Status Approved

\* Outline Display Level 1

Priority

Service Type

Enable budgetary control

Planning project

Save and Close

### C. Documents Tab – OF, DPM & CRF

1. Ensure there is a Project Dealsheet (DPM)
2. Ensure there are no contract attachments in the Documents page

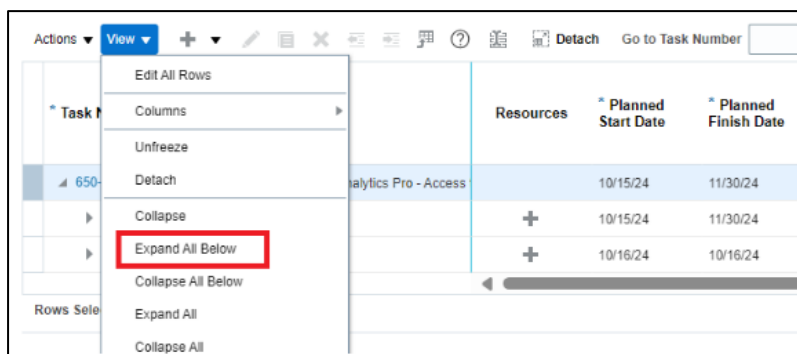
3. If there is a customer contract attachment
  - a) update the attachment file to a URL link to CLM (Edit, + to add line, type = URL, paste link to document in CLM)
  - b) Delete attachment document line by using Edit, select line, “X”, save and close

#### D. Project Plan

1. Open taskbar on righthand side of page → Manage Financial Project Plan



2. View → Expand All tasks



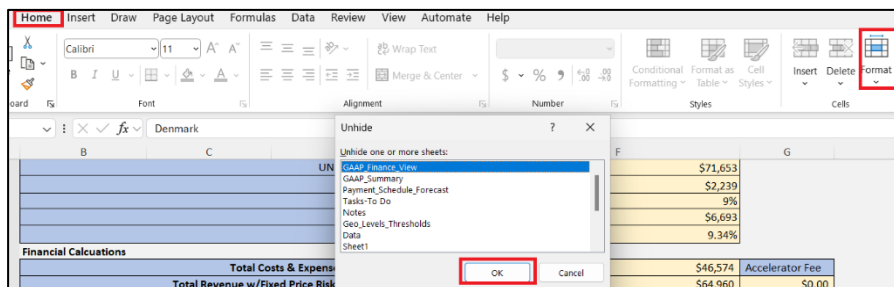
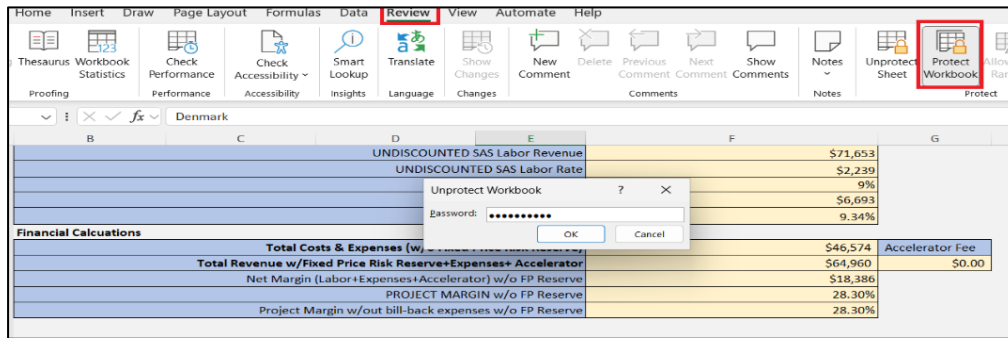
3. Confirm that Organization is the same on all lines

* Task Number	* Task Name	zeive brocompany Inter-project oices	Service Type	Work Type	Physical Percent Complete Calculation Method	Progress ETC Method	Organization	Ag Da
650-10104	650 CON Vårdförbundet Analytics Pro - Access			Consulting-On Premise(Services-ESD)			4571 CNS Consulting Services	
1	Consulting Services			Consulting-On Premise(Services-ESD)	Manual entry	Remaining plan	4571 CNS Consulting Services	
1.1	Services			Consulting-On Premise(Services-ESD)	Manual entry	Remaining plan	4571 CNS Consulting Services	
1.1.1	Billable			Consulting-On Premise(Services-ESD)	Manual entry	Remaining plan	4571 CNS Consulting Services	
1.2	Other			Consulting-On Premise(Services-ESD)	Manual entry	Remaining plan	4571 CNS Consulting Services	
1.2.1	Travel Time			Consulting-On Premise(Services-ESD)	Manual entry	Remaining plan	4571 CNS Consulting Services	
1.2.2	Subcontractor Costs			Consulting-On Premise(Services-ESD)	Manual entry	Remaining plan	4571 CNS Consulting Services	
	FINANCE FINANCE USE ONLY			Consulting-On Premise(Services-ESD)	Manual entry	Remaining plan	4571 CNS Consulting Services	
2	Expenses (Travel)			Consulting-On Premise(Services-ESD)	Manual entry	Remaining plan	4571 CNS Consulting Services	
2.1	Billable Expenses			Consulting-On Premise(Services-ESD)	Manual entry	Remaining plan	4571 CNS Consulting Services	
2.1.1	SAS Expenses			Consulting-On Premise(Expenses)	Manual entry	Remaining plan	4571 CNS Consulting Services	
2.1.2	Subcontractor Expenses			Consulting-On Premise(Expenses)	Manual entry	Remaining plan	4571 CNS Consulting Services	
2.2	Non-Billable Expenses			Consulting-On Premise(Expenses)	Manual entry	Remaining plan	4571 CNS Consulting Services	
2.2.1	SAS Expenses (Non-Billable)			Consulting-On Premise(Expenses)	Manual entry	Remaining plan	4571 CNS Consulting Services	
2.2.2	Subcontractor Expenses (Non-Billable)			Consulting-On Premise(Expenses)	Manual entry	Remaining plan	4571 CNS Consulting Services	

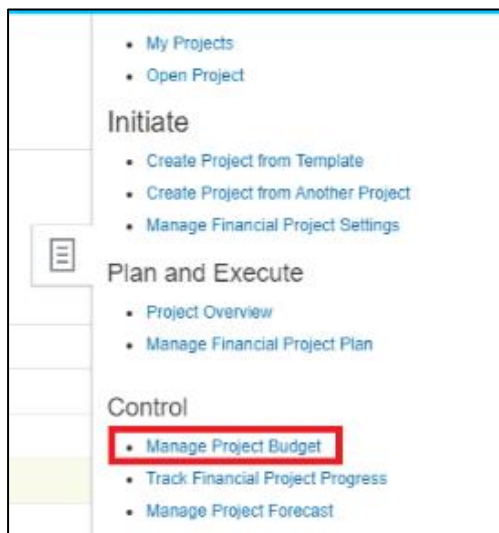
## IV. Enter SAS Cost and Revenue budget

### A. Validation of Revenue, Cost & Billable Hours

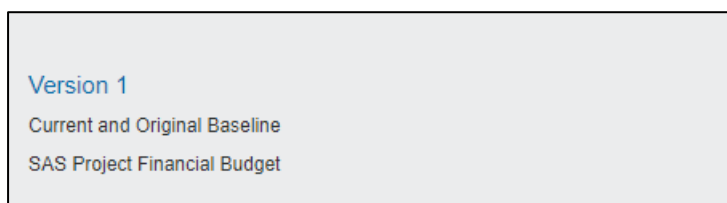
1. Open DPM/Dealsheet, navigate to GAAP Finance View tab in DPM (see separate instructions to open hidden tab)



2. Taskbar → Manage Project Budget



3. Open Version 1 link (SAS Project Financial Budget)



#### 4. Open Planning Options link

#### 5. Expand Budget Creation Details → Additional Information

- Add funding category (Original or Amendment)
- Add latest date contract was signed
- Enter Opportunity Number, Save and Close

#### 6. Expand 1 line

#### 7. In “Labor” line enter

- Quantity = Total labor hours from DPM or Dealsheet
- Revenue = Total labor value of contract document. **Do not use DPM value**
- Raw Cost = Total labor cost from DPM GAAP Finance View Tab
- Ensure margin is correct in Fusion as per DPM GAAP Finance View Tab

Task Number or Resource	Task Name	Planning Currency	Quantity	Revenue	Revenue Rate	Raw Cost	Raw Cost Rate
650-10104	650 CON Vårdförbundet Analytics Pro - Access to Data (RR2409859)			64,960.00 SEK		21,705.00 SEK	
1	Consulting Services			64,960.00 SEK		21,705.00 SEK	
Labor		SEK	32	64,960.00 SEK	2,030.00 SEK	21,705.00 SEK	678.28125 SEK

#### 8. Submit

- Uncheck both selections: ‘Add project attachments to workflow notification’ and ‘Add budget attachments to workflow notification’. No boxes should be checked

- b) Budget is auto approved and baselined – Click refresh button and confirm no rejection

***B. Approve Project***

1. Click the bell notification in the upper right-hand corner and locate 'Project Status Approval for Project' notification → Approve

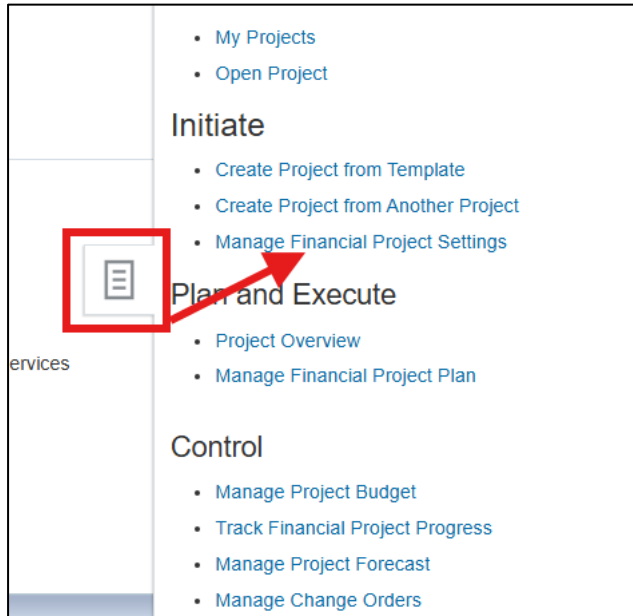


2. Project status should now be Chargeable
3. PM will Submit for Approved status, Project Owner will receive notification to approve "Approved" status. No further review necessary to approve for "Approved" status.

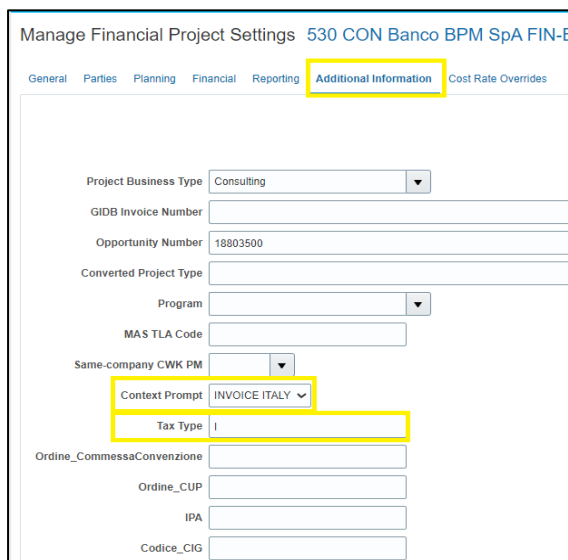
## V. Exception in Project Setup

### A. Italy (530)

1. While setting up a project, go panel draw click on Manage Financial Project Setting



2. Click on Additional Information Tab
3. In Context Prompt checkbox select “Invoice Italy”



Manage Financial Project Settings 530 CON Banco BPM SpA FIN-E

General Parties Planning Financial Reporting **Additional Information** Cost Rate Overrides

Project Business Type Consulting

GIDB Invoice Number

Opportunity Number 18803500

Converted Project Type

Program

MAS TLA Code

Same-company CWK PM

Context Prompt **INVOICE ITALY**

**Tax Type** I

Ordine\_CommissaConvenzione

Ordine\_CUP

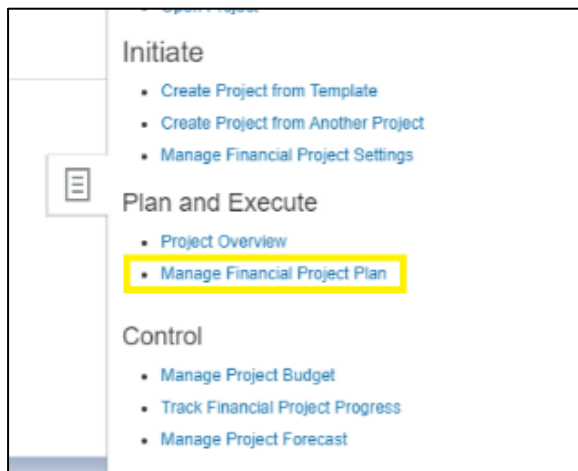
IPA

Codice\_CIG

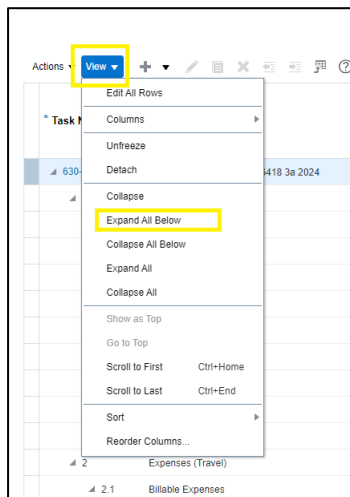
4. In Tax Type checkbox, refer the copy of customer and put the comments accordingly

1. Click Manage Financial Project Plan

1. Click Manage Financial Project Plan



2. Click on View >Expand All Below



3. Under Resources column > click and check below highlighted manage resource Icon



* Task Number	* Task Name	Resources	* Planned Start Date	* Planned Finish Date
630-10068	630 CON Equinor ASA C96418 3a 2024		10/1/24	12/31/24
1	Consulting Services		10/1/24	12/31/24
1.1	Services		10/1/24	12/31/24
1.1.1	DI Migration		10/1/24	12/31/24
1.1.2	HP Risk		10/1/24	12/31/24
1.1.3	Governance		10/1/24	12/31/24
1.1.4	Platform		10/1/24	12/31/24

4. Under manage resource icon - SR: Technical Consultant-Prn: Kyle, Carus

Manage Resources: Platform (1.1.4)

Actions View Resources All

* Resource	Start Date	Finish Date	Quantity
			Planned
SR: Technical Consultant-Prn:	10/1/24	12/31/24	70 Hours

Rows Selected 1 Columns Hidden 36 Columns Frozen 1

5. We need to check whether mentioned people under resources tab belong to same country or not if not than we need to tick in **Receive intercompany and interproject invoices** Box.

https://sas-people.sas.com/?search-type=empno&keyword=R955&source=name&sourceTerm=Kyle,%20Carus

People Search

Rohan Saroj Employee Name Kyle, Carus

Carus Kyle

Email Carus.Kyle@sas.com

Phone +44 1628 490204

Extension

Mobile +44 7739 323212

User ID canczk

Employee No. R955

Country CAN [Canada]

State/Province N/A [Not Applicable]

Office Loc. Home Office

Building REMOTE

Space REMOTE

Position title Sr Technical Architect

Business title Sr Technical Architect

Job Family Group CS - Consulting

Job Family Architecture

Division EMEA/AP CNS (EMEA/AP)

Department Architecture

Dept. Code Architecture2

Cost Center 4571 CNS Consulting

Status Full-Time

Start date 2015-04-22

Office Name SAS Software Ltd (Un)

Reporting Region UK

6. If we see mentioned people in the resources tab outside the Country tick mark in **receive Intercompany & Interproject Invoices**.

* Task Number	* Task Name	Receive Intercompany and Interproject Invoices
630-10068	630 CON Equinor ASA C96418 3a 2024	—
1	Consulting Services	—
1.1	Services	—
1.1.1	DI Migration	✓
1.1.2	HP Risk	✓
1.1.3	Governance	✓
1.1.4	Platform	✓

7. Link where we need to check the people's country.

<https://sas-people.sas.com/?search-type=name&keyword=kyle+&bool=and>

**C. Denmark (520) & Finland (600)**

1. While creating the budget, the revenue amount and billable hours is considered from the pricing tab of DPM instead of GAAP Finance tab.
2. We don't change the project name and description of project as per US KT.

**D. Philippines (430), Singapore (435), Malaysia (436) and Thailand (437)**

1. Saved the unlocked DPM (using password) at: [DAT\\_DPM folder with GAAP rate](#) for the Project Reviewer for approval.

\*\*\*Process End\*\*\*

## Escalation Matrix

Name	Level	Email Address	Landline/Phone Number
Bhaswar Banerjee	Level 1	bhaswar.banerjee@sas.com	N/A
Agnieszka Bartuzi	Level 2	agnieszka.bartuzi@sas.com	+48 22 560 45 83
Beata Kienorow-Gulan	Level 2	beata.kienorow-gulan@sas.com	+48 22 560 45 69