INTRODUCTION

Purpose of this guide

Resource Related Billing (RRB) is the SAP term for its functionality whereby billings can be generated based upon the resources (hours, costs etc) consumed. These types of billings are common in both the commercial and government business sectors and appear in many forms: Time and Material Services, Cost Type (Cost Plus Fee etc) Billings, Development Programs, Power by the Hour Support Contracts etc.

This document is designed to be a step by step guide to successfully configure and execute a simple resource related billing (RRB) model. While each user’s actual business requirements will vary, the fundamental processes within SAP are fairly standard. By following the steps within this guide, users can create a working RRB solution based upon standard configuration settings that can be tailored to meet their specific requirements.

While this document is not intended to be a detailed reference guide on SAP functionality, the following topics are covered in sufficient detail to build the RRB model discussed herein.

- RRB Solution Requirement Considerations
- RRB Configuration in the IMG
- Sales and Billing Documents
- Pricing Procedure Design
- RRB requirements from Project Systems
- Simple Costing Sheet Development
- Executing Resource Related Billing (DP91)

Who should use this guide

This guide is designed for people in the following roles:

- Contract Administrators
- Contract Billers
- Consultants
- System Administrators

What you should know before using this guide

The guide is really intended to be a step by step walk through of a simple RRB solution model. While quite a bit of detail specific to the model is presented, it is not intended to be a reference for general SAP configuration or functionality. It is therefore helpful to possess a good understanding of the SAP Project System, SAP Sales & Distribution, and the integration of these modules with SAP Controlling. You should also have a good understanding of your internal business processes for Contract Management, Contract Billings, and the tracking of costs associated with your projects.
RESOURCE RELATED BILLING (RRB) PROCESS FLOW DIAGRAMS

The following flow diagram illustrates the configuration steps that are required to set up the RRB model described within this document. It may be useful to refer back to it while using this document to understand how the process step fits.

Configuration Process Flow
Contract Setup, Maintenance and Billing Process Flow

The following is a top level process flow that provides a high level, step by step illustration for the contracts and billing process. This will be useful to better understand the timing and dependencies of the steps described in this document.
Configuration Steps

1. Create Sales Document Type

Since RRB is a billing function, it relies on some sort of customer sales document as its source. This sales document defines the customer, the payment terms, shipping information etc to facilitate the sale. Within SAP, there are several different documents types that can be used for this purpose, such as Contracts, Sales Orders, Service Orders, Plant Maintenance Orders etc. Although these document types vary a bit in logistics functionality, for RRB purposes they all behave pretty much the same. For more detailed information of the differences in these document types, see the SAP Help.

For purposes of this guide, we will use a Contract as our document type. The following steps guide through the creation of a basic a basic Contract.

Steps:

a) Enter Implementation Guide (IMG) Transaction SPRO

b) From the IMG
   Follow menu path: Sales and Distribution>Sales>Sales Document Header>
   Select: Define Sales Document Types

SAP will open a window with a list of all the currently defined Sales Order Types. A new Sales Order type can either be entered from scratch or created by using an existing document as a template. We will use the document type CQ as a template and use the “Copy” functionality.

The advantage in copying an existing document type is that it will bring along a lot of configuration that likely already meets many of your requirements. In many cases, only a little editing will be required. On the down side, it may bring along more than you really need. This is usually not a real problem as you can easily delete what is not needed.
c) Select the sales order type (SaTy): CQ = *Quantity Contract* as the source document to copy.

d) Press the “Copy” icon.

Pressing the copy icon will open CQ contract in change mode. The user can then make the required changes to the document definition and rename it:

![Change View "Maintain Sales Order Types": Overview](image)

That is really all that needs to be done at this time. The configuration that comes along will be sufficient for now.

The Billing Request document type (LV) that is assigned by default will need to be changed, but we will need to first go create a new request type and then come back and assign it.

e) Rename the document type. For this document example, we will call it ZRRB = Resource Rel Contr.

![Change View "Maintain Sales Order Types": Details of Selected Set](image)
f) Save doc type ZRRB

Notice that during saving, that the copy control configuration was also created.

2. Create Item Category

Once our Contract type is created, we are ready to create the item category. The item category is very important. The item category defines how sales items on the sales document will behave in terms of logistics, pricing and billing. For our RRB example, we want an item category that identifies our Dynamic Item Processor (DIP) and our price procedure. These two ingredients are really all that we need from the item category that will be unique. We therefore want to again find a suitable “template” item category that we can use to copy from.

Configuration Steps:

a) Enter Implementation Guide (IMG) Transaction SPRO

b) From the IMG
   Follow menu path: Sales and Distribution>Sales>Sales Document Item>
   Select: Define Item Categories
The Define Item Categories button will open a list of all the existing item categories. This will probably be a very long list and there will be many very subtle variations between them if any at all. Still, it is usually a good idea to create a new item category if it can be logically identified to a specific business process. This will make it much easier to change later without causing an impact in other business processes. For our purposes we will use the item category TAD as our template.

c) Press the “Copy” icon.

Pressing the copy icon will open the item category in change mode. The user can then make the required changes and rename it:
d) Rename the item category. For this document example, we will call it ZRRB = RRB Service.

The only items that are required to be set are the Pricing and Business item selections in the Business Data block and the DIP profile in the Control of Resource-related Billing and Creation of Quotations block (at the bottom).

![Image of Change View "Maintain Item Categories": Details]

- **Business Data**
  - Item Type: RRB
  - Billing Relevance: RRB Service

- **General Control**
  - New Entries

![Image of Service Management and DIP Profile]

- **Control of Resource-related Billing and Creation of Quotations**
  - DIP Prof: RRB/Template

- **Service Management**
  - Repair proceed: 

f) Save the new item category.
Notice again that the copy control comes along from our template item category.

3. **Assign Item Category to Sales Document Type**

A sales document, (our contract in this case), is capable of having many different item categories useable. In order to utilize the item category that we created in the prior step, there are some assignments that must be made. SAP uses a combination of keys to reconcile which item category to propose on a sales document. These relationships must be established in configuration first. Later in this document we will discuss the role that the Service Material has in determining the item category.

Configuration Steps:

a) Enter Implementation Guide (IMG)  
   Transaction SPRO

b) From the IMG  
   Follow menu path: Sales and Distribution> Sales > Sales Document Item>  
   Select: *Assign Item Categories*