

Software Application Training

WEST CHESTER UNIVERSITY



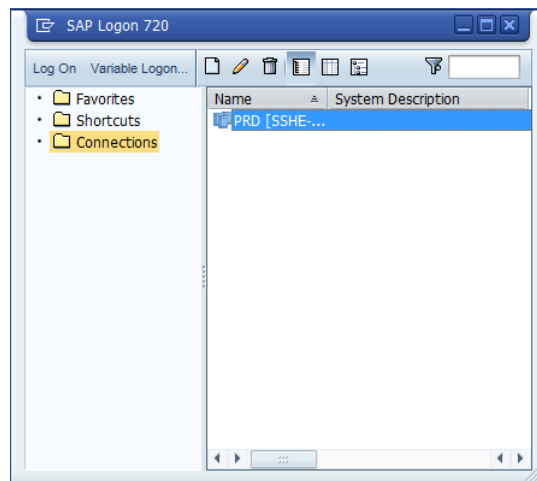
SAP Basic Navigation Tutorial

SAP Log On

In order to be able to log into the SAP system you should have the following icon on your desktop. If you do not have it and need access to the SAP system, you should contact the WCU Help Desk (x3350) to load the SAP GUI (Graphical User Interface) on your computer.



Clicking on this desktop icon will cause the following pop-up window to appear:



To enter the production (real live data) environment, highlight the PRD [SSHE-PRD] line; then double-click or click the Log On button. The following window will then appear:

The screenshot shows the SAP login interface. At the top, there are menu options: 'User', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main area is titled 'SAP' and contains a 'New password' section with fields for 'Client' (300), 'User' (highlighted in yellow), 'Password' (masked with asterisks), and 'Language'. To the right is an 'Information' section with the following details: Sytec FI/MM/HR/PY Prod System (PRD), Release: ECC 6.0 EHP 4 SP 6, and 300 - Production Client.

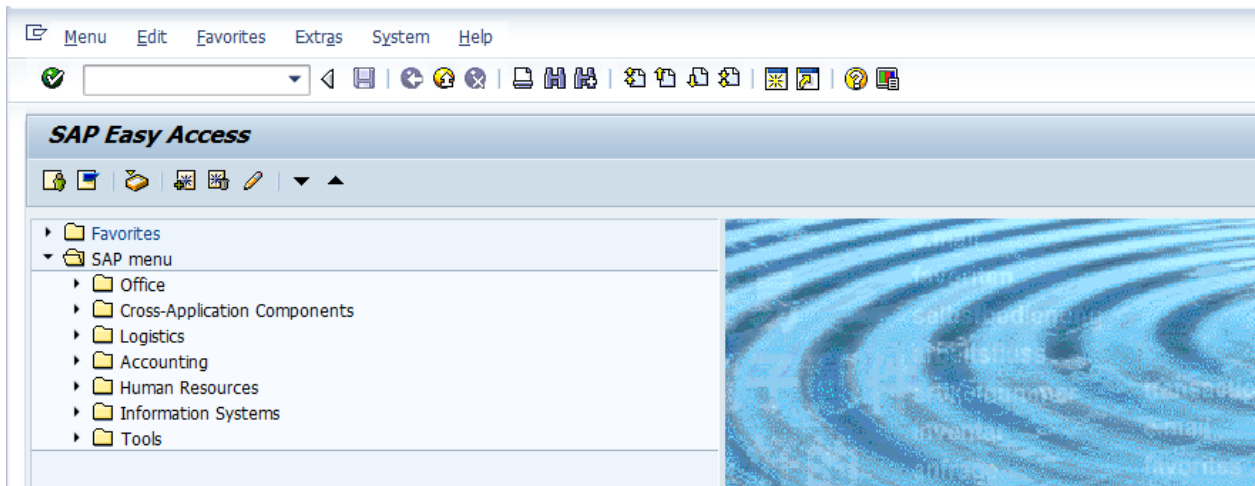
Enter your User ID and Password in the appropriate named fields. All WCU user ID's will start with 75. When entering your password type directly over the asterisks, you do not have to delete them.

Then click the green Checkmark  or hit enter.

The first time you logon to the system you will immediately be prompted for a new password. Passwords must be 7 characters long, they cannot begin with the first 3 digits of your User ID, and they must be changed every 30 days. When changing your password, you may not use the last 5 passwords you utilized previously.

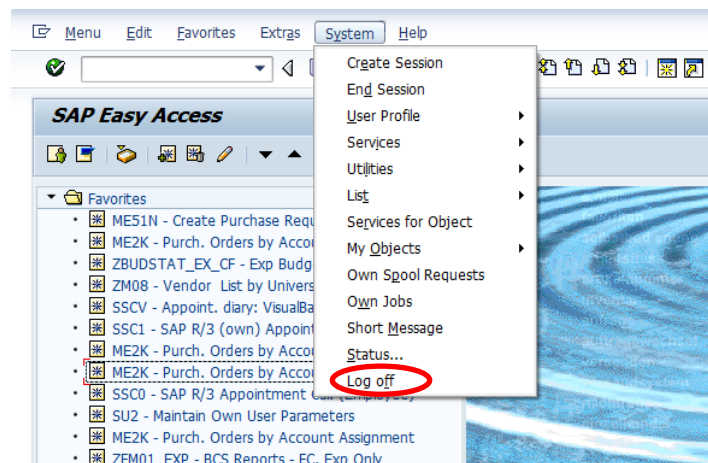
The screenshot shows a dialog box titled 'SAP' with a close button in the top right corner. It contains two text input fields: 'New Password' and 'Repeat Password'. Both fields are filled with asterisks. The 'Repeat Password' field is highlighted in yellow. Below the fields is an information icon (i) and the text 'Entry is Case-Sensitive'. At the bottom right, there are two buttons: a green checkmark and a red X.

This will then take you to the following screen which is the first SAP window from where you can navigate to the various SAP transactions.



How to Log Off

Click on System and then select Log Off.



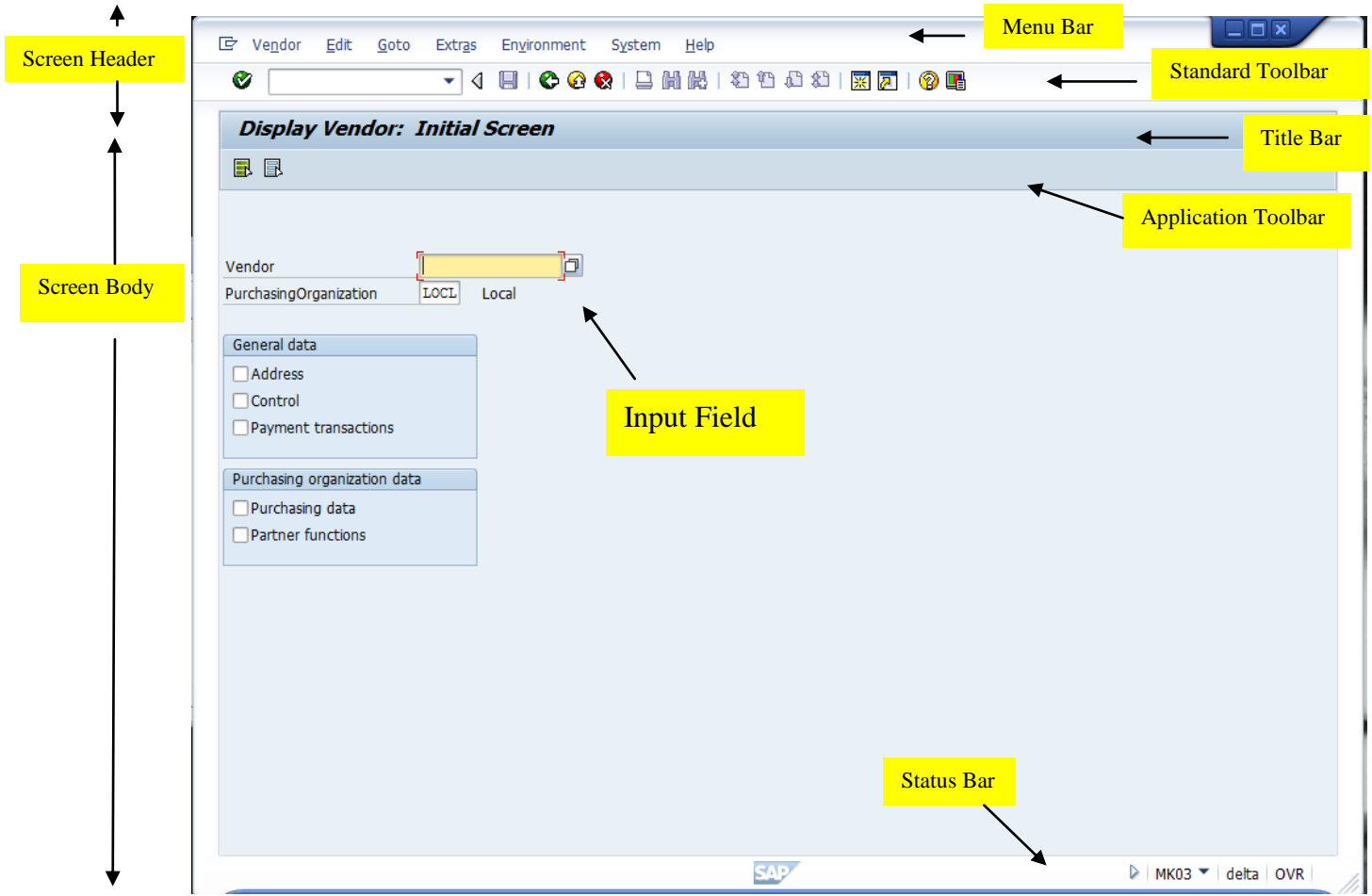
You may also click on the small X
your screen.

in the right corner of

The purpose of this document is to familiarize you with some of the basic tools and terminology utilized in navigating through the SAP system.

THE SAP WINDOW

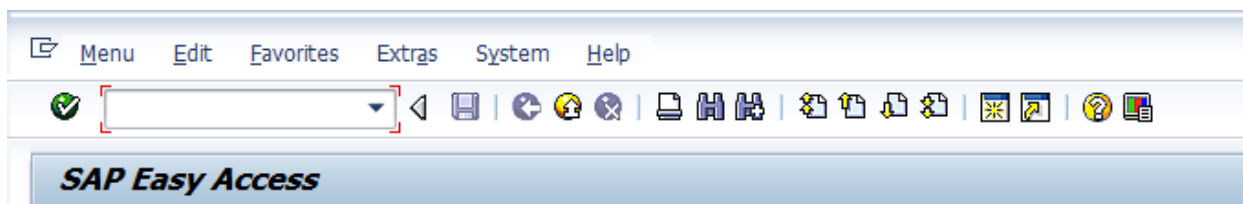
The SAP window is the user interface to the SAP System. The elements of a typical SAP window are shown below:



MENU BAR/TOOL BAR

The *Menu Bar* contains menu paths available for navigation from the current screen. The menu options vary according to screen or task. On the following screen, the available options include:

Menu Edit Favorites Extras System Help





To navigate a menu path, click on the desired option on the *Menu Bar* in order to view more menu options for that module area.

STANDARD TOOLBAR

The **standard toolbar**, located just below the menu bar, contains buttons/icons for performing common actions such as *Save, Enter, Back, Exit, Cancel, etc.* The toolbar also contains the *Command* field (see white rectangular box in red circle below) where transaction codes can be entered.
















If you are in a particular transaction and want to proceed to the next transaction without going back to the main menu, you can enter “/n” followed by the transaction code in the *command field*, then click .

The functions that can be performed with the toolbar will be dependent upon where you are in a particular transaction. For example, notice in the toolbar that the *Save* icon  is “grayed out”; you would not be able to *Save* in this instance. Other buttons may be “grayed out” at any given time depending on where you are in a particular transaction (i.e., what screen you are on).

A table summarizing the function of each button of the standard toolbar is presented on the next page. In addition, these buttons/icons are explained in further detail later in this course.

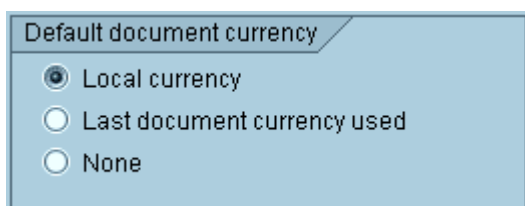
STANDARD TOOLBAR (Buttons/Functions)

Button	Name	Function
	Enter	Confirms the data you have selected or entered on the screen. Same function as the <code>Enter</code> key. Does not save your work.
	Command field	Allows you to enter commands, such as transaction codes.
	Save	Saves your work. Same function as <code>Save</code> in the <code>Edit</code> menu.
	Back	Returns you to the previous screen without saving your data. If there are required fields on the screen, these fields must be completed first.
	Exit	Exits the current function without saving. Returns you to the initial screen or main menu screen.
	Cancel	Exits the current task without saving. Same function as <code>Cancel</code> in the <code>Edit</code> menu.
	Print	Prints data from the current screen.
	Find	Searches for data required in the current screen.
	Find next	Performs an extended search for data required in the current screen.
	First page	Scrolls to the first page. Same function as the <code>CTRL + Page Up</code> keys.
	Previous page	Scrolls to the previous page. Same function as the <code>Page Up</code> key.
	Next page	Scrolls to the next page. Same function as the <code>Page Down</code> key.
	Last page	Scrolls to the last page. Same function as the <code>CTRL + Page Up</code> key.
	Create session	Creates a new SAP session. Same function as <code>Create session</code> in the <code>System</code> menu.
	Create shortcut	Allows you to create a desktop shortcut to any SAP report, transaction, or task if you are working with a Windows 32-bit operating system.
	F1 Help	Provides help on the field where the cursor is positioned.
	Layout menu	Allows you to customize the display options.

RADIO BUTTONS AND CHECKBOXES

To enter information in the SAP System, you must sometimes select among several options. In some cases, you can select only one option; in other cases, you can select more than one.

When you are limited to only one option, **radio buttons** identify the options:



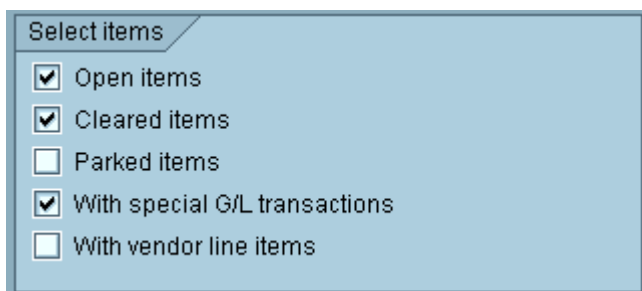
Default document currency

Local currency

Last document currency used

None

When you can select multiple items, options are identified by **checkboxes**:



Select items

Open items

Cleared items

Parked items

With special G/L transactions

With vendor line items

Choosing Options with Radio Buttons

- To select an option, click the radio button next to that option. The selected radio button is now filled in.
- To change your selection, click a different radio button. The original button is now empty and the new selection is filled in.
- To select a radio button using the keyboard, use the *Tab* key to move to the group of options. Use the arrow keys to move to the desired option, and press the spacebar.

Choosing Options with Checkboxes

- To select one or more options, click the checkbox next to each desired option. The selected checkboxes now contain a checkmark.
- To deselect a checkbox containing a checkmark, click it again. The checkmark disappears.
- To select a checkbox using the keyboard, use the *Tab* key to go to the group of options. Use the arrow keys to go to each desired option, and press the spacebar.
- To deselect a checkbox containing a checkmark, use the arrow keys to go to the option, and press the spacebar. The checkmark disappears.

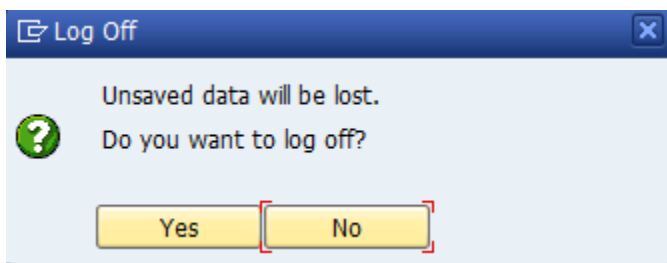
DIALOG BOXES

The SAP System displays dialog boxes when it:

- Requires more information before it can proceed
- Is providing information, such as messages or specific information about your current task

Before you can continue, you must choose an action from a dialog box. To choose an action, choose one of the buttons at the bottom of the dialog box.

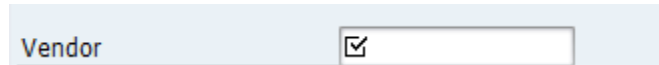
A sample dialog box is shown here:



When you end a task without saving your data, or you choose a function that may cause you to lose data, the SAP System usually displays a dialog box in which you are asked to confirm or cancel your action.

REQUIRED INPUT FIELDS

When you work in the SAP System, you will sometimes encounter input fields containing a checkmark icon. These are ***required input*** fields. An example is shown below:



The image shows a screenshot of a SAP input field. On the left, the text 'Vendor' is displayed. To its right is a rectangular input box. Inside the top-left corner of this box is a small square containing a checkmark icon, indicating that this field is required.

If the screen you are working in contains any required input fields, you must enter data in these input fields before you can proceed to the next screen or tab (if the screen is using tabs).

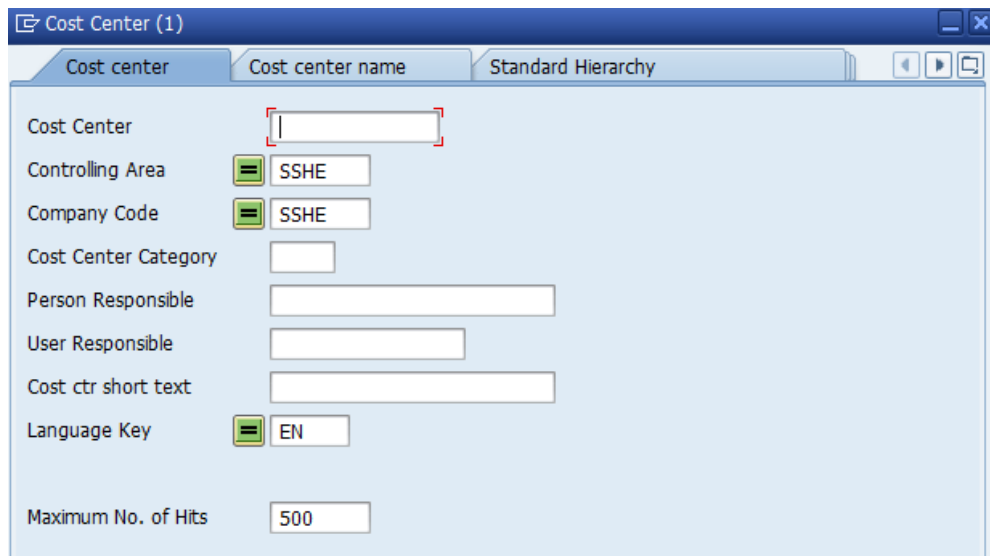
Generally, if a screen has no required input fields, you can go to the next screen or tab without entering data in any fields. Some screens, however, have required input fields that are not identified. This situation can occur when

- You enter data in an optional field that has required fields associated with it
- You need to enter data in one of several input fields
For example; freight can be delivered by a specific day or week. Neither the *Day* field nor the *Week* fields are identified as required input fields; however, you must complete one of the fields (not both).

When you choose *OK* to proceed to another screen, if you have not completed all the required input fields on a screen, the SAP System displays an error message in the status bar. At the same time, it places the cursor in the required input field so that you can make the necessary data entry.


TABS

Tabs enable you to enter, display, and alternate between multiple screens. In transactions containing multiple screens, they provide a clearer overview. In addition, tabs enable you to proceed from one tab page to the next without having completed all the data. To access a tab page, select the corresponding tab header.



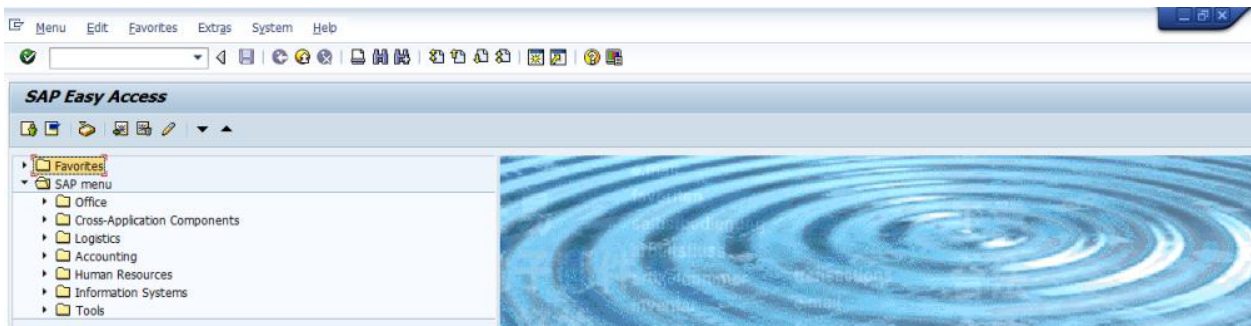
The screenshot shows the SAP Cost Center (1) transaction screen. The window title is "Cost Center (1)". The interface features a tabbed navigation system with three tabs: "Cost center", "Cost center name", and "Standard Hierarchy". The "Cost center" tab is currently selected and active. Below the tabs, there are several input fields and dropdown menus for data entry:

- Cost Center: An empty text input field.
- Controlling Area: A dropdown menu with "SSHE" selected.
- Company Code: A dropdown menu with "SSHE" selected.
- Cost Center Category: An empty text input field.
- Person Responsible: An empty text input field.
- User Responsible: An empty text input field.
- Cost ctr short text: An empty text input field.
- Language Key: A dropdown menu with "EN" selected.
- Maximum No. of Hits: A text input field containing the value "500".

- In some cases, you must complete all required input fields on a tab page before you can move to the next tab page.
- In the case of longer tab strips, not all of the tabs appear on the screen. The left and right arrows at the top of the tab strip allow you to scroll to all the tabs.
- If you choose the button at the right of the tab strip , the system displays a list of all the tabs on the tab strip. If you select a tab from this list, the selected tab page moves to the foreground.
- Tabs are arranged in order of importance or in the process order of the transaction.
- Tab headers can contain text, icons, or both.

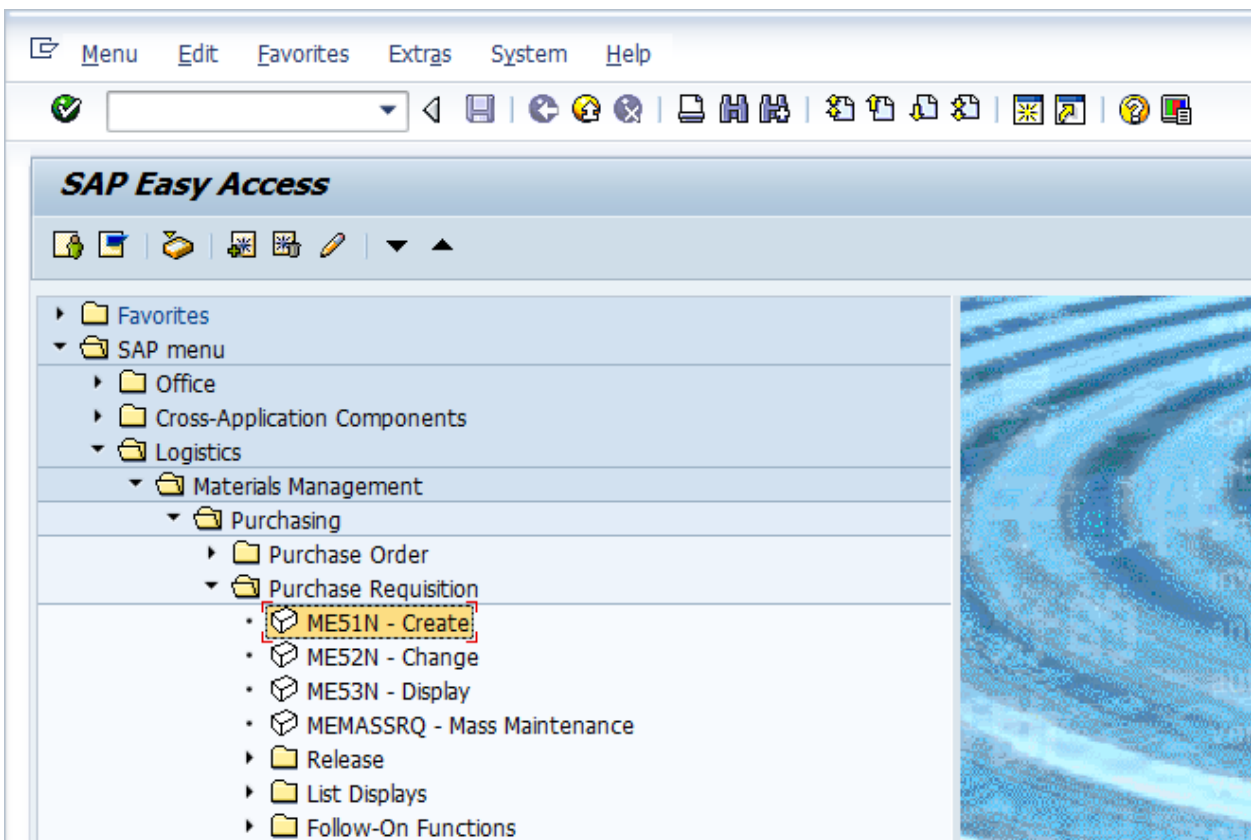
Features & Procedures

Once you have logged into SAP, you will be presented with a screen similar to this:



In order to reach a specific transaction, such as running a budget report or creating a purchase requisition, you will need to drill down to the lowest level.

Drilling down is achieved by clicking once on a right-pointing arrow.

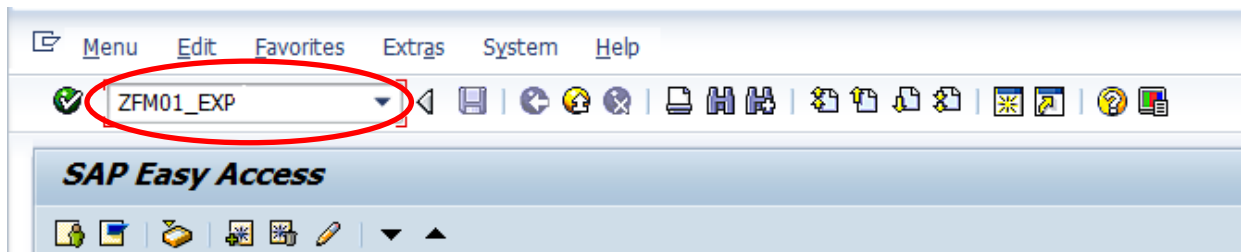


Each transaction can have multiple levels. The lowest level is indicated by the cube symbol. Double clicking the lowest level will take you to that transaction.


HOW TO ENTER A TRANSACTION CODE

A transaction code is a faster way that can be used to reach a transaction screen without using a menu path. It is an alphanumeric value that identifies a “transaction”, such as FB60, which is used for Entering a Vendor Invoice, or ZFM01_EXP which will request a budget status report.

On the following screen, the *Command Field* has been circled in red. This is the place where you can enter the transaction code:



After entering a transaction code, hit <Enter> or click the Green Checkmark to proceed to the transaction.

NOTE: If you are already in a particular transaction and want to proceed to the next transaction without going back to the main menu, you can enter “/n” followed by the subsequent transaction code in the *command field*, then click .

NAVIGATION ARROWS

The navigation options in the SAP R/3 System are intended to give the user as much freedom as possible when moving between screens and tasks. To support this, a number of standard functions (such as "Back", "Exit", and "Cancel") are offered.

Note the green checkmark and colored arrows on the following screen (green, yellow and red).



The functionality of each of these icons is explained as follows:



Green Checkmark

This icon is used as the **ENTER** key that allows you to continue to the next step. It is used when you require the system to validate your field entries and then move to the next function, or screen, in a system task. **This key does NOT save the information that you enter. For that, you will have to use the SAVE icon.**



Green Arrow

This icon is used as the **BACK** key. It is typically used to go back to the previous screen or menu level.



Yellow Arrow

This icon is used as the **EXIT** key. It is used when you want to exit the current menu level or system task **without saving** the data.

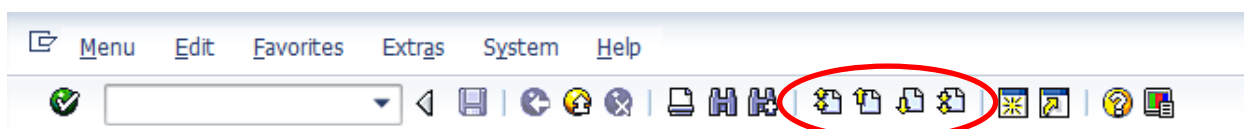


Red X

This icon is used as the **CANCEL** key. It is used when you want to cancel the data you entered in the current system task.

PAGING

You can use the four paging buttons to move through a long list or report.



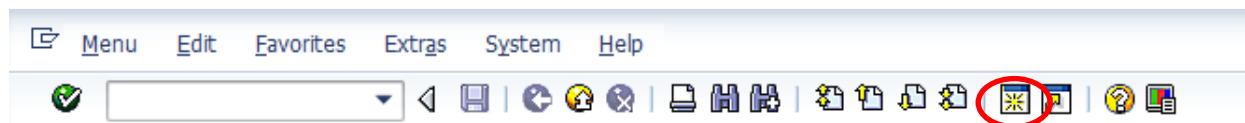
To move:

- A page up: click on the single up arrow
- A page down: click on the single down arrow
- To the first page: click on the up double arrows
- To the last page: click on the down double arrows

CREATING A NEW SESSION

You can work with multiple sessions (up to 6) of SAP. A session is equivalent to a window. What this feature allows is to have two, or more, windows open at the same time. For example, you can use one window to work on the transaction “Create an invoice”. Simultaneously, you can use the other window to go to another transaction to check the address of the vendor, without closing the first window.

The following screen highlights the icon that is used to create a new session:



To create a new window:

- ❑ Click on the icon highlighted by the red circle on the above screen

This will create a new window. You can switch between the two windows, the old and the new, by:

- ❑ Pressing the <ALT>& <TAB> keys simultaneously to move to the other window(s)

CREATING A FAVORITE

A favorite is just like a bookmark in a Browser, which enables you to reach a transaction without using a menu path or typing in a transaction code. You can add multiple, frequently used, transactions to your list of favorites so that you can reach your destination quickly without having to remember either the menu path or the transaction code.

To add a favorite:

- ❑ Navigate to the transaction code that you want to add to your favorites and highlight it by clicking on it once
- ❑ Click on *Favorites* on the menu bar
- ❑ Click on *Add*

You may also click and drag the transaction into your favorites.

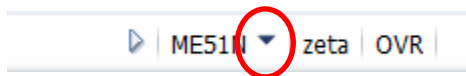
STATUS BAR

The *Status Bar* is located at the bottom of the SAP screen. It displays important system messages, such as errors and completion of transactions, as well as other session information. The example below shows the message generated by the system when a requisition was saved:



The message on the left hand side indicates that the requisition was created and what document number it was assigned.

The information on the right hand side of the status bar indicates the transaction code currently being used, the name of the server, and whether you are in overwrite keyboard mode (OVR) or insert keyboard mode (INS).



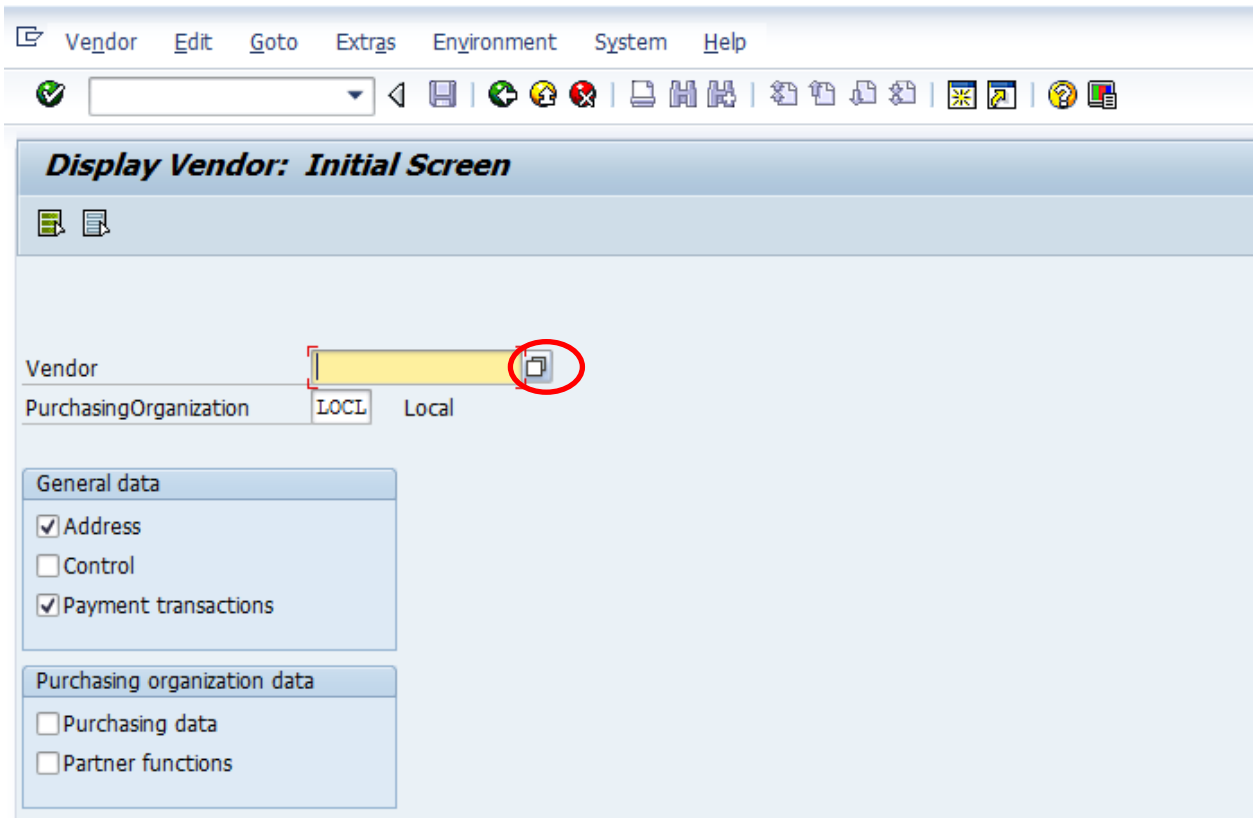
To change what information is displayed, click on the drop-down arrow (circled above) to open the selection list dialog.

S <u>y</u> stem	PRD (1) 300
C <u>l</u> ient	300
U <u>s</u> er	75DLAVERTY
P <u>r</u> ogram	SAPLMGUI
● T <u>r</u> ansaction	ME51N
R <u>e</u> sponse Time	1482 ms
I <u>n</u> terpretation Time	189 ms
R <u>o</u> und T <u>r</u> ips/Flushes	6/5

FIELD ENTRY SEARCHES

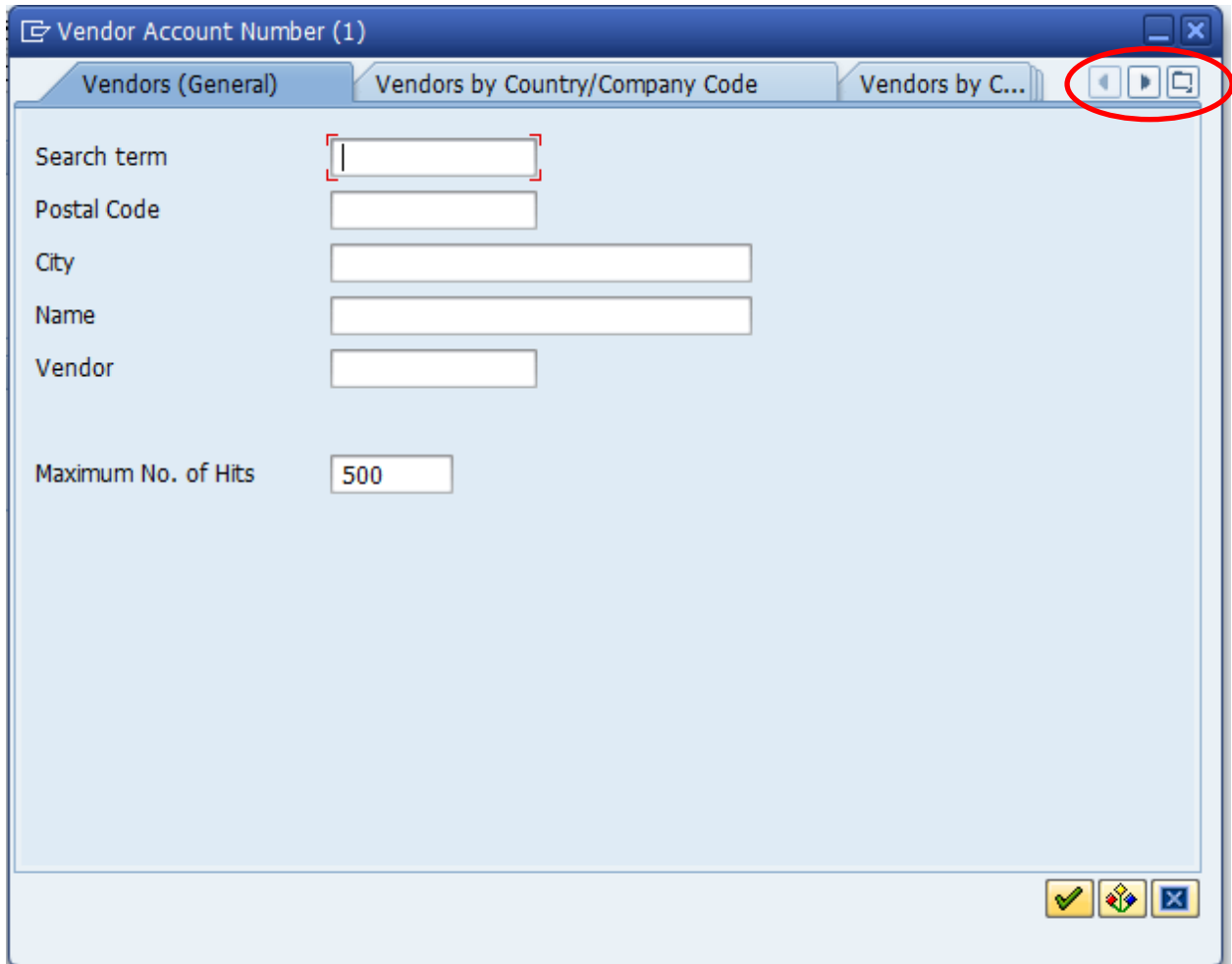
When entering data, you will at times need to conduct a search to determine the appropriate data to enter in a field. There are a few ways that this can be accomplished.

In the example below, a Vendor Number is required. If you do not know the number, a search facility is available for this field. When your cursor is in the field, the search button will appear immediately to the right when available. See the red circle below.



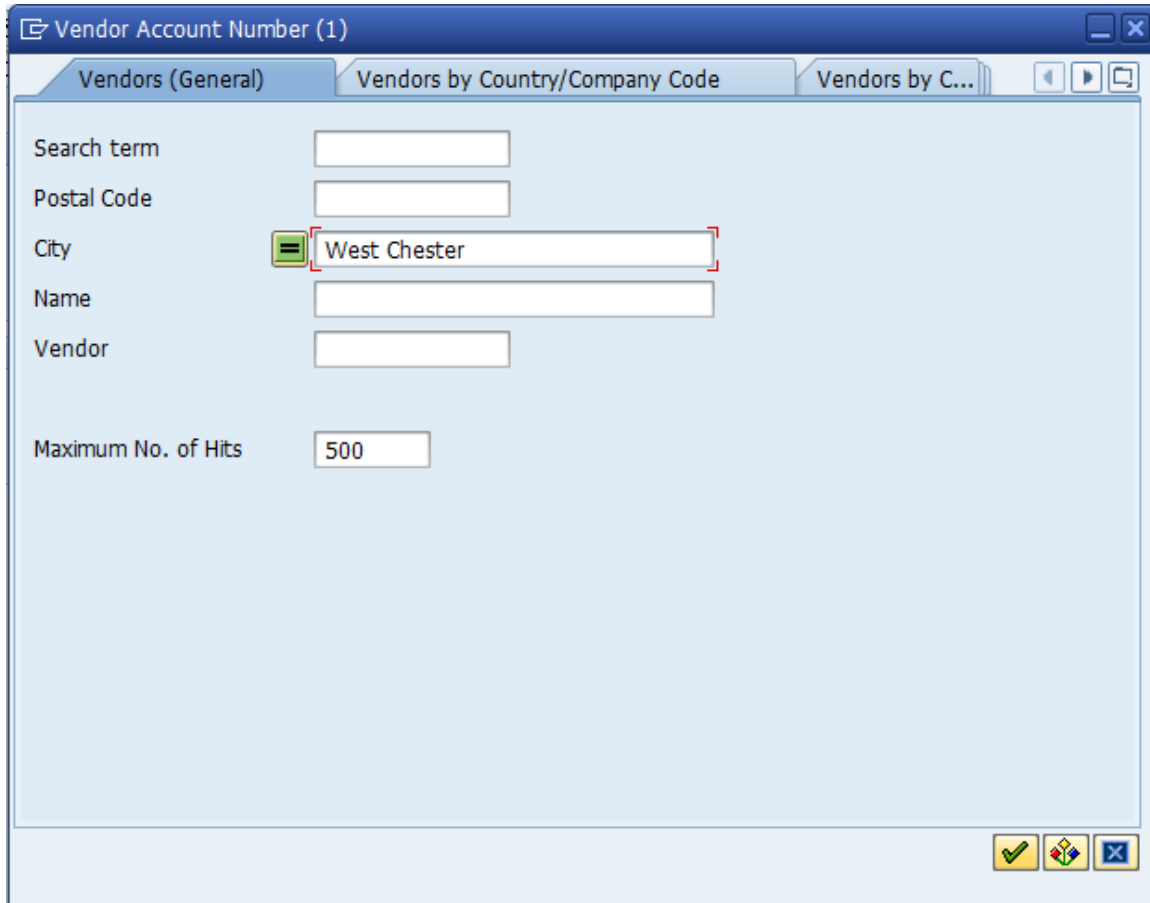
After clicking the search button (or pressing F4), a pop-up window similar to the example below, will be displayed. This window provides options for conducting your search. Often, there are several tabs available, which give different search options.

Note the three buttons in the upper right corner. The left arrow will bring the previous tab to the front, the right arrow brings the next tab to the front, and the selection list displays a listing of all available tabs and allows you to choose which to bring to the front.



The screenshot shows a window titled "Vendor Account Number (1)". It features three tabs: "Vendors (General)", "Vendors by Country/Company Code", and "Vendors by C...". The "Vendors (General)" tab is active. The window contains several input fields: "Search term" (with a red box around it), "Postal Code", "City", "Name", "Vendor", and "Maximum No. of Hits" (set to 500). In the upper right corner, three buttons (left arrow, right arrow, and a selection list icon) are circled in red. At the bottom right, there are three icons: a green checkmark, a multi-colored square, and a blue 'X'.

Once you have chosen the tab that corresponds to your desired search method, enter data in the fields to limit your search. You may complete all, some, or none of the fields. If no fields have been completed, the entire list of possible selections will be returned. In the example below, only vendors with a West Chester address will be returned.



Vendor Account Number (1)

Vendors (General) Vendors by Country/Company Code Vendors by C...

Search term



Postal Code



City

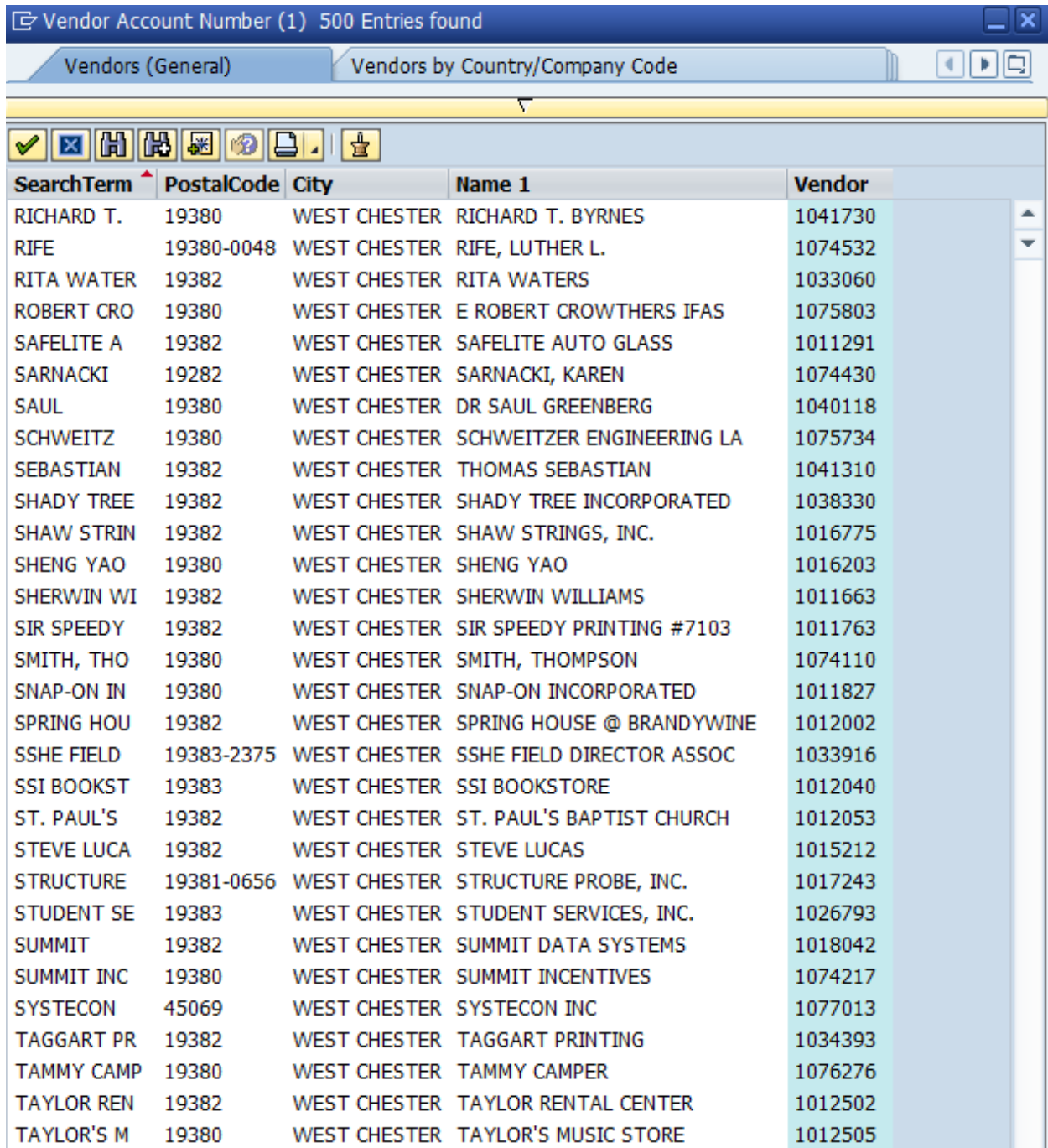
Name

Vendor

Maximum No. of Hits

Click the green check mark  to execute the search. To cancel and close the pop-up window, click the blue X .

Sample search results are shown below. When the desired item is located, double-click it. Or highlight it by clicking on it once and then clicking the green check mark . If you are not satisfied with the search results, click the blue X  to close the window.



The screenshot shows a SAP window titled "Vendor Account Number (1) 500 Entries found". The window has two tabs: "Vendors (General)" and "Vendors by Country/Company Code". Below the tabs is a toolbar with icons for checkmark, close, print, refresh, search, and help. The main area displays a table of search results with the following columns: SearchTerm, PostalCode, City, Name 1, and Vendor. The table contains 30 rows of data, all with "WEST CHESTER" as the city.

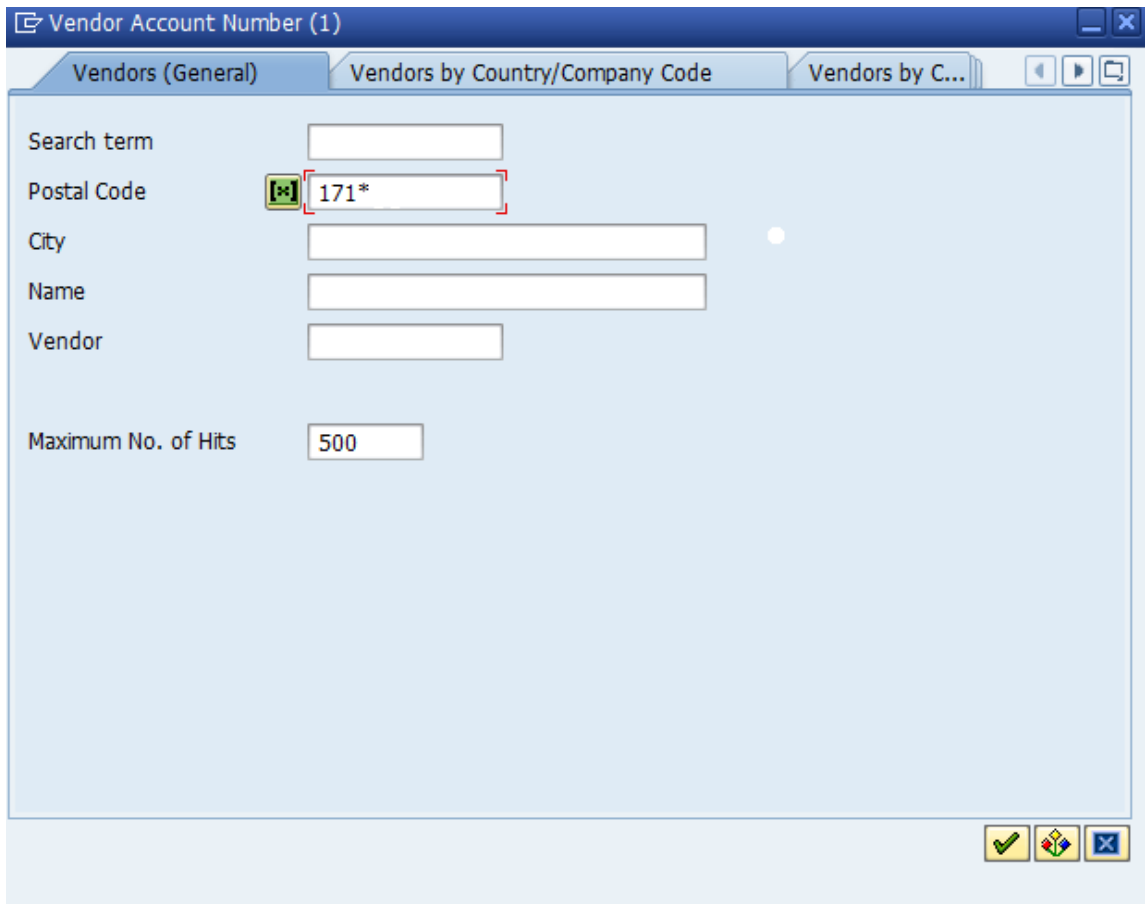
SearchTerm	PostalCode	City	Name 1	Vendor
RICHARD T.	19380	WEST CHESTER	RICHARD T. BYRNES	1041730
RIFE	19380-0048	WEST CHESTER	RIFE, LUTHER L.	1074532
RITA WATER	19382	WEST CHESTER	RITA WATERS	1033060
ROBERT CRO	19380	WEST CHESTER	E ROBERT CROW/THERS IFAS	1075803
SAFELITE A	19382	WEST CHESTER	SAFELITE AUTO GLASS	1011291
SARNACKI	19282	WEST CHESTER	SARNACKI, KAREN	1074430
SAUL	19380	WEST CHESTER	DR SAUL GREENBERG	1040118
SCHWEITZ	19380	WEST CHESTER	SCHWEITZER ENGINEERING LA	1075734
SEBASTIAN	19382	WEST CHESTER	THOMAS SEBASTIAN	1041310
SHADY TREE	19382	WEST CHESTER	SHADY TREE INCORPORATED	1038330
SHAW STRIN	19382	WEST CHESTER	SHAW STRINGS, INC.	1016775
SHENG YAO	19380	WEST CHESTER	SHENG YAO	1016203
SHERWIN WI	19382	WEST CHESTER	SHERWIN WILLIAMS	1011663
SIR SPEEDY	19382	WEST CHESTER	SIR SPEEDY PRINTING #7103	1011763
SMITH, THO	19380	WEST CHESTER	SMITH, THOMPSON	1074110
SNAP-ON IN	19380	WEST CHESTER	SNAP-ON INCORPORATED	1011827
SPRING HOU	19382	WEST CHESTER	SPRING HOUSE @ BRANDYWINE	1012002
SSHE FIELD	19383-2375	WEST CHESTER	SSHE FIELD DIRECTOR ASSOC	1033916
SSI BOOKST	19383	WEST CHESTER	SSI BOOKSTORE	1012040
ST. PAUL'S	19382	WEST CHESTER	ST. PAUL'S BAPTIST CHURCH	1012053
STEVE LUCA	19382	WEST CHESTER	STEVE LUCAS	1015212
STRUCTURE	19381-0656	WEST CHESTER	STRUCTURE PROBE, INC.	1017243
STUDENT SE	19383	WEST CHESTER	STUDENT SERVICES, INC.	1026793
SUMMIT	19382	WEST CHESTER	SUMMIT DATA SYSTEMS	1018042
SUMMIT INC	19380	WEST CHESTER	SUMMIT INCENTIVES	1074217
SYSTECON	45069	WEST CHESTER	SYSTECON INC	1077013
TAGGART PR	19382	WEST CHESTER	TAGGART PRINTING	1034393
TAMMY CAMP	19380	WEST CHESTER	TAMMY CAMPER	1076276
TAYLOR REN	19382	WEST CHESTER	TAYLOR RENTAL CENTER	1012502
TAYLOR'S M	19380	WEST CHESTER	TAYLOR'S MUSIC STORE	1012505

The result of either of the two methods above will be the entry field being populated with the selected data.

The screenshot shows the SAP 'Display Vendor: Initial Screen' interface. At the top, there is a title bar with a folder icon and the text 'Display Vendor: Initial Screen'. Below the title bar is a toolbar with a green checkmark icon, a dropdown menu, a left arrow, a save icon, a refresh icon, a home icon, and a close icon. The main content area has a header with the title 'Display Vendor: Initial Screen' and two icons (a list icon and a document icon). Below the header, there are two input fields: 'Vendor' with the value '1012040' and 'PurchasingOrganization' with the value 'LOCL' and the text 'Local' to its right. Below these fields are two expandable sections: 'General data' and 'Purchasing organization data'. The 'General data' section is expanded and contains three checkboxes: 'Address' (checked), 'Control' (unchecked), and 'Payment transactions' (checked). The 'Purchasing organization data' section is also expanded and contains two checkboxes: 'Purchasing data' (unchecked) and 'Partner functions' (unchecked).

USING A “WILD CARD” IN THE FIELD ENTRY SEARCH

While conducting a field entry search, you can use an asterisk (*) as a wild card character to help expand the search. In the example below, the vendor number search is being limited to vendors within a zip code range. Instead of entering a complete five-digit zip code, only the first three digits were entered followed by the * wild card.



The screenshot shows a SAP dialog box titled "Vendor Account Number (1)". It has three tabs: "Vendors (General)", "Vendors by Country/Company Code", and "Vendors by C...". The "Vendors (General)" tab is active. The dialog contains several input fields:

- Search term:
- Postal Code: (A green icon with a magnifying glass is to the left of the input field.)
- City:
- Name:
- Vendor:
- Maximum No. of Hits:

At the bottom right of the dialog, there are three icons: a green checkmark, a multi-colored diamond, and a blue 'X'.

This will return all vendors whose zip code begins with those digits.

SearchTerm	PostalCode	City	Name 1	Vendor
GARN	17101	HARRISBURG	CLERK OF COURT, FINES & C	4000052
GENERAL CO	17101	HARRISBURG	COMMONWEALTH OF PA	1040488
GENERAL CO	17101	HARRISBURG	COMMONWEALTH OF PENNSYLV	1062196
GOODWILL I	17101	HARRISBURG	GOODWILL INDUSTRIES	1067812
HARRISBURG	17101	HARRISBURG	HARRISBURG HILTON & TOWER	1003469
HARRISBURG	17102	HARRISBURG	HARRISBURG SCHOOL DISTRIC	1016108
HAWKINS, H	17101	HARRISBURG	HAWKINS, HEIDI	1056187
HILTON HOT	17101	HARRISBURG	HILTON HARRISBURG & TOWER	1014855
HOOVER	17102	HARRISBURG	GERALD HOOVER	1054452
INSERVCO I	17101	HARRISBURG	INSERVCO INSURANCE SERV	1027544
INTEGRATED	17101	HARRISBURG	INTEGRATED CONTRACTORS, L	1019051
J P LILLEY	17102	HARRISBURG	J P LILLEY INC	1017048
J.P. LILLE	17102	HARRISBURG	J P LILLEY & SON INC	1006838
JOURNAL PU	17101	HARRISBURG	JOURNAL PUBLICATIONS	1006824
KAM CLEMEN	17102	HARRISBURG	KAM CLEMENTS	1016452
KAREN BATI	17101	HARRISBURG	KEREN BATIVVOY	1016572
KATHY CUNN	17102	HARRISBURG	KATHY CUNNINGHAM	1032756
KEYSTONE	17101	HARRISBURG	KEYSTONE RESEARCH CENTER	1033900
KEYSTONE P	17102	HARRISBURG	KEYSTONE PROGRESS	1075153
LGBT CENT.	17101	HARRISBURG	LGBT CENTER COALITION	1077636
LYNCH	17102	HARRISBURG	JEFF LYNCH	1060577
MCI WORLD	17101	HARRISBURG	MCI WORLD COM COMMUNICATIO	1079739
NASW	17102	HARRISBURG	NATIONAL ASSO. OF SOCIAL	1057800
NASW-PA	17102	HARRISBURG	NASW-PA	1023457
NEXT	17101	HARRISBURG	NEXT MAGAZINE	1040266
ORIGINAL	17101	HARRISBURG	ORIGINAL COPY SHOP AND QU	1015669
PA	17101	HARRISBURG	PA BUS CNCL	1077409
PA	17101	HARRISBURG	PENNSYLVANIA LEGISLATIVE	1063325

The wild card can be added at the beginning, middle, or end of your search term. You can also use multiple wild cards within a search term.

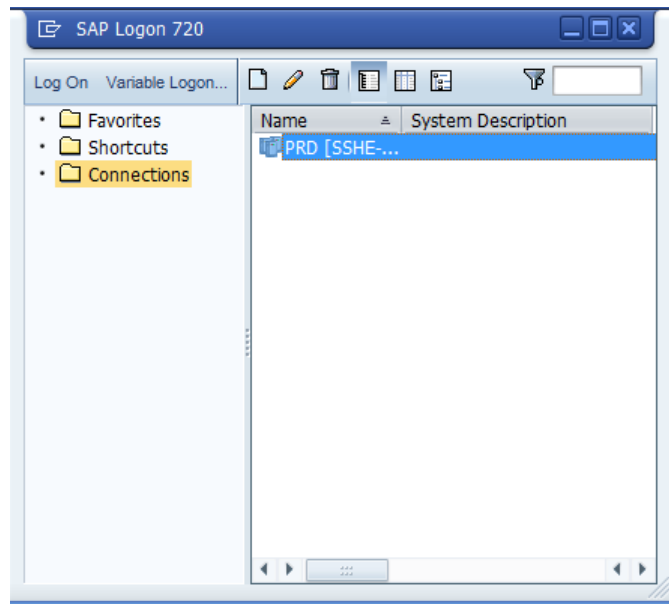
To sort the result set, just click on the column heading – a small red triangle will indicate that the column has been sorted.

SearchTerm	PostalCode	City	Name 1	Vendor
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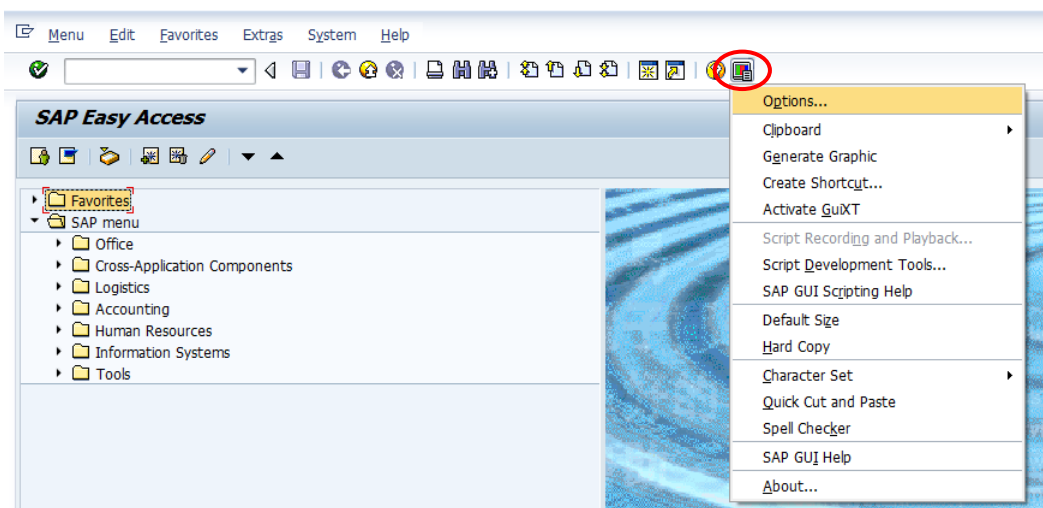
SAP Layout Change

You can change the appearance of the SAP layout by doing the following:

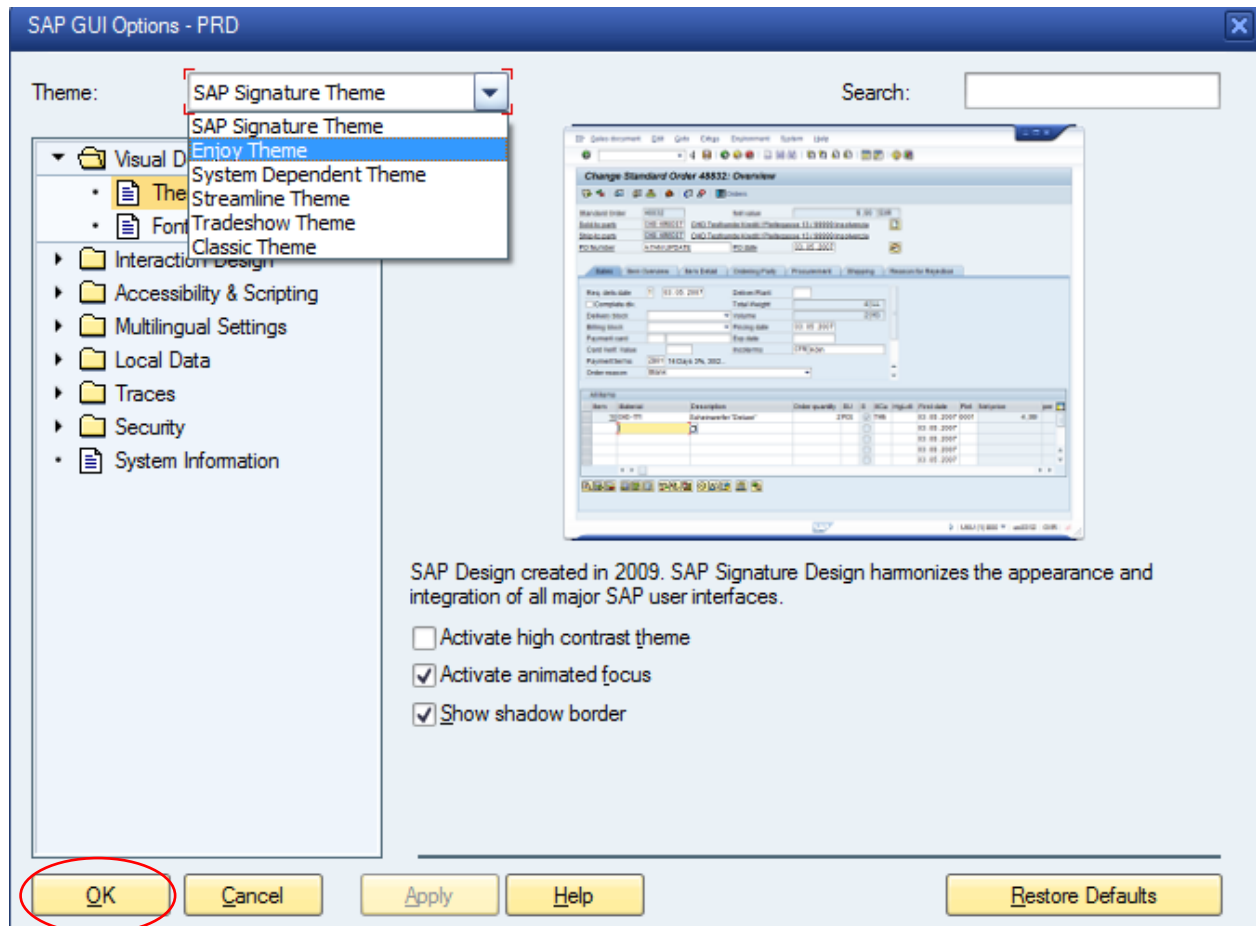
1. Open PRD and Log-in



2. Click the “customize local layout” button, then click “options” on the drop down menu:



3. Click the drop down arrow in the theme box and select “Enjoy Theme”



4. Click “OK” and close out of SAP. The next time you log-in, the layout will revert back to the old appearance.

NOTES:

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For assistance, call x3350.