

## Payroll Set up Display HR Master Data – PA20

### Section 1 – Introduction

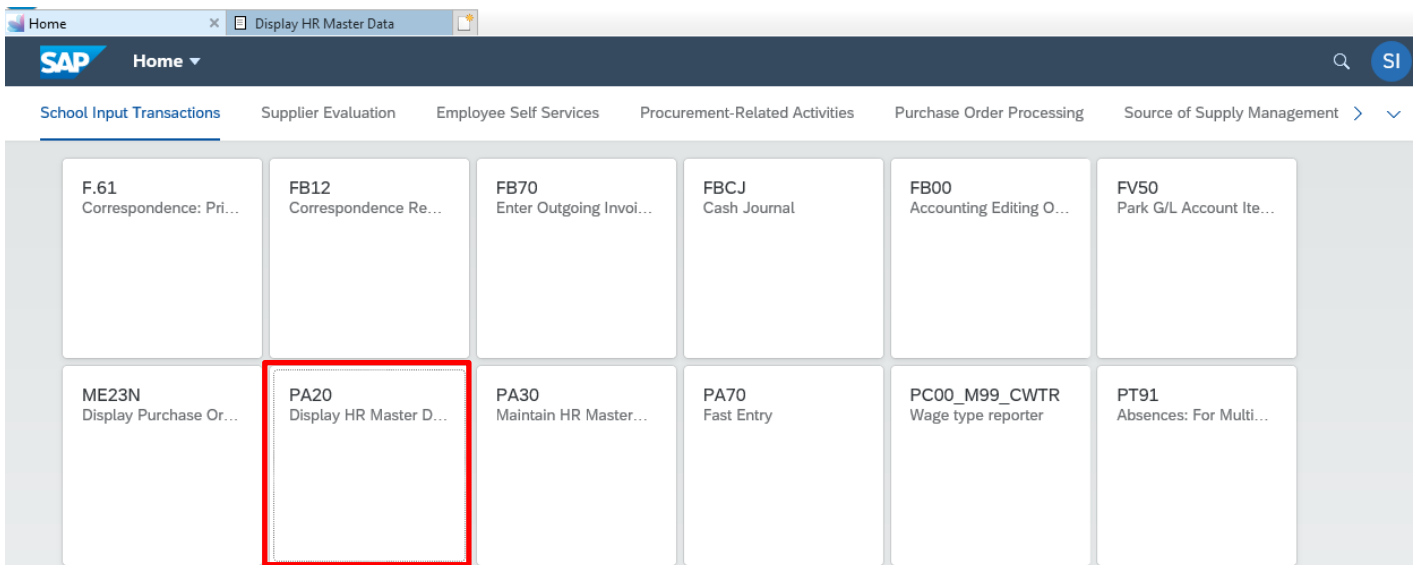
This guidance shows how to use the PA20 app to set up your Staff Hit List and configure it to display employee’s position names.

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Log into SAP

- This loads the Fiori Dashboard
- Click on the **PA20 Display HR Master Data app**



You will now be in the PA20 Display HR Master Data app.

## Section 2 – Setting up a Staff Hit List

- Click on Free Search on the left of the screen

The screenshot shows the SAP 'Display HR Master Data' interface. At the top, there is a header with the SAP logo, the title 'Display HR Master Data', and a user indicator 'ER1 (400)'. Below the header, there are navigation buttons: 'Menu', 'Display', 'Overview', and 'Refresh Data'. On the left side, there is a search menu with options: 'Collective Search Help', 'Search Term', and 'Free search'. The 'Free search' option is highlighted with a red rectangle. Below the search menu is a 'Hit list' section with a table header containing 'Personnel number' and 'Name'. The main content area is divided into several tabs: 'Personal Data', 'Work Contract Data', 'Payroll Data', 'Time Data Menu', and 'Travel Benefits Data'. The 'Personal Data' tab is active, showing a list of infotypes with radio buttons for selection. The 'Period' section on the right allows for date range selection with 'From' and 'To' fields, and radio buttons for various time periods like 'Today', 'Current Week', 'All', 'Current Month', 'From Today', 'Last Week', 'Until Today', 'Last Month', 'Curr. Period', and 'Current Year'. A 'Choose' button is located below these options. At the bottom, there is a 'Direct selection' section with 'Infotype:' and 'STy:' fields.

The following screen will appear

- Click the arrow to the left of the folder **Actions**

The screenshot shows the 'HR Object Selection' window. On the left, a list of field groups is displayed, with 'Actions' highlighted by a red rectangle. The right-hand panel is titled 'Reporting set' and shows a configuration area. At the top, it says 'Reporting Period: Today'. Below that, there is a dropdown menu set to 'Unrestricted' with refresh and delete icons. Underneath, it says 'restrict by:' followed by a dropdown menu set to 'Persons along organizational'. Below this is a 'Selections' section with a blue header that reads 'You can define selection conditions in this area.' and a sub-header that reads 'Fields can only be selected by selecting them correspondingly from the field list.' At the bottom of the right panel, there is a 'Hit list' button and an 'Empty' button with refresh and delete icons. At the very bottom of the window, there are 'Transfer hit list' and 'Cancel' buttons.

- From the dropdown list **click** the first white box to the immediate right of **Employment Status** to tick

The screenshot shows the 'HR Object Selection' window. On the left, a tree view lists various field groups. The 'Actions' group is expanded, and the 'Employment status' field is selected. The 'Employment status' field has a small white box to its right, which is highlighted with a red box. The 'Reporting set' panel on the right shows the 'Unrestricted' reporting set and the 'Persons along organizational' restriction. The 'Hit list' button is visible at the bottom of the window.

Field group/fields	Value...	Value...	Text...
<input type="checkbox"/> > Key Fields			
<input checked="" type="checkbox"/> > Actions	1		
<input type="checkbox"/> Date of last change	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Valid from date	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Reason for action	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Action type	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Customer-specific status	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Employment status	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Special payment status	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Leaving date	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Entry date	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Length of service (in days)	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Length of service (in months)	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Length of service (in years)	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> > Organizational Assignment			
<input type="checkbox"/> > Personal Data			
<input type="checkbox"/> > Challenge			
<input type="checkbox"/> > Leave Entitlement			
<input type="checkbox"/> > Addresses			
<input type="checkbox"/> > Planned Working Time			
<input type="checkbox"/> > Basic Pay			

- Now click the arrow to the left of the next folder **Organisational Assignment**

The screenshot shows the 'HR Object Selection' window. On the left is a table of field groups and fields. The 'Organisational Assignm' folder is highlighted with a red box. On the right is a 'Reporting set' configuration panel.

Field group/fields	Value...	Value...	Text...
> Key Fields			
> Actions	1		
Date of last change	<input type="checkbox"/>	<input type="checkbox"/>	
Valid from date	<input type="checkbox"/>	<input type="checkbox"/>	
Reason for action	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action type	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer-specific sta	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employment status	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Special payment stat	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Leaving date	<input type="checkbox"/>	<input type="checkbox"/>	
Entry date	<input type="checkbox"/>	<input type="checkbox"/>	
Length of service (in	<input type="checkbox"/>	<input type="checkbox"/>	
Length of service (in	<input type="checkbox"/>	<input type="checkbox"/>	
Length of service (in	<input type="checkbox"/>	<input type="checkbox"/>	
> Organisational Assignm			
> Personal Data			
> Challenge			
> Leave Entitlement			
> Addresses			
> Planned Working Time			
> Basic Pay			

Reporting set configuration:

- Reporting Period: Today
- Reporting set: Unrestricted
- restrict by: Persons along organizational
- Table with columns: Tex..., Field name, Option, Value. Row: Employment status, [dropdown arrow]
- Hit list: Empty
- Buttons: Hit list, Empty, Transfer hit list, Cancel

- From the dropdown list **click** the first box to the immediate right of 'Cost Centre' to tick. (You may have to use the scroll bar in the middle of the screen to scroll down to this option)

The screenshot shows the 'HR Object Selection' window. On the left, a table lists various HR fields. The 'Organizational Assignment' field is expanded, and the 'Cost center' field is selected with a checkmark. On the right, the 'Reporting set' configuration is shown, including a 'restrict by' dropdown set to 'Persons along organizational' and a table of selected fields.

Field group/fields	Value...	Value...	Text...
<input type="checkbox"/> Special payment status	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Leaving date	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Entry date	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Length of service (in days)	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Length of service (in months)	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Length of service (in years)	<input type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/> Organizational Assignment	1		
<input type="checkbox"/> Payroll area	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Work contract	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Personnel subarea	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Company code	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Formatted name of employee	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Funds center	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Fund	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Business area	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Legal person	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Controlling area	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Cost center	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Supervisor area	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Organizational unit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Object type	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Reporting set configuration:

- Reporting Period: Today
- Unrestricted
- restrict by: Persons along organizational
- Selected fields table:

Tex...	Field name	Option	Value
<input type="checkbox"/>	Employment status	◆	
<input type="checkbox"/>	Cost center	◆	

Hit list: Empty

- There are now on the right of the screen **Field name** options that need to be completed with a **Value**
- Type **3** in the value box for **Employment Status**
- Type your **School's Cost Centre** in the value box for **Cost Centre**
- Click on **Hit List** – this will identify the number of active records held against the cost centre selected (the word Empty will change to number of persons (see next screenshot))

The screenshot shows the 'HR Object Selection' window. On the left, a list of fields is shown with checkboxes and input boxes for 'Value...' and 'Text ...'. The 'Cost center' field is checked, and its 'Value...' box contains '1'. On the right, a 'Reporting set' panel is visible, showing 'Unrestricted' and 'restrict by: Persons along organizational structure'. Below this, a table lists selected fields with their 'Option' and 'Value'.

Tex...	Field name	Option	Value
<input type="checkbox"/>	Employment status	◆	3
<input type="checkbox"/>	Cost center	◆	CIP1234

At the bottom of the window, a 'Hit list' button is highlighted with a red box, and the status 'Empty' is displayed next to it. Other buttons include 'Transfer hit list' and 'Cancel'.

- The number of Persons is then displayed next to **Hit List**
- Now click on **Transfer hit list** in bottom right corner of the screen

The screenshot shows the 'HR Object Selection' dialog box. On the left, a list of fields is shown with checkboxes and input fields. The 'Cost center' field is checked, and its value is '1'. On the right, the 'Reporting set' is configured as 'Unrestricted' with a restriction of 'Persons along organizational structure'. Below this, a table shows selected fields and their values:

Tex...	Field name	Option	Value
<input type="checkbox"/>	Employment status	<input type="checkbox"/>	3
<input type="checkbox"/>	Cost center	<input type="checkbox"/>	CIP1234

At the bottom, a 'Hit list' button is highlighted with a red box, showing '12 Persons' next to it. Below that, a 'Transfer hit list' button is also highlighted with a red box, along with a 'Cancel' button.



- Your list of current employees will now be displayed with the payroll numbers of your staff for use when inputting Additional Hours/Payments in **PA70 – Fast Entry app** and entering Staff Absences in **PA30 – Maintain HR Master Data app**
- If an employee holds more than one job they will appear in the list multiple times
- Once a new **starter** has been created by HR Services, they will automatically appear in your staff list
- Once an employee has **left**, they will be removed from your list the **day after** their leaving date

The screenshot shows the SAP 'Display HR Master Data' interface. At the top, there are navigation buttons for 'Menu', 'Display', 'Overview', and 'Refresh Data'. Below this, there are search options: 'Collective Search Help', 'Search Term', and 'Free search'. A 'Hit list' is displayed on the left, containing a table of employee data. The table has columns for 'Personnel number' and 'Name'. The data is as follows:

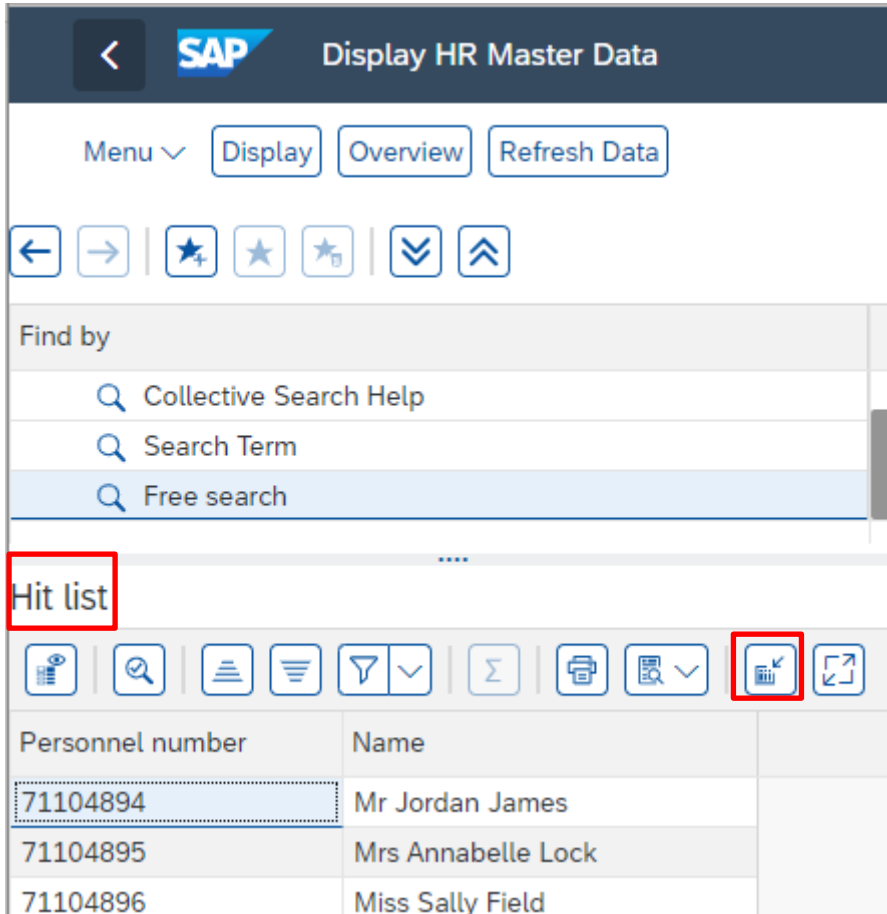
Personnel number	Name
71104894	Mr Jordan James
71104895	Mrs Annabelle Lock
71104896	Miss Sally Field
71104897	Ms Clara Bell
71104898	Mrs Beverley Bonnet
71104899	Mr Matthew Paint
71104900	Mr Matthew Paint
71104901	Mrs Goldy Locks
71104902	Mr Martin Mop
71104903	Mr Albert Bucket
71104904	Miss Carrie Cupboard
71104905	Ms Millie Marshall

To the right of the hit list, there are tabs for 'Personal Data', 'Work Contract Data', 'Payroll Data', 'Time Data Menu', and 'Travel Benefits Data'. The 'Personal Data' tab is active, showing a list of data categories with radio buttons: Personal data, Additional Personal Data, Addresses, Family Member/Dependents, SWF Qualifications, SWF Staff Details, Residence Status, and Qualifications. There is also a 'Period' section with radio buttons for 'Period', 'Today', 'All', 'From Today', 'Until Today', 'Curr. Period', 'Current Week', 'Current Month', 'Last Week', 'Last Month', and 'Current Year'. A 'Choose' button is located below the period options. At the bottom, there are input fields for 'Infotype:' and 'STY:'.

## Section 2.1 -.Hit 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)



The screenshot shows the SAP 'Display HR Master Data' interface. At the top, there is a navigation bar with a back arrow, the SAP logo, and the title 'Display HR Master Data'. Below this are buttons for 'Menu', 'Display', 'Overview', and 'Refresh Data'. A toolbar contains navigation and action icons. A 'Find by' section offers search options: 'Collective Search Help', 'Search Term', and 'Free search'. The 'Hit list' section is highlighted with a red box and contains a table of employee data. Above the table, another toolbar is visible, with the column configuration icon (a grid with a pencil and checkmark) highlighted by a red square.

Personnel number	Name
71104894	Mr Jordan James
71104895	Mrs Annabelle Lock
71104896	Miss Sally Field

- This will bring up a pop-up 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 **Continue** to save your selection.

Column Configuration

Displayed columns

<input type="checkbox"/>	Personnel subarea
<input type="checkbox"/>	Personnel subarea name
<input type="checkbox"/>	Employee group
<input type="checkbox"/>	Employee group name
<input type="checkbox"/>	Employee subgroup
<input type="checkbox"/>	Employee subgroup name
<input type="checkbox"/>	Organizational Unit
<input type="checkbox"/>	Organizational unit name
<input type="checkbox"/>	Position
<input checked="" type="checkbox"/>	Position name

Continue Cancel

The hit list now displays employee payroll number, employee name and employee position name.

SAP Display HR Master Data > ER1 (400) v

Menu > Display Overview Refresh Data Exit

Personnel No.:  Pers. Assgn:

Find by  
 Collective Search Help  
 Search Term  
 Free search

Hit list

Personnel ...	Name	Position name
71104894	Mr Jordan James	Teacher
71104895	Mrs Annabelle Lock	Teacher
71104896	Miss Sally Field	Supply Teacher
71104897	Ms Clara Bell	Teaching & Learning Assistant
71104898	Mrs Beverley Bonnet	Teaching & Learning Assistant
71104899	Mr Matthew Paint	Teaching & Learning Assistant
71104900	Mr Matthew Paint	Mid Day Supervisor
71104901	Mrs Goldy Locks	Mid Day Supervisor (Relief)
71104902	Mr Martin Mop	Cleaner
71104903	Mr Albert Bucket	Caretaker (Relief)
71104904	Miss Carrie Cupbo...	Caretaker
71104905	Ms Millie Marshall	Technician

Personal Data Work Contract Data Payroll Data Time Data Menu Travel Benefits Data > ..

Infotype Text Status

- Personal data
- Additional Personal Data
- Addresses
- Family Member/Dependents
- SWF Qualifications
- SWF Staff Details
- Residence Status
- Qualifications

Period

Period

From:  To:

Today  Current Week  
 All  Current Month  
 From Today  Last Week  
 Until Today  Last Month  
 Curr. Period  Current Year

Direct selection

Infotype:  STy:

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).

In this example clicked on Position Name column and ascending icon and employees' position names now in alphabetical order.

The screenshot shows the SAP 'Display HR Master Data' interface. At the top, there is a navigation bar with a back arrow, the SAP logo, and the title 'Display HR Master Data'. Below this is a menu bar with 'Menu', 'Display', 'Overview', and 'Refresh Data' buttons. A toolbar contains navigation and action icons. The 'Find by' section offers search options: 'Collective Search Help', 'Search Term', and 'Free search'. The 'Hit list' section features a toolbar with various icons, including an ascending sort icon (three lines sloping up) which is highlighted with a red box. Below the toolbar is a table with three columns: 'Personnel ...', 'Name', and 'Position name'. The 'Position name' column header is also highlighted with a red box. The table contains the following data:

Personnel ...	Name	Position name
71104904	Miss Carrie Cupboard	Caretaker
71104903	Mr Albert Bucket	Caretaker (Relief)
71104902	Mr Martin Mop	Cleaner
71104900	Mr Matthew Paint	Mid Day Supervisor
71104901	Mrs Goldy Locks	Mid Day Supervisor (Relief)
71104896	Miss Sally Field	Supply Teacher
71104894	Mr Jordan James	Teacher

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

When you have finished using SAP, please ensure you log off the system and close out of all windows.