SAP BUSINESS ONE
PROJECT MANAGEMENT
USER MANUAL

HECKERBELLA

Table of Content

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

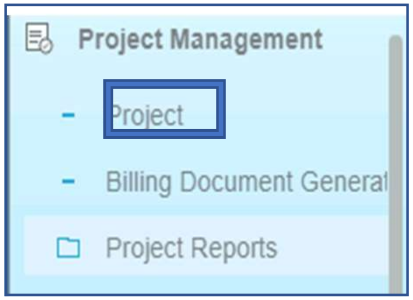
- Started is when the project process kicks off
- To put a project on hold temporarily, the *Paused* status should be chosen.
- *Stopped*: user chooses this status when a project is stopped before anticipated.
- When selecting *Stopped* or *Finished*, the current date is automatically updated in the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

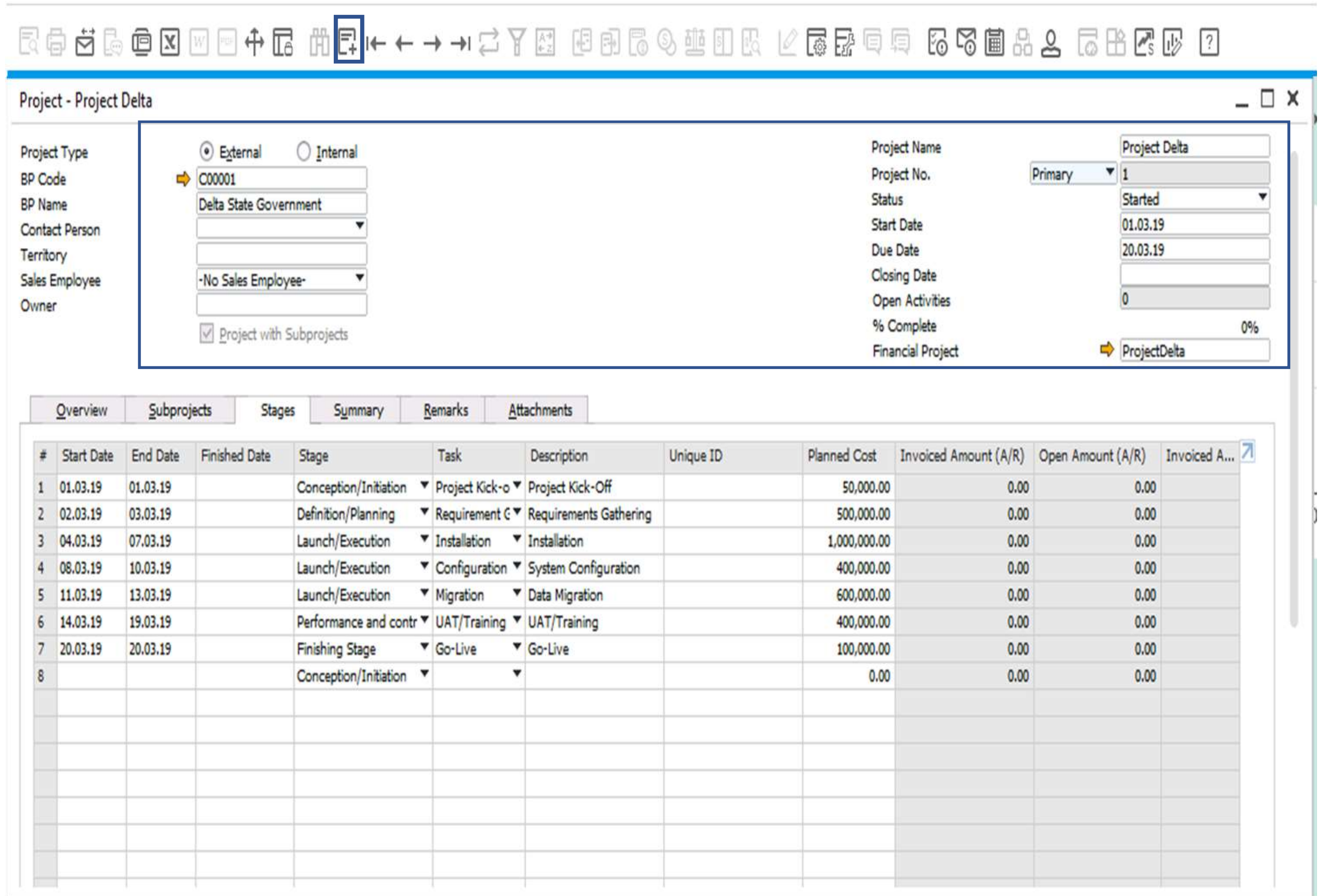
Steps:

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

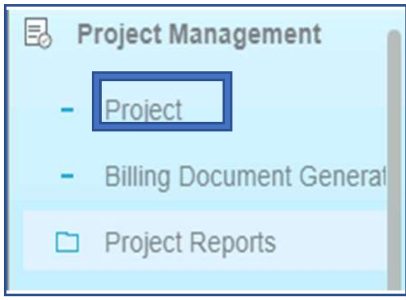


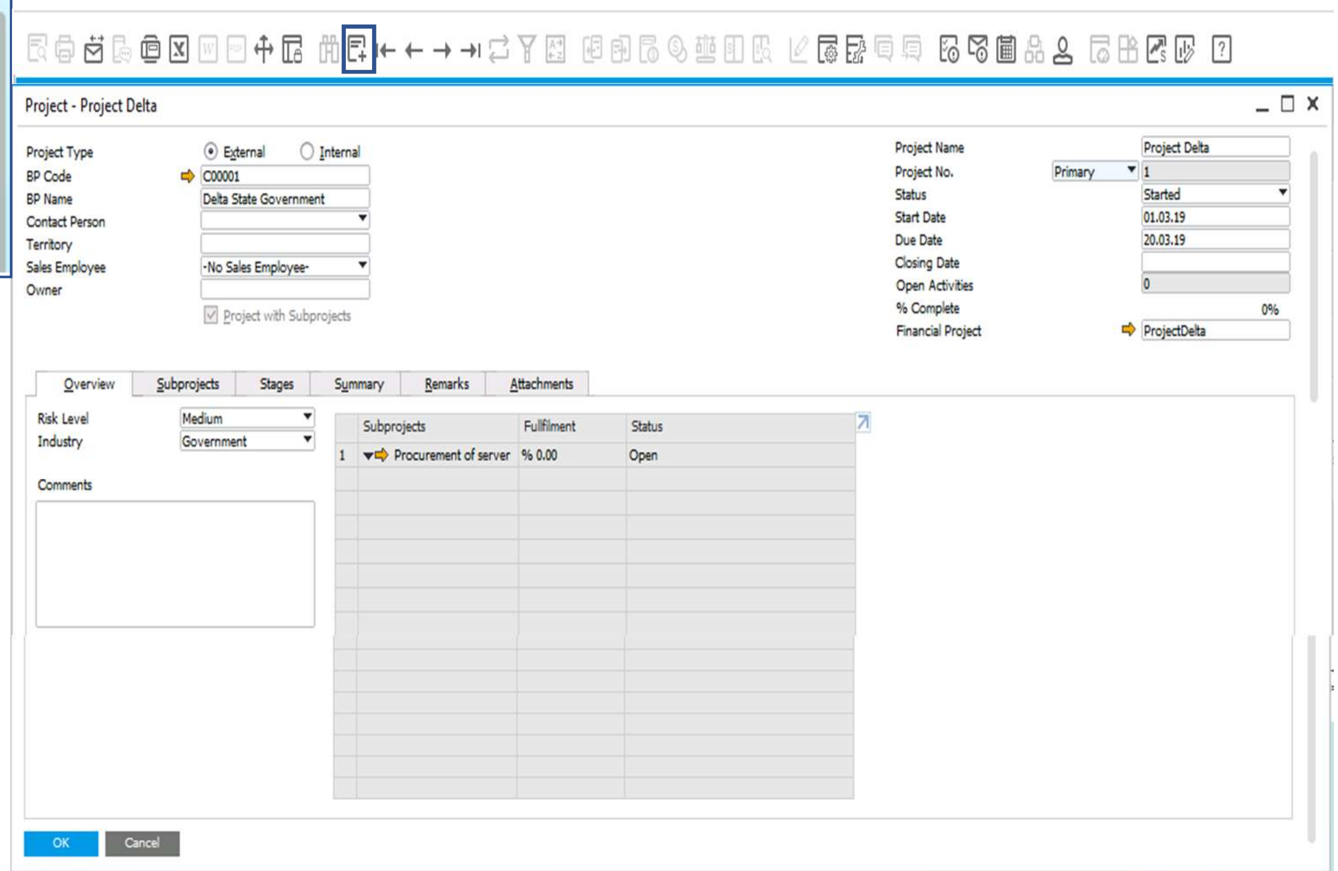


Steps;

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

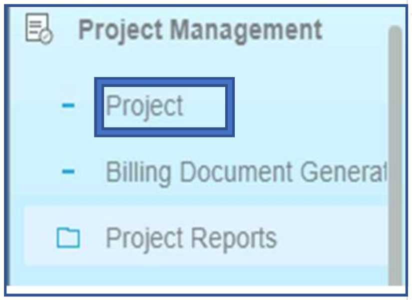


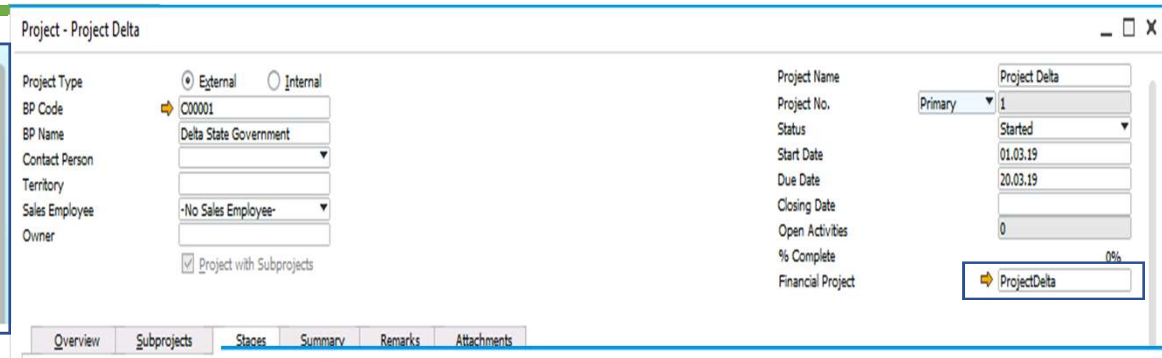


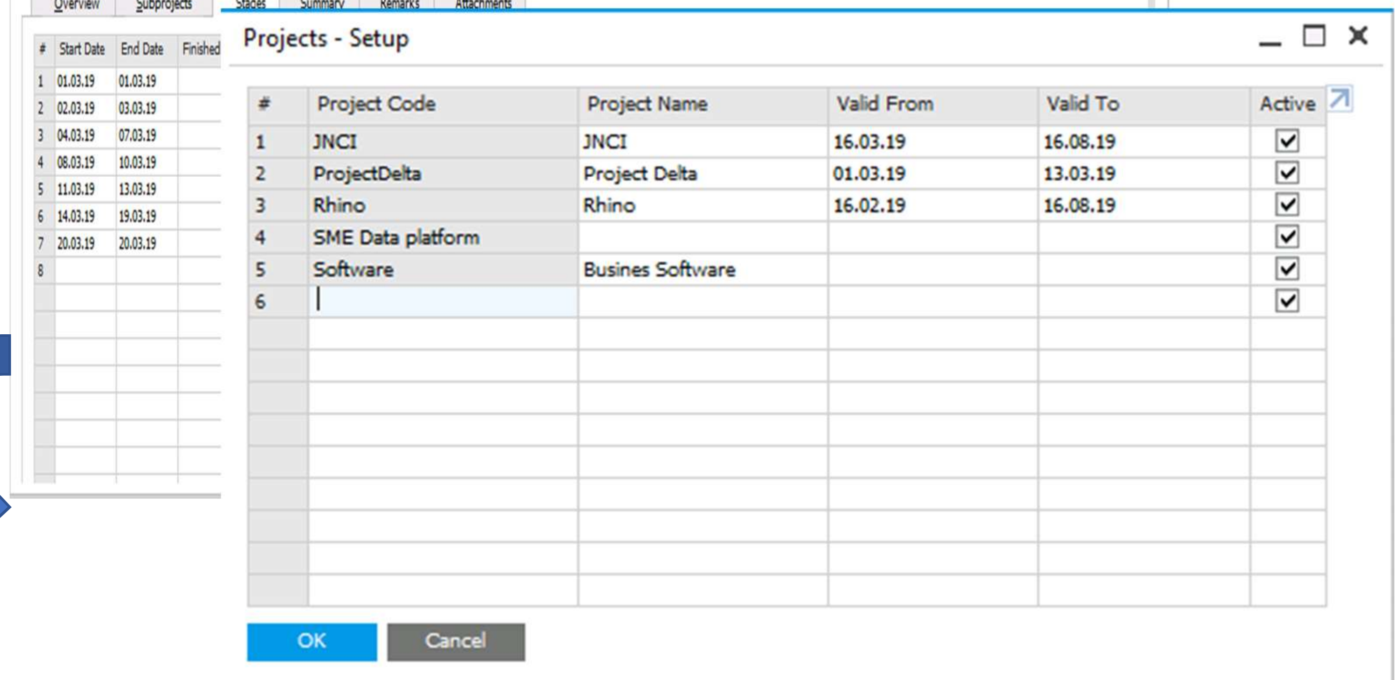
Steps;

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







Steps;

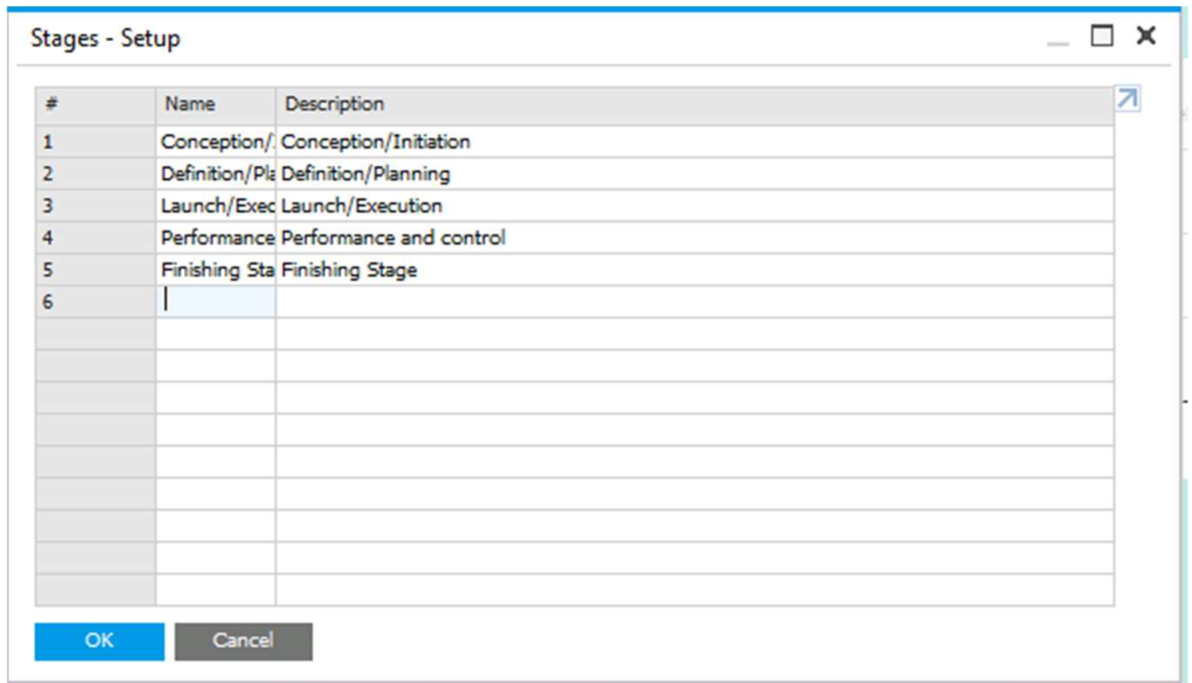
1. Add name of financial project
2. Select project
3. Add project name
4. Add Valid From and Valid To
5. Click on Active box
6. Click Update to add information

Set up Default Project Stages

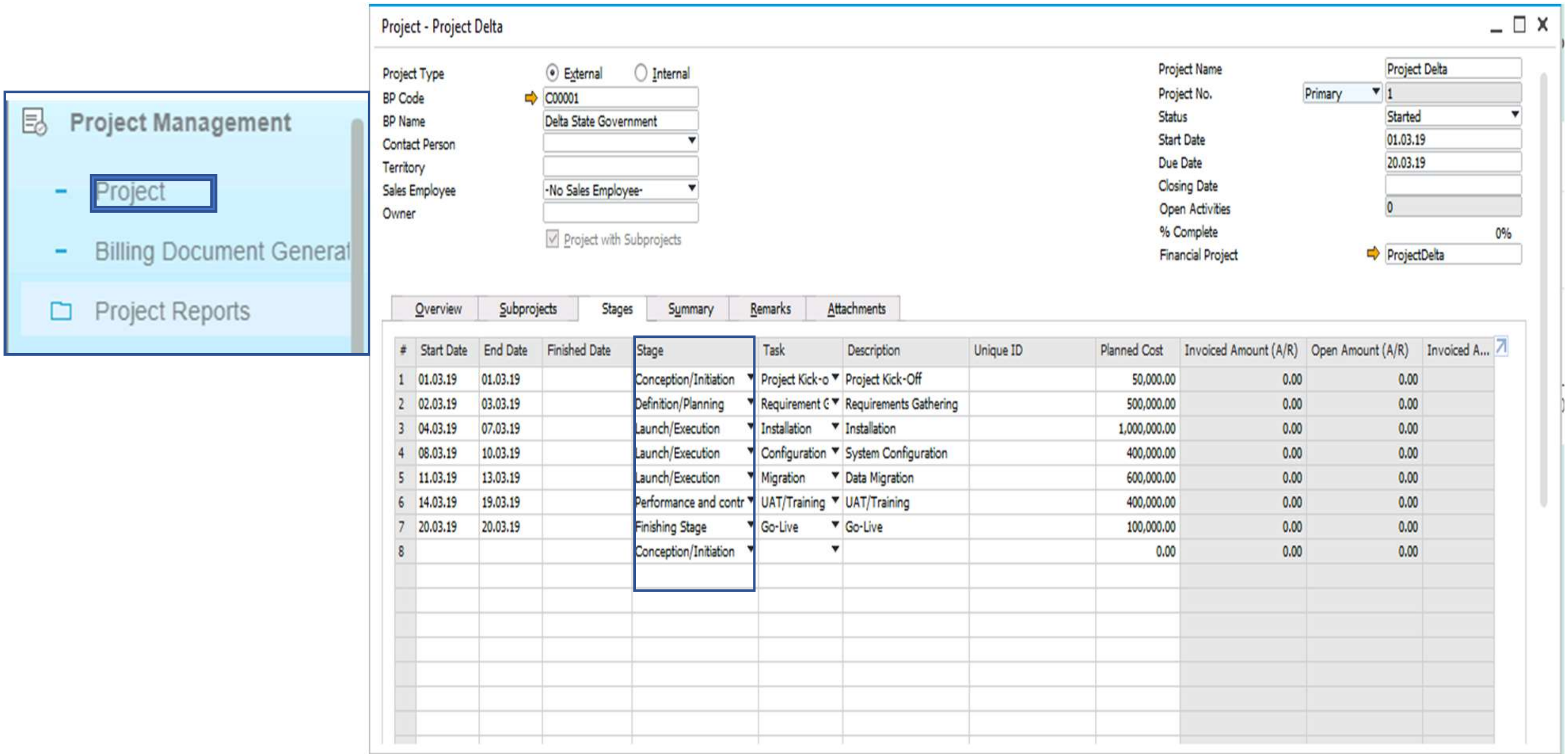
In the Main menu → Administration → Setup → Project management → Stages

Stages can be preconfigured in the Administration module
Steps;

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



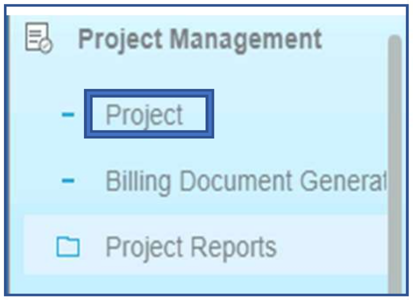
Project Master Data- Stages

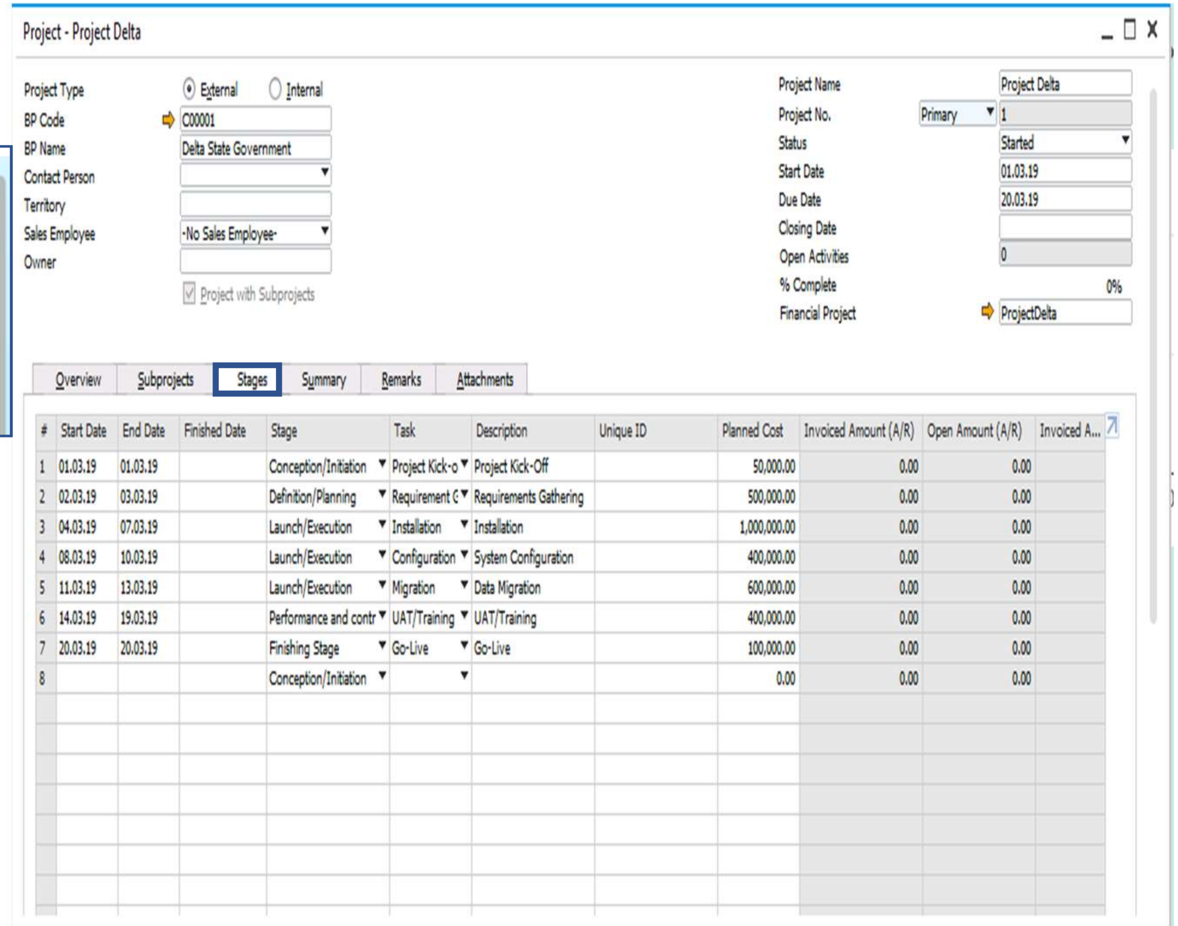


- Note: Project is composed of stages, each stage row holds a completion rate(rate of all stages amount to 100%)

Create Project Stages

Project Management →Project

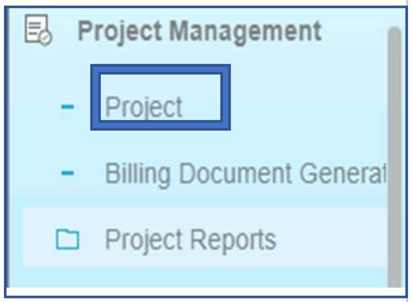


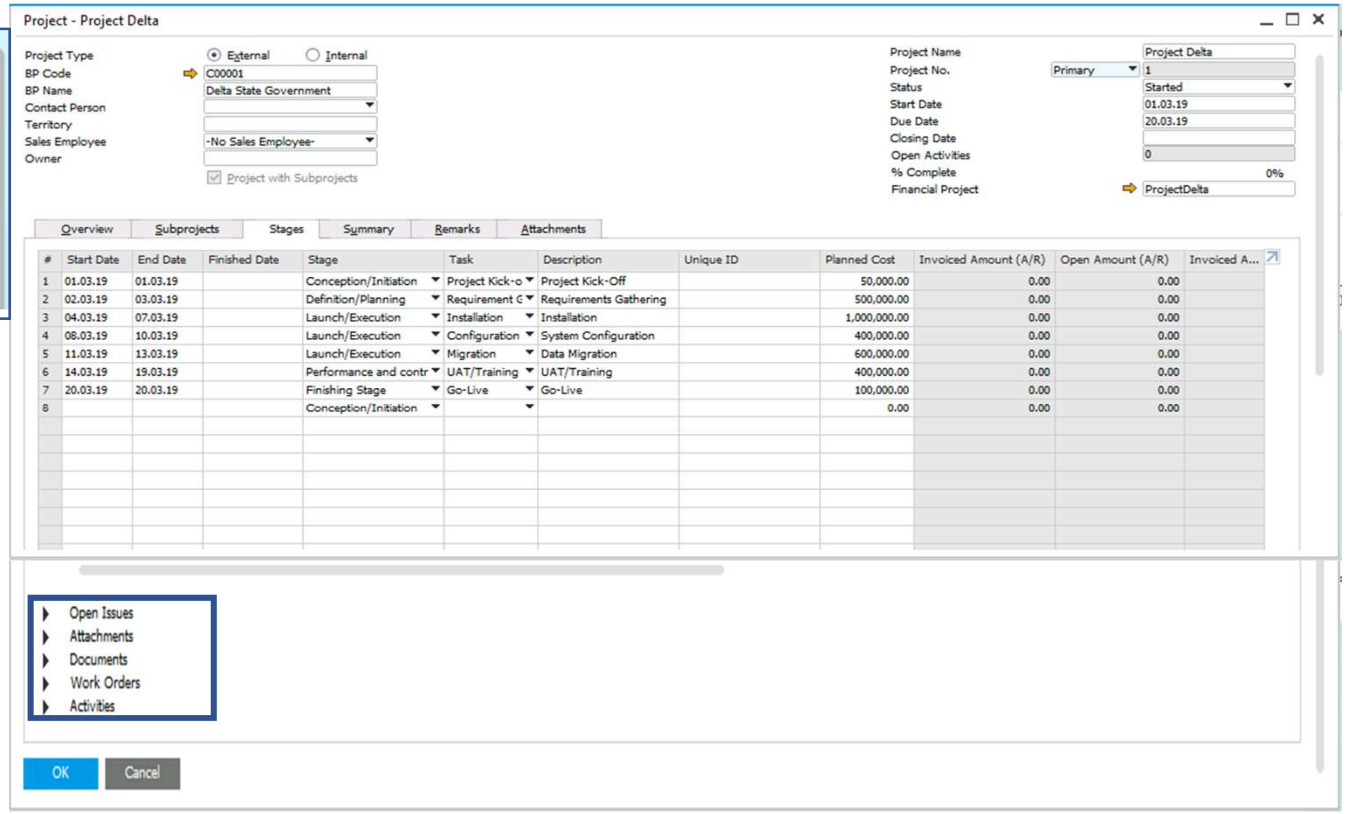


Steps;

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





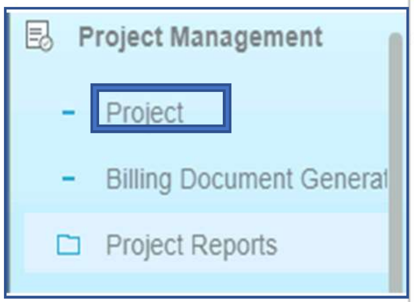
Steps;

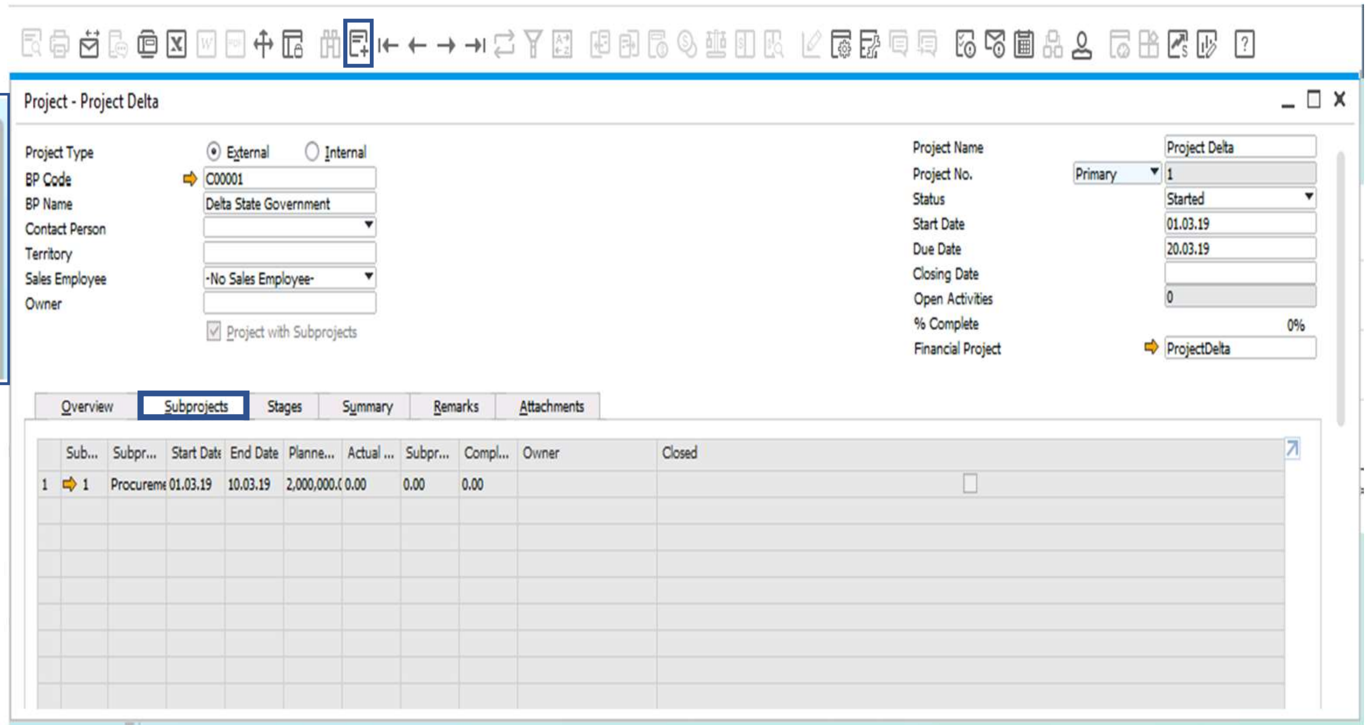
1. Select project

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



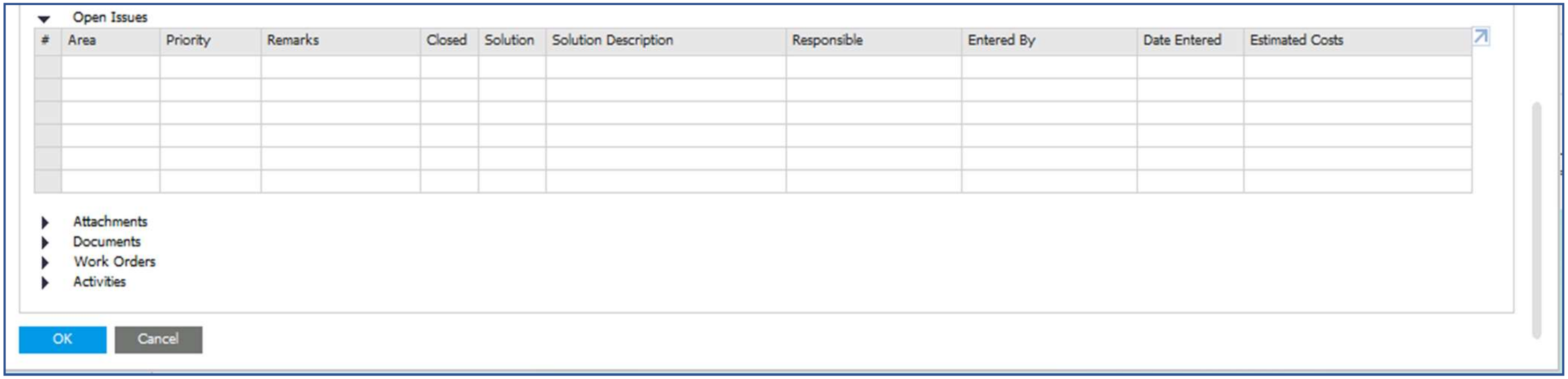


A subproject is treated as a sublevel project. One project can contain several subprojects, each of which can contain subprojects as well

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

Handling Open Issues



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

Steps;

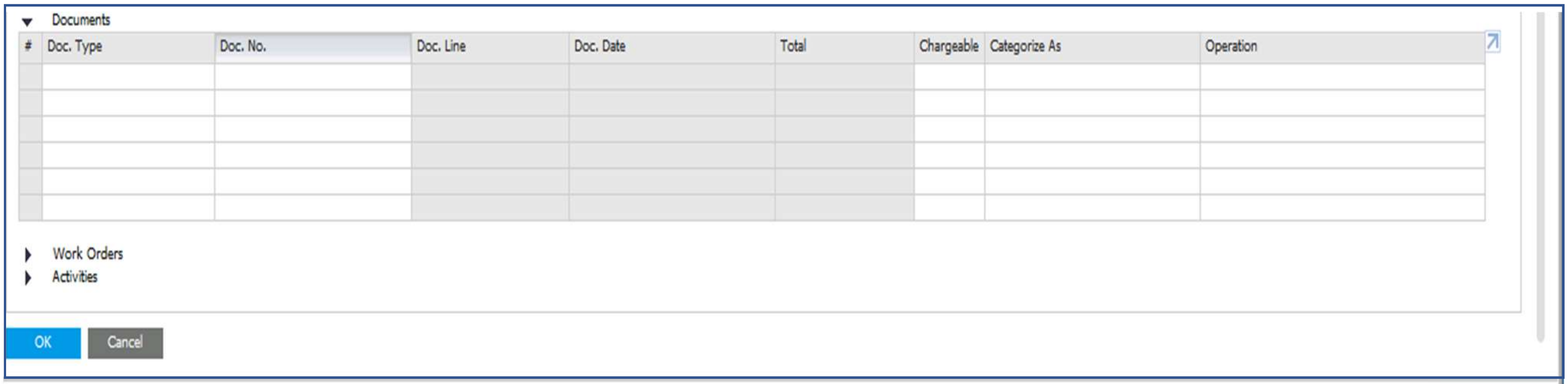
1. Select the drop down menu 

- 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



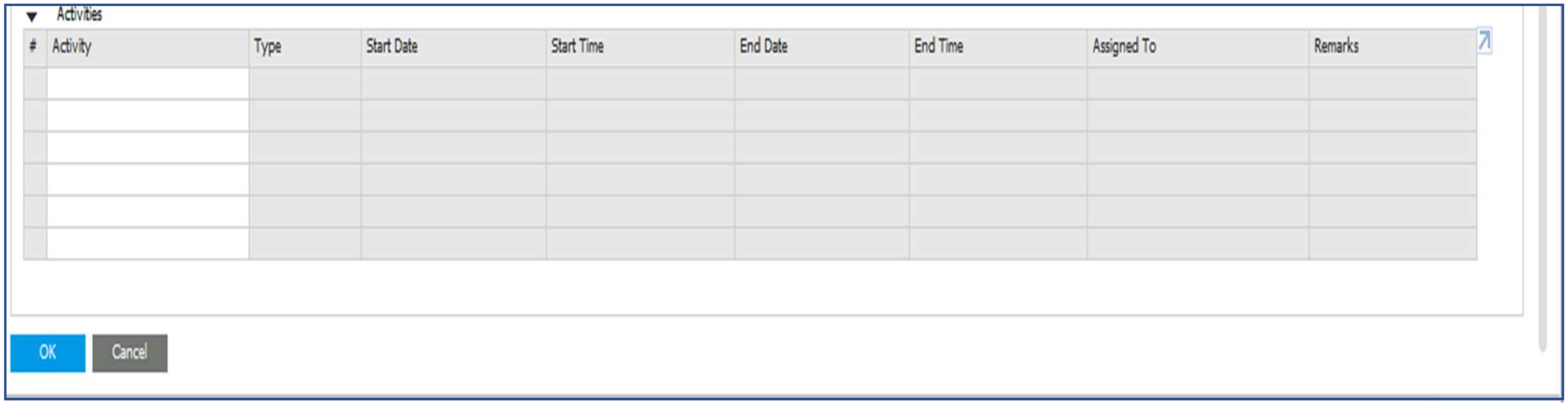
Connecting documents to a project stage

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



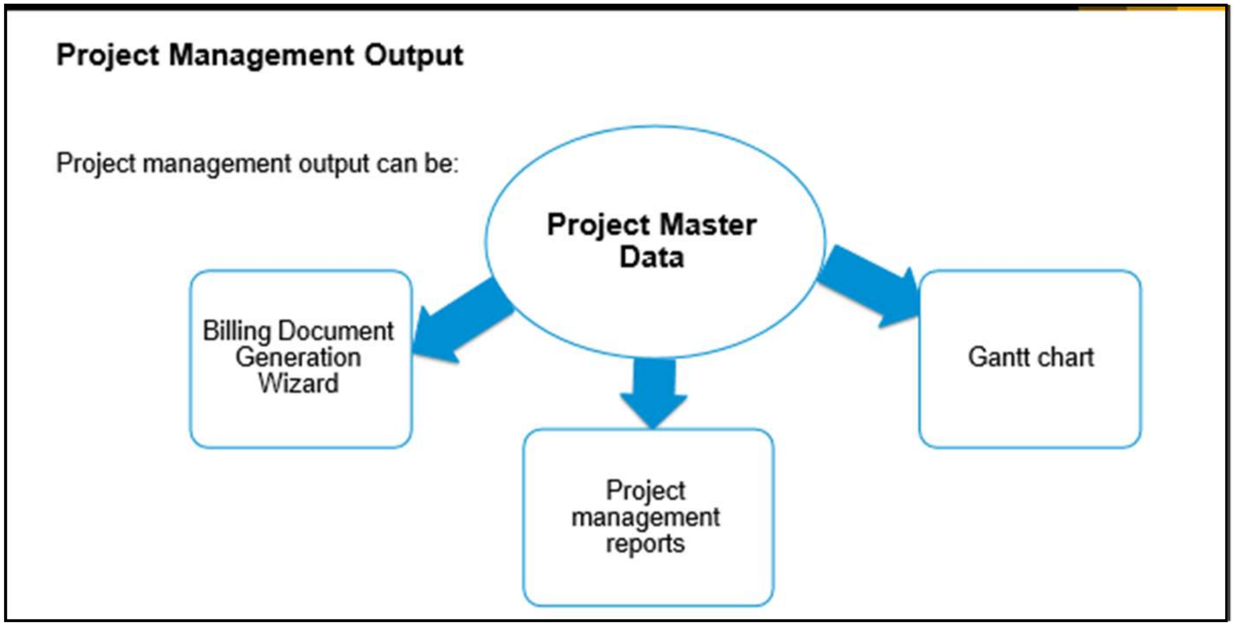
User can add an process related to the project i.e a meeting

Steps;

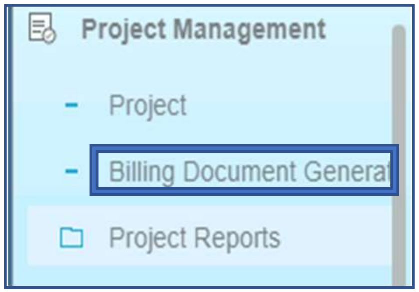
1. Activities added in the CRM can be copied to activity row in the project management module
2. Also, activities can added manually by filling the fields and clicking Update to save changes made.

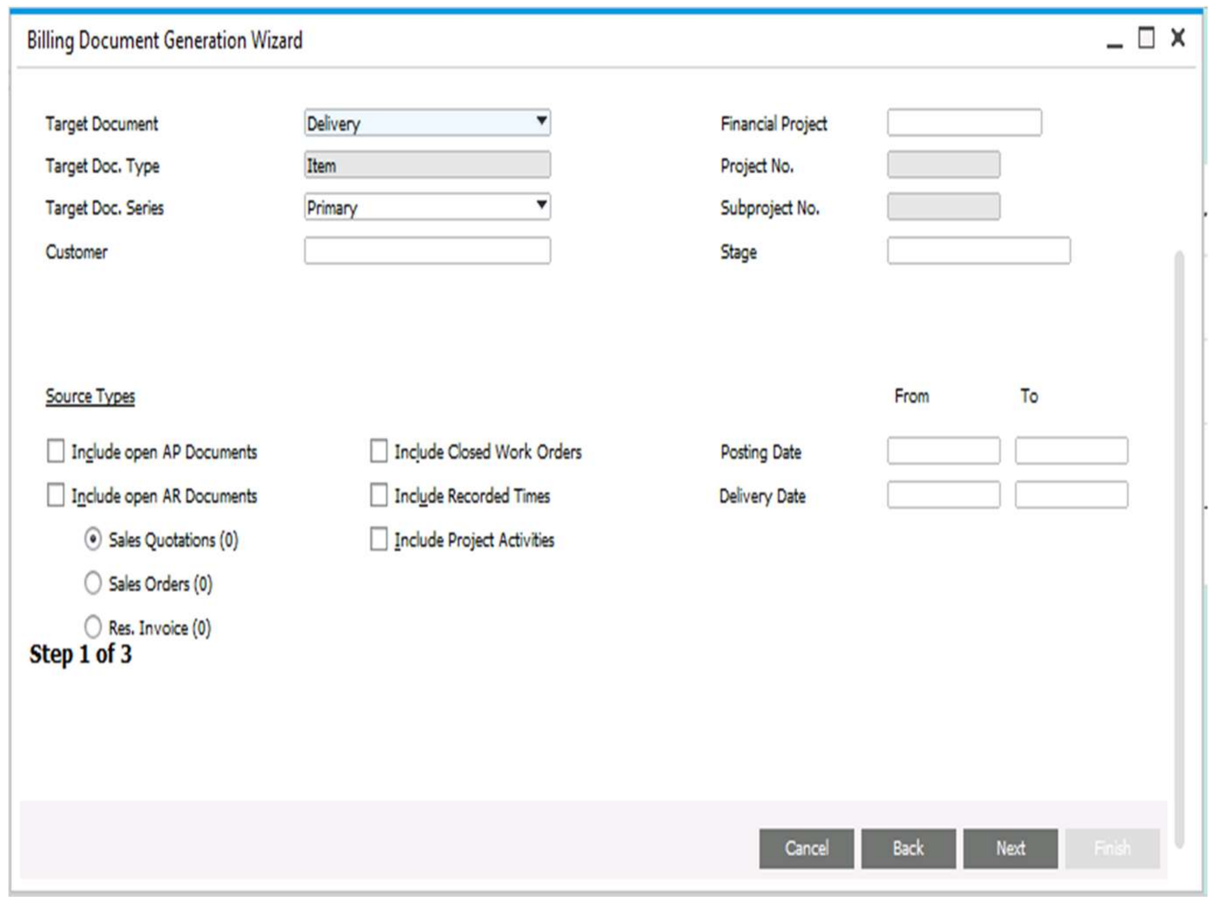
Note: An activity related to a project can be created directly from the CRM or Business Partner module. Once the project data is entered to the activity, it is automatically added to the relevant project stage.

Project management Output



Billing Document Generation Wizard



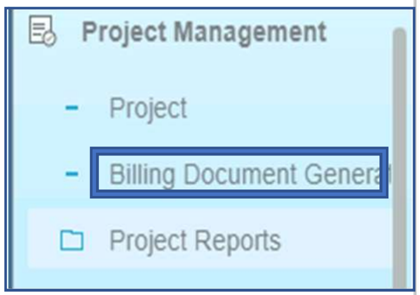


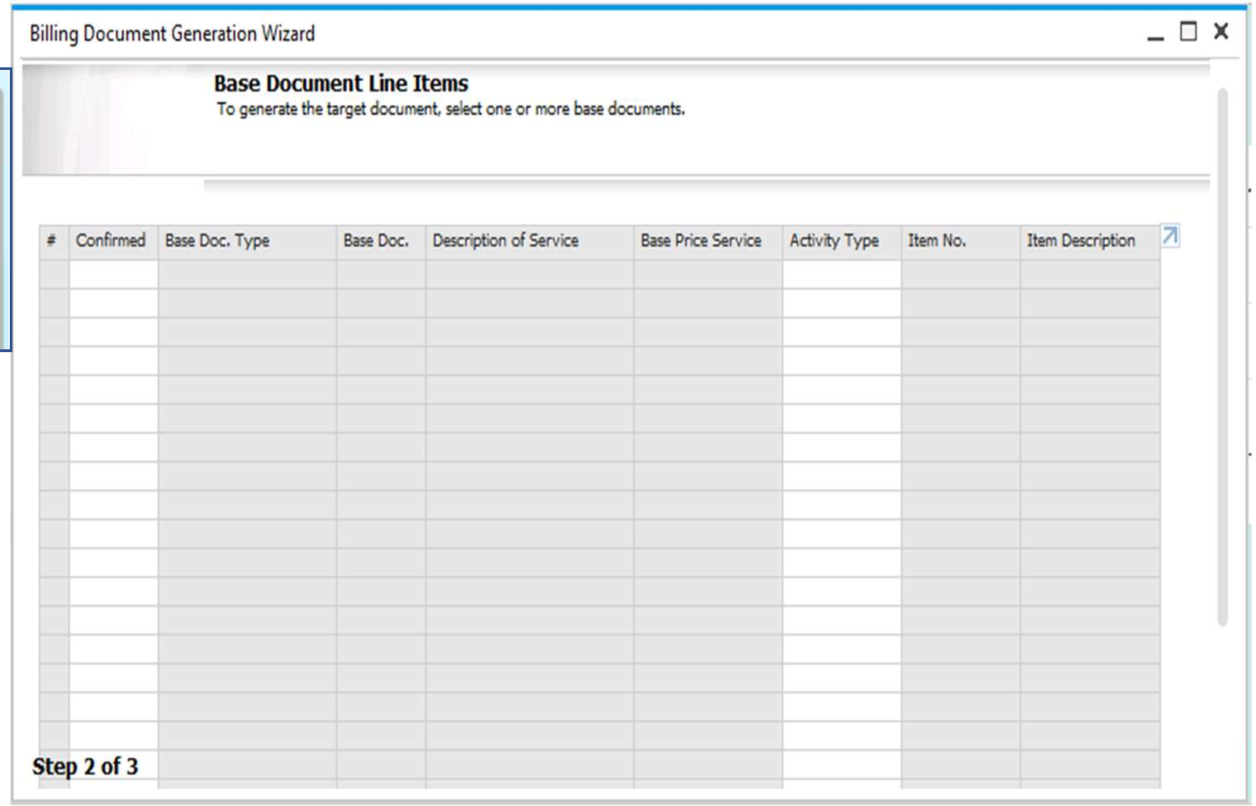
The wizard collects open documents and billable items connected to your project for invoicing through A/R Invoices or Deliver

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

Billing Document Generation Wizard



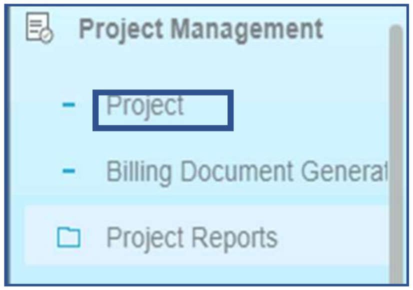


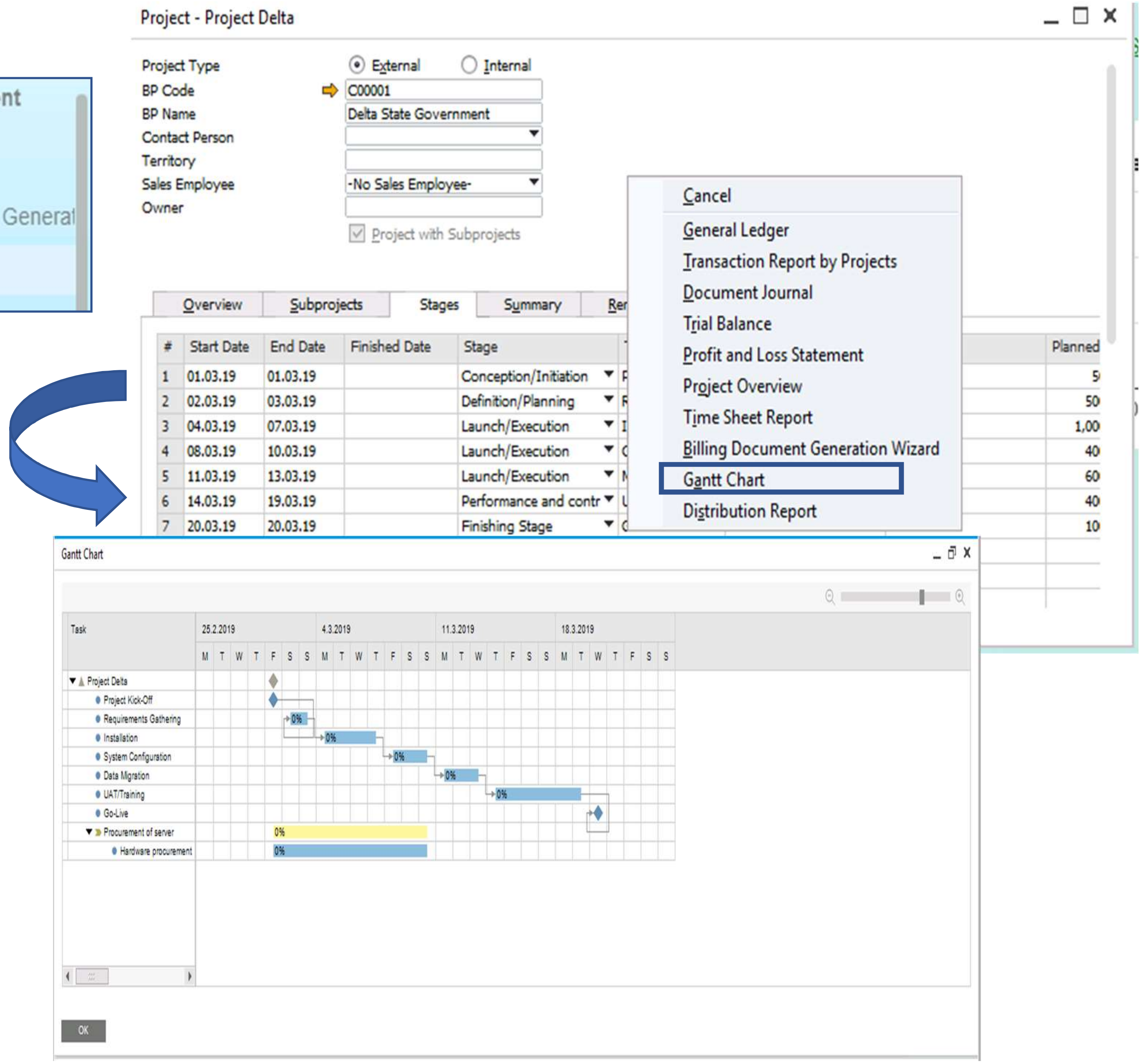
Confirm which documents you want to place on the target document

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

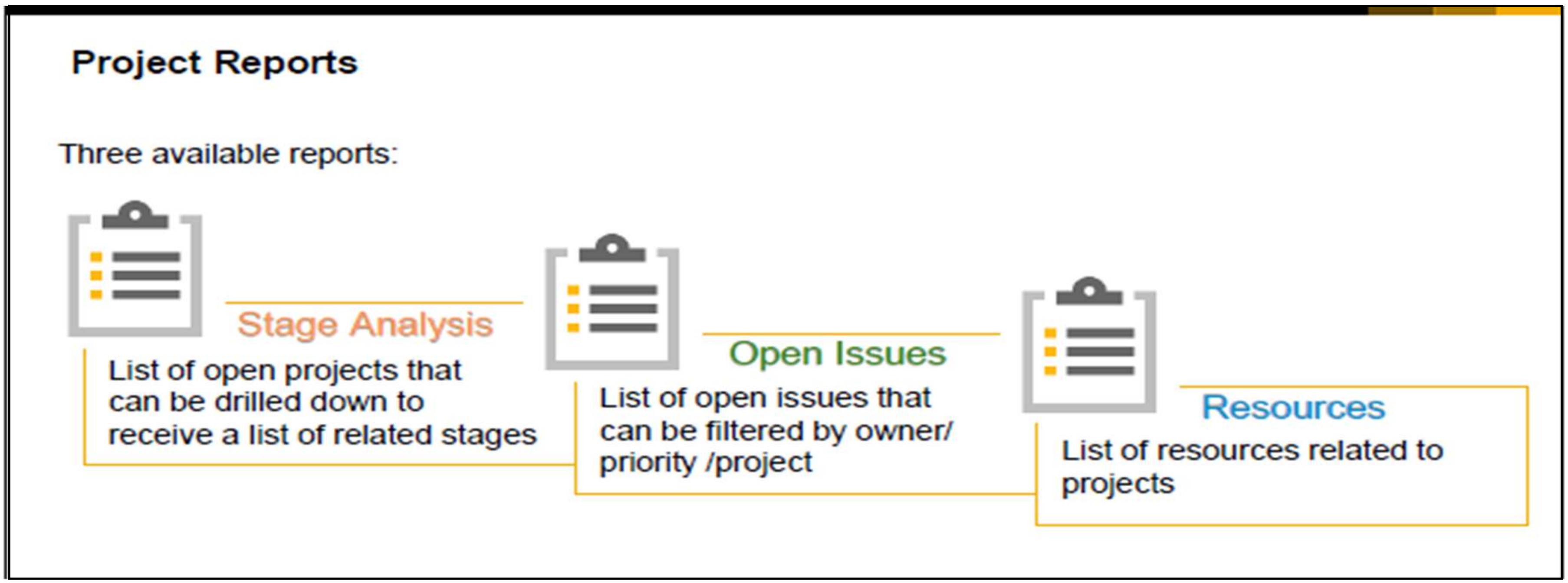




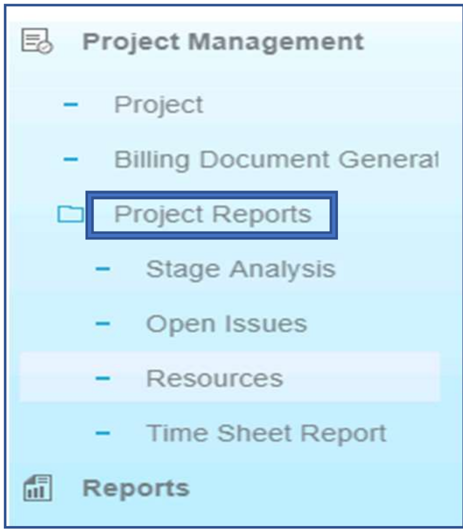
Steps;

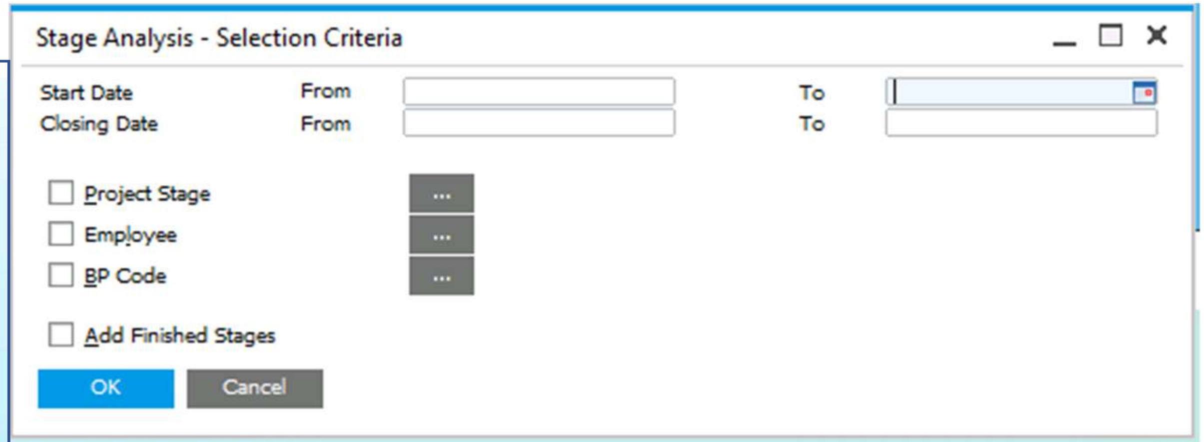
1. Right click on the active project window
2. Select Gantt Chart to generate the report

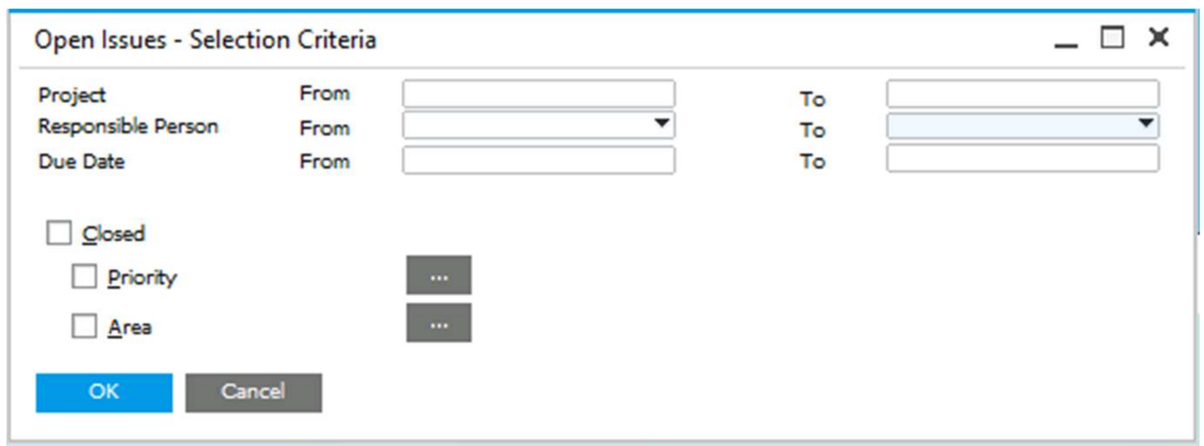
Project Reporting



Project Reporting





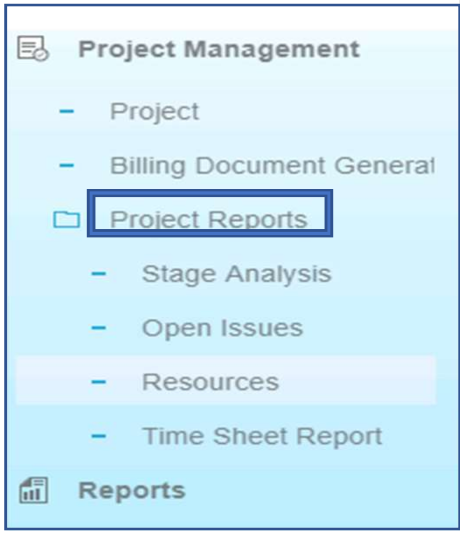


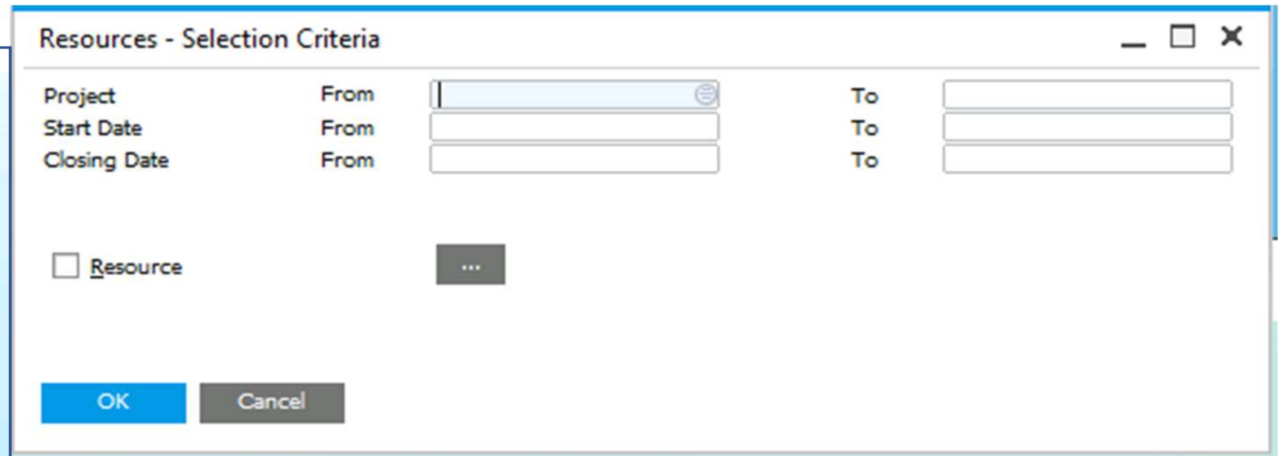
Steps;

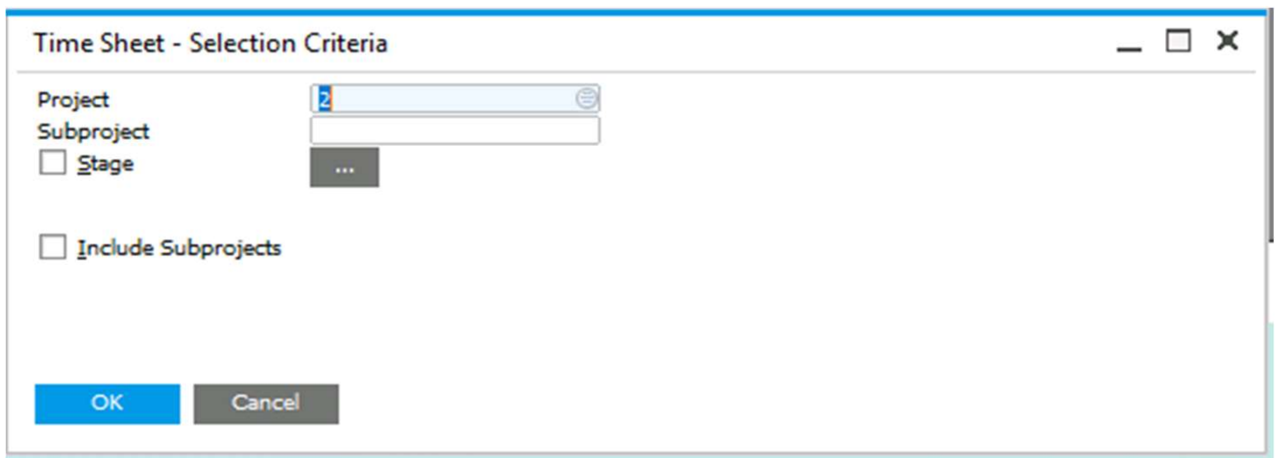
1. Select the project reports
2. Select desired project report

- Stage analysis
- Open issues

Project Reporting







Steps;

1. Select the project reports
2. Select desired project report

- Resources
- Time sheet

Rufus Alexander

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