Table of Contents

Overview

Umoja users can define cost plans for each Project Structure by entering plan values for each WBS element. Please note that the creation of a project cost plan should only be done for tracking and reporting purpose as it remains within the Controlling module; the cost plan is standalone and will not feed into any budget formulation or a budgeting process.

The cost plan is entered manually for each WBS element, in lump sum amounts, and does not refer to specific cost elements such as equipment, contractual services or staff costs. A separate cost plan can be entered for each year in which a specific WBS element is active.

The cost plan is a different concept from the release budget. A cost plan entered on a WBS element does not allow for any spending.

Objective

This job aid explains how users assigned to Enterprise Roles "Project Management User" and "Project Management Approver" can create yearly project costs plans for WBS elements under their purview.

Enterprise Role & T-Codes

This Job Aid refers to the following T-Code, roles and tables

Role	T-Code	Tables
PROJECT_MANAGEMENT_APPROVER	CJ40	BPEJ/ BPEG
PROJECT_MANAGEMENT_USER	CJ40	BPEJ/ BPEG
FACILITIES_APPROVER	CJ40	BPEJ/ BPEG
FACILITIES_PLANNER	CJ40	BPEJ/ BPEG
LEASE_CONTRACT_APPROVER	CJ40	BPEJ/ BPEG
LEASE_PROCESSOR	CJ40	BPEJ/ BPEG

Job Aid
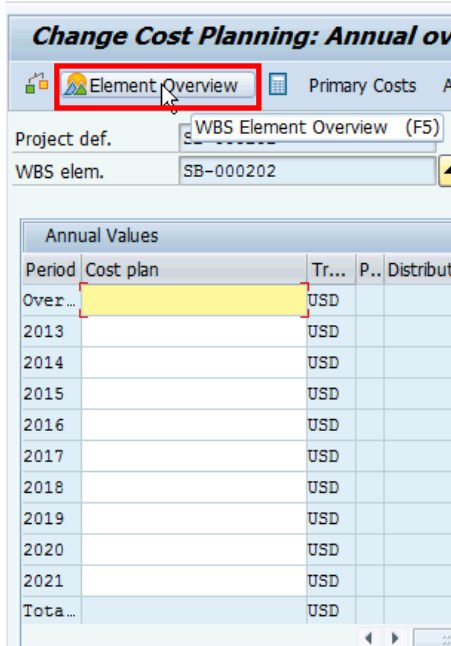
Steps to create a project cost plan

1. Enter T-Code **CJ40** in the Command field. Select execute.
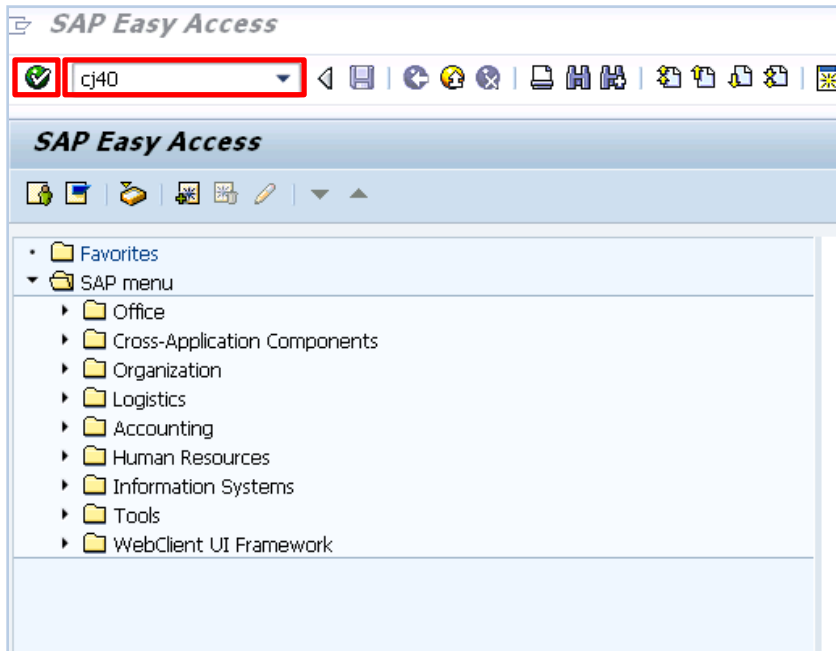
2. Enter the Project Definition ID of the project you want to plan for. Then, select the Cost Planning option.
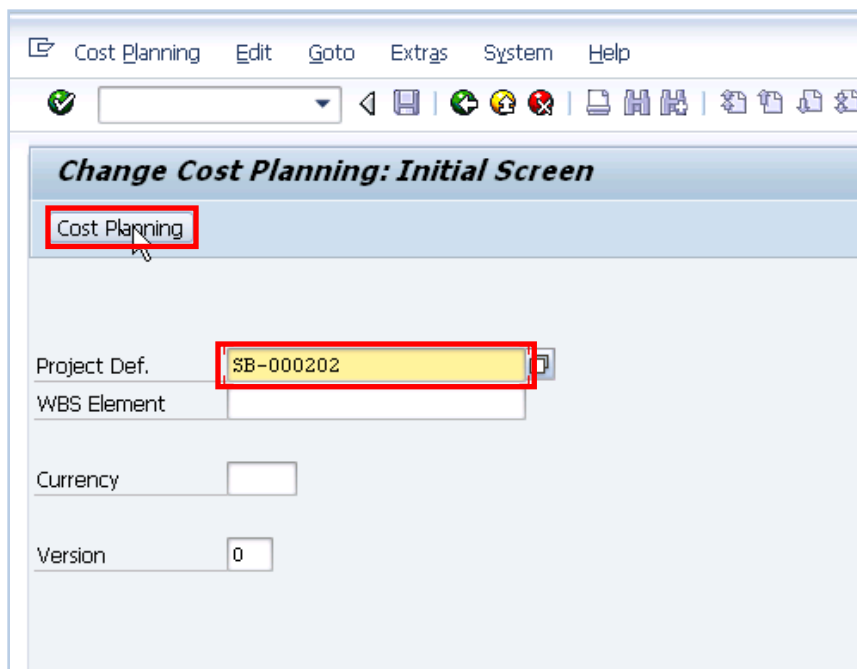
3. On the Change Cost Planning: Annual overview screen, select "Element Overview" to see all WBS element.

4. Using the drop down labelled "Period", select each calendar year for which you want to plan, and enter the relevant annual cost plan values at the lowest WBS element level. Validate the data by selecting 'enter' before moving to another calendar year.

Please note that is only required to enter amounts for the lowest level WBS elements, as the planned values will roll up automatically upon saving.
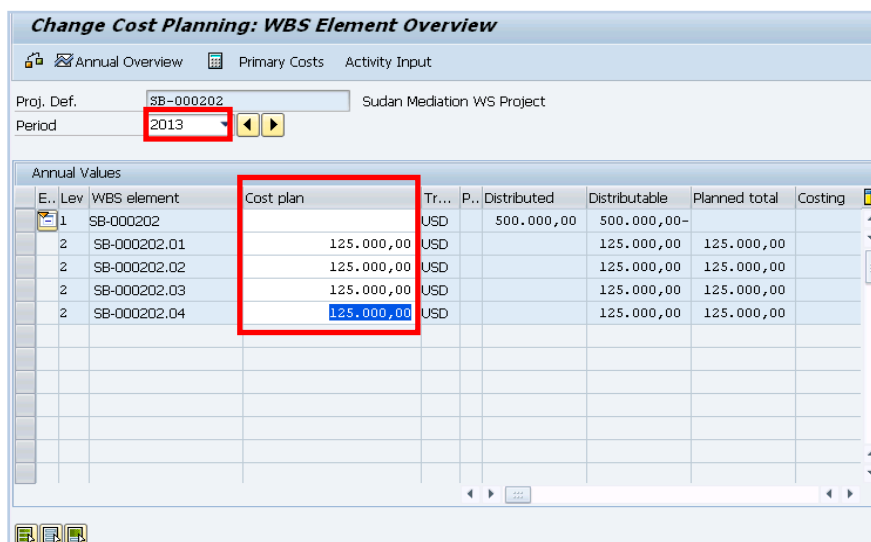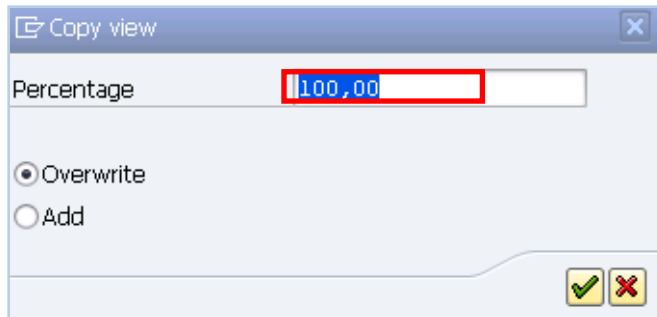
5. After you have entered the plan for each calendar year, you should calculate the overall project cost plan values. Thus, select the Period "overall" from the drop down.

6. Then, go to Edit > Select > Select all
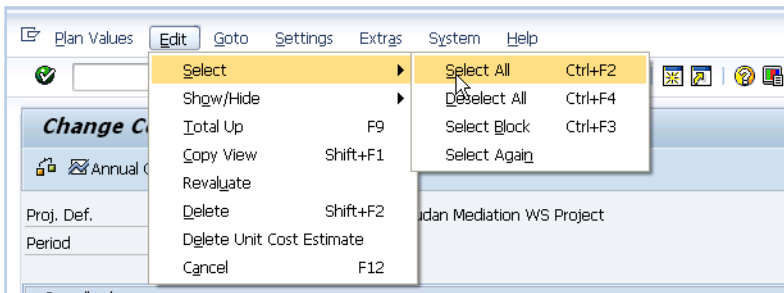
7. Afterwards, select Edit > Copy View. Select 03-Cumulative
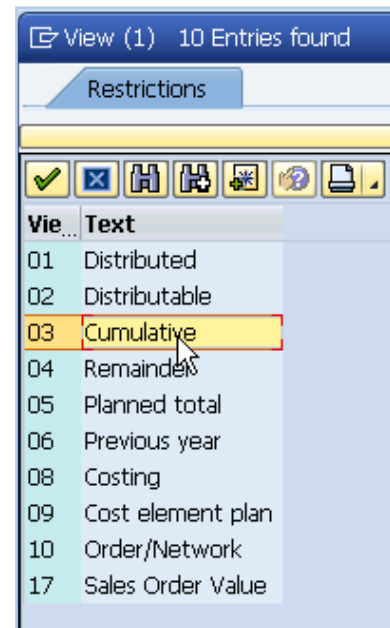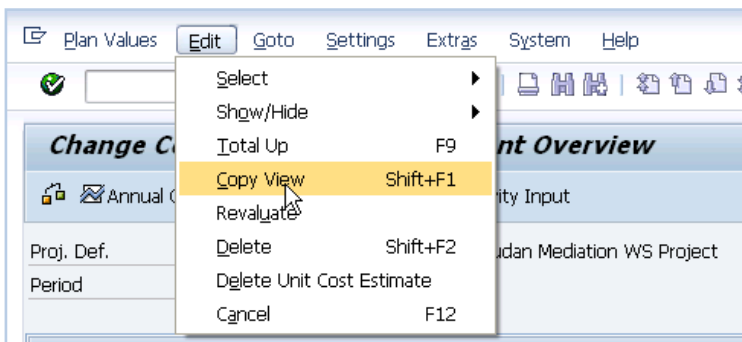
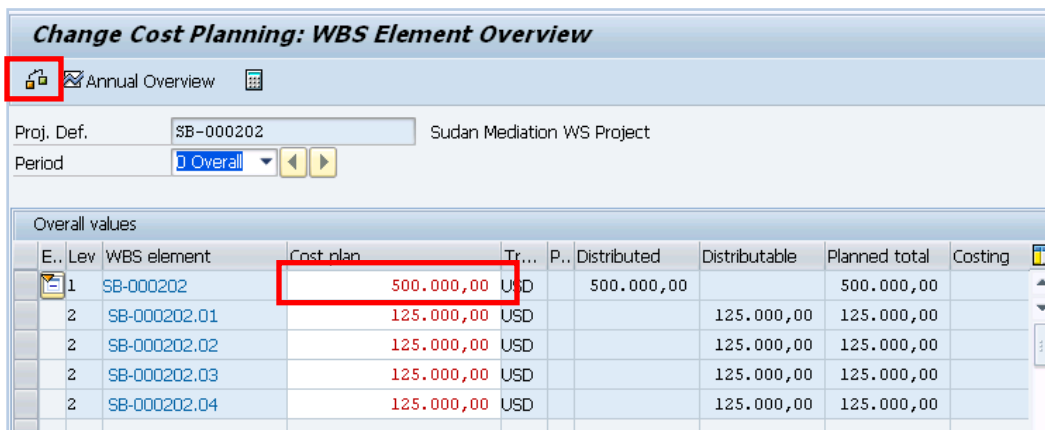8. Select 100,00 Percentage and the Overwrite option.

9. Click the "Check" icon to confirm the data was entered properly. This will also update the upper level nodes.

10. Click the "Save" ⊟ icon. The successful status of the save should be indicated in the status bar.
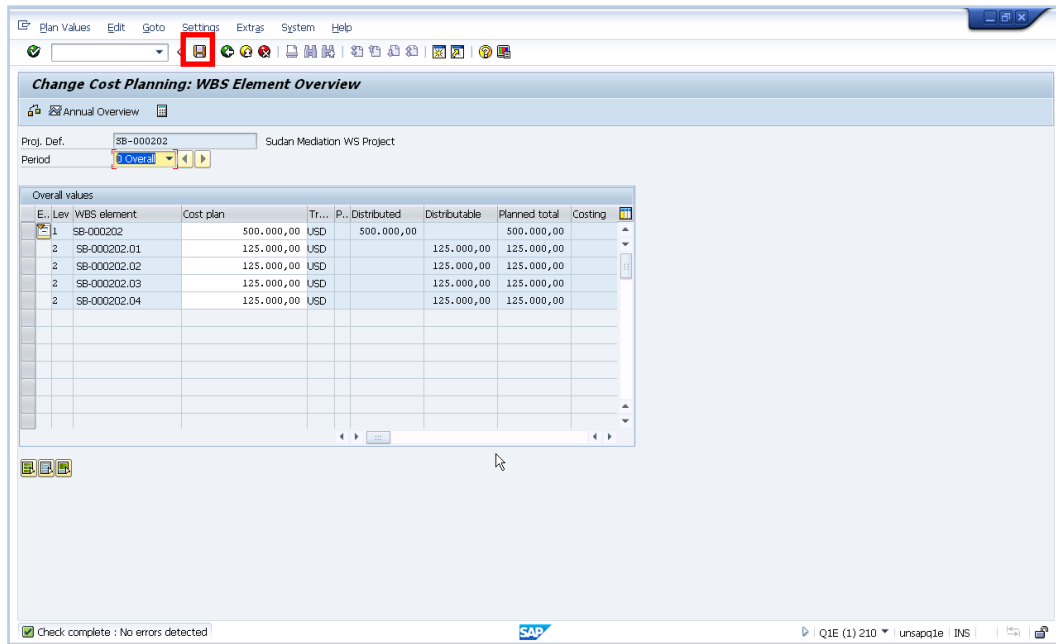
Revision History (Soft Copy only)

Date	Version	Prepared by	Description
15/03/2016	1	Luc Debrun	Initial Draft