

CJ01 - Create Project

STEP 1

Enter Transaction **CJ01**

Create Project: Initial Screen

⌚ 📄 Open number

Project Def.

Project Profile

Template

Project def.

Std proj. def.

☐ With WBS Documents

☐ Template Profile Data

STEP 2

Insert the **project definition** and choose the **project profile** according to the plant of the company. This information is available in the template received.

i The **Project Profile** should be always “**XXX_project R&D (BA XXXX)**”.

Enter ↵

⌚ 📄 Open number

Project Def.

Project Profile

Template

Project def.

Std proj. def.

☐ With WBS Documents

☐ Template Profile Data

NHA_investment profile 7360 - Solvay HQ

NHA_investment profile 7470 - Solvay HQ

NHA_investment profile 7610 - Solvay HQ

NHA_investment profile 7650 - Solvay HQ

NHA_investment profile 8500 - Solvay HQ

NHA_investment profile 8890 - Solvay HQ

NHA_project R&D (BA 8890)

NHC_investment profile 7010

NHC_investment profile 7250

NHC_investment profile 7310

STEP 3

- Include the **Project Name** send in the template
- Check if the **Business Area** is correctly filled.

Create Project: Project Definition

⌚ ⚠ Settlement rule

Project Def.

Basic data Control Administration LongText

Status

System Status **i**

User status

Project coding mask

Mask ID

Responsibilities

Person Respons.

Applicant no.

Dates

Start date

Finish date

Factory calend.

Time unit

Organization

CO area

Company code

Business area

Plant

Location

Profit Center

Proj.currency

STEP 4

Enter the **Control** tab in order to confirm that the object class is “Overhead”.

- Click on the WBS overview



Create Project: Project Definition

Settlement rule

Project Def. R-006NH9999 OE research emitters

Basic data Control Administration LongText

Project Profile NHA_project R&D (BA 8890) ☐ Transfer to proj.def

Accounting

Budget Profile ZZ0004

Planning profile ZZ0004

Interest Profile

Investment profile

Results Analysis Key

Simulation profile

PartnerDetermProced.

Planning dates

Network profile

WBS sched. prof ERP: forwards, ...

Sched. scenario Bottom-up scen...

Plan.meth/basic Bottom-up (tak...

Plan.meth/fcst Bottom-up (tak...

Network asst 0

Default Values for New WBS Elements

Object Class Overhead ☐ Statistical

Tax Jurisdiction

WBS status profile ☒ Integrated planning

Project stock

☒ No project stock

☐ Non-valuated stock

☐ Valuated stock ☐ Automatic reqmnts grouping

STEP 5

- Fulfill the level 1of the WBS by inserting the WBS element and Description as per the received template.

Create Project: WBS Element Overview

Summarization

Proj. def. R-006NH9999 OE research emitters

Basic data Dates Assignments Responsibilities Control Total

S. L...	WBS element	Description	Short ID	Typ	PI	Su	PE
1	R-006NH9999	OE research emitters		R1			
1				R1			
1				R1			

STEP 6

- Flag the "Acct" Column.
- Column "Typ" is set by default to R1. Change it only if it's mentioned in the template file.

Create Project: WBS Element Overview

Summarization

Proj. def. R-006NH9999 OE research emitters

Basic data Dates Assignments Responsibilities Control Total

S. L...	WBS element	Typ	PI	Su	PE	Acct	DE	System status	User status
1	R-006NH9999	R1				☒			
1		R1				☐			
1		R1				☐			

STEP 7

- Go to **Details** menu and enter in **WBS element customer fields**.

Details Extras System Help

WBS detail screen Ctrl+F9

Settlement rule F7

WBS element customer fields

STEP 8

Fill in the following fields, as per template:

- Proj. type
- GBU
- Sub-GBU
- Product
- Proj. Leader
- Proj. Manager
- Tax Cred. Local

Create Project: WBS Element

Navigation icons: Back, Forward, Home, Search, Print, Help, Settlement rule, Summarization

Proj.type: MGT

Project ID:

GBU: U03

Sub-GBU: VI-A11

Product: VI-S

Proj. Leader: 12001206

Proj. Manager: 12001206

TaxCred.FR elig.:

Tax Cred.Local: x

Note that the selection of the correct Project Type is very important when creating the WBS element, as it will have impact in some reports, namely CosTa and Capex ones.

In order to be considered Capex (both for CosTa and Capex Dashboard) the Project Type must be the one below:

WBS element type	Description
IM	CAPEX (Invest.)

STEP 9

Click on **Settlement rule**, in order to define the settlement rule of the WBS.

Create Project: WBS Element

Navigation icons: Back, Forward, Home, Search, Print, Help, Settlement rule

STEP 10

Click twice on the first line.

Maintain Settlement Rule: Overview

Navigation icons: Back, Forward, Home, Search, Print, Help, Plan settlement

WBS element: R-U06NH9999

OE research emitters

Actual settlement

Distribution rules	Settlement Receiver	Receiver Short Text	%	Equivalence no.	Amount	A. Se...	No. S...	Pro...	From...	To R...	First Used	Last Used
1												

STEP 11

Fill in the following fields:

- **Cost Center** – (received in the template)
- **Number** – Usually 1, this field should be adapt according to the number of receivers
- **Settlement type** – PER
- **Percent** – Usually 100% it's variable according to the number of receivers
- **Valid from** – month and year of the creation of the WBS

Maintain Settlement Rule: Distribution Rules

Navigation icons: Back, Forward, Home, Search, Print, Help

Settlement Sender

WBS element: R-U06NH9999

OE research emitters

Company Code: 0001

Actual settlement

Settlement Receiver

Cost Center: SMD889

Distribution Rule

Number: 1

Settlement type: per

Percent: 100 %

Equivalence no.:

Amount in EUR:

Valid from: 9 2012 to

Amt rule type:

Strategy:

Settle Each Period:

In the end go back by pressing  until you arrive to the *WBS first screen*.

STEP 12

Important fields of the master data that will have an impact for CosTa Dashboards. NOTE: The "responsible CC" is not mandatory for **Projects or WBS levels WITHOUT a flag** in the operative indicator of "Account Assignment Element".

RESPONSIBLE COST CENTER VS. SETTLEMENT COST CENTER:

The field "Responsible Cost Center" might not be filled with the Cost Center that should receive the costs - this is the "settlement Cost Center".

Instead, the "Responsible Cost Center" is linked to the person responsible to validate the respective costs.

DO WE NEED A RESPONSIBLE COST CENTER IN WBS FOR CAPITAL PROJECTS?

Yes. Even if the costs will be capitalized we need to determine the GBU, the plant, etc. This information will be provided by the responsible Cost Centers, as referred above.

STEP 13

In order to release the WBS, you have to go to **Edit > Status > Release**.

Check if the status is now **REL** and **SETC**.

 **Display Project: WBS Element Overview**

   Summarization

Proj. def. ☐ OE research emitters

Basic data Dates Assignments Responsibilities Control Total

S...	WBS element	Typ	Pl	Su	PE	Acct	Bill	System status	User Status
1	R-U06NH9999	RL			☐	☐	☒	REL SETC	

STEP 14

The WBS is now ready to be saved 