



## Enter Personnel Action - New Hire (PA40)

### Purpose

Use this procedure to enter data for a new employee.

### Trigger

Perform this procedure when a new employee is hired.

### Prerequisites

Start Date

### Menu Path

Use the following menu path to begin this transaction:

N/A

### Transaction Code

PA40

### Helpful Hints

- R/O/C column in tables represents Required, Optional, or Conditional entry
- The Minimum and Maximum grade level amounts represent range for this position's pay (viewed using **Level** matchcode in the Basic Pay (0008) infotype)
- During the New Hire action, populate infotype 0009 Bank Details by either saving the default information presented in the infotype, this allows the employee to receive a check, or enter the direct deposit information if the employee has provided it to you. Forward the forms to Central Payroll for verification. For all future changes to bank details, send completed direct deposit forms provided by employees to Central Payroll at 106/1200/Central Payroll who make the appropriate changes
- During the New Hire action, populate infotype 210 FED and 210 OR with information provided by the employee's W-4 forms, enter information in the "filing status", "allowances" and "additional withholding fields". Forward these forms to Central Payroll for verification. For all future changes to withholdings, send completed W-4 forms provided by employees to Central Payroll at 106/1200/Central Payroll who make the appropriate changes
- For Police and Fire Bureau employees, please complete the Contract Field to indicate the taxability for employees in info type 0001 Organizational Assignment.
  - U-2 = The employee was sworn on or before 3/31/1986 then they are not taxable for Social Security or Medicare because FPD&R pays their retirement and any disability claims. They are also not subject to the Workers Comp Benefit fund which is a tax



**PA40**

**Work Instruction**

## **Enter Personnel Action - New Hire (PA40)**

- U-3 = The employee was sworn on or after 4/1/1986 they are not taxable for Social Security but are taxable for Medicare. They are also a part of PERS and Risk Workers Compensation (City). They are subject to the Workers Comp Benefit fund which is a tax based on productive hours. There is currently only one employee in this category. This category receives no type of benefits from FPD&R. Fire and Police have more employees that could fall into this category if they choose to put them here
- U-4 =The employee was sworn on or after 4/1/1986 they are not taxable for Social Security but are taxable for Medicare, yet they are also a part of PERS and FPD&R for disability claims only. They are not subject to the Workers Comp Benefit fund which is a tax based on productive hours



## Enter Personnel Action - New Hire (PA40)

### Procedure

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

### Personnel Actions

The screenshot shows the SAP 'Personnel Actions' screen. At the top, there is a menu bar with 'HR Master Data', 'Edit', 'Goto', 'Extras', 'Utilities(M)', 'Settings', 'System', and 'Help'. Below the menu bar is a toolbar with various icons. The main area contains a title bar 'Personnel Actions' and a search area with 'Personnel no.' and 'From' fields. A table titled 'Personnel Actions' is displayed, listing various action types with columns for 'Personn.', 'EE group', and 'EE subg.'. The table includes rows for 'New Hires', 'Change In Pay', 'Temporary Actions', 'Regular Actions', 'Status Changes', 'Ext of Temporary Appt', 'End of Temp Assn/Retrn to Prev', 'Leave of Absences - UnPaid', 'Leave of Absences - Paid', 'Return from Leave', 'Layoffs', 'Separations', 'Rehires', 'Retirement', and 'Employee to WR Benefit Eligible'. The 'New Hires' row is highlighted. At the bottom right, the status bar shows 'PA40', 'sapqr2', and 'INS'.

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

| Field | R/O/C | Description   |
|-------|-------|---|
| From  | R     | Beginning value to be entered when specifying a range.<br><b>Example:</b><br>072408 |

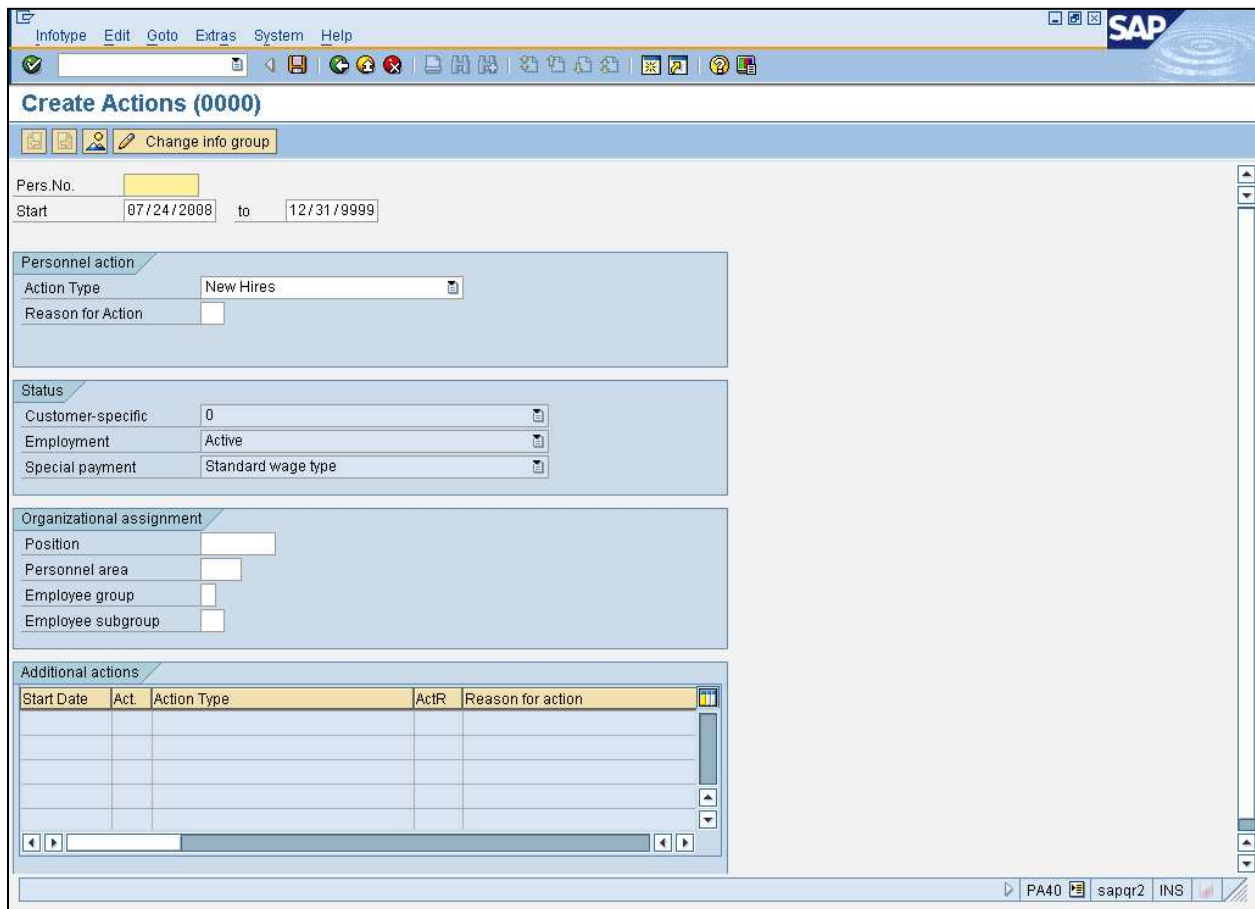
3. Select **New Hires** record indicator .



## Enter Personnel Action - New Hire (PA40)

4. Click **Execute** button  . The *Create Actions (0000)* screen displays.

### Create Actions (0000)



The screenshot shows the SAP 'Create Actions (0000)' screen. The interface includes a menu bar (Infotype, Edit, Goto, Extras, System, Help) and a toolbar. The main area is divided into several sections:

- Personnel action:** Action Type is set to 'New Hires'. Reason for Action is an empty field.
- Status:** Customer-specific is '0', Employment is 'Active', and Special payment is 'Standard wage type'.
- Organizational assignment:** Position, Personnel area, Employee group, and Employee subgroup are empty.
- Additional actions:** A table with columns: Start Date, Act, Action Type, ActR, Reason for action.

The status bar at the bottom shows 'PA40', 'sapq2', and 'INS'.


5. Click **Reason for Action** field  .
6. Click **Reason for Action** matchcode  . The *Reason for Action (XXXX)* dialog box displays.



### Enter Personnel Action - New Hire (PA40)

Reason for Action (XXXX) (YYYY) Entries found

| Ac... | Name of reason for action   |
|-------|-----------------------------|
| 01    | New Employee                |
| 02    | Prev Emp-Not Conv-Reinstate |
| 03    | Previous Employee-Not Conv  |

7. Select **01 New Employee** list item **01 New Employee** .
8. Click **Enter (continue)**  .



## Enter Personnel Action - New Hire (PA40)

### Create Actions (0000)


The screenshot displays the SAP 'Create Actions (0000)' interface. At the top, there is a menu bar with 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main area is divided into several sections:

- Personnel action:** Includes 'Action Type' set to 'New Hires' and 'Reason for Action' set to '01'.
- Status:** Includes 'Customer-specific' set to '0', 'Employment' set to 'Active', and 'Special payment' set to 'Standard wage type'.
- Organizational assignment:** Includes fields for 'Position', 'Personnel area', 'Employee group', and 'Employee subgroup'.
- Additional actions:** A table with columns for 'Start Date', 'Act', 'Action Type', 'ActR', and 'Reason for action'.

The status bar at the bottom right shows 'PA40', 'sapqr2', and 'INS'.

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

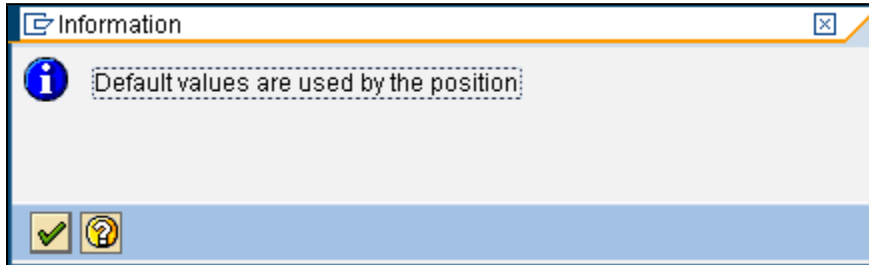
| Field    | R/O/C | Description  |
|----------|-------|--|
| Position | R     | Organizational objects held by employees and assigned to organizational units which may inherit characteristics from its organizational unit or the assigned job.<br><b>Example:</b><br>40000008 |

10. Click **Enter** button  . The *Information* screen displays.



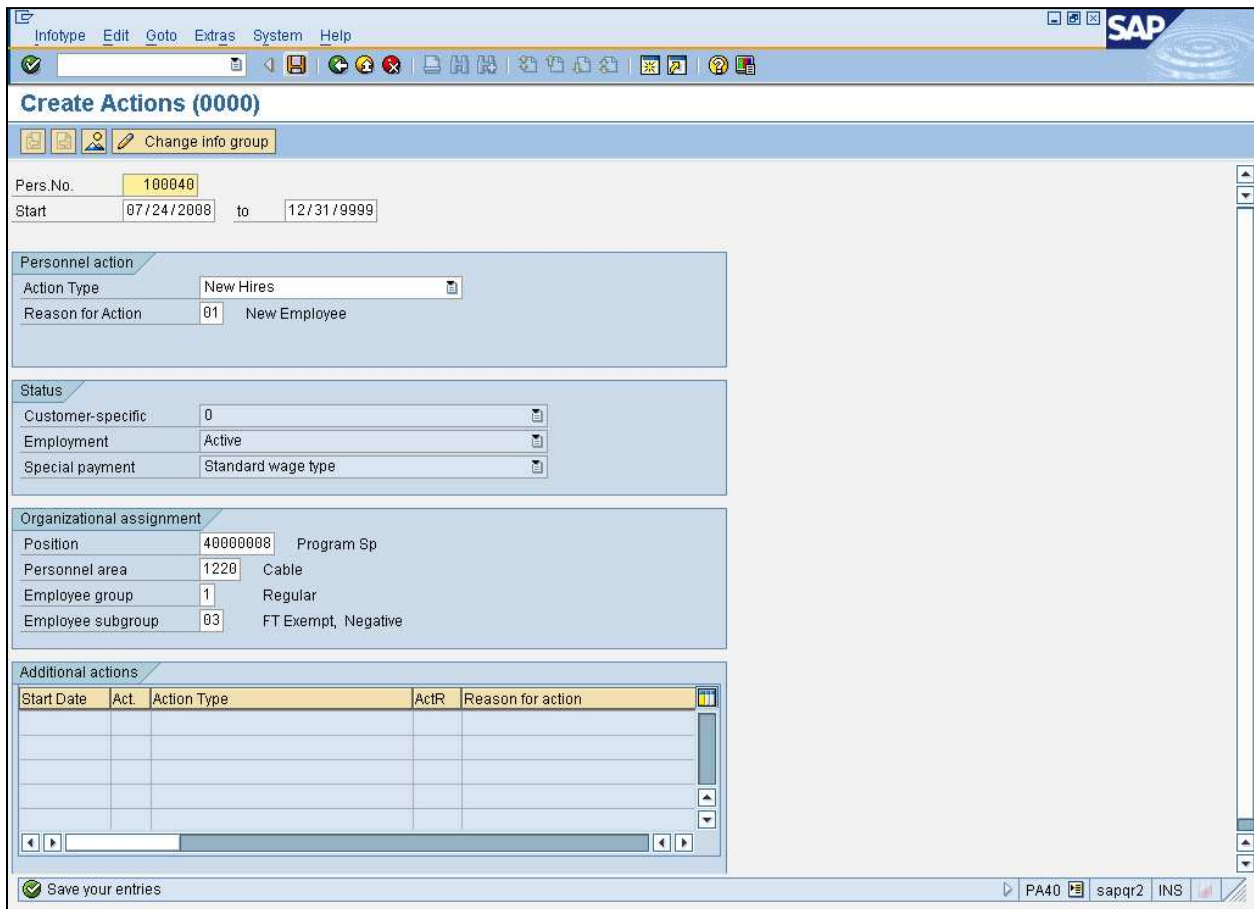
## Enter Personnel Action - New Hire (PA40)

### Information




- 11. Click **Enter (continue)** button


### Create Actions (0000)



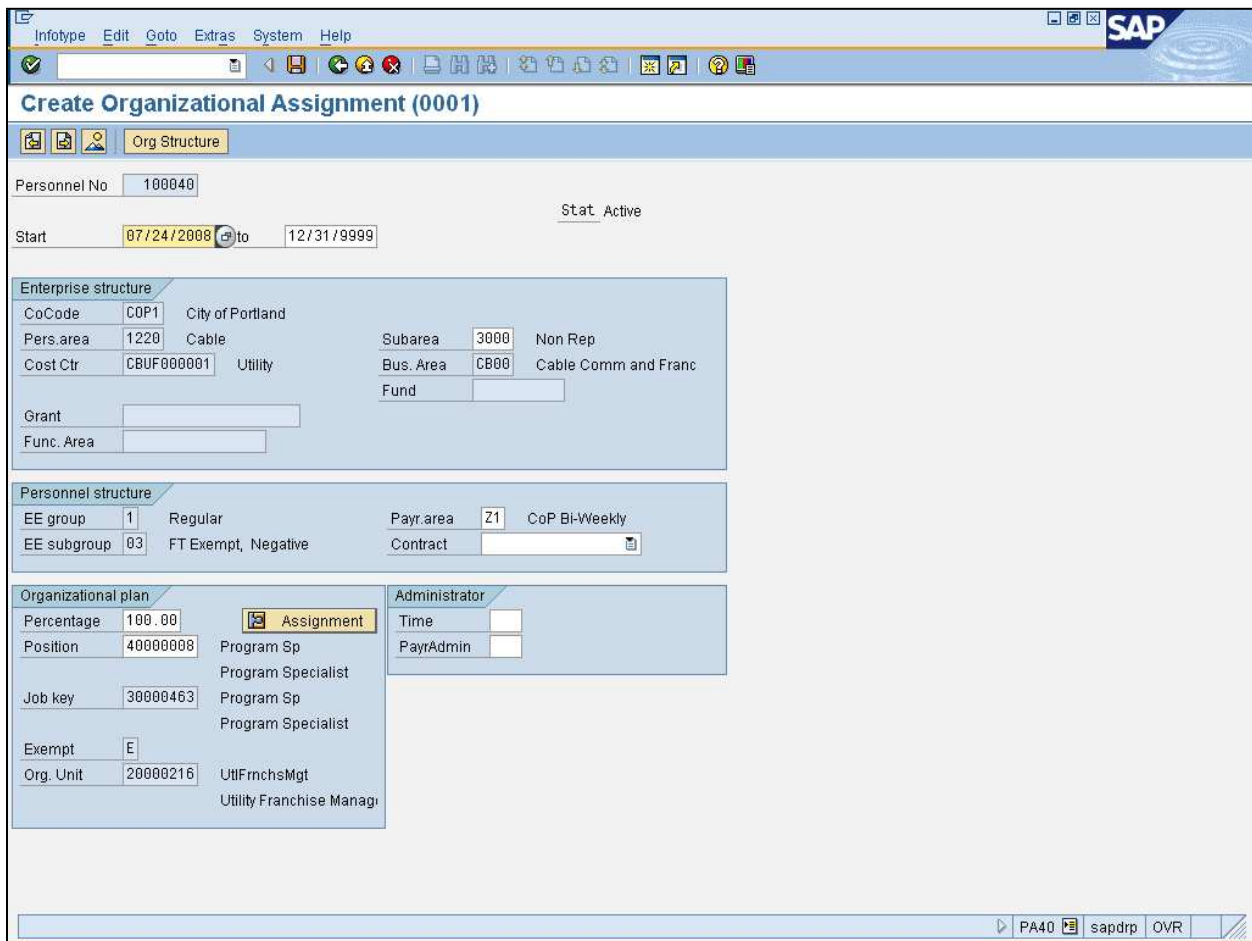


## Enter Personnel Action - New Hire (PA40)

12. Click **Save** button  . The *Create Organizational Assignments (0001)* screen displays.

 The system returns the message, "Save your entries".

### 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. The main area is divided into several sections:

- Personnel No:** 100040
- Stat:** Active
- Start:** 07/24/2008 to 12/31/9999
- Enterprise structure:**
  - CoCode: COP1 City of Portland
  - Pers.area: 1220 Cable
  - Cost Ctr: CBUF000001 Utility
  - Subarea: 3000 Non Rep
  - Bus. Area: CB00 Cable Comm and Franc
  - Fund: [empty]
  - Grant: [empty]
  - Func. Area: [empty]
- Personnel structure:**
  - EE group: 1 Regular
  - EE subgroup: 03 FT Exempt, Negative
  - Payr.area: Z1 CoP Bi-Weekly
  - Contract: [empty]
- Organizational plan:**
  - Percentage: 100.00
  - Position: 40000008 Program Sp
  - Job key: 30000463 Program Sp
  - Exempt: E
  - Org. Unit: 20000216 UtilFrnchsMgt Utility Franchise Managi
- Assignment:** [empty]
- Administrator:**
  - Time: [empty]
  - PayAdmin: [empty]

The status bar at the bottom right shows: PA40 | sapdrp | OVR

13. Click **Time** field  .

14. Click **Time** matchcode  . The *Administrator for Time Recording (XXXX)* dialog box displays.






### Enter Personnel Action - New Hire (PA40)

Administrator for Time Recording (XXXX) YYYY Entries found

15. Select **001 Justice, Carol S** list item **001 Justice, Carol S** .

 Only Timekeepers in your bureau are listed.

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





## Enter Personnel Action - New Hire (PA40)

### 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. The main area is divided into several sections: 'Org Structure' with fields for Personnel No (100040) and Stat (Active); 'Enterprise structure' with fields for CoCode (COP1), Pers.area (1220), Cost Ctr (CBUF000001), Subarea (3000), Bus. Area (CB00), and Fund; 'Personnel structure' with fields for EE group (1), EE subgroup (03), Payr.area (Z1), and Contract; 'Organizational plan' with fields for Percentage (100.00), Position (40000008), Job key (30000463), Exempt (E), and Org. Unit (20000216); and 'Administrator' with fields for Time (001) and PayrAdmin. A status bar at the bottom indicates 'Record created' and shows the transaction code PA40.

17. Click **Enter** button  . The *Organizational Assignment (0001)* screen updates.

 The system returns the message, "Record created".

 For Police and Fire Bureau employees, please complete the Contract Field to indicate the availability for employees.

18. Click **Save** button  . The *Delimit Vacancy* dialog box displays.

 The system returns the message, "Save your entries".



## Enter Personnel Action - New Hire (PA40)

### Delimit Vacancy

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

| Field      | R/O/C | Description                            |
|------------|-------|--|
| Delimit on | R     | End date.<br><b>Example:</b><br>072408 |

20. Click **Yes** button  .



## Enter Personnel Action - New Hire (PA40)

### Create Personal Data

21. Click **Last name** field  .

The system returns the message, "Record created".




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

| Field     | R/O/C | Description  |
|-----------|-------|--|
| Last name | R     | Surname; the name used to identify the individual.<br><b>Example:</b><br>Vandivier |



### Enter Personnel Action - New Hire (PA40)

| Field         | R/O/C | Description  |
|---------------|-------|--|
| First name    | R     | The name that precedes the surname; aides in identifying the individual.<br><b>Example:</b><br>Sharon  |
| Middle name   | R     | Middle name of employee.<br><b>Example:</b><br>P   |
| SSN           | R     | A number given to an individual by the U.S. government program financed by employer and employee payments that provide retirement insurance, disability benefits, and unemployment compensation.<br><b>Example:</b><br>999999940 |
| Date of Birth | R     | Year, month and day of birth.<br><b>Example:</b><br>10/01/1955   |

- 23. Click **Enter** button  . The *Create Personal Data* screen updates.
  - 24. Click **Save** button  . The *Create Communication(0105)* screen displays.
-  The system returns the message, "Save your entries".



## Enter Personnel Action - New Hire (PA40)

### Create Communication (0105)

The screenshot shows the SAP 'Create Communication (0105)' screen. The top menu bar includes 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. The SAP logo is in the top right corner. The main area contains the following data:


|              |                        |               |                  |         |                      |
|--------------|------------------------|---------------|------------------|---------|----------------------|
| Personnel No | 100040                 | Name          | Sharon Vandivier |         |                      |
| EE group     | 1 Regular              | Pers.area     | 1220             | Cable   |                      |
| EE subgroup  | 03 FT Exempt, Negative | Pers. subarea | 3000             | Non Rep | Stat Active Time 001 |
| Start        | 07/24/2008             | to            | 12/31/9999       |         |                      |

Below this is a section for 'Communication (0105)' with the following fields:


|           |            |                             |  |
|-----------|------------|-----------------------------|--|
| Type      | 0001       | System user name (SY-UNAME) |  |
| ID/number | SVandivier |                             |  |

At the bottom of the screen, a status bar shows a green checkmark icon and the text 'Record created'. On the right side of the status bar, there are icons for help, a search icon, and the text 'PA40', 'sapqr2', and 'INS'.

25. Click **Enter** button  .

 The system returns the message, "Record created".

26. Click **Save** button  . The *Create Addresses (0006)* screen displays.

 The system returns the message, "Save your entries".



## Enter Personnel Action - New Hire (PA40)

### Create Addresses (0006)

The screenshot shows the SAP 'Create Addresses (0006)' transaction. The top bar includes the SAP logo and a menu with 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. Below the title bar, there are icons for 'Foreign address', 'Print', and 'Help'. The main data area contains the following fields:

- Personnel No: 100040
- Name: Sharon Vandivier
- EE group: 1 Regular
- Pers.area: 1220 Cable
- EE subgroup: 03 FT Exempt, Negative
- Pers. subarea: 3000 Non Rep
- Stat: Active
- Time: 001
- Start: 07/24/2008 to 12/31/9999

The 'Address' section is expanded, showing:

- Address type: Permanent/Mailing address
- c/o: [empty]
- Address line 1: [empty] (checked)
- Address line 2: [empty]
- City/county: [empty] (checked)
- State/zip code: [empty] (checked)
- Country Key: USA
- Telephone Number: [empty]

The 'Communications' section is also expanded, showing four rows of 'Type', 'Number', and 'Exte' fields, all currently empty.

At the bottom of the window, a status bar indicates 'Record created' and shows the transaction code 'PA40' and user 'sapq2'.

27. Click **Address line 1** field

A close-up of the 'Address line 1' field, which is a text input box with a checkmark icon on the left side.

The system returns the message, "Record created".




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

| Field          | R/O/C | Description   |
|----------------|-------|---|
| Address line 1 | R     | Street address.<br><b>Example:</b><br>990 Strother Street |



### Enter Personnel Action - New Hire (PA40)

| Field    | R/O/C | Description  |
|----------|-------|--|
| City     | R     | A large and densely populated urban area; may include several independent administrative districts.<br><b>Example:</b><br>Portland |
| State    | R     | State (abbreviated).<br><b>Example:</b><br>OR  |
| zip code | R     | Zip code as part of address.<br><b>Example:</b><br>97204   |

- 29. Click **Enter** button  . The *Create Addresses (0006)* screen updates.
- 30. Click **Save** button  . The *Create Residence Tax Area (0207)* screen updates.  
 The system returns the message, "Save your entries".





## Enter Personnel Action - New Hire (PA40)

### Create Residence Tax Area (0207)

The screenshot shows the SAP 'Create Residence Tax Area (0207)' screen. The top menu bar includes 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. The SAP logo is in the top right corner. The main area contains the following data:

|              |                        |               |                  |
|--------------|------------------------|---------------|------------------|
| Personnel No | 100040                 | Name          | Sharon Vandivier |
| EE group     | 1 Regular              | Pers.area     | 1220 Cable       |
| EE subgroup  | 03 FT Exempt, Negative | Pers. subarea | 3000 Non Rep     |
| Stat         | Active                 | Time          | 001              |
| Start        | 07/24/2008             | to            | 12/31/9999       |

Below this is the 'Resident data' section with a table:


|          |      |                        |
|----------|------|------------------------|
| Tax area | OR01 | Tri-Med Trans District |
|----------|------|------------------------|

Next is the 'Tax Authorities in Area' section with a table:


| Tax... | Description            | T... | Description |
|--------|------------------------|------|-------------|
| FED    | Federal                | A    | Federal     |
| OR     | Oregon                 | B    | State       |
| OR01   | Tri-Met Trans District | F    | Other       |

At the bottom of the screen, a status bar shows 'Record created' on the left and 'PA40 | sapqr2 | INS' on the right.

31. Click **Enter** button  .

 The system returns the message, "Record created".

32. Click **Save** button  . The *Create Work Tax Area (0208)* screen displays.

 The system returns the message, "Save your entries".



## Enter Personnel Action - New Hire (PA40)

### Create Work Tax Area (0208)

The screenshot shows the SAP 'Create Work Tax Area (0208)' screen. The top bar includes the SAP logo and a menu with 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. Below the title bar, there are several icons for navigation and actions. The main data area contains the following fields:

|              |                        |               |                  |         |
|--------------|------------------------|---------------|------------------|---------|
| Personnel No | 100040                 | Name          | Sharon Vandivier |         |
| EE group     | 1 Regular              | Pers.area     | 1220             | Cable   |
| EE subgroup  | 03 FT Exempt, Negative | Pers. subarea | 3000             | Non Rep |
| Stat         | Active                 | Time          | 001              |         |
| Start        | 07/24/2008             | to            | 12/31/9999       |         |

Below this is the 'Work tax data' section:


|            |        |                        |
|------------|--------|------------------------|
| Tax Area   | OR01   | Tri-Med Trans District |
| Allocation | 100.00 | %                      |

At the bottom is the 'Tax Authorities in Area' table:


| Tax  | Description            | T | Description |
|------|------------------------|---|-------------|
| OR   | Oregon                 | B | State       |
| OR01 | Tri-Met Trans District | F | Other       |
|      |                        |   |             |
|      |                        |   |             |

The bottom status bar shows a green checkmark icon and the text 'Record created'. On the right side of the status bar, there are icons for help, a search icon, and the text 'PA40', 'sapqr2', and 'INS'.

33. Click **Save** button  .

 The system returns the message, "Record created".

34. Click **Save** button  . The *Create Unemployment State (0209)* screen displays.

 The system returns the message, "Save your entries".



## Enter Personnel Action - New Hire (PA40)

### Create Unemployment State (0209)

The screenshot shows the SAP 'Create Unemployment State (0209)' screen. The top bar includes the SAP logo and a menu with 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main area contains the following data:


|              |                        |               |                  |
|--------------|------------------------|---------------|------------------|
| Personnel No | 100040                 | Name          | Sharon Vandivier |
| EE group     | 1 Regular              | Pers.area     | 1220 Cable       |
| EE subgroup  | 03 FT Exempt, Negative | Pers. subarea | 3000 Non Rep     |
| Stat         | Active                 | Time          | 001              |
| Start        | 07/24/2008             | to            | 12/31/9999       |

Below this is a section for 'Unemployment data':


|               |    |        |
|---------------|----|--------|
| Tax authority | OR | Oregon |
| Worksite      |    |        |

At the bottom of the screen, a status bar shows 'Record created' on the left and 'PA40 sapqr2 INS' on the right.

35. Click **Enter** button  .

 The system returns the message, "Record created".

36. Click **Save** button  . The *Create Working Info W4/W5US (0210)* screen displays.

 The system returns the message, "Save your entries".



## Enter Personnel Action - New Hire (PA40)

### Create Withholding Info W4/W5 US (0210)

Personnel No 100040 Name Sharon Vandivier  
EE group 1 Regular Pers.area 1220 Cable  
EE subgroup 03 FT Exempt, Negative Pers. subarea 3000 Non Rep Stat Active Time 001  
Start 07/24/2008 to 12/31/9999

Status  
Tax authority FED Federal Tax level A Federal  
Filing Status

Exemptions  
Allowances   
Tax Exempt Indicator  IRS mandates

Withholding adjustments  
Add.withholding USD  Non-resident tax calculation  
Default formula 1 PCT MTHD-RES. U Alternative formula

W-5 filing status  
EIC status

Overrides (from Infotype 0234)

| From date | End Date | Supplemental met | Tax override | Em |
|-----------|----------|------------------|--------------|----|
|           |          |                  |              |    |
|           |          |                  |              |    |
|           |          |                  |              |    |

Record created

37. Click **Filing Status** field  .



The system returns the message, "Record created".



Populate infotype 210 FED and 210 OR with information on employee's W-4 forms, enter information in the **Filing status**, **Allowances** and **Additional withholding** fields. Forward these forms to Central Payroll for verification.

38. Click **Filing Status** matchcode . The *Filing status (XXXX)* screen displays.



## Enter Personnel Action - New Hire (PA40)

Filing status (XXXX) YYYY Entries found

Filing status (1) 6 Entries found

Restrictions

Tax Authority: FED

| F  | Long Text                                | Start Date | End Date   |
|----|--|------------|------------|
| 01 | Single                                   | 01/01/1980 | 12/31/9999 |
| 02 | Married                                  | 01/01/1980 | 12/31/9999 |
| 03 | Married claiming self plus dependents or | 01/01/1980 | 12/31/9999 |
| 04 | Married, both spouses working            | 01/01/1980 | 12/31/9999 |
| 05 | Married, one spouse working              | 01/01/1980 | 12/31/9999 |
| 06 | Head of household or family              | 01/01/1980 | 12/31/9999 |

6 Entries found



## Enter Personnel Action - New Hire (PA40)

39. Double-click **01 Single** list item 01 Single

### Create Withholding Info W4/W5 US (0210)

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


| Field      | R/O/C | Description   |
|------------|-------|---|
| Allowances | R     | Number of exemptions claimed by the employee.<br><b>Example:</b><br>1 |

41. Click **Enter** button


42. Click **Save** button . The screen updates.




## Enter Personnel Action - New Hire (PA40)

 The system returns the message, "Save your entries".

43. Click **Filing Status** field .

 The system returns the message, "Record created".

44. Click **Filing Status** matchcode  . The *Filing Status (XXXX)* dialog box displays.



### Enter Personnel Action - New Hire (PA40)

Filing status (XXXX) YYYY Entries found

Filing status (1) 6 Entries found

Restrictions

Tax Authority: OR

| F  | Long Text                                | Start Date | End Date   |
|----|--|------------|------------|
| 01 | Single                                   | 01/01/1980 | 12/31/9999 |
| 02 | Married                                  | 01/01/1980 | 12/31/9999 |
| 03 | Married claiming self plus dependents or | 01/01/1980 | 12/31/9999 |
| 04 | Married, both spouses working            | 01/01/1980 | 12/31/9999 |
| 05 | Married, one spouse working              | 01/01/1980 | 12/31/9999 |
| 06 | Head of household or family              | 01/01/1980 | 12/31/9999 |

6 Entries found





## Enter Personnel Action - New Hire (PA40)

45. Double-click **01 Single** list item  .

### Create Withholding Info W4/W5 US (0210)

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

| Field      | R/O/C | Description   |
|------------|-------|---|
| Allowances | R     | Number of exemptions claimed by the employee.<br><b>Example:</b><br>1 |

47. Click **Enter** button  .

48. Click **Save** button  . The *Create Planned Working Time (0007)* screen displays.



### Enter Personnel Action - New Hire (PA40)

The system returns the message, "Save your entries".

### Create Planned Working Time (0007)

The screenshot shows the SAP 'Create Planned Working Time (0007)' form. The 'Personnel No' field is 100040, and the 'Name' is Sharon Vandivier. The 'Work schedule rule' field is 80008. The 'Time Mgmt status' is 9 - Time evaluation of planned times. The 'Working week' is Working Week Starting Thursday. The 'Employment percent' is 100.00. The 'Daily working hours' is 0.00. The 'Weekly working hours' is 0.00. The 'Monthly working hrs' is 0.00. The 'Annual working hours' is 0.00. The 'Weekly workdays' is 0.00. The 'Dyn. daily work schedule' checkbox is unchecked. The 'Additional time ID' field is empty. The status bar at the bottom shows 'Record created'.

49. Click **Work schedule rule** field  .

The system returns the message, "Record created".

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



### Enter Personnel Action - New Hire (PA40)

Restrict Value Range (XXXX) YYYY Entries found

| WS rule  | Work schedule rule text   | PWS  | Start Date | End Date   |
|----------|---------------------------|------|------------|------------|
| 080G0_01 | MF 0600-1430              | 40G0 | 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 |
| 080H6_00 | MF 0730-1600              | 40H2 | 01/01/2007 | 12/31/9999 |
| 080H6_01 | MF 0730-1630              | 40H3 | 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_02 | MF 0800-1600              | 40I4 | 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_00 | MF 0900-1700              | 40J1 | 01/01/2007 | 12/31/9999 |
| 080J0_01 | MF 0900-1730              | 40J3 | 01/01/2007 | 12/31/9999 |
| 080J0_02 | MF 0900-1800              | 40J0 | 01/01/2007 | 12/31/9999 |
| 080J6_00 | MF 0930-1800              | 40J2 | 01/01/2007 | 12/31/9999 |
| 540I0_0A | MF 0800-1700, SU-U OFF    | 40I7 | 01/01/2007 | 12/31/9999 |
| 540I0_0B | SU-U OFF, M-F 0800-1700   | 40I7 | 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 |
| 880H0_00 | MH 0700-1730              | 40HD | 01/01/2007 | 12/31/9999 |
| 880H0_09 | TF 0700-1730              | 40H5 | 01/01/2007 | 12/31/9999 |
| 880I0_01 | MH 0800-1830              | 40I6 | 01/01/2007 | 12/31/9999 |
| 880N0_00 | UW 1300 -2300             | 40N0 | 01/01/2007 | 12/31/9999 |
| 880X0_00 | UW 2300 -3300             | 40X0 | 01/01/2007 | 12/31/9999 |
| 980G0_0A | MH 0600-1530 F0600-1430,O | 44G1 | 01/01/2007 | 12/31/9999 |
| 980G0_0B | MH 0600-1530 FO,0600-1530 | 44G1 | 01/01/2007 | 12/31/9999 |
| 980G6_0A | MH 0630-1600 F0630-1500,O | 44G0 | 01/01/2007 | 12/31/9999 |



### Enter Personnel Action - New Hire (PA40)

- 51. Double-click **080G0\_01 MF 0600-1430** list item **080G0\_01 MF 0600-1430** .

### 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 SAP logo is in the top right corner. The main title is 'Create Planned Working Time (0007)'. Below the title is a 'Work schedule' section with a toolbar. The main data area contains the following fields:

|              |                        |               |                  |
|--------------|------------------------|---------------|------------------|
| Personnel No | 100040                 | Name          | Sharon Vandivier |
| EE group     | 1 Regular              | Pers.area     | 1220 Cable       |
| EE subgroup  | 03 FT Exempt, Negative | Pers. subarea | 3000 Non Rep     |
| Status       | Active                 |               |                  |
| Start        | 07/24/2008             | To            | 12/31/9999       |

Below this is the 'Work schedule rule' section:

|                    |                                      |
|--------------------|--------------------------------------|
| Work schedule rule | 080G0_01                             |
| Time Mgmt status   | 9 - Time evaluation of planned times |
| Working week       | Working Week Starting Thursday       |
| Additional time ID |                                      |

Below that is the 'Working time' section:

|                      |        |   |
|----------------------|--------|---|
| Employment percent   | 100.00 | <input type="checkbox"/> Dyn. daily work schedule   |
| Daily working hours  | 0.00   | Min. <input type="text"/> Max. <input type="text"/> |
| Weekly working hours | 0.00   | Min. <input type="text"/> Max. <input type="text"/> |
| Monthly working hrs  | 0.00   | Min. <input type="text"/> Max. <input type="text"/> |
| Annual working hours | 0.00   | Min. <input type="text"/> Max. <input type="text"/> |
| Weekly workdays      | 0.00   |   |

The bottom status bar shows 'PA40', 'sapqr2', 'INS', and a refresh icon.

- 52. Click **Enter** button .
- 53. Click **Save** button . The *Create Basic Pay (0008)* screen displays.  
 The system returns the message, "Save your entries".



### Enter Personnel Action - New Hire (PA40)

#### Create Basic Pay (0008)

Personnel No 100040 Name Sharon Vandivier  
 EE group 1 Regular Pers.area 1220 Cable  
 EE subgroup 03 FT Exempt, Negative Pers. subarea 3000 Non Rep Stat Active Time 001  
 Start 07/24/2008 to 12/31/9999

Subtype 0 Basic contract

Reason  Capacity Util. Level 100.00  
 PS type 02 Nonrepresented Work hours/period 80.00 Bi-weekly  
 PS Area NR NONREP Next increase  
 PS group 6RD00050 Level 01 Annual salary USD

| Wage Type Long Text       | Amount | Curr | I | A                                   | Number/Unit | Unit |
|---------------------------|--------|------|---|-------------------------------------|-------------|------|
| 0500 Regular Salaried Pay |        | USD  | I | <input checked="" type="checkbox"/> |             |      |
|                           |        | USD  |   | <input type="checkbox"/>            |             |      |

IV 12/25/2008 - 12/31/9999 0.00 USD

Record created

54. Click Reason field  .

The system returns the message, "Record created".

55. Click Reason matchcode . The Reason for Changing Master Data (XXXX) screen displays.



### Enter Personnel Action - New Hire (PA40)

Reason for Changing Master Data (XXXX) YYYY Entries found

56. Double-click **02 New Hire/Rehire** list item **02 New Hire/Rehire** .



### Enter Personnel Action - New Hire (PA40)

#### Create Basic Pay (0008)

The screenshot shows the SAP 'Create Basic Pay (0008)' form. The 'Personnel No' is 100040 and the 'Name' is Sharon Vandivier. The 'EE group' is 1 Regular, 'Pers.area' is 1220 Cable, and 'EE subgroup' is 03 FT Exempt, Negative. The 'Start' date is 07/24/2008 and the 'to' date is 12/31/9999. The 'Subtype' is 0 Basic contract. The 'Salary' section shows 'Reason' 02, 'PS type' 02 Nonrepresented, 'PS Area' NR NONREP, and 'PS group' 6RD00050 Level 01. The 'Capacity Util. Level' is 100.00 and 'Work hours/period' is 80.00 Bi-weekly. A table below shows wage types, with '0500 Regular Salaried Pay' having an amount of 0.00 USD. The bottom of the form shows 'IV 12/25/2008 - 12/31/9999' with an amount of 0.00 USD.

57. Click **Amount** field  .



The Minimum and Maximum grade level amounts represent range for this position's pay (viewed using **Level** matchcode).





## Enter Personnel Action - New Hire (PA40)

### Change Basic Pay (0008)

58. 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.<br><b>Example:</b><br>2500.00 |


59. Click **Enter** button . The *Change Basic Pay (0008)* screen updates.

60. Click **Edit** from the main menu.



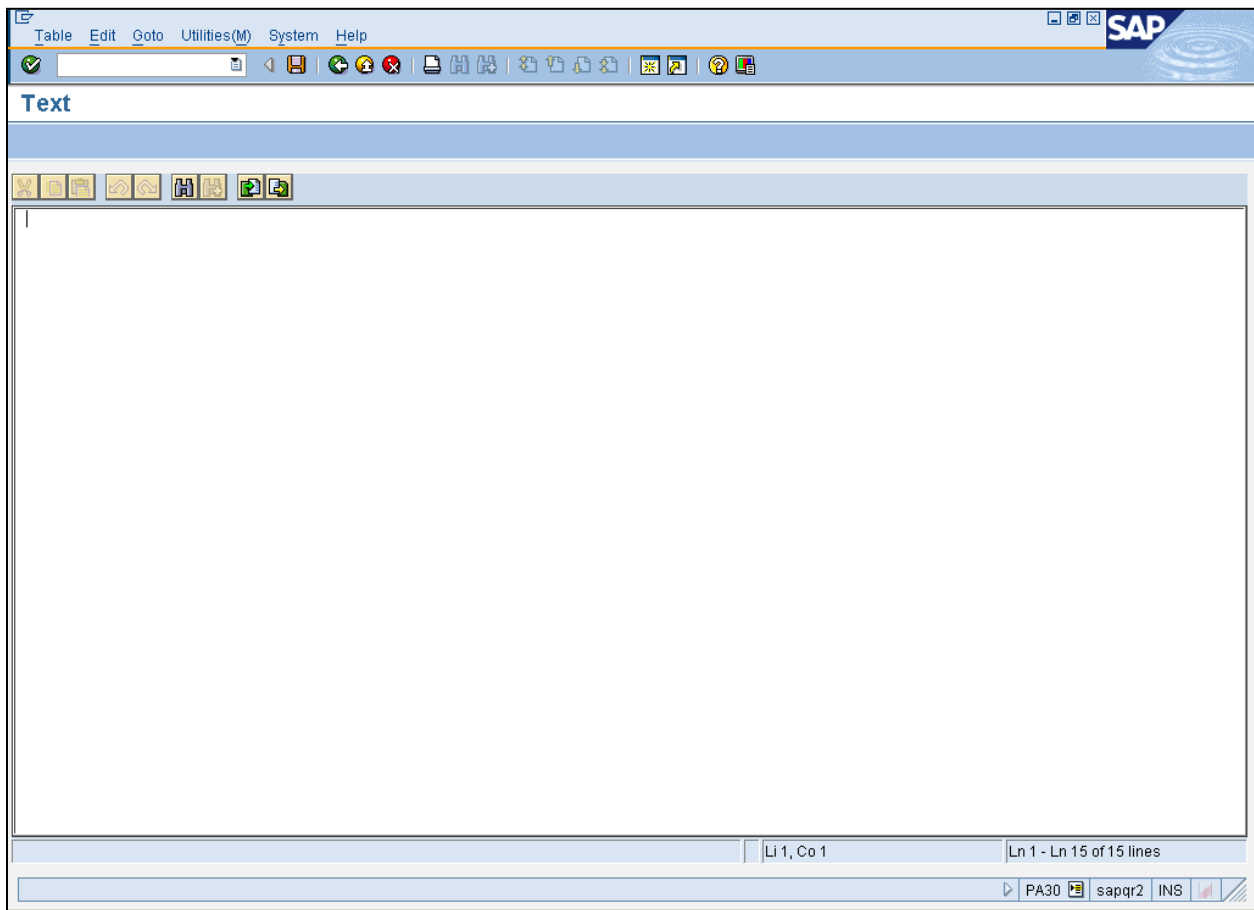


### Enter Personnel Action - New Hire (PA40)

 The system returns the message, "Save your entries".

- 61. Select **Maintain text F9** menu item 

#### Text



- 62. As required, complete/review the following fields:

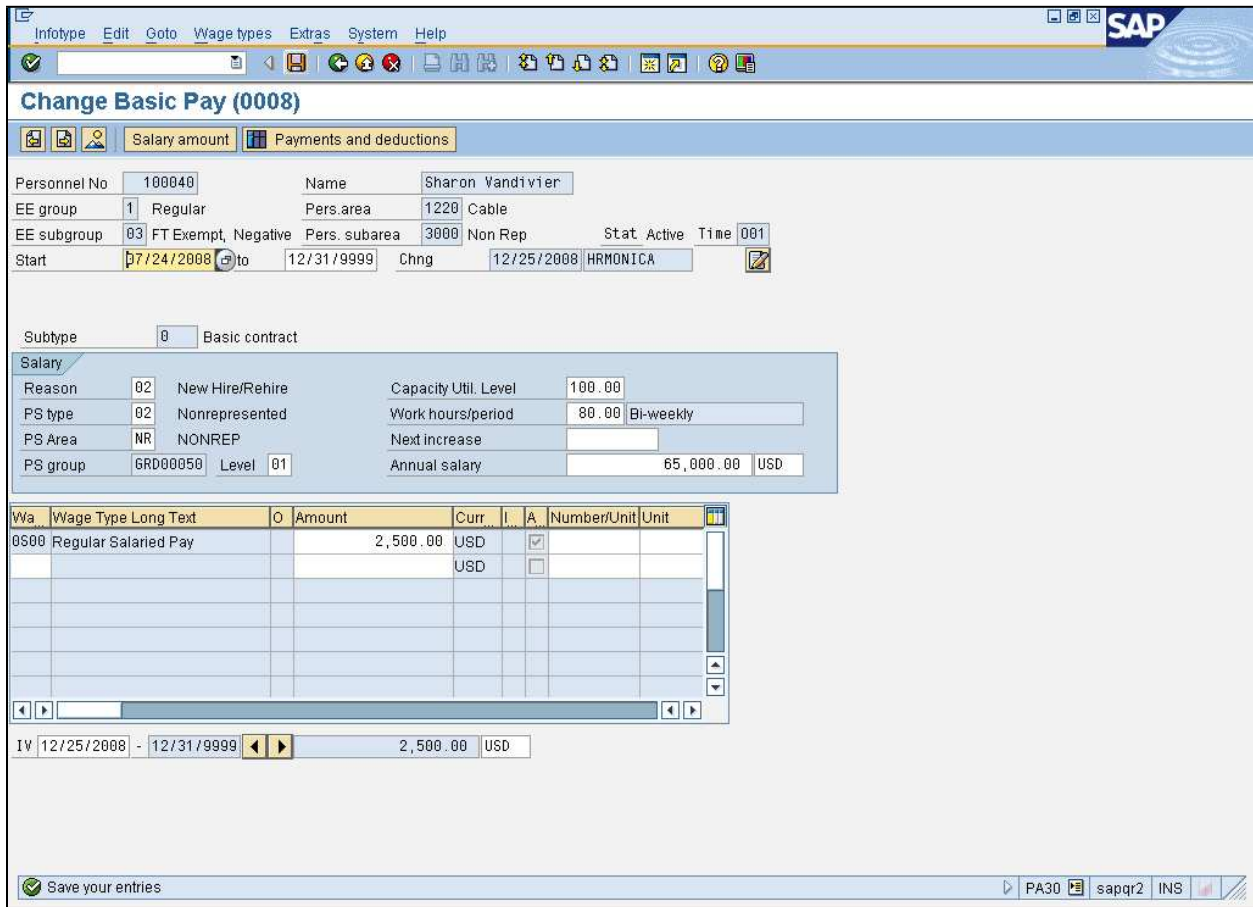
| Field | R/O/C | Description  |
|-------|-------|--|
| Text  | R     | Free text field used to provide additional information or an item description with reference to the current activity.<br><b>Example:</b><br>Employee approved at midpoint for hire. See paperwork. |



### Enter Personnel Action - New Hire (PA40)

63. Click **Save** button  . The *Create Basic Pay (0008)* screen displays.

#### Create Basic Pay (0008)



The screenshot shows the SAP 'Change Basic Pay (0008)' screen. The top menu bar includes 'Infotype', 'Edit', 'Goto', 'Wage types', 'Extras', 'System', and 'Help'. The title bar shows 'SAP'. Below the title bar, there are tabs for 'Salary amount' and 'Payments and deductions'. The main form contains the following data:

Personnel No: 100040, Name: Sharon Vandivier  
 EE group: 1 Regular, Pers.area: 1220 Cable  
 EE subgroup: 03 FT Exempt, Negative, Pers. subarea: 3000 Non Rep, Stat Active Time: 001  
 Start: 07/24/2008 to 12/31/9999, Chng: 12/25/2008 HRMONICA

Subtype: 0 Basic contract

**Salary**

Reason: 02 New Hire/Rehire, Capacity Util. Level: 100.00  
 PS type: 02 Nonrepresented, Work hours/period: 80.00 Bi-weekly  
 PS Area: NR NONREP, Next increase:   
 PS group: 6RD00050 Level: 01, Annual salary: 65,000.00 USD

| Wa   | Wage Type Long Text  | O | Amount   | Curr | I | A                                   | Number/Unit | Unit |
|------|----------------------|---|----------|------|---|-------------------------------------|-------------|------|
| 0500 | Regular Salaried Pay |   | 2,500.00 | USD  |   | <input checked="" type="checkbox"/> |             |      |
|      |                      |   |          | USD  |   | <input type="checkbox"/>            |             |      |

At the bottom, there is a summary row: IV | 12/25/2008 - 12/31/9999 | 2,500.00 USD

The bottom status bar shows 'Save your entries' and the transaction code 'PA30'.

64. Click **Save** button  . The *Create Bank Details (0009)* screen displays.



The system returns the message, "Save your entries".



This icon indicates a note is present on this infotype to review.



## Enter Personnel Action - New Hire (PA40)

### Create Bank Details (0009)

The screenshot shows the SAP 'Create Bank Details (0009)' screen. The top menu bar includes 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. The SAP logo is in the top right corner. The main area contains the following data:


|              |                        |               |                  |
|--------------|------------------------|---------------|------------------|
| Personnel No | 100040                 | Name          | Sharon Vandivier |
| EE group     | 1 Regular              | Pers.area     | 1220 Cable       |
| EE subgroup  | 03 FT Exempt, Negative | Pers. subarea | 3000 Non Rep     |
| Stat         | Active                 | Time          | 001              |
| Start        | 07/24/2008             | to            | 12/31/9999       |


Below this is the 'Bank details' section with the following fields:

|                   |                          |
|-------------------|--------------------------|
| Bank details type | Main bank                |
| Payee             | Sharon Vandivier         |
| Postal Code/City  | 97204 Portland           |
| Bank Country      | USA                      |
| Bank Key          |                          |
| Bank Account      |                          |
| Bank control key  | <input type="checkbox"/> |
| Payment method    | H Payroll Check          |
| Purpose           |                          |
| Payment currency  | USD                      |


At the bottom left, a message box says 'Record created'. At the bottom right, the status bar shows 'PA40', 'sapq2', and 'INS'.

65. Click **Enter** button  .

 The system returns the message, "Record created".

 Populate by either saving the default information presented in the infotype, or enter the direct deposit information. Forward the forms to Central Payroll for verification.

66. Click **Save** button  . The *Change Date Specifications (0041)* screen displays.

 The system returns the message, "Save your entries".



## Enter Personnel Action - New Hire (PA40)

### Change Date Specifications (0041)

The screenshot shows the SAP 'Change Date Specifications (0041)' screen. At the top, there is a menu bar with 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main area contains the following data:


|              |                        |               |                  |         |                      |
|--------------|------------------------|---------------|------------------|---------|----------------------|
| Personnel No | 100040                 | Name          | Sharon Vandivier |         |                      |
| EE group     | 1 Regular              | Pers.area     | 1220             | Cable   |                      |
| EE subgroup  | 03 FT Exempt, Negative | Pers. subarea | 3000             | Non Rep | Stat Active Time 001 |
| Start        | 07/24/2008             | to            | 12/31/9999       | Chng    | 12/25/2008 HRMONICA  |

| Date Specifications (0041) |            |                      |            |
|----------------------------|------------|----------------------|------------|
| Date type                  | Date       | Date type            | Date       |
| 01 Original Hire Date      | 07/24/2008 | U1 City Service Date | 07/24/2008 |
| U2 Job Class Anrv. Date    | 07/24/2008 | U3 Vac Accrual Date  | 07/24/2008 |
| U8 Bureau Start Date       | 07/24/2008 |                      |            |
|                            |            |                      |            |
|                            |            |                      |            |
|                            |            |                      |            |

At the bottom of the screen, a status bar shows 'Record created' on the left and 'PA40 sapq2 INS' on the right.

67. Click **Enter** button  .

 The system returns the message, "Record created".

68. Click **Save**  . The *Create Additional Personal Data (0077)* screen displays.



## Enter Personnel Action - New Hire (PA40)

### Create Additional Personal Data (0077)

69. Click **Ethnicity(New)** combo box

70. Select **Not Hispanic/Latino** list item

71. Select **Asian** check box  Asian

72. Select **Non-veteran** check box  Non-veteran

The system returns the message, "Save your entries".


73. Click **Enter** button . The *Create Additional Personal Data (0077)* screen updates.


74. Click **Save** button . The *Create Monitoring of Tasks (0019)* screen displays.




## Enter Personnel Action - New Hire (PA40)

### Create Monitoring of Tasks (0019)

75. Click **Task Type** combo box  .

 The system returns the message, "Record created".




76. Select **End of Probation** list item  .

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

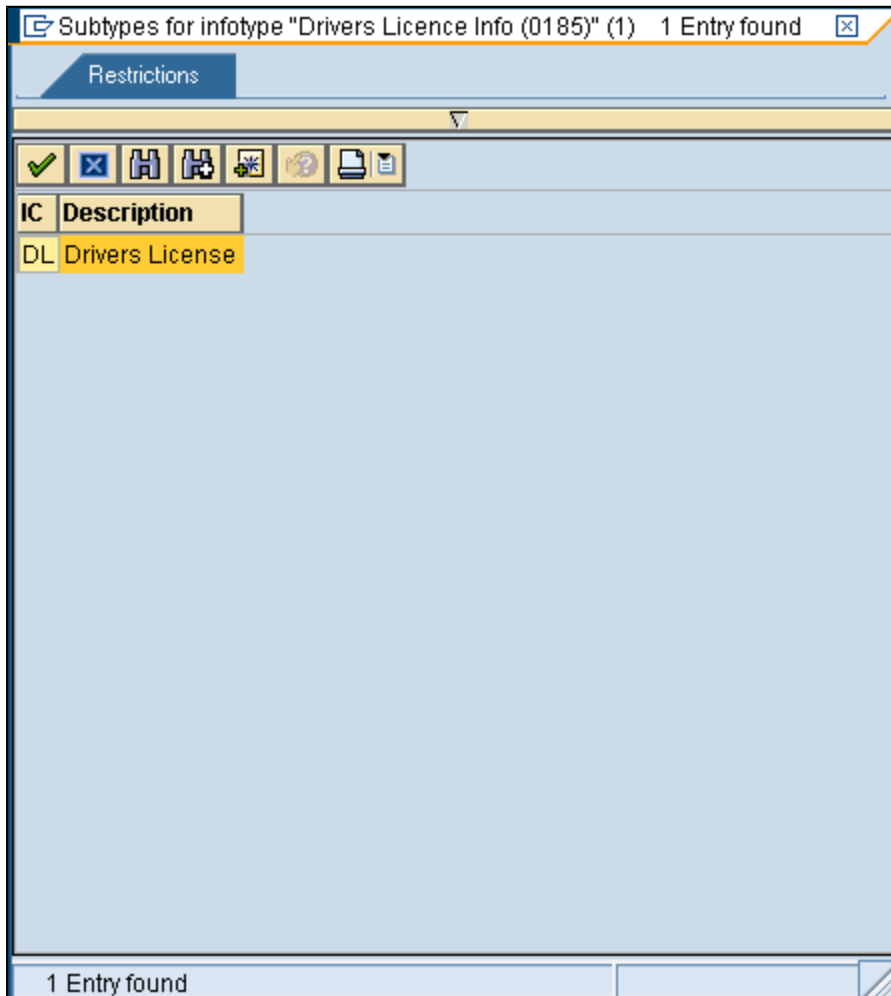
| Field        | R/O/C | Description  |
|--------------|-------|--|
| Date of Task | R     | Task type effective date.<br><b>Example:</b><br>042409 |



### Enter Personnel Action - New Hire (PA40)

- 78. Click **Enter** button  . The *Create Monitoring of Tasks (0019)* screen updates.
- 79. Click **Save** button  . The *Subtypes for infotype "Drivers Licence Info (0185)" (XXXX)* dialog box displays.
  -  The system returns the message, "Save your entries".

Subtypes for infotype "Drivers Licence Info (XXXX)" (YYYY) ZZZZ  
Entry found



- 80. Double-click **DL Drivers License** list item  .



## Enter Personnel Action - New Hire (PA40)

### Create Drivers Licence Info (0185)

81. Click **ID number** field  .

The system returns the message, "Record created".

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

| Field     | R/O/C | Description  |
|-----------|-------|--|
| ID number | R     | This field stores the identification/document number provided by the employee to establish personal identity.<br><b>Example:</b><br>99874313 |






### Enter Personnel Action - New Hire (PA40)

| Field          | R/O/C | Description   |
|----------------|-------|---|
| Valid to       | R     | Ending date when specifying a range of dates.<br><b>Example:</b><br>07/24/2010          |
| Place of issue | R     | The state, city or other location where the object was issued.<br><b>Example:</b><br>OR |

83. Click **Enter** button  .

84. Click **Save** button  . The *Create Objects on Loan (0040)* screen displays.

 The system returns the message, "Save your entries".




## Enter Personnel Action - New Hire (PA40)

### Create Objects on Loan (0040)

85. Click **Object on loan** field  .



The system returns the message, "Record created".

86. Click **Object on loan** matchcode  . The *Object on loan (XXXX)* dialog box displays.



## Enter Personnel Action - New Hire (PA40)

Object on loan (XXXX) YYYY Entries found

Personnel No 100040 Name Sharon Vandivier  
EE group 1 Regular Pers.area 1220 Cable  
EE subgroup 03 FT Exempt, Negative Pers. subarea 3000 Non Rep Stat Active Time 001  
Start 07/24/2008 to 12/31/9999

Objects on Loan (0040) Object on loan (1) 15 Entries found

| STyp | Name                |
|------|---------------------|
| 01   | Key(s)              |
| 02   | Clothing            |
| 03   | Books               |
| 04   | Tool(s)/Equipment   |
| 05   | Access/ID           |
| 06   | Cell Phone          |
| 07   | Pager               |
| 9001 | PCARD               |
| 9002 | Satellite phone     |
| 9003 | Scanner             |
| 9004 | Blackberry/TREO     |
| 9005 | Laptop Computer     |
| 9006 | PDA                 |
| 9007 | Phone Card          |
| 9008 | Radio/Walkie Talkie |

87. Double-click **06 Cell Phone** list item **06 Cell Phone** .




## Enter Personnel Action - New Hire (PA40)

### Create Objects on Loan (0040)

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

| Field  | R/O/C | Description  |
|--------|-------|--|
| Number | R     | Unique identifier assigned to a notification, work order, or a customer/vendor profile ID.<br><b>Example:</b><br>1 |

89. Click **unit** field  .

90. Click **unit** matchcode  . The *Unit of time/meas. (XXXX)* dialog box displays.



## Enter Personnel Action - New Hire (PA40)

Unit of time/meas. (XXXX) YYYY Entry found

A screenshot of a software application window. The title bar reads "Unit of time/meas. (1) 1 Entry found". Below the title bar is a tab labeled "Restrictions". A toolbar contains icons for a checkmark, a close button, a home button, a refresh button, a search button, a print button, and a document icon. Below the toolbar is a list with two items: "Unit" and "Pieces". The "Pieces" item is highlighted with a yellow background. At the bottom of the window, a status bar displays "1 Entry found".

91. Double-click **Pieces** list item **Pieces** . The *Create Objects on Loan (0040)* page updates.



## Enter Personnel Action - New Hire (PA40)

### Create Objects on Loan (0040)

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


| Field           | R/O/C | Description   |
|-----------------|-------|---|
| Loan object no. | R     | A unique, user-defined number representing the object on loan.<br><b>Example:</b><br>124567 |
| Line 1          | R     | <b>Example:</b><br>Motorola   |




## Enter Personnel Action - New Hire (PA40)

93. Click **Enter** button  . The *Create Objects on loan (0040)* screen updates.

94. Click **Save** button  .

 The system returns the message, "Save your entries".

 The system returns the message, "Record created".



**PA40**

**Work Instruction**

## **Enter Personnel Action - New Hire (PA40)**

### **Result**

You have entered data for a new employee.