

Tax Reporter Defaults

Transaction Code:
PU19

Purpose Use this procedure to add the Personnel Area Numbers to the Tax Reporter Company code.
Use this procedure to set up the Tax Reporter to have the **Test Tabs** default.

Trigger Perform this procedure to set the Tax Reporter Defaults.

□

Prerequisites None.

End User Role Tax Processor Role.

Change History	Change Description
02/03/2011	Created
09/11/2012	Added steps for Windows 7 users (steps 3.2.1- 3.2.8)

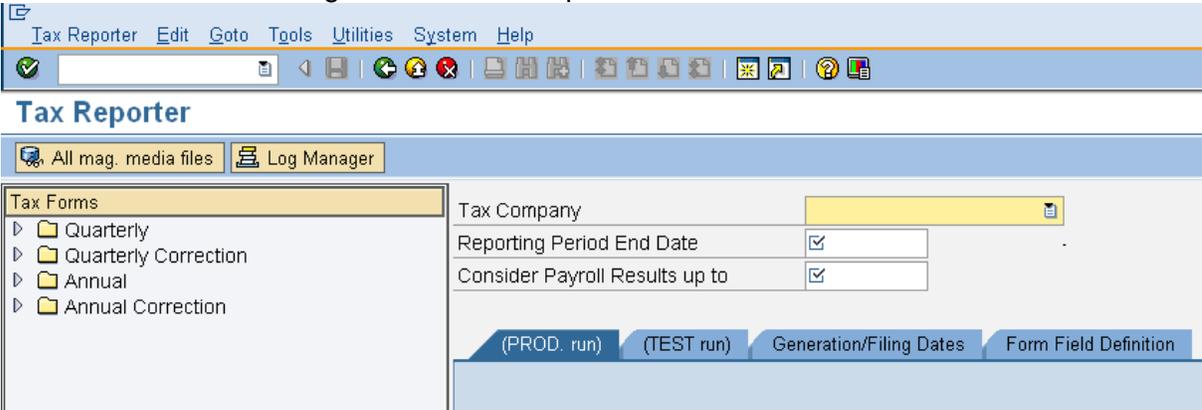
Menu Path Human Resources → Payroll → Americas → USA Subsequent activities → Period-Independent → Payroll supplement
PU19 Tax Reporter

Transaction Code PU19

Helpful Hints

Agencies should run (in **test** mode) after each payroll to verify the deposits and liabilities are in balance. Running in test mode will allow the agencies to view their 941s without creating a final document. At the end of the quarter, when the 941 is in balance, a production run can be made and the filing date can be generated.

1. Start the transaction using the above menu path or transaction code **PU19**.



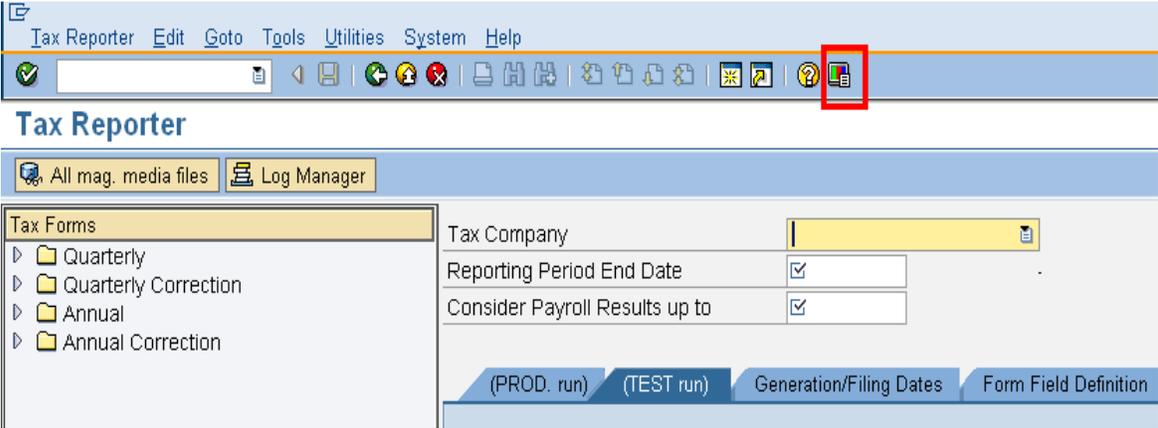
2. Perform one of the following:

IF	GO TO
You would like to add Personnel Area Numbers to the Tax Company menu	Step 3.1
You would like to add Personnel Area Numbers to the Tax Company menu and you have Windows 7	Step 3.2.1
You would like to set the default of the report to Test Run	Step 4

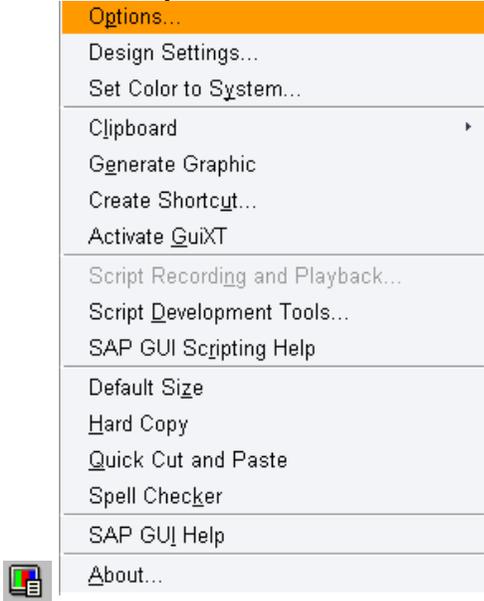
3. To turn on the Personnel Area ID numbers in the drop down list, follow these steps:



3.1.1 From the toolbar, click the  (Customizing of local layout) button.

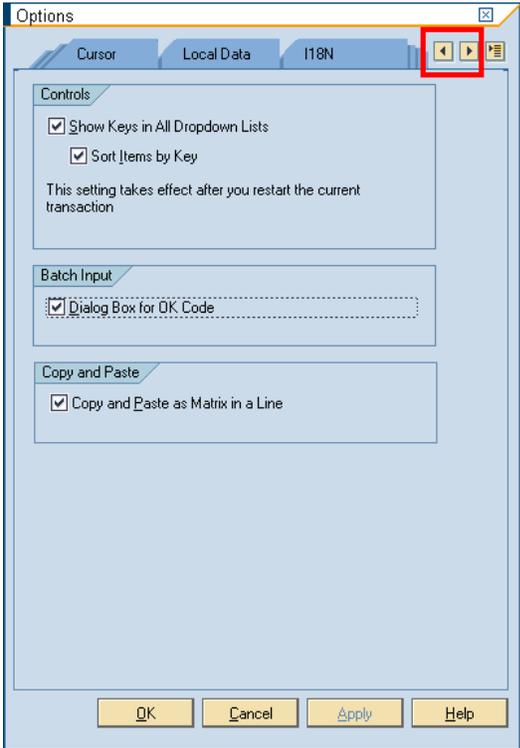


3.1.2 Select **Options** from the selection list.

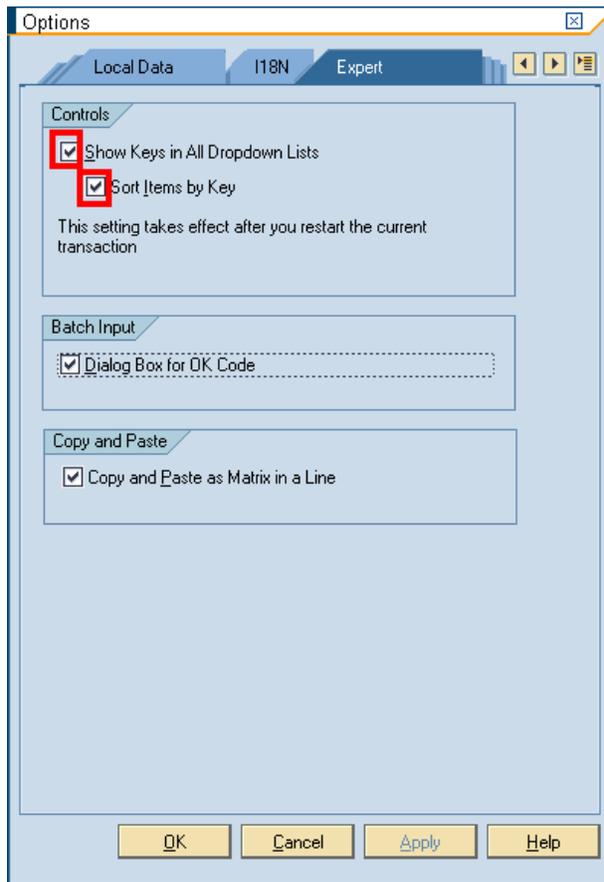


3.1.3 Use the   (arrows) until you reach the **Expert** tab.

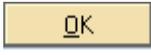
 You can also select the  and select **Expert**



3.1.4 Select the boxes as shown in the picture below.



3.1.5 Click the  (Apply) button.

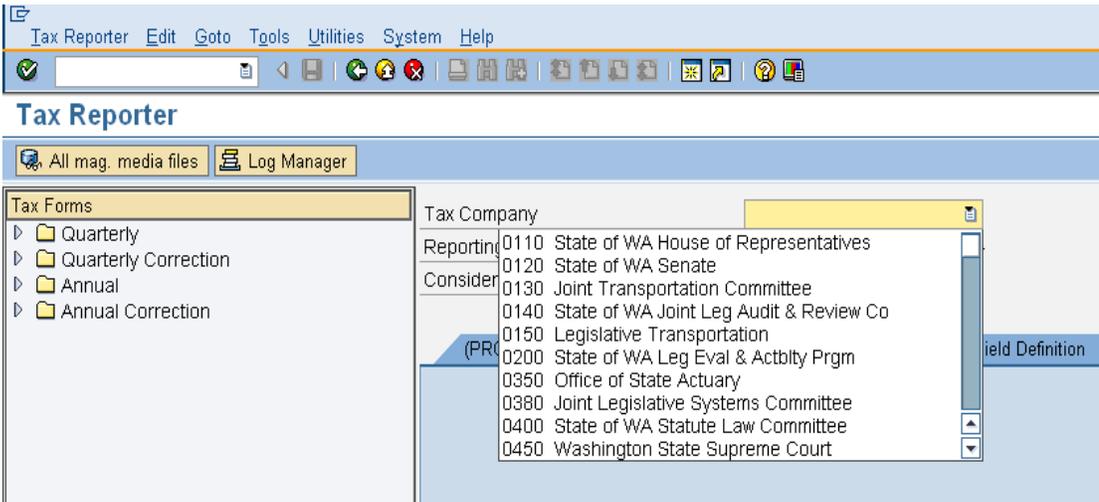
3.1.6 Click the  (OK) button.



After clicking OK you will be taken back to the Tax Reporter. Use the  (**Back**) to return to the SAP Easy Access Screen to reset the Tax Reporter so the Personnel Area's numbers are in numeric order.

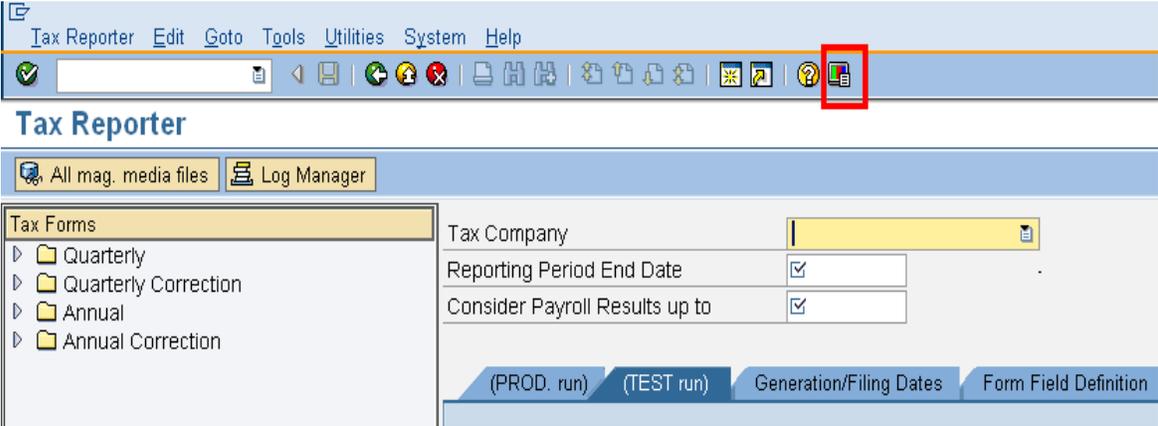


You can simply type the first two or three numbers of the Personnel Area to make the selection.



If you use the SAP Logon Pad 720 (**Windows 7**) follow Steps 3.2.1 through 3.2.8 to add the Personnel Area ID's to the Tax Company dropdown list.

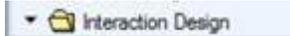
3.2.1 From the toolbar, click the  (Customizing of local layout) button.



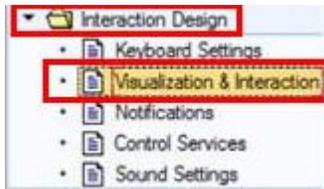
3.2.2 Select **Options** from the selection list.



3.2.3 Select the **Interaction Design** folder from the **SAP GUI Options**



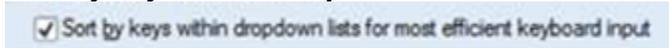
3.2.4 Select **Visualization & Interaction**

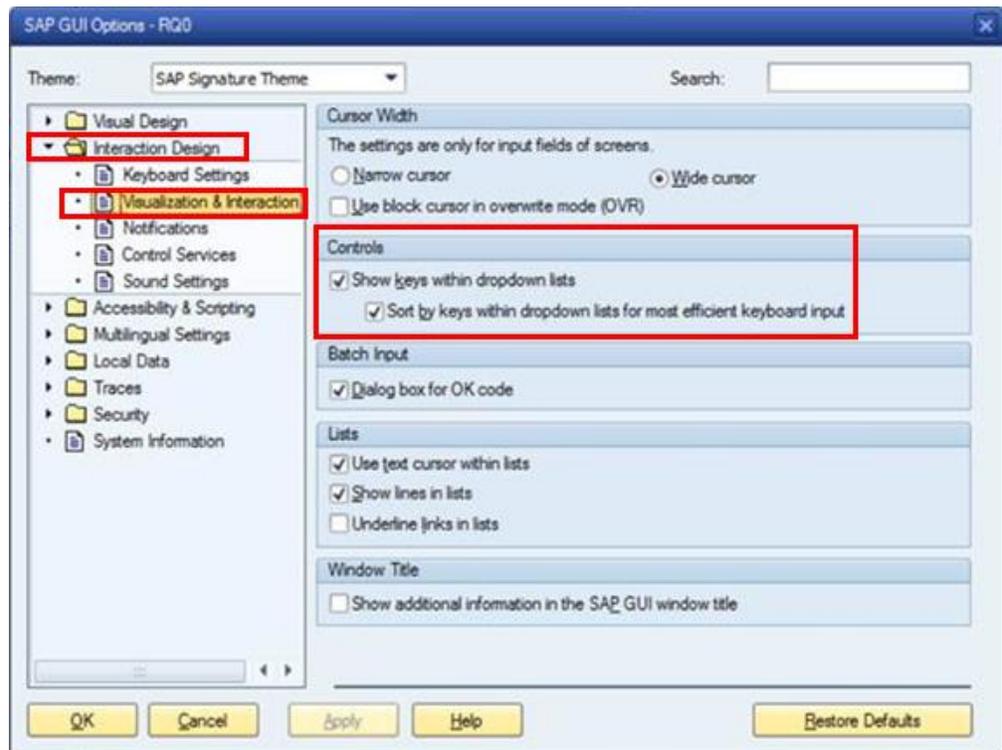


3.2.5 Under the **Controls** section, click the box to the left of: **Show keys within dropdown lists**

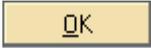


3.2.6 Under the **Controls** section, click the box to the left of: **Sort by keys within dropdown lists for most efficient keyboard input**





3.2.7 Click  to accept changes.

3.2.8 Click the  (OK) button.

 After clicking OK you will be taken back to the Tax Reporter.

Use the  (**Back**) to return to the SAP Easy Access Screen to reset the Tax Reporter so the Personnel Area's numbers are in numeric order.

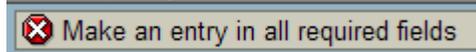
 You can simply type the first two or three numbers of the Personnel Area to make the selection.

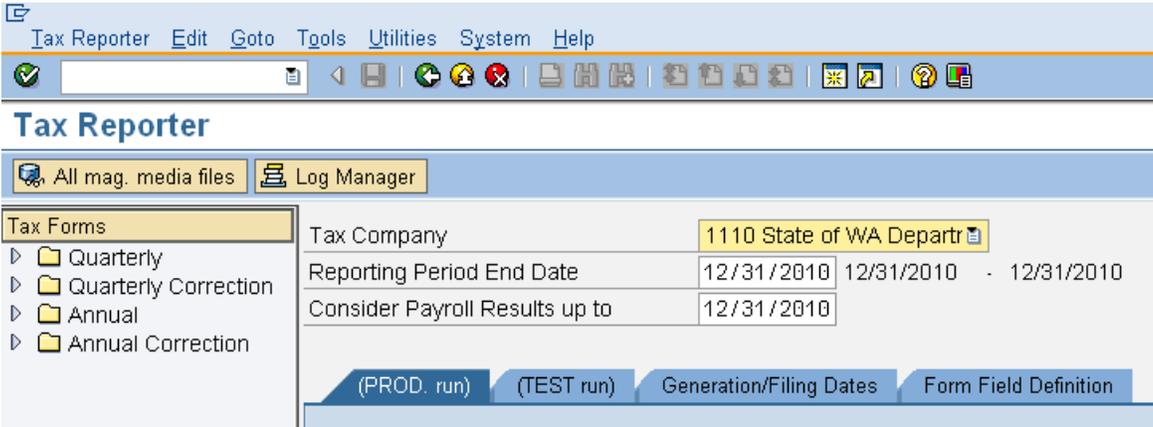
4. To set the default of the report to **Test Run**, complete the following fields:

Field Name	R/O/C	Description
Tax Company	R	<p>Select your agency's Tax Company ID.</p>  <p>Agencies that have more than one tax identification number (agencies with sub-areas) have the option to roll them all into one report. To view a specific agency, just enter that agency's tax company information.</p> <p>Example: 1110 (Department of Personnel)</p>
Reporting Period End Date	R	<p>The Reporting Period End Date.</p>  <p>Enter the Quarter End Date as listed below.</p> <p>Quarter 1 – Period 03/31/20XX Quarter 2 – Period 06/30/20XX Quarter 3 – Period 09/30/20XX Quarter 4 – Period 12/31/20XX</p> <p>Example: 12/31/2010</p>
Consider Payroll Results up to	R	<p>The Consider Payroll Results up to.</p>  <p>Enter the Quarter End Date. (Using the same format above.)</p> <p>Example: 12/31/2010</p>

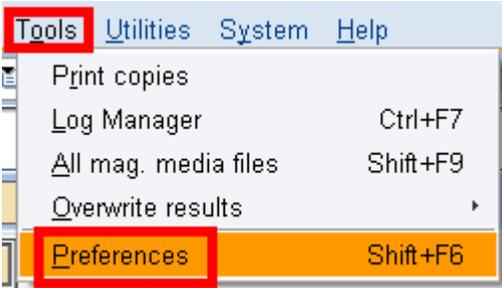


All three fields are required and must be filled before moving on to the next step or you will receive the following message:

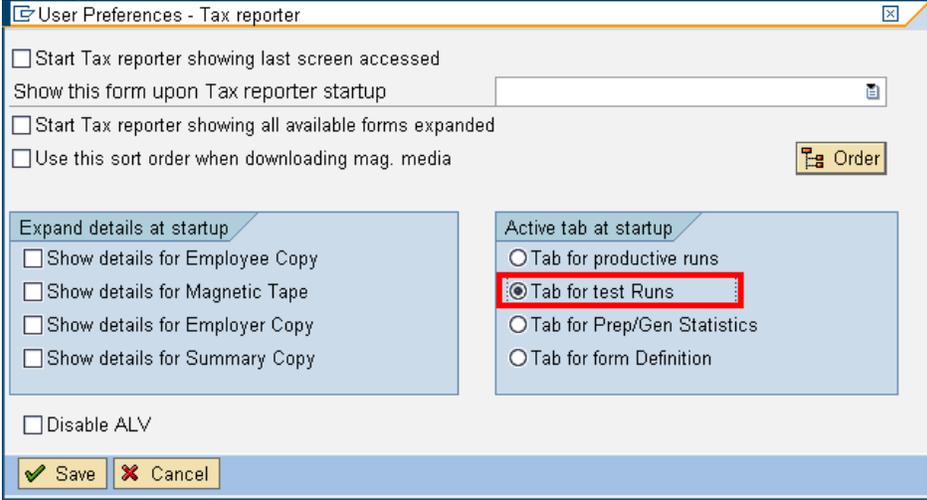


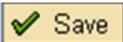


- 5. Click  (Enter) to validate the entry.
- 6. From the menu bar, click on **Tools** and select **Preferences** from the selection list.



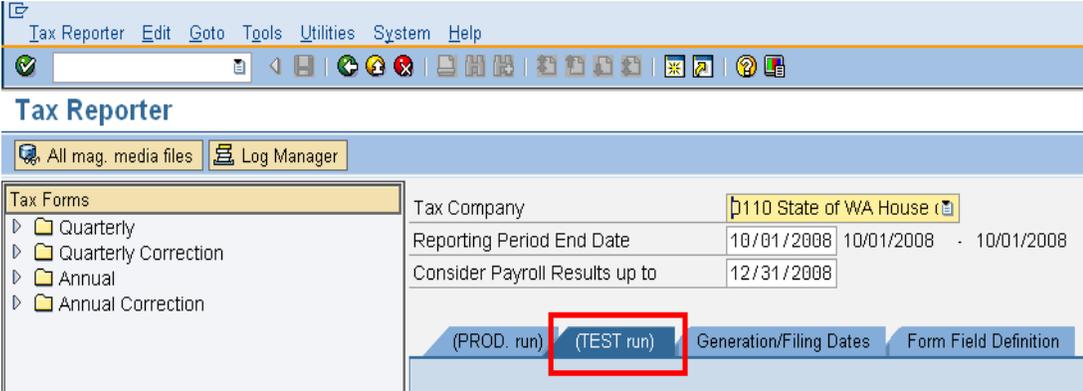
- 7. Select  Tab for test Runs (Tab for test runs) under the Active tab at startup section.



8. Click  (Save) to save the options.



After clicking OK you will be taken back to the Tax Reporter. Use the  (Back) to return to the SAP Easy Access Screen to reset the Tax Reporter so the Test run is the first tab to appear.



Results
You have set the Tax Reporter Defaults to display Personnel Area ID's and set the Test Tab to default.