



Project Management

SAP Business One 9.3



Project Management (1/3)



Project - Servers & Printer Installation

Project Type: External Internal
 BP Code: C23900
 BP Name: Parameter Technology
 Contact Person: Daniel Brown
 Territory:
 Sales Employee: Brad Thompson
 Owner:
 Project with Subprojects

Overview | Subprojects | Stages | Summary | Remarks

Risk Level: Medium
 Industry:
 Comments: This project is to install 2 new servers and 1 new printer for customer Parameter. This project will be phased out in 3 subprojects.

Subprojects	Task	Description	Work Order	Reso...	Activity	Start Date	Due Date	Progress (%)
1	Phase 1 - Server 1 In							
2	Phase 2 - Server 2 In							
3	Phase 3 - Printer Inst							

Context Menu:

- Cancel
- Sort Table
- General Ledger
- Transaction Report by Projects
- Document Journal
- Trial Balance
- Profit and Loss Statement
- Project Overview**
- Time Sheet Report

Project Overview Window:

Select Level: 2

Project / Subproject	Stage	Task	Description	Work Order	Reso...	Activity	Start Date	Due Date	Progress (%)
Servers & Printer Installation	Conception/Initiation	Meeting	Project Launch				01.07.16	05.10.16	4.000000
	Finishing Stage	Project	Project Close				05.10.16	05.10.16	0.0
Phase 1 - Server 1 Installati	Definition/Planning	Planning	Planning				05.07.16	30.07.16	10.000000
	Performance and co	Installati	Installation				11.07.16	15.07.16	0.0
	Performance and co	Monitori	Monitoring				15.07.16	28.07.16	0.0
Phase 2 - Server 2 Installati	Finishing Stage	Project	End of P						
	Definition/Planning	Planning	Planning						
	Performance and co	Installati	Installati						
	Performance and co	Monitori	Monitori						
	Finishing Stage	Project	End of P						

Time Sheet Report Window:

Project No.: 2 Project Name:
 Subproject No.: Subproject Name:
 Stage: Description:

Time Recording

#	Subpr...	Subproject Name	Stage	User/Employee	Date	St

Feature

- The context menu links to:
 - Project Overview form detailing the entire project and it's hierarchical structure in one table.
 - Time Sheet Report.
- Create stage dependencies across different project levels including subprojects.
- New column under Stages tab - *Finished Date* allows users to define an actual finish date of each stage which can be compared to the planned end date.
- A *Stage ID* field has been created to better link projects to marketing documents and employee time sheets.
- A new Time Sheet Report clearly displays the link between a project and time worked on the project by employee.
- Under Documents and Work Orders section, a new *Chargeable* tick box field indicates if a connected document line is chargeable to a customer.
- Additional project related information is added to the Activity form and users can also set an activity relevant for project billing.

Project Management (2/3)



Billing Document Generation Wizard

Initial Wizard Configuration
Please select the Target Document, Customer and other

Target Document: Delivery
Target Doc. Type: Item
Target Doc. Series: Primary
Customer: C20000

Financial Project: SPI-C23900
Project No.: 2
Subproject No.: 3
Stage: (2-3-1)

Source Types

<input checked="" type="checkbox"/> Include open AP Documents	<input checked="" type="checkbox"/> Include closed Work Orders
<input checked="" type="checkbox"/> Include open AR Documents	<input checked="" type="checkbox"/> Include Recorded Times
<input type="radio"/> Sales Quotations (0)	<input checked="" type="checkbox"/> Include Project Activities
<input type="radio"/> Sales Orders (0)	
<input type="radio"/> Res. Invoice (0)	

Posting Date: [] []
Delivery Date: [] []

Step 1 of 3

Cancel Back Next Finish

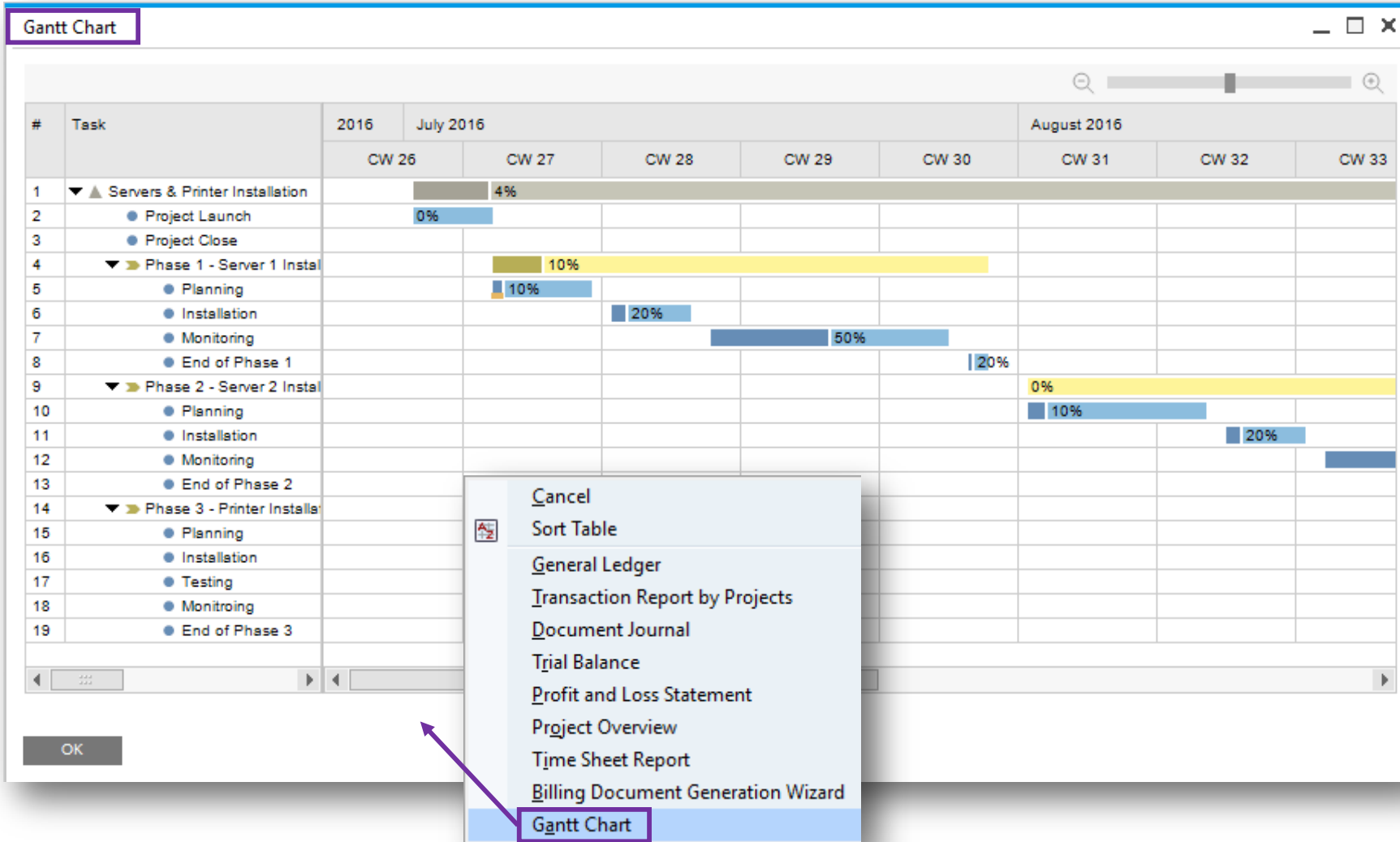
Feature

- New Billing Document Generation Wizard allows users to recharge costs or bill a project.
- The billing wizard collects open document lines and billable items connected to the project for invoicing.
- Creates AR Delivery or AR Invoice documents based on the project data stored in the Project Management form.

Benefit

- Users have a holistic overview of projects and detailed information related to each project.
- Increases productivity and transparency.
- The billing wizard streamlines the standard billing or milestone billing process and helps improve efficiency.

Project Management (3/3)



Feature

- Access a Gantt Chart via context menu in Project window.
- The Gantt Chart visualizes the project as a whole.

Benefit

- More transparency, increased productivity, and enhanced usability.

