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Factsheet

XFT Project File

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SAP® Certified
Integration with SAP S/4HANA®



About XFT Project File

Project Management in SAP System

Whether it's a development project for a new industrial product, the design of new buildings and facilities, an administrative project or a software introduction: effective project management is required in practically every area of your company. The complexity can quickly escalate: Numerous interdependent tasks have to be coordinated, the right employees and business partners assigned, and the status of many process steps managed. And, of course, the costs must remain within reasonable limits. But every project manager knows that no project runs exactly according to plan.

With XFT Project File you keep track of all important project steps. You assign tasks, track progress and store results centrally in the SAP system. You can intervene in the course of the project at any time and make adjustments. This allows you to remain flexible and successful, even if plans change.

Overview of Features

Project File

- Project files with XFT Project File can be created with or without reference to an SAP project in the Project System.
- Project files contain a hierarchical directory structure for storing relevant content. The directories follow either a fixed template that describes and summarizes project milestones, involved departments and areas or typical activities / tasks. Alternatively, the structure can dynamically map the project structure with PSP elements, activities, etc. as specified in the SAP Project System.
- Several project types can be set up in the system, to which different project templates can be assigned.
- In project files you manage central SAP objects, dates (milestones), documents and tasks.
- SAP objects related to the projects can be embedded in the projects, e.g. customers, materials, equipment, orders, purchase orders, suppliers, tools. They can thus be accessed, viewed or, if necessary, changed directly from the project file.
- You can integrate appointments into the record structure. You use the appointments, for example, to plan and manage project meetings with assignment of employees and documents.
- All functions of the XFT Add-on Suite are available for document management in SAP: simple attachments to the record, attachments to business objects that should also be visible in the record, document info records (e.g. for technical drawings).
- Documents can be checked in, revised, versioned, etc. They are subject to the SAP authorization system, so that reading or changing access to the documents can be controlled in fine granularity.
- Documents are securely stored and no longer get lost accidentally.



- By assigning documents to their technical context, they are easy to find and improve the project overview and background knowledge of the project, enabling you to make technically sound project decisions.
- Tasks are assigned to an agent or a team, have a planned start and a target date and a status, so that it is always possible to track whether project activities are already completed.
- Functions are available for workflow-supported collection of project documents such as regular status reports or risk lists.
- Releases can be started to close milestones or projects. This documents the decisions of the project members. The result of the release can be used to automatically update the overall project status, for example.
- When using SAP PS, you can jump from the Project Builder (CJ20N) to the assigned project file. The project file can refer to the project definition or to individual PSP elements. The creation of project files can be triggered from the Project Builder.
- In this case there is close integration between project definition, WBS elements and the assigned project files (in both directions).
- An authorization concept for project files can be set up according to customer-specific requirements. It is also possible that a project manager assigns employees to the project and thus authorizes them accordingly 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 etc. from the project file can be supported according to customer-specific requirements.



Integration with other applications

- Searches for project files are available.
- Searches for documents stored in project files can be set up.
- Project files can be embedded in workflows and workflows and circulations can be started from project files.
- Project files can be linked to other processes. For example, a project file for a product line can be linked with change processes for the associated products.
- Typical topics for project files are: Planning and construction of a plant, development of a new product, IT projects, planning and construction of buildings or building services, ...



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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