

# CJ02 - Change Work Breakdown Structure

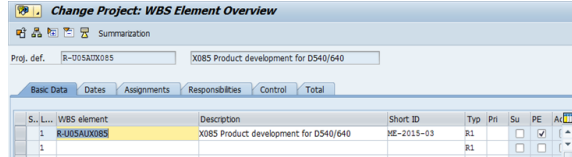
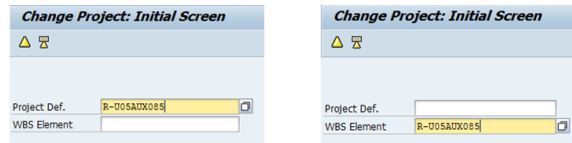
There are different possibilities for this transaction:

## 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

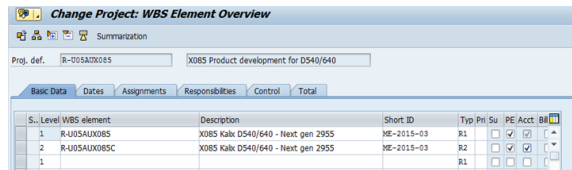
You will see all the WBS structure of the project.



## 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).

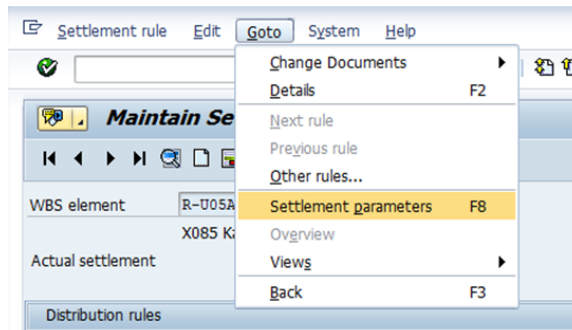
This new WBS will be set up for capitalization using type R2 and settlement to AUC as described in the current procedure. Keep the same WBS element codification (with C at the end), the same Description and the same Short ID; insert "2" in column "Level" and "R2" in column "Typ"; and select the same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



## STEP 3

Then you should select the first line and go to "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.



**Maintain Settlement Rule: Parameters**



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

Parameters

Description		
Settlement profile	ZPS12	R&D - WBS->WBS (CE original)
Allocation structure	BG	R&D - WBS->WBS (CE 9370000000)
PA transfer str.		
Source transfer str.		
Asset Value Date		
Hierarchy number		
Strategy Sequence		

Entered by: FT63016524 on 22.10.2015  
Last changed by: FT63022051 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 bellow; and press  two times.

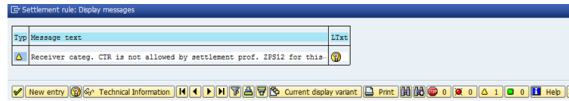
**Maintain Settlement Rule: Overview**


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

Actual settlement

Distribution rules	Receiver	Short Text	%	Equivalence no.	Amount	A. Se...	No. S...	From Per...	From...	To...	To Fis...	Prst
CTR	08F2100001	R&B Z193E	100,00	0	0,00			2015	2	2016	011	
WBS	R-U05AUX085C							2016	2			

You will see in your screen the following message



And you should click on  to continue.

**STEP 5**

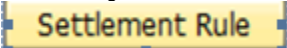
Then you should deselect the first line and select the second line

**Change Project: WBS Element Overview**

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

S_Level	WBS element	Description	Short ID	Typ.	Pr.	Su	PE	Acct	Bt
*	Subdivided 05AUX085	X085 Kalx D540/640 - Next gen 2955	ME-2015-03	R1					
2	R-U05AUX085C	X085 Kalx D540/640 - Next gen 2955	ME-2015-03	R2					

**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



**Maintain Settlement Rule: Parameters**

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

Parameters

Description		
Settlement profile	ZPS11	R&D - WBS->AUC (CE 7211000000)
Allocation structure	BF	R&D - WBS->AUC (CE 7210000000)
PA transfer str.		
Source transfer str.		
Asset Value Date		
Hierarchy number		
Strategy Sequence		

Entered by: FT63022051 on 08.03.2016  
Last changed by: FT63022051 on 08.03.2016

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

**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".

S.	L.	WBS element	Short ID	Typ	Pri	Su	PE	Acct	Bill	System status
1		R-U05ALX085	ME-2015-03	R1		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	REL_SETC
2		R-U05ALX085C	ME-2015-03	R2		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	REL_AUC

**STEP 1**

If a request is received to change a project to Fixed Asset

Go to **CJ02** and select the project

**Change Project: Initial Screen**

Project Def.

WBS Element

**STEP 2**

Select the WBS/Line where you want to create as final assets: **Extras -> Create completed Asset**

**Change Project: WBS Element**

Project Def. R-U05ALX026

WBS Element X026 P

Menu: Extras -> Create completed asset

S.	L.	WBS element	Description	Short ID	Typ
1		R-U05ALX026	X026 PPA for Auto/EE (AE-4133)	AM-648	R2

**STEP 3**

Go to the next screen and complete the missing information provided in the request: **Asset Class** and **Cost center**.

**Create Asset:**

Asset(s) to be created

Asset Class

Company code / asset

Number of similar assets

Subnumber

Reference

Company code / asset

Master data

Description

Inventory number

Business Area

Cost Center

Plant

Location

In the bottom of the SAP screen the following message will appear:

1 assets created internally, and distribution rules created

**STEP 4**

Go the settlement rule of the WBS to confirm you have a new line for the final asset.


WBS element R-U05ALX026

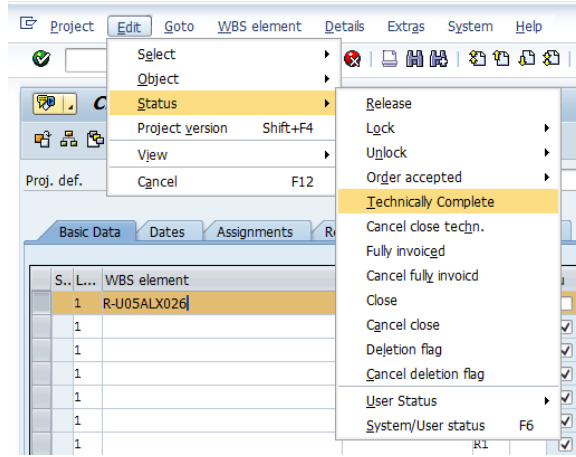
X026 PPA for Auto/EE (AE-4133)

Actual settlement

Def...	Receiver	Receiver Short Text	%	Equivalence no.	Seq. No.	S...	Fr...	From...	To ...	To Pl...	First Used	Last Used
FA	15000003370-0	X026 PPA for Auto/EE (...)	100,00	0	ABC	1	0				003.2013	005.2013
FA	10720000001-0	X026 PPA for Auto/EE (...)			FUL	2						

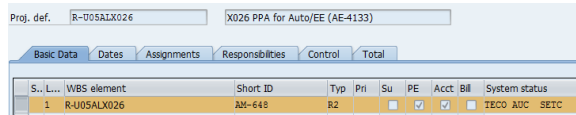
**STEP 5**

Then go back  to the previous screen, in order to set up the project as Technically completed: **Edit -> Status -> Technically complete.**




**STEP 6**

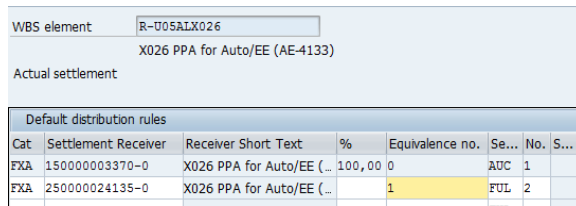
Check if the status in WBS is **"TECO"**.



**STEP 7**

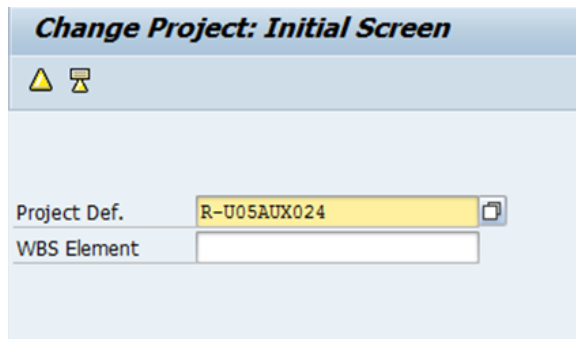
The project can now be **saved** .

Then, display again the project and settlement rule, in order to find the final asset number as below ( eg: 250000024135-0).



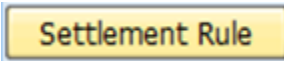
**STEP 1**

Go to CJ02.  
Enter the project.

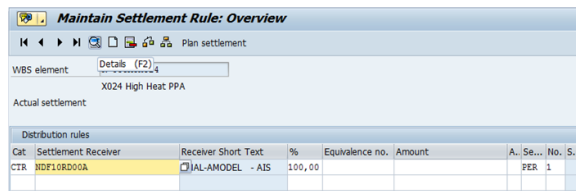


**STEP 2**

Select the project and click on "Settlement rule"



Click twice on the line of the Settlement rule or click on "Details".



STEP 3

Change the "Valid to" period.

**Maintain Settlement Rule: Distribution Rules**

Settlement Sender  
WBS element: R-U05AUX024  
X024 High Heat PPA  
Company Code: S978  
Actual settlement

Settlement Receiver  
Cost Center: NDF10RD00A FINAL-AMODEL - A...  
Order

Distribution Rule  
Number: 1 Valid from: to 2014  
Settlement type: PER  
Percent: 100,00 %  
Equivalence no.:  
Amount in EUR: Amt rule type: Settle Each Period  
Strategy:

STEP 4

Go back to the previous screen and click on "Go to" and "Settlement parameters".

Settlement rule Edit Goto System Help

- Change Documents
- Details F2
- Next rule
- Previous rule
- Other rules...
- Settlement parameters F8**
- Overview
- View
- Back F3

WBS element: R-U05AUX024  
X024 High Heat PPA  
Actual settlement

Cat	Settlement Receiver	Receiver Short Text	%	Equivalence no.	Amount	A.	Se...
CTR	NDF10RD00A	FINAL-AMODEL - AIS	100,00				PER

STEP 5

Change the "Settlement profile" to ZPS12 and "Allocation structure" to BG.

**Maintain Settlement Rule: Parameters**

WBS element: R-U05AUX024  
X024 High Heat PPA

Parameters

Description

Settlement profile: ZPS12 R&D - WBS->WBS (CE original)  
Allocation structure: BG R&D - WBS->WBS (CE 9370000000)  
PA transfer str.:  
Source structure:  
Asset Value Date:  
Hierarchy number:  
Strategy Sequence:

Entered by: PT400066 on 24.09.2013  
Last changed by: BRS0069 on 21.03.2014

STEP 6

Go back to the previous screen and click on "New rule".

**Maintain Settlement Rule: Overview**


Plan settlement

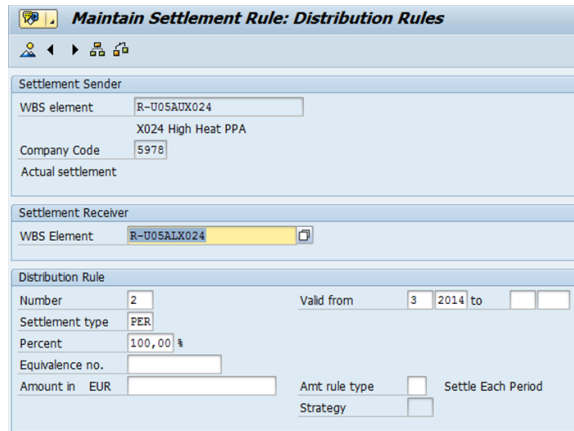
WBS element: R-U New rule (F9)  
X024 High Heat PPA  
Actual settlement

Cat	Settlement Receiver	Receiver Short Text	%	Equiva
CTR	NDF10RD00A	FINAL-AMODEL - AIS	100,00	

**STEP 7**

Inform the new WBS element and the "Valid from" as below.

Go back to the previous screen and save it .



**Maintain Settlement Rule: Distribution Rules**

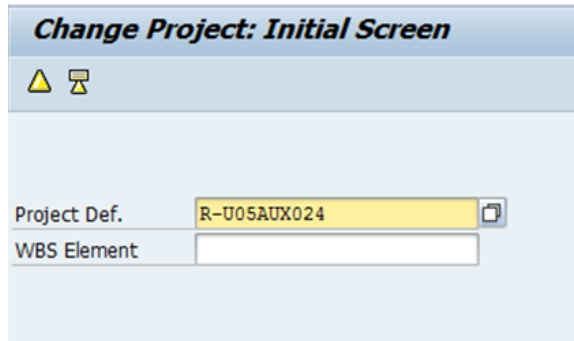
Settlement Sender  
WBS element: R-005AUX024  
X024 High Heat PPA  
Company Code: 5978  
Actual settlement

Settlement Receiver  
WBS Element: R-005ALX024

Distribution Rule  
Number: 2  
Valid from: 3 2014 to: [ ] [ ]  
Settlement type: PER  
Percent: 100,00 %  
Equivalence no.: [ ]  
Amount in EUR: [ ]  
Amt rule type: [ ] Settle Each Period  
Strategy: [ ]

**STEP 1**

To update the settlement rule of project to order, go to CJ02 and insert the code of project.



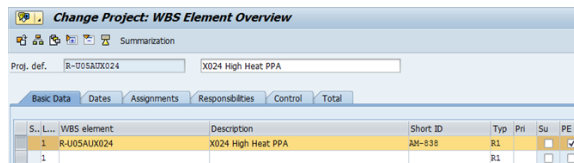
**Change Project: Initial Screen**

Project Def.: R-005AUX024

WBS Element: [ ]

**STEP 2**

Select the line related to project and click on **Settlement Rule**.




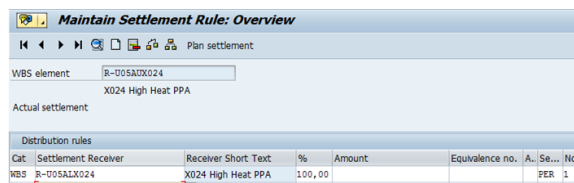
**Change Project: WBS Element Overview**

Proj. def.: R-005AUX024 X024 High Heat PPA

S...	WBS element	Description	Short ID	Typ	Pri	Su	PE
1	R-005AUX024	X024 High Heat PPA	AM-838	R1			<input checked="" type="checkbox"/>
1				R1			<input type="checkbox"/>

**STEP 3**

Then you should click on "New rule (F9)" , or click twice on the line of the settlement rule

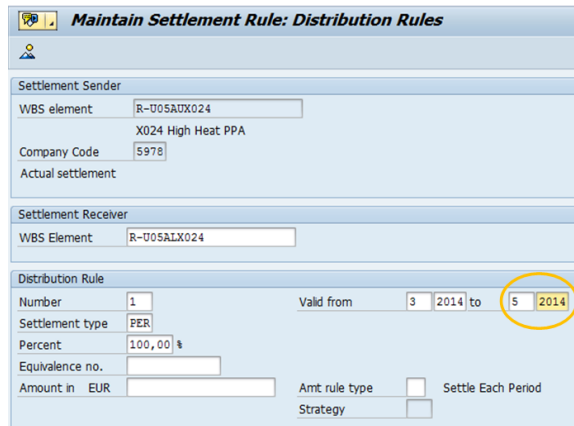


**Maintain Settlement Rule: Overview**

WBS element: R-005AUX024  
X024 High Heat PPA  
Actual settlement

Cat.	Settlement Receiver	Receiver Short Text	%	Amount	Equivalence no.	A.	Se...	No.
WBS	R-005ALX024	X024 High Heat PPA	100,00				PER	1

and change the field "Valid to" to previous period, as illustrated.



**Maintain Settlement Rule: Distribution Rules**

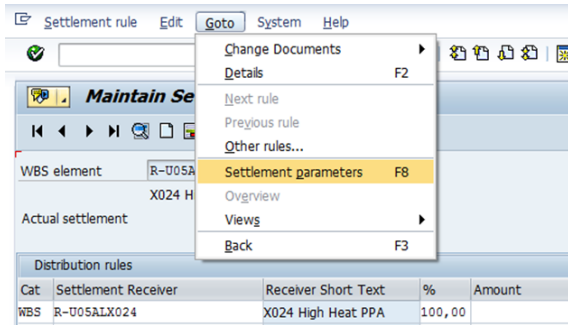
Settlement Sender  
WBS element: R-005AUX024  
X024 High Heat PPA  
Company Code: 5978  
Actual settlement

Settlement Receiver  
WBS Element: R-005ALX024

Distribution Rule  
Number: 1  
Valid from: 3 2014 to: 5 2014  
Settlement type: PER  
Percent: 100,00 %  
Equivalence no.: [ ]  
Amount in EUR: [ ]  
Amt rule type: [ ] Settle Each Period  
Strategy: [ ]

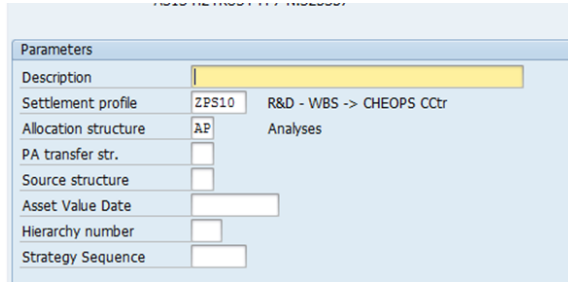
**STEP 4**

Go back to the previous screen and click on "Go to" and "Settlement parameters".



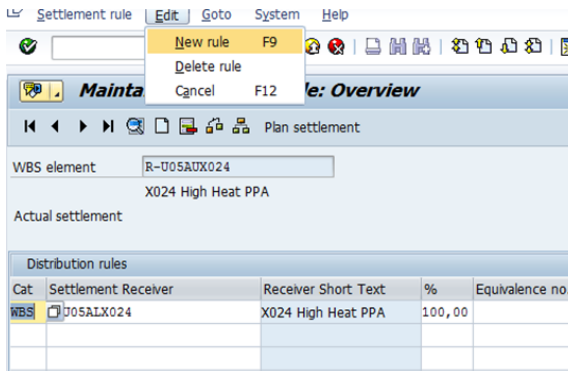
**STEP 5**

Change the "Settlement profile" to **ZPS10** and "Allocation structure" to **AP**.



**STEP 6**

Go back to the previous screen and click on "New rule".



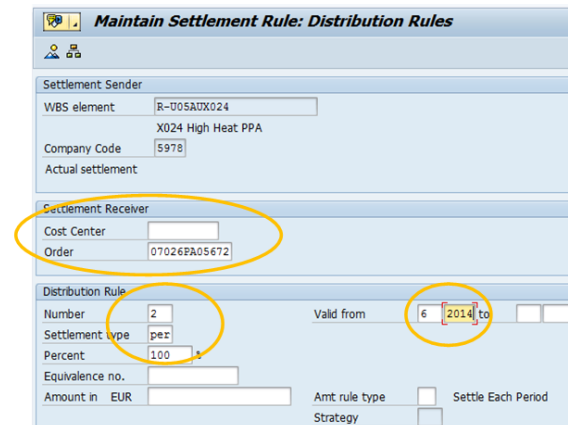
**STEP 7**

Inform the new Cost center and the "**Valid from**" to the period the project should start being settled using the new settlement rule.

**Number:** New settlement rule number (sequential).

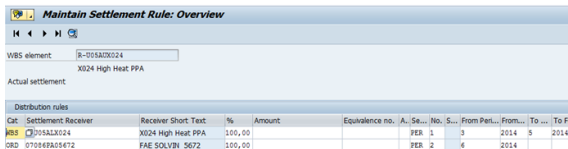
**Settlement type:** PER

Percent: if 100% or less





**STEP 8**


Go back to the previous and now, you should find the two settlement rules




**STEP 9**



Go back  to the previous screen and save it .

If the below message appears

Delete the old settlement rule, by clicking on "Delete rule" 

Then go back  to the previous screen and save it .

LEP Settlement rule: Display messages

Typ	Message text	LText
	Receiver categ. WBS is not allowed by settlement prof. ZFS10 for this	

**Maintain Settlement Rule: Overview**

Plan settlement

WBS element: R-U05AUX024  
X024 High Heat PPA

Actual settlement

**STEP 1**

To update the settlement rule of project to cost center, go to **CJ02** and insert the code of project.

**Change Project: Initial Screen**

Project Def.: R-U05AUX024

WBS Element

**STEP 2**

Select the line related to project and click on **Settlement Rule**.

**Change Project: WBS Element Overview**

Summary

Proj. def.: R-U05AUX024 X024 High Heat PPA

S...	WBS element	Description	Short ID	Typ	Pri	Su	PE
1	R-U05AUX024	X024 High Heat PPA	AB-939	R1		<input type="checkbox"/>	<input checked="" type="checkbox"/>
1				R1		<input type="checkbox"/>	<input type="checkbox"/>

**Maintain Settlement Rule: Overview**


WBS element: R-U05AUX024  
X024 High Heat PPA

Actual settlement

Distribution rules

Cat	Settlement Receiver	Receiver Short Text	%	Amount	Equivalence no.	A. Se...	No.
WBS	R-U05AUX024	X024 High Heat PPA	100,00			PER	1

**STEP 3**

Click on "New rule (F9)"  and change the field "Valid to" to previous period.

**Maintain Settlement Rule: Distribution Rules**

Settlement Sender  
WBS element: R-005AUX024  
X024 High Heat PPA  
Company Code: S978  
Actual settlement

Settlement Receiver  
WBS Element: R-005ALX024

Distribution Rule  
Number: 1      Valid from: 3 2014 to 5 2014  
Settlement type: PER  
Percent: 100,00  
Equivalence no.:  
Amount in EUR:      Amt rule type:      Settle Each Period:      Strategy:

**STEP 4**

Go back to the previous screen and click on the menu "Goto", "Settlement parameters", and insert the code "ZPS10" in the field of Settlement profile and the code "BE" in the field of 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

WBS element: R-005A  
X024 H  
Actual settlement

Cat	Settlement Receiver	Receiver Short Text	%	Amount
WBS	R-005ALX024	X024 High Heat PPA	100,00	

**STEP 5**

Change the "Settlement profile" to **ZPS10** and "Allocation structure" to **BE**.

A313 H2TRUST-FP7 N.325357

Parameters

Description:

Settlement profile: ZPS10      R&D - WBS -> CHEOPS Cctr

Allocation structure: BE      R&D - WBS->CHEOPS Cctr

PA transfer str.:

Source structure:

Asset Value Date:

Hierarchy number: 0

Strategy Sequence:

**STEP 6**

Go back to the previous screen and click on "New rule (F9)" or go to the menu Edit, New rule.

Settlement rule Edit Goto System Help

New rule F9  
Delete rule  
Cancel F12

WBS element: R-005AUX024  
X024 High Heat PPA  
Actual settlement

Cat	Settlement Receiver	Receiver Short Text	%	Equivalence no.
WBS	R-005ALX024	X024 High Heat PPA	100,00	

**STEP 7**

Inform the new Cost center and the "**Valid from**" to the period the project should start being settled using the new settlement rule.

**Number:** New settlement rule number (sequential).

**Settlement type:** PER

Percent: if 100% or less

**Maintain Settlement Rule: Distribution Rules**

Settlement Sender  
WBS element: R-005A0X024  
X024 High Heat PPA  
Company Code: S978  
Actual settlement

Settlement Receiver  
Cost Center: NDF10RBBOA  
Order

Distribution Rule  
Number: 2  
Settlement type: per  
Percent: 100 %  
Valid from: 6 2014 to  
Equivalence no.:  
Amount in EUR: Amt rule type: Settle Each Period  
Strategy:

**STEP 8**

Go back to the previous and now, you should find the two settlement rules

Go back  to the previous screen and save it 

**Maintain Settlement Rule: Overview**

WBS element: R-005A0X024  
X024 High Heat PPA  
Actual settlement

Cat	Settlement Receiver	Receiver Short Text	%	Amount	Equivalence no.	A.	Se...	No. (S...	From Per...	To ...	To Fl...	
WBS	R-005A0X024	X024 High Heat PPA	100,00				PER	2	3	2014	5	2014
CTR	NDF10RBBOA	FRNAL DEP - AIS	100,00				PER	2	4	2014		