Everyone’s got to start somewhere. Becoming acquainted with Project Builder’s interface is the first step towards mastering it. In this chapter, you will learn the basics of the system, the various elements relevant to navigation, and the many icons you will need to execute available and specialized functions.

“Project Builder Basics”

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Project Builder in SAP Project System—Practical Guide

343 Pages, 2015, $69.95/€69.95

www.sap-press.com/3788
This chapter introduces Project Builder’s user interface and walks through the basics of navigation, including identifying important symbols and options to personalize Project Builder.

1 Project Builder Basics

Project Builder is a maintenance tool for personnel who manage projects in SAP Project System. This book explains the various ways in which you can maintain data. It also shows you the very best way to do things and how to get the most out of maintaining the many objects that make up a project. Let’s begin with looking at the basics.

Note that some of Project Builder’s appearance and functionality may differ from what you see in this book. There can be a number of reasons for this, but usually it will be due to one or all of the following:

- Administrator settings may render some fields invisible if your design has no use for them (this is configured in field selections and influences, which you may have no authorization to modify).
- Your installation may include custom fields not shown in a standard system (this may be controlled in SAP Project System (SAP PS) enhancements, another area you may have no authorization to modify).
- Your SAP Graphical User Interface (SAP GUI) may be set up for different font sizes and background colors.
- Certain functions may be disabled because your installation doesn’t need or allow them, or it has stopped their use due to authorization restrictions. If you find you’re unable to perform certain actions, you can check by running Transaction SU53 in a new session. There you can see what authorizations failed.
- To conform to standard SAP recommendations, your personal settings (as described in Section 1.3) should be set for optimal use. The number of levels
should be initialized as 2; otherwise, you'll be faced with performance problems with larger projects.

**Note**

This book doesn't cover the general use of SAP ERP. We assume you have a basic understand of system navigation, terminology, and to what extent your system is configured.

In this chapter, we’ll discuss the general icons and symbols you’ll come in contact with in Project Builder, as well as the primary screen you’ll see when beginning. We’ll then move on to the specific user options available, and discuss the structure of the different working areas. Finally, we’ll explore the navigation methods at your disposal as you begin your journey through Project Builder’s landscape.

### 1.1 Symbols

Each object in a project is symbolized by a unique icon. Table 1.1 describes the symbolic icons that help you recognize what each object represents, as they will be visible throughout Project Builder.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>🎩</td>
<td>PROJECT DEFINITION</td>
<td>A “hat” containing the project’s rules and uniquely identifying the project.</td>
</tr>
<tr>
<td>⚠️</td>
<td>WORK BREAKDOWN STRUCTURE</td>
<td>Subordinate cost planning/cost collecting objects that are organized to represent a hierarchy.</td>
</tr>
<tr>
<td>🏨</td>
<td>NETWORK HEADER</td>
<td>The placeholder for network activities. They carry the scheduling and organizational rules that apply to subordinate activities.</td>
</tr>
<tr>
<td>📆</td>
<td>NETWORK ACTIVITY</td>
<td>Planning/cost collecting elements that can be scheduled to form a network of dependent tasks. They are capable of raising reservations and purchase orders (POs) and also carry material components.</td>
</tr>
<tr>
<td>🏱️</td>
<td>ACTIVITY ELEMENT</td>
<td>A subset of activities used for detailed planning.</td>
</tr>
</tbody>
</table>

Table 1.1 Project Builder Icons

### 1.2 Primary Screen

To gain access to Project Builder’s primary screen, use Transaction CJ20N, as shown in Figure 1.1.

Alternatively, you can follow the menu path Project System • Basic Data • Project • Project Builder (see Figure 1.2).

With the primary screen now open, you’ll notice the different areas it contains, as shown in Figure 1.3.
These areas include the following:

- **Menu bar**: This contains initial dropdown options, some of which are also represented as icons.
- **Navigation icons**: These are used to quickly access functions. Initially, unavailable icons are grayed out.
- **Operative window**: This is where you’ll see the project structure after the project is opened.
- **Worklist and Template window**: This contains lists of projects and templates you may want to access to speed up the process of maintenance.

Now that you understand the primary screen and its structure, we can move on to the user-specific options for personalization of Project Builder.

### 1.3 User-Specific Options

From the primary screen, you can modify the settings, as shown in Figure 1.4 and Figure 1.5, which allows you to change what is presented to you.

By loading the **Settings • Options** menu, you can change what is initially presented in the primary screen to suit your specific needs.

Navigating to this menu option will reveal another window where you can modify your personal Project Builder settings, as shown in Figure 1.5.

The following sections describe the areas in the **User-Specific Options** window and their corresponding fields.
1.3.1 General Options
Under the General options area in Figure 1.5, you’ll find the following general options for Project Builder:

- **Open project with**: This option can be either Structural display or Project Planning Board (Gantt) view for the initial display.
- **Editing mode**: This option determines whether the project is loaded in Change or Display.
- **Hierarchy levels**: This option determines how many levels are initially shown (including networks). The SAP recommendation is 2. This can be adjusted after the project is loaded.
- **Preview last project**: This checkbox shows the last project you worked on in the Worklist window.
- **Display deleted objects**: This checkbox shows deleted objects in the structure (they’ll appear dimmed). This only applies to objects that are marked for deletion using the status Deletion Flag.

1.3.2 Template Options
The boxes you select will determine which template objects are offered in the Templates options area. Individual objects are shown so you can easily drag them into your structure. These are shown in the Templates section of your primary screen (see Figure 1.6).

![Figure 1.6 Templates](image)

1.3.3 Processable Objects Options
The Processable objects settings determine the types of objects you can maintain in Project Builder. Deselecting any of these will stop them from showing in the Structure window and remove them from the Templates window. At any time, these settings can be reinstated.

For example, if you deselect Simulation and then try to create a simulation, the option will be grayed out and you won’t be able to enter a simulation key. The same applies to any of these processable objects.

Now that you understand the options available to you as a user, it’s time to look at where you’ll be managing your content.

1.4 Working Areas
Project Builder is constructed of work areas, where you can manage information in a variety of ways. There are three primary work areas, as shown in Figure 1.7:

1. **Structural navigation**
   In this area, you move through the various project objects. As you do so, the Objects and Overviews window changes to reveal the object content.

2. **Worklist and templates**
   In this area, you select objects for inclusion in a project (the Worklist itself is a history of what you’ve been working with). These settings can be modified to suit your needs (see Section 1.3).

3. **Objects and overviews**
   In this area, you maintain object content (master data).
Some users like to work with the WBS/network numbering view, whereas others prefer the WBS/network description itself. It’s a personal preference, so the ability to switch views is available.

**Switching the Display Sequence**

To switch between viewing the **PROJECT STRUCTURE: DESCRIPTION** and the **IDENTIFICATION**, place the cursor on the header row or in a blank space, and right-click, as shown in Figure 1.8.

```
Figure 1.8 Display Sequence 1
```

A menu will appear, as shown in Figure 1.9.

```
Figure 1.9 Display Sequence 2
```

By clicking **DISPLAY SEQUENCE** in the contextual menu, you can switch between the different views. As shown in Figure 1.10, we’ve changed the view from that shown in Figure 1.8.

```
Figure 1.10 Switched Display Sequence
```

These settings are entirely visual and have no bearing on system performance, just user preference.

Understanding these areas and their functions are all well and good, but you must be able to navigate Project Builder efficiently to take advantage of its potential.

### 1.5 Navigation Methods

Most available tasks can be navigated in more than one way. Project Builder offers the following:

- Dropdown menus
- Icons
- Right-click context menus/function keys
These methods allow you to achieve most of what you need. However, it isn’t always possible to see what you can do in one particular way because the tasks are sometimes dependent on the object you’re pointing to. Let’s take a look at some of these navigation methods in further detail.

### 1.5.1 Dropdown Menus

Whenever you use a dropdown menu, as shown in Figure 1.11, the options available to you are mostly in relation to the object you’re currently pointing to in the structure. With dropdown menus, you can click a menu item and see a detailed menu with further options. Sometimes, you’ll see “nested” menus that take you down a further level until you reach the target (or final) menu option. If a menu option isn’t available for the object you’re currently pointing to, it will be grayed out.

Figure 1.11  Dropdown Menus 1

For instance, in the example in Figure 1.12, the same path for project definition and WBS reveals different options because you can’t level-up or level-down a project definition. Available menu options become available when pointing to project definitions.

Figure 1.12  Dropdown Menus 2

There are many menus in Project Builder. Most of the options available to you in menus are also available in other areas such as graphics icons and right-click context menus, as we’ll now discuss.

### 1.5.2 Graphics Icons

Many tasks can be performed by clicking available icons. Depending on the object on which you’re working, icons can be either active or inactive (i.e., they may be visible, but grayed out). For example, the **Back** icon and **Forwards** icon are both active if you’ve skipped between objects and the system has a place-mark to go to.

Similarly, the **Cut** icon is disabled when you’re on the project definition because it doesn’t make sense to cut it. The **Paste** icon will always be disabled unless you’ve previously cut or copied an object.

The icons discussed here also include those shown in Figure 1.13.

Figure 1.13  Graphic Icons

The following sections discuss high-level, mid-level, and low-level icon functions that you’ll encounter.

#### High-Level Icon Functions

Those icons that have a general use—not usually specific to an object—are shown in Figure 1.14.

Figure 1.14  High-Level Graphic Icons

Table 1.2 describes each high-level icon shown in Figure 1.14.
### Mid-Level Icon Functions

The mid-level icons permit navigation to other functions that may have a more specific effect on objects you’re pointing to, as shown in Figure 1.15.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>✅</td>
<td>CONFIRM</td>
<td>Confirms an action (same as pressing the Enter key).</td>
</tr>
<tr>
<td>✅</td>
<td>SAVE</td>
<td>Saves the current project and exits Project Builder.</td>
</tr>
<tr>
<td>✅</td>
<td>BACK</td>
<td>Takes you back one step.</td>
</tr>
<tr>
<td>✅</td>
<td>EXIT</td>
<td>Takes you out of Project Builder to the main SAP menu.</td>
</tr>
<tr>
<td>✅</td>
<td>CANCEL</td>
<td>Cancels changes (you’ll be given the option to save anyway).</td>
</tr>
<tr>
<td>✅</td>
<td>SEARCH (search again)</td>
<td>Initiates a search inside an object. The + means search again once an instance is found.</td>
</tr>
<tr>
<td>📡</td>
<td>PRINT</td>
<td>Print details (only available in PROJECT PLANNING BOARD and LONG TEXT).</td>
</tr>
<tr>
<td>🏛️</td>
<td>SERVICES FOR OBJECT</td>
<td>Provides a tool for attaching local documents (Microsoft Word, Excel etc.), triggering workflows, and sending messages to others via Office or email. Note: Depends on SAP version—not always visible (right-click workaround)</td>
</tr>
<tr>
<td>📅</td>
<td>PREVIOUS PAGE</td>
<td>Skip to previous page in LONG TEXT</td>
</tr>
<tr>
<td>📅</td>
<td>NEXT PAGE</td>
<td>Skip to next page in LONG TEXT</td>
</tr>
<tr>
<td>📅</td>
<td>FIRST PAGE</td>
<td>Skip to first page in LONG TEXT</td>
</tr>
<tr>
<td>📅</td>
<td>LAST PAGE</td>
<td>Skip to last page in LONG TEXT</td>
</tr>
<tr>
<td>📅</td>
<td>CREATE NEW SESSION</td>
<td>Creates a new session for you to perform other tasks without exiting Project Builder.</td>
</tr>
<tr>
<td>📅</td>
<td>CREATE SHORTCUT</td>
<td>Creates a shortcut in the default SAP directory for you to import into your FAVORITES menu. If the shortcut is imported into FAVORITES on the main SAP menu, it will take you directly into the project.</td>
</tr>
<tr>
<td>📅</td>
<td>HELP</td>
<td>Loads the PERFORMANCE ASSISTANT (Help) for the object you’re pointing to.</td>
</tr>
<tr>
<td>📅</td>
<td>CUSTOMIZE LOCAL LAYOUT</td>
<td>Allows you to change screen settings.</td>
</tr>
</tbody>
</table>

### Table 1.2 High-Level Icons

Table 1.3 describes each mid-level graphics icon.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>📅</td>
<td>DISPLAY/CHANGE</td>
<td>If you haven’t made any changes to the project, this icon switches to CHANGE or DISPLAY for the object you’re currently pointing to. <strong>Warning:</strong> If you’re pointing to a lower level than the project definition, the higher levels will be affected. If you switch from CHANGE to DISPLAY at a lower level, and then switch back to CHANGE, the higher levels will vanish from view (you must exit to get them back).</td>
</tr>
<tr>
<td>📅</td>
<td>BACK</td>
<td>When in structure view, this takes you back to the previous object (works in conjunction with FORWARDS, below).</td>
</tr>
<tr>
<td>📅</td>
<td>FORWARDS</td>
<td>When in structure view (and if you had previously used the FORWARDS icon), it will be paired with the previous position. (This is useful in large projects.)</td>
</tr>
<tr>
<td>📅</td>
<td>PROJECT PLANNING BOARD</td>
<td>This takes you to the PROJECT PLANNING BOARD view (Gantt chart). Note that the objects you see in the Project Planning Board are related to the object you’re at when the icon is clicked. Also, if your structure wasn’t expanded in Project Builder, it won’t be expanded in the PROJECT PLANNING BOARD view. If you want to see the whole project in the Project Planning Board, make sure the structure is fully expanded, and you’re pointing to the project definition. (See Chapter 8 for a full description.)</td>
</tr>
<tr>
<td>📅</td>
<td>HIERARCHY GRAPHIC</td>
<td>This takes you to the STRUCTURE HIERARCHY VIEW, which looks a bit like an organization chart. Note that the objects you see in this view are related to the object you’re at when the icon is clicked. Also, if your structure wasn’t expanded in Project Builder, it won’t be expanded in the HIERARCHY GRAPHICS view.</td>
</tr>
<tr>
<td>📅</td>
<td>NETWORK GRAPHIC</td>
<td>This takes you to the NETWORK GRAPHICS view, which details relationships between the network activities.</td>
</tr>
<tr>
<td>📅</td>
<td>MASS CHANGE</td>
<td>This allows you to change multiple values for all object content based on existing values in a project (from and to values).</td>
</tr>
</tbody>
</table>

Figure 1.15 Mid-Level Graphic Icons
Low-Level Icon Functions

The low-level icons open and create projects. They can perform maintenance on objects you’re pointing to as well, as shown in Figure 1.16.

Table 1.4 describes each low-level graphics icon.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Open Icon]</td>
<td><strong>OPEN</strong></td>
<td>Allows you to open a project, an individual WBS, or a network. You may also open a version or a simulation if available. Note that opening anything but the project definition will only open that object. Other objects in the same project will be available for other users in change mode. This is useful when working on projects collaboratively.</td>
</tr>
<tr>
<td>![Create Icon]</td>
<td><strong>CREATE</strong></td>
<td>Allows you to immediately create a new object within the project you’re working on, or entirely new objects such as whole projects, networks, simulations, material components, and so on. Current work should be saved before you create new projects or external networks. Objects available for creation depend on the object type you’re pointing to.</td>
</tr>
</tbody>
</table>

Project Builder is flexible enough for you to also access many of the functions described previously in another way: by right-clicking when pointing at an object in the structure, as described next.

### 1.5.3 Right-Click Context Menus and Function Keys

The most flexible option for accessing functions is the right-click context menu, which lists most of the tasks available in one click. For instance, the context menu, shown in Figure 1.17, only appears when you right-click in the objects and overview working area (refer back to Figure 1.7). Displayed options will relate to the object you’re pointing to. The options also have function and combination keys such as `Shift` + `F3` and so on for rapid navigation.

Table 1.3 Mid-Level Icons (Cont.)

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Cut Icon]</td>
<td><strong>CUT</strong></td>
<td>Marks an object and its subordinates ready to be cut/pasted. The affected objects will be highlighted. This icon works in conjunction with PASTE. (See UNDO to cancel the cut objects.)</td>
</tr>
<tr>
<td>![Copy Icon]</td>
<td><strong>COPY</strong></td>
<td>Marks an object (and its subordinates) ready to be copied or pasted. Works in conjunction with PASTE. The affected objects will be highlighted. (See UNDO to cancel the copied objects.)</td>
</tr>
<tr>
<td>![Paste Icon]</td>
<td><strong>PASTE</strong></td>
<td>Pastes cut or copied objects.</td>
</tr>
<tr>
<td>![Undo Icon]</td>
<td><strong>UNDO</strong></td>
<td>Undo a pasted object (revert to original).</td>
</tr>
<tr>
<td>![Delete Icon]</td>
<td><strong>DELETE</strong></td>
<td>Deletes the object you’re currently pointing to. This is a “final” deletion and doesn’t work in the same way as setting the deletion flag in status management (which can be reverted after deletion). Subordinate objects are also deleted, so be careful because you can’t retrieve the objects unless you don’t save the changes.</td>
</tr>
<tr>
<td>![Search Icon]</td>
<td><strong>SEARCH</strong></td>
<td>Performs an exact or wildcard search of either an object or values in a description. This icon is also available in Long Text searches.</td>
</tr>
<tr>
<td>![Search Again Icon]</td>
<td><strong>SEARCH AGAIN</strong></td>
<td>Repeats the search criteria of the search (above). This icon is also available in Long Text searches.</td>
</tr>
<tr>
<td>![Expand All Icon]</td>
<td><strong>EXPAND ALL</strong></td>
<td>Expands and makes visible all subordinate objects beneath the object you’re pointing to.</td>
</tr>
<tr>
<td>![Collapse All Icon]</td>
<td><strong>COLLAPSE ALL</strong></td>
<td>Collapses and hides all objects beneath the object you’re pointing to.</td>
</tr>
</tbody>
</table>

Table 1.4 Low-Level Icons (Cont.)
Figure 1.17 lists all of the functions available for the **Project Definition** and WBS elements in the dropdown menu.

Right-click on **Project Definition**
- Help F1
- Choose F2
- Back F3
- Possible Entries F4
- Slew Ctrl+G
- Cancel F12
- Display << change Shift+F1
- Exit Shift+F3
- Decision graphic Shift+F8
- Project planning board Shift+F8
- Mass change Shift+F6
- Easy Cost Planning Shift+F11
- Slew pricing Shift+F12
- Slew restraining Shift Ctrl+F1
- Release Ctrl+F2
- Settlement rule Ctrl+F3
- Project Summation Ctrl+F4
- Billing plan Ctrl+F5
- Delivery information Ctrl+F6
- Schedule Ctrl+F9
- Project team for WBS element Ctrl+F11
- Document Overview Ctrl+F12
- Depreciation simulation data Ctrl+Shift+F1
- Asset under construction Ctrl+Shift+F2
- Create completed asset Ctrl+Shift+F3
- Investment program... Ctrl+Shift+F4
- Slew pricing Ctrl+Shift+F12

Right-click on **WBS**
- Help F1
- Choose F2
- Back F3
- Possible Entries F4
- Slew Ctrl+G
- Cancel F12
- Display << change Shift+F1
- Exit Shift+F3
- Decision graphic Shift+F8
- Network graphic Shift+F7
- Project planning board Shift+F8
- Mass change Shift+F6
- Slew restraining Shift Ctrl+F1
- Release Ctrl+F2
- Settlement rule Ctrl+F3
- Project planning board Ctrl+F11
- Mass change Ctrl+F9
- Slew restraining Shift Ctrl+F1
- Investment program... Ctrl+Shift+F4
- Slew pricing Ctrl+Shift+F12

**Figure 1.17** Right-Click Functions—Project Definition and WBS

Figure 1.18 lists all of the functions available for the **Network Header** **Network Activity**, and **Activity Element**.

**Figure 1.18** Right-Click Functions—Network Header, Network Activity, and Activity Element

Right-click on **Network Header**
- Help F1
- Choose F2
- Back F3
- Possible Entries F4
- Slew Ctrl+G
- Cancel F12
- Display << change Shift+F1
- Exit Shift+F3
- Decision graphic Shift+F8
- Network graphic Shift+F7
- Project planning board Shift+F8
- Mass change Shift+F6
- Slew restraining Shift Ctrl+F1
- Release Ctrl+F2
- Settlement rule Ctrl+F3
- Project planning board Ctrl+F11
- Mass change Ctrl+F9
- Slew restraining Shift Ctrl+F1

Right-click on **Network Activity**
- Help F1
- Choose F2
- Back F3
- Possible Entries F4
- Slew Ctrl+G
- Cancel F12
- Display << change Shift+F1
- Exit Shift+F3
- Decision graphic Shift+F8
- Network graphic Shift+F7
- Project planning board Shift+F8
- Mass change Shift+F6
- Slew restraining Shift Ctrl+F1

Right-click on **Activity Element**
- Help F1
- Choose F2
- Back F3
- Possible Entries F4
- Slew Ctrl+G
- Cancel F12
- Display << change Shift+F1
- Exit Shift+F3
- Decision graphic Shift+F8
- Network graphic Shift+F7
- Project planning board Shift+F8
- Mass change Shift+F6

**Figure 1.19** lists all of the functions available for **Material Component** and **PS Text**.

**Figure 1.19** Right-Click Functions—Material Component and PS Text

Right-click on **Material Component**
- Help F1
- Choose F2
- Back F3
- Possible Entries F4
- Slew Ctrl+G
- Cancel F12
- Display << change Shift+F1
- Exit Shift+F3
- Decision graphic Shift+F8
- Network graphic Shift+F7
- Project planning board Shift+F8
- Mass change Shift+F6
- Slew restraining Shift Ctrl+F1

Right-click on **PS Text**
- Help F1
- Choose F2
- Back F3
- Possible Entries F4
- Slew Ctrl+G
- Cancel F12
- Display << change Shift+F1
- Exit Shift+F3
- Decision graphic Shift+F8
- Network graphic Shift+F7
- Project planning board Shift+F8
- Mass change Shift+F6

**Figure 1.19** Right-Click Functions—Material Component and PS Text
1.6 Summary

In this chapter we introduced you to the generic functions available with Project Builder. Once digested and understood, this will greatly assist you in using the remaining specific functionality you’ll be introduced to throughout this book.

In the next chapter, we’ll discuss how to create projects and WBS elements and maintain their fields.
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Project Builder in SAP Project System—Practical Guide

343 Pages, 2015, $69.95/€69.95

www.sap-press.com/3788

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