

# 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 1 of 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		R.1		<input type="checkbox"/>	<input type="checkbox"/>
1					R.1		<input type="checkbox"/>	<input type="checkbox"/>
1					R.1		<input type="checkbox"/>	<input type="checkbox"/>

**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	BIL	System status	User status
1		R-006NH9999	R1		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
1			R1		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
1			R1		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

**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

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.


**STEP 10**

Click twice on the first line.

**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

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. R-1063BB9999 OE research emitters

Basic data Dates Assignments Responsibilities Control Total

S. L...	WBS element	Typ	PI	Su	PE	Acct. Bil	System status	User Status
1	R-U06NH9999	RL		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	REL SETC	

**STEP 14**

The WBS is now ready to be saved 