CJ20N – Changing a User Status

Overview:

Projects and WBS Elements have two different types of statuses: System and User. A System Status in one that was delivered when SAP was implemented. A User Status that is customized to help control transaction that can be posted. The following is a list of User Statuses the City of Portland has asked to be made available and accompanying them is a description of how they work.

HOLD No Trans Allowed, WBS on Hold

This User Status will not allow any transaction to get posted to the WBS Element. It stops all financial postings, including settlements, so if there are any costs that have been posted prior to activating this status, when Month-End Settlements occur, you may be requested to remove the status, to enable settlements. A time this might be used is when a Project is moving from one phase to another and you need to keep it from being used inappropriately.

REL Released

This User Status will allow all transactions, much like the System Status REL. When combined with other statuses, the other status will over-rule this status, taking the more conservative action and stopping transactions.

NOLB No Labor

Though this status says “No Labor,” it only works on timecards where Activity Costing is used. The best way of know if you use Activity Costing, when you record time to various Cost Objects, you are required to use an Activity Type (i.e., LBRREG, BTSPRJ, etc.). Those Bureaus using Direct Costing cannot have the Cost Object stopped, as it causes all transactions to stop, including settlement.

NOPU No Purchasing Reqs or POs

This User Status stops both plan and distributed requisition (Req) and purchase order (PO). So if you have an existing Rep or PO, if this status is active, you will not be able to close them. You will need to have the status removed prior to closing and then once closed, have it reactivated.

NOGR No Goods Receipts

This User Status will stop all Goods Receipts. A time this status might be handy is when you are moving from one phase of a project and you have a contract that crosses these phases. Thus, implementing this status will keep any existing PO from posting any further costs to the WBS Element, encouraging the PO to get modified for the new phase.

NOIO No New Internal Orders

This User Status will stop the creation of New Internal Orders that settle to the related WBS Element. When this status is used, it will not stop any existing Internal Orders that have been created to settle to this cost object, it only prevents new ones from getting created.

NOHD No Overhead

This User Status will stop Costing Sheets from allocating Overhead Costs to the WBS Element. It will not stop the manual posting of Overhead Costs, as these are financial transactions, much like settlements.

Transaction:

SAP Menu > Accounting > Project System > Project > CJ20N – Project Builder

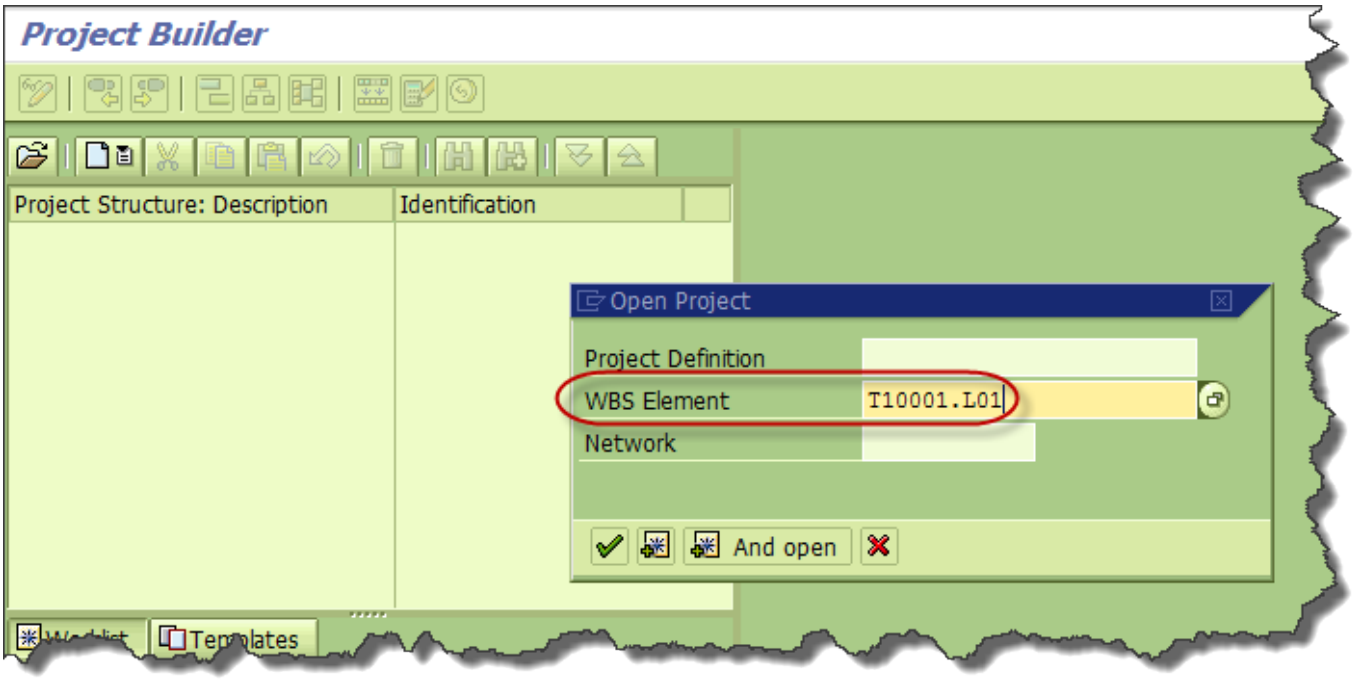
Hints / Tips:

If you are only modifying a User Status on one WBS Element, open the WBS Element directly, otherwise, open the Project and Modify all the WBS Elements at once (the mass process might be considered when moving from one phase of a project to another, involving many WBS Elements.

Procedure:

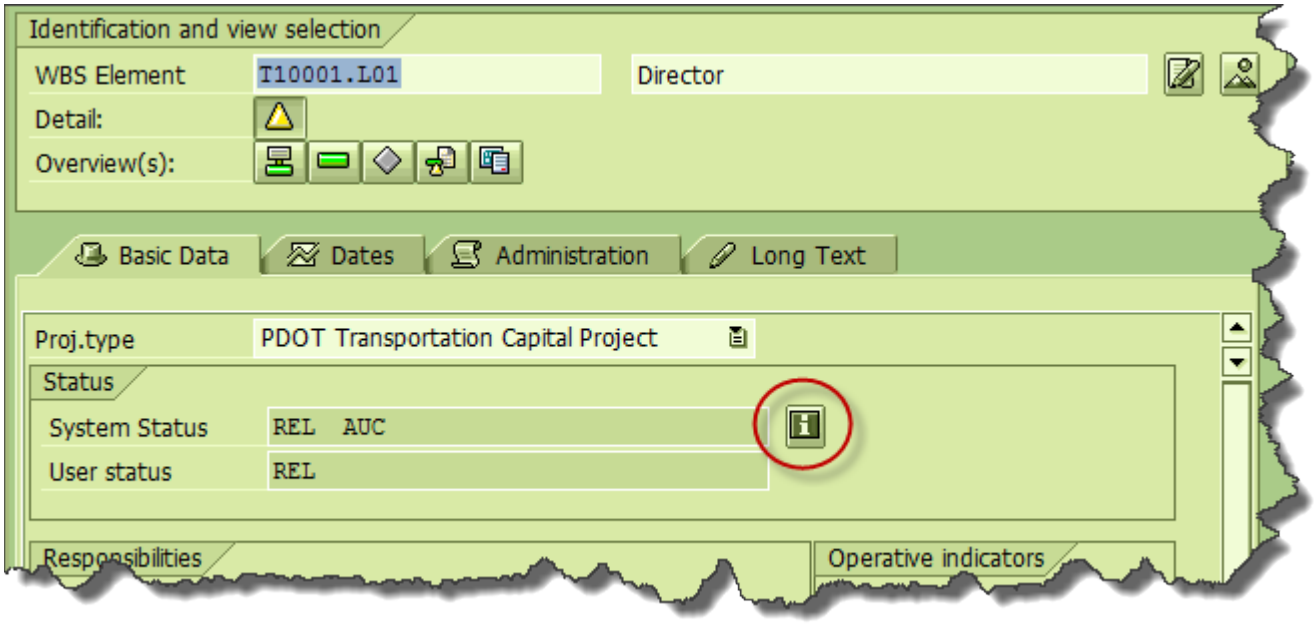
Perform the following steps in order to modify a single WBS Element.

Step 1: Open the WBS Element



[SCREENSHOT for Step 1]

Step 2: Select the *System/user status* Icon, found on the *Basic Data* tab



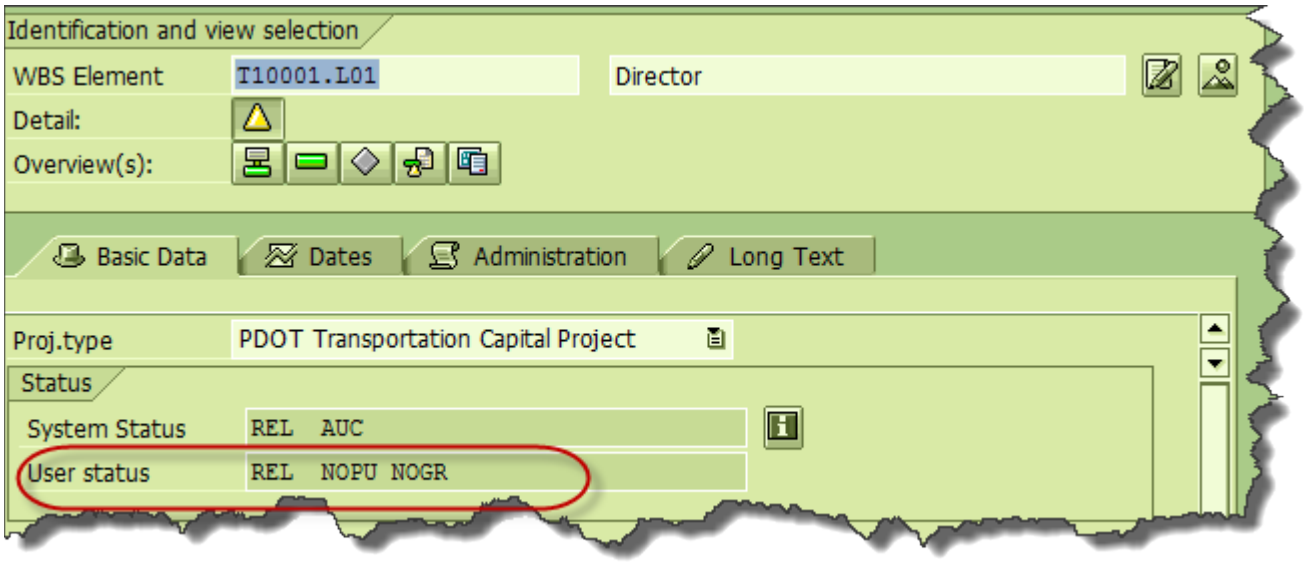
[SCREENSHOT for Step 2]

Step 3: Select the various User Statuses you which to activate

[SCREENSHOT for Step 3]

As there are more statuses that are not listed, use the *Previous Page* & *Next Page* Icons to find more choices.

Step 4: Select the *Back* Icon and note the change in the *User status* section



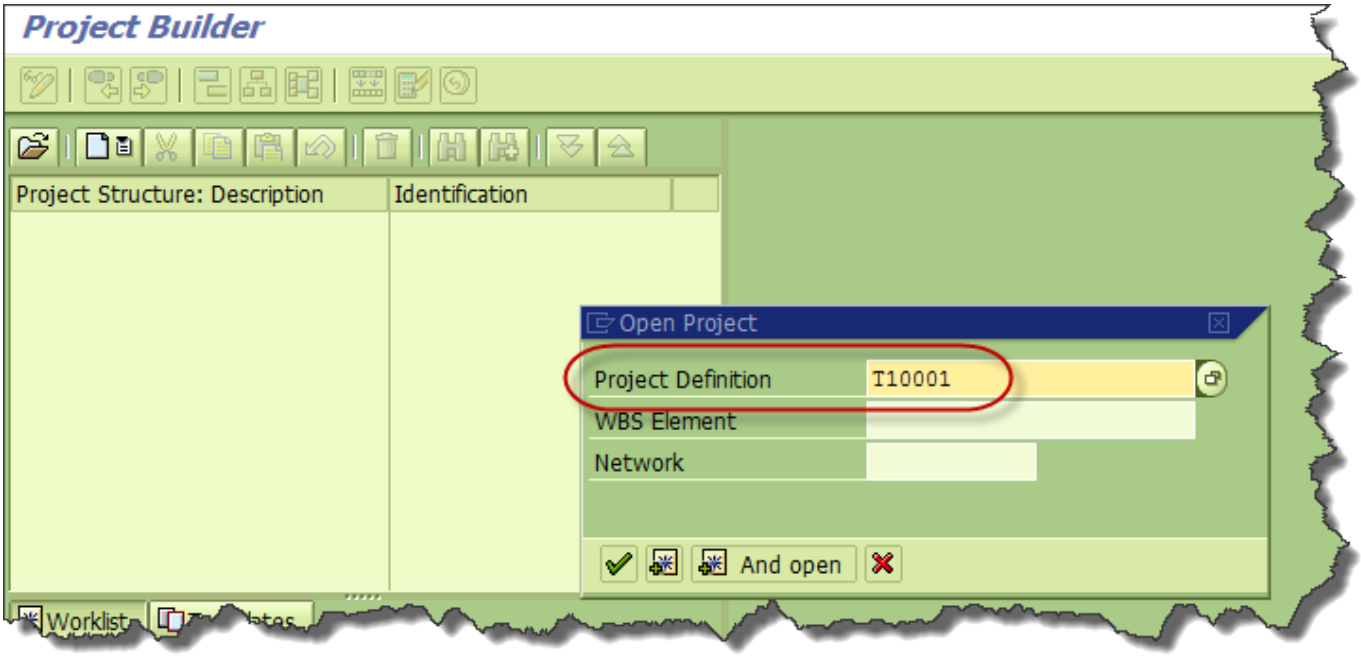
[SCREENSHOT for Step 4]

Step 5: Click the *Save* Icon to keep your work.

[SCREENSHOT for Step 5]

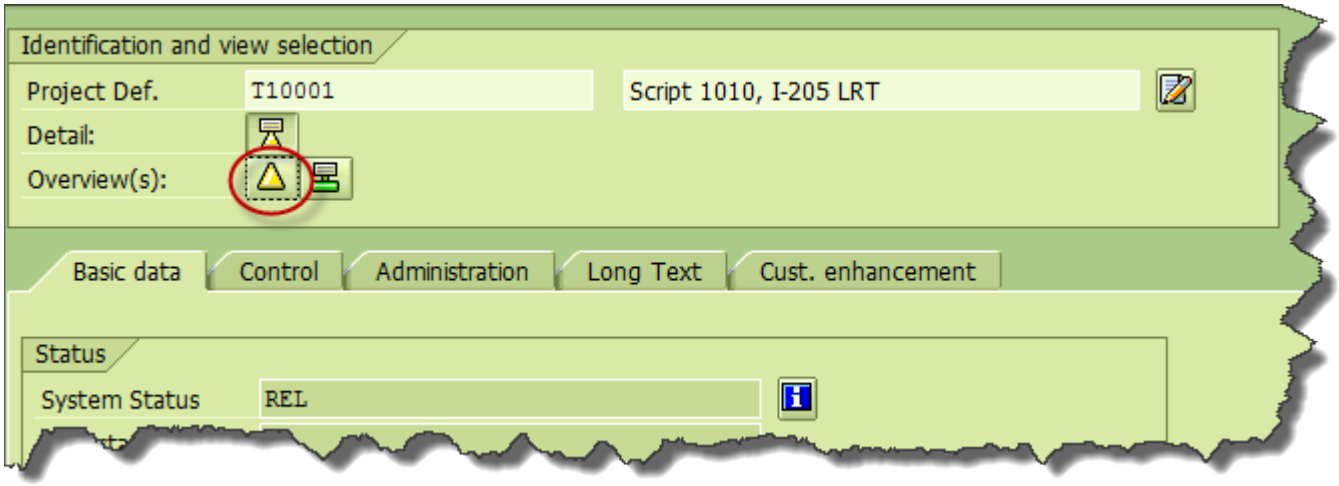
Perform the following steps in order to modify multiple WBS Elements.

Step 1: Open the Project



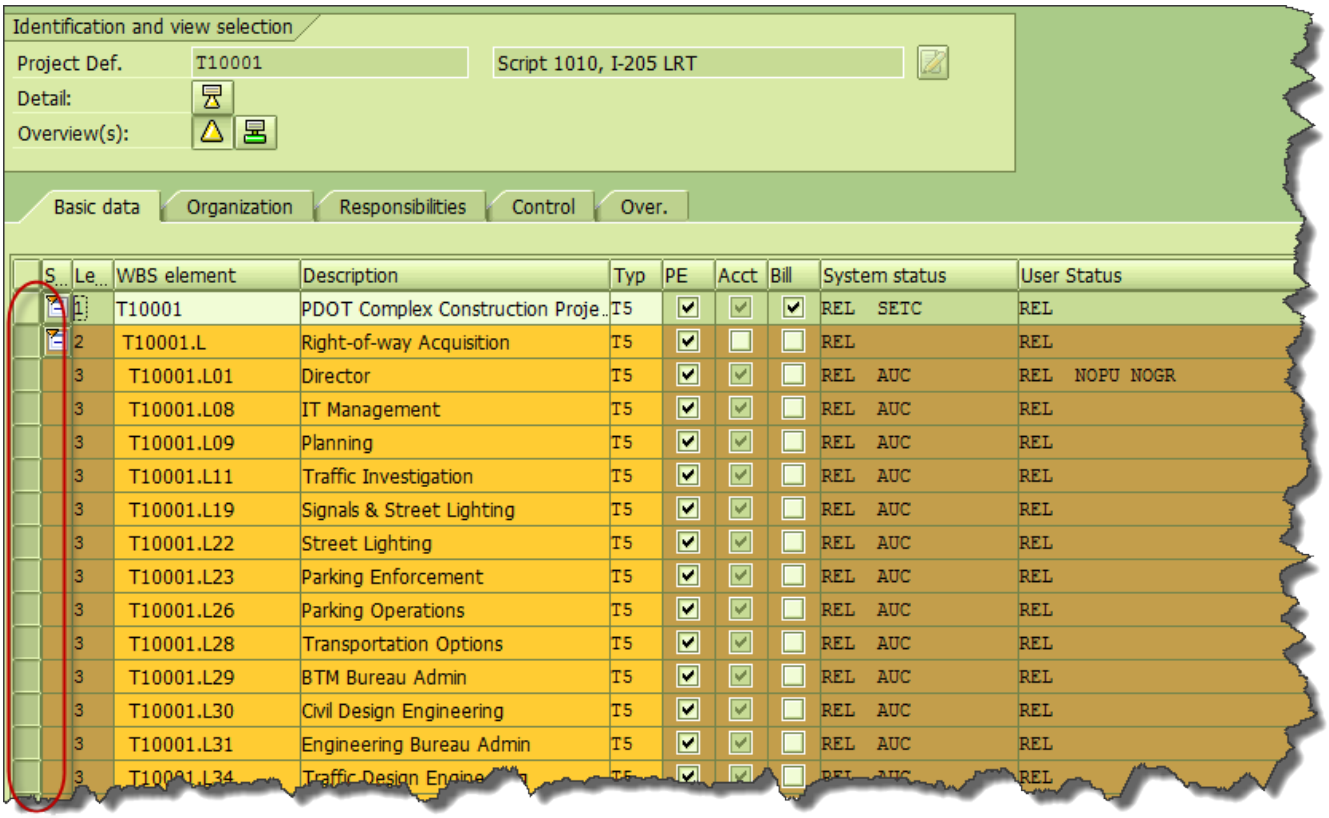
[SCREENSHOT for Step 1]

Step 2: Select the *WBS Element Overview* Icon



[SCREENSHOT for Step 2]

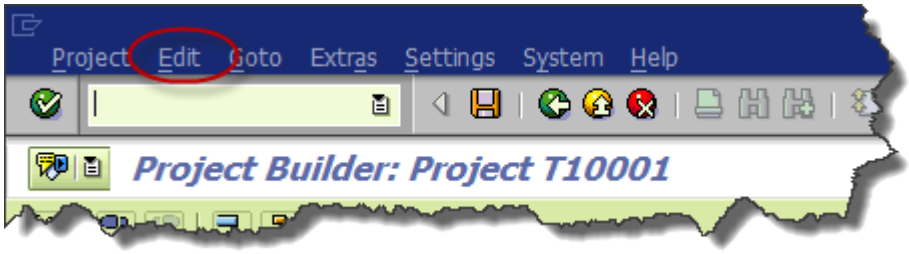
Step 3: Select the WBS Elements to have their User Statuses modified



S...	Le...	WBS element	Description	Typ	PE	Acct	Bill	System status	User Status
	1	T10001	PDOT Complex Construction Proje..	T5	✓	✓	✓	REL SETC	REL
	2	T10001.L	Right-of-way Acquisition	T5	✓			REL	REL
	3	T10001.L01	Director	T5	✓	✓		REL AUC	REL NOPU NOGR
	3	T10001.L08	IT Management	T5	✓	✓		REL AUC	REL
	3	T10001.L09	Planning	T5	✓	✓		REL AUC	REL
	3	T10001.L11	Traffic Investigation	T5	✓	✓		REL AUC	REL
	3	T10001.L19	Signals & Street Lighting	T5	✓	✓		REL AUC	REL
	3	T10001.L22	Street Lighting	T5	✓	✓		REL AUC	REL
	3	T10001.L23	Parking Enforcement	T5	✓	✓		REL AUC	REL
	3	T10001.L26	Parking Operations	T5	✓	✓		REL AUC	REL
	3	T10001.L28	Transportation Options	T5	✓	✓		REL AUC	REL
	3	T10001.L29	BTM Bureau Admin	T5	✓	✓		REL AUC	REL
	3	T10001.L30	Civil Design Engineering	T5	✓	✓		REL AUC	REL
	3	T10001.L31	Engineering Bureau Admin	T5	✓	✓		REL AUC	REL
	3	T10001.L34	Traffic Design Engine	T5	✓	✓		REL AUC	REL

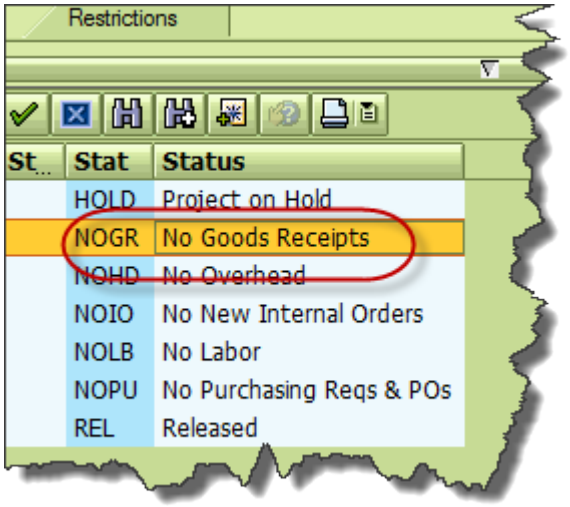
[SCREENSHOT for Step 3]

Step 4: Select the User Statuses to be set (Edit > Status > User Status > Set)



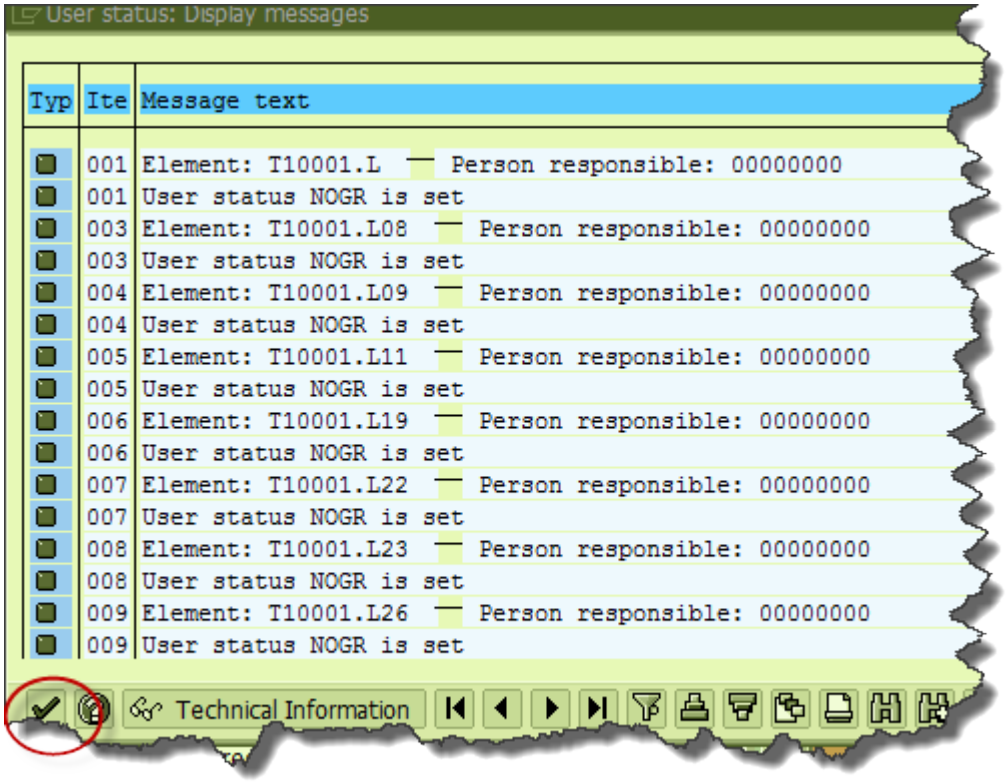
[SCREENSHOT for Step 4]

Step 5: Double Click the status you which to set.



[SCREENSHOT for Step 5]

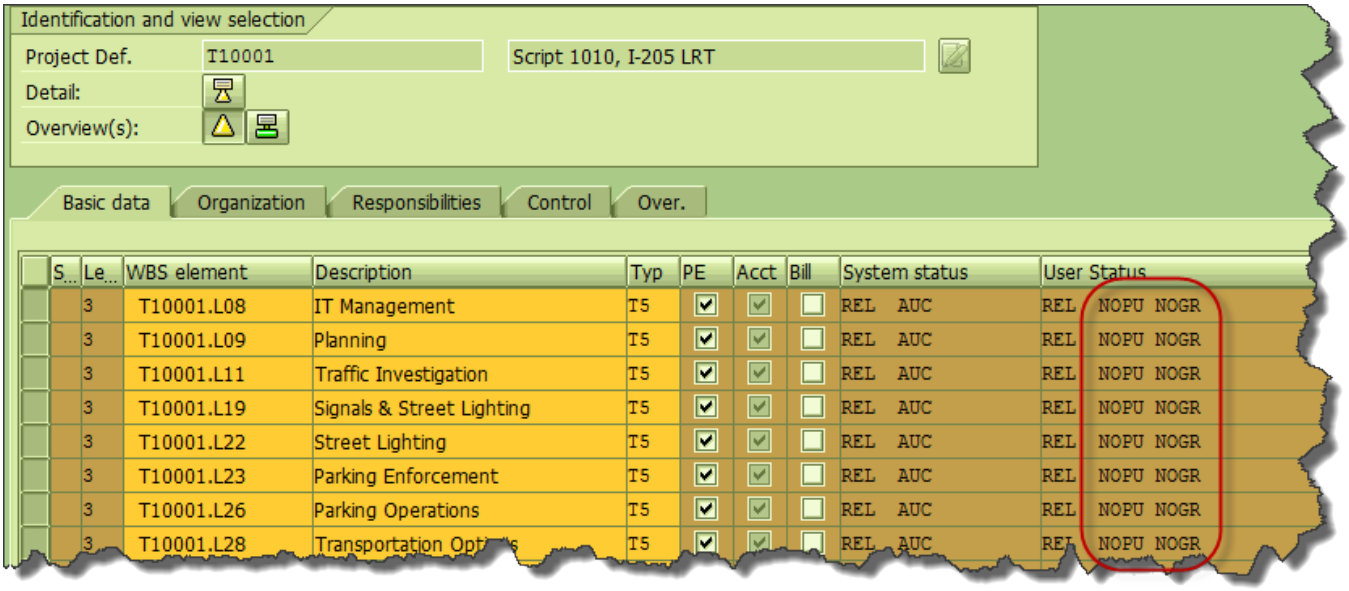
Step 6: Select the *Continue* Icon. (Note all of the WBS Elements that have been updated.)



[SCREENSHOT for Step 6]

Note: If you want more than one status set, you will need to repeat Step 4, Step 5, and Step 6 for each additional status.

Step 7: Note the changes to the User Status section



SCREENSHOT for Step 7]

Step 8: Note the changes to the User Status section

[SCREENSHOT for Step 8]