



## Enter Personnel Action - Over Under Latfill: Temp Appt. (PA40)

### Purpose

Use this procedure to enter an employee into an over, under, or lateralfill position.

### Trigger

Perform this procedure when an employee is over, under or laterally filling a position that is different from the work being carried out.

### Prerequisites

- Employee, position, and job exist
- All paperwork submitted to the OM Position Administrator
- OM Position Administrator has entered the B017 relationship

### 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.
- This work instruction and simulation shows two transactions: **PA20** and **PA40**.
  - **PA20** - Display B017 relationship in Organizational Assignment (0001) infotype
  - **PA40** - Enter Temporary Appointment action after B017 relationship is created
- Upon creating the B017 relationship, SAP creates a new Personnel Administration Organizational Assignment (0001) infotype that indicates the position and job the employee holds no longer match
- In PA20, the new infotype 0001 record shows that the position and job no longer match. In this example, the employee is working at a higher level than the position (overfilling)
- In this example the employee is being temporarily assigned, select the action fitting of the situation
- When running the action in PA40, do **NOT** save the Organizational Assignment (0001) infotype record. The new IT0001 record exists with the appropriate position/job assignments from the creation of the B017 relationship. Please refer to PA20 portion of simulation
- Select a scale level that provides the employee the appropriate amount of pay increase. For new grades, enter the appropriate amount in the "Amount" field



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### Procedure

1. Start the transaction using the menu path or transaction code. The *Maintain Job* screen displays.

### Display HR Master Data

HR master data Edit Goto Extras Utilities(M) Settings System Help

Display HR Master Data

Personnel no. 123456

Name Relationship B017 Over f111

EE group 1 Regular Pers.area 1130 Water

EE subgroup 01 FT Covered, Negative Pers.subarea 3150 DCTU-AFSCME Status Active



Basic Personal Data Addtl. Personal Data Payroll Data Addtl. Payroll Data

Infotype text	E	Period
Actions (0000)	<input type="checkbox"/>	<input checked="" type="radio"/> Period
Organizational Assignment (0001)	<input checked="" type="checkbox"/>	From <input type="text"/> To <input type="text"/>
Personal Data (0002)	<input checked="" type="checkbox"/>	<input type="radio"/> Today <input type="radio"/> Curr.week
Addresses (0006)	<input checked="" type="checkbox"/>	<input type="radio"/> All <input type="radio"/> Current month
Planned Working Time (0007)	<input checked="" type="checkbox"/>	<input type="radio"/> From curr.date <input type="radio"/> Last week
Basic Pay (0008)	<input checked="" type="checkbox"/>	<input type="radio"/> To Current Date <input type="radio"/> Last month
Date Specifications (0041)	<input checked="" type="checkbox"/>	<input type="radio"/> Current Period <input type="radio"/> Current Year
Communication (0105)	<input checked="" type="checkbox"/>	<input type="button" value="Choose"/>
Seniority (9001)	<input type="checkbox"/>	

Direct selection

Infotype  STy

QR2 (2) 800 sapqr2 OVR

2. Select **Organizational Assignment (0001)** record indicator . The row highlights.  
 To check that the Over/Under/Lateralfill B017 relationship was entered, use **PA20** before executing the action.
3. Click **Overview** button . The *Overview Organizational Assignment (0001)* screen displays.



### Enter Personnel Action - Over Under Latfill: Temp Appt. (PA40)


#### Overview Organizational Assignment (0001)

Start Date	Co.	PA	EEGrp	ESgrp	Cost Center	Cost center	Org. Unit	Position	Job key
06/02/2009	COP11130	1	01	01	WACS000007	Billing	Billing	Cus Ac Sp I	Cus Ac
05/01/2009	COP11130	1	01	01	WACS000007	Billing	Billing	Cus Ac Sp I	Cus Ac

Entry 1 of 2

QR2 (2) 800 sapqr2 OVR

4. Select **Start Date** record indicator  .

 Select the most recent record.

5. Click **Details** button  . The *Display Organizational Assignment (0001)* screen displays.



## Enter Personnel Action - Over Under Latfill: Temp Appt. (PA40)

### Display Organizational Assignment (0001)

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

- Org Structure:** Personnel No: 123456, Name: Relationship B017 Over fill, EE group: 1 Regular, Pers.area: 1130 Water, EE subgroup: 01 FT Covered, Negative, Pers. subarea: 3150 DCTU-AFSCM Stat Active, Start: 06/02/2009 to 12/31/9999, Chng: 06/02/2009 HRMONICA.
- Enterprise structure:** CoCode: COP1 City of Portland, Pers.area: 1130 Water, Subarea: 3150 DCTU-AFSCME, Cost Ctr: WACS000007 Billing, Bus. Area: WA00 Bureau of Water Works, Fund: 602000 Water, Grant: NOT-RELEVANT NOT-RELEVANT, Func. Area: PUCSC66000000BW Cust Svs General Support.
- Personnel structure:** EE group: 1 Regular, Payr.area: Z1 CoP Bi-Weekly, EE subgroup: 01 FT Covered, Negative, Contract: [icon].
- Organizational plan:** Percentage: 100.00, Position: 40001192 Cus Ac Sp I, Job key: 30000018 Cus Ac Sp II, Exempt: N, Org. Unit: 20001832 Billing, Customer Service-Billin.
- Administrator:** Time: [checkbox], PayrAdmin: [checkbox].

At the bottom, a status bar indicates 'Data hidden by screen modifications' and shows system information: QR2 (2) 800, sapqr2, OVR.

6. Click **Back** button  . The *Overview Organizational Assignment (0001)* screen displays.



The system displays the message, "Data hidden by screen modifications".



The new infotype 0001 shows that the position and job no longer match, which means the B017 relationship has been entered.



## Enter Personnel Action - Over Under Latfill: Temp Appt. (PA40)

### Overview Organizational Assignment (0001)

Start Date	Co.	PA	EEGrp	ESgrp	Cost Center	Cost center	Org. Unit	Position	Job key
06/02/2009	COP11130	1	01	01	WACS000007	Billing	Billing	Cus Ac Sp I	Cus Ac
05/01/2009	COP11130	1	01	01	WACS000007	Billing	Billing	Cus Ac Sp I	Cus Ac

7. Click **Command** field



If the relationship is entered, then enter the appropriate action for the employee using **PA40**.

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

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



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#### Overview Organizational Assignment (0001)

The screenshot shows the SAP 'Overview Organizational Assignment (0001)' 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 a form with the following fields:

- Personnel No: 123456
- Name: Relationship B017 Over fill
- EE group: 1 Regular
- Pers.area: 1130 Water
- EE subgroup: 01 FT Covered, Negative
- Pers. subarea: 3150 DCTU-AFSCM Stat Active
- Selection: 01/01/1800 to 12/31/9999

Below the form is a table with the following columns: Start Date, Co., PA, EEGrp, ESgrp, Cost Center, Cost center, Org. Unit, Position, and Job key. The table contains two rows of data:

Start Date	Co.	PA	EEGrp	ESgrp	Cost Center	Cost center	Org. Unit	Position	Job key
06/02/2009	COP11130	1	01	01	WACS000007	Billing	Billing	Cus Ac Sp I	Cus Ac
05/01/2009	COP11130	1	01	01	WACS000007	Billing	Billing	Cus Ac Sp I	Cus Ac

At the bottom of the screen, there is a status bar with 'Entry 1 of 2' and a footer with 'QR2 (2) 800 sapqr2 OVR'.

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



## Enter Personnel Action - Over Under Latfill: Temp Appt. (PA40)

### Personnel Actions

Personnel no.

Name

EE group  Regular Pers.area  Water

EE subgroup  FT Covered, Negative Pers.subarea  DCTU-AFSCME 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			

10. Click **From** field



The action date and the creation date of the B017 relationship should match.

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

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



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- 12. Select **Temporary/Limited Dur Action** record indicator  . The row highlights.
- 13. Click **Execute** button . The *Copy Actions (0000)* screen displays.

#### Copy Actions (0000)

The screenshot shows the SAP 'Copy Actions (0000)' 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 content area is titled 'Copy Actions (0000)' and contains several sections:

- Personnel action:** Action Type is 'U1 Temporary/Limited Dur Action'. Reason for Action is empty.
- Status:** Customer-specific is '0', Employment is '3 Active', and Special payment is '1 Standard wage type'.
- Organizational assignment:** Position is '40001192 Cus Ac Sp I', Personnel area is '1130 Water', Employee group is '1 Regular', and Employee subgroup is '01 FT Covered, Negative'.
- Additional actions:** A table with columns: Start Date, Act., Action Type, ActR, Reason for action.

At the bottom right of the screen, there is a status bar showing 'QR2 (2) 800', 'sapqr2', and 'OVR'.

- 14. Click **Reason for Action** field  .
- 15. Click **Reason for Action** matchcode . The *Reason for Action (XXXX)* dialog box displays.





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Reason for Action (XXXX) YYYY Entries found

Reason for Action (2) 6 Entries found

Restrictions

Action Type: U1  
Name of action type: Temporary/Limited Dur Action

Ac...	Name of reason for action
01	Temporary Appt - Promotion
02	Temporary Appt - Demotion
03	Temporary Appt - Lateral
04	Limited Dur Appt - Promotion
05	Limited Dur Appt - Demotion
06	Limited Dur Appt - Lateral

6 Entries found

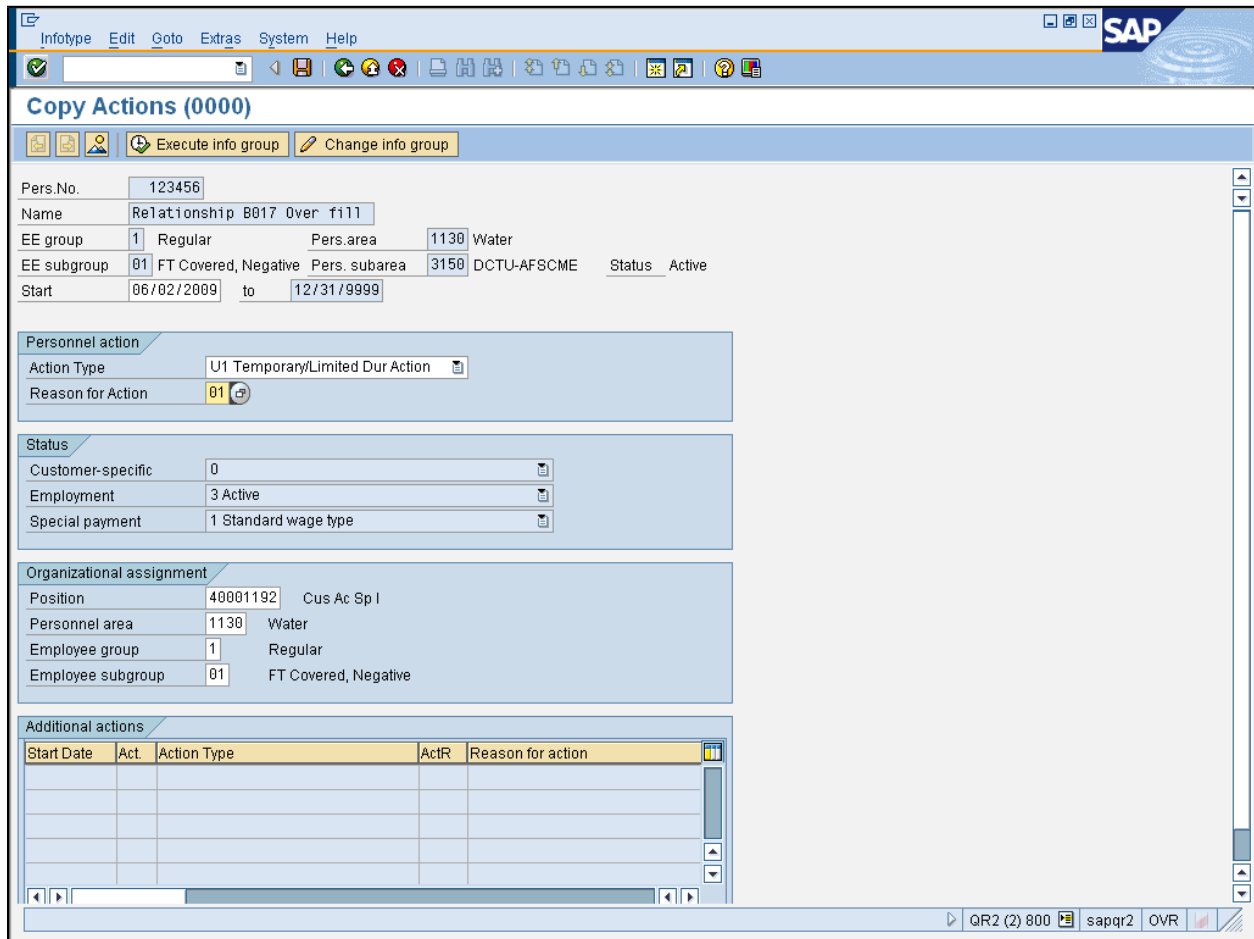
16. Select **01 Temporary Appt - Promotion** list item **01 Temporary Appt - Promotion** .



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- 17. Click **Copy** 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'. Below the menu is a toolbar with various icons. The main area is titled 'Copy Actions (0000)' and contains several sections:

- Execute info group** and **Change info group** buttons.
- Pers.No.**: 123456
- Name**: Relationship B017 Over f111
- EE group**: 1 Regular, **Pers.area**: 1130 Water
- EE subgroup**: 01 FT Covered, Negative, **Pers. subarea**: 3150 DCTU-AFSCME, **Status**: Active
- Start**: 06/02/2009 to 12/31/9999
- Personnel action**:
  - Action Type**: U1 Temporary/Limited Dur Action
  - Reason for Action**: 01
- Status**:
  - Customer-specific**: 0
  - Employment**: 3 Active
  - Special payment**: 1 Standard wage type
- Organizational assignment**:
  - Position**: 40001192 Cus Ac Sp I
  - Personnel area**: 1130 Water
  - Employee group**: 1 Regular
  - Employee subgroup**: 01 FT Covered, Negative
- Additional actions**: A table with columns: Start Date, Act., Action Type, ActR, Reason for action.

- 18. Click **Enter** button  to validate entries.
- 19. Click **Save** button  . The *Create Organizational Assignment (0001)* screen displays.  
 The system displays the message, "Save your entries".




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#### Create Organizational Assignment (0001)

20. Click **Enter** button  to validate the change. The screen updates.

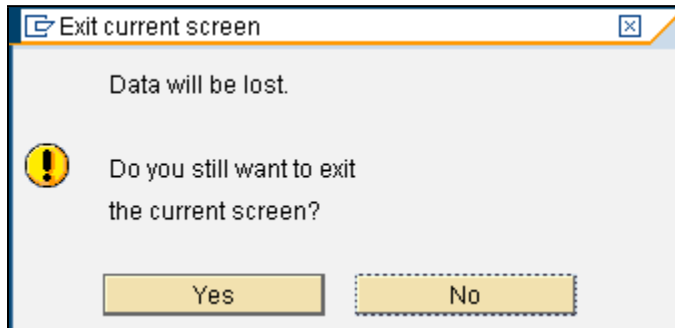
21. Click **Save** button . The *Exit current screen* dialog box displays.

 The system displays the message, "Record created".



## Enter Personnel Action - Over Under Latfill: Temp Appt. (PA40)

### Exit current screen



22. Click **Yes** button . The *Create Planned Working Time (0007)* screen displays.




## Enter Personnel Action - Over Under Latfill: Temp Appt. (PA40)

### Create Planned Working Time (0007)

The screenshot shows the SAP 'Create Planned Working Time (0007)' form. The top bar includes the SAP logo and navigation icons. The main form area is divided into several sections:

- Personnel Data:** Personnel No: 123456, Name: Relationship 0017 Over fill, EE group: 1 Regular, Pers.area: 1130 Water, EE subgroup: 01 FT Covered, Negativ C. WS rule: 00060\_01, Billing, Start: 06/02/2009, To: 12/31/9999.
- Work schedule rule:** Work schedule rule: 80D08, Time Mgmt status: 9 9 - Time evaluation of planned times, Working week: 05 Working Week Starting Thursday, Additional time ID: (empty).
- Working time:** Employment percent: 100.00, Daily working hours: 0.00, Weekly working hours: 0.00, Monthly working hrs: 0.00, Annual working hours: 0.00, Weekly workdays: 0.00. There is also a checkbox for 'Dyn. daily work schedule' and several empty 'Min.' and 'Max.' input fields.

The bottom status bar shows 'QR2 (2) 800 sapqr2 OVR'.

23. Click **Work schedule rule** field  .
24. Click **Work schedule rule** matchcode  . The *Restrict Value Range* dialog box displays.





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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
080H0T05	MT, FU 0700-1515	40HJ	01/01/2007	12/31/9999
080H0T06	SW 0700-1515	40HK	01/01/2007	12/31/9999
080H3_00	MF 0715-1545	40HM	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
080H6_02	MH 0730-1700, F0730-1130	40HV	01/01/2007	12/31/9999
080H9T00	TF 0745-1600	41HG	01/01/2007	12/31/9999
080H9T01	HM 0745-1600	40HZ	01/01/2007	12/31/9999
080H9T02	SW 0745-1600	41H0	01/01/2007	12/31/9999
080H9T03	UH 0745-1600	41H1	01/01/2007	12/31/9999
080H9T04	WU 0745-1600	41H5	01/01/2007	12/31/9999
080H9T05	MF 0745-1600	41H6	01/01/2007	12/31/9999
080H9T06	SW 0745-1600	41H7	01/01/2007	12/31/9999
080H9T07	TS 0745-1600	41H9	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
080I0T04	MF 0800-1615	40IC	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_02	MF 0900-1800	40J0	01/01/2007	12/31/9999
080K0_00	MF 1000-1830	40K0	01/01/2007	12/31/9999
080K0_01	MF 1000-1900	40K1	01/01/2007	12/31/9999
080K0_02	UH 1000-1830	40K3	01/01/2007	12/31/9999



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- 25. Select **080G0\_01** list item  .
- 26. Click **Copy** button  .

### Create Planned Working Time (0007)

- 27. Click **Enter** button  .
- 28. Click **Enter** button  to validate.  
 The system displays the message, "Attention: Please check Basic Pay infotype (0008)".
- 29. Click **Save** button  . The *Create Basic Pay (0008)* screen displays.



### Enter Personnel Action - Over Under Latfill: Temp Appt. (PA40)

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

### Create Basic Pay (0008)

The screenshot shows the SAP 'Create Basic Pay (0008)' transaction. The 'Pay scale' section is expanded, showing the following fields and values:

Reason	<input checked="" type="checkbox"/>	Capacity Util. Level	100.00
PS type	01 Represented	Work hours/period	80.00 Bi-weekly
PS Area	DT DCTU	Next increase	
PS group	SCL02255 Level EN	Annual salary	38,750.40 USD

Below the 'Pay scale' section is a table with columns: Wg., Wage Type Long Text, O, Amount, Curr., I, A, Number/Unit, Unit. The first row shows: 0500 Regular Salary Pay, 1,490.40 USD, I, . Below the table is a summary line: IV 06/02/2009 - 06/30/2009 1,490.40 USD.

30. Click **Reason** field  .

The system displays the message, "Record created".

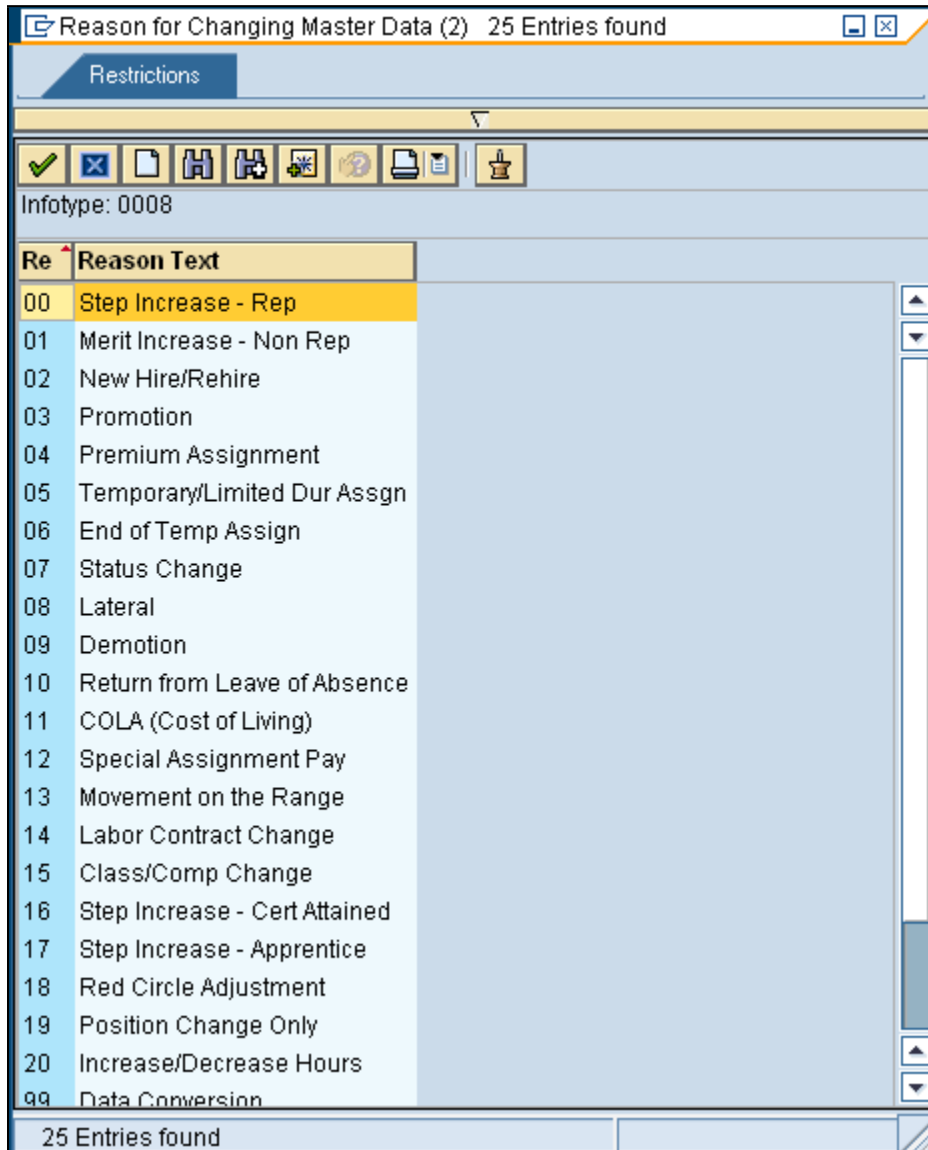
31. Click **Reason** matchcode . The Reason for Changing Master Data (XXXX) dialog box displays.





## Enter Personnel Action - Over Under Latfill: Temp Appt. (PA40)

Reason for Changing Master Data (XXXX) YYYY Entries found







32. Select **05 Temporary/Limited Dur Assgn** list item **05 Temporary/Limited Dur Assgn** .

33. Click **Copy** button  .



### Enter Personnel Action - Over Under Latfill: Temp Appt. (PA40)

#### Create Basic Pay (0008)

34. Click **Enter** button  to validate entries.
  -  Select the scale level for employee pay increase. For pay grades, enter the amount in the **Amount** field.
35. Click **Save** button  . The *Copy Date Specifications (0041)* screen displays.
  -  The system displays the message, "*Record valid from XXXX to YYYY delimited at end*".



### Enter Personnel Action - Over Under Latfill: Temp Appt. (PA40)

#### Copy Date Specifications (0041)

Personnel No 123456 Name Relationship B017 Over fill

EE group 1 Regular Pers.area 1130 Water

EE subgroup 01 FT Covered, Negative Pers. subarea 3150 DCTU-AFSC Stat Active

Start 06/02/2009 to 12/31/9999

Date Specifications (0041)			
Date type	Date	Date type	Date
01 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		

Record created

36. Click **Bureau Start Date** field  .



The system displays the message, "Record created".



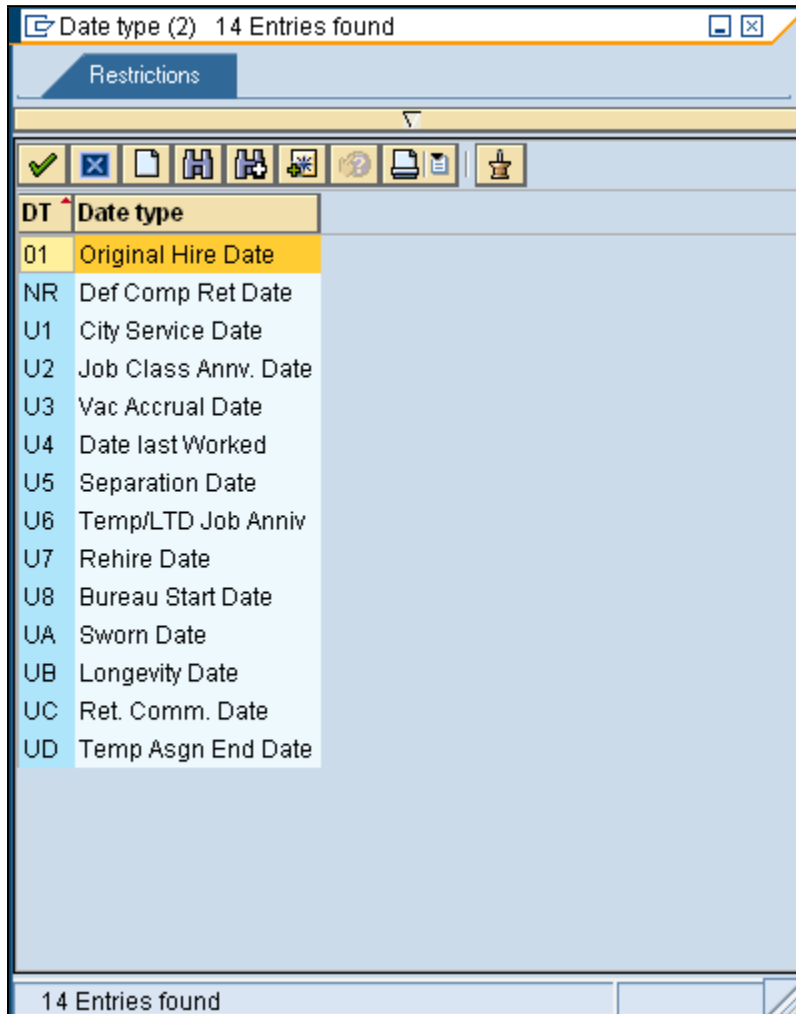
Subtype "U6" should default as part of the Temporary action, if not, complete manually.

37. Click **Bureau Start Date** matchcode . The *Date type (XXXX)* dialog box displays.



## Enter Personnel Action - Over Under Latfill: Temp Appt. (PA40)

Date type (XXXX) YYYY Entries found



38. Select **U6 Temp/LTD Job Anniv** list item **U6 Temp/LTD Job Anniv** .

39. Click **Copy** button  .



### Enter Personnel Action - Over Under Latfill: Temp Appt. (PA40)

#### Copy Date Specifications (0041)

Personnel No 123456 Name Relationship B017 Over fill

EE group 1 Regular Pers.area 1130 Water

EE subgroup 01 FT Covered, Negative Pers. subarea 3150 DCTU-AFSC Stat Active

Start 06/02/2009 to 12/31/9999

Date Specifications (0041)			
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	U6	

40. Click **Bureau Start Date** field  .
41. Click **Enter** button  to validate entries.
42. Click **Save** button  . The *Create Monitoring of Tasks (0019)* screen displays.  
 The system displays the message, "Record valid from XXXX to YYYY delimited at end".



## Enter Personnel Action - Over Under Latfill: Temp Appt. (PA40)

### Create Monitoring of Tasks (0019)

The screenshot shows the SAP 'Create Monitoring of Tasks (0019)' form. The form is divided into several sections: Personnel data, Task data, Reminder data, and Comments. The 'Date of Task' field has a checked checkbox. The 'Processing indicator' is set to 'New task'. The status bar at the bottom indicates 'Record created'.

43. Click **Date of Task** field  .






The system displays the message, "Record created".

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

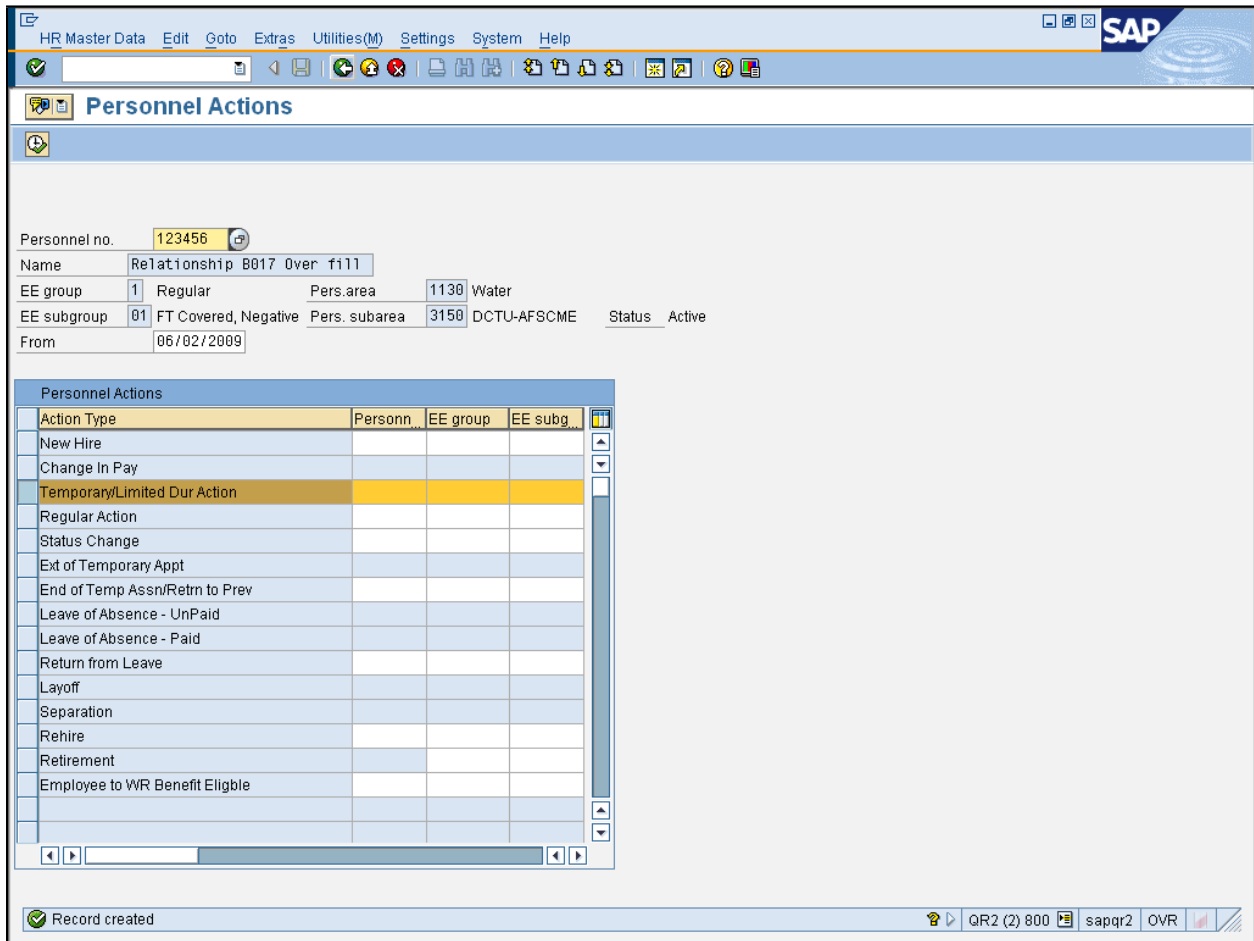
Field	R/O/C	Description
Date of Task	R	Task type effective date. <b>Example:</b> 120209





### Enter Personnel Action - Over Under Latfill: Temp Appt. (PA40)

- 45. Click **Enter** button  to validate entries.
- 46. Click **Save** button  . The *Personnel Actions* screen displays.  
 The system displays the message, *Save your entries*".

#### Personnel Actions



The screenshot shows the SAP HR Master Data interface for entering a personnel action. The top menu bar includes 'HR Master Data', 'Edit', 'Goto', 'Extras', 'Utilities(M)', 'Settings', 'System', and 'Help'. The main window title is 'Personnel Actions'. Below the title, there are input fields for 'Personnel no.' (123456), 'Name' (Relationship B017 Over f111), 'EE group' (1 Regular), 'Pers.area' (1130 Water), 'EE subgroup' (01 FT Covered, Negative), 'Pers. subarea' (3150 DCTU-AFSCME), and 'Status' (Active). The 'From' date is 06/02/2009. A table titled 'Personnel Actions' is displayed with columns for 'Action Type', 'Personn...', 'EE group', and 'EE subj...'. The 'Temporary/Limited Dur Action' row is highlighted in yellow. The bottom status bar shows 'Record created' and 'QR2 (2) 800 sapqr2 OVR'.

- 47. Click **Exit** button  .  
 The system displays the message, *"Record created"*.



**PA40**

**Work Instruction**

## **Enter Personnel Action - Over Under Latfill: Temp Appt. (PA40)**

### **Result**

You have successfully entered an employee into an over, under, or lateralfill position.