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Icons

Icon	Meaning
	Caution
	Example
	Note
	Recommendation
	Syntax
	External Process
	Business Process Alternative/Decision Choice

Typographic Conventions

Type Style	Description
<i>Example text</i>	Words or characters that appear on the screen. These include field names, screen titles, pushbuttons as well as menu names, paths and options. Cross-references to other documentation.
Example text	Emphasized words or phrases in body text, titles of graphics and tables.
EXAMPLE TEXT	Names of elements in the system. These include report names, program names, transaction codes, table names, and individual of a programming language, when surrounded by body text, for example, SELECT and INCLUDE.
Example text	Screen output. This includes file and directory names and their paths, messages, source code, names of variables and parameters as well as names of installation, upgrade and database tools.
EXAMPLE TEXT	Keys on the keyboard, for example, function keys (such as F2) or the ENTER key.
Example text	Exact user entry. These are words or characters that you enter in the system exactly as they appear in the documentation.
<Example text>	Variable user entry. Pointed brackets indicate that you replace these words and characters with appropriate entries.

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PS Generic Settings (SP)

1 Purpose

This configuration guide provides the information you need to set up the configuration of this building block manually.

If you do not want to configure manually and prefer an automated installation process using the SAP Best Practices Installation Assistant and other tools, refer to the *SAP Best Practices Quick Guide*.

2 Preparation

2.1 Prerequisites

Before you start installing this building block, you must install prerequisite building blocks. For more information, see the Building Block Prerequisite Matrix (Prerequisites_Matrix_[xx]_[yy]_[zz].xls; the placeholder [xx] depends on the SAP Best Practices version you use, for example, BL refers to the SAP Best Practices Baseline Package, [yy] depends on the language version, for example, EN for English language, and [zz] depends on the country version, for example, RU for Russia: *Prerequisites_Matrix_BL_EN_RU.xls*). This document can be found on the SAP Best Practices documentation DVD in the folder `..\[xx]_[zz]\Documentation\`; ([xx] depends on the SAP Best Practices version and [zz] depends on the country version).

3 Configuration

3.1 Defining Basic Settings for Projects WBS-Structure

3.1.1 Defining Project Coding Mask

Use

In this step, you create masks for editing the project number.

Procedure

1. Access the activity using one of the following navigation options:

Transaction code	OPSO
IMG menu	<i>Project System → Structures → Operative Structures → Work Breakdown Structure (WBS) → Project Coding Mask → Define Project Coding Mask</i>

2. On the *Change View "Project Number Editing": Overview* screen, choose *New Entries*.
3. On the *New Entries: Overview of Added Entries* screen, make the following entries:

PrjID	C
Coding mask	/XXXX-XXXX-XX
Description	Commercial Services Project

4. Choose *Save*.

3.1.2 Maintaining Project Types for WBS Elements

Use

You can use the project type as a filtering criterion in the information system. The project type does not influence the program control or the screen selection.

Procedure

1. Access the activity using one of the following navigation options:

Transaction code	OPSO
IMG menu	<i>Project System → Structures → Templates → Standard Work Breakdown Structure → Settings for Standard and Operative WBSs → Maintain Project Types for WBS Elements</i>

2. On the *Change View "Project Types": Overview* screen, choose *New Entries* and make the following entries:

Type	YB
Description	SP: Service Project (global)
Type	CO
Description	CO: Cost projects
Type	PM
Description	PM: Plant maintenance project
Type	SP
Description	SP: Service project
Type	IP
Description	IP: Investment Project
Type	CP
Description	CP: Customer Project

3. Choose *Save*.

3.1.3 Specifying Persons Responsible for WBS Elements

Use

In this step, you specify the responsible people.

Procedure

1. Access the activity using one of the following navigation options:

Transaction code	OPSO
IMG menu	<i>Project System → Structures → Operative Structures → Work Breakdown Structure (WBS) → Specify Persons Responsible for WBS Elements</i>

2. On the *Change View "Persons Responsible for Project/ Capital Investment Program": Overview* screen, choose *New Entries* and make the following entries:

Respons.	999101
Name of resp.person	Jens Dom
Respons.	999102
Name of resp.person	Jennifer Stein
Respons.	999103
Name of resp.person	Frank Reibel
Respons.	999201

Name of resp.person	Michael Korb
Respons.	999202
Name of resp.person	Sophie Schneider
Respons.	999203
Name of resp.person	Matthias Schanze
Respons.	999301
Name of resp.person	Barbara Langer
Respons.	999302
Name of resp.person	Paul Wagner
Respons.	999401
Name of resp.person	Klaus Berger

3. Choose Save.

3.1.4 Creating User-Defined Fields for WBS Elements

Use

The following user-defined fields are defined in the system:

- General text fields
 - You can use these fields to enter your own data, for example:
 - Information on people responsible
 - Information on substitutions or proxies
 - Internal phone numbers
- Quantity fields and their units
 - You can also define formula parameters for quantity fields. The formula parameters are used, for example, in work center formula calculation or network costing.
- Value fields and their units
- Date fields: You can use these fields, for example, to enter internal start data
- Checkboxes: Here you can enter information for analyses in the information system

The for the user-defined fields are determined by a key word ID.



The SAP system does not check the contents of user-defined fields. You can make your own enhancements (that is, customer-specific functions) to the user-defined fields. The enhancement CNEX0001 is available for you to do this in development class CN (application development PS project management).

Procedure

1. Access the activity using one of the following navigation options:

Transaction code	OPS1
IMG menu	<i>Project System → Structures → Operative Structures → Work Breakdown Structure (WBS) → User Interface Settings → Create User-Defined Fields for WBS Elements</i>

- On the *Change View "User fields": Overview* screen, choose *New Entries* and make the following entries:

Field key	YBSV001	
Description	SP: Setting WBS/network	
Text	Text 1	Text 2
Text	Text 3	Text 4
Quantity	Quantity 1	Quantity 2
Value	Value 3	Value 4
Date	Date 1	Date 2
Checkboxes	Indicator 1	Indicator 2
Authorization object	Not selected	

- Choose *Save*.

3.1.5 Specifying Graphics Profile for WBS Date Planning

Use

The profile defines parameters for the display and the colored indicators of WBS elements and activities in the hierarchy graphic.

Procedure

- Access the activity using one of the following navigation options:

Transaction code	SPRO
IMG menu	<i>Project System → Dates → Date Planning in WBS → Specify Graphics Profile for WBS Date Planning</i>

- On the *Change View "Settings for Hierarchy Graphic/Time Scheduling": Overview* screen, choose *New Entries* and make the following entries:

General Data	
Time schd. prof	YBSV
Description	SP: Service Project
Display	
Display option	1
Display option	1
Act./ WBS display	Activated
Indicators	
Color for act.s	BLACK
Color for order	BLUE
Color milestone	BROWN_1
Color for doc.s	DARKYELLOW
Color for elem.	GRAY
Color-Subnetwk.	DARKGRAY
Color for mat.	GREEN

- Choose *Save*.

3.1.6 Defining Database Selection Profiles

Use

All data in the information system comes from or is derived from the logical project system database (PSJ). You need the profile for this database for all analyses in the project system.

In the database profile, you determine:

- The project view according to which the selected data is displayed on the screen, sorted according to the profit center, for example.
- The maximum explosion level for the selection, that is, the maximum number of hierarchy levels displayed in reports. Make sure that you consider the wbs levels and the levels of the assigned network hierarchy below.

The level of detail depends on the project view and the selection criteria.

- The objects that are selected in the database.

Once you are within an analysis, you cannot select any more objects from the database.

You determine the scope of selection on the relevant initial screens.

Procedure

1. Access the activity using one of the following navigation options:

Transaction code	OPTX
IMG menu	<i>Project System → Information System → Selection → Define Database Selection Profiles</i>

2. On the *Change View "Project Info System: Database settings": Overview* screen, choose *New Entries* and make the following entries:

Database prof.	YBSV
Description	Standard selection (structure)
Last changed by	
Project view	000000000001
Maximum level	99
Protected	Inactive
Not changeable	Inactive
Commercial eval.	Inactive
Superior obj.s	Activated

Origin	
Archive data	Not selected
Version data	Not selected
Std structures	Not selected
Selection Criteria	
Project def.	Activated
Sales documents	Activated
Component	Activated
WBS element	

WBS element	Activated
Incl. Hierarchy	Activated
Dynamic sels	Activated
Network/order	
For WBS	Activated
Others	Activated
Incl.subnets	Inactive
Network	Activated
Maint. order	Activated
Prod. order	Activated
CO order	Activated
Activity	
For WBS	Activated
Others	Activated
Network act.	Activated
Act./Main.order	Inactive → Activated
Prodn ord.acts	Inactive → Activated

Miscellaneous	
Rel. view	Activated
Capacity	Activated
Confirmation	Activated
PRT	Activated
Milestone	Activated
PS text/docs	Activated
Purchasing data	Activated
Planned order	Activated
Expenses	Activated
Valuated qty	Inactive → Activated
Earned value	Inactive → Activated

3. Choose Save.

3.1.7 Creating/Changing Planning Profile

Use

The budget/planning profile groups all the control parameters for planning or budgeting together.

You can use the following parameters to control your planning and budgeting:

1. Time horizon - You define the following:
 - Period into the past for which you can plan/budget

- Period into the future for which you can plan/budget
 - Start year for planning/budgeting
2. Planning/budgeting for total/annual/period values
 3. Which value is displayed in addition to the plan/budget when accessing the function
 4. Decimal places and scaling factor as default values
 5. Detail planning (CO orders and projects)
 - Cost element group: primary costs and revenues
 - Planning parameters: costs and revenues
 - Sender cost center group
 - Sender activity type group
 - Statistical key figure group
 - Costing parameters
 6. Projects
 - Planning in all WBS elements or only in planning elements
 - Availability control: annual or overall budgets

Procedure

1. Access the activity using the following navigation options:

Transaction code	OPSB
IMG menu	<i>Project System → Costs → Planned Costs → Manual Cost Planning in WBS → Hierarchical Cost Planning → Create/Change Planning Profile</i>

2. On the *Change View "Planning Profile: Cost and Revenue Planning for Projects"*:
Overview screen, choose *New Entries* and make the following entries:

Field name	Description	User action and values	Comment
Profile		YBSV01	
Description		SP: Costs/Revenues: Years	
Bottom-up planning		Inactive	
Planning elements		Activated	
Past		1	
Future		3	
Total values		Not selected	
Annual values		Activated	
Decimal places		0	
Scaling factor		Not selected	
Controlling area currency		Activated	
Default Object Currency		Not Selected	
From quotation		Inactive	
From sales order		Activated	

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