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## Overview

This Job Aid explains the usage of the standard transaction code or T-code CJ20N to create a project by copying a template into the Project Builder. The project template is called Standard WBS (Workbreakdown Structure).

In the Umoja Solution, transaction CJ20N is the only transaction code used to create projects from Standard WBS. Projects in Umoja consist of two types of Master Data;

1. Project Definition
2. Workbreakdown Structure Element (WBSE)

The Project Definition contains general data of the project and key information that is applicable for the entire project structure. It determines the profile of a project as well as its basic parameters. For example: project name, project start and end dates

Work Breakdown Structures (often referred to as Project Structures) show the project activities to be carried in a hierarchical, tree-like structure. It forms the basis for the organization and coordination of the activities that constitute the project. The various activities or work packages in the project are represented by individual WBS Elements (WBSEs) which are created in accordance with the desired itemization of specific tasks within a project.

A WBSE can also provide the framework for detailed cost estimating and suitable guidance for project-specific schedule development. Essentially, it allows you to monitor project components, costs and milestones at a more granular and defined level

Each WBSE has a unique identifier (ID) and can belong to one Project Structure only. Its assignment cannot be transferred to another Project Definition, as WBSE's through their IDs are linked to one specific Project Definition only.

\* \* \* \* \*

### 1. What can the t-code do?

The T-code is assigned to the designated users with the following Umoja Enterprise Roles:

- Project Management User
- Project Management Approver

These users can access the Project Builder (t-code CJ20N) to


- Create/ maintain or flag a Project Definition for deletion
- Create/ maintain or flag a WBS element for deletion
- Assign or reverse user status settings for WBS elements
- Assign or reverse system status settings for the entire project
- Maintain UN Assignments

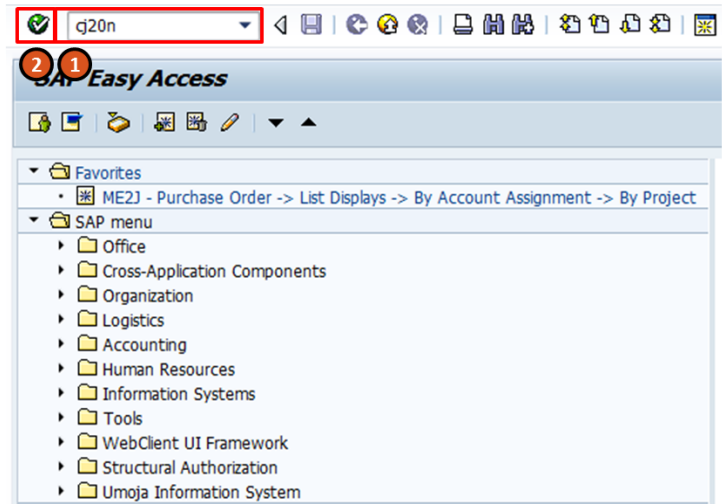
- Create projects by copying from existing projects or templates

This Job Aid will focus on the creation of projects by copying Standard WBS into the Project Builder. For all other functions, please see related Job Aids on the creation and maintenance of Project Structures or Project Templates.

## 2. How is the t-code used?

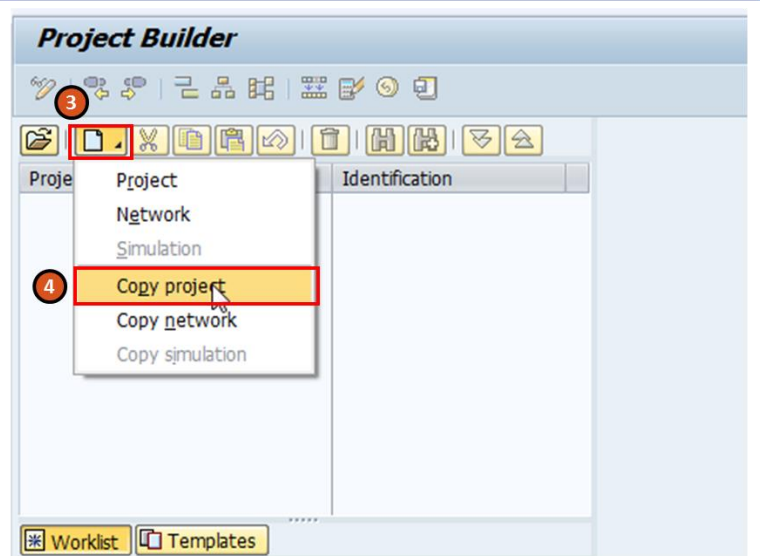
The steps to access the **Create Project** screen are as follows:

- 1 Enter **CJ20N** in the **Command** field
- 2 Click the **Enter**  icon. The **Project Builder** is displayed



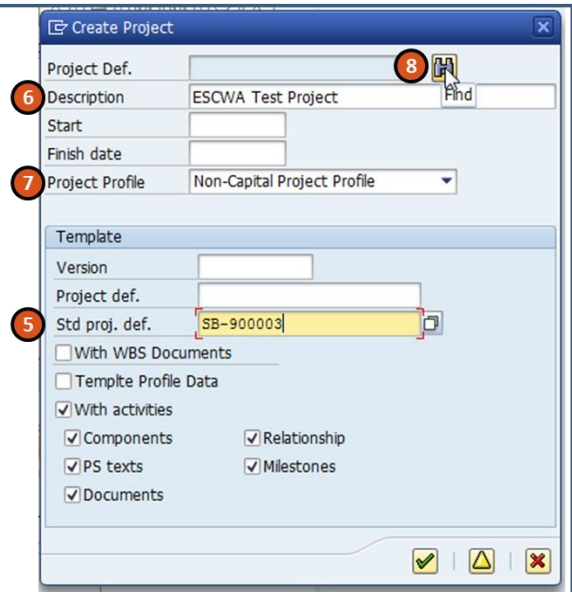
Next, select the function that will allow you to copy a Standard Project Structure into the Project Builder. The steps are as follows:

- 3 Click the **Create** menu button
- 4 Select **Copy project** option



The steps to create a Project based on an already defined Standard WBS are as follows:

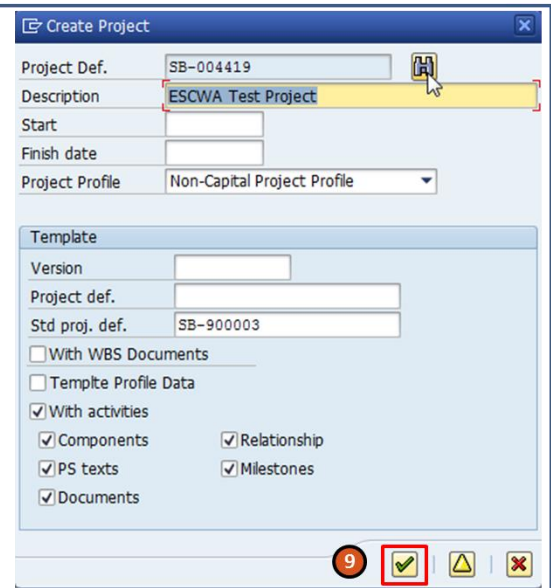
- 5 Select the Standard WBS ID; you can use the F4 help option to identify the right one
- 6 Enter a description for the Project Structure to be created
- 7 Define the Project Profile for the Project Structure to be created. Please note that this is a one time entry that cannot be reversed later on.
- 8 After these entries are made, select the Find option so the Project Builder can determine the next available Project Definition ID.



**Note**

With the selection of a **Capital Project Profile**, all project expenditures can but do not have to be capitalized. The Capital Project Profile gives the **option** of settling costs to Assets under Construction but also allows for cost settlements to the Resp. Cost Center or any other WBS element if needed. **Please note that for Peacekeeping Missions and SPMs, a different AuC process has been defined; therefore the Capital Project Profile should not be selected.**

- 9 Once the next available Project Definition ID has been identified, select  to continue.
- 10 Afterwards, an error message will be prompted to complete all the required entries which you confirm by selecting



On the **Check Required Fields** screen, provide the below information to complete the required entries at the Project Definition level:

- 11 Person Responsible No.
- 12 Applicant No.
- 13 Start Date
- 14 Business Area
- 15 Functional Area

Please check all defaulted values as well to verify if they apply to the Project Structure you want to create.

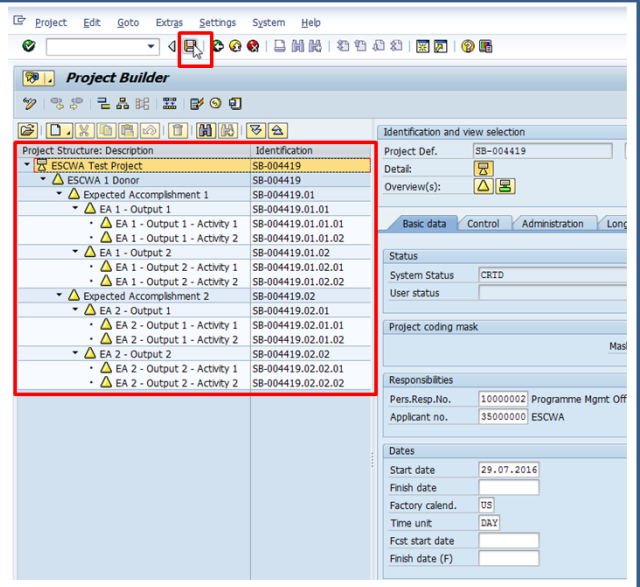
- 16 When completed, select

A message appears to inform that the Standard WBS has not been released which means, the created Project Structure will be in system status CRTD (Created).

- 17 Select  to confirm

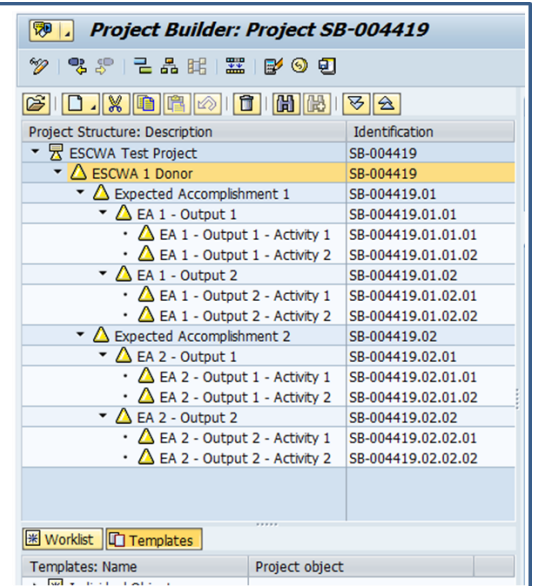
18 With the confirmation, the Standard WBS is copied into the Project Builder. Please review the Project Structure window to view if the entire Project Structure has been copied across.

19 Then select save to ensure the WBS is created first before making any modifications. You will receive confirmation on the bottom left side of your screen  Project SB-004419 is being created



While the Project Structure is still in system status "CRTD" (Created):

- Update the Project Definition and WBSE descriptions
- Add/ remove WBS elements if needed
- Validate the Resp. Cost Center value and update if needed
- Validate the Functional Area value on the WBSE Assignment data tab and update if needed
- If needed select Grant and Sponsored Program values on UN Assignment data tab
- Save all changes

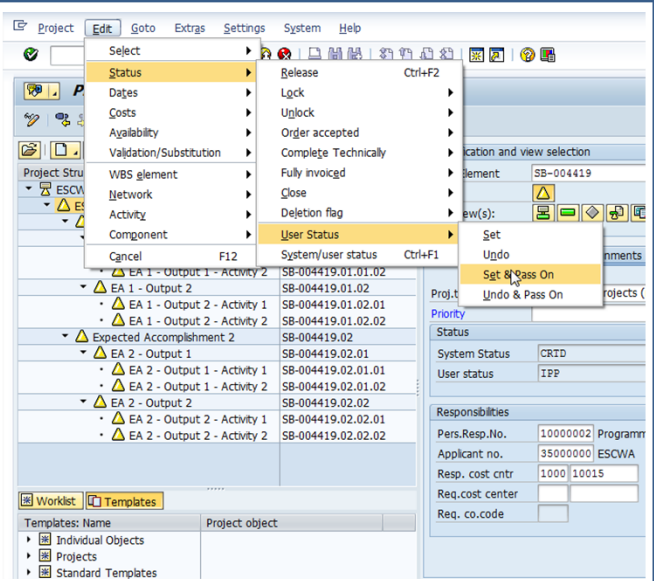


**Note**

As soon as any WBS element is in **system status 'REL'** (Released), the **Grant, Sponsored Program and Budget Control WBSE** fields will turn into display fields which means they **can no longer be maintained by the Project Management User or the Project Management Approver**. After system status 'REL' was assigned, the **Grant, Sponsored Program and Budget Control WBSE** fields can only be maintained by users with FM/ GM Enterprise Roles who have access to overwrite.

Once the copied Project Structure has been modified to meet the project requirements and the funding information on the UN Assignment data tab has been provided, proceed by making the relevant status changes;

- Update user status on the WBS elements from IPP → UBR, then from UBR → RFR
- Change the system status of the Project Definition to Release
- Save all status updates



### 3. General Recommendations for the Creation of Project Structures

When designing project templates or creating projects in the system, please bear the following recommendations in mind;

- Utilize the Workbreakdown Structure to achieve the desired granularity for your management reporting on project expenditures. The underlying assumption is that Project Structure are used to break-down expenditures by activities/ work packages to have a more granular view on financial postings. Should you not plan on using the break-down function and be looking for a flat cost collector instead, please use Internal Orders.
- Only allow financial postings to the lowest level WBS elements in your Project Structure as this is the level of granularity where you want to record information. Higher level WBSE are supposed to serve as summary nodes to which costs roll up for your reporting. To ensure that only the lowest level of WBSE are posted to, you can uncheck the 'Acct Assignment' option for all superior WBS elements.
- If a project is fully or partly grant-funded, only maintain the Grant/ Sponsored Program / Geography of the Beneficiary/ Thematic Assignment information on those WBS elements that you are posting so they can be derived in every transaction; i.e. the lowest level WBSE in your Project Structure. If you tried to consume grant budget by posting to a WBS element that has no Grant/ Sponsored Program / Geography of the Beneficiary/ Thematic Assignment on it, the transaction will fail.
- Posting to the lowest level WBS elements means that you need to reference the correct WBS element for every transaction against the project. For example, if a Purchase Requisition is raised for a project that affects multiple activities, the Purchase Requisition must be split across all relevant WBS elements that represent those activities. Otherwise, the information cannot be recorded at the desired level.
- If project expenditures are fully or partly capitalized, only define Investment Profiles for those WBS elements that are posted to.

- The general recommendation is to stick with the default level 1 Budget Control WBSE. Your budget is already controlled by so many dimensions (e.g. Fund Center, Functional Area, Commitment Item Class and potentially even Grant, Sponsored Program and Sponsored Class). Therefore having multiple instances of availability control (= multiple Budget Control WBS element) within one Project Structure may be completely superfluous.
- Should you define multiple Budget Control WBSE within one Project Structure, we recommend that all Budget Control WBSE are at the same level to support your budget reporting.

### Revision History (Soft Copy only)

Date	Version	Prepared by	Description
02 August 2016	1	Laura Justus	Initial Draft