

CJ02 - Update project to asset under construction

STEP 1

If a request is received to change project to Asset Under Construction (AUC) you should go to **CJ02**, insert the project code or WBS element code and **Enter**

You will see all the WBS structure of the project.

Change Project: Initial Screen

Project Def. R-005AUX085

WBS Element

Change Project: Initial Screen

Project Def.

WBS Element R-005AUX085

Change Project: WBS Element Overview

Proj. def. R-005AUX085

X085 Product development for D540/640

Basic Data

Dates

Assignments

Responsibilities

Control

Total

S...	WBS element	Description	Short ID	Typ	Pri	Su	PE	Acct
1	R-005AUX085	X085 Product development for D540/640	WE-2015-03	R1				
1				R1				

STEP 2

Considering that is not possible to change the WBS codification, and also not possible to change existing settlement, as you can see by the color (is not white) of fields of first line, you should create a new WBS, filling the second line of screen above, with the same codification, but ending with letter C (as for capitalization).

This new WBS will be set up for capitalization using type R2 and settlement to AUC as described in the current procedure. Keep the same WBS element codification (with C at the end), the same Description and the same Short ID; insert "2" in column "Level" and "R2" in column "Typ"; and select the same options of the first line in the columns "Su", "PE", "Acct" and "Bill"

Maintain Settlement Rule: Overview

WBS element R-005AUX085

X085 Product development for D540/640

Actual settlement

Distribution rules

Col	Settlement Receiver	Receiver Short Text	%	Equivalence no.	Amount	A. Se...	No. S...	From Per...	From...	To...	To Per...	Pr...
CTR	00000001	2193E	100,00	0	0,00	Per...	1	10	2015	12	9999	011

Change Project: WBS Element Overview

Proj. def. R-005AUX085

X085 Product development for D540/640

Basic Data

Dates

Assignments

Responsibilities

Control

Total

S...	Level	WBS element	Description	Short ID	Typ	Pri	Su	PE	Acct	Bill
1		R-005AUX085	X085 Kalk D540/640 - Next gen 2955	WE-2015-03	R1					
2		R-005AUX085C	X085 Kalk D540/640 - Next gen 2955	WE-2015-03	R2					
1					R1					

STEP 3

Then you should select the first line and go to "Settlement Rule"

Settlement Rule

On the *Maintain Settlement Rule: Overview* screen, you should change the settlement parameters to WBS, tracking the menu "Goto" and the option "Settlement parameters", inserting the code "ZPS12" in the field of the Settlement profile and the code "BG" in the field of the Allocation structure.

Settlement rule

Edit

Goto

System

Help

Change Documents

Details F2

Next rule

Previous rule

Other rules...

Settlement parameters F8

Overview

Views

Back F3

Maintain Settlement Rule: Overview

WBS element R-005AUX085

X085 Kalk D540/640

Actual settlement

Distribution rules

Maintain Settlement Rule: Parameters

WBS element: R-U05AUX085
X085 Kalx D540/640 - Next gen 2955

Parameters

Description: [Empty field]

Settlement profile: ZPS12 R&D - WBS->WBS (CE original)

Allocation structure: BG R&D - WBS->WBS (CE 9370000000)

PA transfer str.: [Empty field]

Source structure: [Empty field]

Asset Value Date: [Empty field]

Hierarchy number: [Empty field]

Strategy Sequence: [Empty field]

Entered by: PT63016524 on 22.10.2015
Last changed by: PT63022051 on 08.03.2016

STEP 4

Then you should click on "Back (F3)" ; insert the last period and the current year in the columns "To Period" and "To Fiscal Year" of first line, relative to old settlement receiver; insert "WBS" in the column "Cat", the code of changed project ending with letter C in the column "Settlement Receiver", and the current period and the current year in the columns "To Period" and "To Fiscal Year" of second line, as shown by the screen below;

and press  two times.

You will see in your screen the following message

Maintain Settlement Rule: Overview

WBS element: R-U05AUX085
X085 Kalx D540/640 - Next gen 2955

Actual settlement

Distribution rules	Settlement Receiver	Receiver Short Text	%	Equivalence no.	Amount	A. Se...	No. S...	From Per...	From...	To ...	To Fis...	Peri...
CTR 0007000001	RBB Z195E		100,00	0	0,00							
WBS R-U05AUX085C										2014	2016	2011

EP-Settlement rule: Display messages

Typ: Message: text

Receiver categ. CTR is not allowed by settlement prof. ZPS12 for this

☒ New entry ☒ Technical Information ☒ Current display variant

And you should click on  to continue.

STEP 5

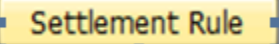
Then you should deselect the first line and select the second line

Change Project: WBS Element Overview

Proj. def.: R-U05AUX085 X085 Product development for D540/640

S-Level WBS element	Description	Short ID	Typ	Phi	Su	PE	Acct	Be
Subdivided D5AUX085	X085 Kalx D540/640 - Next gen 2955	HE-2015-03	R1					
2 R-U05AUX085C	X085 Kalx D540/640 - Next gen 2955	HE-2015-03	R2					
1			R1					

STEP 6

You should go to settlement rule  and change the settlement parameters to AUC, on the menu "Goto", "Settlement parameters", and insert the code "ZPS11" in the field of Settlement profile and the code "BF" in the field of Allocation structure

Finally, you should click on  twice and save by clicking on 

Maintain Settlement Rule: Parameters

WBS element: R-U05AUX085C
X085 Kalx D540/640 - Next gen 2955

Parameters

Description: [Empty field]

Settlement profile: ZPS11 R&D - WBS->AUC (CE 7211000000)

Allocation structure: BF R&D - WBS->AUC (CE 7211000000)

PA transfer str.: [Empty field]

Source structure: [Empty field]

Asset Value Date: [Empty field]

Hierarchy number: [Empty field]

Strategy Sequence: [Empty field]

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STEP 7

If you go to CJ03 (display mode), and insert the code of changed project you can verify the new System status in the column with same name as "REL AUC".

Display Project: WBS Element Overview

Summarization

Proj. def.

R-U05AUX085
X085 Product development for DS40/640

Basic Data
Dates
Assignments
Responsibilities
Control
Total

S...	L...	WBS element	Short ID	Typ	Pri	Su	PE	Acct	Bill	System status
1	R-U05AUX085	ME-2015-03	R1			☐	☒	☒	☒	REL SETC
2	R-U05AUX085C	ME-2015-03	R2			☐	☒	☒	☒	REL AUC