

Project System
SAP Implementation at IESCO
Training Document
Status Management
CE PMU – PD GSC

Contents

Status Management	3
1 Purpose	3
1.1 Process Steps (PMU / GSC)	4
1.1.1 Created Status (CRTD)	4
1.1.2 User Status (PRBB / ARAB)	5
1.1.3 Released Status (REL)	7
1.1.4 Activity Confirmations (Before Project Closing)	17
1.1.5 Technically Completed Status (TECO)	19
1.1.6 Cancellation of TECO Status	22
1.1.7 Closed Status (CLSD)	24
1.1.8 Cancellation of CLSD Status.....	29

Status Management

1 Purpose

Document

Status Management is used to control the state of Projects.

Prerequisites

Before changing the status, user should be confirmed about project status.

1.1 Process Steps (PMU / GSC)

1.1.1 Created Status (CRTD)

Use

This is the initial system status for new WBS elements; the system sets status CRTD automatically, when you create a new WBS element. This status allows you to plan costs, revenues and budgeting. Purchasing process can also be started from this status like generating purchase requisitions, purchase orders/service entry

Procedure

1. Access "Project Builder" App, From Fiori Launchpad, and Open Respective Project.

The screenshot shows the SAP Project Builder interface for Project PG.1713. The top bar includes the SAP logo and the title 'Project Builder: Project PG.1713'. Below the title is a menu bar with buttons: Menu, Save, Back, Exit, Cancel, System, Display <-> change, Project planning board, Hierarchy graphic, Mass change, and E. The main area is divided into two sections. The left section, 'Project Structure: Description', shows a tree view with '8th STG (Year 2017-2018) E PG.1713' selected. The right section, 'Project def.', shows 'PG. 1713' and '8th STG (Year 2017-2018) Estimate'. Below this is a 'Detail' section with icons for Overview(s) and a 'Status' section. The 'Status' section has two fields: 'System Status' and 'User status'. The 'System Status' field is highlighted with a red box and contains the value 'CRTD'. The 'User status' field contains the value 'PRBB'.

Project Structure: Description	Identification
8th STG (Year 2017-2018) E PG.1713	PG.1713
8th STG (Year 2017-2018) PG.1713	PG.1713

Project def. PG. 1713 8th STG (Year 2017-2018) Estimate

Detail:

Overview(s):

Basic Data Control Administration Long Text Collect. PR Indicators

Status

System Status CRTD

User status PRBB

Result:

CRTD status generated automatically.

1.1.2 User Status (PRBB / ARAB)

Use

PRBB User Status is set as default in project definition, it will prevent project / sub project status set to release, once Budget is allocated and Budget is released, This status will be set to ARAB so that project / sub-project status will be set to REL, so that Execution of Work can be initiated.

Procedure

1. Click on System Status / User Status Button

Project Builder: Project PG.1713

Project def: PG. 1713 8th STG (Year 2017-2018) Estimate
 Detail: 
 Overview(s):  

Status	
System Status	CRTD 
User status	PRBB

2. Choose ARAB Status (Allow Release After Budget)

Menu ▾ System ▾ Status management information

Proj.def. PG. 1713 8th STG (Year 2017-2018) Estimate

Respons. 100 CE PMU (IESCO)

Status Business processes

Syst. Status

X	Status	Text
☒	CRTD	Created

Status with Status Number

X	St...	Text	No.
☒	PRBB	Prevent Release Before Budget	1
☐	ARAB	Allow Release After Budget	2

3. Press Back , now you can view the user status to ARAB from PRBB (Now user will be able to release the project / sub projects)

Basic Data Control Administration Long Text Collect. PR Indicators

Status

System Status	CRTD	i
User status	ARAB	

Result:

User Status has been changed to ARAB, it will allow project system status to Release now.

1.1.3 Released Status (REL)

Use

REL-Released status allows you to post and transfer actual cost to project WBS Element. This status is necessary to receive materials. Activity confirmation, external activity receiving and service acceptance sheet can be done by releasing network activity only which automatically set system status of WBS element as PREL-Partially released. Planned cost from Personnel Cost planning (PCP) can only be transferred to WBS element whose system status is set to REL-Released. WBS element having REL-Released status cannot be changed back into CRTD-Created

Procedure

1. Open "Change WBS Element Status" App and Search for WBS Element.

WBS Elements

Search

Project PG.1713

New Grid - Wah
PG.1713-1718.1.002
Level 4
Project PG.1713

Engineering & Design - New Grid - Wah
PG.1713-1718.1.002.1
Level 5
Project PG.1713

Material - New Grid - Wah
PG.1713-1718.1.002.2

Change WBS Element Status

New Grid - Wah

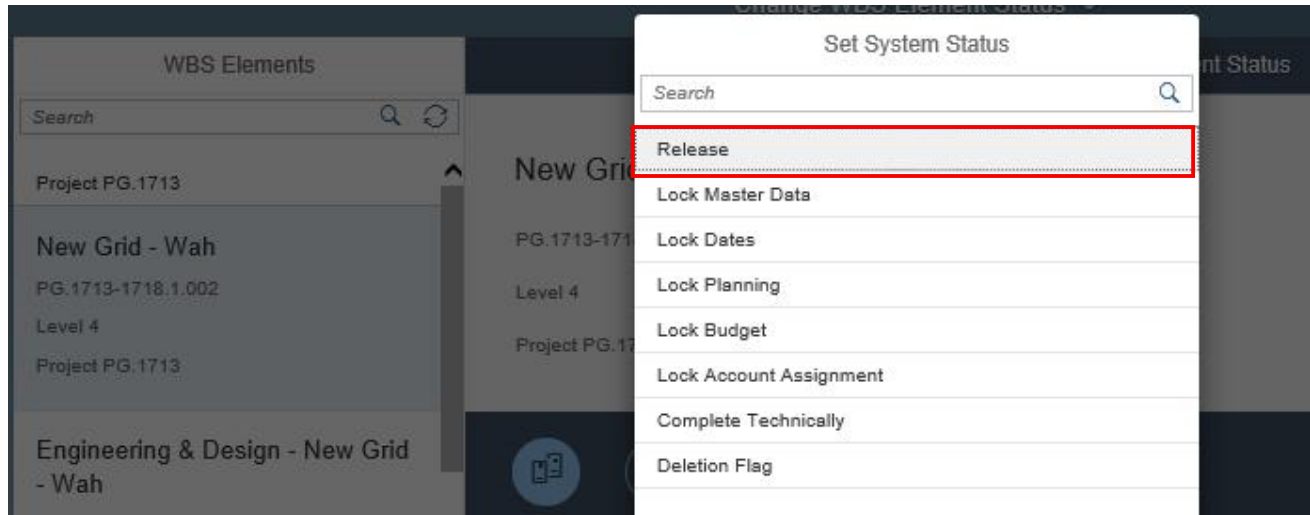
PG.1713-1718.1.002
Level 4
Project PG.1713

System Status: Created

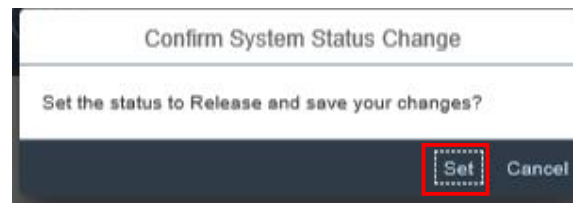
Availability control active

Set System Status

2. Click on Set System Status, and choose Release option



3. Press Set Option



4. System Status has been set to release of WBS and all WBS under it.

WBS Elements

Search

Project PG.1713

New Grid - Wah

PG.1713-1718.1.002

Level 4

Project PG.1713

Engineering & Design - New Grid - Wah

PG.1713-1718.1.002.1

Level 5

Project PG.1713

Material - New Grid - Wah

PG.1713-1718.1.002.2

Level 5

Project PG.1713

Contract Work - New Grid - Wah

PG.1713-1718.1.002.3

Level 5

Project PG.1713

Change WBS Element Status

New Grid - Wah

PG.1713-1718.1.002

Level 4

Project PG.1713

System Status: Release

Availability control active

Asset in construction exists

Set System Status

System status successfully changed

5. Open Change Network Activity Status App, select the activity

Network Activities

Search

210000000303/0020
Project PG.1713

Material Lot 2
210000000304/0020
Project PG.1713

Foundation
210000000303/0030
Project PG.1713

Sketch & Design
210000000306/0010
Project PG.1713

Change Network Activity Status

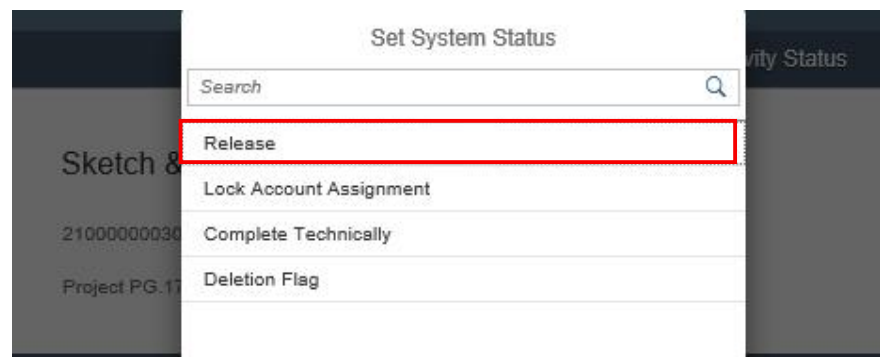
Sketch & Design

210000000306/0010
Project PG.1713

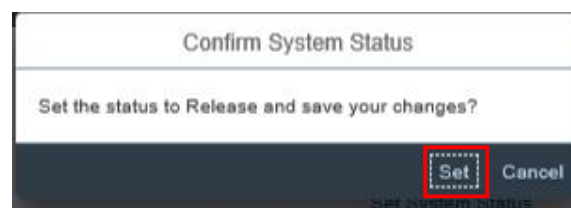
System Status: Created
Settlement rule created

[Set System Status](#)

6. Press Set System Status and choose Release



7. Press Set button



8. System status of network activity has been set to Release

Network Activities

🔍
🔄

Purchase of Land

210000000303/0020

Project PG.1713

Material Lot 2

210000000304/0020

Project PG.1713

Foundation

210000000303/0030

Project PG.1713

Sketch & Design

210000000306/0010

Project PG.1713

Purchase of Land

210000000306/0020

Project PG.1713

Foundation

210000000306/0030

Project PG.1713

Change Network Activity Status

Sketch & Design

210000000306/0010

Project PG.1713

📄
👤

System Status Released

Settlement rule created

[Set System Status](#)

System status set successfully.

9. View Network activity Detail by opening "Network Activity Overview" App and enter project definition and press GO

 Network Activity Overview 

Standard *  Hide Filters

Project Definition:  WBS Element:  Level:  Network:  Activity:  Adapt Filters (1) 

Network Activities (9) | Standard  Confirm Network Activity Change Status Show Details  

☐	Network	Network Name	Activity/Element Name	Acti...	Ele...	Latest Start Date	Latest Fini
☐	210000000303	Engineering & Design - New Grid - F11	Sketch & Design	0010		07.06.2018	27.0
☐	210000000303	Engineering & Design - New Grid - F11	Purchase of Land	0020		25.04.2018	27.0
☐	210000000303	Engineering & Design - New Grid - F11	Foundation	0030		19.04.2018	01.0
☐	210000000304	Material - New Grid - F11	Material Lot 1	0010		18.04.2018	27.0
☐	210000000304	Material - New Grid - F11	Material Lot 2	0020		07.06.2018	27.0
☐	210000000305	Contract Work - New Grid - F11	Carriage and Erection	0010		27.06.2018	27.0
☐	210000000306	Engineering & Design - New Grid - Wah	Sketch & Design	0010		01.06.2018	22.0
☐	210000000306	Engineering & Design - New Grid - Wah	Purchase of Land	0020		19.04.2018	22.0
☐	210000000306	Engineering & Design - New Grid - Wah	Foundation	0030		11.05.2018	22.0

10. Choose Activity and press show detail button.

Network Activity ▾

Purchase of Land 210000000306 / 0020

General Information
Status
Network
Milestones
Material Components
Purchasing Document
WBS Element/Project

Status	Description	User Status
CRTD	Created	No
SETC	Settlement rule created	No

Network

Network:
210000000306

Network Name:
Engineering & Design - New Grid - Wah

Network Type Name:
PMU/GSC NW activity assignment(int.NA)

11. Open "Project Definition Overview" App, Enter project definition and press show detail.

Project Definition Overview

Standard

Hide Filters

Project Definition:

8th STG (Year 2017-2018) Es...

Adapt Filters (1)

Projects (1) Standard

Show Details

12. You can view the status of Project Definition which is set to PREL (Partial Release) this is due to REL status to sub project.

Project Definition ▾

8th STG (Year 2017-2018) Estimate PG.1713

General Information
Status
WBS Elements First Hierarchy Level
Networks

Status	Description
ARAB	Allow Release After Budget
CRTD	Created
PREL	Partially released

WBS Elements First Hierarchy Level

WBS Element	WBS Element Name	Company Code Name
PG17130000 000	8th STG (Year 2017-2018) Estimate	IESCO

Result:

Statuses has been set to Release.

1.1.4 Activity Confirmations (Before Project Closing)

Use

Activity Confirmation is required before closing the project, confirmation of Internal Activities is mandatory before setting the status to CLOSE

Procedure

1. Open "Confirm Network Activity" App, search the activity,

Network Activities

Foundation

210000000303 / 0030

Project PG.1713

0.0
Hour

Confirm Network Activity

Project PG.1713

Work Overview

Planned Hours: 0 Actual Hours: 0 Forecast Hours: 0

Report Processing

Planned: 0.0 Hour

Actual: Hour

Remaining: Hour

Forecast: 0.0 Hour

Report Date

Actual Start:

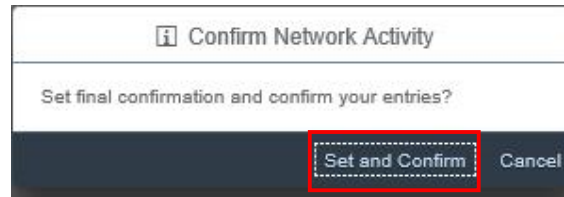
Actual Finish:

Forecast Finish:

Report Processing Percentage

Processing: %

2. Enter Actual dates and Percentage of completion and press confirm button.



A dialog box titled "Confirm Network Activity" with an information icon. Below the title is the text "Set final confirmation and confirm your entries?". At the bottom, there are two buttons: "Set and Confirm" (highlighted with a red dashed border) and "Cancel".

Result:

Activities has been confirmed.

Note:

- This activity will be carried out at the time of Handing / Taking Process.

1.1.5 Technically Completed Status (TECO)

Use

Technical Completion (TECO) status represents the physical or mechanical completion of a project or individual asset. Although work may be complete on the project, it is expected that late charges, e.g. final vendor invoices, are outstanding therefore the structure must be open for receiving financial postings. Status will pass on to the subordinate objects as well.

Procedure

1. Open "Change WBS Element Status" App and search WBS Element.

WBS Elements

PG.1713-1718.1.001

Project PG.1713

New Grid - F11
PG.1713-1718.1.001
Level 4
Project PG.1713

Engineering & Design - New Grid - F11
PG.1713-1718.1.001.1
Level 5
Project PG.1713

Material - New Grid - F11
PG.1713-1718.1.001.2
Level 5
Project PG.1713

Change WBS Element Status

New Grid - F11

PG.1713-1718.1.001

Level 4

Project PG.1713

System Status: Release

Availability control active

Settlement rule created

Budgeted

Asset in construction exists

Set System Status

2. Choose Set System Status and select Complete Technically
3. Confirm the Set option

Set System Status

Search

Q

Lock Master Data

Lock Dates

Lock Planning

Lock Budget

Lock Account Assignment

Complete Technically

Close

Deletion Flag

Confirm System Status Change

Set the status to Complete Technically and save your changes?

Set

Cancel

4. WBS System status is set to TECO

WBS Elements

PG.1713-1718.1.001

Project PG.1713

New Grid - F11

PG.1713-1718.1.001

Level 4

Project PG.1713

Engineering & Design - New Grid - F11

PG.1713-1718.1.001.1

Level 5

Project PG.1713

Material - New Grid - F11

PG.1713-1718.1.001.2

Level 5

Project PG.1713

Change WBS Element Status

New Grid - F11

PG.1713-1718.1.001

Level 4

Project PG.1713

System Status: Complete Technically

Availability control active

Settlement rule created

Budgeted

Asset in construction exists

Set System Status

Result:

Status has been set to Technically Completed.

Note:

- This process will be carried out once handing taking has been completed.

1.1.6 Cancellation of TECO Status

Use

TECO status can be reversed for WBS Elements which may be required to plan dates and cost again by changing existing network activities or assigning new activities.

Procedure

1. To Rest the status to REL, Press Clear button.

WBS Elements

PG.1713-1718.1.001

Project PG.1713

New Grid - F11

PG.1713-1718.1.001

Level 4

Project PG.1713

Engineering & Design - New Grid - F11

PG.1713-1718.1.001.1

Level 5

Project PG.1713

Material - New Grid - F11

PG.1713-1718.1.001.2

Level 5

Project PG.1713

Change WBS Element Status

New Grid - F11

PG.1713-1718.1.001

Level 4

Project PG.1713

System Status: Complete Technically

Availability control active

Settlement rule created

Budgeted

Asset in construction exists

Set System Status

Clear

2. Press Clear option form confirm system status change.

Confirm System Status Change

Clear the status Complete Technically and save your changes?

Clear

Cancel

3. WBS System Status has been reset to Release

New Grid - F11 PG.1713-1718.1.001 Level 4 Project PG.1713	PG.1713-1718.1.001 Level 4 Project PG.1713
Engineering & Design - New Grid - F11 PG.1713-1718.1.001.1 Level 5 Project PG.1713	System Status: Release Availability control active Settlement rule created Budgeted Asset in construction exists
Material - New Grid - F11 PG.1713-1718.1.001.2	

Result:

Status has been reset to Release form Technically Completed.

1.1.7 Closed Status (CLSD)

Use

CLSD-Closed status is set for a work breakdown structure or WBS element that has been completed from both logistic and an accounting point of view. It means you can no longer assign networks activities, confirm activities and receive materials/external services. You use this status for a work breakdown structure that has been completed from both a logistic and an accounting point of view.

Procedure

1. Open Change WBS Element Status App, and search WBS Element

WBS Elements

PG.1713-1718.1.001

Project PG.1713

New Grid - F11

PG.1713-1718.1.001

Level 4

Project PG.1713

Engineering & Design - New Grid - F11

PG.1713-1718.1.001.1

Level 5

Project PG.1713

Material - New Grid - F11

PG.1713-1718.1.001.2

Level 5

Project PG.1713

Change WBS Element Status

New Grid - F11

PG.1713-1718.1.001

Level 4

Project PG.1713

System Status: Complete Technically

Availability control active

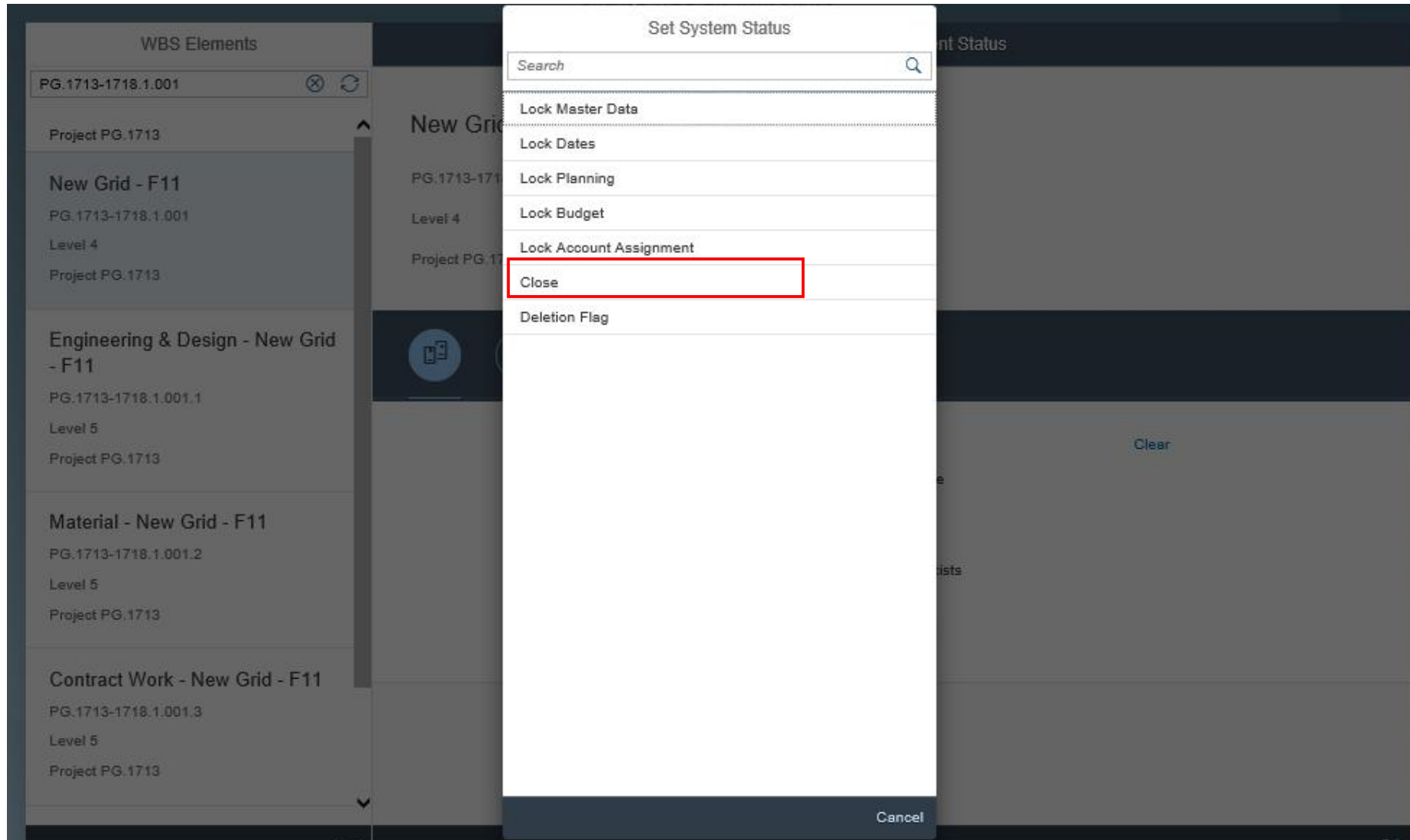
Settlement rule created

Budgeted

Asset in construction exists

Set System Status

2. Press Set system status and choose CLOSE



3. Press Set Option

Confirm System Status Change

Set the status to Close and save your changes?

Set

Cancel

4. WBS Status has been set to CLOSE.

New Grid - F11

PG.1713-1718.1.001

Level 4

Project PG.1713

Engineering & Design - New Grid - F11

PG.1713-1718.1.001.1

Level 5

Project PG.1713

Material - New Grid - F11

PG.1713-1718.1.001.2

Level 5

Project PG.1713

PG.1713-1718.1.001

Level 4

Project PG.1713

System Status

Close

Clear

Availability control active

Settlement rule created

Budgeted

Asset in construction exists

5. Open Change Network Activity Status, search for relevant activity for changing status.

Network Activities

Project PG.1713

Carriage and Erection
210000000305/0010
Project PG.1713

Material Lot 1
210000000304/0010
Project PG.1713

Sketch & Design
210000000303/0010
Project PG.1713

Purchase of Land
210000000303/0020
Project PG.1713

Change Network Activity Status

Material Lot 1
210000000304/0010
Project PG.1713

System Status: Technically completed

Clear

Confirmed

Settlement rule created

Open reservations posted

Manually confirmed

Set System Status

6. Press Set system status and choose Close option

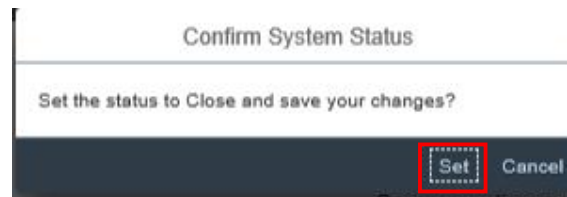
Set System Status

Lock Account Assignment

Close

Deletion Flag

7. Press SET option from confirm system status popup.



8. System status of network activity has been set to closed



Result:

Status has been set to Close.

Note:

- This process will be carried out once A-90 has been performed along with all invoices has been posted.

1.1.8 Cancellation of CLSD Status

Use

CLSD status can be reversed for WBS Elements which may be required to post vendor or client invoice and service acceptance.

Procedure

1. To Undo Close status, Press Clear Option

WBS Elements	Change WBS Element Status
PG.1713-1718.1.001	
Project PG.1713	
New Grid - F11	New Grid - F11
PG.1713-1718.1.001	PG.1713-1718.1.001
Level 4	Level 4
Project PG.1713	Project PG.1713
Engineering & Design - New Grid - F11	
PG.1713-1718.1.001.1	
Level 5	
Project PG.1713	
Material - New Grid - F11	
PG.1713-1718.1.001.2	
Level 5	
Project PG.1713	

System Status: Close

Availability control active

Settlement rule created

Budgeted

Asset in construction exists

[Set System Status](#)

[Clear](#)

2. Perss Clear option from confirm system status change window

Confirm System Status Change

Clear the status Close and save your changes?

Clear
Cancel

3. WBS System status has been reset to TECO.

New Grid - F11 PG.1713-1718.1.001 Level 4 Project PG.1713	PG.1713-1718.1.001 Level 4 Project PG.1713
Engineering & Design - New Grid - F11 PG.1713-1718.1.001.1 Level 5 Project PG.1713	System Status: Complete Technically Clear Availability control active Settlement rule created Budgeted Asset in construction exists
Material - New Grid - F11 PG.1713-1718.1.001.2 Level 5	

Note:

- For resetting system status of "Network activity", simply press Clear option and confirm your action.

Result:

Status has been reset to Technically Completed from Close.