

SAP BUSINESS ONE PROJECT MANAGEMENT USER MANUAL



Table of Content

1. Introduction
2. Project Master Data
3. Create Project Master Data
4. Project Stages
5. Set up Project Stages
6. Handling Open Issues
7. Add Document
8. Add an Activity
9. Document Billing Wizard
10. Gantt Chart
11. Project Reporting

Introduction

In SAP Business One, the Project module can be used to manage different types of projects in the system.

This module enables the user to create a project master data, attach related documents, run billing wizard and develop project reports.

The project management module can be enabled:

In the Administration → System initialization → Company details on the Basic Initialization tab.

Purpose of the Manual

- ❖ To associate users with the SAP SuccessFactors Employee Central module.
- ❖ To help client to develop a working knowledge as a system user and learn how to use basic tools for project management purposes in your organization.

How To Use the Manual

- ❖ Various illustrations will be used to explain the steps that required to complete various functions in this module

Project Master data

Project master data window is a workbench that is a workbench that centralizes different aspects of the project and enables you to document the different stages of the project.

Project Master data can be composed of marketing and inventory documents, service solutions and activities. In addition, a financial project code can be linked to each project.

Project status

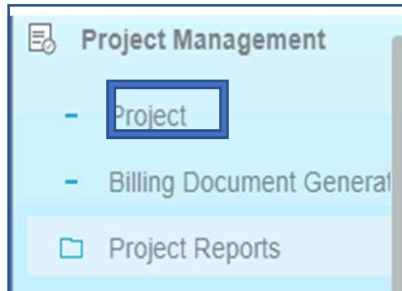
- Started is when the project process kicks off
- To put a project on hold temporarily, the *Paused* status should be chosen.
- *Stopped*: user chooses this status when a project is stopped before anticipated.
- When selecting *Stopped* or *Finished*, the current date is automatically updated in the closing date field but can be changed.
- To finish a project all tasks should be checked

Steps:

1. Define project master data header
2. Define the overview tab
3. Define the project stages
4. Define the related documents
5. Define the subprojects
6. Run the Billing Document Wizard
7. Generate project reports

Note: The end date is an estimated or desired date the user enters. The finished date, on the other hand, is the actual date when the stage row was completed. Once checking the *Finished* box, today's date is automatically populated in the *Finished* field. This date can be adjusted manually.

Project Master data- Header



Project - Project Delta

Project Type: ☒ External ☐ Internal

BP Code: C00001

BP Name: Delta State Government

Contact Person:

Territory:

Sales Employee: -No Sales Employee-

Owner:

☒ Project with Subprojects

Project Name: Project Delta

Project No.: Primary 1

Status: Started

Start Date: 01.03.19

Due Date: 20.03.19

Closing Date:

Open Activities: 0

% Complete: 0%


Financial Project: ProjectDelta

#	Start Date	End Date	Finished Date	Stage	Task	Description	Unique ID	Planned Cost	Invoiced Amount (A/R)	Open Amount (A/R)	Invoiced A...
1	01.03.19	01.03.19		Conception/Initiation	Project Kick-off	Project Kick-Off		50,000.00	0.00	0.00	
2	02.03.19	03.03.19		Definition/Planning	Requirement C	Requirements Gathering		500,000.00	0.00	0.00	
3	04.03.19	07.03.19		Launch/Execution	Installation	Installation		1,000,000.00	0.00	0.00	
4	08.03.19	10.03.19		Launch/Execution	Configuration	System Configuration		400,000.00	0.00	0.00	
5	11.03.19	13.03.19		Launch/Execution	Migration	Data Migration		600,000.00	0.00	0.00	
6	14.03.19	19.03.19		Performance and contr	UAT/Training	UAT/Training		400,000.00	0.00	0.00	
7	20.03.19	20.03.19		Finishing Stage	Go-Live	Go-Live		100,000.00	0.00	0.00	
8				Conception/Initiation				0.00	0.00	0.00	

Steps;

1. Select project
2. Click on the Add
3. Select project type
4. Select business partner code
5. Select owner
6. Add Dates
7. Define financial project

Project Master Data- Overview



Project Management

- Project
- Billing Document Generat

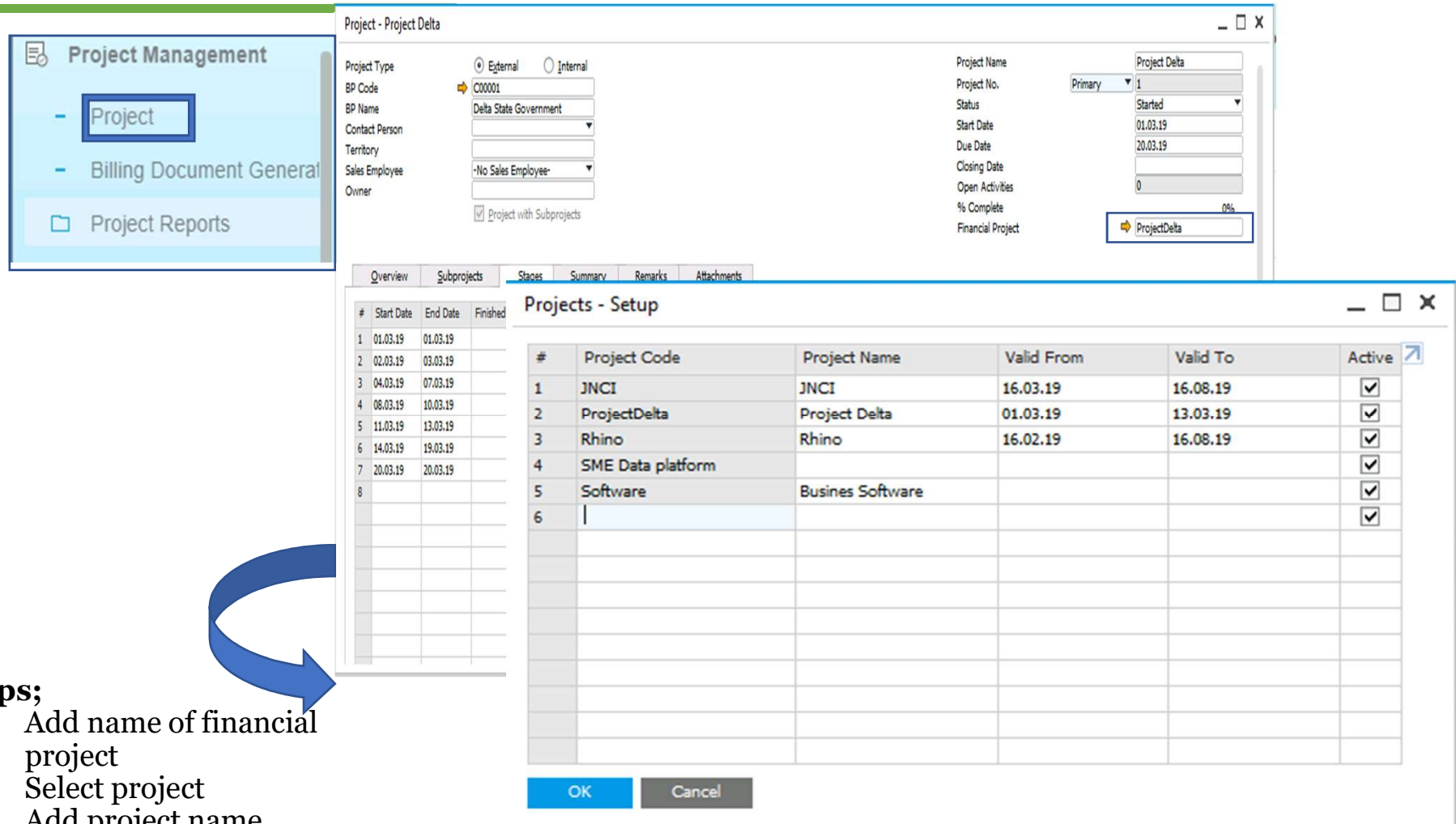
Project Reports

[illegible]

Steps;

1. Select project
2. Click on the Add
3. Select Overview
4. Select Risk level
5. Select industry
6. Move to the next tab

Define Financial Project



Project Management

- Project**
- Billing Document General
- Project Reports

Project - Project Delta

Project Type: ☒ External ☐ Internal

BP Code: C00001

BP Name: Delta State Government

Contact Person:

Territory:

Sales Employee: -No Sales Employee-

Owner:

☒ Project with Subprojects

Project Name: Project Delta

Project No.: 1

Status: Started

Start Date: 01.03.19

Due Date: 20.03.19

Closing Date:

Open Activities: 0

% Complete: 0%

Financial Project: ProjectDelta

Projects - Setup

#	Project Code	Project Name	Valid From	Valid To	Active
1	JNCI	JNCI	16.03.19	16.08.19	<input checked="" type="checkbox"/>
2	ProjectDelta	Project Delta	01.03.19	13.03.19	<input checked="" type="checkbox"/>
3	Rhino	Rhino	16.02.19	16.08.19	<input checked="" type="checkbox"/>
4	SME Data platform				<input checked="" type="checkbox"/>
5	Software	Busines Software			<input checked="" type="checkbox"/>
6					<input checked="" type="checkbox"/>

OK Cancel

Steps;

1. Add name of financial project
2. Select project
3. Add project name
4. Add Valid From and Valid To
5. Click on Active box
6. Click Update to add information

Set up Default Project Stages

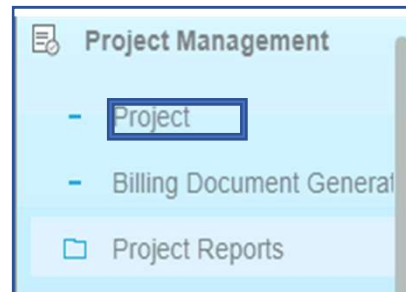
In the Main menu → Administration → Setup → Project management → Stages

Stages can be preconfigured in the Administration module Steps;

1. Fill in the name and description
2. Click on Add

[illegible]

Project Master Data- Stages



Project - Project Delta

Project Type: ☒ External ☐ Internal

BP Code: C00001

BP Name: Delta State Government

Contact Person:

Territory:

Sales Employee: -No Sales Employee-

Owner:

☒ Project with Subprojects

Project Name: Project Delta

Project No.: Primary 1

Status: Started

Start Date: 01.03.19

Due Date: 20.03.19

Closing Date:

Open Activities: 0

% Complete: 0%

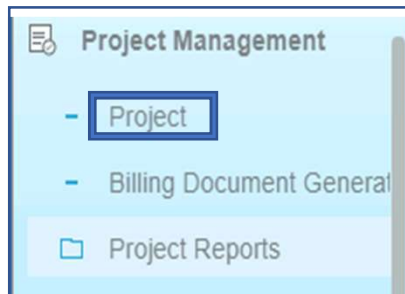
Financial Project: ProjectDelta

#	Start Date	End Date	Finished Date	Stage	Task	Description	Unique ID	Planned Cost	Invoiced Amount (A/R)	Open Amount (A/R)	Invoiced A...
1	01.03.19	01.03.19		Conception/Initiation	Project Kick-off	Project Kick-Off		50,000.00	0.00	0.00	
2	02.03.19	03.03.19		Definition/Planning	Requirement C	Requirements Gathering		500,000.00	0.00	0.00	
3	04.03.19	07.03.19		Launch/Execution	Installation	Installation		1,000,000.00	0.00	0.00	
4	08.03.19	10.03.19		Launch/Execution	Configuration	System Configuration		400,000.00	0.00	0.00	
5	11.03.19	13.03.19		Launch/Execution	Migration	Data Migration		600,000.00	0.00	0.00	
6	14.03.19	19.03.19		Performance and contr	UAT/Training	UAT/Training		400,000.00	0.00	0.00	
7	20.03.19	20.03.19		Finishing Stage	Go-Live	Go-Live		100,000.00	0.00	0.00	
8				Conception/Initiation				0.00	0.00	0.00	

- Note: Project is composed of stages, each stage row holds a completion rate(rate of all stages amount to 100%)

Create Project Stages

Project Management → Project



Project - Project Delta

Project Type: ☒ External ☐ Internal

BP Code: C00001

BP Name: Delta State Government

Contact Person:

Territory:

Sales Employee: -No Sales Employee-

Owner:

☒ Project with Subprojects

Project Name: Project Delta

Project No.: Primary 1

Status: Started

Start Date: 01.03.19

Due Date: 20.03.19

Closing Date:

Open Activities: 0

% Complete: 0%

Financial Project: ProjectDelta

Overview Subprojects **Stages** Summary Remarks Attachments

#	Start Date	End Date	Finished Date	Stage	Task	Description	Unique ID	Planned Cost	Invoiced Amount (A/R)	Open Amount (A/R)	Invoiced A...
1	01.03.19	01.03.19		Conception/Initiation	Project Kick-off	Project Kick-Off		50,000.00	0.00	0.00	
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4	08.03.19	10.03.19		Launch/Execution	Configuration	System Configuration		400,000.00	0.00	0.00	
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6	14.03.19	19.03.19		Performance and contr	UAT/Training	UAT/Training		400,000.00	0.00	0.00	
7	20.03.19	20.03.19		Finishing Stage	Go-Live	Go-Live		100,000.00	0.00	0.00	
8				Conception/Initiation				0.00	0.00	0.00	

Steps;

1. Select project
2. Click on the Add
3. Select the stages tab
4. Add stages
5. Add start date, end date and finish date
6. Add task or define new
7. Add description
8. Add Planned cost

Project Master Data- Related Documents

Project Management

- **Project**
- Billing Document General
- Project Reports

Project - Project Delta

Project Type: ☒ External ☐ Internal
BP Code: C00001
BP Name: Delta State Government
Contact Person:
Territory:
Sales Employee: -No Sales Employee-
Owner:
☒ Project with Subprojects

Project Name:
Project No.: Primary
Status: Started
Start Date: 01.03.19
Due Date: 20.03.19
Closing Date:
Open Activities: 0
% Complete: 0%
Financial Project: ProjectDelta

#	Start Date	End Date	Finished Date	Stage	Task	Description	Unique ID	Planned Cost	Invoiced Amount (A/R)	Open Amount (A/R)	Invoiced A...
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2	02.03.19	03.03.19		Definition/Planning	Requirement C	Requirements Gathering		500,000.00	0.00	0.00	
3	04.03.19	07.03.19		Launch/Execution	Installation	Installation		1,000,000.00	0.00	0.00	
4	08.03.19	10.03.19		Launch/Execution	Configuration	System Configuration		400,000.00	0.00	0.00	
5	11.03.19	13.03.19		Launch/Execution	Migration	Data Migration		600,000.00	0.00	0.00	
6	14.03.19	19.03.19		Performance and contr	UAT/Training	UAT/Training		400,000.00	0.00	0.00	
7	20.03.19	20.03.19		Finishing Stage	Go-Live	Go-Live		100,000.00	0.00	0.00	
8				Conception/Initiation				0.00	0.00	0.00	

Open Issues
Attachments
Documents
Work Orders
Activities

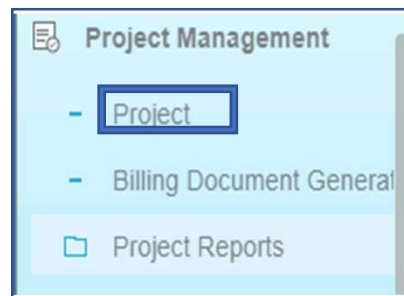
OK Cancel

Steps;

1. Select project
2. Scroll down and use the drop down menu

Note: For each stage in the *Project Master Data*, different data can be referenced.

Project Master Data- Subproject



A subproject is treated as a sublevel project. One project can contain several subprojects, each of which can contain subprojects as well

Steps;

1. Select project
2. Click on the Add
3. Select the Subprojects tab
4. Add Subproject no
5. Add description and type
6. Add start date, end date and finish date
7. Add Planned cost
8. Add owner

A screenshot of a software window titled 'Project - Project Delta'. The window has a top toolbar with various icons. On the left, there are input fields for 'Project Type' (radio buttons for External and Internal), 'BP Code' (C00001), 'BP Name' (Delta State Government), 'Contact Person', 'Territory', 'Sales Employee' (-No Sales Employee-), and 'Owner'. There is a checkbox for 'Project with Subprojects' which is checked. On the right, there are input fields for 'Project Name' (Project Delta), 'Project No.' (Primary), 'Status' (Started), 'Start Date' (01.03.19), 'Due Date' (20.03.19), 'Closing Date', 'Open Activities' (0), '% Complete' (0%), and 'Financial Project' (ProjectDelta). Below these fields is a tabbed interface with tabs for 'Overview', 'Subprojects', 'Stages', 'Summary', 'Remarks', and 'Attachments'. The 'Subprojects' tab is active, showing a table with columns: Sub..., Subpr..., Start Date, End Date, Planne..., Actual ..., Subpr..., Compl..., Owner, and Closed. The first row of the table contains the following data: 1, 1, Procurement, 01.03.19, 10.03.19, 2,000,000.0, 0.00, 0.00, 0.00, and a checkbox.

Handling Open Issues


#	Area	Priority	Remarks	Closed	Solution	Solution Description	Responsible	Entered By	Date Entered	Estimated Costs

▶ Attachments
▶ Documents
▶ Work Orders
▶ Activities

OK Cancel

An open-issues dedicated report exists to analyse recurring issues in projects

Steps;

1. Select the drop down menu 
 - Add the following fields:
 - Area
 - Priority
 - Remarks
 - Closed
 - Solution or Check for pre-defined solution from the Solution Knowledge base
 - Responsible
 - Estimated costs
2. Click on Update to save changes

Note: that a stage row cannot be marked as finished while an open issue related to this stage exists. Also, the solution knowledge base is defined in the Service module.

Add Documents

#	Doc. Type	Doc. No.	Doc. Line	Doc. Date	Total	Chargeable	Categorize As	Operation

Work Orders
Activities

OK Cancel

Connecting documents to a project stage

Steps;

1. Select the document type i.e A/R invoice (then the amount is copied to the stages table)
2. Add Document number
3. Select Update to save changes

Note: that A/R invoices and deliveries can also be issued in a batch using the Billing Document Generation wizard

Add Activity

#	Activity	Type	Start Date	Start Time	End Date	End Time	Assigned To	Remarks

OK Cancel

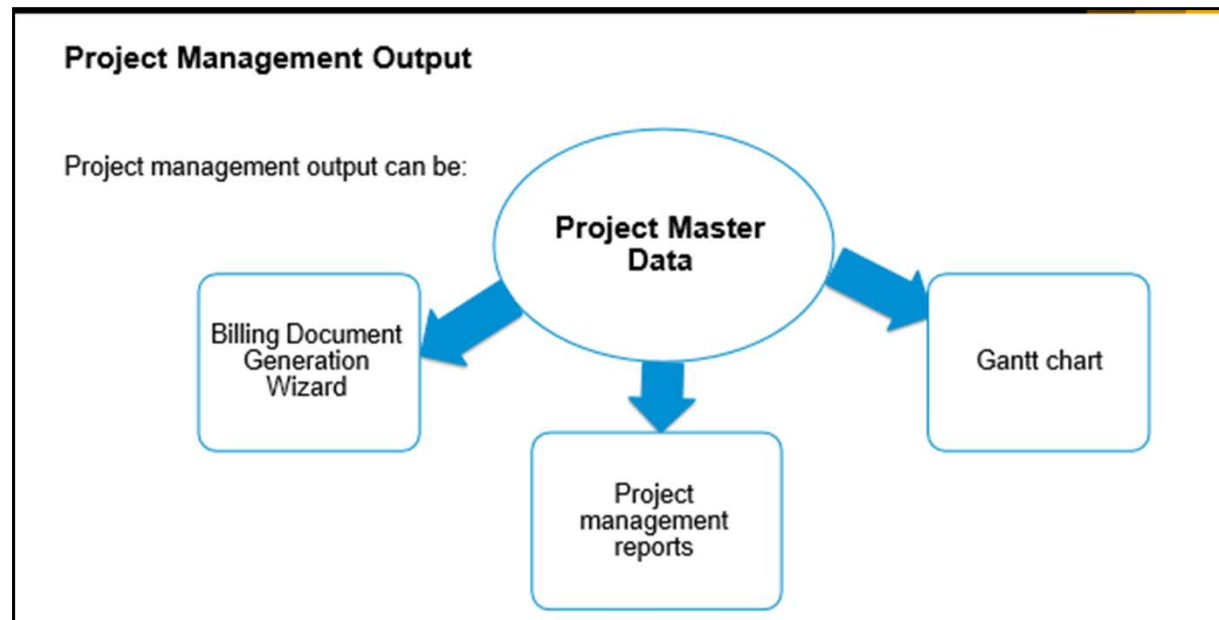
User can add an process related to the project i.e a meeting

Steps;

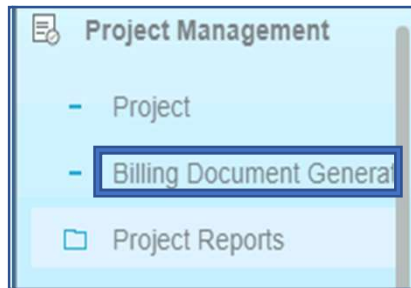
1. Activities added in the CRM can be copied to activity row in the project management module
2. Also, activities can added manually by filling the fields and clicking Update to save changes made.

Note: An activity related to a project can be created directly from the CRM or Business Partner module. Once the project data is entered to the activity, it is automatically added to the relevant project stage.

Project management Output



Billing Document Generation Wizard



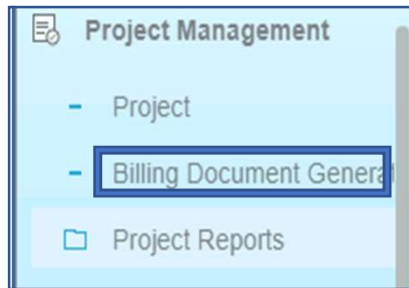
The wizard collects open documents and billable items connected to your project for invoicing through A/R Invoices or Deliver

Steps;

1. Click on Billing document generation wizard
2. Add the financial project
3. Add project stage
4. Select Target document
5. Add document
6. Click on the required Source types
7. Add posting and delivery date (From and To)
8. Click on Next

A screenshot of the 'Billing Document Generation Wizard' dialog box, labeled 'Step 1 of 3'. The dialog has a title bar with standard window controls. It contains several input fields and checkboxes. On the left, there are labels for 'Target Document', 'Target Doc. Type', 'Target Doc. Series', and 'Customer'. To their right are dropdown menus for 'Delivery', 'Item', and 'Primary', and a text field for 'Customer'. On the right side, there are labels for 'Financial Project', 'Project No.', 'Subproject No.', and 'Stage', each followed by a text field. Below these, there is a section titled 'Source Types' with a list of checkboxes: 'Include open AP Documents', 'Include open AR Documents', 'Sales Quotations (0)' (selected with a radio button), 'Sales Orders (0)', 'Res. Invoice (0)', 'Include Closed Work Orders', 'Include Recorded Times', and 'Include Project Activities'. To the right of these checkboxes are two columns of date fields labeled 'From' and 'To', with 'Posting Date' and 'Delivery Date' as labels. At the bottom right, there are four buttons: 'Cancel', 'Back', 'Next', and 'Finish'.

Billing Document Generation Wizard

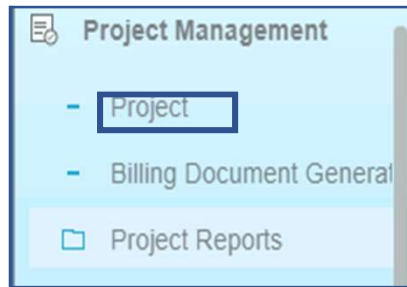
A screenshot of the "Billing Document Generation Wizard" window. The title bar says "Billing Document Generation Wizard". The main heading is "Base Document Line Items" with a subtitle "To generate the target document, select one or more base documents." Below this is a table with the following columns: "#", "Confirmed", "Base Doc. Type", "Base Doc.", "Description of Service", "Base Price Service", "Activity Type", "Item No.", and "Item Description". The table is currently empty. At the bottom left of the window, it says "Step 2 of 3".

Confirm which documents you want to place on the target document

Steps;

1. Add the target document using the Confirmed checkbox.
2. Note: Items must exist for a document to be confirmed
3. You may fill Activity type and other fields
4. Click Finish to save changes

Gantt Chart



Project - Project Delta

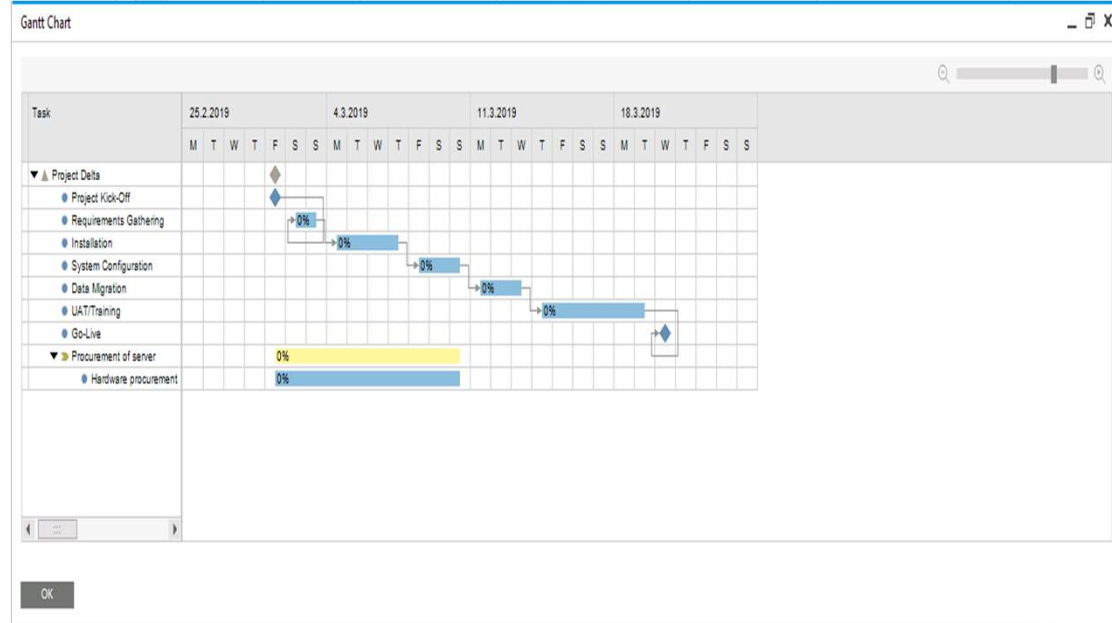
Project Type ☒ External ☐ Internal
 BP Code
 BP Name
 Contact Person
 Territory
 Sales Employee
 Owner
☒ Project with Subprojects

#	Start Date	End Date	Finished Date	Stage
1	01.03.19	01.03.19		Conception/Initiation
2	02.03.19	03.03.19		Definition/Planning
3	04.03.19	07.03.19		Launch/Execution
4	08.03.19	10.03.19		Launch/Execution
5	11.03.19	13.03.19		Launch/Execution
6	14.03.19	19.03.19		Performance and contr
7	20.03.19	20.03.19		Finishing Stage

- Cancel
- General Ledger
- Transaction Report by Projects
- Document Journal
- Trial Balance
- Profit and Loss Statement
- Project Overview
- Time Sheet Report
- Billing Document Generation Wizard
- Gantt Chart**
- Distribution Report

Steps;

1. Right click on the active project window
2. Select Gantt Chart to generate the report



Project Reporting

Project Reports

Three available reports:



Stage Analysis

List of open projects that can be drilled down to receive a list of related stages



Open Issues

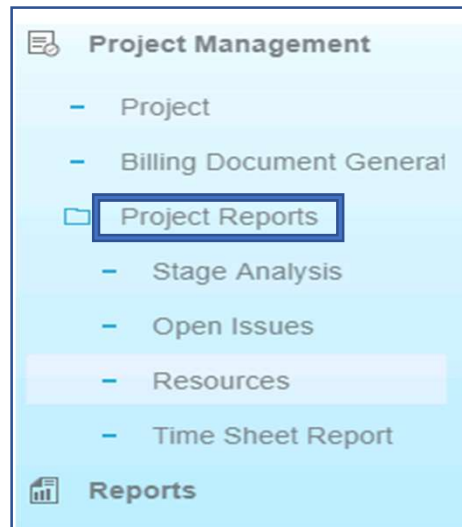
List of open issues that can be filtered by owner/ priority /project



Resources

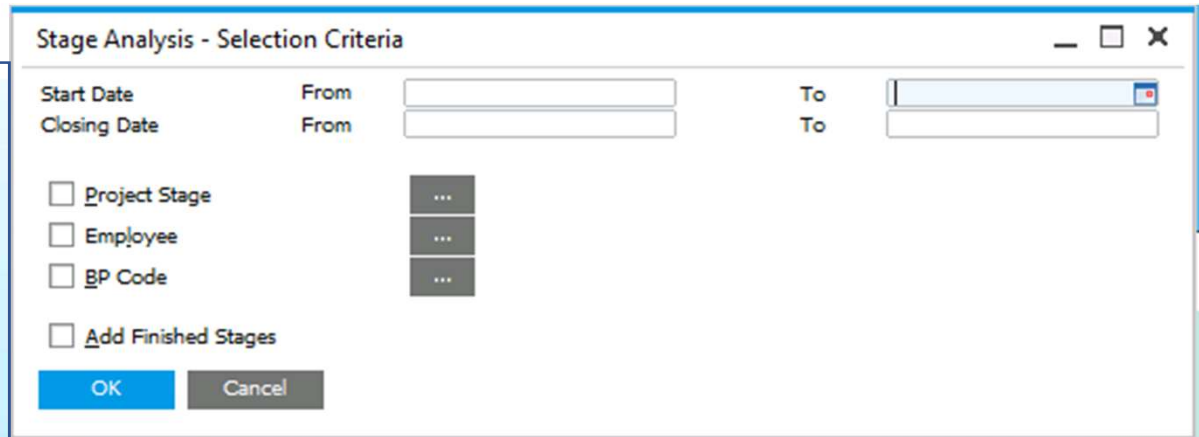
List of resources related to projects

Project Reporting



The screenshot shows a 'Project Management' menu with several options. The 'Project Reports' option is highlighted with a blue border. Below it, there are sub-options: 'Stage Analysis', 'Open Issues', 'Resources', and 'Time Sheet Report'. At the bottom of the menu is a 'Reports' section with a bar chart icon.

- Project Management
 - Project
 - Billing Document General
 - Project Reports**
 - Stage Analysis
 - Open Issues
 - Resources
 - Time Sheet Report
- Reports



The 'Stage Analysis - Selection Criteria' dialog box contains fields for 'Start Date' and 'Closing Date', each with 'From' and 'To' date pickers. Below these are four checkboxes: 'Project Stage', 'Employee', 'BP Code', and 'Add Finished Stages'. Each checkbox has a corresponding '...' button. At the bottom are 'OK' and 'Cancel' buttons.

Start Date From To
Closing Date From To

☐ Project Stage ...
☐ Employee ...
☐ BP Code ...
☐ Add Finished Stages

OK Cancel

Steps;

1. Select the project reports
 2. Select desired project report
- Stage analysis
 - Open issues



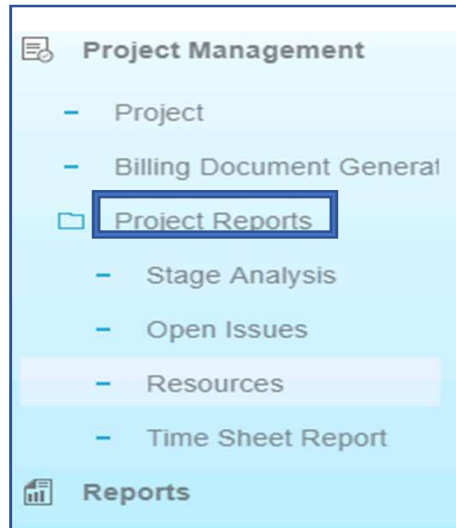
The 'Open Issues - Selection Criteria' dialog box contains fields for 'Project', 'Responsible Person', and 'Due Date', each with 'From' and 'To' date pickers. Below these are three checkboxes: 'Closed', 'Priority', and 'Area'. Each checkbox has a corresponding '...' button. At the bottom are 'OK' and 'Cancel' buttons.

Project From To
Responsible Person From To
Due Date From To

☐ Closed
☐ Priority ...
☐ Area ...

OK Cancel

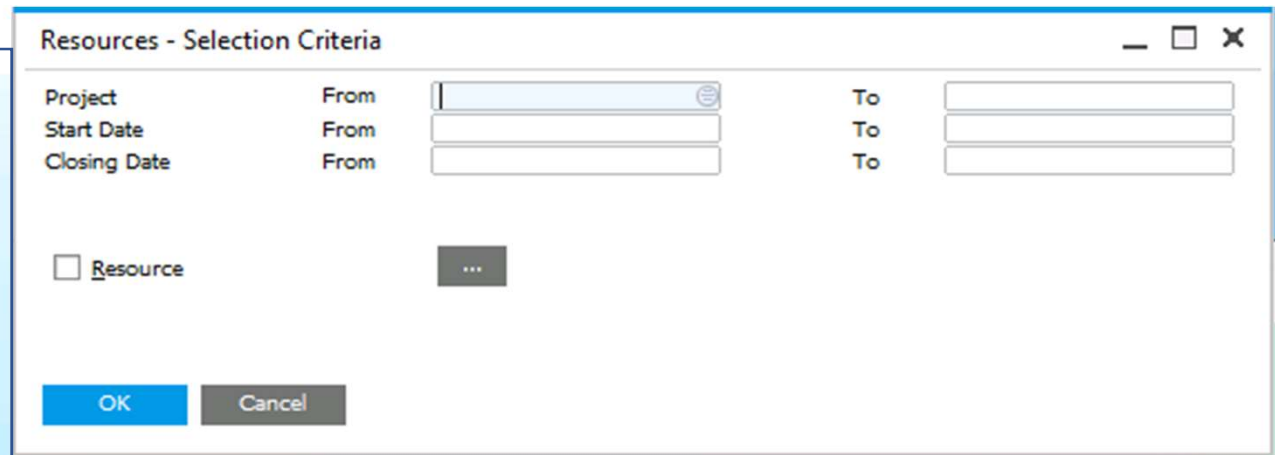
Project Reporting



Project Management

- Project
- Billing Document General
- Project Reports**
- Stage Analysis
- Open Issues
- Resources
- Time Sheet Report

Reports



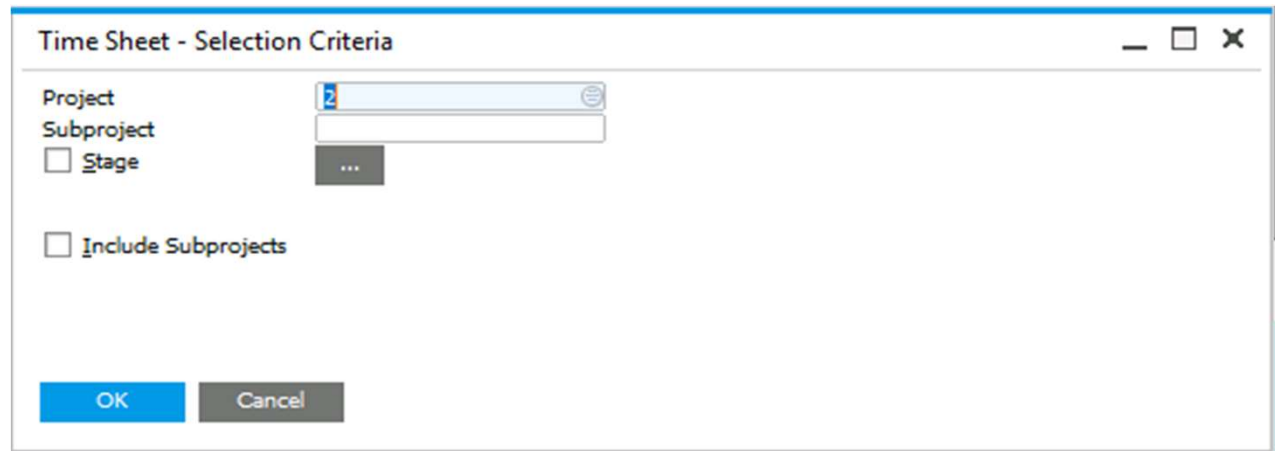
Resources - Selection Criteria

Project	From	<input type="text"/>	To	<input type="text"/>
Start Date	From	<input type="text"/>	To	<input type="text"/>
Closing Date	From	<input type="text"/>	To	<input type="text"/>

☐ Resource

Steps;

1. Select the project reports
2. Select desired project report
 - Resources
 - Time sheet



Time Sheet - Selection Criteria

Project

Subproject

☐ Stage

☐ Include Subprojects



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