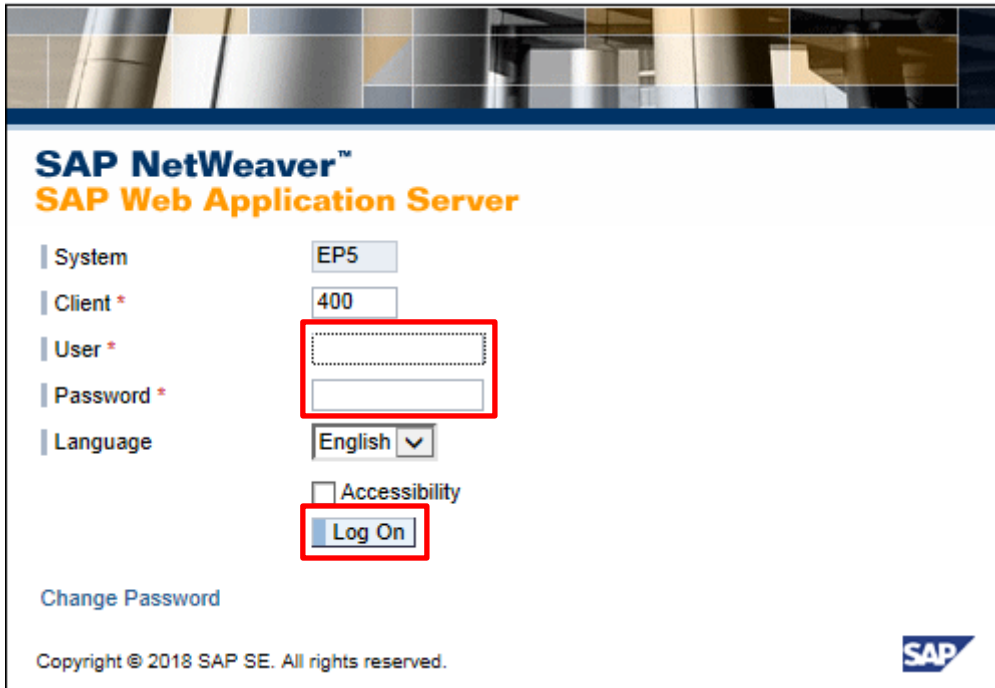


## Section 1: Initial Set Up and Logging On

### 1.1 SAP Log on


- To connect to SAP for HR and Payroll you will need to gain access through the secure portal in the usual way.
- Once you have gained access to the SAP log on screen, using your personal SAP **User ID** and **password** enter your details and click the '**Log On**' button.



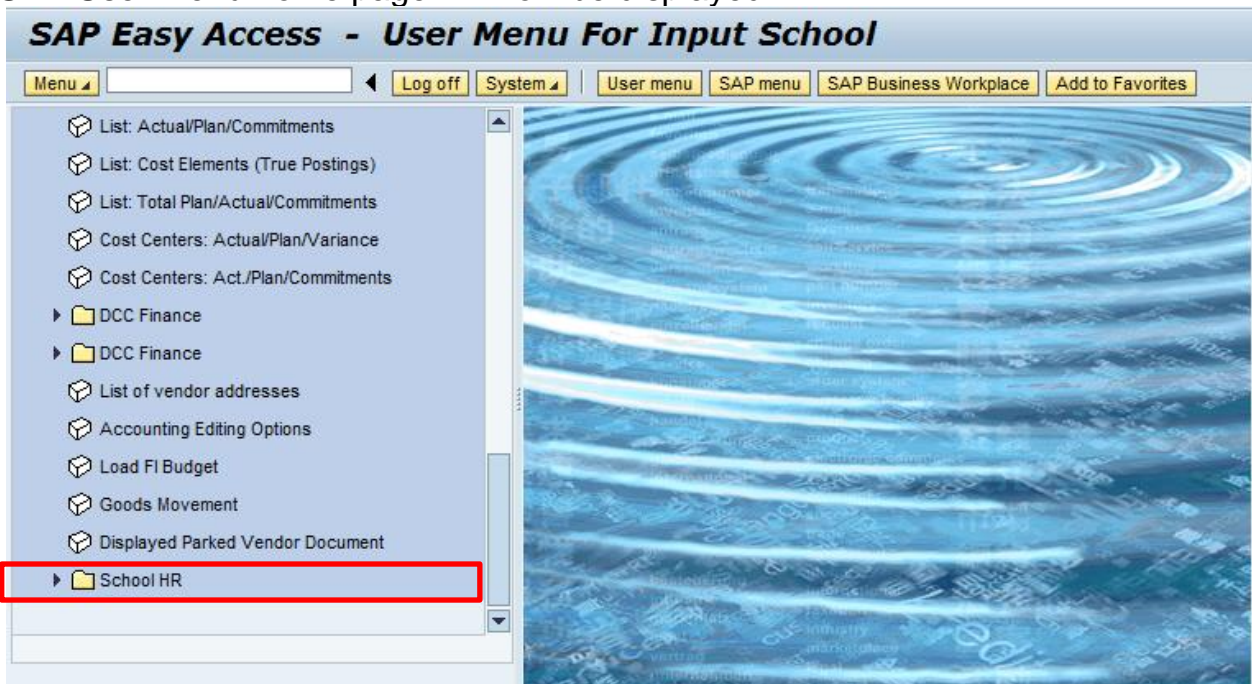
**SAP NetWeaver™**  
**SAP Web Application Server**

System EP5  
Client \* 400  
User \*   
Password \*   
Language English ▾  
 Accessibility

[Change Password](#)

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The SAP User Menu home page will now be displayed.



**SAP Easy Access - User Menu For Input School**

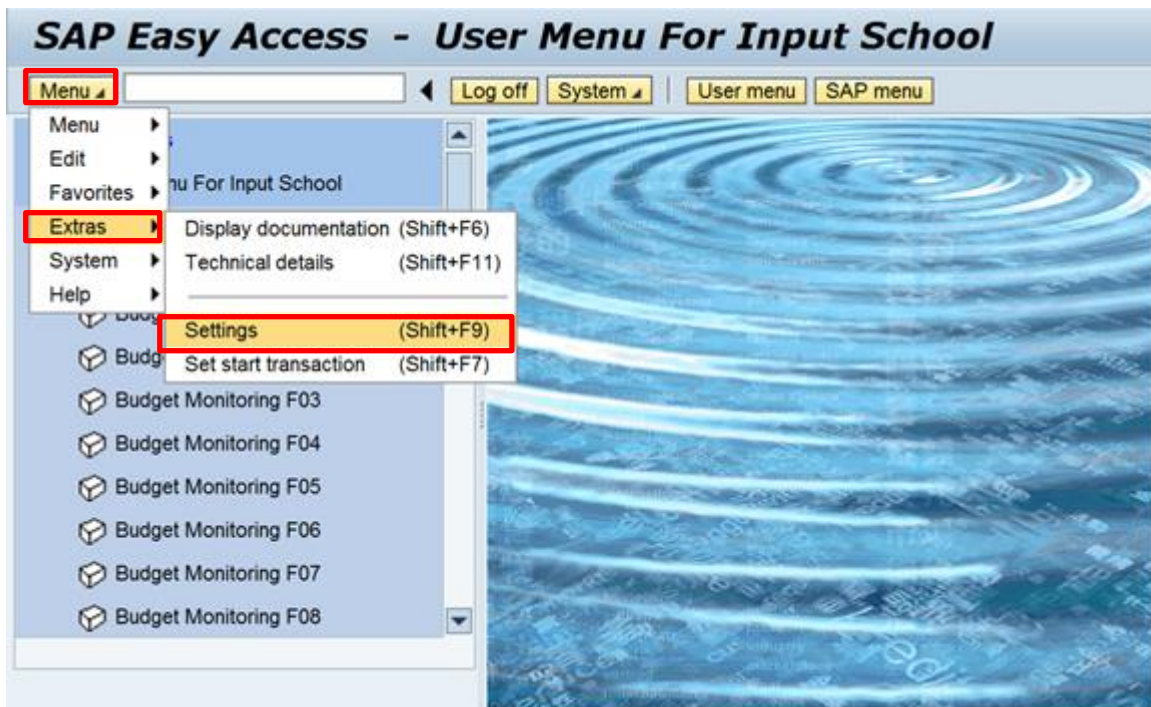
Menu  ◀ Log off System ▾ User menu SAP menu SAP Business Workplace Add to Favorites

- ▢ List: Actual/Plan/Commitments
- ▢ List: Cost Elements (True Postings)
- ▢ List: Total Plan/Actual/Commitments
- ▢ Cost Centers: Actual/Plan/Variance
- ▢ Cost Centers: Act./Plan/Commitments
- ▶ ▢ DCC Finance
- ▶ ▢ DCC Finance
- ▢ List of vendor addresses
- ▢ Accounting Editing Options
- ▢ Load FI Budget
- ▢ Goods Movement
- ▢ Displayed Parked Vendor Document
- ▶ ▢ **School HR**

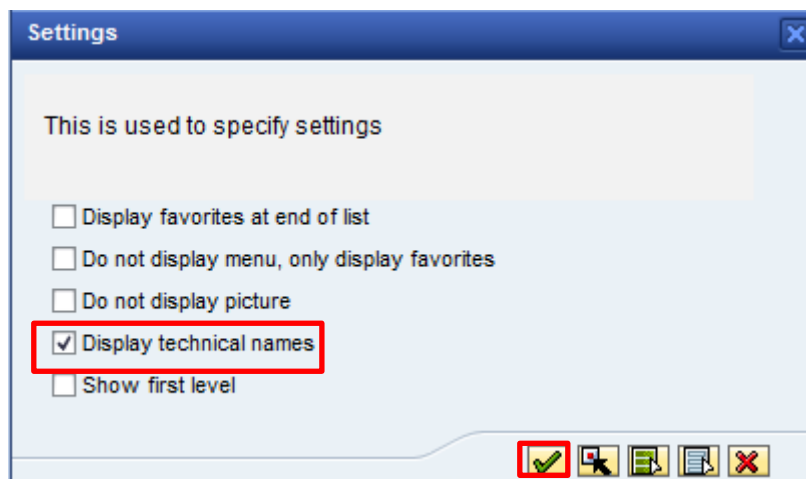
## 1.2 Technical Set Up

The first time that you log into SAP you will need to set some basic settings. Once set these will be your default settings each time you log in.

- On the SAP User Menu, click '**Menu**'.
- Select '**Extras**'.
- Click '**Settings**'.



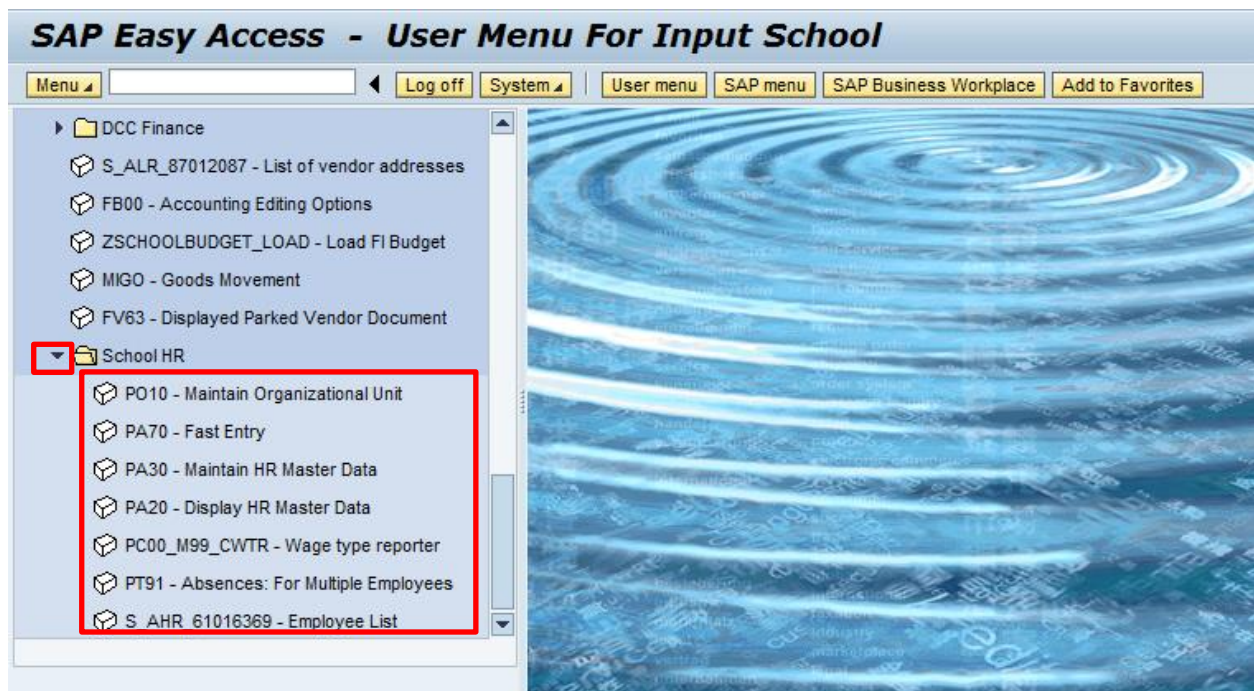
- Click the box to the left of '**Display Technical Names**' (tick).
- Click the '**green tick**'.



You will now see the transaction codes e.g. PA70 prior to the description.



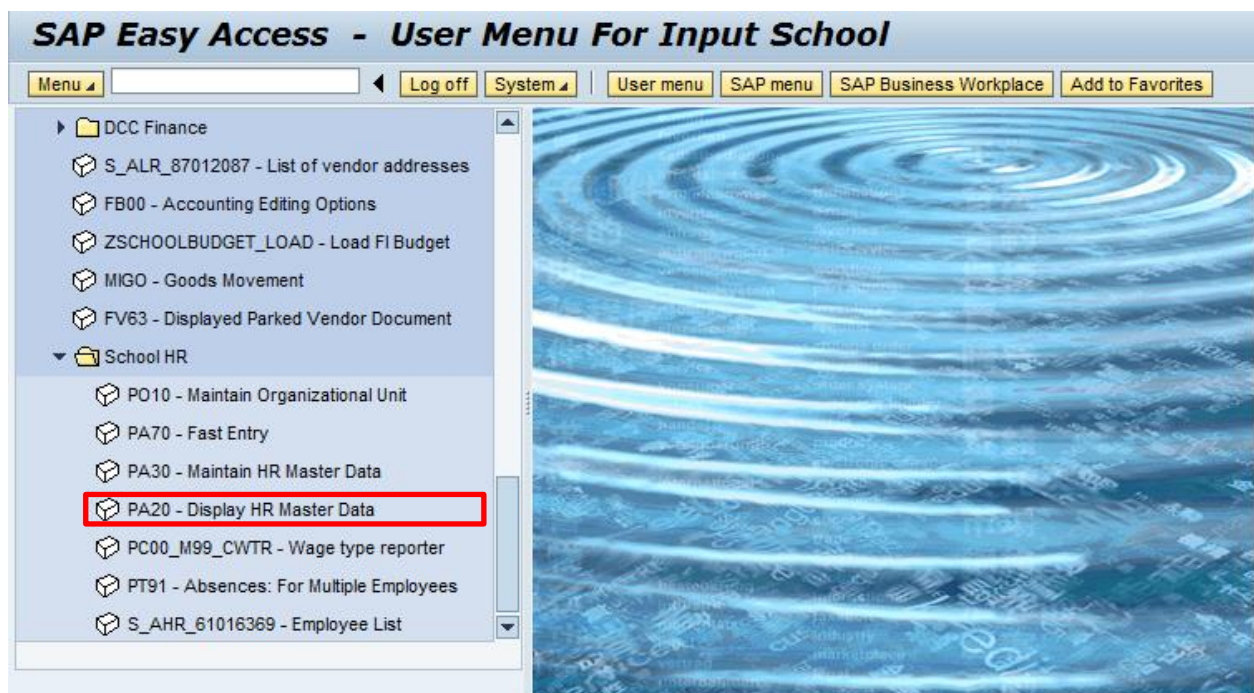
- Click the arrow to the left of the folder 'School HR' to open the folder – this will display the transactions required for HR and Payroll actions.



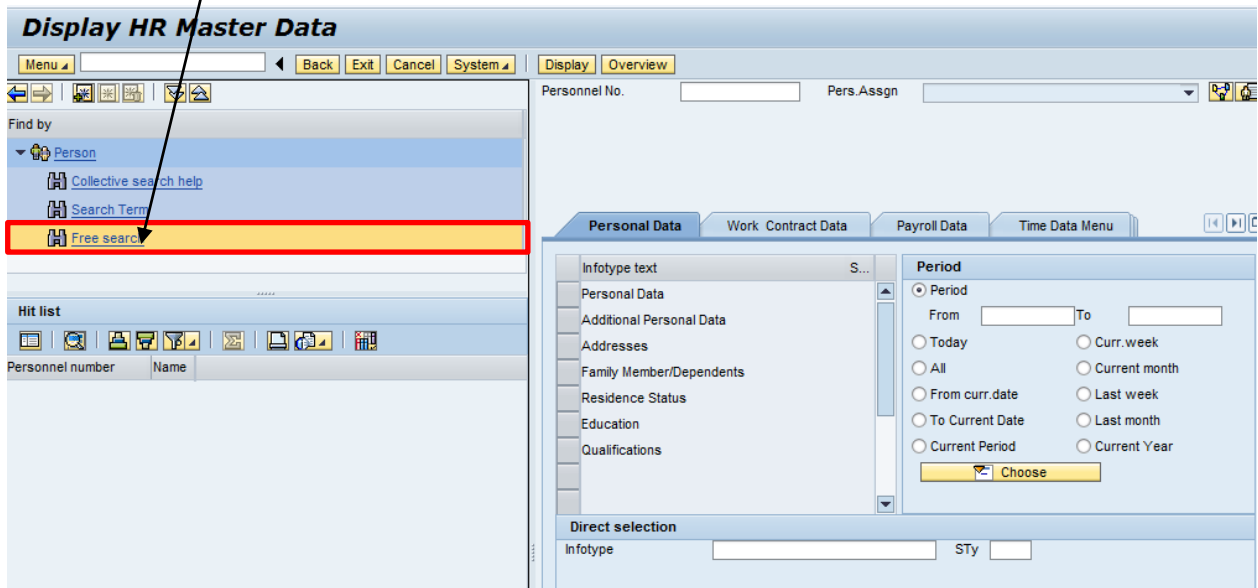
### 1.3 Creating a Staff List

To create your staff list:

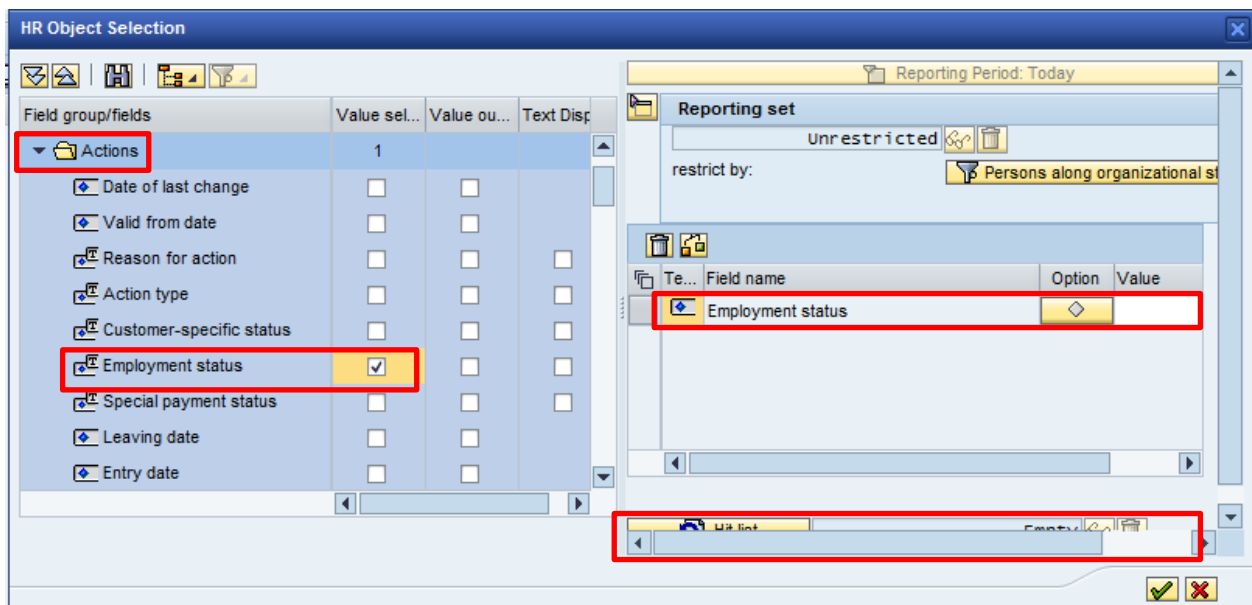
- Double click on 'PA20 – Display HR Master Data'.



- Click 'Free Search'.



- Click the arrow to the left of the folder 'Actions'.
- Click the first box to the immediate right of 'Employment Status' to tick.



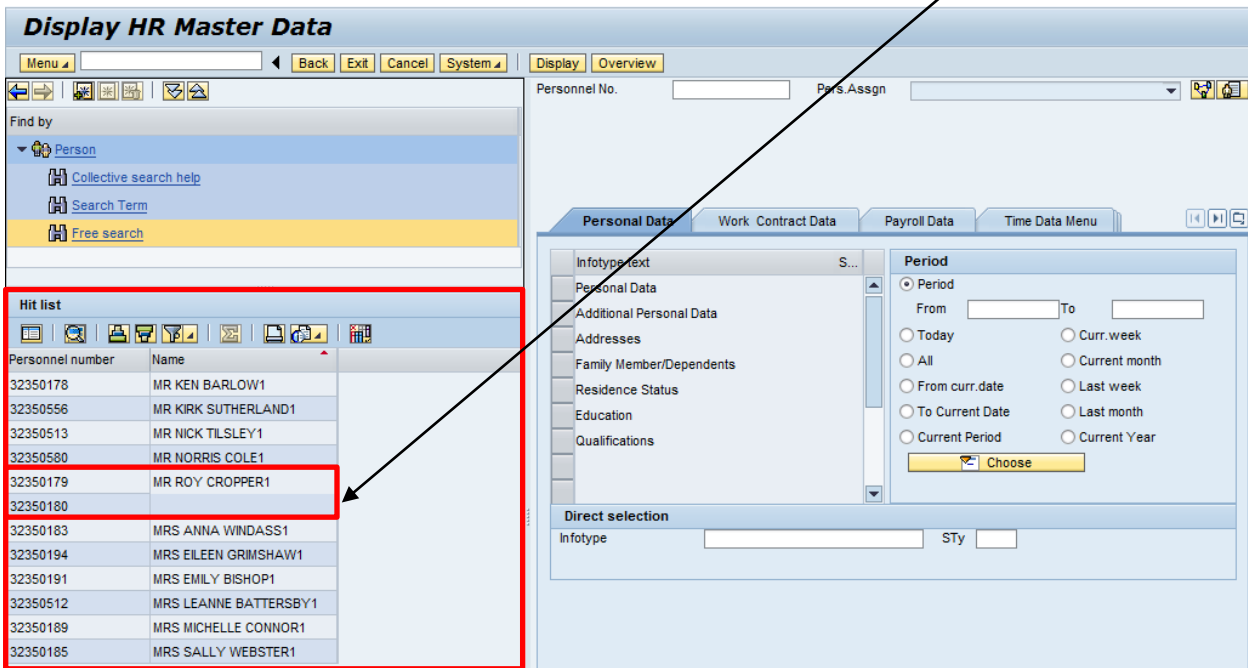
- Click the arrow to the left of the folder '**Organisational Assignment**'.
- Click the first box to the immediate right of '**Cost Centre**' to tick.
- Type '**3**' in the value box for '**Employment Status**'. (See screenshot below).
- Type your **Schools Cost Centre** in the value box for '**Cost Centre**'.
- Click '**Hit List**' – this will identify the number of active records held against the cost centre selected.
- Click the **green tick** icon in the bottom right corner.

The screenshot shows the 'HR Object Selection' dialog box. The left pane lists various field groups, with 'Organizational Assignment' expanded. The 'Cost center' field is checked. The right pane shows the selected fields: 'Employment status' with a value of '3' and 'Cost center' with a value of 'cip0011'. The 'Hit list' button is highlighted at the bottom, and a green tick icon is visible in the bottom right corner.

Field name	Option	Value	Fur...
Employment status	☰	3	↔
Cost center	◇	cip0011	↔

Your list of current employees will now be displayed with the payroll numbers of your staff for use when inputting Additional Hours/Payments in transaction 'PA70 – Fast Entry'.

If an employee holds more than one job they will appear in the list multiple times.



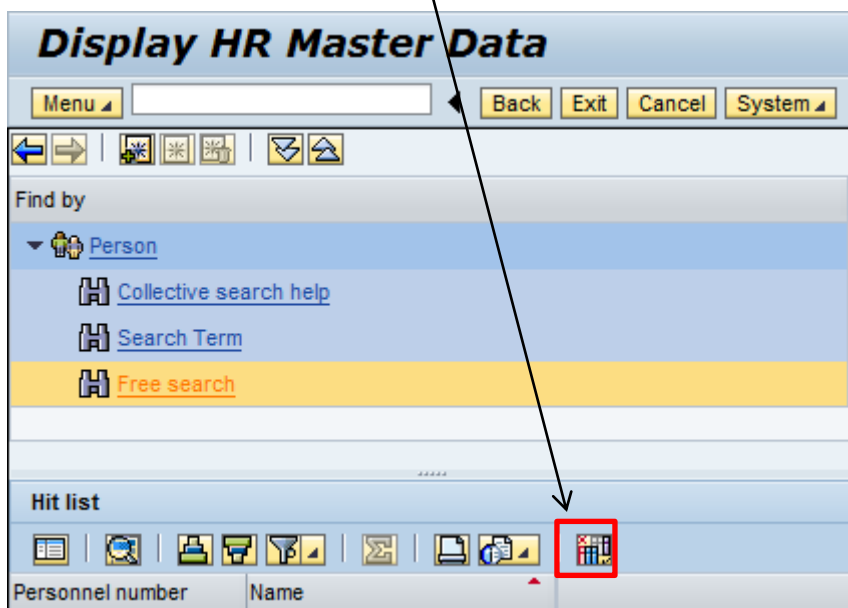
**Tip:** Once a new starter has been created by the Shared Services Centre they will automatically appear in your staff list.

**Tip:** Once an employee has left, they will be removed from your list the **day after** their leaving date.

### 1.4 List Configuration

To add more information to your staff list:-

- Click the 'column configuration' icon  in the list pane immediately above the employee list on the right hand side.





- This will bring up a box that will enable you to select which columns you would like to display. You should always select:
  - **Position Name**
- Scroll down the list to find ‘**Position Name**’
- Click in the white box to select then **green tick** icon to save your selection.



The list can be sorted into an order which works best for you. To do this:

- Click on one of the column headings (i.e. Position Name) and click one of the ascending/descending icons to sort alphabetically/numerically.

 (ascending) or  (descending).

Before

Personnel number	Name	Position name
32350178	MR KEN BARLOW1	Teacher FT 1
32350179	MR ROY CROPPER1	Teaching & Learning Assistant 1
32350180	MR ROY CROPPER1	Mid Day Supervisor 1
32350183	MRS ANNA WINDASS1	Teacher PT 1
32350185	MRS SALLY WEBSTER1	Supply Teacher 1
32350189	MRS MICHELLE CONNOR1	Teaching & Learning Assistant 1
32350191	MRS EMILY BISHOP1	Mid Day Supervisor 1
32350194	MRS EILEEN GRIMSHAW1	Cleaner FT 1
32350512	MRS LEANNE BATTERSBY1	Teaching & Learning Assistant 1
32350513	MR NICK TILSLEY1	Technician 1
32350556	MR KIRK SUTHERLAND1	Caretaker PT 1
32350580	MR NORRIS COLE1	Caretaker Relief 1

After

Personnel number	Name	Position name
32350556	MR KIRK SUTHERLAND1	Caretaker PT 1
32350580	MR NORRIS COLE1	Caretaker Relief 1
32350194	MRS EILEEN GRIMSHAW1	Cleaner FT 1
32350180	MR ROY CROPPER1	Mid Day Supervisor 1
32350191	MRS EMILY BISHOP1	
32350185	MRS SALLY WEBSTER1	Supply Teacher 1
32350178	MR KEN BARLOW1	Teacher FT 1
32350183	MRS ANNA WINDASS1	Teacher PT 1
32350179	MR ROY CROPPER1	Teaching & Learning Assistant 1
32350189	MRS MICHELLE CONNOR1	
32350512	MRS LEANNE BATTERSBY1	
32350513	MR NICK TILSLEY1	Technician 1

**Tip:** If you sort by name it will sort by Miss, Mr, Mrs and then alphabetically.