



Transfer Position to Different Organizational Unit (PQ13)

Purpose

Use this procedure to transfer a currently filled position to another organization structure.

Trigger

Perform this procedure when you need to transfer a position to a different organizational unit.

Prerequisites

- Filled positions
- New organizational unit

Menu Path

Use the following menu path to begin this transaction:

N/A

Transaction Code

PQ13

Helpful Hints

- R/O/C column in tables represents Required, Optional, or Conditional entry
- This work instruction and recording has two transactions: **PQ13** and **PA40**
 - **PQ13** - Transfer position to a different organizational unit: performed by the OM Position Administrator
 - **PA40** - Enter Regular Action for position transfer: performed by the PA BHR Quality Assurance
- If transferring employee is in a pay scale, the next increase date field in Basic Pay (0008) infotype needs to be populated



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Procedure

1. Start the transaction using the menu path or transaction code. The *Actions for Position* screen displays.

Actions for Position

The screenshot shows the SAP 'Actions for Position' screen. The interface includes a menu bar (Action, Edit, Goto, Extras, Settings, System, Help) and a toolbar with various icons. The main area is divided into a left sidebar and a main content area. The sidebar has a 'Find by' section with options for Position, Search Term, and Structure Search. The main content area contains several input fields: Plan Version (01 Current plan), Position (highlighted in yellow), Object name, and a Selection Criteria section with fields for Infotype status (1), Validity (06/03/2009 to 12/31/9999), and Action (S). The status bar at the bottom shows '220 sapqr2 INS'.

2. Click **Position** field  .



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Actions for Position

- As required, complete/review the following fields:

Field	R/O/C	Description
Position	R	Organizational objects held by employees and assigned to organizational units which may inherit characteristics from its organizational unit or the assigned job. Example: 400000065

- Click **Validity** field .



PQ13

Work Instruction

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5. As required, complete/review the following fields:

Field	R/O/C	Description
Validity	R	Date that identifies the start of a validity period. Example: 060209

6. Click **Action** field .
7. Click **Action** matchcode . The *Action (XXXX)* dialog box displays.



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Action (XXXX) YYYY Entries found

Restrictions

Act.	Action text
72S	Create/Maintain CoP Position Doublefill
73S	Create/Maint COP Pos Casual/Casual Other
77S	Modify CoP Position Attributes
78S	Transfer COP Position to Different Org
80S	Maintain OM Monitoring of Tasks

5 Entries found

8. Double-click **78S Transfer COP Position to Different Org** list item
78S Transfer COP Position to Different Org



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Actions for Position

The screenshot shows the SAP 'Actions for Position' interface. The top menu bar includes 'Action', 'Edit', 'Goto', 'Extras', 'Settings', 'System', and 'Help'. The SAP logo is in the top right corner. Below the menu is a toolbar with various icons. The main area is titled 'Actions for Position' and contains a search sidebar on the left with options: 'Position', 'Search Term', and 'Structure Search'. The main content area has the following fields:

Plan Version	01	Current plan
Position	400000065	
Object name		

Below these fields is a 'Selection Criteria' section:

Infotype status	1	
Validity	060209	to 12/31/9999
Action	78S	

The bottom status bar shows '220', 'sapqr2', and 'INS'.

9. Click **Execute** button . The *Create Relationships* screen displays.



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Create Relationships

The screenshot shows the SAP 'Create Relationships' dialog box. At the top, there is a menu bar with 'Infotype', 'Edit', 'Goto', 'Extras', 'View', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main area is titled 'Create Relationships' and contains the following fields and buttons:

- Position:** Adm Ast Administrative Assistant
- Planning Status:** Active
- Valid from:** 06/02/2009 to 12/31/9999. A 'Change Information' button is next to the date range.
- Relationships:** Relationship type/relationship: A 003 Belongs to
- Related Object:** Type of related object: O Organizational unit. Below this are input fields for ID of related object, Abbreviation, and Name.
- Priority:** A checkbox.

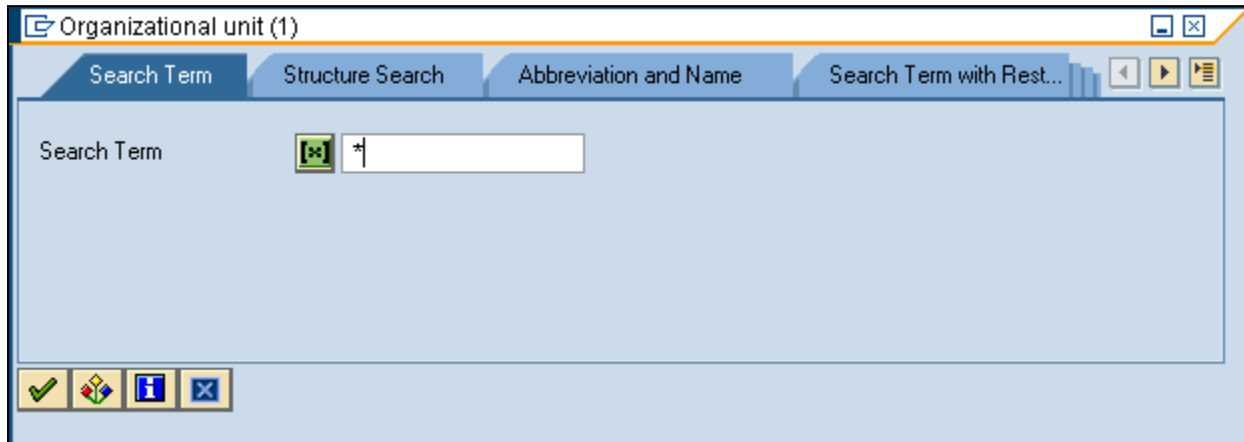
At the bottom right of the dialog, the status bar shows 'DRP (1) 310 sapdrp INS'.

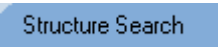
10. Click **ID of related object** field .
11. Click **ID of related object** matchcode  . The *Organizational unit (XXXX)* dialog box displays.



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Organizational unit (XXXX)

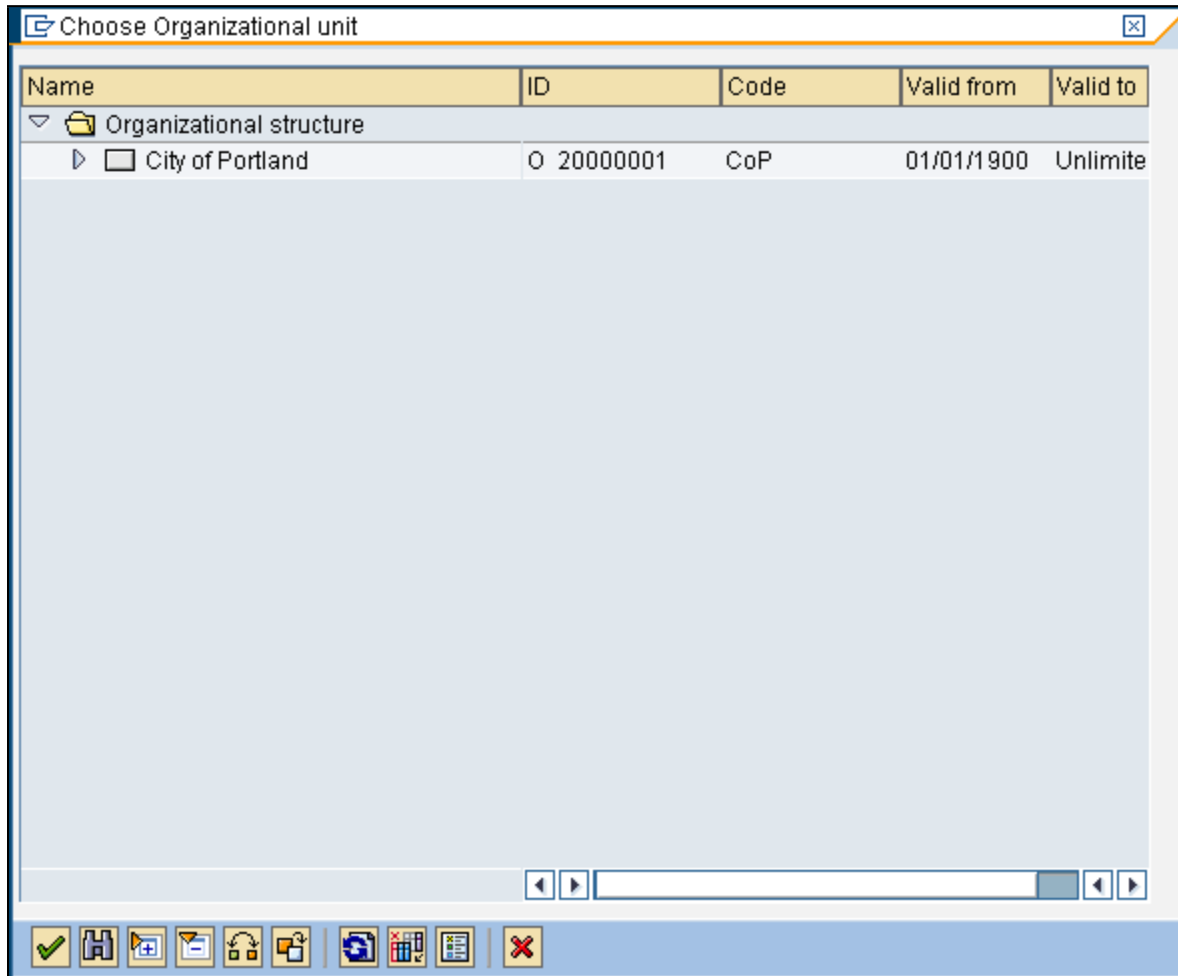





12. Click **Structure Search** tab . The *Choose Organizational unit* dialog box displays.



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Choose Organizational unit



13. Click **City of Portland** tree item  . The tree expands.
14. Click **Office of the Mayor** tree item  . The tree expands.
15. Click **Office of the City Attorney** row item **Office of the City Attorney** . The row highlights.
16. Click **Enter (continue)** button  .



Transfer Position to Different Organizational Unit (PQ13)

Create Relationships

The screenshot shows the SAP 'Create Relationships' dialog box. At the top, there is a menu bar with 'Infotype', 'Edit', 'Goto', 'Extras', 'View', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main area is titled 'Create Relationships' and contains the following fields:

- Position: Adm Ast (Administrative Assistant)
- Planning Status: Active
- Valid from: 06/02/2009 to 12/31/9999
- Relationship type/relationship: A 003 Belongs to
- Related Object section:
 - Type of related object: O Organizational unit
 - ID of related object: 20000059
 - Abbreviation: (empty)
 - Name: (empty)
- Priority: (checkbox)

At the bottom right, there is a status bar showing 'DRP (1) 310 sapdrp INS'.

17. Click **Save** button . The *Relationships Create* dialog box displays.

Relationships Create

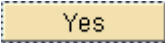
The screenshot shows the 'Relationships Create' dialog box. It has a title bar with 'Relationships Create' and a close button. The main area contains the following text:

Previous record will be delimited at end. Do you want to save?

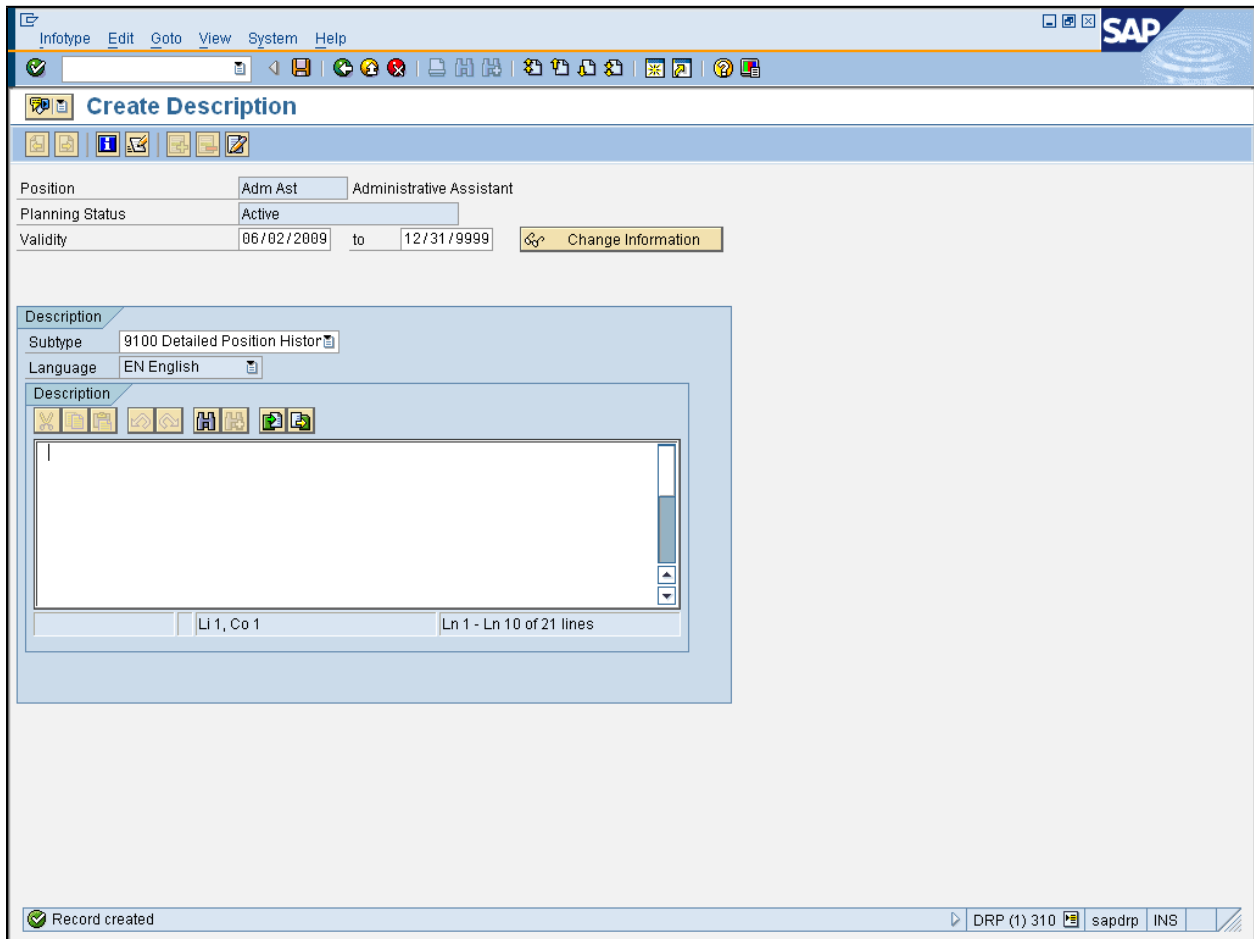
At the bottom, there are three buttons: 'Yes', 'No', and 'Cancel'.



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18. Click **Yes** button . The *Create Description* screen displays.

Create Description



The screenshot shows the SAP 'Create Description' screen. At the top, there is a menu bar with 'Infotype', 'Edit', 'Goto', 'View', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main area contains the following fields:

- Position:** Adm Ast Administrative Assistant
- Planning Status:** Active
- Validity:** 06/02/2009 to 12/31/9999. A 'Change Information' button is next to it.
- Description Section:**
 - Subtype:** 9100 Detailed Position Histor
 - Language:** EN English
 - Description Long Text field:** A large text area with a toolbar above it and a status bar below it showing 'Ln 1, Co 1' and 'Ln 1 - Ln 10 of 21 lines'.

At the bottom of the screen, a status bar shows 'Record created' on the left and 'DRP (1) 310 sapdrp INS' on the right.

19. Click **Description Long Text** field



The system displays the message, "Record created".

20. As required, complete/review the following fields:

Field	R/O/C	Description
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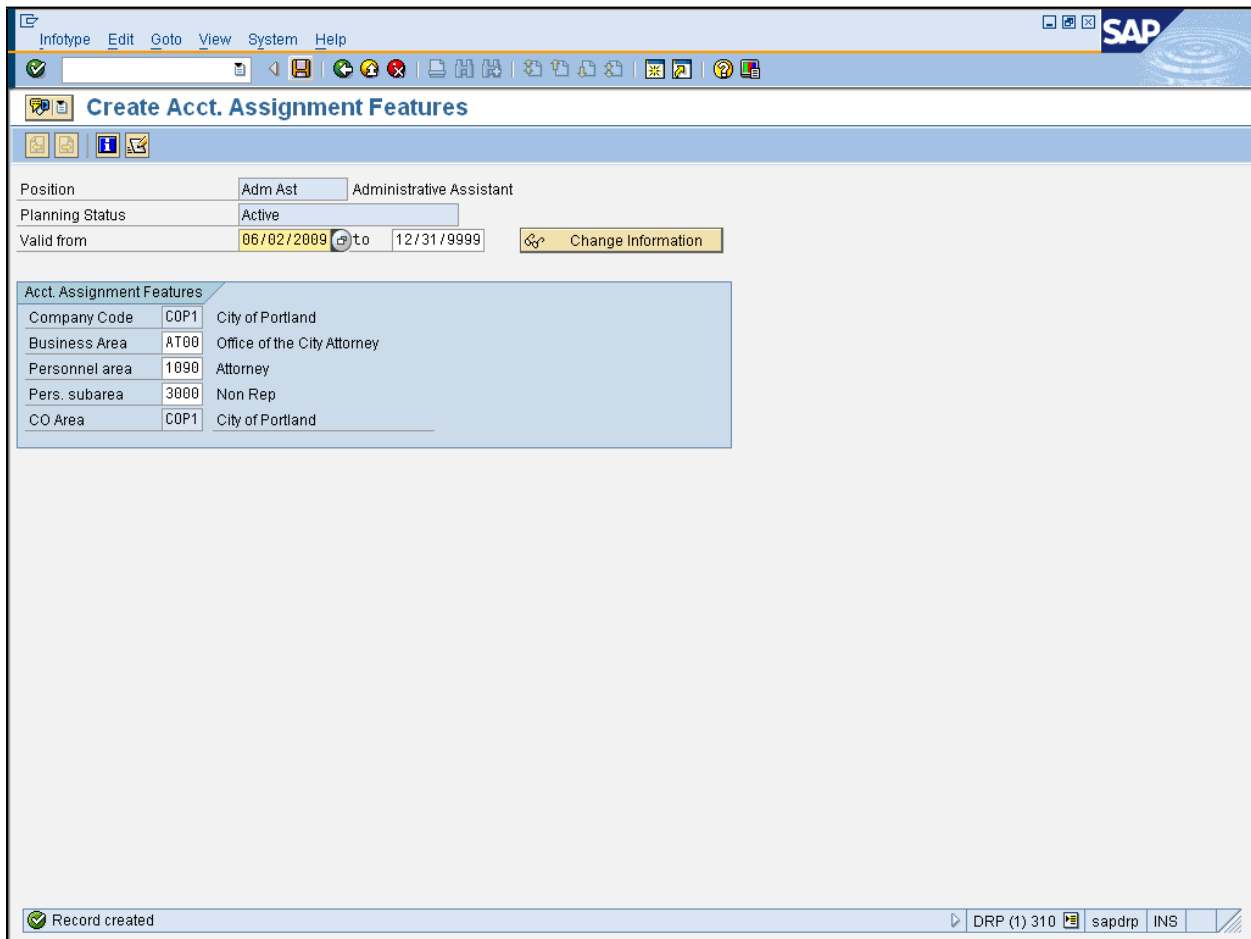


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Field	R/O/C	Description
Description	R	Free text field used to provide additional information or a description. Example: Position transferred to City Attorney's office on 6/2/2009

21. Click **Save** button  . The *Create Acct. Assignment Features* screen displays.

Create Acct. Assignment Features



The screenshot shows the SAP GUI interface for the 'Create Acct. Assignment Features' transaction. The title bar includes 'Infotype Edit Goto View System Help' and the SAP logo. The main content area displays the following information:

- Position: Adm Ast Administrative Assistant
- Planning Status: Active
- Valid from: 06/02/2009 to 12/31/9999
- A 'Change Information' button is visible next to the valid dates.
- An 'Acct. Assignment Features' table is displayed below:

Acct. Assignment Features		
Company Code	COP1	City of Portland
Business Area	AT00	Office of the City Attorney
Personnel area	1090	Attorney
Pers. subarea	3000	Non Rep
CO Area	COP1	City of Portland

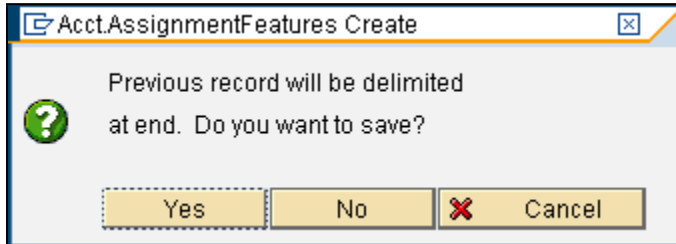
At the bottom of the screen, a status bar shows 'Record created' and 'DRP (1) 310 sapdrp INS'.

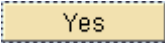
22. Click **Save** button  . The *Acct.AssignmentFeatures Create* dialog box displays.



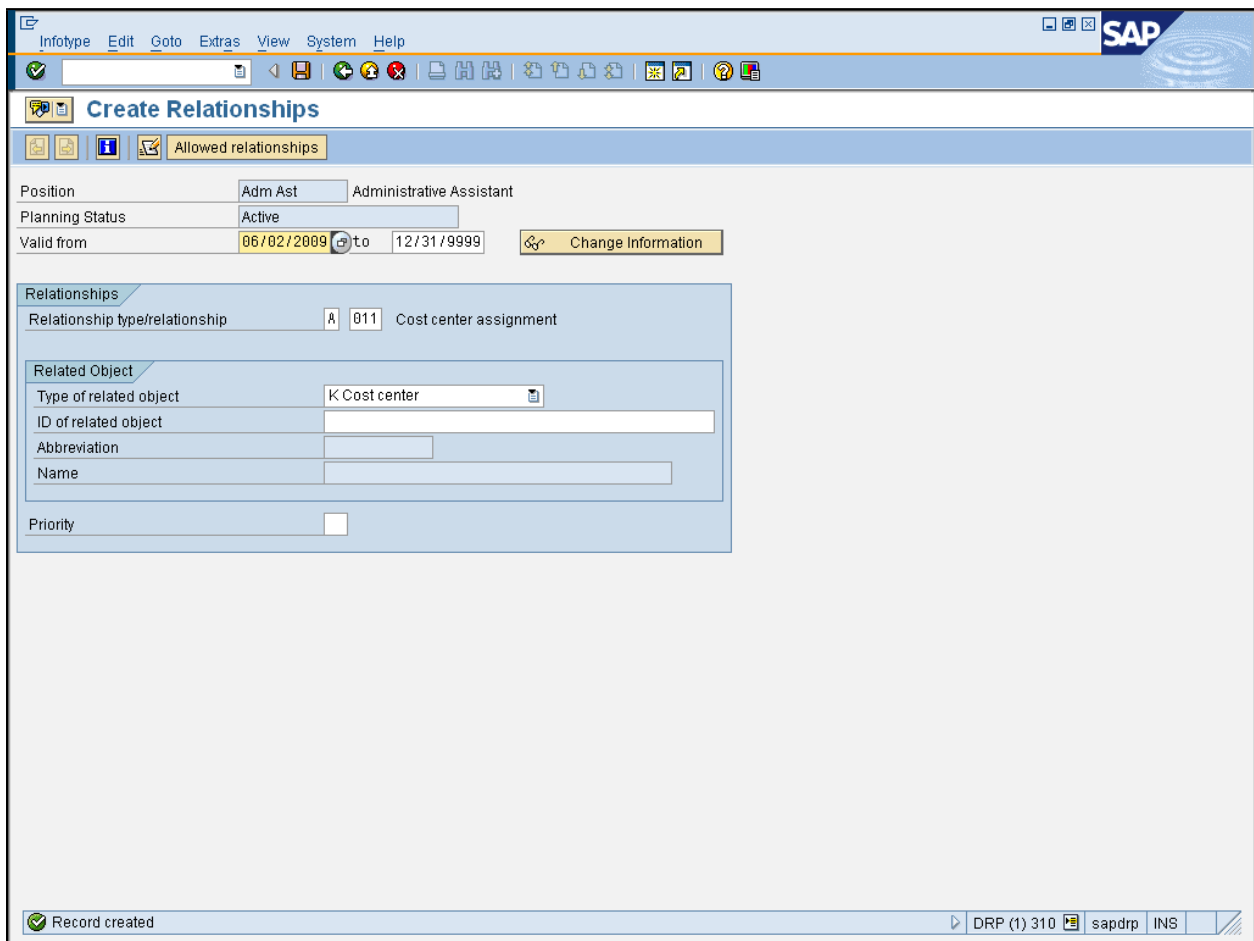
Transfer Position to Different Organizational Unit (PQ13)

Acct.AssignmentFeatures Create



23. Click **Yes** button  . The *Create Relationships* screen displays.


Create Relationships






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24. Click ID of related object field

 The system displays the message, "Record created".

25. Click ID of related object matchcode  . The Cost center (XXXX) dialog box displays.

Cost center (XXXX)

Field	Value
Cost Center	1
Controlling Area	COP1
Company Code	COP1
Cost Center Category	
Person Responsible	
User Responsible	ACMARTY
Cost ctr short text	
Language Key	EN
Maximum No. of Hits	500

26. Click Enter (continue) button  . The Cost center (XXXX) dialog box displays.



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Cost center (XXXX) YYYY Entries found

Cost Ctr	COAr	CoCd	CCTC	Person Responsible	User Resp.	Short text	Language	Valid From	to
ATAT000001	COP1	COP1	N	Ana Kalmanek	ACMARTY	CITY ATTORNEY	EN	01/01/1900	12/31/9999
AUCA000001	COP1	COP1	N	Drummond Kahn	ACMARTY	AUDIT SERVICES	EN	01/01/1900	12/31/9999
AUCA000002	COP1	COP1	N	Leslie Stevens	ACMARTY	IND POLICE REVIEW	EN	01/01/1900	12/31/9999
AUCA000003	COP1	COP1	N	Scott Stewart	ACMARTY	PROGRESS BOARD	EN	01/01/1900	12/31/9999
AUCA000004	COP1	COP1	N	Michael Mills	ACMARTY	OMBUDSMAN OFFICE	EN	01/01/1900	12/31/9999
AUCA000005	COP1	COP1	N	Gregory Frank	ACMARTY	HEARINGS OFFICE	EN	01/01/1900	12/31/9999
AUCA000006	COP1	COP1	N	Gary Blackmer	ACMARTY	CITY AUDITOR	EN	01/01/1900	12/31/9999
AUDA000001	COP1	COP1	N	Diane Betcher	ACMARTY	MANAGEMENT SERVICES	EN	01/01/1900	12/31/9999
AUDA000002	COP1	COP1	N	Toni Anderson	ACMARTY	COUNCIL/CONTRACTS	EN	01/01/1900	12/31/9999
AUDA000003	COP1	COP1	N	Diana Banning	ACMARTY	ARCHIVES & RECORDS	EN	01/01/1900	12/31/9999
AUDA000004	COP1	COP1	N	Dan Schmidt	ACMARTY	ASSMTS/FIN/FORECLOSE	EN	01/01/1900	12/31/9999
AUDA000005	COP1	COP1	N	Diane Betcher	ACMARTY	CAMPAIGN FINANCE	EN	01/01/1900	12/31/9999
AUDA000006	COP1	COP1	N	Dan Schmidt	ACMARTY	LID CONSTRUCTION	EN	01/01/1900	12/31/9999
AUDA000007	COP1	COP1	N	Dan Schmidt	ACMARTY	ACF	EN	01/01/1900	12/31/9999
AUDA000008	COP1	COP1	N	Dan Schmidt	ACMARTY	ASSESSMENT PROGRAM	EN	01/01/1900	12/31/9999
AUDA000009	COP1	COP1	N	Dan Schmidt	ACMARTY	DEBT ACTIVITY	EN	01/01/1900	12/31/9999
CBCF000002	COP1	COP1	N	Sebastian Rodrigues	ACMARTY	PCM	EN	01/01/1900	12/31/9999
CBMH000001	COP1	COP1	N	Sebastian Rodrigues	ACMARTY	MHCRC ADM	EN	01/01/1900	12/31/9999
CBMH000002	COP1	COP1	N	Sebastian Rodrigues	ACMARTY	MHCRC EC	EN	01/01/1900	12/31/9999
CBMH000003	COP1	COP1	N	Sebastian Rodrigues	ACMARTY	PEG ME	EN	01/01/1900	12/31/9999
CBMH000004	COP1	COP1	N	Sebastian Rodrigues	ACMARTY	PEG PCM	EN	01/01/1900	12/31/9999
CBMH000005	COP1	COP1	N	Sebastian Rodrigues	ACMARTY	PEG CAP ADMIN	EN	01/01/1900	12/31/9999
CBMH000006	COP1	COP1	N	Sebastian Rodrigues	ACMARTY	PEG I-NET ADMIN	EN	01/01/1900	12/31/9999
CBMH000007	COP1	COP1	N	Sebastian Rodrigues	ACMARTY	PEG CAP	EN	01/01/1900	12/31/9999
CBMH000008	COP1	COP1	N	Sebastian Rodrigues	ACMARTY	PEG ACC	EN	01/01/1900	12/31/9999
CBUF000001	COP1	COP1	N	Sebastian Rodrigues	ACMARTY	UTILITY	EN	01/01/1900	12/31/9999
DRDR000001	COP1	COP1	N	Nancy Hartline	ACMARTY	RETIREMENT PAYMENTS	EN	01/01/1900	12/31/9999
DRDR000002	COP1	COP1	N	Nancy Hartline	ACMARTY	PERS CONTRIBUTIONS	EN	01/01/1900	12/31/9999
DRDR000003	COP1	COP1	N	Nancy Hartline	ACMARTY	DISAB & DEATH BEN	EN	01/01/1900	12/31/9999
DRDR000004	COP1	COP1	N	Nancy Hartline	ACMARTY	ADMINISTRATION	EN	01/01/1900	12/31/9999
DRDR000005	COP1	COP1	N	Nancy Hartline	ACMARTY	DEBT ACTIVITY	EN	01/01/1900	12/31/9999
DSAS000002	COP1	COP1	N	Denise Kleim	ACMARTY	INFORMATION SERVICES	EN	01/01/1900	12/31/9999
DSCS000001	COP1	COP1	N	Alisa Cour	ACMARTY	CUSTOMER SERVICE	EN	01/01/1900	12/31/9999

27. Select **Cost Center** list item **ATAT000001** . The row highlights.

28. Click **Enter (continue)** button  .



Transfer Position to Different Organizational Unit (PQ13)

Create Relationships

Infotype Edit Goto Extras View System Help

Create Relationships

Allowed relationships

Position Adm Ast Administrative Assistant
Planning Status Active
Valid from 06/02/2009 to 12/31/9999 [Change Information](#)



Relationships

Relationship type/relationship A 011 Cost center assignment

Related Object

Type of related object K Cost center
ID of related object ATAT000001COP1
Abbreviation
Name
Priority

DRP (1) 310 sapdrp INS

29. Click **Save** button  . The screen updates.
30. Click **Save** button  . The *Create Cost Distribution* screen displays.



Transfer Position to Different Organizational Unit (PQ13)

Create Cost Distribution

Position: Adm Ast Administrative Assistant
 Planning Status: Active
 Start date: 06/02/2009 to 12/31/9999
 Master cost center: ATAT000001 City Attorney

COAr	Cost ctr	Order	WBS element	Name	Pct.	Name of

New entries: Entry 1 / 0

Record created

31. Click COAr field .



The system displays the message, "Record created".

32. As required, complete/review the following fields:

Field	R/O/C	Description
COAr	R	The organizational unit within cost accounting that represents the City. Always enter COP1. Example: cop1



Transfer Position to Different Organizational Unit (PQ13)

- 33. Click **Cost ctr** field  .
- 34. Click **Cost ctr matchcode**  . The *Cost Center (XXXX)* dialog box displays.

Cost Center (XXXX)

- 35. Click **Cost Center** field .
- 36. As required, complete/review the following fields:

Field	R/O/C	Description
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PQ13

Work Instruction

Transfer Position to Different Organizational Unit (PQ13)

Field	R/O/C	Description
Cost Center	R	Organizational unit(s) that represents a revenue or cost collector. Example: *

37. Click **Enter (continue)** button . The *Cost Center (XXXX)* dialog box displays.



Transfer Position to Different Organizational Unit (PQ13)

Cost Center (XXXX) YYYY Entries found

Cost Ctr	COAr	CoCd	CCTC	Person Responsible	User Resp.	Short text	Language	Valid From	to
ATAT000001	COP1	COP1	N	Ana Kalmanek	ACMARTY	CITY ATTORNEY	EN	01/01/1900	12/31/9999
AUCA000001	COP1	COP1	N	Drummond Kahn	ACMARTY	AUDIT SERVICES	EN	01/01/1900	12/31/9999
AUCA000002	COP1	COP1	N	Leslie Stevens	ACMARTY	IND POLICE REVIEW	EN	01/01/1900	12/31/9999
AUCA000003	COP1	COP1	N	Scott Stewart	ACMARTY	PROGRESS BOARD	EN	01/01/1900	12/31/9999
AUCA000004	COP1	COP1	N	Michael Mills	ACMARTY	OMBUDSMAN OFFICE	EN	01/01/1900	12/31/9999
AUCA000005	COP1	COP1	N	Gregory Frank	ACMARTY	HEARINGS OFFICE	EN	01/01/1900	12/31/9999
AUCA000006	COP1	COP1	N	Gary Blackmer	ACMARTY	CITY AUDITOR	EN	01/01/1900	12/31/9999
AUDA000001	COP1	COP1	N	Diane Betcher	ACMARTY	MANAGEMENT SERVICES	EN	01/01/1900	12/31/9999
AUDA000002	COP1	COP1	N	Toni Anderson	ACMARTY	COUNCIL/CONTRACTS	EN	01/01/1900	12/31/9999
AUDA000003	COP1	COP1	N	Diana Banning	ACMARTY	ARCHIVES & RECORDS	EN	01/01/1900	12/31/9999
AUDA000004	COP1	COP1	N	Dan Schmidt	ACMARTY	ASSMTS/FIN/FORECLOSE	EN	01/01/1900	12/31/9999
AUDA000005	COP1	COP1	N	Diane Betcher	ACMARTY	CAMPAIGN FINANCE	EN	01/01/1900	12/31/9999
AUDA000006	COP1	COP1	N	Dan Schmidt	ACMARTY	LID CONSTRUCTION	EN	01/01/1900	12/31/9999
AUDA000007	COP1	COP1	N	Dan Schmidt	ACMARTY	ACF	EN	01/01/1900	12/31/9999
AUDA000008	COP1	COP1	N	Dan Schmidt	ACMARTY	ASSESSMENT PROGRAM	EN	01/01/1900	12/31/9999
AUDA000009	COP1	COP1	N	Dan Schmidt	ACMARTY	DEBT ACTIVITY	EN	01/01/1900	12/31/9999
CBCF000002	COP1	COP1	N	Sebastian Rodrigues	ACMARTY	PCM	EN	01/01/1900	12/31/9999
CBMH000001	COP1	COP1	N	Sebastian Rodrigues	ACMARTY	MHCRC ADM	EN	01/01/1900	12/31/9999
CBMH000002	COP1	COP1	N	Sebastian Rodrigues	ACMARTY	MHCRC EC	EN	01/01/1900	12/31/9999
CBMH000003	COP1	COP1	N	Sebastian Rodrigues	ACMARTY	PEG ME	EN	01/01/1900	12/31/9999
CBMH000004	COP1	COP1	N	Sebastian Rodrigues	ACMARTY	PEG PCM	EN	01/01/1900	12/31/9999
CBMH000005	COP1	COP1	N	Sebastian Rodrigues	ACMARTY	PEG CAP ADMIN	EN	01/01/1900	12/31/9999
CBMH000006	COP1	COP1	N	Sebastian Rodrigues	ACMARTY	PEG I-NET ADMIN	EN	01/01/1900	12/31/9999
CBMH000007	COP1	COP1	N	Sebastian Rodrigues	ACMARTY	PEG CAP	EN	01/01/1900	12/31/9999
CBMH000008	COP1	COP1	N	Sebastian Rodrigues	ACMARTY	PEG ACC	EN	01/01/1900	12/31/9999
CBUF000001	COP1	COP1	N	Sebastian Rodrigues	ACMARTY	UTILITY	EN	01/01/1900	12/31/9999
DRDR000001	COP1	COP1	N	Nancy Hartline	ACMARTY	RETIREMENT PAYMENTS	EN	01/01/1900	12/31/9999
DRDR000002	COP1	COP1	N	Nancy Hartline	ACMARTY	PERS CONTRIBUTIONS	EN	01/01/1900	12/31/9999
DRDR000003	COP1	COP1	N	Nancy Hartline	ACMARTY	DISAB & DEATH BEN	EN	01/01/1900	12/31/9999
DRDR000004	COP1	COP1	N	Nancy Hartline	ACMARTY	ADMINISTRATION	EN	01/01/1900	12/31/9999
DRDR000005	COP1	COP1	N	Nancy Hartline	ACMARTY	DEBT ACTIVITY	EN	01/01/1900	12/31/9999
DSAS000002	COP1	COP1	N	Denise Kleim	ACMARTY	INFORMATION SERVICES	EN	01/01/1900	12/31/9999
DSCS000001	COP1	COP1	N	Alisa Cour	ACMARTY	CUSTOMER SERVICE	EN	01/01/1900	12/31/9999

38. Select Cost Center list item **ATAT000001** .

39. Click Enter (continue) button  .



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Create Cost Distribution

40. As required, complete/review the following fields:

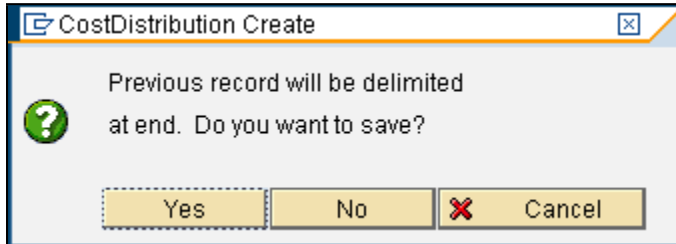
Field	R/O/C	Description
Pct.	R	The percentage of the position covered by the controlling area and cost center. Example: 100

41. Click **Save** button  . The *CostDistribution Create* dialog box displays.



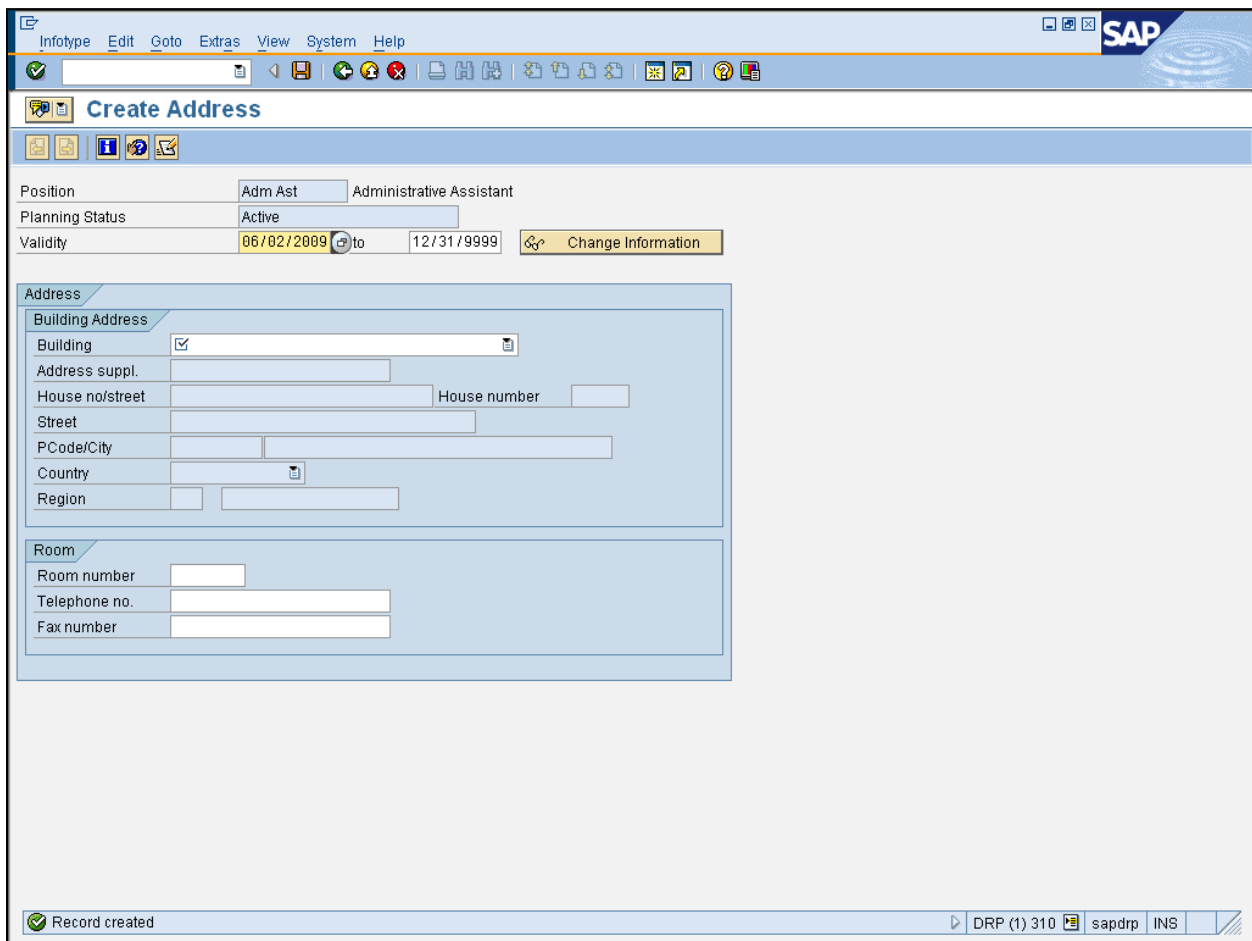
Transfer Position to Different Organizational Unit (PQ13)

CostDistribution Create



42. Click **Yes** button  . The *Create Address* screen displays.

Create Address






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43. Click **Building** field  . A drop-down list displays.

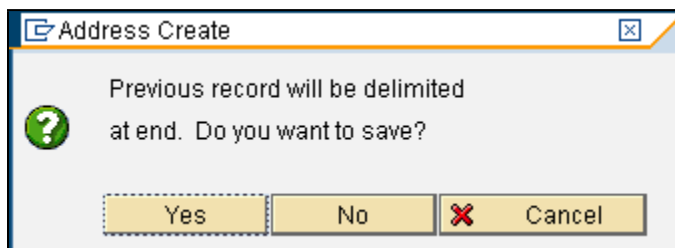


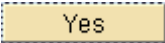
The system displays the message, "Record created".

44. Select **131 City Hall** list item  .

45. Click **Save** button  . The *Address Create* dialog box displays.

Address Create



46. Click **Yes** button  . The *Actions for Position* screen displays.



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Actions for Position

47. Click **Command** field .



The system displays the message, "Infotype sequence updated in database".

48. As required, complete/review the following fields:

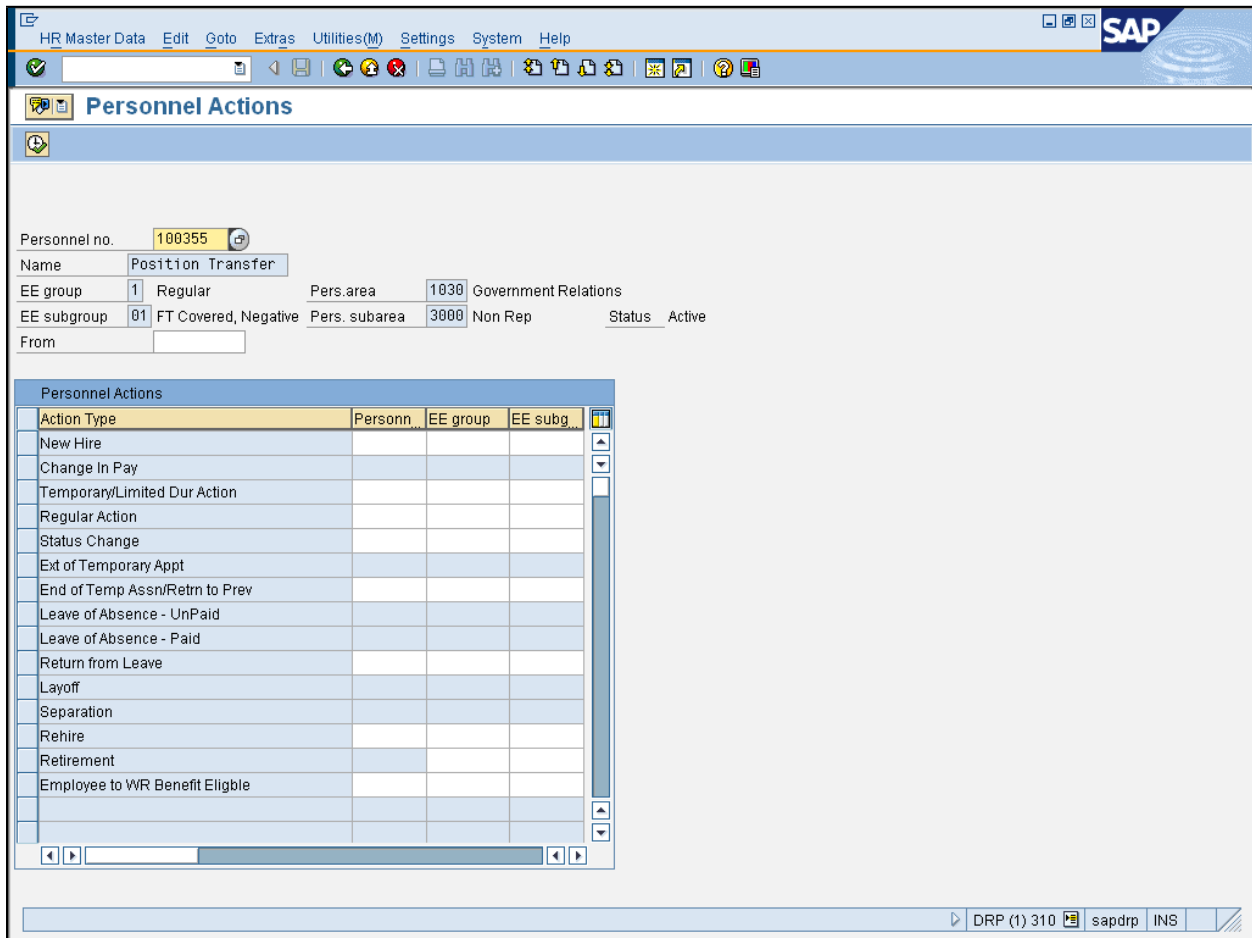
Field	R/O/C	Description
Command	R	Action/transaction to be performed or completed. Example: /npa40




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49. Click **Enter** button . The *Personnel Actions* screen displays.

Personnel Actions



The screenshot shows the SAP Personnel Actions screen. At the top, there is a menu bar with options: HR Master Data, Edit, Goto, Extras, Utilities(M), Settings, System, Help. Below the menu bar is a toolbar with various icons. The main area of the screen displays the following information:

Personnel no. 

Name

EE group Regular Pers.area Government Relations

EE subgroup FT Covered, Negative Pers. subarea Non Rep Status

From

Below this information is a table titled "Personnel Actions" with the following columns: Action Type, Personn..., EE group, EE subg..., and a column with up/down arrows. The table contains the following rows:

Action Type	Personn...	EE group	EE subg...	
New Hire				
Change In Pay				
Temporary/Limited Dur Action				
Regular Action				
Status Change				
Ext of Temporary Appt				
End of Temp Assn/Retrn to Prev				
Leave of Absence - UnPaid				
Leave of Absence - Paid				
Return from Leave				
Layoff				
Separation				
Rehire				
Retirement				
Employee to WR Benefit Eligible				

At the bottom right of the screen, there is a status bar showing: DRP (1) 310 sapdrp INS


50. As required, complete/review the following fields:

Field	R/O/C	Description
From	R	Beginning value to be entered when specifying a range. Example: 060209

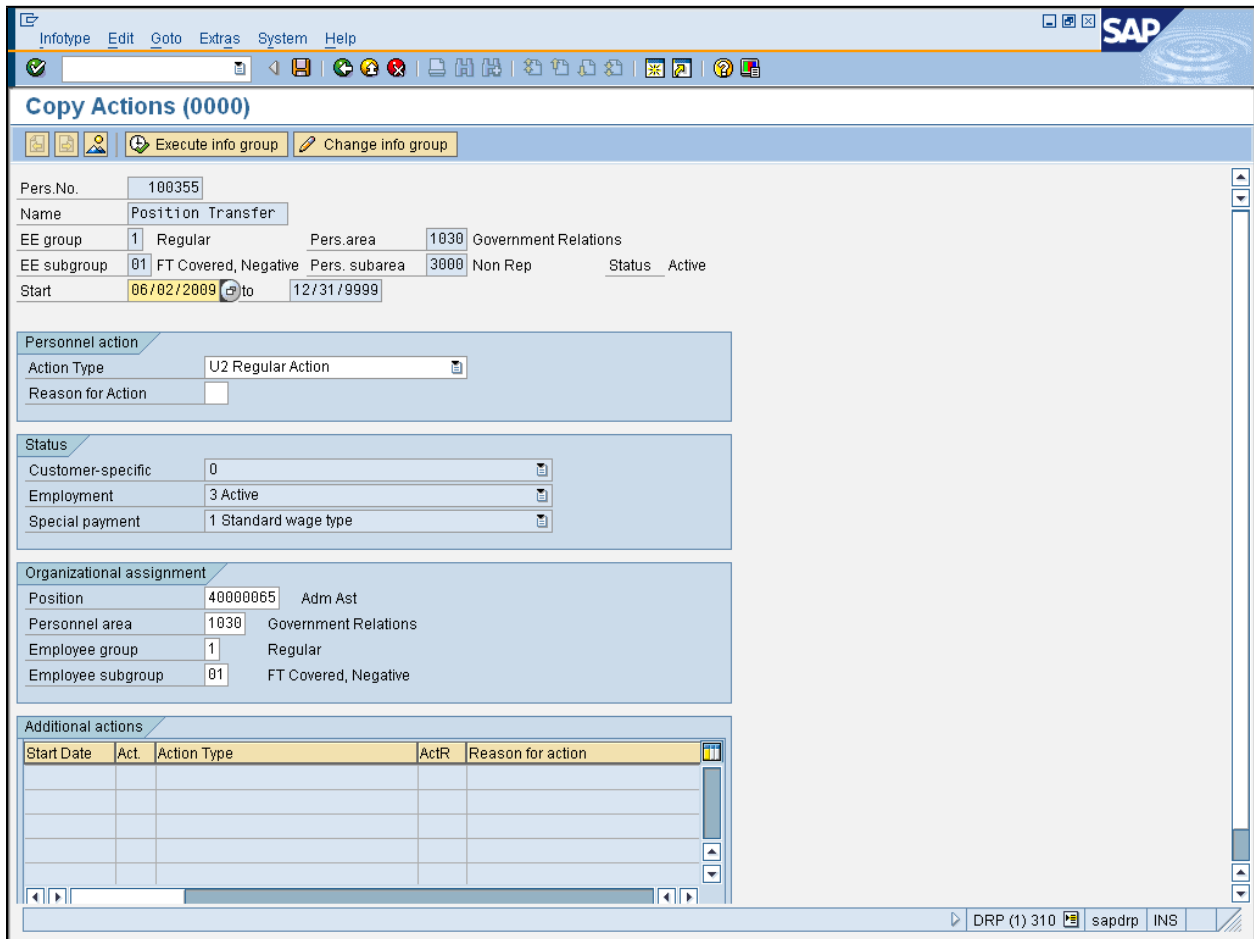
51. Click **Regular Action** record indicator . The row highlights.



Transfer Position to Different Organizational Unit (PQ13)

52. Click **Execute** button . The *Copy Actions (0000)* screen displays.

Copy Actions (0000)




The screenshot shows the SAP 'Copy Actions (0000)' screen. The top menu bar includes 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. The title bar shows 'SAP'. Below the menu is a toolbar with various icons. The main content area is divided into several sections:

- Execute info group** and **Change info group** buttons.
- Personnel data:** Pers.No. 100355, Name Position Transfer, EE group 1 Regular, Pers.area 1030 Government Relations, EE subgroup 01 FT Covered, Negative, Pers. subarea 3000 Non Rep, Status Active, Start 06/02/2009 to 12/31/9999.
- Personnel action:** Action Type U2 Regular Action, Reason for Action .
- Status:** Customer-specific 0, Employment 3 Active, Special payment 1 Standard wage type.
- Organizational assignment:** Position 40000065 Adm Ast, Personnel area 1030 Government Relations, Employee group 1 Regular, Employee subgroup 01 FT Covered, Negative.
- Additional actions table:**

Start Date	Act.	Action Type	ActR	Reason for action

The bottom status bar shows 'DRP (1) 310', 'sapdrp', and 'INS'.

53. Click **Reason for Action** field .

54. Click **Reason for Action** matchcode . The *Reason for Action (XXXX)* dialog box displays.



Transfer Position to Different Organizational Unit (PQ13)

Reason for Action (XXXX) YYYY Entries found

Reason for Action (1) 28 Entries found

Restrictions

Action Type: U2
Name of action type: Regular Action

Ac...	Name of reason for action
05	Promo-Exp Transfer-Waived
06	Promotion - Trainee to Journey
07	Reclass - Deep Class
08	Promotion - Redeployment
09	Promotion - Cert Attained
10	Premium Assignment
11	Lateral Transfer - Recruitment
12	Lat Trans - In Lieu of Layoff
13	Lateral Trans - Redeployment
14	Lat Trans - Expanded Transfer
15	Lat Trans-Exp Transfer-Waived
16	Lateral Transfer - Same Class
17	Lateral Transfer-Diff. Class
18	Demotion - Recruitment
19	Demotion - Voluntary
20	Demotion - In Lieu of Layoff
21	Demotion - Redeployment
22	Demotion - Involuntary
23	Demotion - Expanded Transfer
24	Demo-Exp Transfer-Waived
25	Demotion - Fiscal Emergency
26	Return During Probation
27	EE Chg of Position-Same Class
28	Position Transfer-Bureau Reorg

28 Entries found

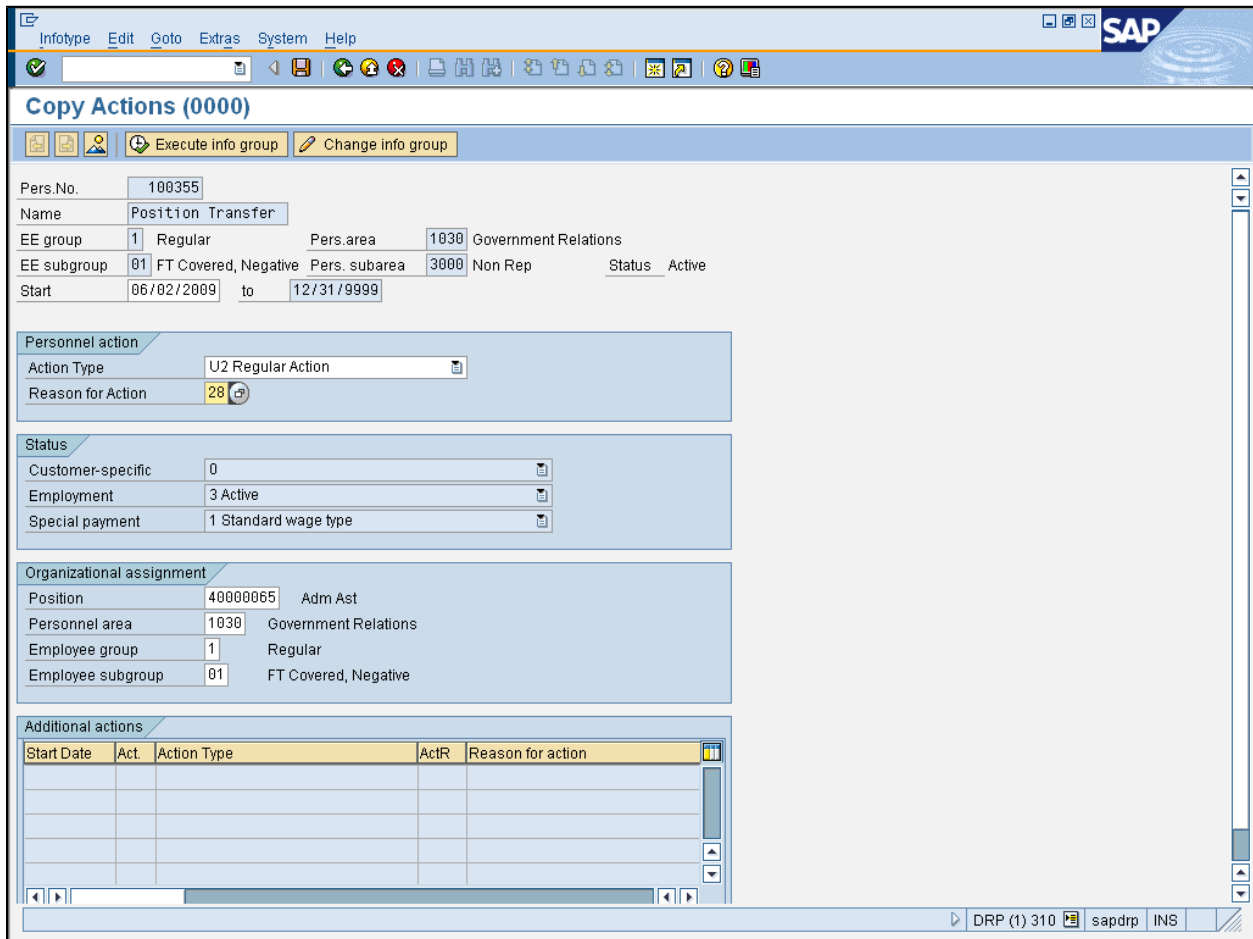
55. Select **Position Transfer-Bureau Reorg** list item **Position Transfer-Bureau Reorg**.



Transfer Position to Different Organizational Unit (PQ13)

56. Click **Enter (continue)** button .


Copy Actions (0000)



The screenshot shows the SAP 'Copy Actions (0000)' form. The 'Personnel action' section is expanded, showing 'Action Type' as 'U2 Regular Action' and 'Reason for Action' as '28'. The 'Organizational assignment' section shows 'Personnel area' as '1030' and 'Government Relations'. The 'Additional actions' table is empty.

Start Date	Act.	Action Type	ActR	Reason for action

57. Click **Personnel area** field .

58. Click **Personnel area** matchcode . The *Personnel Area (XXXX)* dialog box displays.



PQ13

Work Instruction

Transfer Position to Different Organizational Unit (PQ13)

Personnel Area (XXXX) YYYY Entries found

PA	Personnel Area Text	CoCd	CGrpg
1010	Environmental Services	COP1	10
1020	Fire and Rescue	COP1	10
1030	Government Relations	COP1	10
1040	Housing & Community	COP1	10
1050	Comm #1	COP1	10
1060	Comm #2	COP1	10
1070	Comm #3	COP1	10
1080	Comm #4	COP1	10
1090	Attorney	COP1	10
1100	City Auditor	COP1	10
1110	Sustainable Development	COP1	10
1120	Transportation	COP1	10
1130	Water	COP1	10
1140	Planning	COP1	10
1150	Police	COP1	10
1160	Parks	COP1	10
1170	Neighborhood Involvement	COP1	10
1180	Mayor	COP1	10
1190	Emergency Management	COP1	10
1200	Emergency Communications	COP1	10
1210	Development Services	COP1	10
1220	Cable	COP1	10
1230	FPDR	COP1	10
1240	OMF-Human Resources	COP1	10
1250	OMF-BTS	COP1	10
1260	OMF-Purchases	COP1	10
1270	OMF-Financial Services	COP1	10

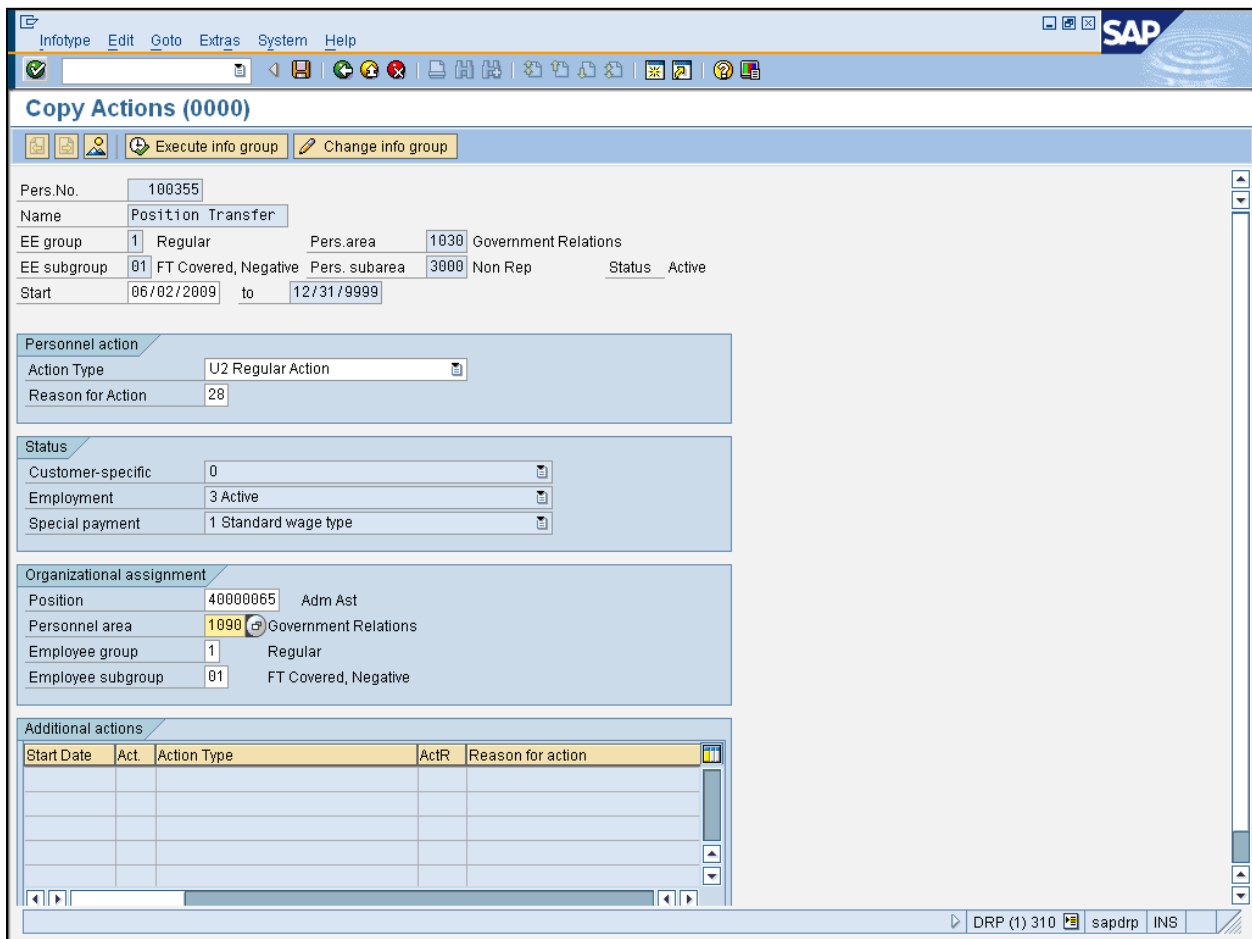
59. Select **Attorney** list item `Attorney` . The row highlights.



Transfer Position to Different Organizational Unit (PQ13)

60. Click **Enter (continue)** button .

Copy Actions (0000)




The screenshot shows the SAP 'Copy Actions (0000)' screen. The top menu bar includes 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. The main area contains several sections:

- Execute info group** and **Change info group** buttons.
- Pers.No.**: 100355
- Name**: Position Transfer
- EE group**: 1 Regular, **Pers.area**: 1030 Government Relations
- EE subgroup**: 01 FT Covered, Negative, **Pers. subarea**: 3000 Non Rep, **Status**: Active
- Start**: 06/02/2009 to 12/31/9999
- Personnel action**: Action Type U2 Regular Action, Reason for Action 28
- Status**: Customer-specific 0, Employment 3 Active, Special payment 1 Standard wage type
- Organizational assignment**: Position 40000065 Adm Ast, Personnel area 1090 Government Relations, Employee group 1 Regular, Employee subgroup 01 FT Covered, Negative
- Additional actions** table with columns: Start Date, Act, Action Type, ActR, Reason for action.


The bottom status bar shows 'DRP (1) 310', 'sapdrp', and 'INS'.

61. Click **Enter** button .

62. Click **Save** button .

 The system displays the message, "Save you entries".

63. Click **Enter** button . The *Create Organizational Assignment (0001)* screen displays.

 The system displays the message, "Record valid from XXXX to YYYY delimited at end".








Transfer Position to Different Organizational Unit (PQ13)

Create Organizational Assignment (0001)

The screenshot shows the SAP 'Create Organizational Assignment (0001)' screen. The interface includes a menu bar (Infotype, Edit, Goto, Extras, System, Help) and a toolbar with various icons. The main form area is divided into several sections:

- Org Structure:** Personnel No: 100355, Name: Position Transfer, EE group: 1 Regular, Pers.area: 1030 Government Relations, EE subgroup: 01 FT Covered, Negative, Pers. subarea: 3000 Non Rep, Stat: Active, Start: 06/02/2009 to 12/31/9999.
- Enterprise structure:** CoCode: COP1 City of Portland, Pers. area: 1090 Attorney, Subarea: 3000 Non Rep, Cost Ctr: ATAT000001 City Attorney, Bus. Area: AT00 Office of the City Attorney, Fund: [empty], Grant: [empty], Func. Area: [empty].
- Personnel structure:** EE group: 1 Regular, Payr.area: Z1 CoP Bi-Weekly, EE subgroup: 01 FT Covered, Negative, Contract: [empty].
- Organizational plan:** Percentage: 100.00, Position: 40000065 Adm Ast, Job key: 30000434 Adm Ast, Exempt: N, Org. Unit: 20000059 City Atty. An **Assignment** button is visible next to the Position field.
- Administrator:** Time: [empty], PayrAdmin: [empty].

At the bottom of the screen, a status bar shows 'Record created' and system information: DRP (1) 310, sapdrp, INS.

64. Click **Enter** button  to fill in record.
 The system displays the message, "Record created".
65. Click **Enter** button  to delete previous record.
 The system displays the message, "This entry deletes a record".
66. Click **Save** button  . The *Create Planned Working Time (0007)* screen displays.



Transfer Position to Different Organizational Unit (PQ13)



The system displays the message, "Save you entries".

Create Planned Working Time (0007)

67. Click **Work schedule rule** field .



The system displays the message, "Record created".

68. Click **Work schedule rule** matchcode  . The *Restrict Value Range (XXXX)* dialog box displays.



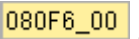

Transfer Position to Different Organizational Unit (PQ13)

Restrict Value Range (XXXX) YYYY Entries found

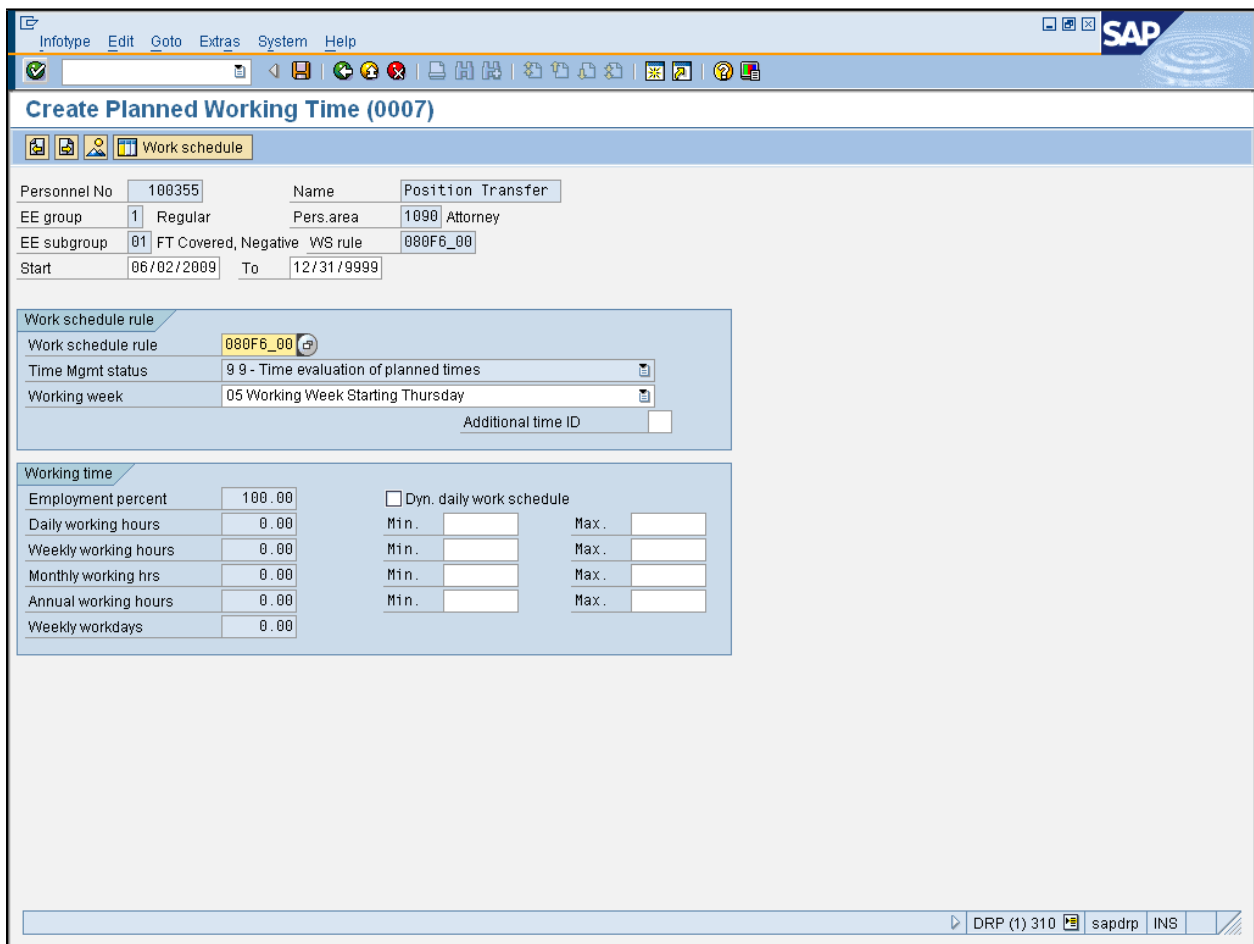
WS rule	Work schedule rule text	PWS	Start Date	End Date
080F6_00	MF 0530-1400	40F1	01/01/2007	12/31/9999
080F6_01	M10-1830,TH530-14,U13-213	40F2	01/01/2007	12/31/9999
080G0_01	MF 0600-1430	40G0	01/01/2007	12/31/9999
080G0_04	MF6-1430,TW16-243,H11-193	40G6	01/01/2007	12/31/9999
080G6_01	MF 0630-15:00	40G1	01/01/2007	12/31/9999
080H0_00	MF 0700-1530	40H0	01/01/2007	12/31/9999
080H0_01	MF 0700-1600	40H1	01/01/2007	12/31/9999
080H0_08	MH_700-1600, U_800-1430	40H0	01/01/2007	12/31/9999
080H6_01	MF 0730-1630	40H3	01/01/2007	12/31/9999
080H6_02	MH 0730-1700, F0730-1130	40HV	01/01/2007	12/31/9999
080I0_00	MF 0800-1630	40I0	01/01/2007	12/31/9999
080I0_01	MF 0800-1700	40I1	01/01/2007	12/31/9999
080I0_03	MH8-1700,TU8-1600,F8-1630	40I9	01/01/2007	12/31/9999
080I6_01	MF 0830-1700	40I2	01/01/2007	12/31/9999
080I6_02	MF 0830-1730	40I5	01/01/2007	12/31/9999
080J0_01	MF 0900-1730	40J3	01/01/2007	12/31/9999
080J0_03	MH9-18,T14-18,WV7-18	40J5	01/01/2007	12/31/9999
080J9T00	MF 0945-1800	40J7	01/01/2007	12/31/9999
080K0_01	MF 1000-1900	40K1	01/01/2007	12/31/9999
080O6_00	MF 1430-2300	40O1	01/01/2007	12/31/9999
872FA_00	MH 0550-1520	36F0	01/01/2007	12/31/9999
872I0_00	MH 0800-1730	36I0	01/01/2007	12/31/9999
872I0_01	TF 0800-1730	36I3	01/01/2007	12/31/9999
880G0_00	MH 0600-1630	40G2	01/01/2007	12/31/9999
880G0_02	MH 0630-1730	40G7	01/01/2007	12/31/9999
880H0_00	MH 0700-1730	40HD	01/01/2007	12/31/9999
880H6_00	MT HF 0730-1830	40HX	01/01/2007	12/31/9999
880I0_01	MH 0800-1830	40I6	01/01/2007	12/31/9999



Transfer Position to Different Organizational Unit (PQ13)

- 69. Select **080F6_00** list item  .
- 70. Click **Enter (continue)** button  .

Create Planned Working Time (0007)







The screenshot shows the SAP 'Create Planned Working Time (0007)' screen. The top menu bar includes 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. The main content area is titled 'Create Planned Working Time (0007)' and contains several input fields and sections:

- Personnel No:** 100355
- Name:** Position Transfer
- EE group:** 1 Regular
- Pers.area:** 1000 Attorney
- EE subgroup:** 01 FT Covered, Negative
- WS rule:** 080F6_00
- Start:** 06/02/2009
- To:** 12/31/9999

Below these fields are two main sections:

- Work schedule rule:** Includes a dropdown for 'Work schedule rule' (080F6_00), 'Time Mgmt status' (9 9 - Time evaluation of planned times), 'Working week' (05 Working Week Starting Thursday), and an 'Additional time ID' field.
- Working time:** Includes 'Employment percent' (100.00), 'Daily working hours' (0.00), 'Weekly working hours' (0.00), 'Monthly working hrs' (0.00), 'Annual working hours' (0.00), and 'Weekly workdays' (0.00). There is also a checkbox for 'Dyn. daily work schedule' and several 'Min.' and 'Max.' input fields.

The bottom status bar shows 'DRP (1) 310', 'sapdrp', 'INS', and a refresh icon.

- 71. Click **Enter** button  .
- 72. Click **Enter** button  .
 The system displays the message, "Attention: Please check Basic Pay infotype (0008)".
- 73. Click **Save** button  . The *Create Basic Pay (0008)* screen displays.



Transfer Position to Different Organizational Unit (PQ13)



The system displays the message, "Save you entries".

Create Basic Pay (0008)

The screenshot shows the SAP 'Create Basic Pay (0008)' form. The 'Personnel No' is 100355, 'Name' is Position Transfer, and 'Position' is Attorney. The 'EE group' is 1 Regular, 'Pers.area' is 1090, and 'EE subgroup' is 01 FT Covered, Negative. The start date is 06/02/2009 and the end date is 12/31/9999. The 'Subtype' is 0 Basic contract. The 'Salary' section shows 'Reason' checked, 'Capacity Util. Level' 100.00, 'PS type' 02 Nonrepresented, 'Work hours/period' 80.00 Bi-weekly, 'PS Area' NR NONREP, and 'Annual salary' field. A table below shows wage types with columns: Wg., Wage Type Long Text, O, Amount, Curr., I, A, Number/Unit, Unit. The first row is 0500 Regular Salary Pay with USD currency and I checked. At the bottom, a summary line shows IV 06/02/2009 - 12/31/9999 with 0.00 USD. A status bar at the bottom indicates 'Record created'.

74. Click **Reason** field .



The system displays the message, "Record created".

75. Click **Reason** matchcode . The Reason for Changing Master Data (XXXX) dialog box displays.



Transfer Position to Different Organizational Unit (PQ13)

Reason for Changing Master Data (XXXX) YYYY Entries found

Reason for Changing Master Data (1) 22 Entries found

Restrictions

Infotype: 0008

Re	Reason Text
00	Step Increase - Rep
01	Merit Increase - Non Rep
02	New Hire/Rehire
03	Promotion
04	Premium Assignment
05	Temporary/Limited Dur Assgn
06	End of Temp Assign
07	Status Change
08	Lateral
09	Demotion
10	Return from Leave of Absence
11	COLA (Cost of Living)
12	Special Assignment Pay
13	Movement on the Range
14	Labor Contract Change
15	Class/Comp Change
16	Step Increase - Cert Attained
17	Step Increase - Apprentice
18	Red Circle Adjustment
19	Position Change Only
20	Increase/Decrease Hours
99	Data Conversion

22 Entries found

76. Select **Position Change Only** list item **Position Change Only** . The row highlights.

77. Click **Enter (continue)** button  .



Transfer Position to Different Organizational Unit (PQ13)

Create Basic Pay (0008)

78. Click **Amount** field .



Check the **Level** for minimum and maximum pay scales.

79. As required, complete/review the following fields:

Field	R/O/C	Description
Amount	R	Figure within the pricing procedure that determines how the system calculates a condition value. Example: 1348.90



Transfer Position to Different Organizational Unit (PQ13)

80. Click **Save** button . The *Copy Date Specifications (0041)* screen displays.



The system displays the message, "Record valid from XXXX to YYYY delimited at end".

Copy Date Specifications (0041)

The screenshot shows the SAP 'Copy Date Specifications (0041)' screen. At the top, there is a title bar with the SAP logo and a toolbar. Below the title bar, the screen displays the following data:

Personnel No	100355	Name	Position Transfer
EE group	1 Regular	Pers.area	1090 Attorney
EE subgroup	01 FT Covered, Negative	Pers. subarea	3000 Non Rep Stat Active
Start	06/02/2009	to	12/31/9999

Below this data is a section titled 'Date Specifications (0041)' containing a table:

Date type	Date	Date type	Date
U1 Original Hire Date	05/01/2009	U1 City Service Date	05/01/2009
U2 Job Class Annv. Date	05/01/2009	U3 Vac Accrual Date	05/01/2009
U8 Bureau Start Date	05/01/2009		



At the bottom right of the screen, there is a status bar showing 'DRP (1) 310 sapdrp INS'.

81. As required, complete/review the following fields:

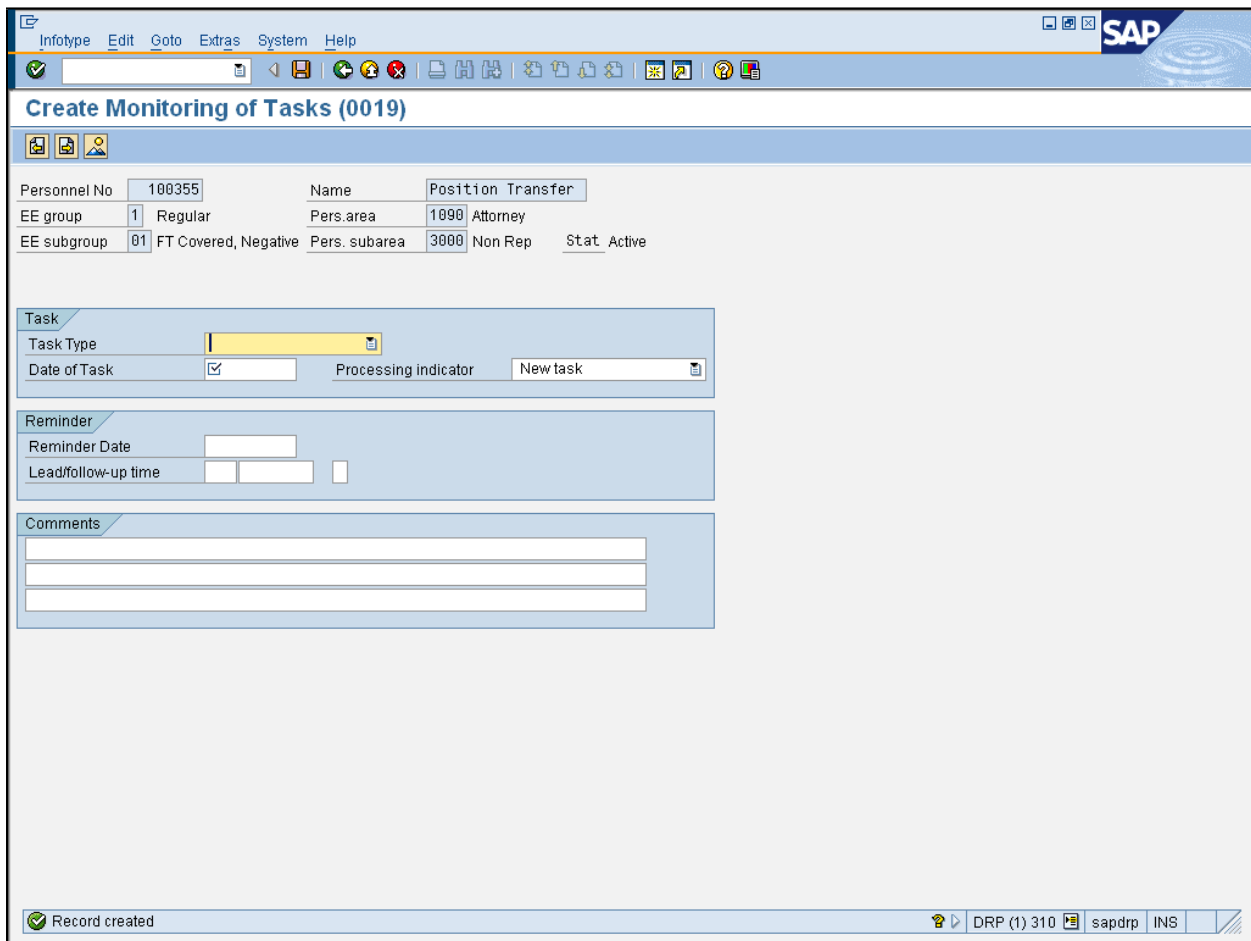
Field	R/O/C	Description
Bureau Start Date	R	The date the employee starts with the new bureau. Example: 060209



Transfer Position to Different Organizational Unit (PQ13)

- 82. Click **Enter** button  .
- 83. Click **Save** button  . The *Create Monitoring of Tasks (0019)* screen displays.
 The system displays the message, "Save you entries".

Create Monitoring of Tasks (0019)





The screenshot shows the SAP 'Create Monitoring of Tasks (0019)' screen. At the top, there is a menu bar with 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. Below the menu bar is a toolbar with various icons. The main area contains a form with the following fields:

Personnel No	100355	Name	Position Transfer
EE group	1 Regular	Pers.area	1090 Attorney
EE subgroup	01 FT Covered, Negative	Pers. subarea	3000 Non Rep Stat Active

Below the personnel data, there are sections for 'Task', 'Reminder', and 'Comments'. The 'Task' section includes 'Task Type' (a dropdown menu), 'Date of Task' (a date field), and 'Processing indicator' (a dropdown menu set to 'New task'). The 'Reminder' section includes 'Reminder Date' (a date field) and 'Lead/follow-up time' (a time field). The 'Comments' section has three empty text input fields.

At the bottom of the screen, a status bar shows a green checkmark and the message 'Record created'. On the right side of the status bar, there are icons for help, a search icon, and the text 'DRP (1) 310 sapdrp INS'.

- 84. Click **Next Record** button  . The *Personnel Actions* screen displays.
 The system displays the message, "Record created".



Transfer Position to Different Organizational Unit (PQ13)

Personnel Actions

HR Master Data Edit Goto Extras Utilities(M) Settings System Help

Personnel Actions

Personnel no. 100355

Name Position Transfer

EE group 1 Regular Pers. area 1030 Government Relations

EE subgroup 01 FT Covered, Negative Pers. subarea 3000 Non Rep Status Active

From

Action Type	Personn..	EE group	EE subg..
New Hire			
Change In Pay			
Temporary/Limited Dur Action			
Regular Action			
Status Change			
Ext of Temporary Appt			
End of Temp Assn/Retrn to Prev			
Leave of Absence - UnPaid			
Leave of Absence - Paid			
Return from Leave			
Layoff			
Separation			
Rehire			
Retirement			
Employee to WR Benefit Eligible			

DRP (1) 310 sapdrp INS

85. Click Exit button  .



PQ13

Work Instruction

Transfer Position to Different Organizational Unit (PQ13)

Result

You have successfully transferred a position to a new organizational unit and updated the employee's record accordingly.