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Factsheet

# XFT Project File

[www.xft.com/en/product/xft-project-file](http://www.xft.com/en/product/xft-project-file)



**SAP® Certified**  
Powered by SAP NetWeaver®

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Integration with SAP S/4HANA®



# About XFT Project File

## Project Management in Your SAP System

Effective project management is key to almost every area of your company, whether you're developing a new industrial product, designing new buildings and facilities, carrying out an administrative project, or implementing new software. In such projects, complexity can rise very quickly. Numerous interdependent tasks need to be coordinated and assigned to the right employees and business partners, and the status of every step of the project must be monitored. And, of course, costs need to stay within budget. But every project manager knows that not all projects will go according to plan!

With XFT Project File, you can view all project phases at a single glance. You can distribute tasks, track progress, and store results centrally in your SAP system. You can also intervene at any time, readjusting the course of the project at any time. This allows you to remain flexible – even as plans change.

## Overview of Features

### Project File

- Using XFT Project File, you can create project files in the project system with or without a reference to an SAP project.
- Project files contain a hierarchical directory structure for storing relevant content. The directories follow either a fixed template which describes and summarizes the project milestones, departments and divisions involved, or typical activities/tasks. Alternatively, the structure can dynamically map the project structure predefined in SAP Project System with WBS elements, processes, and so on.
- You can configure multiple project types in the system and assign different project templates to each.
- You manage SAP objects, deadlines (milestones), documents, and tasks centrally in project files.
- SAP objects that are linked to the projects can be embedded in the projects, for example, customers, materials, equipment, orders, purchase orders, suppliers, and tools. This allows you to access and view them directly from the project file, or change them, if necessary.
- You can integrate deadlines into the file structure. Use the deadlines, for example, for planning and managing project meetings and assigning employees and documents to these.
- All of the XFT Add-on Suite functions are available for managing documents in SAP: simple file attachments, attachments to business objects that are also to be visible in the file, document info records (for example, for technical drawings).



- Documents can be checked in, revised, versioned, and so on. They are subject to the SAP authorization system so that read or write access to the documents can be controlled precisely.
- Documents are stored securely and are no longer accidentally lost.
- Assigning documents to the business context makes them easy to find and improves the project overview and background knowledge of the project, enabling you to make well-founded project decisions.
- Tasks are assigned to an agent or a team, have a scheduled start date and target deadline, and a status which allows you to track whether project activities are already completed at all times.
- Functions are available for the workflow-based collection of project documents, such as regular status reports or risk lists.
- Approvals can be started to complete milestones or projects. These document the decisions made by the project team members. The result of the approval can be used, for example, to update the overall project status automatically.
- If using SAP PS, you can branch from the Project Builder (CJ20N) to the assigned project file. The project file can refer to the project definition or to individual WBS elements. You can trigger the creation of project files from the Project Builder.
- In this case, the project definition, WBS elements, and the assigned project files are closely integrated (in both directions).
- You can also set up an authorization concept for project files based on specific customer requirements. A project manager can also assign employees to the project and thus grant corresponding authorizations to them for the project documents. Local, global, and ad hoc user groups are available for this purpose.
- The creation of central project documents, such as milestone reports, status reports, evaluations, and so on, from the project file can be supported based on specific customer requirements.



## Integration in Other Applications

- Searches for project files are available.
- You can configure searches for documents stored in project files.
- You can embed project files in workflows and start workflows and circulations from project files.
- You can link project files to other processes. For example, you can set up a project file for a product line. The product line bundles all associated products and the respective change processes.
- Typical topics for project files include: Planning and creation of a plant, development of a new product, IT projects, planning and creation of buildings or building technology, ...



Would you like to learn more about our products or see what XFT Project File can do for your business? Contact us today for a live demo!



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