

How-To Guide
SAP Business One 9.3 and SAP Business One 9.3, version
for SAP HANA
Document Version: 3.0 – 2020-12-02

PUBLIC

How to Work with Project Management in SAP Business One



Typographic Conventions

Type Style	Description
<i>Example</i>	Words or characters quoted from the screen. These include field names, screen titles, pushbuttons labels, menu names, menu paths, and menu options. Textual cross-references to other documents.
Example	Emphasized words or expressions.
EXAMPLE	Technical names of system objects. These include report names, program names, transaction codes, table names, and key concepts of a programming language when they are surrounded by body text, for example, SELECT and INCLUDE.
Example	Output on the screen. This includes file and directory names and their paths, messages, names of variables and parameters, source text, and names of installation, upgrade and database tools.
Example	Exact user entry. These are words or characters that you enter in the system exactly as they appear in the documentation.
<Example>	Variable user entry. Angle brackets indicate that you replace these words and characters with appropriate entries to make entries in the system.
EXAMPLE	Keys on the keyboard, for example, F2 or ENTER .

Document History

Version	Date	Change
1.0	2015-07-25	First Version for Release 9.2.
2.1	2017-08-16	Second Version Incorporating Changes in Release 9.3: Project Overview, Gantt Chart, Billing Wizard.
3.0	2020-12-02	Correction of editable status of field <i>Actual Cost</i> in section 4.3.4.

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1 Introduction

Use the Project Management module to manage your projects from start to finish, centralizing all project related transactions, documents, resources, and activities. The feature helps you to monitor the progress of tasks, stages, subprojects, analyze budget costs, and generate reports on various aspects of the project, such as stage analysis, open issues, and resources.

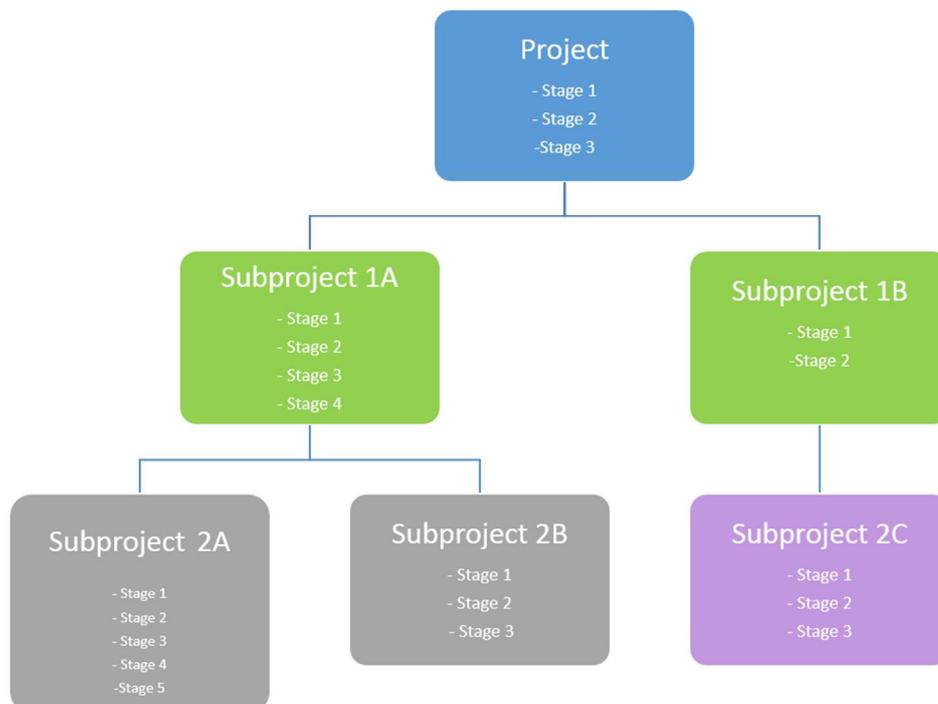
1.1 Overview of Hierarchical Structure of Project

A project comprises stages which contain one or more tasks. For each stage, you can manage open issues, documents, attachments, work orders, and activities. All this information is maintained in the *Project* window, where you can also view the financial information pertaining to the project.

A project can have only one level, or it can contain lower-level projects called subprojects. Subprojects can contain further subprojects underneath them, and so on, forming a hierarchical tree of subprojects, with the main project at the top level.

If a project contains a subproject, you can access it from the *Project* window. The information about the subproject is displayed in the *Subproject* window, which is similar in layout to the top-level *Project* window.

Below is a sample hierarchical structure of a project and its subprojects:



2 Prerequisites

2.1 Enabling the Project Management Feature

To enable the project management feature, use the procedure below.

Procedure

1. From the *Main Menu*, choose *Administration* → *System Initialization* → *Company Details*.
2. On the *Basic Initialization* tab, select the *Enable Project Management* checkbox.
3. Choose *Update*.

The screenshot shows the 'Company Details' dialog box with the 'Basic Initialization' tab selected. The 'Enable Project Management' checkbox is checked and highlighted with a red box. Other settings include 'Chart of Accounts Template' set to 'US_CoA', 'Local Currency' and 'System Currency' set to 'US Dollar', and 'Default Account Currency' set to 'All Currencies'. The 'House Bank' section shows 'Default Bank Country' as 'USA', 'Default Bank' as 'Bank of New York', 'Default Account No.' as '145-4267-6703', and 'Default Branch' as 'Main'. The 'Calculate Depreciation By' dropdown is set to 'Month'.

Field	Value
Chart of Accounts Template	US_CoA
Local Currency	US Dollar
System Currency	US Dollar
Default Account Currency	All Currencies
Item Groups Valuation Method	Moving Average
Default Bank Country	USA
Default Bank	Bank of New York
Default Account No.	145-4267-6703
Default Branch	Main
Calculate Depreciation By	Month

3 Initial Settings

3.1 Defining Stages

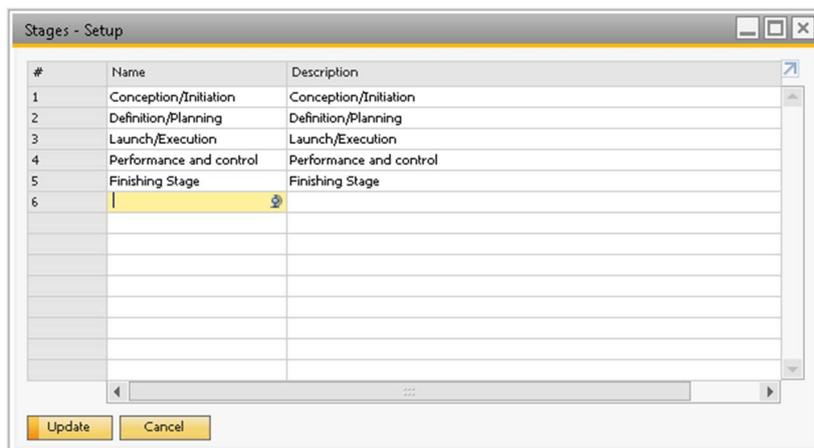
SAP Business One provides five predefined project stages:

1. Conception/Initiation
2. Definition/Planning
3. Launch/Execution
4. Performance and Control
5. Finishing Stage

You can rename a stage, add a new stage, or remove a stage.

Procedure

1. From the *Main Menu*, choose *Administration* → *Setup* → *Project Management* → *Stages*.



2. On the *Stages - Setup* window, you can do the following:
 - Rename a stage, by selecting the desired field and entering a new name or description.
 - Add a new stage, by right-clicking the first column of the row where you want to add a stage and choosing *Add Row*. Then specify the name and the description of the stage.
 - Delete a stage, by right-clicking the first column of the stage you want to delete and choosing *Delete Row*.
3. Choose *Update* to save your changes,

4 Defining Projects

All information about your projects is centralized in the *Project* window, as displayed below. From here you can set and access information about your projects.

Subprojects	Fulfillment	Status
-------------	-------------	--------

In the header area, you specify general information about the project. Further information is maintained on the following tabs: *Overview*, *Subprojects* (if the project consists of subprojects), *Stages*, *Summary*, *Remarks*, and *Attachments*. To access the *Project* window, choose *Project Management* → *Projects* from the *Main Menu*,

To define aspects of a project, follow the procedures below:

4.1 Defining the Header Area

Procedure

1. In the header area, specify the fields as described below:

 Note

Some self-explanatory fields are not described in the table.

Field/Checkbox	Activity/Description
<i>Project Type</i>	Select one of the radio buttons: <ul style="list-style-type: none"> <i>External</i> - the project is created for a business partner. <i>Internal</i> - the project is created for your company.
<i>BP Code</i>	 Note This field is relevant only if the project type is External. From the choose from list, select the relevant business partner.
<i>Contact Person</i>	 Note This field is relevant only if the project type is External. Displays the default contact person, as defined in the BP master data. You can select a different contact person.
<i>BP Territory</i>	From the choose from list, select the territory. The territories available in the list are those that are defined in the <i>Territories - Setup</i> window (<i>Administration</i> → <i>Setup</i> → <i>General</i> → <i>Territories</i>).
<i>Sales Employee</i>	From the choose from list, select the relevant sales employee.
<i>Owner</i>	From the choose from list, select the relevant employee.
<i>Project with Subprojects</i>	Select this checkbox if the project consists of subprojects. As a result, an additional tab <i>Subprojects</i> appears in the <i>Project</i> window.
<i>Project Name</i>	Specify the name of the project, this field is mandatory.
<i>Project No.</i>	Displays the project number automatically.
<i>Status</i>	Select one of the following to characterize the status of the project: <ul style="list-style-type: none"> <i>Started</i> <i>Paused</i> <i>Stopped</i> <i>Finished</i>  Note If you select <i>Stopped</i> or <i>Finished</i> , the current date is automatically entered as the closing date.
<i>Start Date</i>	Specify the start date of the project.
<i>Due Date</i>	Specify the planned end date of the project.
<i>Closing Date</i>	Once the project is finalized, enter the date of its closure. You can update this field later if needed.
<i>Open Activities</i>	Displays the number of open activities linked to all stages.

Field/Checkbox	Activity/Description
<i>Completeness %</i>	Displays the percentage of completeness of the project. For information on how completeness is calculated, see 4.1.1 Calculating Completeness of Projects or Subprojects.
<i>Financial Project</i>	From the choose from list, select a financial project which is linked to the project.

- To save the project, choose *Add*.

4.1.1 Calculating Completeness of Projects or Subprojects

The completeness of a project (or subproject) is calculated based on the contribution of its stages and its subprojects.



Example

A project has one stage and one subproject. The contribution of the stage to the project is 50% and the contribution of the subproject to the project is 50% as well.

The stage is finished, hence this contributes 50% towards completeness.

The subproject has stages and subprojects, and is 50% complete. Hence, this adds another 25% to the project's completeness.

The 50% from the stage and 25% from the subproject means the completeness is currently 75%.

Once the subproject is 100% complete, the project is 100% complete as well.

4.2 Defining the Overview Tab

Procedure

- On the *Overview* tab, specify the following fields:

Field/Checkbox	Activity/Description
<i>Risk Level</i>	Select the appropriate risk level: <ul style="list-style-type: none"> <i>Low</i> <i>Medium</i> <i>High</i>
<i>Industry</i>	From the dropdown list, select an existing industry, or define a new one.

- To save the changes, choose *Update*.

The screenshot shows the 'Project' dialog box with the following details:

- Project Type:** External (selected), Internal
- BP Code:** Customer01
- BP Name:** ABCDE Networks
- Contact Person:** Jane Smith
- Territory:**
- Sales Employee:** -No Sales Employee-
- Owner:**
- Project with Subprojects
- Project Name:** Project01
- Project No.:** 1
- Status:** Primary
- Start Date:** 22.10.2015
- Due Date:** 31.03.2016
- Closing Date:**
- Open Activities:** 1
- % Complete:** 20%
- Financial Project:** FinPro01

The 'Overview' tab is selected, showing a table with the following data:

Subprojects	Fulfillment	Status
1 -> SP01	0,000 %	Open
2 -> SP01	0,000 %	Open

In the table on the *Overview* tab, if the project does not contain subprojects, the system lists all tasks relevant to the project, their hierarchy, fulfillment, and status. If the project has subprojects, it lists subprojects. You can access any task or subproject by selecting  (*Link Arrow*) in the relevant row.

4.3 Defining Subprojects Tabs

i Note

This tab is visible only if the *Project with Subprojects* checkbox in the header area is selected.

The screenshot shows the SAP Project window with the 'Subprojects' tab selected. The header area contains the following information:

- Project Type: External Internal
- BP Code: Customer01
- BP Name: ABCDE Networks
- Contact Person: Jane Smith
- Territory: [Empty]
- Sales Employee: -No Sales Employee-
- Owner: [Empty]
- Project with Subprojects

Project Details:

- Project Name: Project01
- Project No.: 1
- Status: Primary
- Status: Started
- Start Date: 22.10.2015
- Due Date: 31.03.2016
- Closing Date: [Empty]
- Open Activities: 1
- % Complete: 0%
- Financial Project: FinPro01

The Subprojects table has the following columns: Subproj..., Subproj..., Start Date, End Date, Planned Cost, Actual Cost, Subproject..., Completeness %, Owner, Closed.

Subproj...	Subproj...	Start Date	End Date	Planned Cost	Actual Cost	Subproject...	Completeness %	Owner	Closed
1	1	SP01	31.10.2015	0,00	0,00	100,0000	0,0000	Smith, John	<input type="checkbox"/>

Buttons at the bottom: OK, Cancel, Add New Subproject

On this tab, you can assign subprojects to the project, that is, you can create subprojects that are on the hierarchy level directly below the project.

4.3.1 Adding Subprojects

Procedure

1. On the *Subprojects* tab, choose the *Add New Subproject* option to open a *Subproject* window. Ensure the form is in add mode.

i Note

The *Subproject* window is similar to the *Project* window. It shows similar information in the header area and contains the *Subprojects*, *Stages*, and *Summary* tabs, which you define in the same way as the tabs in the main *Project* window. A subproject is treated as a sublevel project. One project can contain several subprojects, each of which can contain subprojects as well.

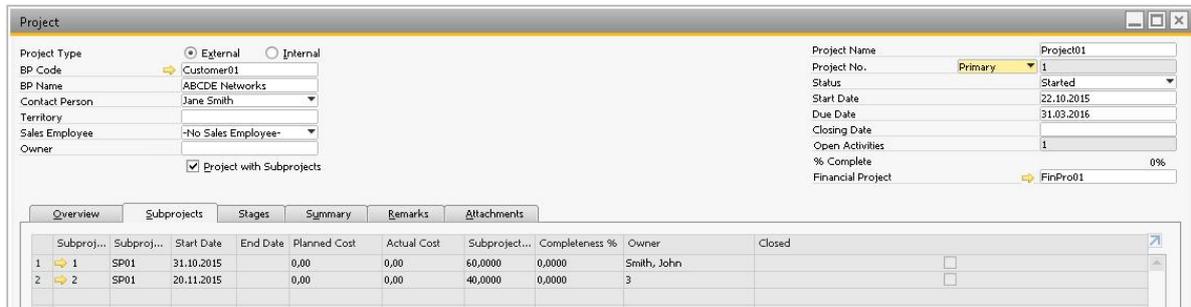
2. Define the information about the subproject and choose *Add*.

The *Subproject* window closes and the subproject is added on the *Subprojects* tab. Basic information from the subproject is copied on the row.

Note

For detailed information about the *Subproject* window, see 4.3.4 Defining the Subproject Window.

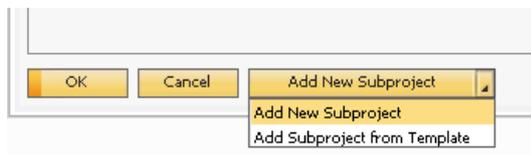
- To save the changes, choose *Update*.



4.3.2 Adding Subprojects from Templates

Procedure

- Extend the *Add New Subproject* button, and choose *Add Subproject from Template*.



- A list of all existing subprojects appears.
- Select the desired subproject and select *Choose*.
- The subproject is added on the *Subprojects* tab. All stages and subprojects from the template are copied into the subproject you have just added.
- Choose *Update*.

4.3.3 Deleting Subprojects

Procedure

- Right-click the subproject row you want to delete and choose *Remove Subproject*.
- Choose *Update*.

4.3.4 Defining the Subproject Window

Procedure

1. After you have accessed the *Subproject* window from the upper-level *Project* window (or the upper-level *Subproject* window), view or specify the following fields in the header area:

Field/Checkbox	Description/Activity
<i>Subproject No.</i>	The number of the subproject.
<i>Start Date</i>	The date from which the subproject is active for planning.
<i>End Date</i>	The date when the subproject is ending for planning.
<i>Finished Date</i>	The official date when the subproject was finished.
<i>Due Date</i>	The estimated date when the subproject should be completed.
<i>Planned Cost</i>	Estimated cost of the subproject.
<i>Actual Cost</i>	This field is editable. The system displays the sum of the total amounts of the A/P invoices linked to the subproject.
<i>Subproject Contribution %</i>	Enter the percentage of the subproject's contribution to the next upper-level project or subproject.
<i>Completeness %</i>	Displays in percentages what portion of the subproject has been finished.

Field/Checkbox	Description/Activity
	<p>If a subproject does not have subprojects, this value is calculated based on the contribution percentage of each finished stage.</p> <p>If a contribution has subprojects, this value is a sum of contribution percentages of each finished stage of the current subproject and the contribution percentages of its subprojects.</p>
<i>Finished</i>	Checkbox.
<i>Owner</i>	Specify the owner of the subproject.

- The tabs in the *Subproject* window are the same as in the *Project* window. You manage the information on the tabs in the same way as you manage it in the *Project* window. For details, refer to the following sections:
 - Subprojects* tab - See 4.3 Defining Subprojects Tab.
 - Stages* tab - See 4.4 Defining the Stages Tab.
 - Summary* tab - See 4.5 Information on the Summary Tab.
- To add the subproject, choose *Add*.

4.4 Defining the Stages Tab

On this tab, you can specify tasks to build up your project stages. More than one task can be related to a stage. Here you also maintain open issues, attachments, documents, work orders and activities.

When you highlight a row in the table, the sections below the main table (*Open Issues*, *Attachments*, *Documents*, *Work Orders*, and *Activities*) contain information related to the stage in the selected row. To view and manage the information in a section, expand it by selecting **▶** (*Expand*).

The screenshot shows the SAP Project Management 'Project' window with the 'Stages' tab selected. The window is divided into several sections:

- Project Details:** Includes fields for Project Type (External/Internal), BP Code, BP Name, Contact Person, Territory, Sales Employee, and Owner. It also shows Project Name, Project No., Status, Start Date, Due Date, Closing Date, Open Activities, % Complete, and Financial Project.
- Stages Table:** A table with columns: #, Position, Start Date, End Date, Stage, Task, Description, Planned Cost, Invoiced Amount (A/R), Open Amount (A/R), Invoiced Amount (A/D), and Open Amount (A/D). The first row is highlighted in red.
- Expanded Sections:** Below the table, several sections are expanded with a red box:
 - Open Issues:** Shows a table with columns: #, Doc. Type, Doc. No., Doc. Line, Doc. Date, and Total. The first row is highlighted in red.
 - Attachments:** Shows a table with columns: #, Doc. Type, Doc. No., Doc. Line, Doc. Date, and Total. The first row is highlighted in red.
 - Documents:** Shows a table with columns: #, Doc. Type, Doc. No., Doc. Line, Doc. Date, and Total. The first row is highlighted in red.
 - Work Orders:** Shows a table with columns: #, Doc. Type, Doc. No., Doc. Line, Doc. Date, and Total. The first row is highlighted in red.
 - Activities:** Shows a table with columns: #, Doc. Type, Doc. No., Doc. Line, Doc. Date, and Total. The first row is highlighted in red.

To define stage related tasks on the *Stages* tab, follow the procedure below.

Procedure

1. Specify the following fields where required:

Field/Checkbox	Activity/Description
<i>Position</i>	Displays the position of the stage in the table.
<i>Start Date</i>	Specify the start date of the stage for planning.
<i>End Date</i>	Enter the closing date of the stage for planning.
<i>Finished Date</i>	Actual finish date. Populated with the current date when the <i>Finished</i> checkbox is selected, but can be amended.
<i>Stage</i>	Select a stage as defined in the <i>Stages - Setup</i> window.
<i>Task</i>	From the dropdown menu, select an existing task type or create a new one.
<i>Description</i>	Enter the description of the task.
<i>Unique ID</i>	Can be given a name, can be linked to directly from marketing documents.
<i>Planned Cost</i>	Enter the planned or expected cost of the task. This amount is used as a reference only.
<i>Invoiced Amount (A/R)</i>	Displays the total amount of all open A/R invoices that are linked to the relevant financial project and the stage.
<i>Open Amount (A/R)</i>	Displays the total amount of all open A/R documents except A/R invoices which are connected to the project and the stage.
<i>Invoiced Amount (A/P)</i>	Displays the total amount of all open A/P invoices that are linked to the relevant financial project and the stage.
<i>Open Amount (A/P)</i>	Displays the total amount of all open A/P documents except A/P invoices which are connected to the project and the stage.
<i>Contribution %</i>	Displays the contribution percentage of the stage to the project. The sum of all stage contribution percentages and any subproject contribution percentages cannot exceed 100.
<i>Finished</i>	To close the stage, select this checkbox. If there are open activities or issues related to the stage, you cannot close it.
<i>Owner</i>	Select the owner of the stage.
<i>Stage Dependence (1)</i>	<p>Specify if finishing the stage is dependent on finishing one or more other stages. If a stage is dependent on another stage, it means that you cannot finish the stage until the stage it is dependent on is finished.</p> <p> Note</p> <p>A stage can be dependent on a subproject.</p>
<i>Stage Dependence (2)</i>	
<i>Stage Dependence (3)</i>	
<i>Stage Dependence (4)</i>	
<i>Stage Dependence (5)</i>	

4.4.1 Stages Tab - Defining Open Issues

Procedure

1. To define a new open issue, specify the following fields:

Field/Checkbox	Activity/Description
<i>Area</i>	From the dropdown menu, select an existing area or define a new one.
<i>Priority</i>	Define the priority of the issue.
<i>Remarks</i>	Enter remarks about the issue.
<i>Closed</i>	Select the checkbox once the issue is resolved and closed. You cannot mark a stage as Finished if there are linked open issues or if
<i>Solution</i>	Enter text describing the solution.
<i>Responsible</i>	Select the person responsible.
<i>Estimated Costs</i>	Enter the estimated costs of resolving the issue.

2. To save the changes, choose *Update*.

#	Area	Priority	Remarks	Closed	Solution	Solution Description	Responsible	Entered By	Date Entered	Estimated Costs
1	Premises		Deco	<input type="checkbox"/>		Itba	Smith, John	Smith, John	31.10.2015	80,00
2	Catering	high		<input type="checkbox"/>			Smith, John	Smith, John	31.10.2015	400,00
3				<input type="checkbox"/>						0,00

4.4.2 Stages Tab - Adding Attachments

In this section, you can add attachments relevant to the stage.

Procedure

To add an attachment, double-click the first blank row, browse to the location where the file is stored and choose *Open*.

Note

- o To open an existing attachment, double-click it.
- o To delete an existing attachment, right-click the relevant row and choose *Delete Row*.

4.4.3 Stages Tab - Adding Documents

In this section, you can link existing documents to the selected stage.

Note

You can assign documents that are linked to any financial project.

Procedure

1. To add a document, specify the following fields:

Field/Checkbox	Activity/Description
<i>Doc. Type</i>	Select one of the following options: <ul style="list-style-type: none"> • <i>Manual Journal Entry</i> • <i>Sales Quotation</i> • <i>Sales Order</i> • <i>Delivery</i> • <i>Return</i> • <i>A/R Down Payment Request</i> • <i>A/R Down Payment Invoice</i> • <i>A/R Invoice</i> • <i>A/R Credit Memo</i> • <i>A/R Reverse Invoice</i> • <i>Purchase Quotation</i> • <i>Purchase Order</i> • <i>Goods Receipt PO</i> • <i>Goods Return</i> • <i>A/P Down Payment Request</i> • <i>A/P Down Payment Invoice</i> • <i>A/P Invoice</i> • <i>A/P Credit Memo</i> • <i>A/P Reserve Invoice</i> • <i>Service Call</i> • <i>Goods Receipt</i> • <i>Goods Issue</i> You can also select a correction document, such as <i>Correction Invoice</i> .
<i>Document No.</i>	From the choose-from list, select the desired document.
<i>Chargeable</i>	Select the checkbox if the document is chargeable to the client.

2. The information in the remaining fields is copied from the selected document.
3. To save the changes, choose *Update*.

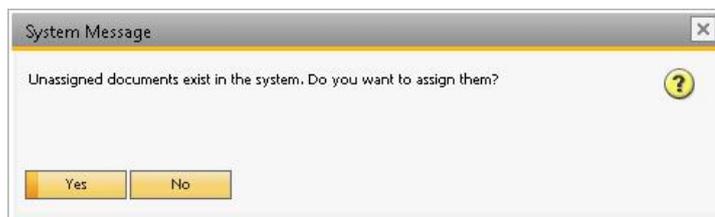
Note

Upon opening the *Project* window, if there have been documents created in the system with the relevant financial project, a dialogue box appears asking you if you want to assign the unassigned documents. For more information, 4.4.3.1 Adding Unassigned Documents.

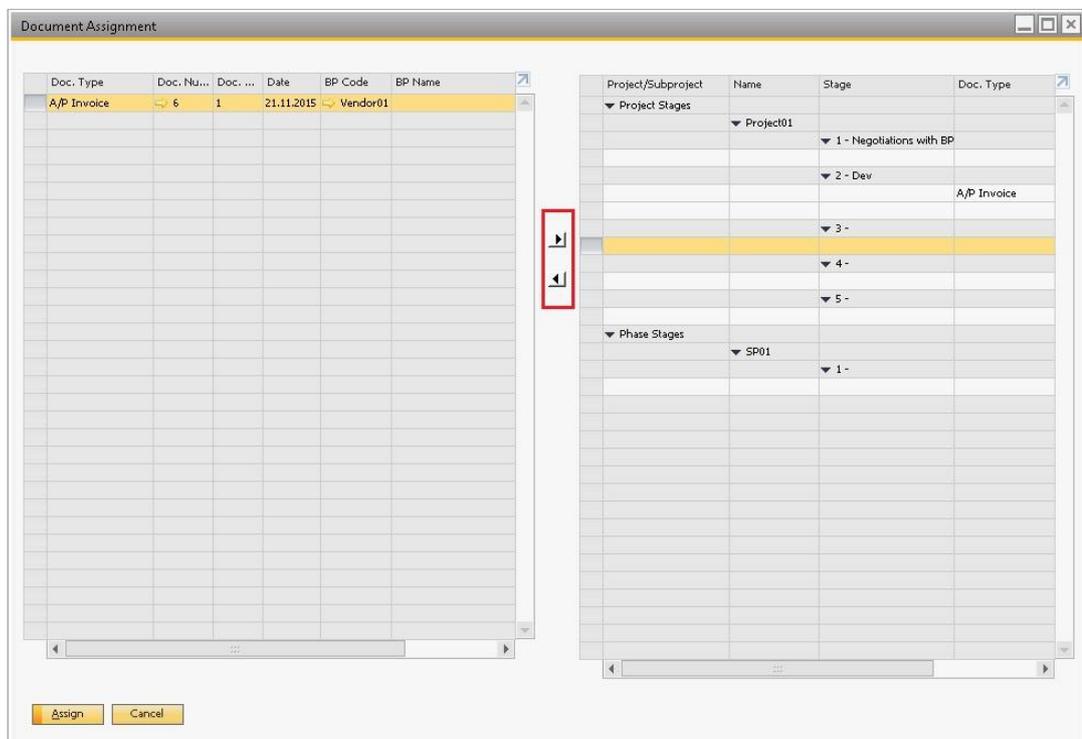
4.4.3.1 Adding Unassigned Documents

Procedure

1. Upon opening the *Project* window, if there have been documents created in the system with the relevant financial project which you have not yet added to the project, the window below appears asking you if you want to assign the unassigned documents.



2. To access the *Document Assignment* window, choose *Yes*.



3. In the left pane, highlight the document you want to assign.

In the right pane, highlight the stage to which you want to assign the document.

To assign the document to the selected stage, choose the right arrow.

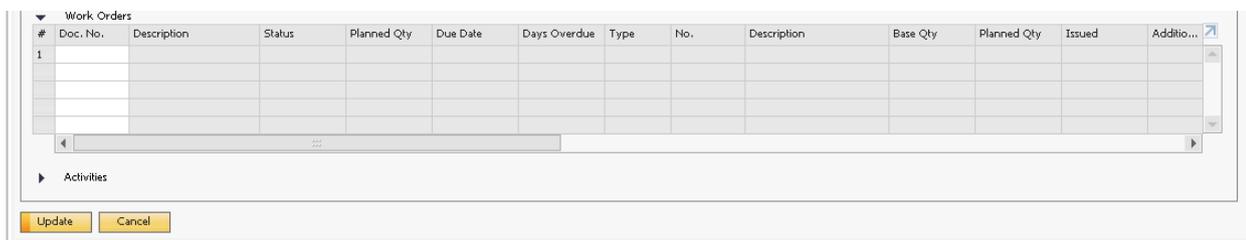
To remove a document assignment from a stage, in the right pane select the desired document and choose the left arrow.

4. To save the changes, choose *Assign*.

4.4.4 Stages Tab - Adding Work Orders

In this section, you can link work orders in the form of production order documents to a stage.

You can link a production order to a stage only if it has been assigned to the relevant financial project. That is, the financial project specified in the production order must be the same as the financial project specified in the project.



#	Doc. No.	Description	Status	Planned Qty	Due Date	Days Overdue	Type	No.	Description	Base Qty	Planned Qty	Issued	Additio...
1													

Note

If a production order is assigned to more than one financial project, you cannot link it to a stage.

Procedure

To link a production order to a stage:

1. In the *Doc. No.* field, from the choose from list select the desired production order. The information from the production order, such as *Status*, *PlannedQty*, *OrderDate*, *DueDate* and so on, is copied into the relevant fields on the row.
2. To save the changes, choose *Update*.

Note

If you assign a production order to a project, upon creating a receipt from production based on that production order, a dialog box appears asking if you want to create a delivery note or a goods receipt document. When you choose *Yes*, and specify which document you want to create, the system adds the following information into the document:

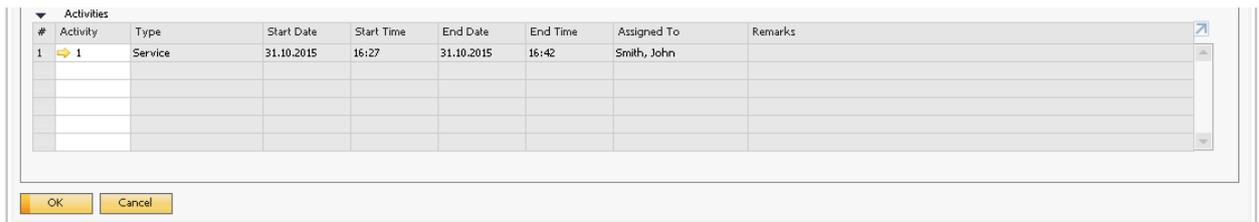
- o Issue from production - items that were received from production and the financial project.
- o Delivery note - items that were received from production, the financial project and the business partner related to the project.

If the project is internal (business partner is assigned to the project), or the receipt from production is based on more production orders which are not related to the same business partner, then a list of business partners appears and you need to choose the relevant business partner.

The system then assigns the generated document to the relevant stage or project automatically.

4.4.5 Stages Tab - Adding Activities

In this section, you can link activities to a stage.



The screenshot shows a table titled 'Activities' with the following columns: #, Activity, Type, Start Date, Start Time, End Date, End Time, Assigned To, and Remarks. The first row contains the following data: # 1, Activity 1, Type Service, Start Date 31.10.2015, Start Time 16:27, End Date 31.10.2015, End Time 16:42, Assigned To Smith, John, and Remarks is empty. Below the table are 'OK' and 'Cancel' buttons.

#	Activity	Type	Start Date	Start Time	End Date	End Time	Assigned To	Remarks
1	1	Service	31.10.2015	16:27	31.10.2015	16:42	Smith, John	

Procedure

1. To link an activity to a stage, in the *Activity* field, select the activity from the choose from list and select *Choose*.
All information from the selected activity record is copied into the relevant fields on the row.
2. To save the changes, choose *Update*.

4.5 Information on the Summary Tab

On this tab, you can view the summary information of all the costs of the project.

The screenshot shows the 'Project' window with the 'Summary' tab selected. The window is divided into several sections:

- Project Information:** Project Type (External/Internal), BP Code (Customer01), BP Name (ABCDE Networks), Contact Person (Jane Smith), Territory, Sales Employee (-No Sales Employee-), and Owner. A checkbox 'Project with Subprojects' is checked.
- Project Details:** Project Name (Project01), Project No. (1), Status (Started), Start Date (22.10.2015), Due Date (31.03.2016), Closing Date, Open Activities (1), % Complete (20%), and Financial Project (FinPro01).
- Budget Section:**

Subproject Budget	36,000,00	Potential Subproject Amount	0,0000	Actual Item Component Cost	0,00
Open Amount (A/P)	0,00	Open Amount (A/R)	0,00	Actual Resource Component Cost	0,00
Invoiced (A/P)	90,00	Invoiced (A/R)	0,00	Actual Additional Cost	0,00
Total (A/P)	90,00	Total (A/R)	0,00	Actual Product Cost	0,00
Total Variance	-35,910,00	Total Variance	0,00	Actual By-Product Cost	0,00
Variance %	-99,7500	Variance %	0,0000	Total Variance	0,00
- Accumulated Budget Section:**

Accumulated Subproject Budget	40,000,00	Accumulated Potential Subproject Amount	0,00	Due Date	31.03.2016
Accumulated Open Amount (A/P)	0,00	Accumulated Open Amount (A/R)	0,00	Actual Closing Date	
Accumulated Invoiced (A/P)	90,00	Accumulated Invoiced (A/R)	0,00	Overdue	161
Accumulated Total (A/P)	90,00	Accumulated Total (A/R)	0,00		
Accumulated Total Variance	-39,910,00	Accumulated Total Variance	0,00		
Variance %	-99,7750	Variance %	0,0000		
- Dates Section:** Due Date (31.03.2016), Actual Closing Date, and Overdue (161).

View the fields under each section.

Budget

Note

This section is related to the current project (or subproject). It does not take into account the values related to its subprojects.

Field	Description
<i>Phase Budget</i>	Displays the accumulated planned costs of all stages of the project (or subproject).
<i>Open Amount (A/P)</i>	Displays the accumulated line totals of all open A/P documents linked to the current project or subproject (except A/P invoices), if the line is related to the project.
<i>Invoiced (A/P)</i>	Displays the accumulated line totals of all A/P invoices linked to the current project or subproject, if the line is related to the project.
<i>Total (A/P)</i>	Displays the sum of <i>Open Amount (A/P)</i> and <i>Invoiced (A/P)</i> .
<i>Total Variance</i>	Displays the monetary value of <i>Total (A/P)</i> minus <i>Phase Budget</i> .
<i>Variance %</i>	Displays the total variance expressed in percentages.

Accumulated Budget

This section displays the same information as the *Budget* section, but the values from all the lower-level subprojects related to the current project or subproject are taken into account as well.

Direct Profit Values

Note

This section is related to the current project (or subproject). It does not take into account the values related to its subprojects.

Field	Description
<i>Potential Subproject Amount</i>	Enter the potential profit amount of the current project or subproject.
<i>Open Amount (A/R)</i>	Displays the accumulated line totals of all open A/R documents linked to the current project or subproject (except A/P invoices), if the line is related to the project.
<i>Invoiced (A/R)</i>	Displays the accumulated line totals of all A/R invoices linked to the current project or subproject, if the line is related to the project.
<i>Total (A/R)</i>	Displays the sum of <i>Open Amount (A/R)</i> and <i>Invoiced (A/R)</i> .
<i>Total Variance</i>	Displays the monetary value of <i>Total (A/R)</i> minus <i>Phase Budget</i> .
<i>Variance %</i>	Displays the total variance expressed in percentages.

Accumulated Profit Values

This section displays the same information as the *Direct Profit Values* section, but the values from all the lower-level subprojects related to the current project or subproject are taken into account as well.

Work Order Costs

Field	Description
<i>Actual Item Component Cost</i>	Displays the accumulated item component costs of all work orders in all stages of the current project or subproject (the work orders related to any lower-level subprojects are not taken into account).
<i>Actual Resource Component Cost</i>	Displays the accumulated item resource component costs of all work orders in all stages of the current project or subproject.
<i>Actual Additional Cost</i>	Displays the accumulated additional costs of all work orders in all stages of the current project or subproject.
<i>Actual Product Cost</i>	Displays the accumulated item component cost of all stages of the current project or subproject.
<i>Actual By-Product Cost</i>	Displays the accumulated by-product costs of all work orders in all stages of the current project or subproject.
<i>Total Variance</i>	Displays the accumulated total variance of all work orders in all stages of the current project or subproject.

Dates

Field	Description
<i>Due Date</i>	Displays the due date of the current project or subproject.
<i>Actual Closing Date</i>	Displays the closing date of the current project or subproject.
<i>Overdue</i>	Displays the number of overdue days between the due date and the actual closing date.

5 Detailed Project Overview

Once a project has been created, a more detailed overview is available than appears on the main *Project* window. This more detailed project overview shows all time-dependent details of projects and subprojects with their relevant stages.

Procedure

- From the *Main Menu*, choose *Project Management* → *Project* → right-click on the project to generate a context menu → *Project Overview*.
- Filter for levels of the project you want to see by choosing from the *Select Level* field: by choosing level 1 you will see only the highest level of the project, by choosing another level you will see that level and all levels above it.
- Access the project details (such as an activity) directly from the overview by selecting  (Link Arrow).



The screenshot shows the 'Project Overview' window in SAP. At the top, there is a 'Select Level' dropdown menu set to '4'. Below this is a table with columns: Project / Subproject, Stage, Task, Description, Work Order, Resource, Activity, Start Date, Due Date, Progress (%), and Complete. The table is organized into a hierarchical structure with expandable subprojects like 'BI Implementation', 'Customizing', 'Print Layouts', 'UI', 'Development', and 'Source Coding'. Each subproject contains tasks with their respective stages (e.g., 'Konzeption/Initiierung', 'Definition/Planung', 'Start/Ausführung'). The 'BI Implementation' subproject is expanded, showing tasks like 'Marketing Documents' with associated work orders (1, 2) and resources (Car, Labour Resource). The 'Progress (%)' column shows the completion status for each task, and the 'Complete' column has checkboxes. At the bottom of the window, there are 'OK' and 'Cancel' buttons.

Project / Subproject	Stage	Task	Description	Work Order	Resource	Activity	Start Date	Due Date	Progress (%)	Complete
Project							01.01.2017		13.230000	<input type="checkbox"/>
BI Implementation	Konzeption/Initiierung	Concept	Marketing Documents	1	Car		01.01.2017	31.03.2017	100.000000	<input checked="" type="checkbox"/>
				2	Labour Resource		02.02.2017	02.02.2017		<input type="checkbox"/>
	Definition/Planung	Concept	User Reports				05.02.2017	05.02.2017		<input type="checkbox"/>
	Start/Ausführung	Develop	Financial Reports				01.04.2017	30.04.2017	100.000000	<input checked="" type="checkbox"/>
							01.05.2017	30.06.2017	0.0	<input type="checkbox"/>
Customizing	Konzeption/Initiierung	Concept	Marketing Documents				01.02.2017	10.02.2017	85.000000	<input checked="" type="checkbox"/>
	Definition/Planung	Concept	User Reports				05.02.2017	05.02.2017		<input type="checkbox"/>
							11.02.2017	28.02.2017	0.0	<input type="checkbox"/>
							20.02.2017	20.02.2017		<input type="checkbox"/>
							15.02.2017	15.02.2017		<input type="checkbox"/>
Print Layouts	Konzeption/Initiierung	Concept	User Reports				01.02.2017	10.02.2017	80.000000	<input checked="" type="checkbox"/>
	Definition/Planung	Develop	Financial Reports				11.02.2017	15.02.2017	100.000000	<input checked="" type="checkbox"/>
UI	Konzeption/Initiierung	Concept	User Reports				01.03.2017	10.03.2017	100.000000	<input checked="" type="checkbox"/>
	Definition/Planung	Concept	Financial Reports				11.03.2017	15.03.2017	100.000000	<input checked="" type="checkbox"/>
	Start/Ausführung	Testing	Test Automation				16.03.2017	20.03.2017	100.000000	<input checked="" type="checkbox"/>
Development	Konzeption/Initiierung	Concept	User Reports				01.04.2017	20.04.2017	38.000000	<input checked="" type="checkbox"/>
	Definition/Planung	Concept	Financial Reports				21.04.2017	30.04.2017	100.000000	<input checked="" type="checkbox"/>
	Start/Ausführung	Testing	Test Automation				01.05.2017	30.06.2017	0.0	<input type="checkbox"/>
Source Coding	Konzeption/Initiierung	Concept	Marketing Documents				01.04.2017	20.04.2017	30.000000	<input checked="" type="checkbox"/>
	Start/Ausführung	Develop	User Reports				21.04.2017	30.06.2017	0.0	<input type="checkbox"/>

Project Overview Fields

Field	Description
<i>Project / Subproject</i>	Displays the name of the project or subproject. Select  (Link Arrow) to open the connected form.
<i>Stage</i>	Shows the stage description from the stage tab.
<i>Task</i>	Displays the task description from the stage tab.
<i>Description</i>	Displays the description of the stage row from the stage tab.
<i>Work Order</i>	Shows the work order number of the stage row from the stage tab. Select  (Link Arrow) to open the connected work order.
<i>Resource</i>	Displays the resource connected to the work order of the stage row in the stage. Select  (Link Arrow) to open the connected resource.
<i>Activity</i>	Activity Number of the stage row in the stage tab. Select  (Link Arrow) to open the connected activity.
<i>Start Date</i>	Start date of the project, subproject, stage (row), work order, or activity.
<i>Due Date</i>	The due date of the project, subproject, or work order. The end date of the stage or activity.
<i>Progress</i>	The progress percentage of the project or subproject.
<i>Completed</i>	Indicates if the row is closed or finished.

6 Billing Documentation Generation Wizard

The wizard collects open documents and billable items connected to your project for invoicing through *A/R Invoices* or *Delivery*. You can choose the sources the wizard targets for invoicing.

Procedure

From the *Main Menu*, choose *Project Management* → *Billing Document Generation Wizard*.

Alternatively, open the *Billing Document Generation Wizard* from a *Project* window via a context-menu to pre-populate the wizard with the selected stage information (this will assign the created documents to the same stage).

From the *Main Menu*, choose *Project Management* → *Project*, right-click on the project to generate a context menu once the stage has been selected, then choose *Billing Document Generation Wizard*.

The wizard will guide you through the necessary steps to generate the marketing documents:

- o In step 1, specify what type of document you want to generate and what sources to use. To use different sources, the wizard may need to be run multiple times.

The screenshot shows the 'Billing Document Generation Wizard' dialog box, titled 'Initial Wizard Configuration'. The subtitle reads 'Please select the Target Document, Customer and other settings ...'. The dialog is divided into several sections:

- Target Document:** A dropdown menu set to 'A/R Invoice'.
- Target Doc. Type:** A dropdown menu set to 'Item'.
- Target Doc. Series:** A dropdown menu set to 'Primär'.
- Customer:** A text field containing 'C20000'.
- Financial Project:** A text field containing 'B1'.
- Project No.:** A text field containing '4'.
- Subproject No.:** An empty text field.
- Stage:** A text field containing 'CO(4-5)'.

Below these fields is the 'Source Types' section, which includes several checkboxes and radio buttons:

- Include open A/P Documents
- Include open A/R Documents
- Include open Workorders
- Include Recorded Times
- Include Project Activities
- Sales Quotations (0)
- Sales Orders (0)
- Deliveries (0)

At the bottom right, there are two columns of date fields labeled 'From' and 'To':

- Posting Date:** Two empty text fields.
- Delivery Date:** Two empty text fields.

At the bottom left, it says 'Step 1 of 3'. At the bottom right, there are four buttons: 'Cancel', 'Back', 'Next', and 'Finish'. The 'Next' button is highlighted with a mouse cursor.

- o In step 2, confirm which documents you want to place on the target document by using the *Confirmed* checkbox. Items must exist for a document to be confirmed. You may need to specify an *Activity Type* and *Quantity* for rows.

Billing Document Generation Wizard

Base Document Line Items
To generate the target document, select one or more base documents.

#	Confirmed	Base Doc. Type	Base Doc.	Description of Service	Base Price Service	Activity Type	Item No.	Item Description	Billable Time	Quantity	Info Price	Wbase	Del. Date
1	<input type="checkbox"/>	AP Service Invoice	G24	Expense	2,000,00 EUR					0,000	0,00 EUR		
2	<input type="checkbox"/>	Activity	43		2,000,00 EUR	1	LE0002	Stundensatz Service	15 Minutes	0,250	30,00 EUR		13.02.2017
3	<input type="checkbox"/>	Activity	45		2,000,00 EUR	1	LE0002	Stundensatz Service	11 Hours	11,000	30,00 EUR		01.05.2017
4	<input type="checkbox"/>	Time Sheet	1		2,000,00 EUR		ACM01	Administration	05:00	9,000	30,00 EUR		01.05.2017
5	<input type="checkbox"/>	Time Sheet	1		2,000,00 EUR		LE0002	Stundensatz Service	11:00	11,000	30,00 EUR		02.05.2017
6	<input type="checkbox"/>	Time Sheet	3		2,000,00 EUR		LE0002	Stundensatz Service	11:00	11,000	30,00 EUR		01.05.2017
7	<input type="checkbox"/>	Time Sheet	3		2,000,00 EUR		ACM01	Administration	07:00	7,000	30,00 EUR		02.05.2017
8	<input type="checkbox"/>	Time Sheet	4		2,000,00 EUR		LE0002	Stundensatz Service	11:00	11,000	30,00 EUR		01.05.2017
9	<input type="checkbox"/>	Time Sheet	4		2,000,00 EUR		ACM01	Administration	07:00	7,000	30,00 EUR		02.05.2017

- o Once the invoice has been created it will be recorded as a document against the relevant project stage.

7 Gantt Chart

You can represent your project in a Gantt chart format to display the different project elements and timelines in an easy to understand layout.

Procedure

From the *Main Menu*, choose *Project Management* → *Project*, right-click on the project to generate a context menu, then choose *Gantt Chart*.

8 Working with Project Reports

Within the project management feature, you can create the following reports:

- Stage analysis - Lists stages of a project or subproject according to the selection criteria.
- Open issues - Lists open or closed issues recorded in a project or a subproject according to the selection criteria.
- Resources - Lists resources that are connected to a project or a subproject within a work order according to the selection criteria.
- Time sheet - Lists time sheet details that are connected to a project or a subproject according to the selection criteria.

8.1 Generating Stage Analysis Reports

Procedure

1. From the *Main Menu*, choose *Project Management* → *Project Reports* → *Stage Analysis*.



2. Specify the following fields:

Field/Checkbox	Description/Activity
<i>Start Date From... To</i>	Specify the start date for the range that you want to include in the report.
<i>Closing Date From... To</i>	Specify the closing date for the range that you want to include in the report.
<i>Project Stage</i>	If you want to specify which stages you want to include in the report, select this checkbox, choose the <i>Browse button</i> , and select one or more stages.
<i>Employee</i>	To include one or more sales employees in the report, select this checkbox, click the <i>Browse button</i> , and select one or more sales employees.
<i>BP Code</i>	To include one or more business partners in the report, select this checkbox, click the <i>Browse button</i> , and select one or more business partners.
<i>Add Finished Stages</i>	To include finished stages in the report, select this checkbox.

3. To generate the report, choose *OK*.

The system generates the report as displayed below:

#	Project/Subproject	Ext...	Type	Project with ...	Level	Parent	Open	Financ...	Business Pa...	Business Pa...	Contact Per...	Sales Emplo...	Status	Due Date	Closing Date	% Complete	Overdue Days	Owner	Subproject ...	Open Amo...	Invoiced (...)	Total (A/P)	Total Variance	Variance %	Accumulate...	Accum...
1	1	Project01	External Project	Yes	1	0		FinPro01	Customer01	ABC/DE	Nelvor	Jane Smith	-No Sales Empl Started	31.09.2015		20.000000	151		36000.000000	0.0	30.000000	90.000000	-3510.000000	-99.750000	4000.000000	0.0
2	2	P3	Internal Project	No	1	0		FinPro03				Susanne J.	Started	01.05.2015		0.0	0		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
3	1	SP01	External Subproject	Yes	2	1	0	FinPro01	Customer01	ABC/DE	Nelvor	Jane Smith	-No Sales Empl Open			0.0	0	Smith, John	4000.000000	0.0	0.0	0.0	-4000.000000	-100.000000	4000.000000	0.0

In the report, you can see summarized information for the selected stages by project and subproject.

- To access a detailed view of stages belonging to the project or subproject, double-click the desired row. The *Stages* window appears as displayed below.

#	Project/Subproject	Position	Start Date	Closing Date	Task	Stage	Description	Planned Cost	Invoiced A...	Open Amo...	Invoiced A...	Open Amo...	% Complete	Finished	Owner	Stage Depe...	Stage Depe...	Stage ...
1	Project01	1	03.11.2015	16.10.2015	1	Concept	Negotiations with	1000.000000	10.000000	0.0	80.000000	0.0	10.000000	<input checked="" type="checkbox"/>				
2	Project01	2	17.11.2015	11.12.2015	3	Definition	Dev	3000.000000	0.0	0.0	10.000000	0.0	10.000000	<input checked="" type="checkbox"/>				
3	Project01	3	14.12.2015	31.12.2015	4	Launch/		5000.000000	0.0	0.0	0.0	0.0	10.000000	<input type="checkbox"/>				
4	Project01	4	20.11.2015	25.11.2015	1	Perform.		0.0	0.0	0.0	0.0	0.0	10.000000	<input type="checkbox"/>				
5	Project01	5				Concept		0.0	0.0	0.0	0.0	0.0	10.000000	<input type="checkbox"/>				

8.2 Generating Open Issues Reports

Procedure

- From the *Main Menu*, choose *Project Management* → *Project Reports* → *Open Issues*.

- Specify the following fields:

Field/Checkbox	Description/Activity
<i>Project From... To</i>	Specify the range of projects you want to include in the report.

Field/Checkbox	Description/Activity
<i>Responsible Person From... To</i>	Specify the range of persons responsible for open issues that you want to include in the report.
<i>Due Date From... To</i>	Specify the range of due dates of projects that you want to include in the report.
<i>Closed</i>	Select this checkbox to include open issues that have been marked as <i>Closed</i> .
<i>Priority</i>	To specify one or more priority levels of open issues which you want to include in the report, select this checkbox. Then click the <i>Browse</i> button and select one or more priority levels.
<i>Area</i>	To specify one or more areas of open issues which you want to include in the report, select this checkbox. Then click the <i>Browse</i> button and select one or more areas.

3. To generate the report, choose *OK*.

The system generates the report with open issues according to the selection criteria, as displayed below:

#	Project	Subproject	Stage	Area	Priority	Rem...	Responsible	Entered By	Date	Due Date	Effort
1	Project01		Negotiat	Premises		Deco	Smith, John	Smith, John	20151031	20160831	80.000000
2	Project01		Negotiat	Catering	high		Smith, John	Smith, John	20151031	20160831	400.000000
3	P3			Catering	high		Smith, John		20151121	20150501	0.0

8.3 Generating Resources Reports

Procedure

1. From the *Main Menu*, choose *Project Management* → *Project Reports* → *Resources*.

Resources - Selection Criteria

Project From [] To []

Start Date From [] To []

Closing Date From [] To []

Resource []

[OK] [Cancel]

- Specify the following fields:

Field/Checkbox	Description/Activity
<i>Project From... To</i>	Specify the range of projects you want to include in the report.
<i>Start Date From... To</i>	Specify the range of start dates of projects that you want to include in the report.
<i>Closing Date From... To</i>	Specify the closing date range that you want to include in the report.
<i>Resources</i>	Select this checkbox to specify one or more resources to be included in the report. Then select the <i>Browse</i> button and select one or more resources.

- To generate the report, choose *OK*.

The system generates the report with open issues according to the selection criteria, as displayed below:

#	Type	Resource	Project No.	Subproject ...	Stage	Doc. No.	Description	Status	Due Date	Days Overdue	Base Qty	Planned Qty	Issued	Additional Qty	Available	UoM Name	Ware...
	Machine	res01	Project01		1	1	Negotiations with BP	Planned	20151102		1.000000	1.000000	0.0	0.0	0.0		01

8.4 Generating Time Sheet Reports

Procedure

- From the *Main Menu*, choose *Project Management* → *Project Reports* → *Time Sheet*.
- Choose the project, subproject or stage level you want to run the report for.
- Specify the following fields:

Field/Checkbox	Description/Activity
<i>Project</i>	Specify the range of projects you want to include in the report.
<i>Subproject</i>	Specify the specific subject if required.
<i>Stage</i>	Specify the stage you want the report to focus on.
<i>Include Subprojects</i>	Select this checkbox to include subprojects.

- To generate the report, choose *OK*.

The system generates a report with time sheet details for everyone recorded against the project:

The screenshot shows the SAP Business One interface. On the left is the 'Main Menu' with various modules like Inventory, Resources, Production, MRP, Service, Human Resources, and Project Management. The 'Project Management' section is expanded, showing options like Project, Billing Document Generation Wizard, Project Reports, Stage Analysis, Open Issues, Resources, and Time Sheet Report.

Two dialog windows are open:

- Time Sheet - Selection Criteria:** This window allows selecting criteria for the report. The 'Project' field is set to '2'. The 'Subproject' field is empty. The 'Stage' checkbox is checked. There is an 'Include Subprojects' checkbox which is also checked. 'OK' and 'Cancel' buttons are at the bottom.
- Time Sheet Report:** This window displays the report parameters and the data table.

Project No.		Project Name									
2		Project 2									
Subproject No.		Subproject Name									
Stage		Description									
Time Recording											
#	Subpr...	Subproject Name	Stage	User/Employee	Date	Start Time	End Time	Activity Type	Financial Project	Cost Center	Branch
1	1	P2Sub1	Konzeption/Initiierung	manager	09.06.2017	01:00	02:00		FP2		
2			Definition/Planung	manager	10.06.2017	03:00	05:00		FP2		

9 Defining Activity Types

You can define the activity types that are used in the time sheet. For more information about the time sheet, see section 11 Defining Time Sheet.

Procedure

- From the *Main Menu*, choose *Administration* → *Setup* → *Project Management* → *Activity Types*.
The *Activity Types - Setup* window appears.

#	Activity ...	Labor Item	Chargeable	Absence
1	Work	4780	<input type="checkbox"/>	<input type="checkbox"/>
2	Travel	4330	<input type="checkbox"/>	<input type="checkbox"/>
3	Administratic		<input type="checkbox"/>	<input type="checkbox"/>
4	Consulting		<input checked="" type="checkbox"/>	<input type="checkbox"/>
5	Sick Leave		<input type="checkbox"/>	<input checked="" type="checkbox"/>
6	Vacation		<input type="checkbox"/>	<input checked="" type="checkbox"/>
7			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- Right-click in the desired row and choose *Add Row*. Then specify the following fields:

Field/Checkbox	Description/Activity
<i>Activity</i>	Enter the name of the activity.
<i>Labor Item</i>	If a labor item is related to this activity type, from the choose-from menu, select the relevant item.
<i>Chargeable</i>	If the activity type is chargeable, select this checkbox.
<i>Absence</i>	If the activity type includes an absence, select this checkbox.

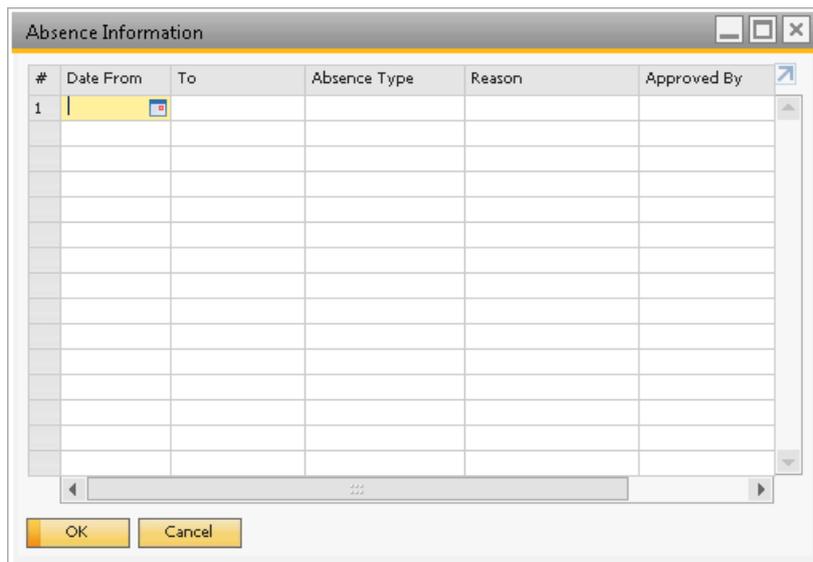
- To save the changes, choose *OK*.

Note

You can delete an activity at any time by right-clicking the desired row and choosing *Delete Row*.

10 Employee Master Data - Absence Information

A column *Absence Type* is available in the *Absence Information* window which you access from the *Employee Master Data* window (*Employee Master Data* → *Administration* → *Absence*).



To define a time for an activity in the *Time Sheet*, follow the procedure below.

Procedure

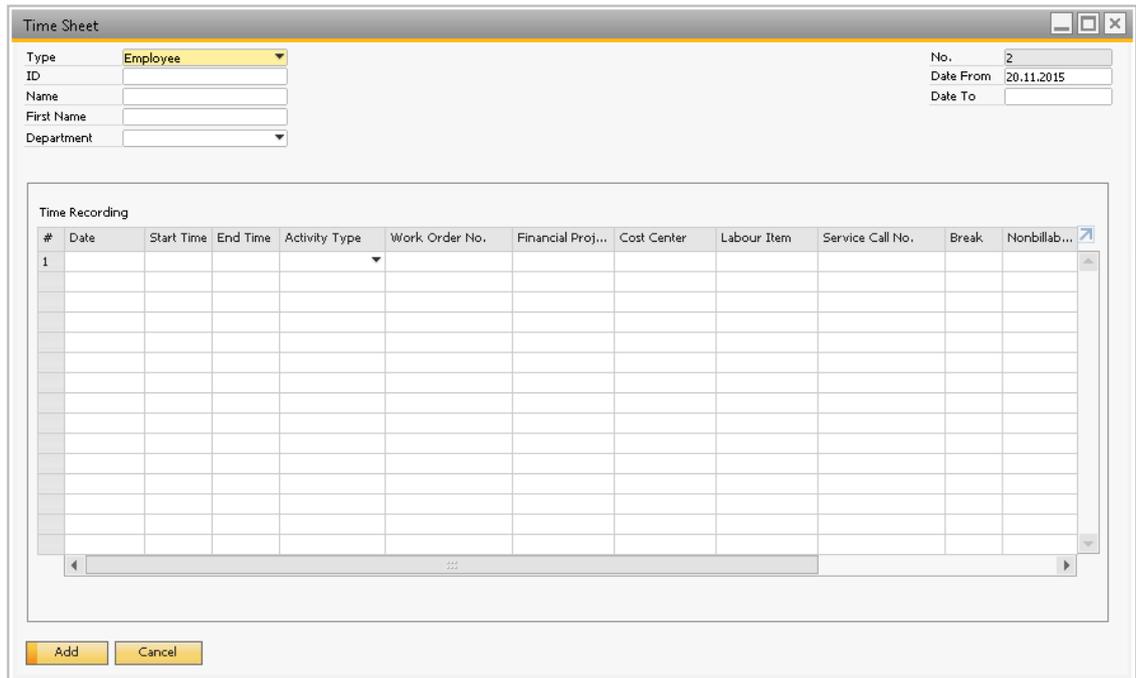
1. Specify the following fields:

Field	Activity/Description
<i>Date From/To</i>	Enter the date range of employee's absence.
<i>Absence Type</i>	From the choose-from list, select the relevant activity type. Only activity types that are defined as Absence in the <i>Activity Type - Setup</i> window are available.
<i>Reason</i>	Enter the reason for the absence.
<i>Approved By</i>	From the choose-from list, select the relevant employee who approved the absence.

2. To save the changes, choose *Update*.

11 Defining Time Sheets

The *Time Sheet* feature enables you to record times of activities for employees, users, or others and use it as a reference.



Procedure

1. From the *Main Menu*, choose *Human Resources* → *Time Sheet*.
2. In the header area, specify the following fields:

Field/Checkbox	Activity/Description
<i>Type</i>	The following options are available: <ul style="list-style-type: none"> • <i>Employee</i> • <i>User</i> • <i>Other</i>
<i>ID</i>	From the choose-from list, select the employee for whom you want to define the time sheet.
<i>Date From, Date To</i>	Specify the date range to which the time sheet applies. The <i>Date From</i> is the current date by default, however, you can change it to a different date.
<i>Department</i>	Select the relevant department.

3. View or define the following fields in the *Time Recording* table:

Field/Checkbox	Activity/Description
<i>Date</i>	Specify the date of the activity.
<i>Start Time</i>	Specify the time range of the activity.
<i>End Time</i>	
<i>Activity Type</i>	Select the activity type. If you select an activity type that is defined as Absence, then what happens?
<i>Work Order No.</i>	You can enter a work order number if <i>User</i> has been selected in <i>Type</i> .
<i>Financial Project</i>	Select the relevant financial project.
<i>Cost Center</i>	Select the relevant cost center if no work order or service call was specified.
<i>Stage</i>	Select the relevant stage from the options.
<i>Labor Item</i>	Displays the default labor item if defined in the <i>Activity Type - Setup</i> window.
<i>Service Call No.</i>	Select the relevant service call number.
<i>Break</i>	Specify the time duration of a break.
<i>Non-Billable Time</i>	Specify the duration of non-billable time.
<i>Effective Time</i>	Displays the effective and billable times based on the information you provided.
<i>Billable Time</i>	

4. To save the changes, choose *Update*.

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Material Number

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