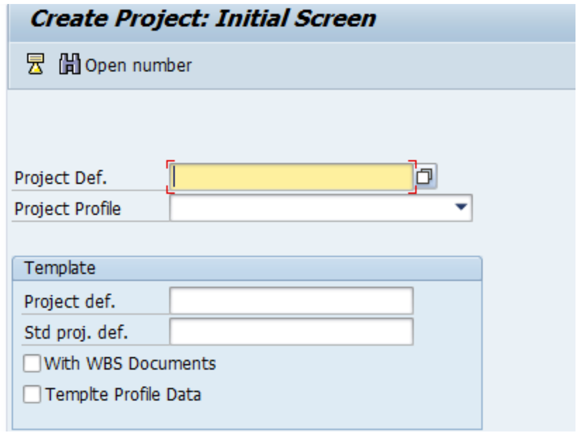
CJ01 - Create Project

STEP 1

Enter Transaction **CJ01**

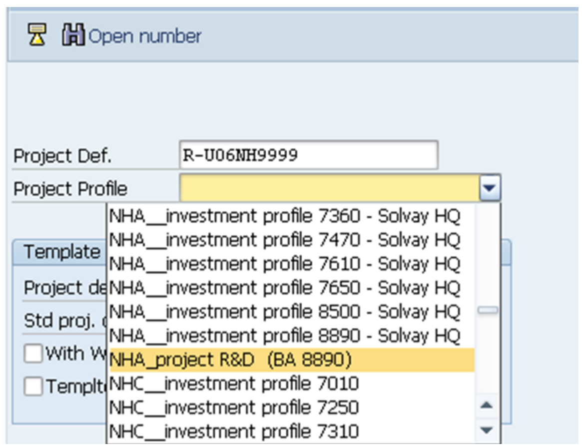


STEP 2

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

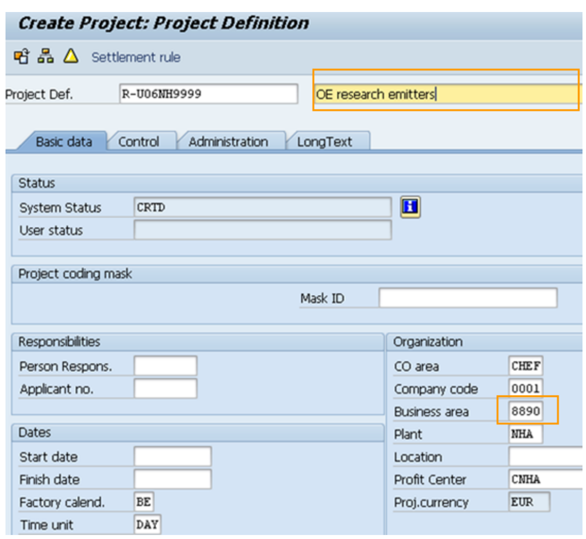
The **Project Profile** should be always **" XXX_project R&D (BA XXXX)"**.

Enter ↵



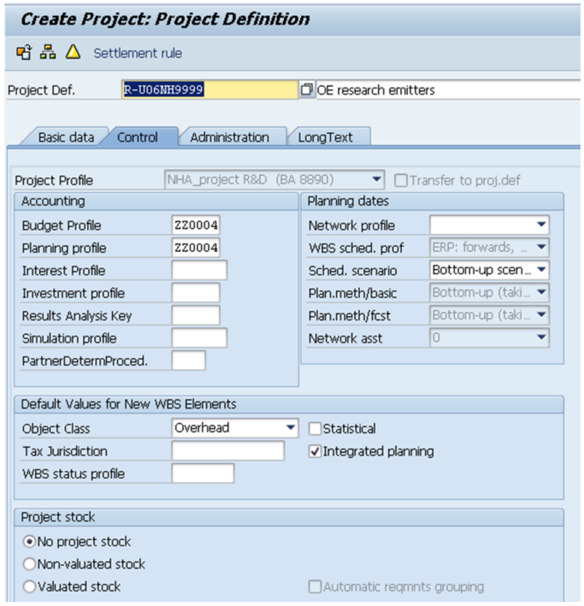
STEP 3

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



STEP 4

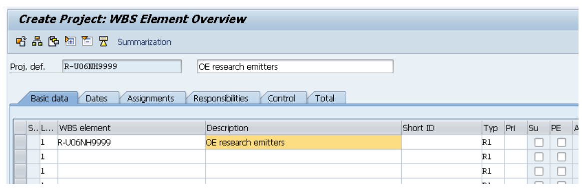
Enter the **Control** tab in order to confirm that the object class is *“Overhead”*.



- Click on the WBS overview 

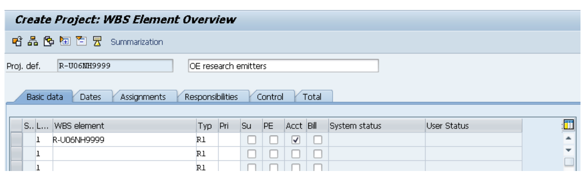
STEP 5

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



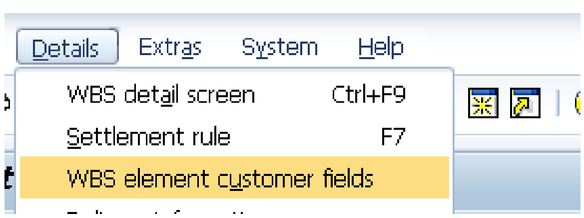
STEP 6

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



STEP 7

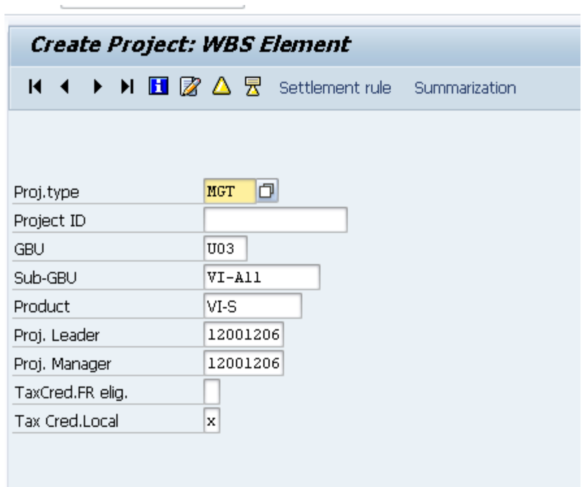
- Go to **Details menu** and enter in **WBS element customer fields.**



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:

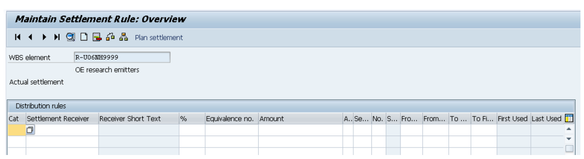
WBS element type	Description
IM	CAPEX (Invest.)

STEP 9

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

STEP 10

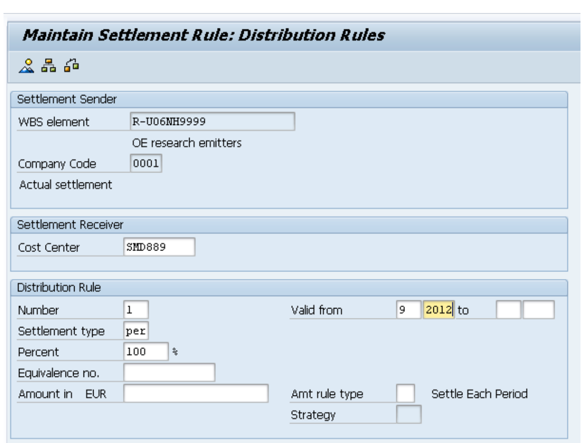
Click twice on the first line.



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.

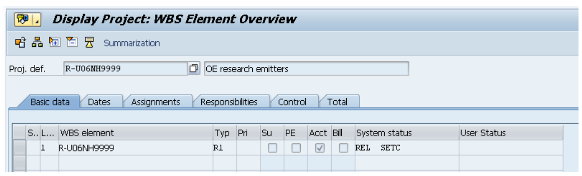
DO WE NEED A RESPONSIBLE COST CENTER IN WBS FOR CAPITAL PROJECTS?

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**.



STEP 14

The WBS is now ready to be saved