BR - OINI Project Creation

Domain: Country Accounting

Responsibility area: N/A

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Scope

? Unknown Attachment

ERP

WP1

Frequency

? Unknown Attachment

References

CN43N, CJ01; CJ02

Forms

Person Responsible and Positions

Attachments

Previous OP << BR - OINI Project Creation >> *Next OP*

1. Objective and Scope

1.1. Objective of this Operation

This procedure explains how to create OINI projects (R&D WBS) in SAP for Brazilian companies.

1.2. Scope

This procedure applies to Brazilian companies in WP1.

2. Definitions

See Finance Glossary:

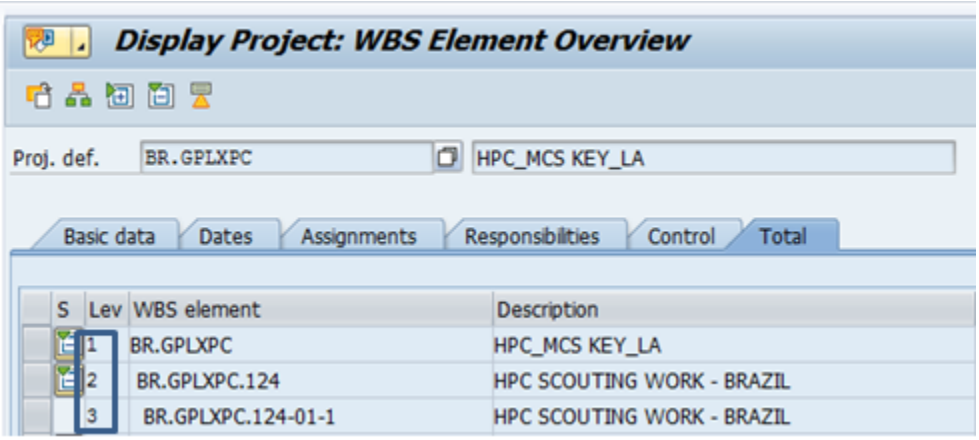
- IECRA
- WBS
- WP1

3. Tasks description

There are 3 types of creation request:

- 1st level - Beginning - OINI heading
- 2nd level - Project
- 3rd - Subproject

The difference is in the field "level" that must be filled accordingly.



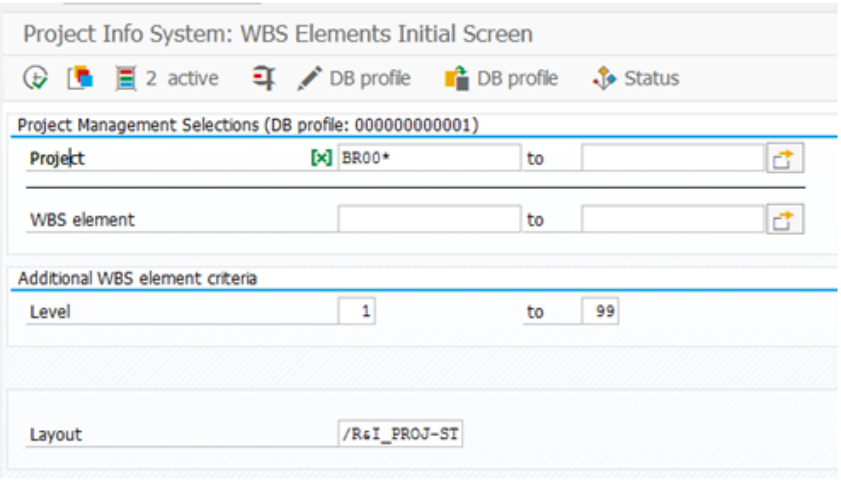
The requests can have 2 formats: For the 1st creation, it is sent only a template with some information in square format.

- **1st format:** request with the information in square format.

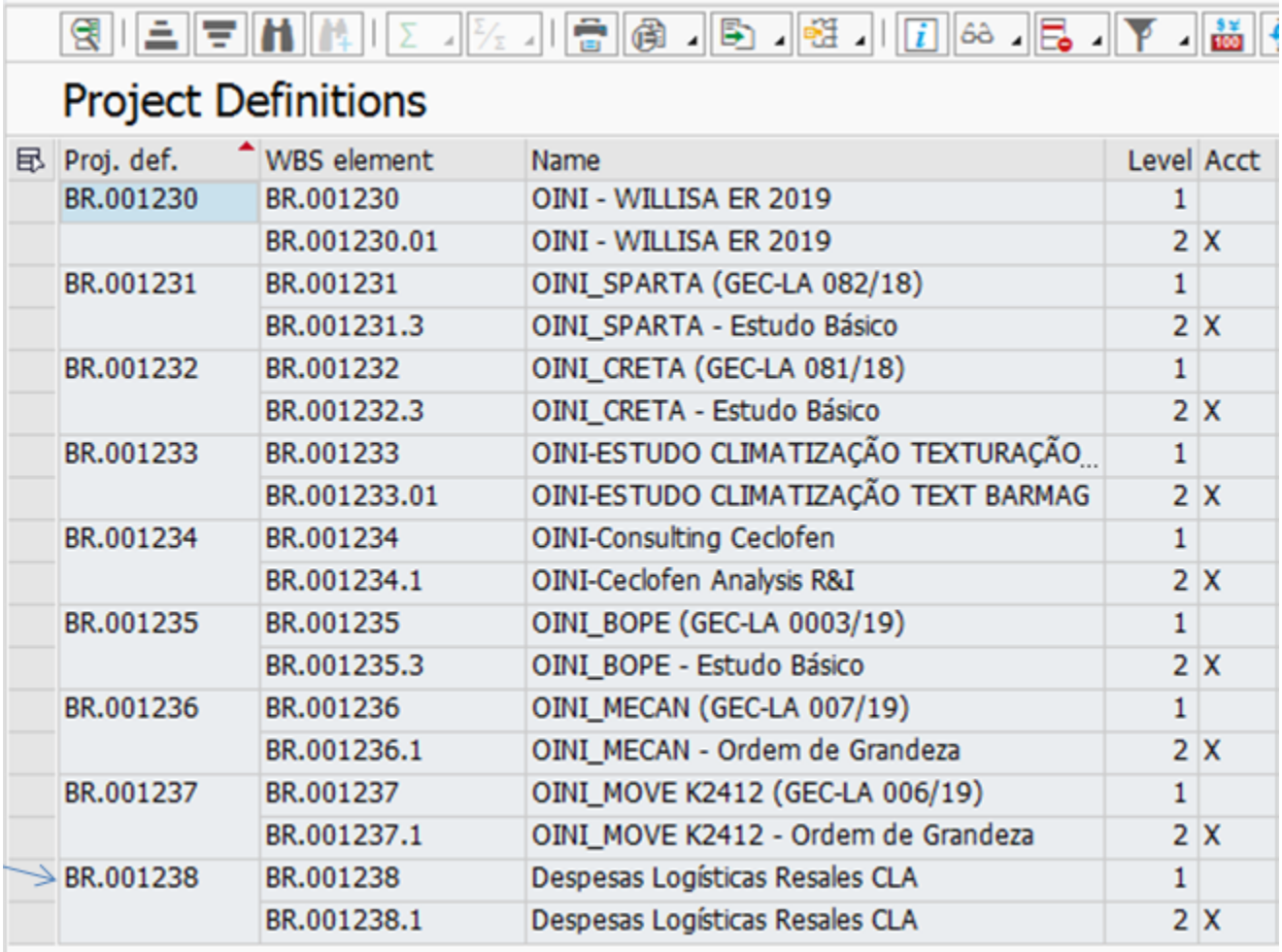
Solicitação de Cadastro de OI e OINI	
Nome	OINI - PROJETO PARIS
Descrição	OINI - PROJETO PARIS
Centro de Custo	7515-5001
Centro de Custo Liberador	7515-5001
Centro de Lucro	7523-I0571
Categoria	30
Genero	C
KR$	Não estimado
Empresa	RHPA
Divisão	7523
Local	ACTW
Data Solicitada	10/03/2017
Solicitante	Melissa Menezes

In this type of request, the name of the heading is not informed, we need to search it in CN43N.

Fill in the Variant 7523_OINI



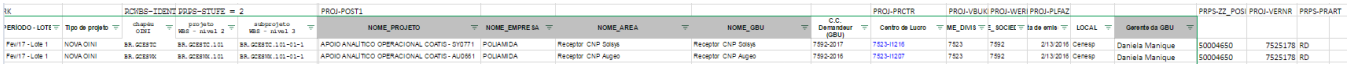
Select the column "Project definition", sort by descending order and see which is the last project created.



Project Definitions

Proj. def.	WBS element	Name	Level	Acct
BR.001230	BR.001230	OINI - WILLISA ER 2019	1	
	BR.001230.01	OINI - WILLISA ER 2019	2	X
BR.001231	BR.001231	OINI_SPARTA (GEC-LA 082/18)	1	
	BR.001231.3	OINI_SPARTA - Estudo Básico	2	X
BR.001232	BR.001232	OINI_CRETA (GEC-LA 081/18)	1	
	BR.001232.3	OINI_CRETA - Estudo Básico	2	X
BR.001233	BR.001233	OINI-ESTUDO CLIMATIZAÇÃO TEXTURAÇÃO...	1	
	BR.001233.01	OINI-ESTUDO CLIMATIZAÇÃO TEXT BARMAG	2	X
BR.001234	BR.001234	OINI-Consulting Ceclofen	1	
	BR.001234.1	OINI-Ceclofen Analysis R&I	2	X
BR.001235	BR.001235	OINI_BOPE (GEC-LA 0003/19)	1	
	BR.001235.3	OINI_BOPE - Estudo Básico	2	X
BR.001236	BR.001236	OINI_MECAN (GEC-LA 007/19)	1	
	BR.001236.1	OINI_MECAN - Ordem de Grandeza	2	X
BR.001237	BR.001237	OINI_MOVE K2412 (GEC-LA 006/19)	1	
	BR.001237.1	OINI_MOVE K2412 - Ordem de Grandeza	2	X
BR.001238	BR.001238	Despesas Logísticas Resales CLA	1	
	BR.001238.1	Despesas Logísticas Resales CLA	2	X

- **2nd Format:** from the 2nd level onward, the requester sends an excel file and a Google Drive link.



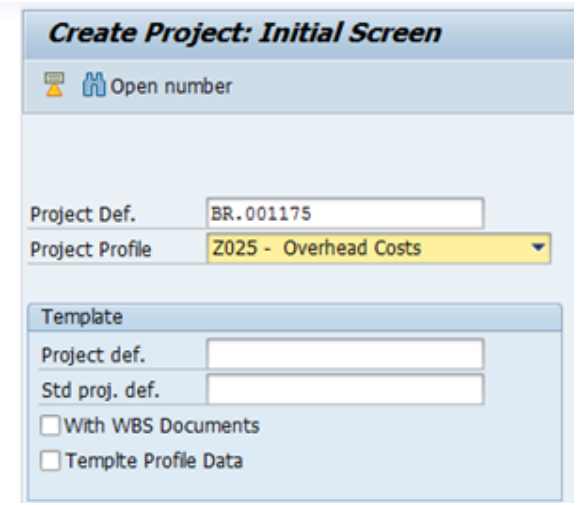
NK		PROJS-IDENT PRPS-STUFE = 2			PROJ-POST1					PROJ-PRCTR	PROJ-VBUK	PROJ-WERI	PROJ-PLFAZ			PRPS-ZZ_POSI	PROJ-VERNR	PRPS-PRART
ERIODO - LOTE	Tipo de projeto				NOME_PROJETO	NOME_EMPRESA	NOME_AREA	NOME_GBU	C.C. Demandeur (GBU)	Centro de Lucro	ME_DIMS	S_SOCIE	la de emis	LOCAL	Gerente da GBU			
Fevl7 - Lote 1	NOVA OINI	BR.SCE87C	BR.SCE87C.101	BR.SCE87C.101-01-1	APOIO ANALITICO OPERACIONAL COATIS - SY0771	POLIAMIDA	Receptor CNP Solvys	Receptor CNP Solvys	7592-2017	7523-I1216	7523	7592	2/13/2016	Cenesp	Daniela Manique	50004650	7525178	RD
Fevl7 - Lote 1	NOVA OINI	BR.SCE81K	BR.SCE81K.101	BR.SCE81K.101-01-1	APOIO ANALITICO OPERACIONAL COATIS - AU0661	POLIAMIDA	Receptor CNP Augeo	Receptor CNP Augeo	7592-2016	7523-I1207	7523	7592	2/13/2016	Cenesp	Daniela Manique	50004650	7525178	RD

- **Both formats must have the following information:**
  - Company
  - Period
  - Project type
  - Level
  - Project name
  - Area or CGU (in order to search the profit center)
  - Cost center
  - Division
  - Profit center
  - Entry date (in case of a new project)
  - Manager / requester
  - Responsible
  - Type (if it is OI or RD - for OINI is RD)

3.1. I create the heading of the WBS Expense

CJ01

- Insert the number of the new project in the field Project Def.
- Select option Z025 - Overhead Costs.



ENTER

In this step, we have the following information:

- Project name
- Person responsible
- Plant
- Profit center
- Date

Solicitação de Cadastro de OI e OINI	
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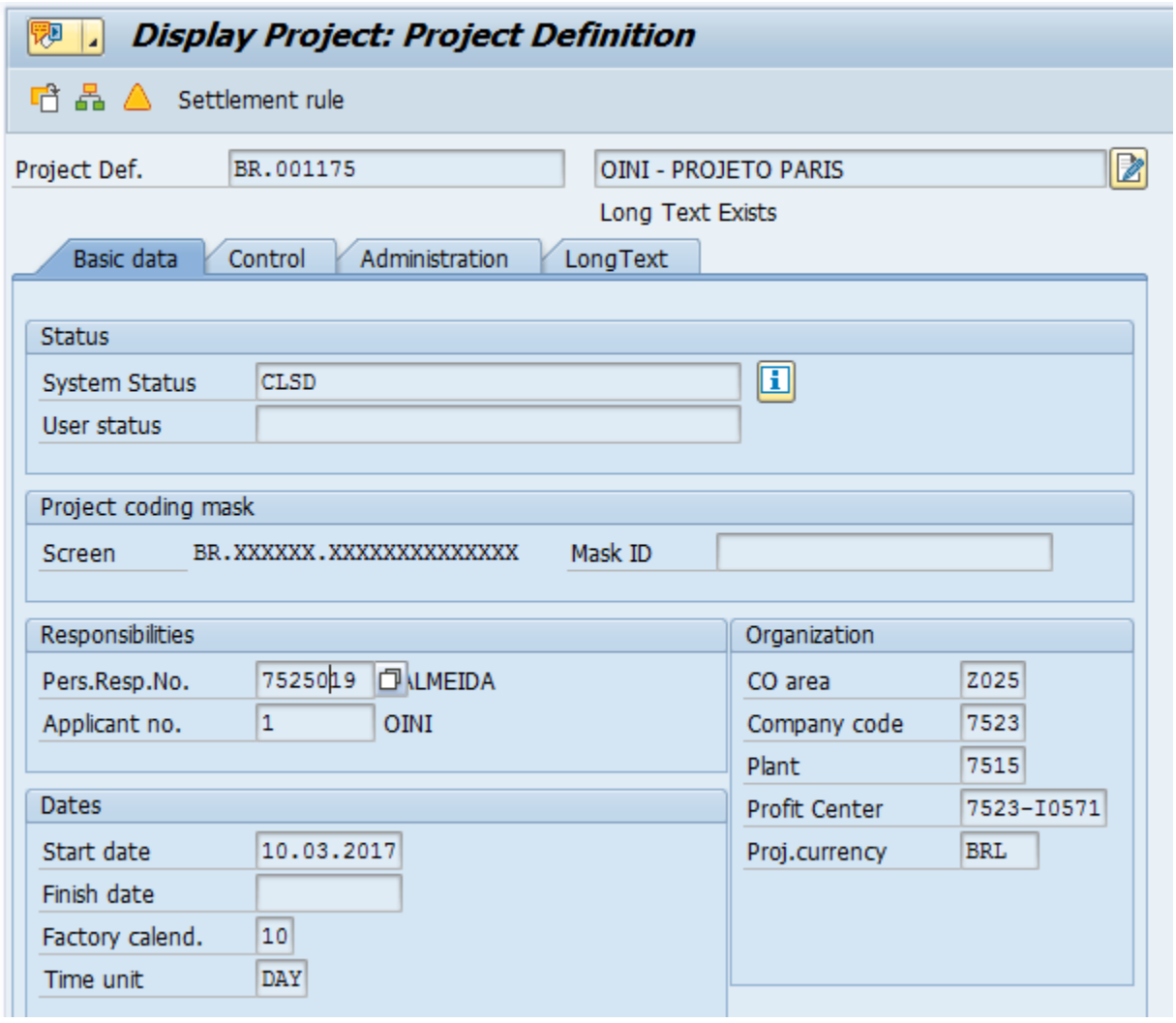
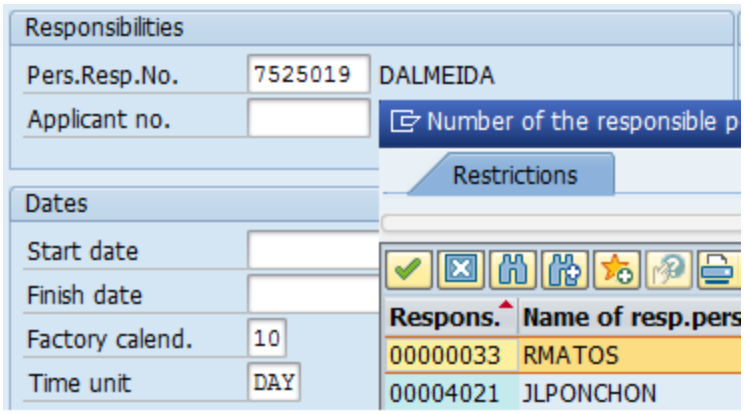
Centro de Custo Liberador	7515-5001
Centro de Lucro	7523-I0571
Categoria	30
Genero	C
KR$	Não estimado
Empresa	RHPA
Divisão	7523
Local	ACTW
Data Solicitada	10/03/2017
Solicitante	D. ALMEIDA

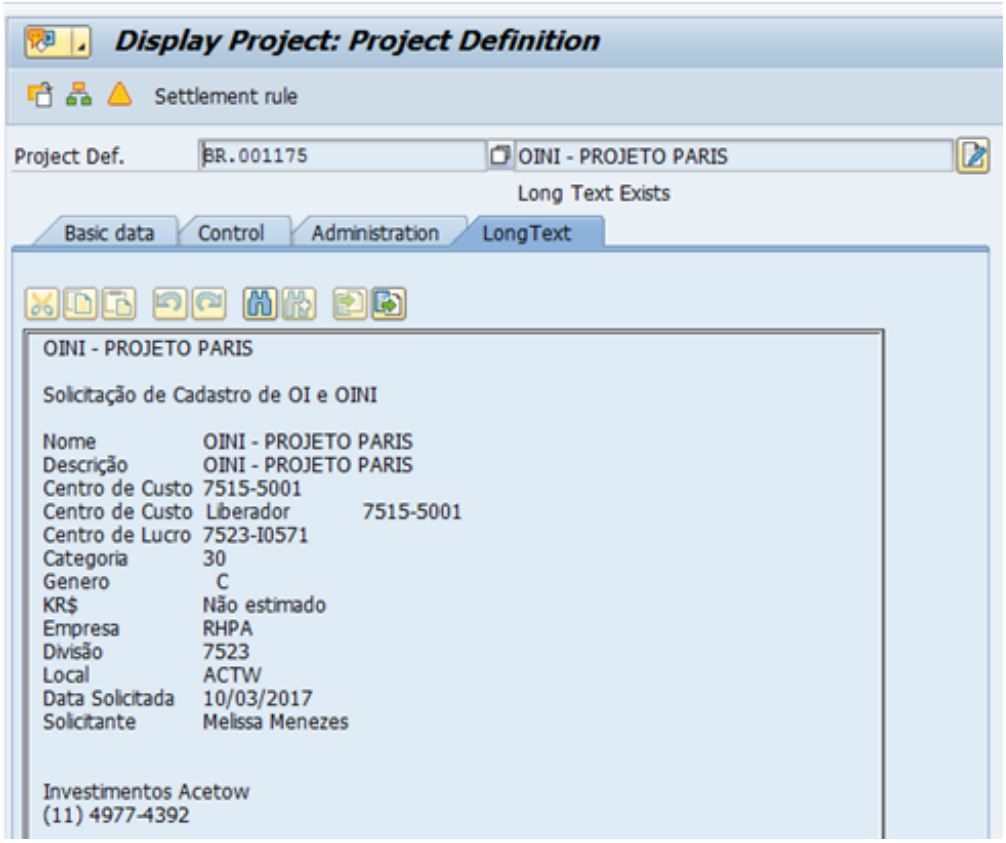


If you need to search for the responsible, click on the icon .

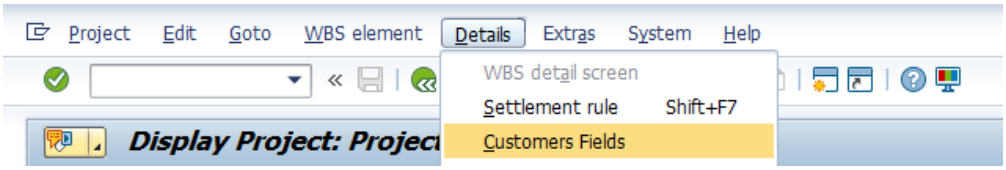
In case of doubt, search it in "Person responsible" tab.



In "Long text", insert all the information you received from the requester.

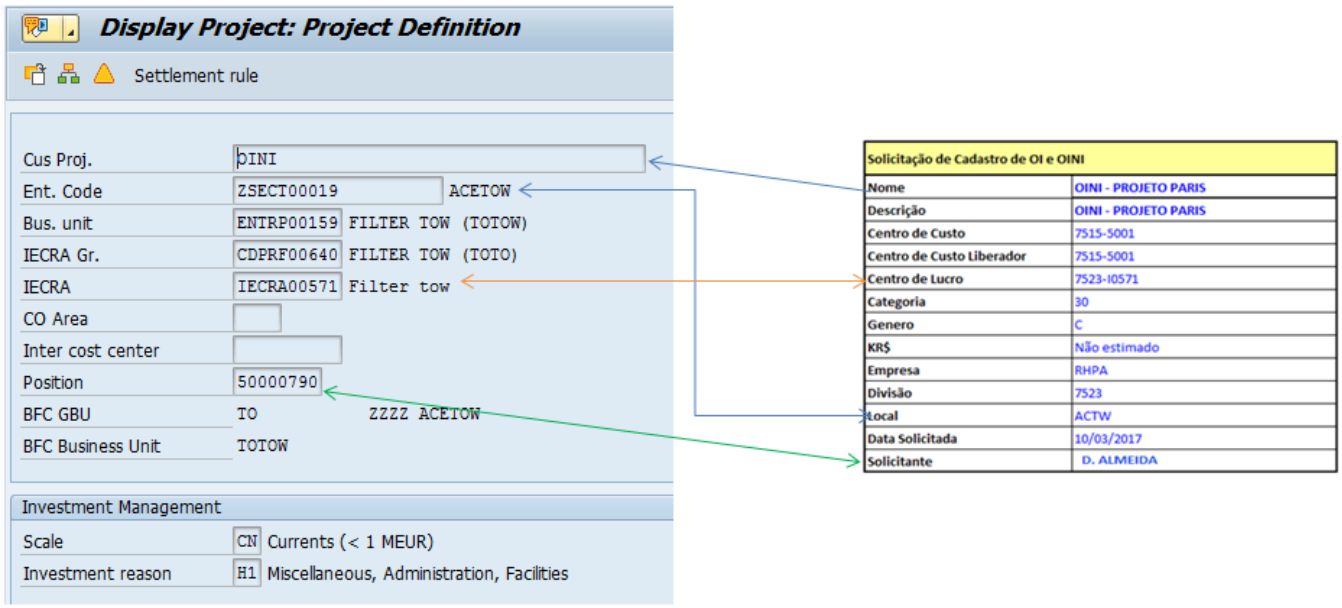


In the top of the screen, click on "Details" in the field "Customer Fields".

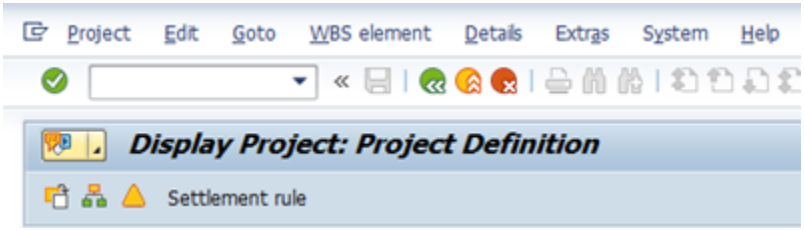


The IECRA must have the last digits of the profit center informed.

Add information in the fields that are in blank.



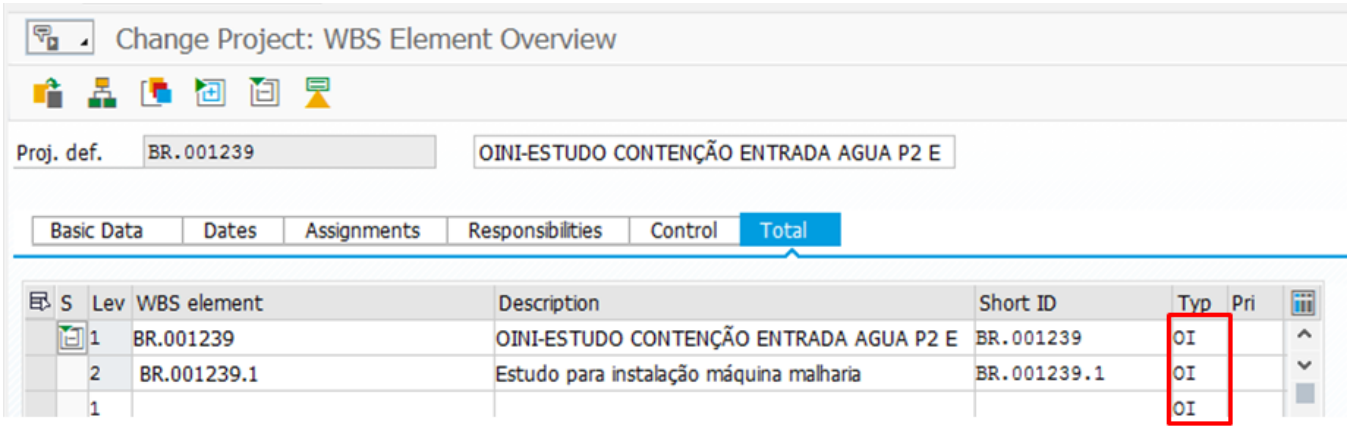
Click on to go back and then in the .

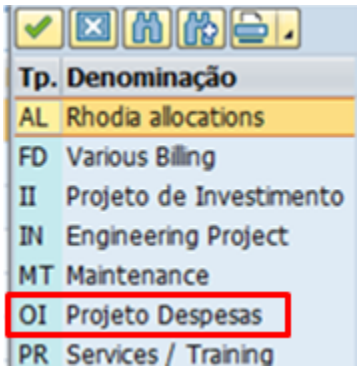


Here, you will include the assessment information.

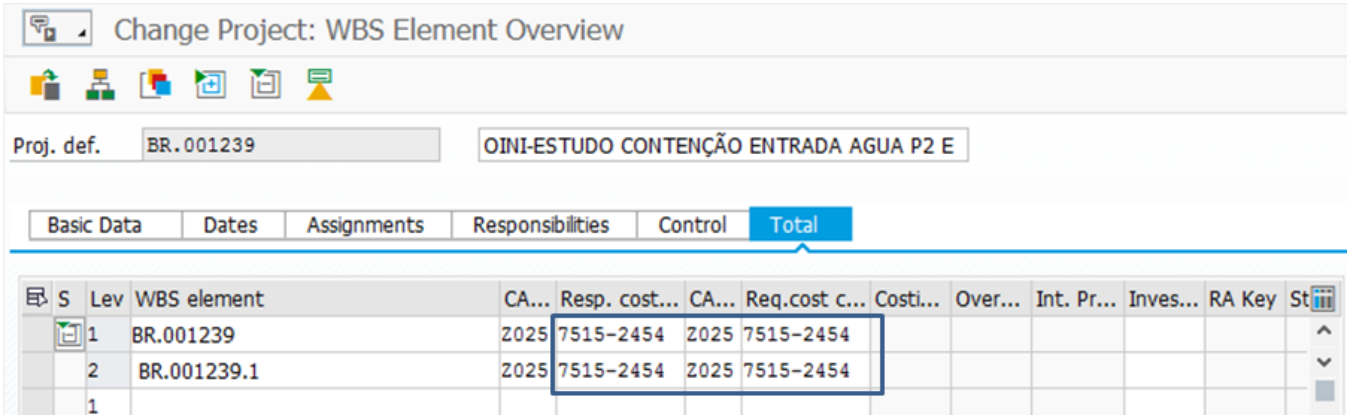
Three very important points of attention:

1. In the column "WBS element", it is necessary to add the level of the project (1 = heading, 2 = project and 3 = sub-project)
2. In the column "Type", add "OI"
3. The last line of the project should have a flag in the column "CICn" (to determine that this element receives costs)

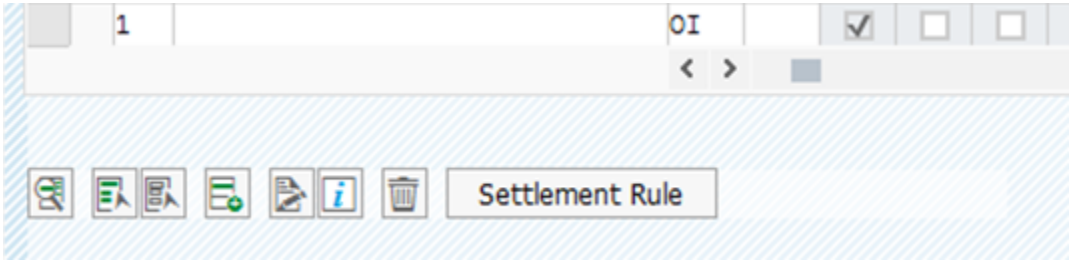




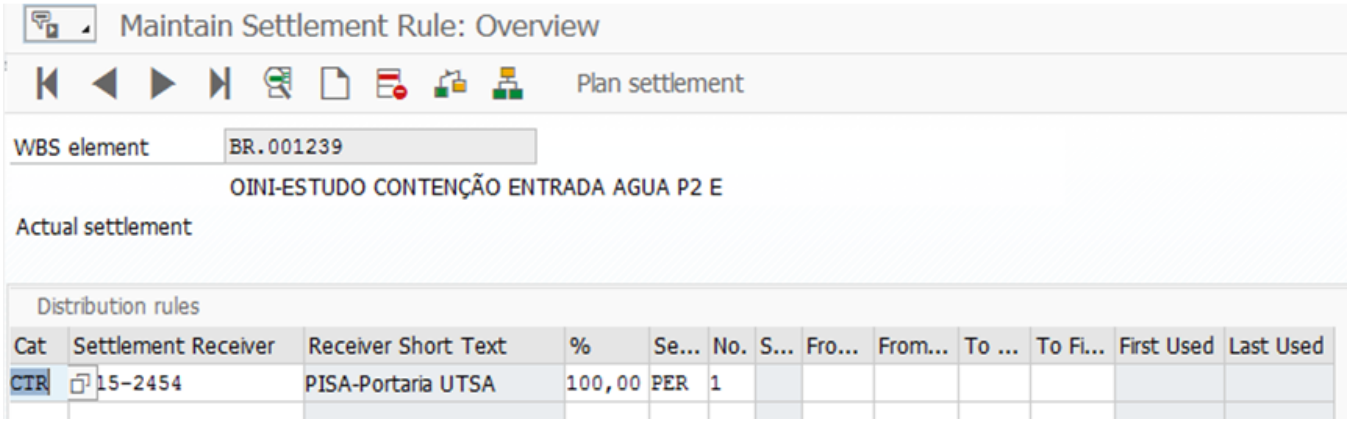
In "Total" tab, drag until the field "Cost Center" to add the number in the request.



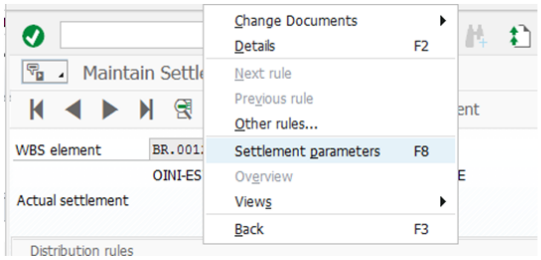
Go to Settlement Rule

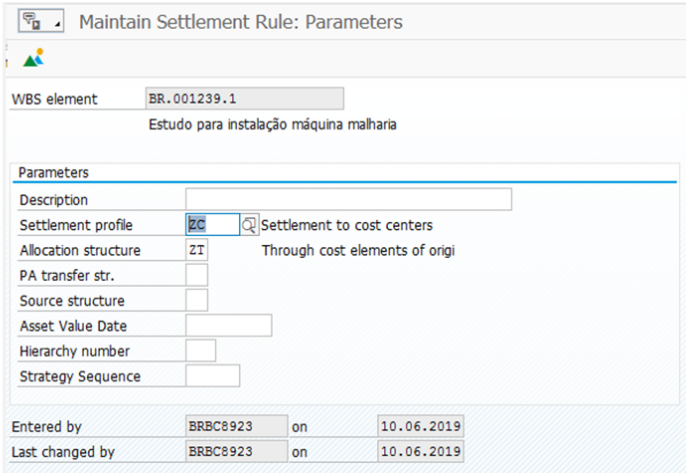


Fill in Cat with CTR and include the Cost Center in Settlement Receiver and press enter for the other information to be filled automatically

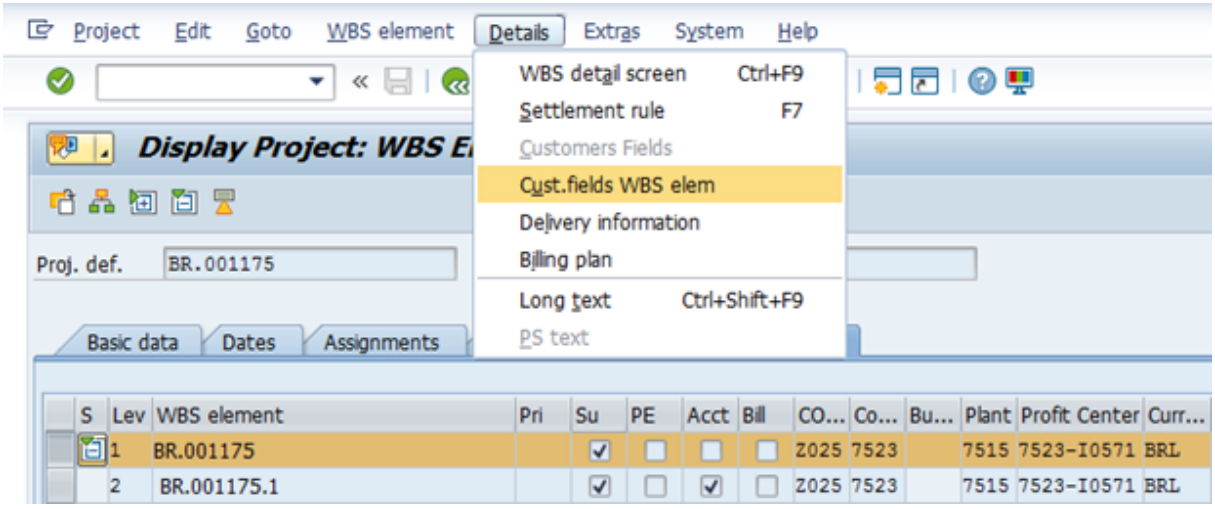


Go to Settlement Parameters and fill the Settlement Profile with ZC and the Allocation Structure with ZT to all the WBSs.





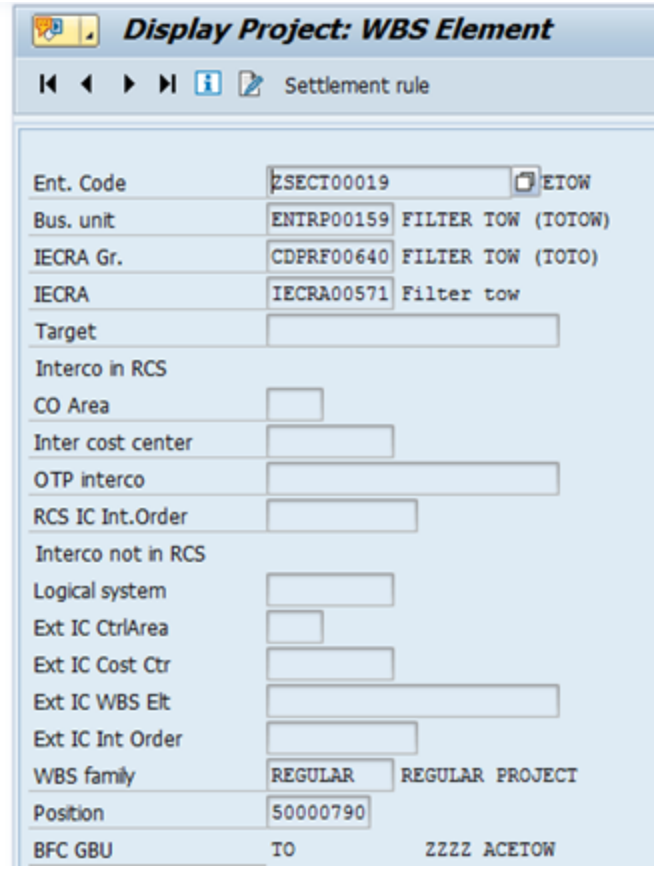
Select the line, go to "Details", "Cust. Fields WBS elem".



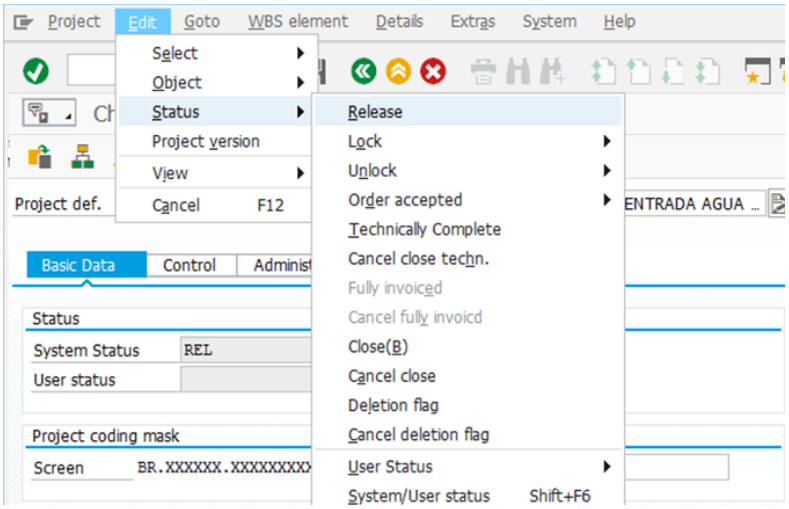
IECRA (it can be filled automatically)

WBS family (the standard is R&I)

Position (only if it is not filled automatically)



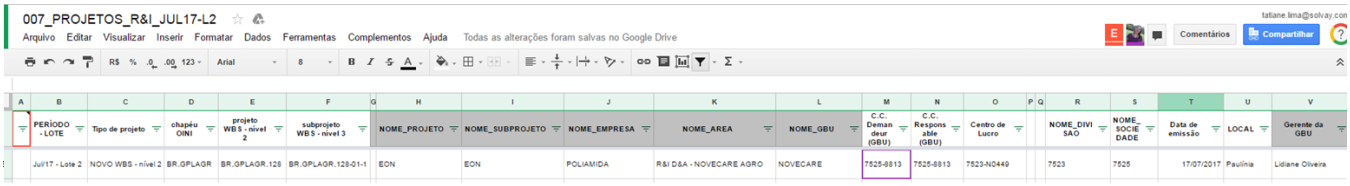
After created it's necessary to go back in the project and select all the WBSs. Enter the icon Project Definition and go to Edit, Status and Release



If the request is only for creation of the heading, save it and this process is finished.

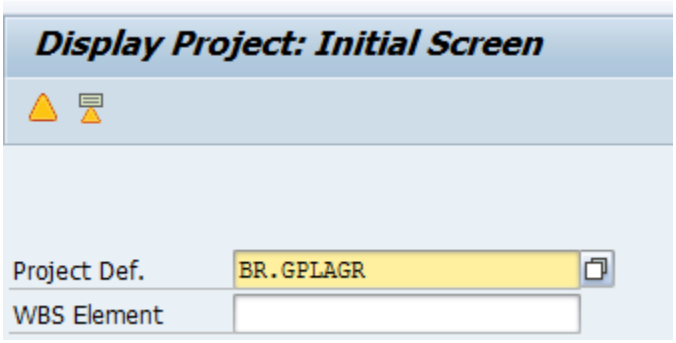
3.2. I add a project and a sub-project

When receiving a request like in the example, note that in column C is described to create the level 2 and consequently the level 3.



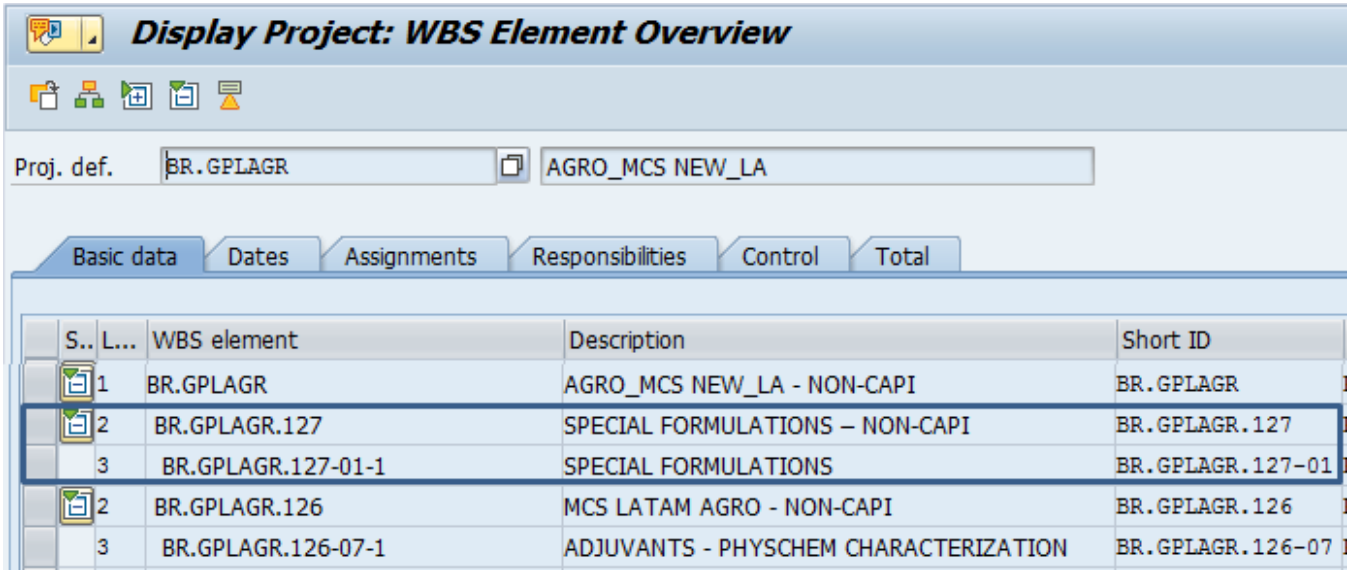
CJ02

Add the number of the project (heading). This way, it is possible to verify what was already created in this project.

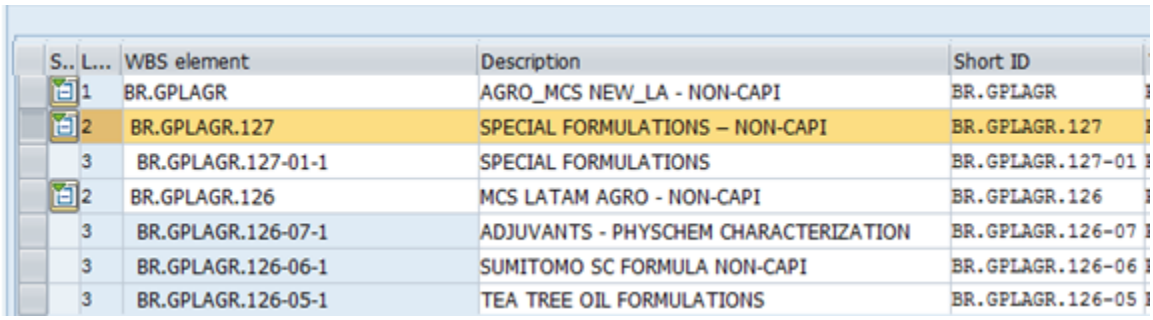


In this example, a project with several lines already created.

Note that the last line created is "BR.GPLAGR.127", consequently, the next one will be "BR.GPLAGR.128".

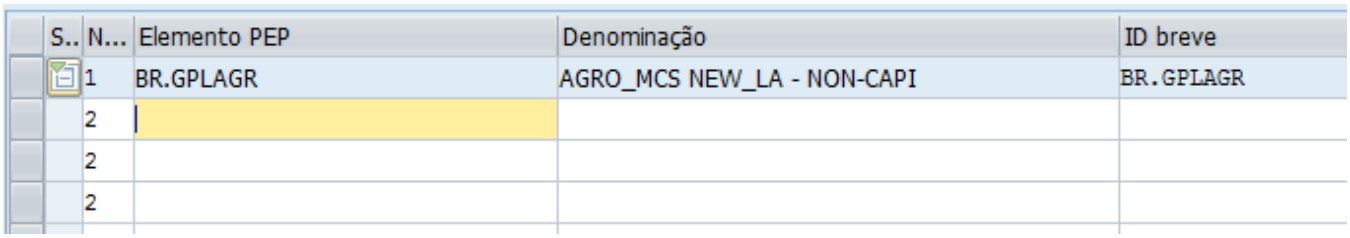


Select the line that will be under the line you are creating and click in the button to open the lines.



S..	L...	WBS element	Description	Short ID
	1	BR.GPLAGR	AGRO_MCS NEW_LA - NON-CAPI	BR.GPLAGR
	2	BR.GPLAGR.127	SPECIAL FORMULATIONS – NON-CAPI	BR.GPLAGR.127
	3	BR.GPLAGR.127-01-1	SPECIAL FORMULATIONS	BR.GPLAGR.127-01
	2	BR.GPLAGR.126	MCS LATAM AGRO - NON-CAPI	BR.GPLAGR.126
	3	BR.GPLAGR.126-07-1	ADJUVANTS - PHYSCHEM CHARACTERIZATION	BR.GPLAGR.126-07
	3	BR.GPLAGR.126-06-1	SUMITOMO SC FORMULA NON-CAPI	BR.GPLAGR.126-06
	3	BR.GPLAGR.126-05-1	TEA TREE OIL FORMULATIONS	BR.GPLAGR.126-05

More lines will be open.

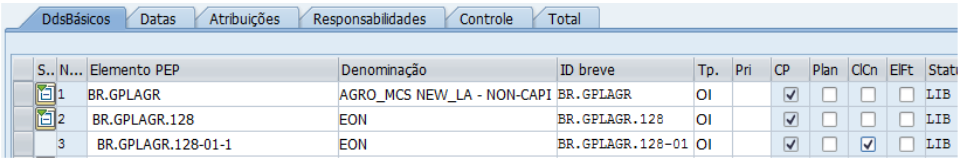


S..	N...	Elemento PEP	Denominação	ID breve
	1	BR.GPLAGR	AGRO_MCS NEW_LA - NON-CAPI	BR.GPLAGR
	2			
	2			
	2			

For adding the project and sub-project, note the 3 very important information:

1. In the second column, add the number 2 for projects and number 3 for sub-projects
2. In the column "Type", add "OI"
3. The last level should have a flag in the column "CICn" (to determine that the costs will be allocated in this element)

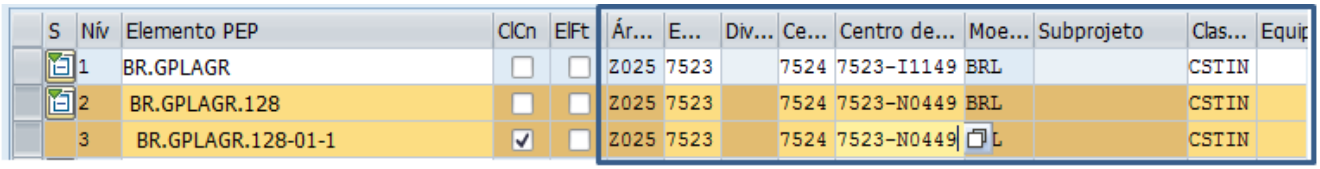
   In this example, the last line is the third of the sub-project



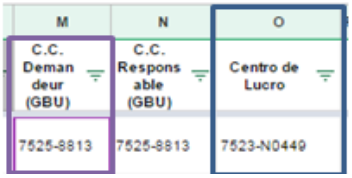
DdsBásicos | Datas | Atribuições | Responsabilidades | Controle | Total

S..	N...	Elemento PEP	Denominação	ID breve	Tp.	Pri	CP	Plan	ClCn	ElFt	Stat
	1	BR.GPLAGR	AGRO_MCS NEW_LA - NON-CAPI	BR.GPLAGR	OI		☑	☐	☐	☐	LIB
	2	BR.GPLAGR.128	EON	BR.GPLAGR.128	OI		☑	☐	☐	☐	LIB
	3	BR.GPLAGR.128-01-1	EON	BR.GPLAGR.128-01	OI		☑	☐	☑	☐	LIB

In the last tab "TOTAL", check the profit center.



S	Nív	Elemento PEP	ClCn	ElFt	Ár...	E...	Div...	Ce...	Centro de...	Moe...	Subprojeto	Clas...	Equip
	1	BR.GPLAGR	☐	☐	2025	7523		7524	7523-I1149	BRL		CSTIN	
	2	BR.GPLAGR.128	☐	☐	2025	7523		7524	7523-N0449	BRL		CSTIN	
	3	BR.GPLAGR.128-01-1	☑	☐	2025	7523		7524	7523-N0449	L		CSTIN	



M	N	O
C.C. Demandeur (GBU)	C.C. Responsable (GBU)	Centro de Lucro
7525-8813	7525-8813	7523-N0449

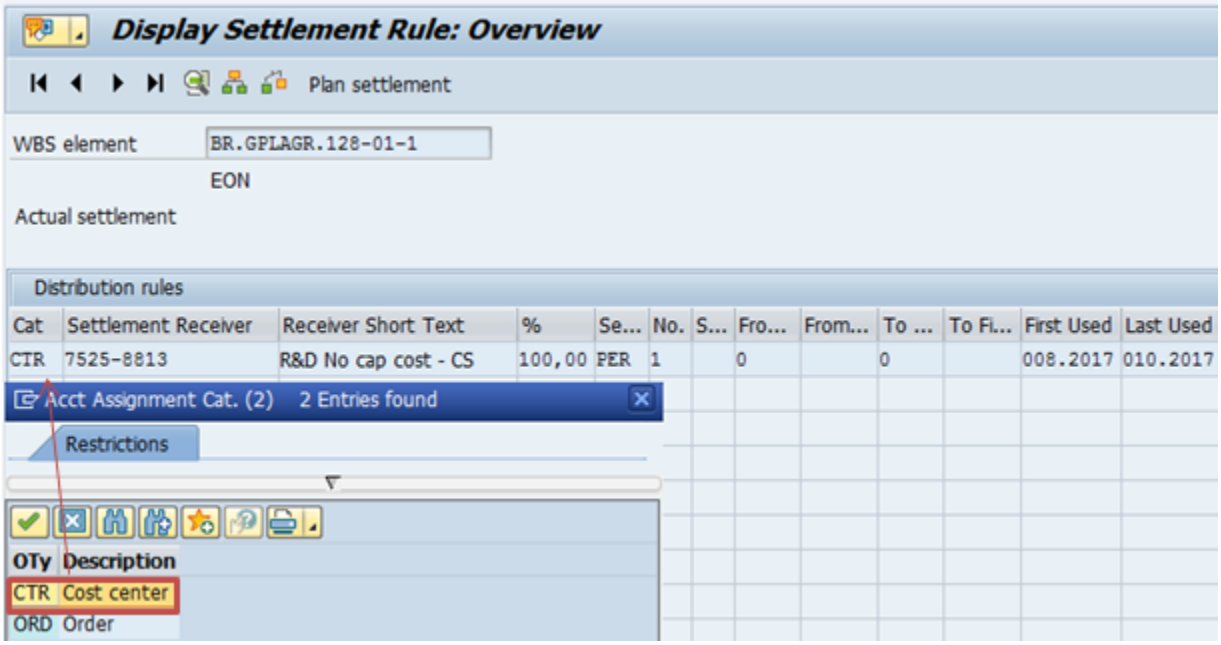
Add the cost center, after clicking on ENTER, the area will be informed automatically.

S	Nív	Elemento PEP	Requerente	Ár...	Cen.cst.re...	Ár...	Cen.cst.so...
	1	BR.GPLAGR		2025	7525-8813	2025	7525-8813
	2	BR.GPLAGR.128			7525-8813		7525-8813
	3	BR.GPLAGR.128-01-1			7525-8813		7525-8813

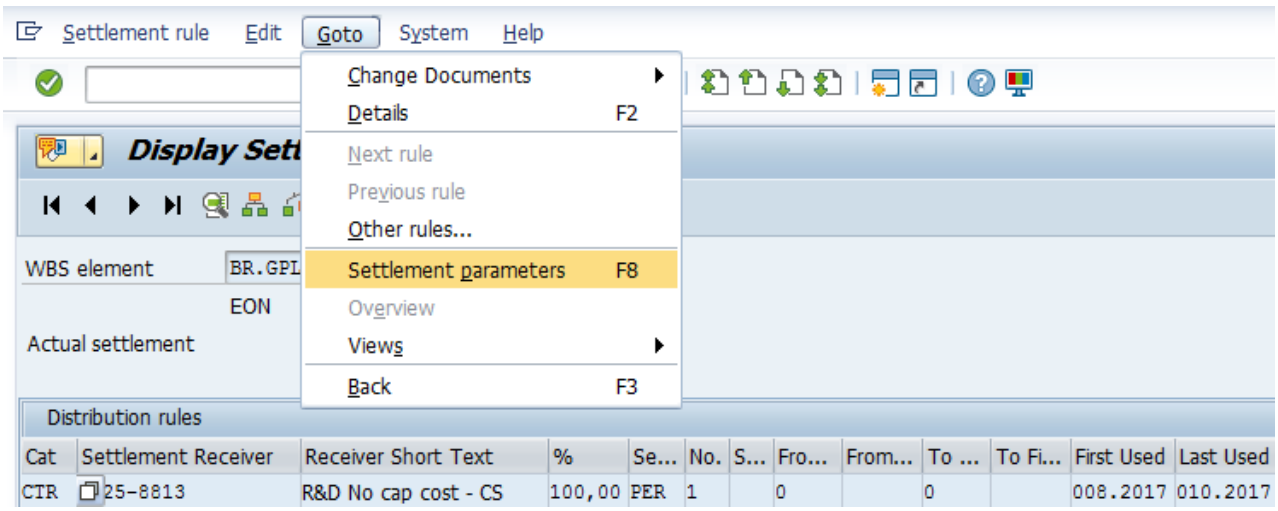
After that, with the selected lines go to the bottom of the screen and click on "Settlement Rule".

It is necessary to determine the assessment of the project.

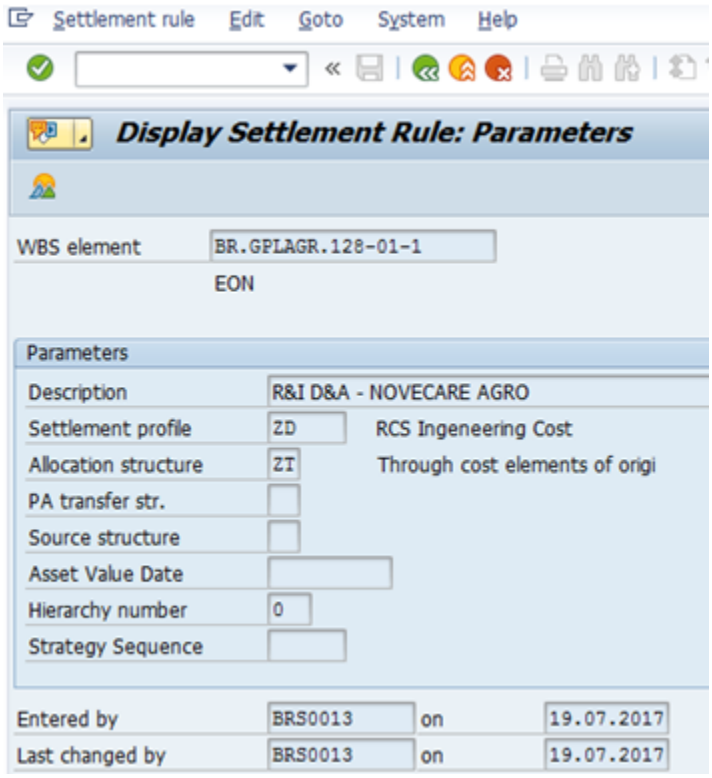
In the first column, add the option "CTR", in the second column add the cost center and after clicking on ENTER, other information will be filled automatically.



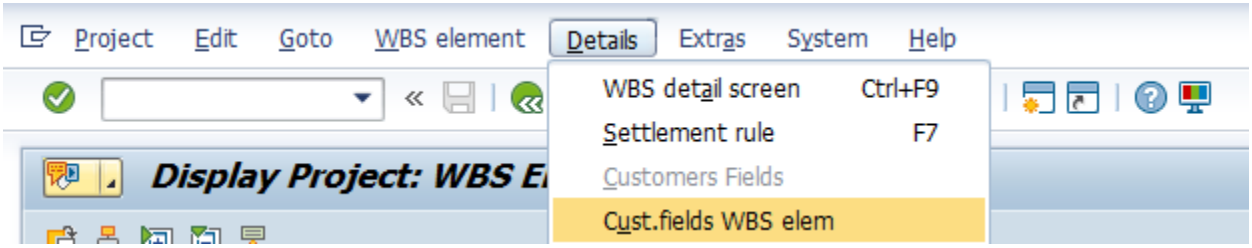
In the top of the screen, click on "Goto" and select "Settlement parameters".



In the "Allocation Structure" field, add the abbreviation "ZT".

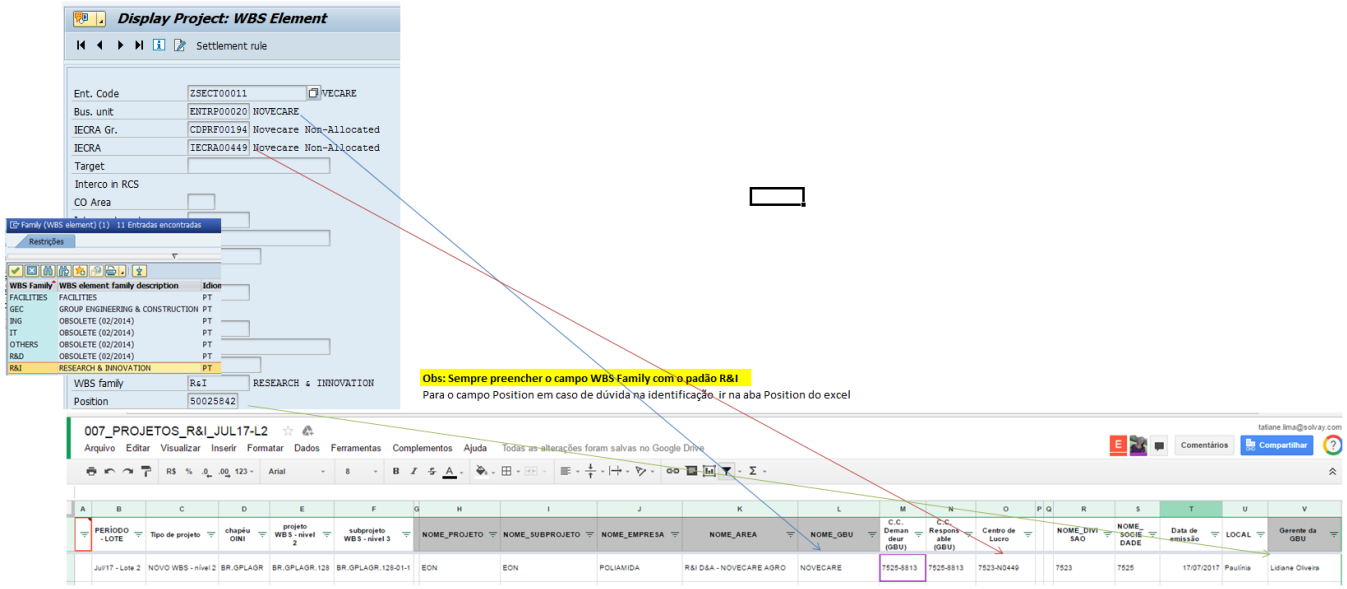


Click on to go back, select the line created, go to "Details" and then on "Cust.fields WBS elem".



Fill the IECRA (with the same last digits of the profit center indicated in the request).

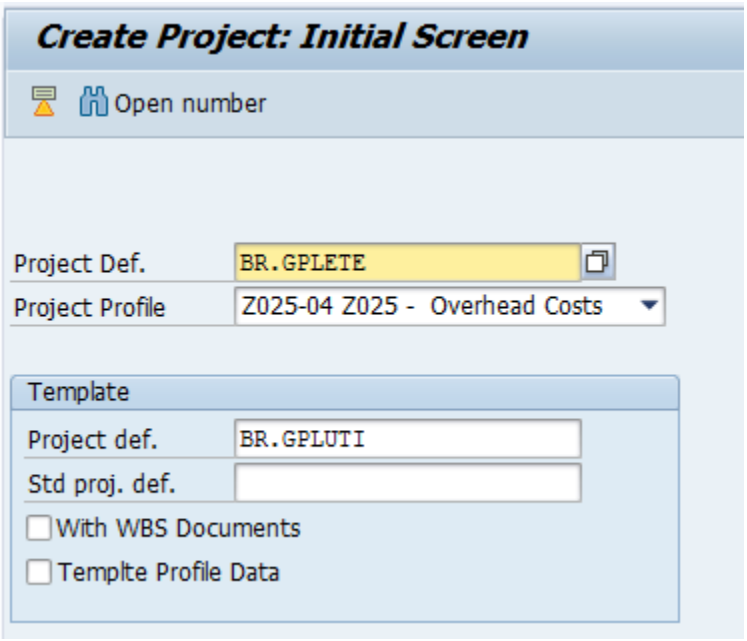
Complete the other fields in blank.



Go back and save it .

3.3. I create a project with a reference

For creating a project with reference to another one, just inform the project to be used as reference in box "Template", field "Project def."

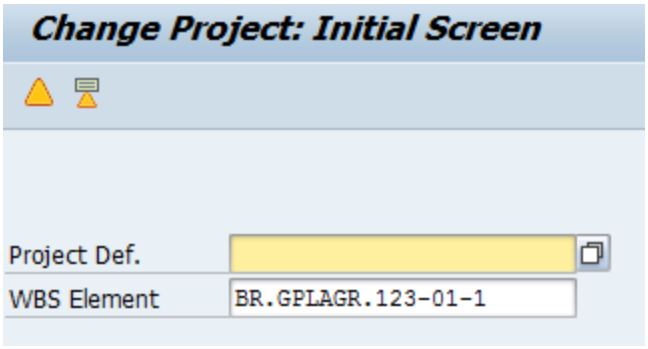


3.4. I close a project

The requester opens a ticket and add a file in Google Drive.

Def.proj.	WBS element	Name		CódEIC	NºResp	CentCul	CentCu	Responsáv.	Posição	Status			Cen.luc	CódElem			ÁrCont	Unid. Ne
BR.GPLAGR	BR.GPLAGR.123-01-1	SEED TREATMENT - ATLANTICA	3	X	7525176	7525-8813	7525-8813	Lidiane Oliveira	50025482	LIB NOLQ // TCRA		RD	7523-I1149		7524		Z025	ENTRP00020
BR.GPLAUG	BR.GPLAUG.101-01-1	D&A AUGEO CLEAN	3	X	7525179	7525-8803	7525-8803	Maria Angela Pereira	50004566	LIB NOLQ // TCRD		RD	7523-I1207		7525		Z025	ENTRP00156
BR.GPLAUG	BR.GPLAUG.101-02-1	D&A AUGEO OCTO	3	X	7525179	7525-8803	7525-8803	Maria Angela Pereira	50004566	LIB NOLQ // TCRD		RD	7523-I1207		7525		Z025	ENTRP00156

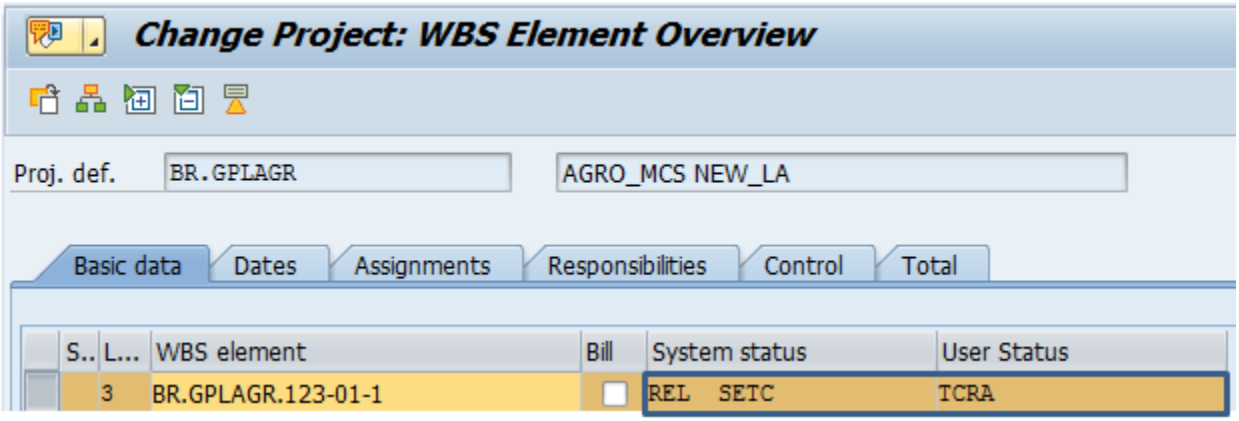
Inform the codification of the project.



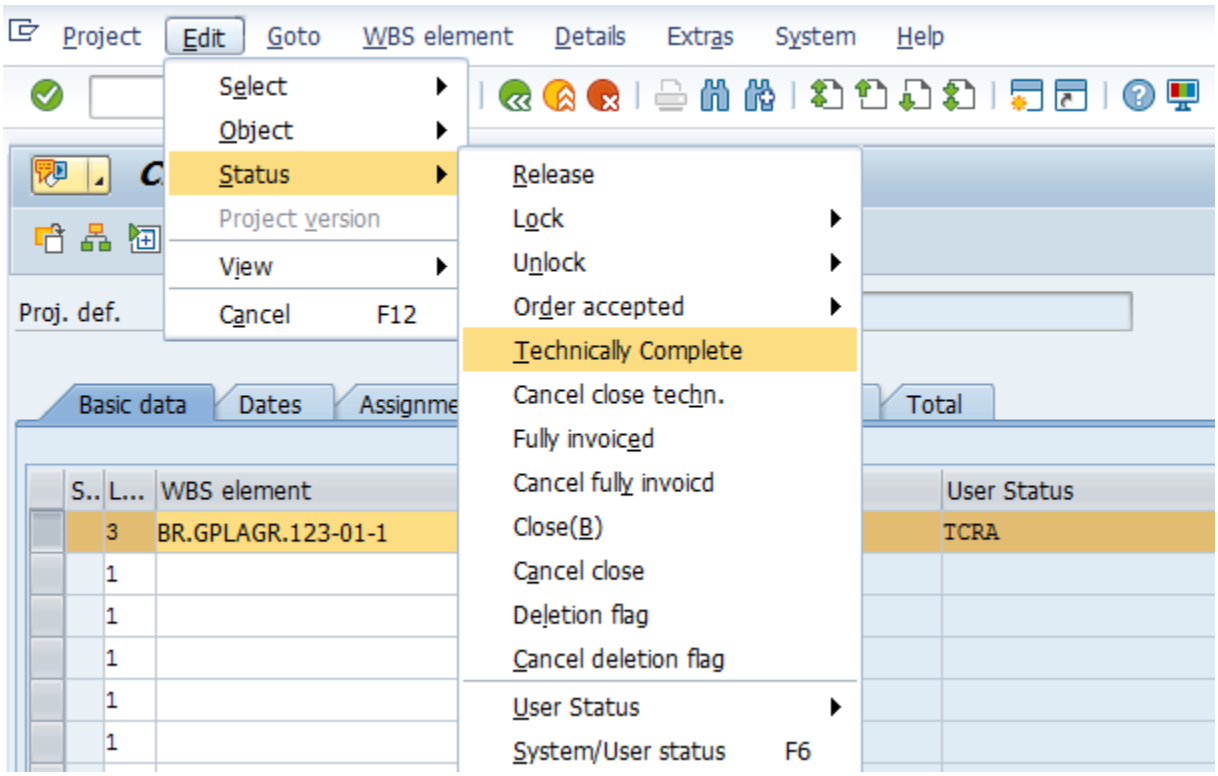
ENTER

Select the line.

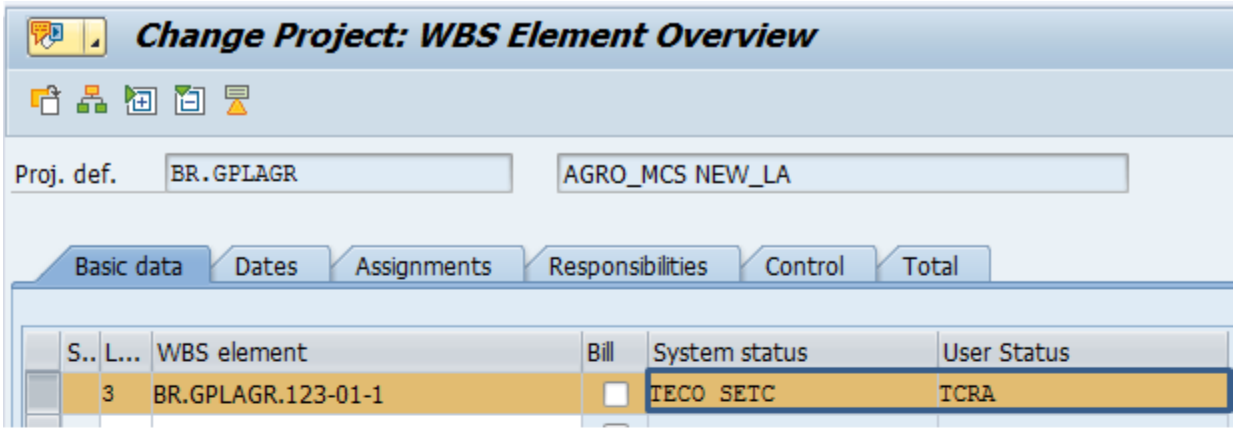
Verify which is the status.



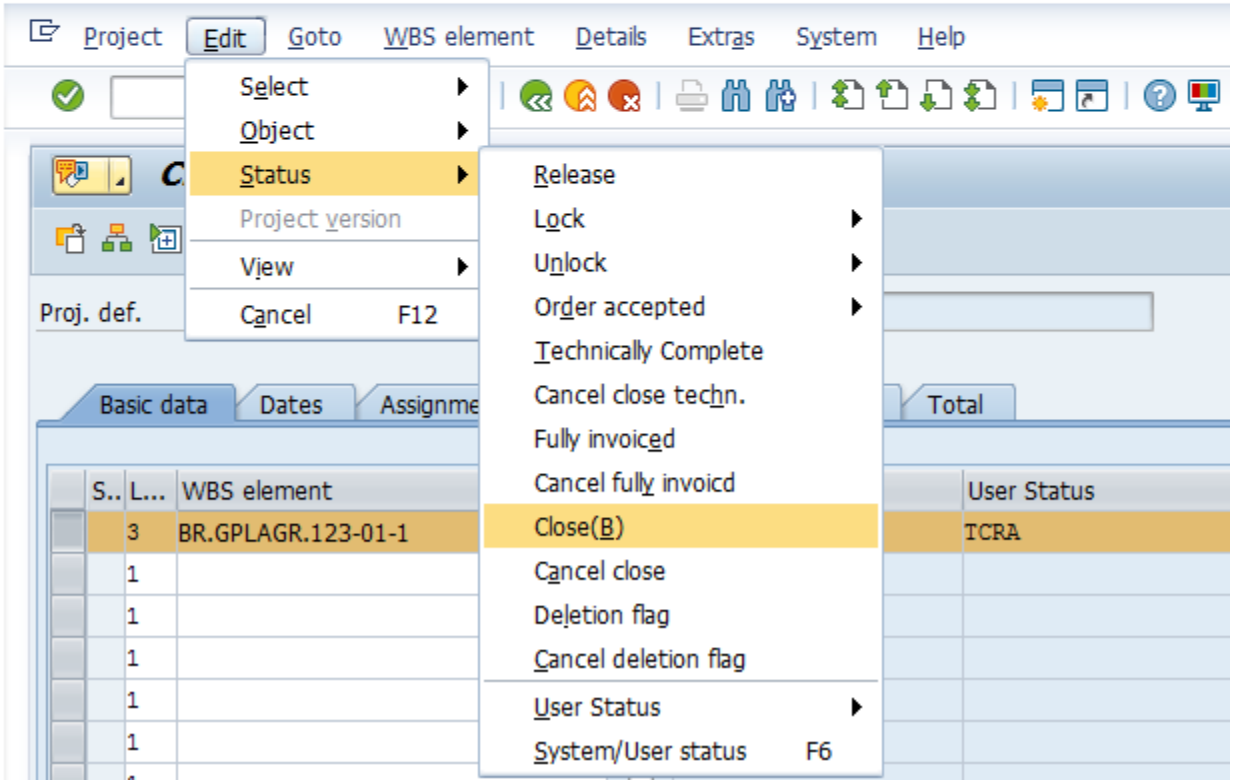
First of all, block the project going to menu "Edit", click on "Status" and then on "Technically Complete".



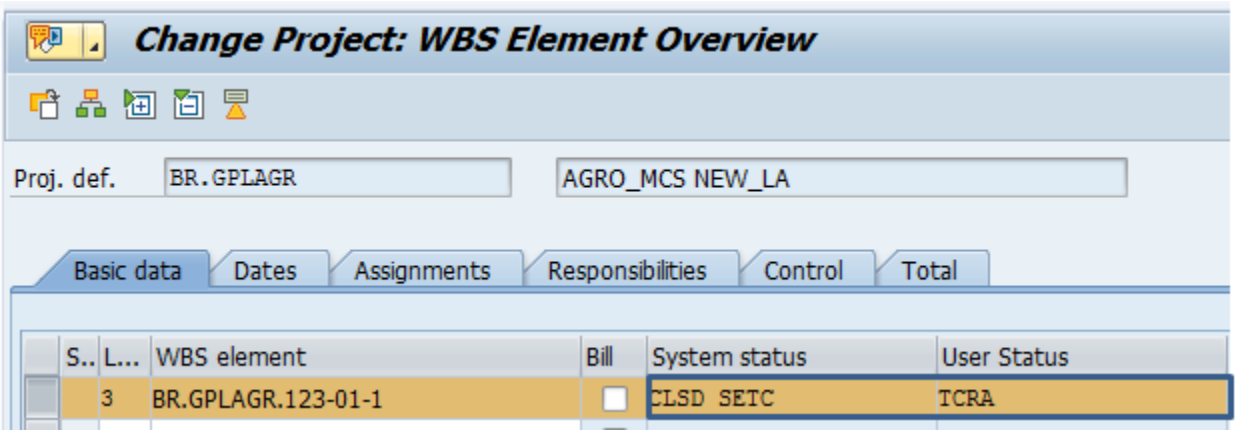
The new status will be "TECO".



Depois ir em Edit - Status - CloseB



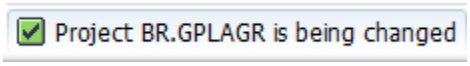
Then, go to "Edit", click on "Status" and then on "Close (B)".



The status will be "CLSD SETC".

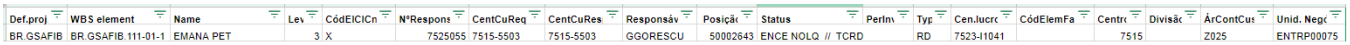
Save it .

And see the final message.

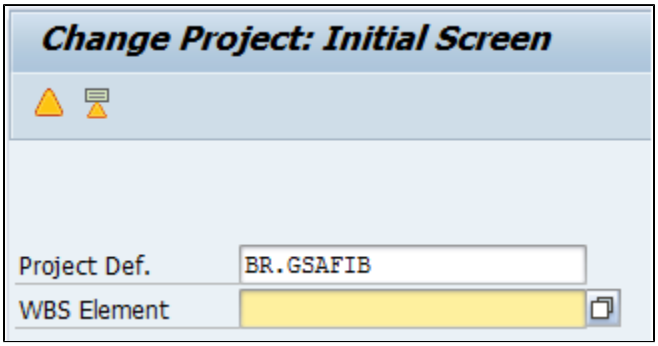


3.5. I activate a project

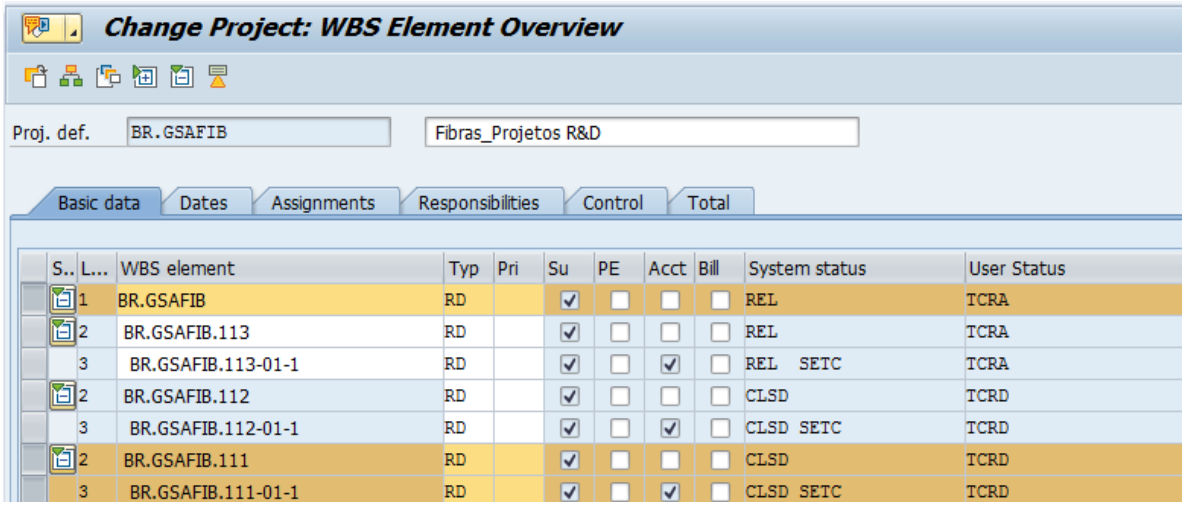
It is necessary to unblock the heading, then the project and then the sub-project.



CJ02

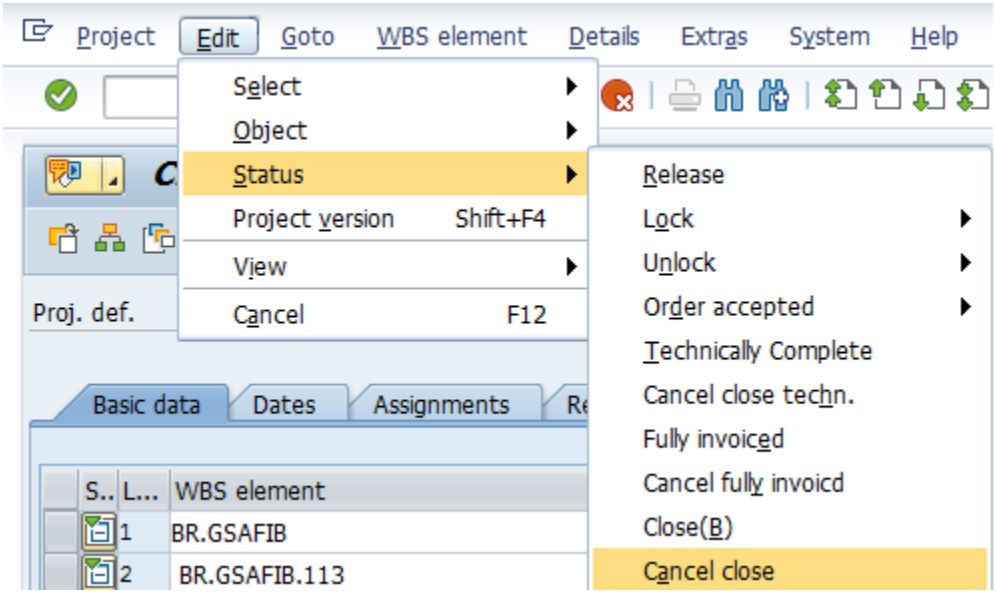


In this case, the heading is open but the project and the sub-project are closed.

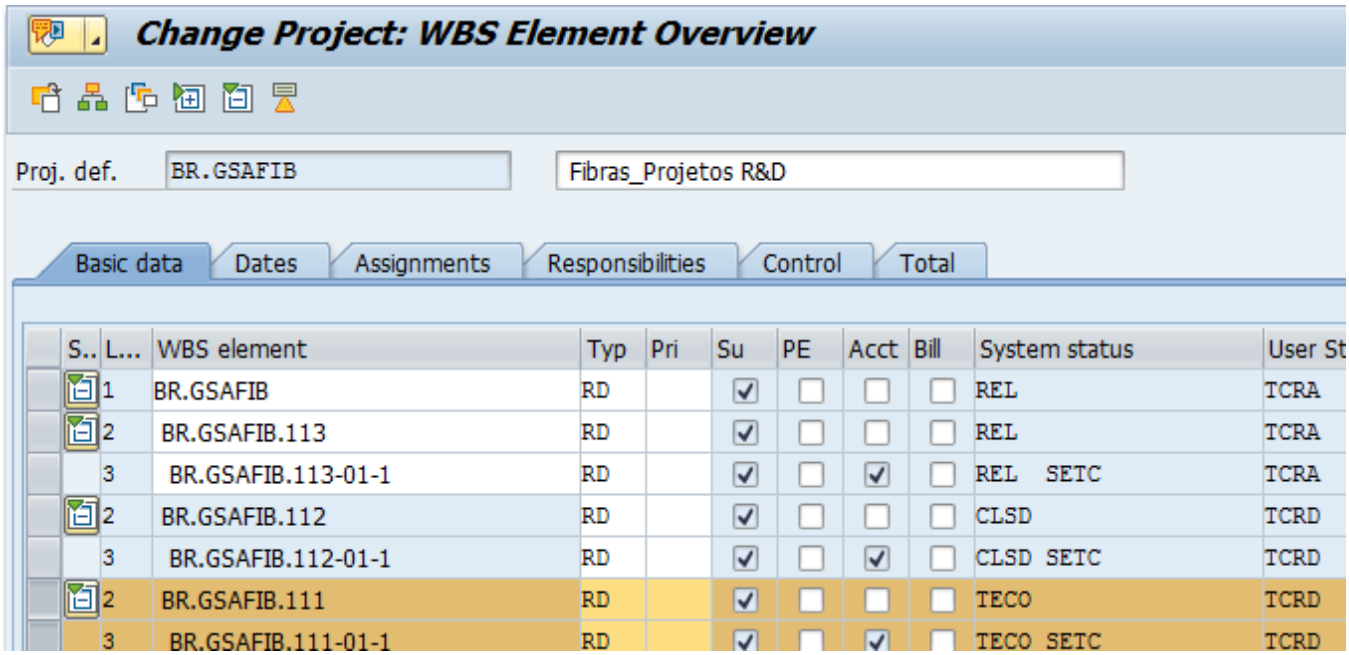


Select the blocked lines.

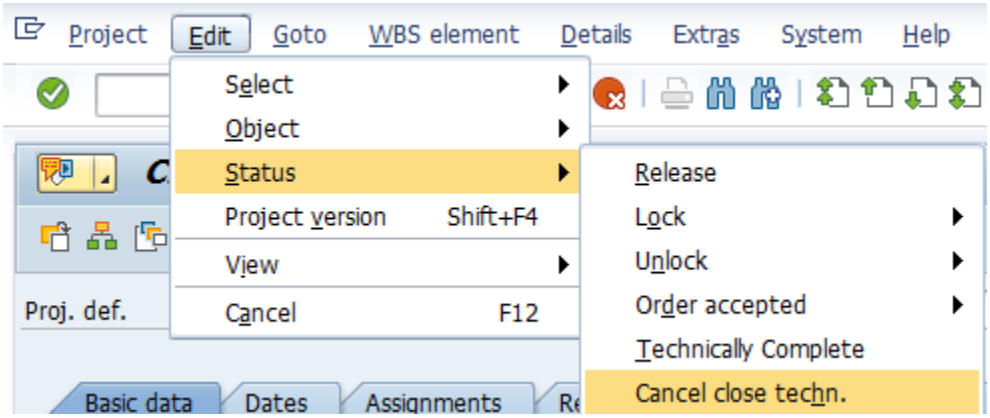
Go to "Edit", click on "Status" and then on "Cancel close".



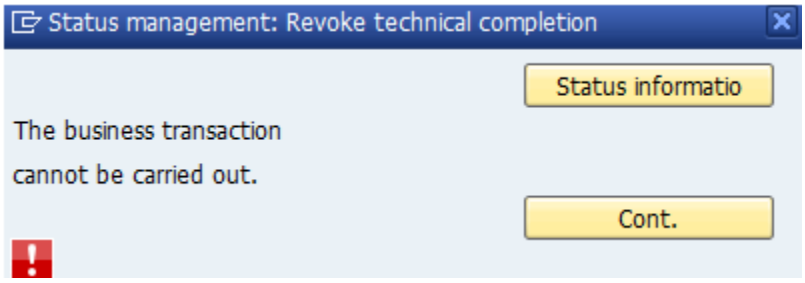
The status will be "TECO".



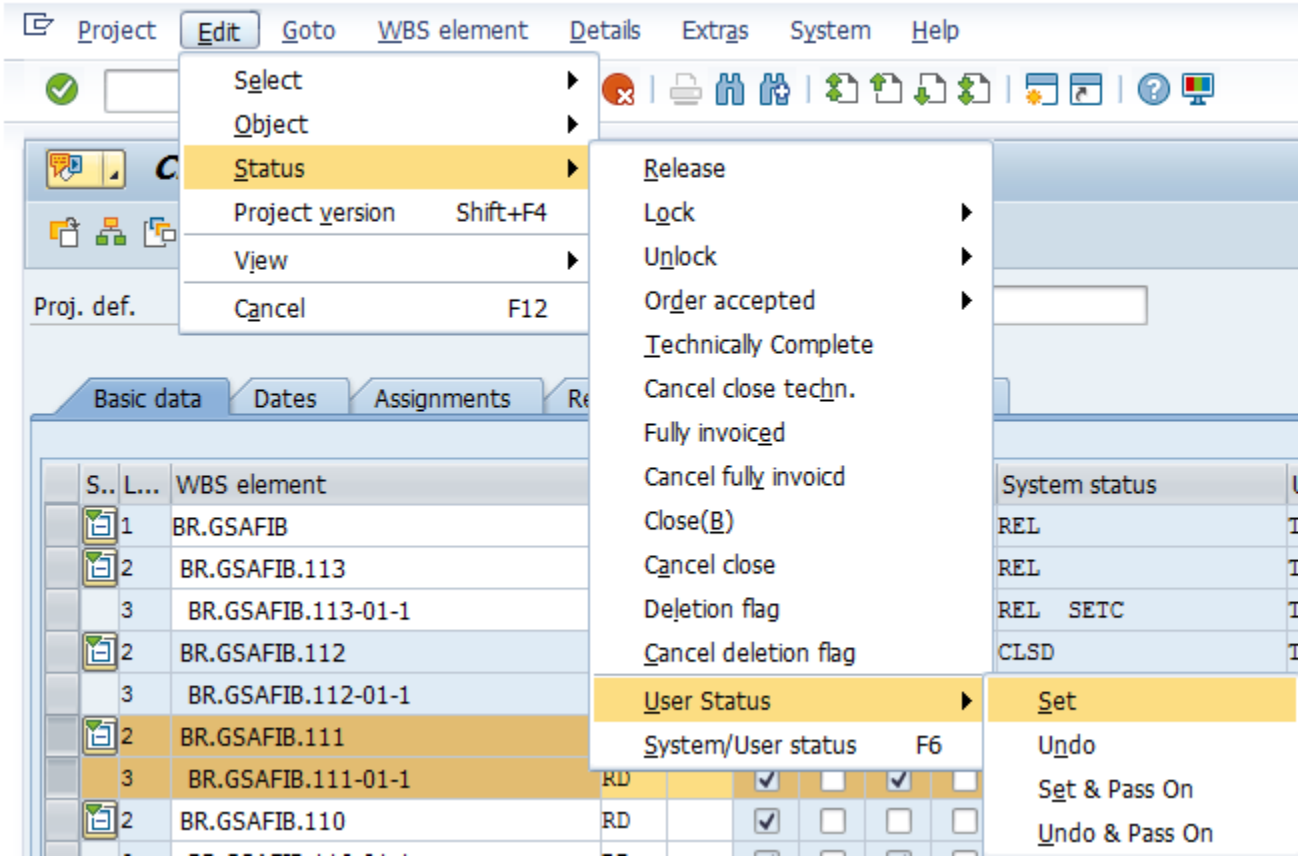
Go to "Status" and click on "Cancel close techn.".



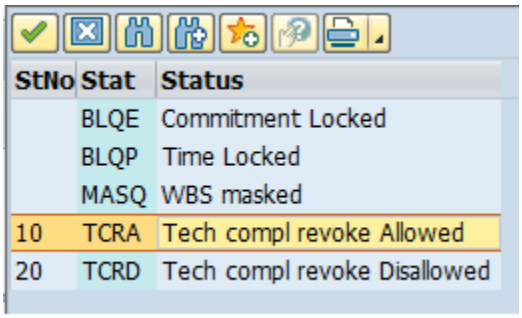
Probably, you will receive an error message.



Go to "Status", click on "User Status" and then "Set".

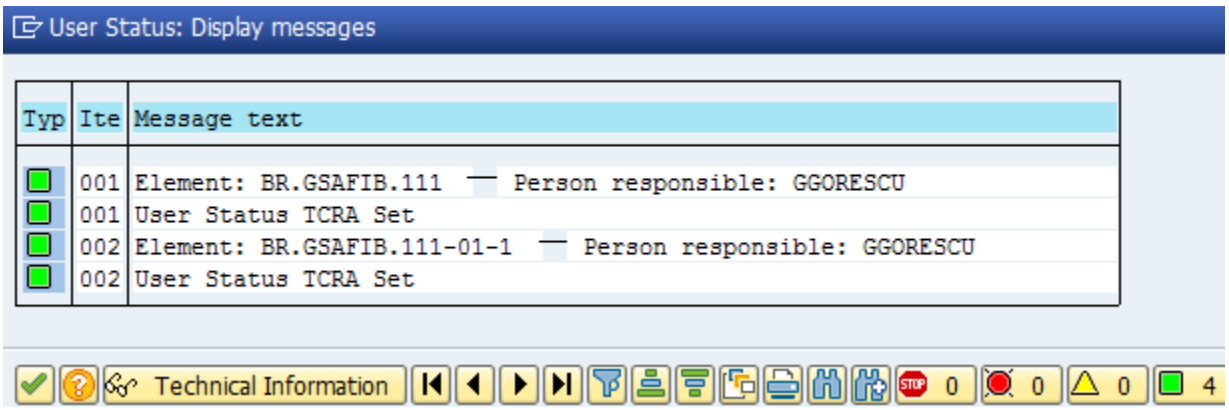


Click twice on "Tech compl revoke Allowed".



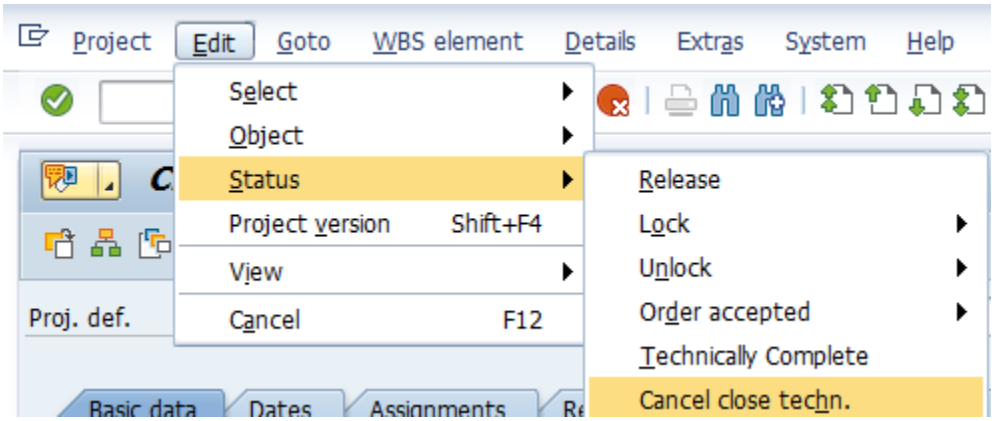
StNo	Stat	Status
	BLQE	Commitment Locked
	BLQP	Time Locked
	MASQ	WBS masked
10	TCRA	Tech compl revoke Allowed
20	TCRD	Tech compl revoke Disallowed

You will receive the following message.

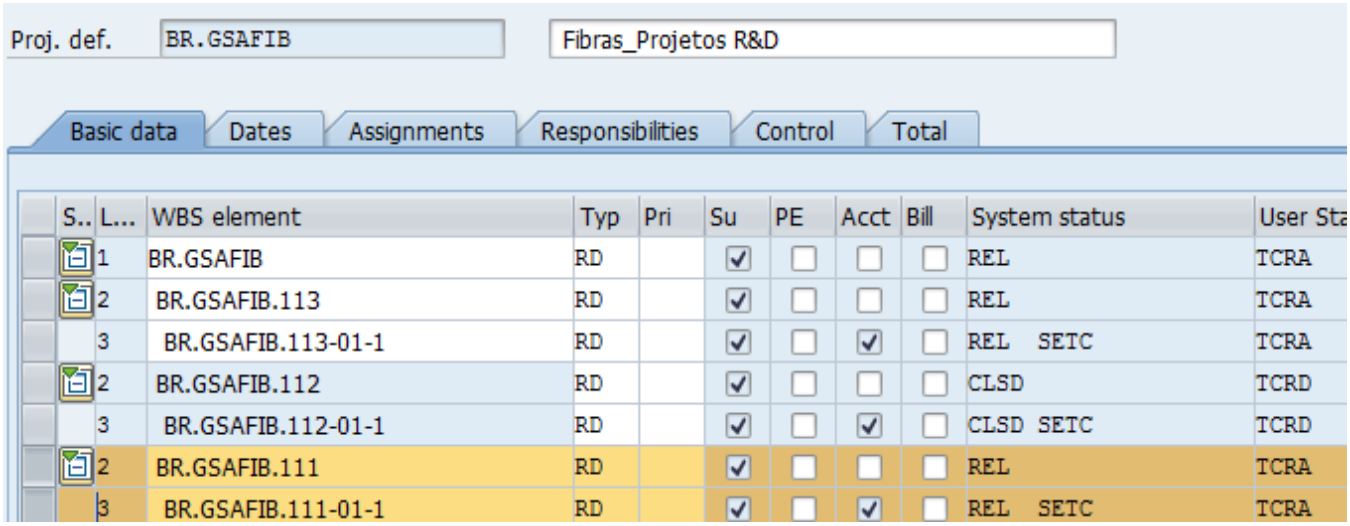


Click on .

Do the step again: Go to "Status", click on "Cancel close techn.".



The status will change.



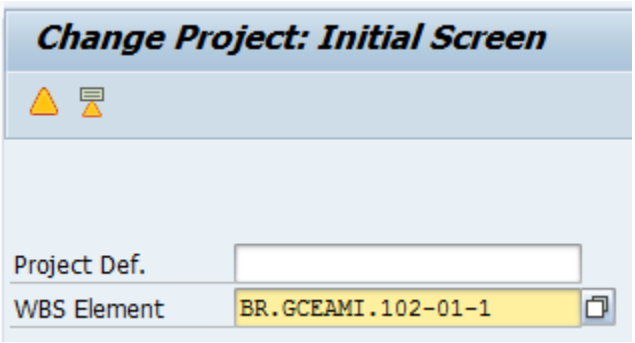
Save it .

3.6. I change the name of the project

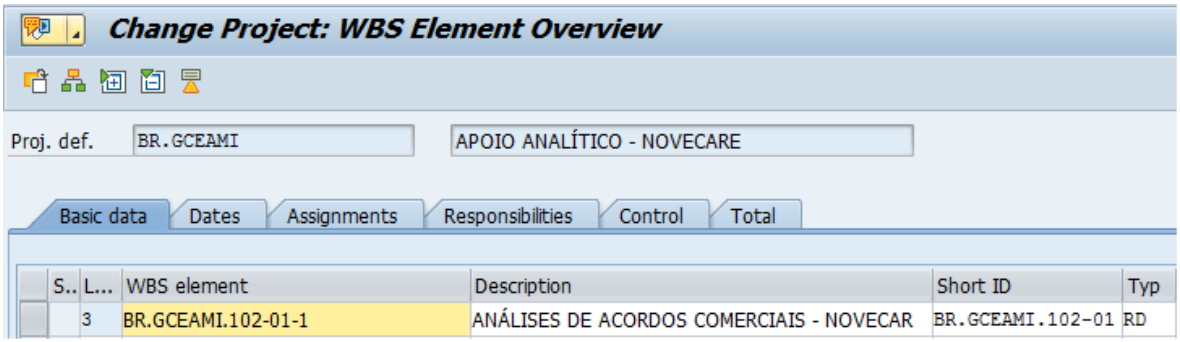
The requester will send the information in the template.

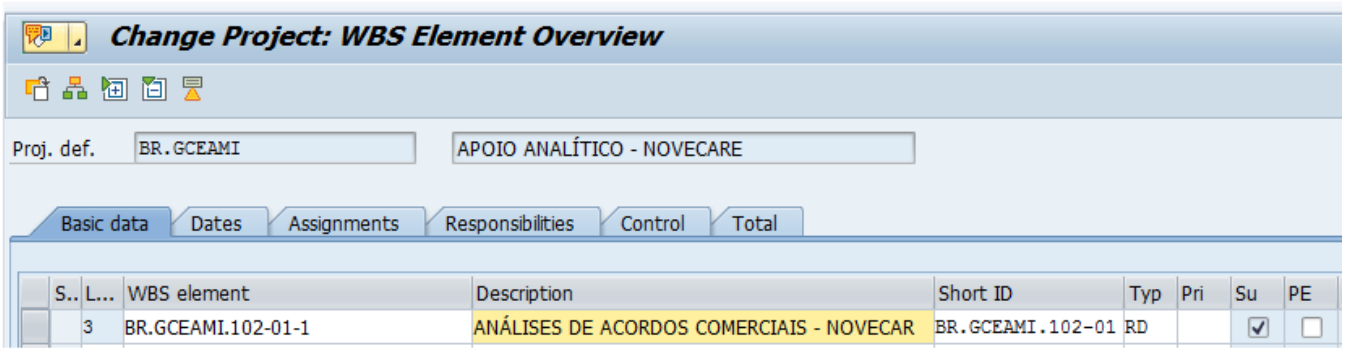
Go to transaction CJ02.

Inform the codification of the project.



Change the description according to the information in the template .





Save it .

End of document.