SAP NAVIGATION

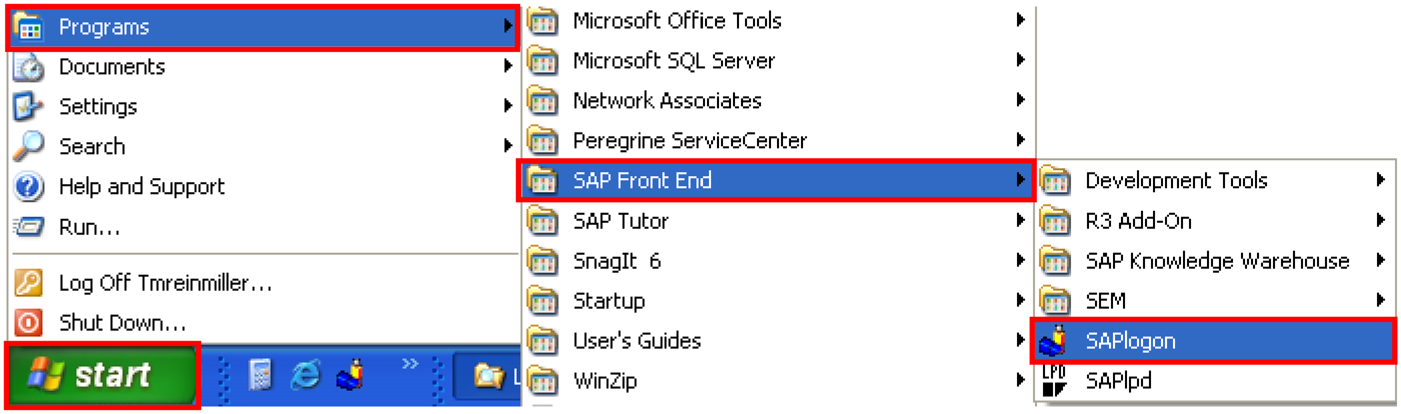
QUICK REFERENCE CARD

Table of Contents:

LOG ON TO THE SAP SYSTEM

To log into the SAP system:

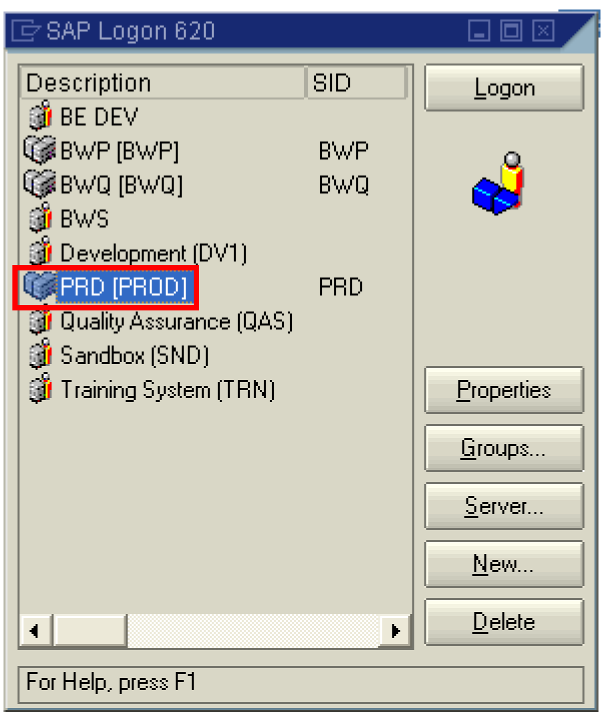
<u>Step 1.</u> Click Start > Programs > SAP Front End > SAP Logon.



<u>NOTE:</u> The SAP Logon screen can also be accessed by double-clicking the 

icon on the main Windows desktop.

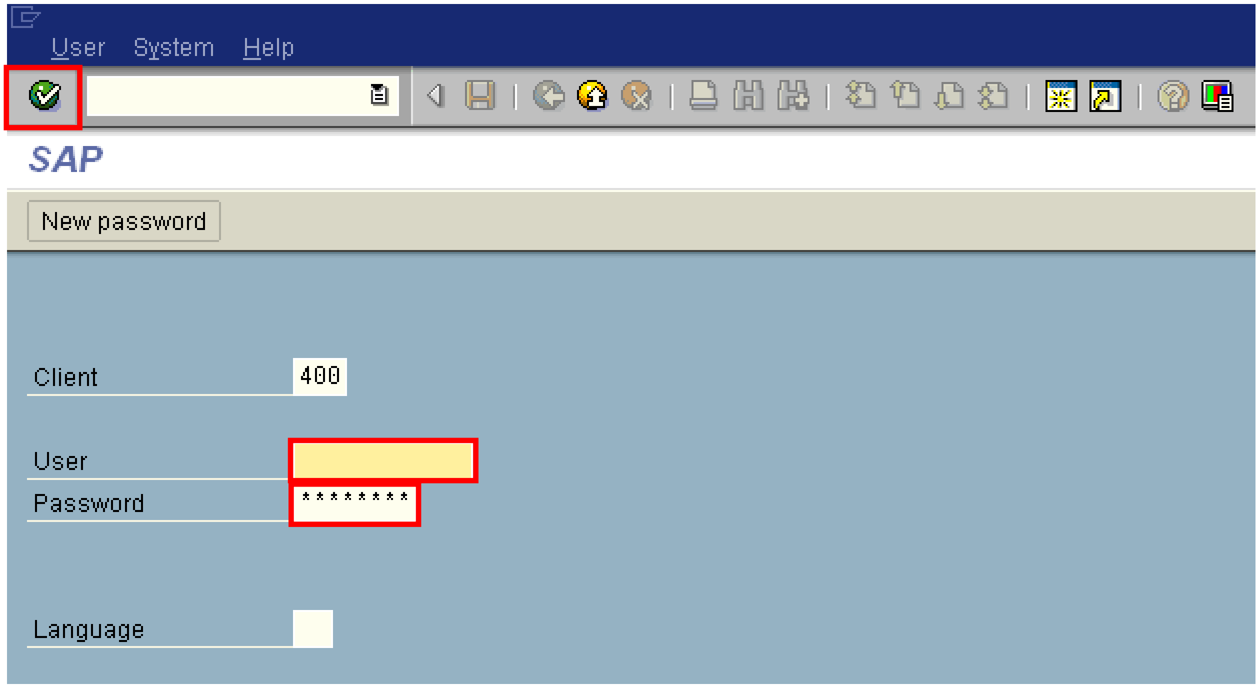
<u>Step 2.</u> Double-click the client you wish to log into (highlighted below):



Step 3. Enter the following fields in the SAP login screen (highlighted below):

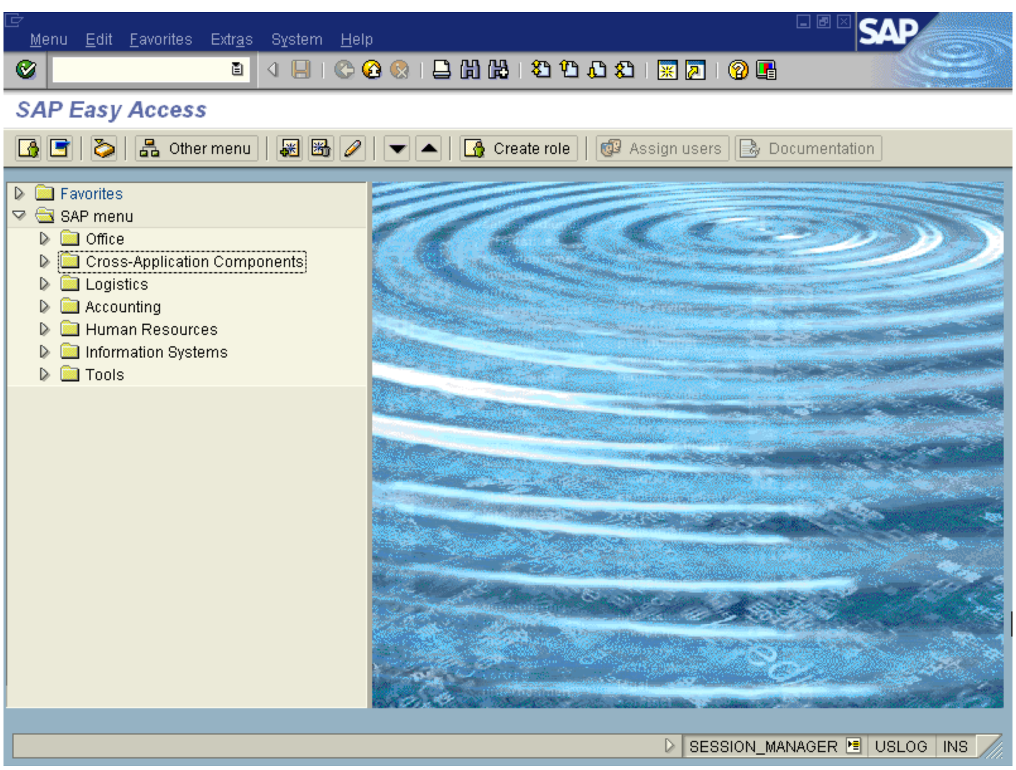
a. Type your user ID in the "User" field.

b. Type your password in the "Password" field.



Step 4. Click the  button (highlighted above).

The SAP Easy Access screen will appear as follows:

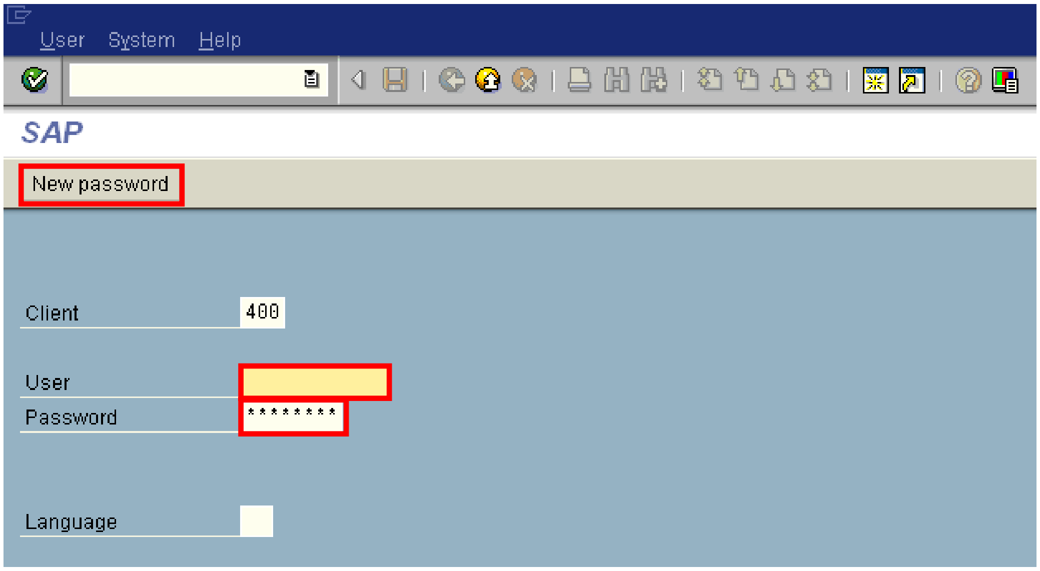


CHANGE YOUR PASSWORD

You can change your password up to once per day. (You will also be prompted to change your password every 45 days).

To change your password:

Step 1. Click the New password button AFTER entering your User ID and password (highlighted below).



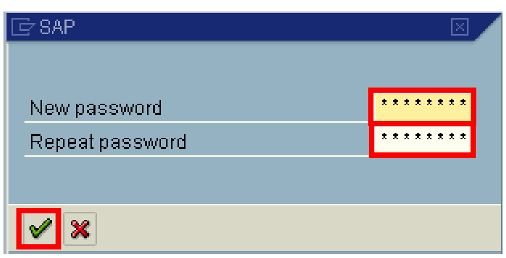
Step 2. Enter the following fields in the password pop-up (shown below):

a. Enter a new password in the "New password" field.

b. Press the tab key.

c. Enter the new password again in the "Repeat password" field. (This must be the same password you entered in Step a).

Step 3. Click the button.



Password Rules:

- *Passwords must be 8 characters long*
- *One character must be numeric*
- *It cannot be the same as your user Id*
- *The new password cannot be the same as the previous 5 passwords*
- *You will be prompted to change your password every 45 days*

SAP SYSTEM MESSAGES/INFORMATION

The SAP status bar at the bottom of the screen is actually broken down into two parts. These two parts are described below.

LEFT HALF – displays system messages. There will be three types of messages displayed on the status

Information messages – displayed in GREEN (select the button to clear).

Example: Save your entries

Warning messages – displayed in YELLOW (select the button to clear).

Example: Record valid from 01/01/2003 to 12/31/9999 delimited at end

Error messages – displayed in RED (correct the error or select the [cancel] button).

Example: Make an entry in all required fields

RIGHT HALF – displays system and logon information (see figure 6):

PRD (2) (400)	USAPP01	INS

The "PRD" is the system number.

The "(2)" is the session number (sessions will be defined later in this chapter).

The "USAPP01" is the name of the application server.

"INS" means that this user is currently in the "insert" not, "overwrite" mode (to "toggle" to the overwrite mode, the user would single click on the "INS" to change the mode to "OVR" which means overwrite).

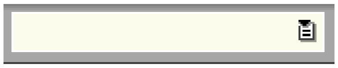
The button is used to view addition information on the system and the user's login. This information is displayed below:

✔ System	PRD (2) (400)
Host name	USAPP01
Client	400
User	SRHORN
Program	SAPLSMTR_NAVIGATION
Transaction	SESSION_MANAGER
Response time	0.125
Interpretation time	0.000
Round trips/Flushes	2/0

SAP BUTTONS / SCREEN FEATURES

The table below provides a summary of the most commonly used SAP buttons and screen features.

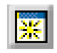
Button / Screen Feature:	Name:	Used For:
	Enter	Used to confirm entered information and to clear messages.
	Save	Used to save entered information.
	Back	Used to move to the previous screen.
	Exit	Used to exit the area of the system you are currently in.
	Cancel	Used to cancel or stop what you are currently trying to do. Often used to clear error messages.
	Create a new session.	Used to open a new “window” to the SAP system (discussed later in this chapter).
	Help	Used to get SAP’s help or documentation on a particular field or screen feature.
or	Possible Entries	Used to get the picklist of possible values for the selected field.
	Create	Used to create new entries or records.
	Change	Used to change an existing entry or record.
	Display	Used to display/view an existing entry or record.
	Copy	Used to copy an existing entry or record.
	Delimit	Used to change the end date of an existing entry or record.
	Delete	Used to delete an existing entry or record (used with caution).
	Overview	Used to view a list of all entries or records.
	Print	Used to print the data displayed on the current screen.

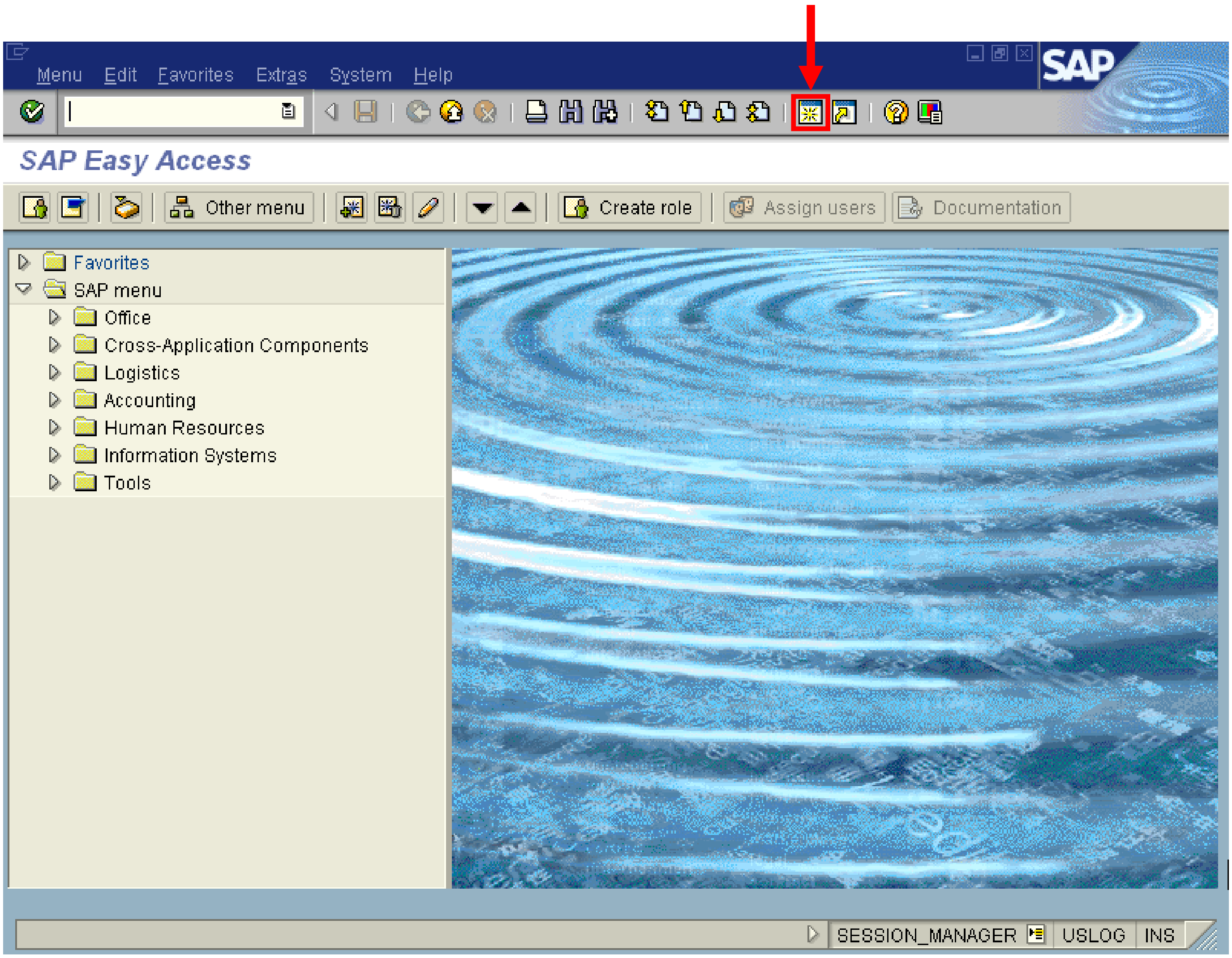
Button / Screen Feature:	Name:	Used For:
	Details	Used to view the “details” or “drill down” for the selected entry.
	Execute	Used to execute an application, program, or report from an SAP screen.
	Find	Used to find an entry in a screen or table that contains many entries or records.
	Command Field	Used for entering transaction codes (discussed in the next section). The command field will appear on every screen in the SAP system.
	SAP Menu	Used to close open (or expanded) folders on the SAP menu.
	Required Field	Used to indicate that a field is a required entry.

OPEN A NEW SESSION

A session is an instance of a SAP window. If you have additional tasks to perform or if one session is responding slowly, you can switch to another session that is already open. You can have a maximum of 6 sessions open at a time (2 are recommended).

To open an additional session:

Step 1. At the SAP Easy Access screen, click the  button (highlighted below).



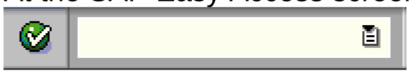
Step 2. Press the “Alt-Tab” keys to switch between the open sessions.

NOTE: A session can be closed using the  *button (top right corner of the screen) or by selecting “System > End Session” from the SAP menu.*

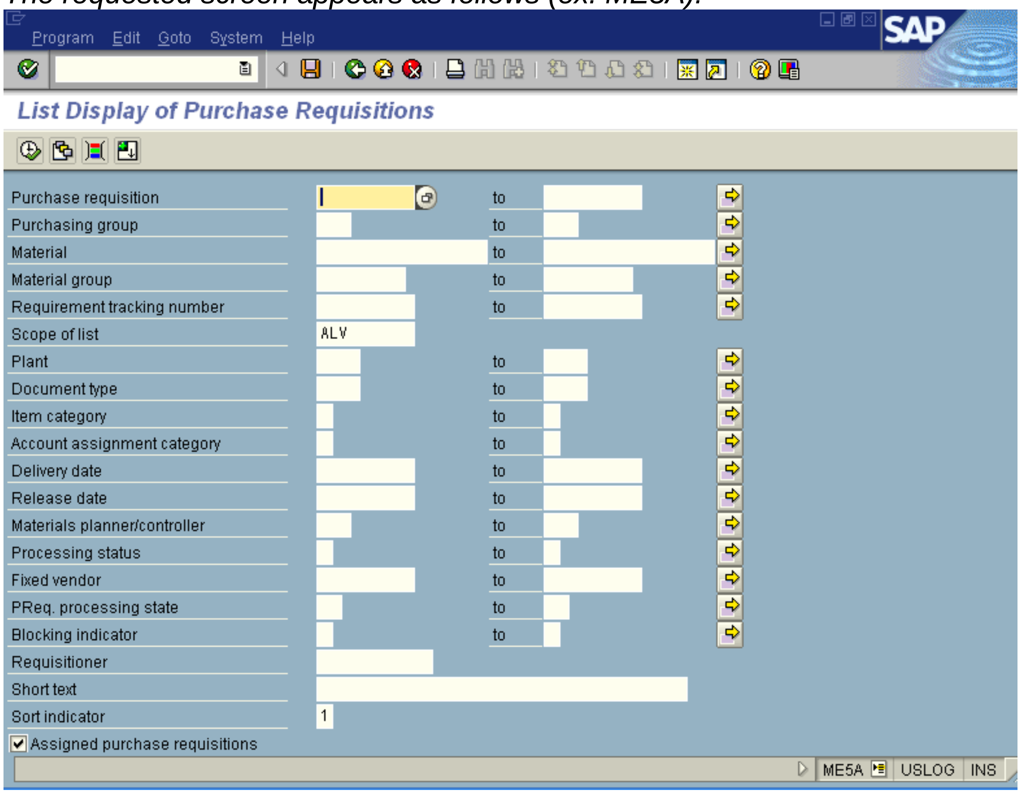
USE TRANSACTION CODES

A transaction code is a way to access a SAP screen. The SAP Easy Access screen is the only screen that does not require using a prefix in front of a transaction code.

To use a transaction code:

Step 1. At the SAP Easy Access screen, type the desired transaction code (ex: ME5A) in the  and click the  button.

The requested screen appears as follows (ex: ME5A):



NOTE: If you are not in the SAP Easy Access screen, you can use the following prefixes (shown in green) with a transaction code:

/nME5A - will move the current session.

/oME5A - will open a new session.

Step 2. When finished, click the  button until you are at the SAP Easy Access Screen.

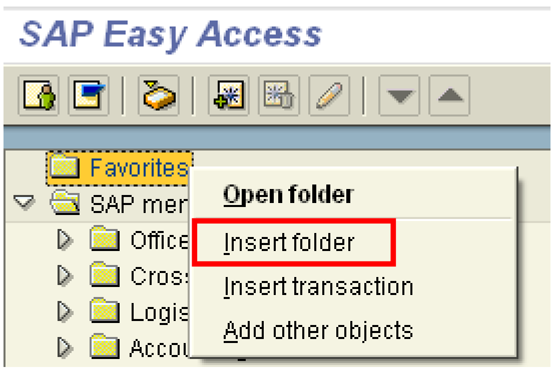
ADD A FAVORITES FOLDER

You can add favorites and folders to organize your favorites on the SAP Easy Access menu.

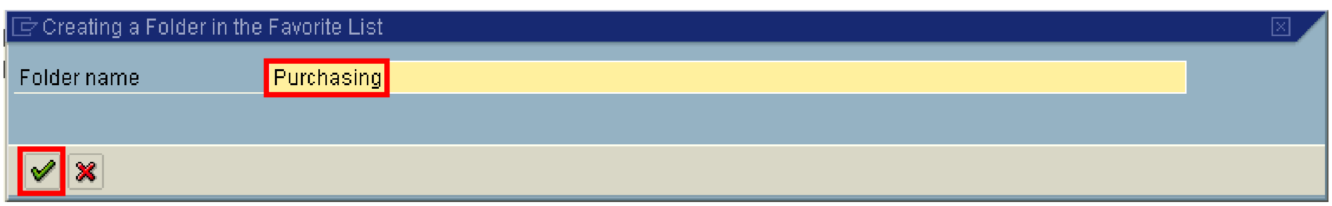
To add a folder that you can put favorites in:

Step 1. On the SAP Easy Access menu right-click on the “Favorites” folder.

Step 2. Click “Insert folder” on the menu (highlighted below).

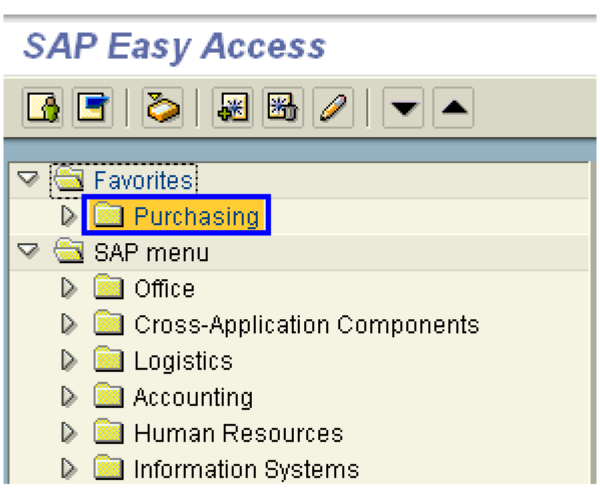


Step 3. Type in the name of the new folder (ex: Purchasing) in the “Creating a Folder” pop-up box.



Step 4. Click the  button (highlighted above).

Step 5. The new folder (ex: Purchasing) appears under the Favorites folder (highlighted below).



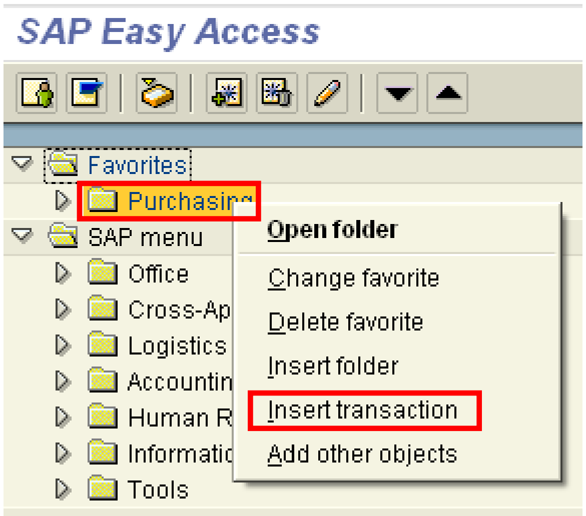
ADD FAVORITE WITH KNOWN TRANSACTION

You can add favorites for transaction codes on the SAP Easy Access menu.

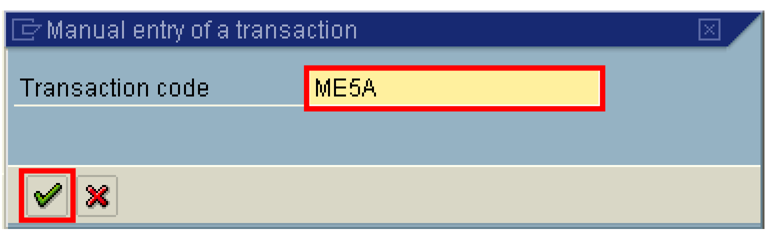
To add a favorite <u>when you know the transaction code</u>:

<u>Step 1.</u> On the SAP Easy Access menu right-click on the favorites folder you wish to create the favorite in (ex: Purchasing).

<u>Step 2.</u> Click "Insert transaction" on the menu (highlighted below).

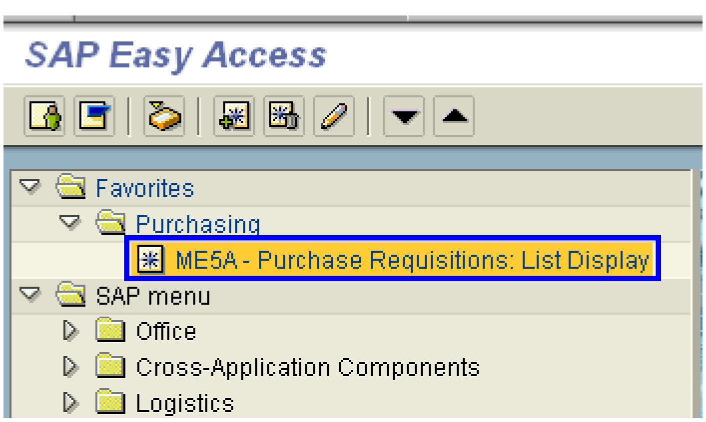


<u>Step 3.</u> Type in the transaction code (ex: ME5A) you wish to add a favorite for (highlighted below).



<u>Step 4.</u> Click the  button (highlighted above).

<u>Step 5.</u> The new favorite is added under the specified folder (highlighted below).

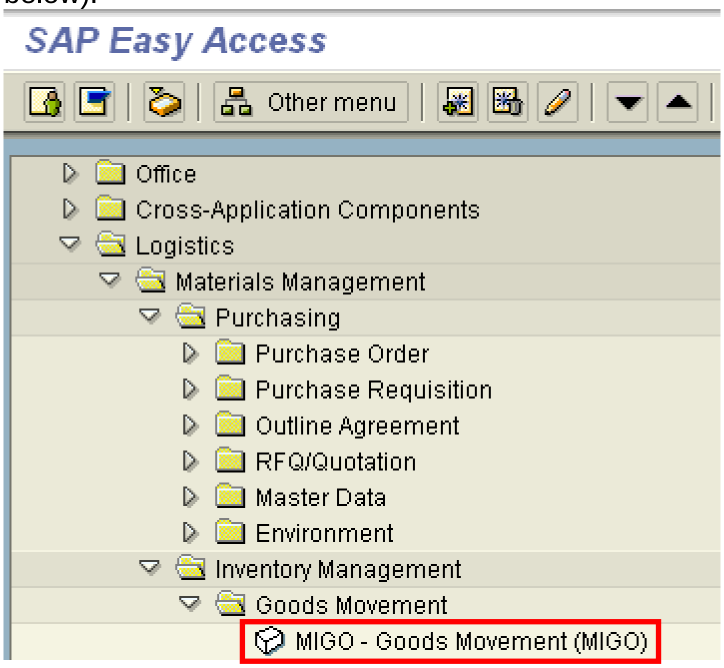


ADD FAVORITE FROM MENU / RENAME FAVORITES

You can also add a favorite that you locate on the SAP menu. This is useful when you do not remember a specific transaction code or when a transaction code is long, as with many reports.

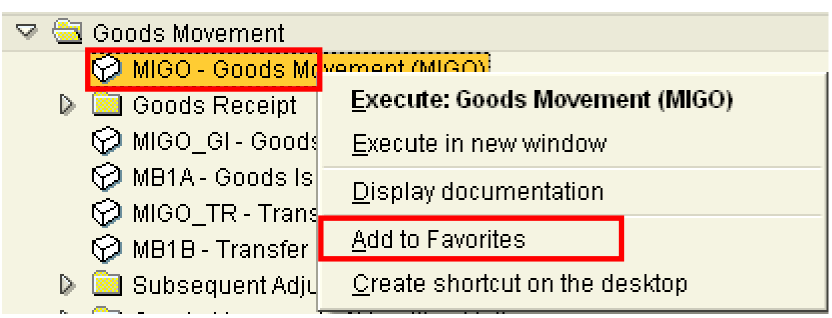
To add a favorite that you locate on the menu:

Step 1. Open the menu structure and locate the transaction you wish to add a favorite for (as highlighted below).

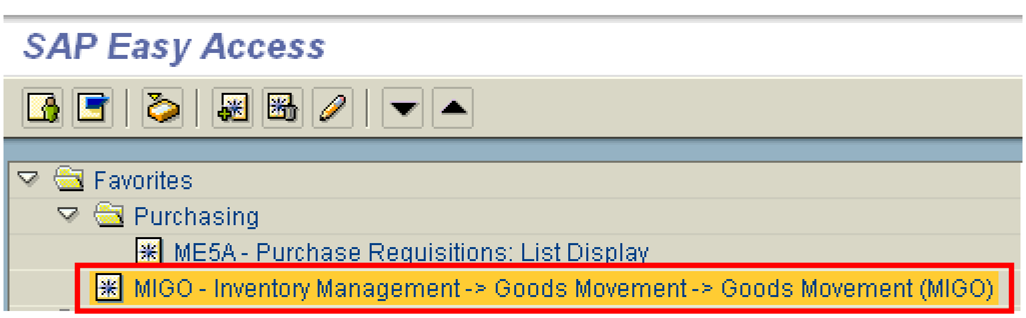


Step 2. Position the mouse cursor over the transaction and right-click with your mouse.

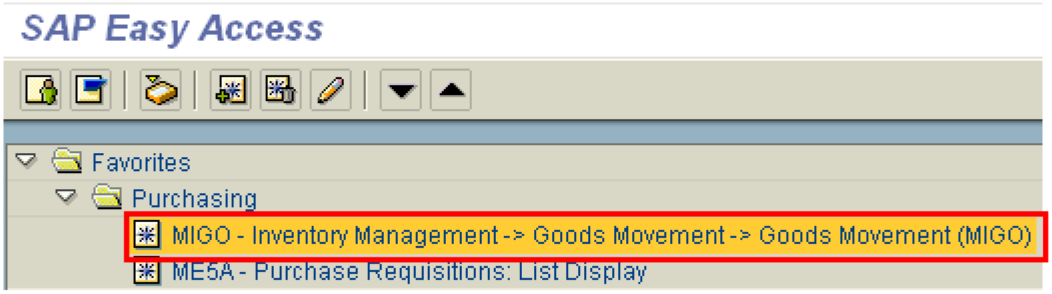
Step 3. Click "Add to Favorites" from the menu (highlighted below).



Step 4. Review the favorite that is now under your Favorites folder.

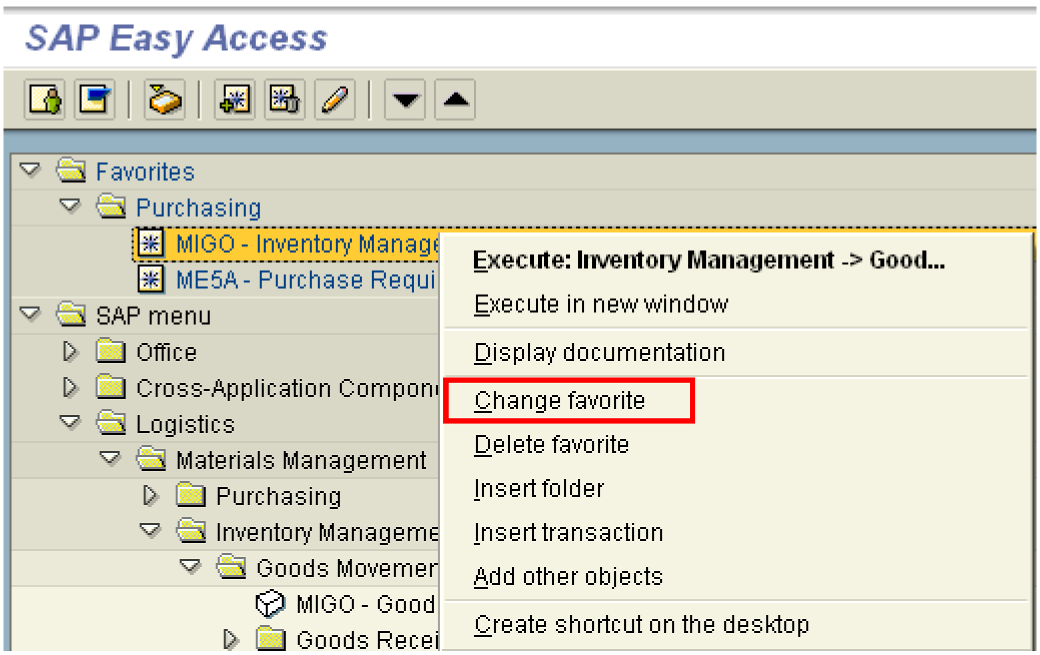


Step 5. If desired, click on the new favorite and drag it into another favorites folder.

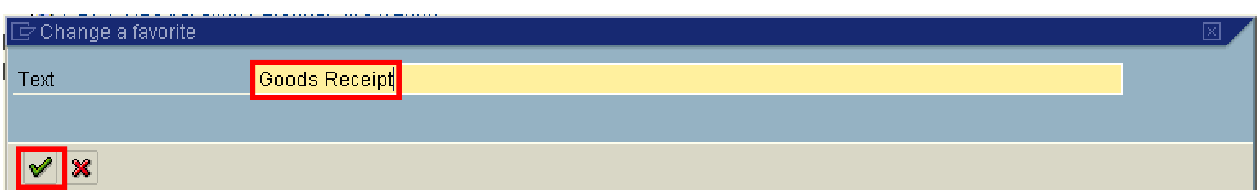


NOTE: In the above example, The new favorite was dragged into the "Purchasing" folder.

Step 6. If desired, you can **rename** your new favorite. To rename a favorite, right-click on it and select "Change favorite" (highlighted below).

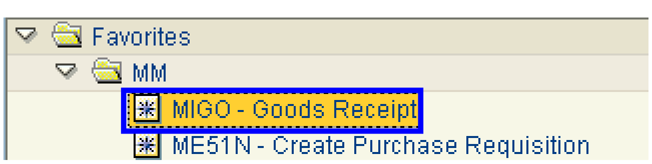


Step 7. Type in the new favorite name (ex: Goods Receipt) in the "Change a favorite" pop-up box.



Step 8. Click the  button (highlighted above).

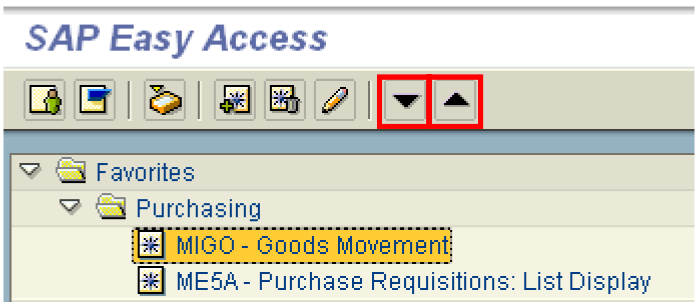
The renamed favorite appears (highlighted below):



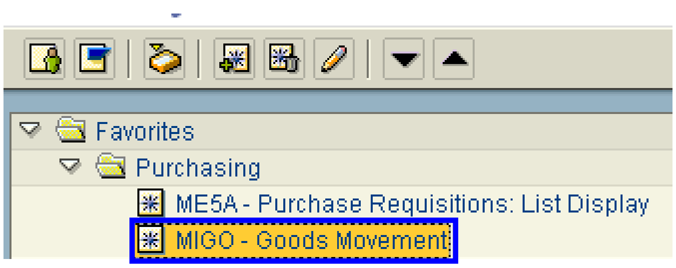
REORDER / DELETE FAVORITES

Step 1. To **reorder** favorites, click on the favorite (highlighted below).

Step 2. Click the button to move the favorite down until it is in the desired position (highlighted below). (If you wish to move the favorite up, click the button).



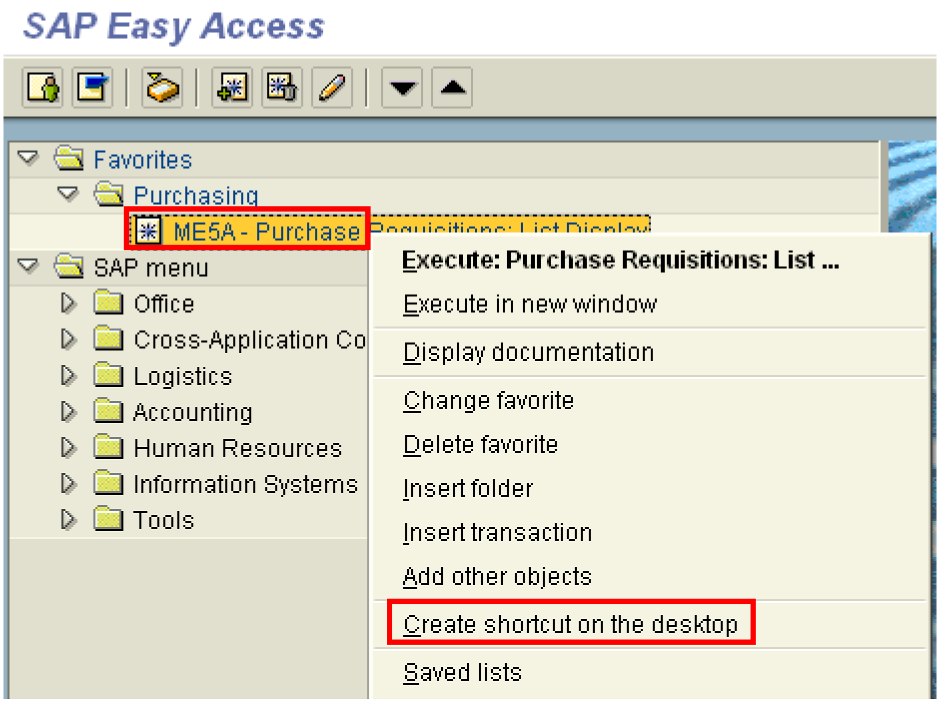
The favorite is now repositioned (highlighted below).



Step 3. To **delete** a favorite, right-click on it and select "Delete favorite" (highlighted below).

ADD A FAVORITE TO THE DESKTOP

Step 1. To create a shortcut on your desktop, right-click on the favorite and select “Create shortcut on the desktop” (highlighted below).



Step 2. The message 

will appear on the status bar.

Step 3. To use the shortcut, minimize any open windows and double-click on the shortcut on your desktop.

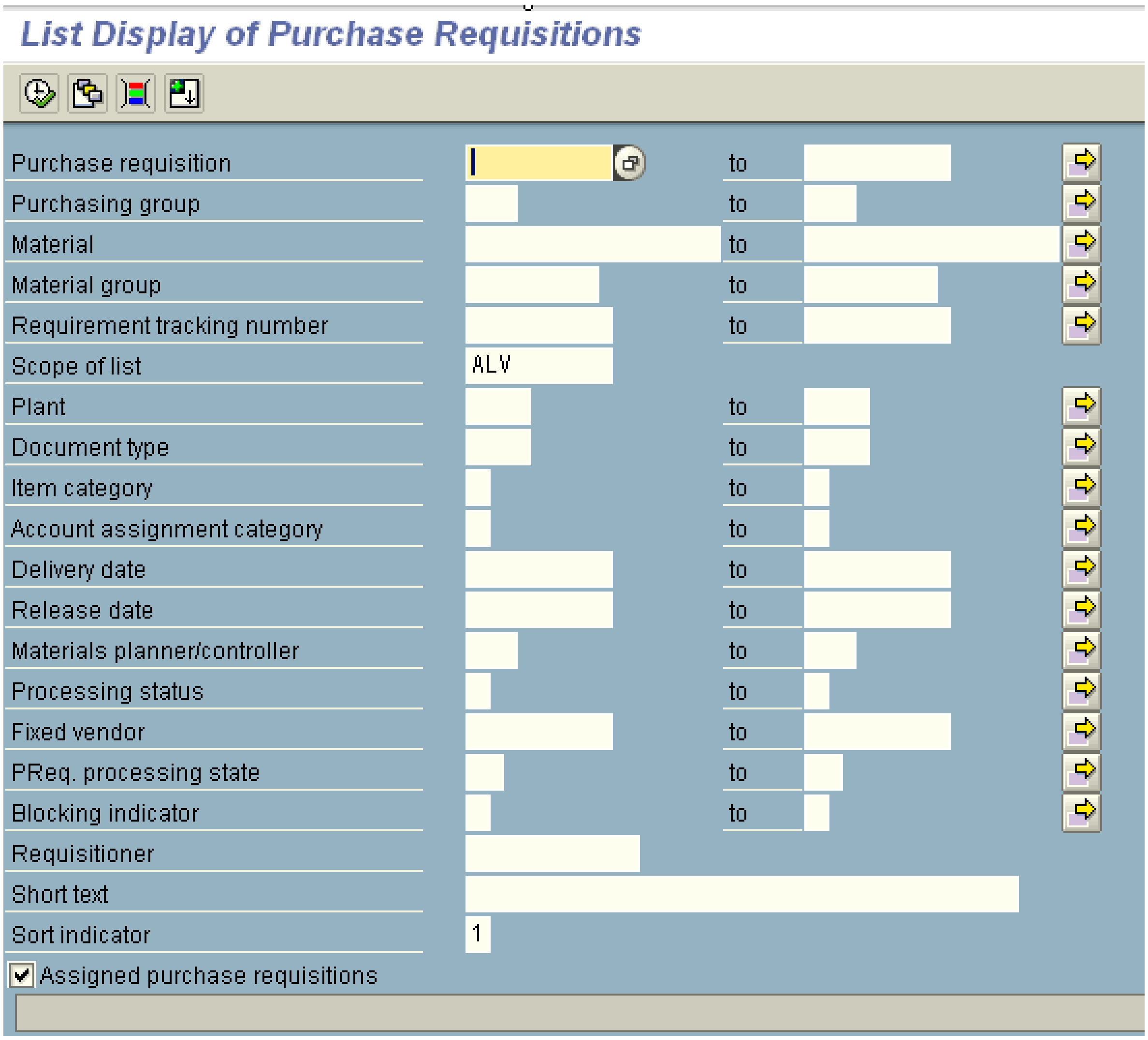
<u>NOTE:</u> If desired, you can right-click on the shortcut to rename it.

Step 4. Type in your password in the pop-up that appears (highlighted below).

Step 5. Click the 

button (highlighted above).

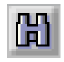
The screen for that shortcut will appear (displayed below).

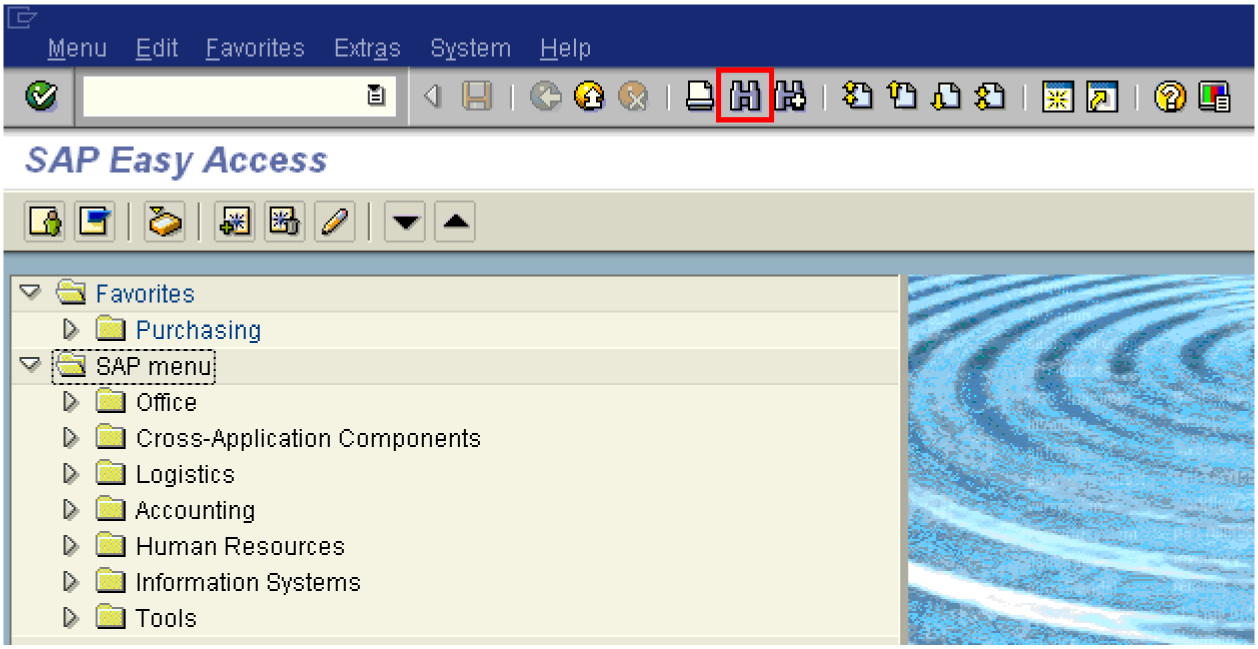


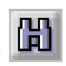
Step 6. When finished using the transaction code, click the button until you are at the SAP Easy Access screen.

USE FIND TO LOCATE TRANSACTIONS

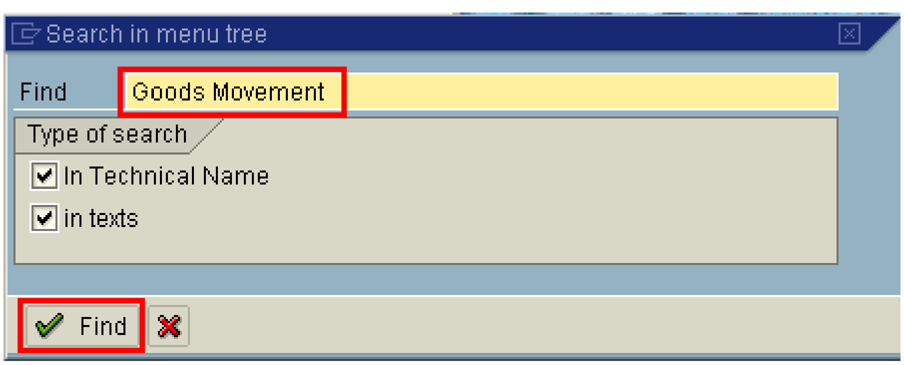
To locate transactions by using the find feature:

<u>Step 1.</u> At the SAP Easy Access screen, click the  button (highlighted below).



<u>NOTE:</u> In screens other than the SAP Easy Access screen, the  *button will typically search for specific data, rather than transaction codes as illustrated here.*

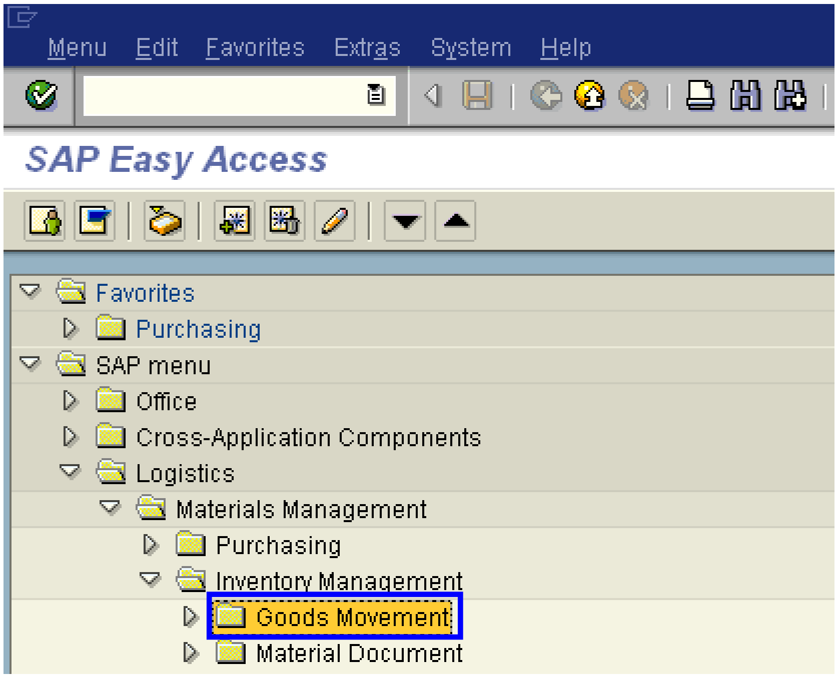
<u>Step 2.</u> Type in a search description or transaction code in the “Find” field (ex: Goods Movement) of the search pop-up menu (highlighted below).



<u>Step 3.</u> Click the 

button (highlighted above).

The results of the search are highlighted below.



<u>Step 4.</u> If desired, click the  button to search for additional occurrences.

<u>Step 5.</u> The additional search results are highlighted below.

<u>NOTE:</u> You can click the  *button to search for additional occurrences as many times as needed.*

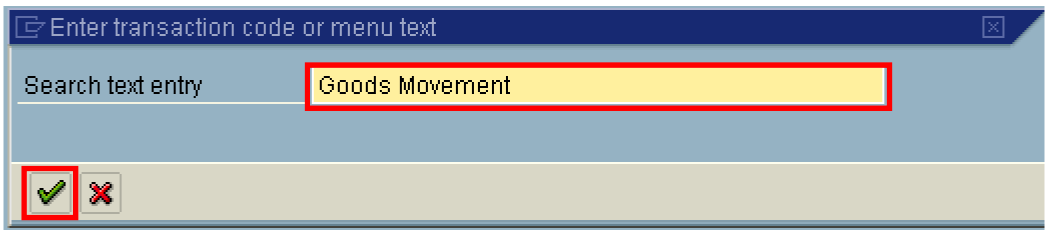
USE THE SAP SEARCH MENU

The SAP Search Menu can be used to search the SAP menu for a transaction code.

To use the SAP Search Menu:

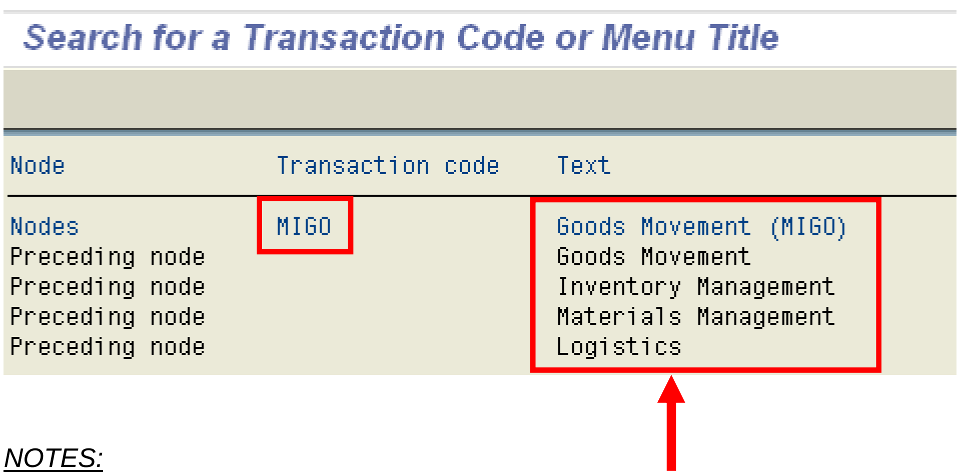
Step 1. At the SAP Easy Access screen, type **SEARCH_SAP_MENU** in the and click the button.

Step 2. In the search pop-up box, enter the screen name or transaction code [ex: Goods Movement] to search for (as highlighted below):



Step 3. Click the button (as highlighted above).

Step 4. View the search results as shown below. Scroll down as needed.



NOTES:

The search results for this screen show that the Goods Movement screen can be accessed with transaction MIGO (as highlighted above).

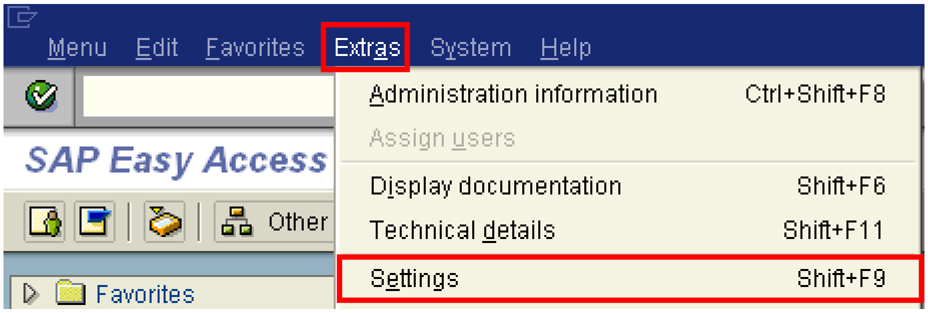
To read the menu path on this screen, start at the bottom and proceed up (as highlighted above): Logistics > Materials Management > Inventory Management > Goods Movement > Goods Movement (MIGO)

Step 5. When finished, click the button until you are at the SAP Easy Access Screen.

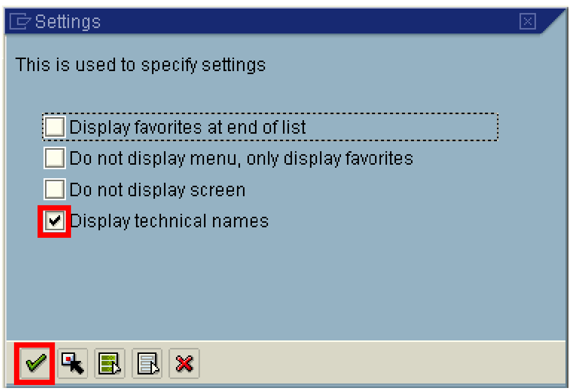
DISPLAY TRANSACTION CODES

You can view transaction codes on the SAP Menu by changing the following user settings:

<u>Step 1.</u> At the SAP Easy Access screen click on “Extras > Settings” (as highlighted below).



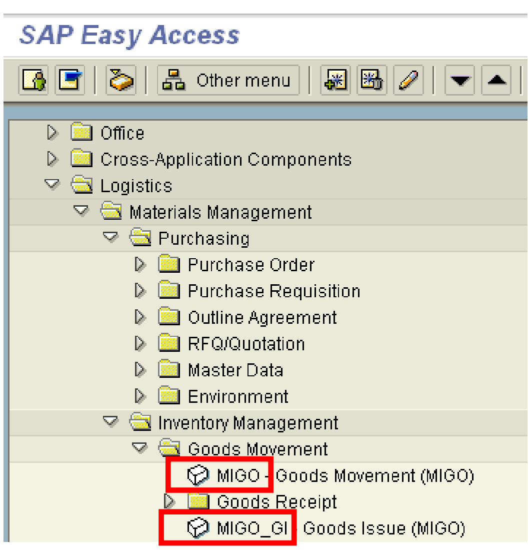
<u>Step 2.</u> Select the “Display technical names” checkbox (highlighted below).



<u>NOTE:</u> You can select the “Do not display screen” checkbox to change the rippling water background on the SAP Easy Access menu into a solid blue background.

<u>Step 3.</u> Click the  button (highlighted above).

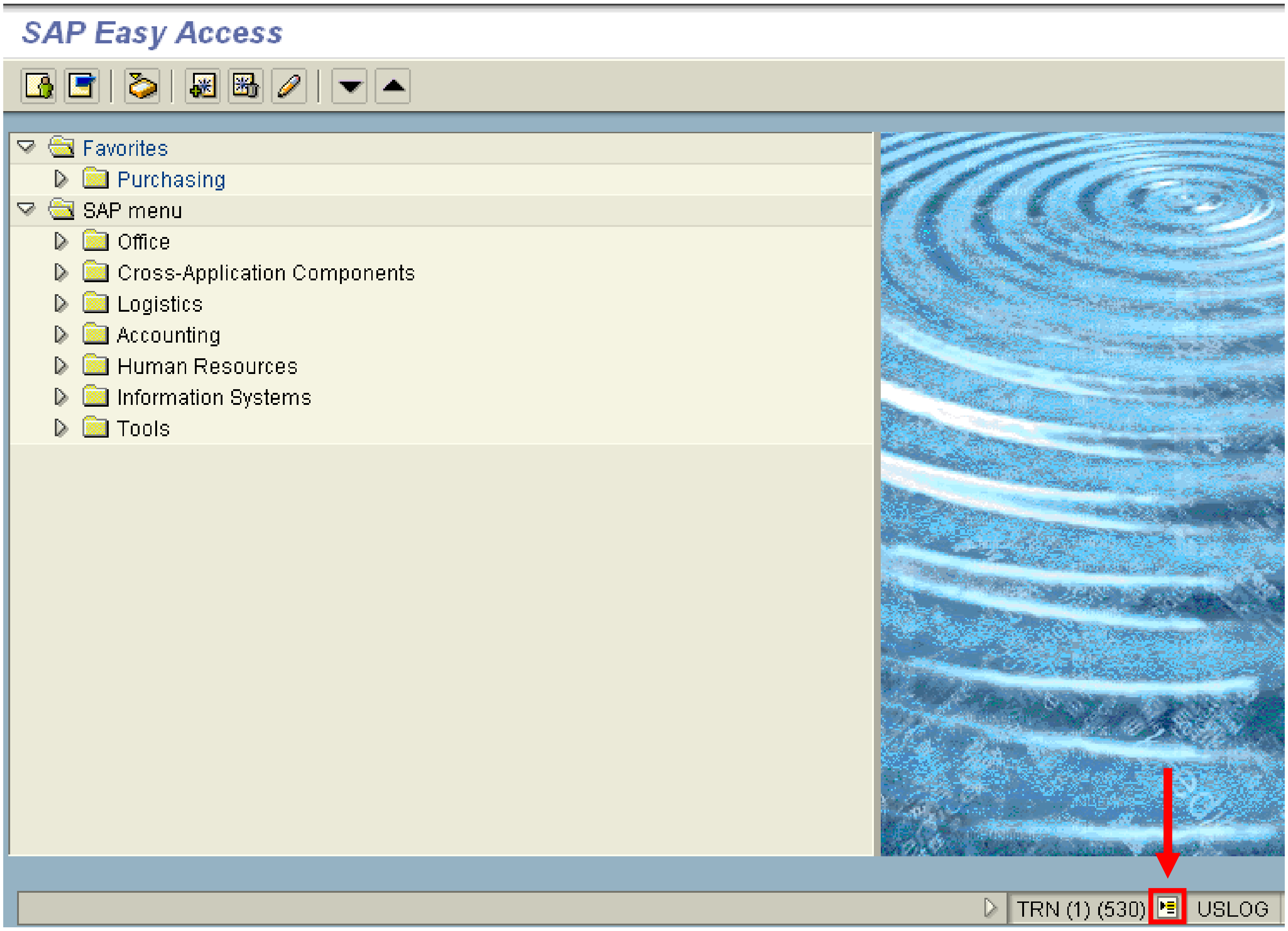
<u>Step 4.</u> Open the menu structure and view the transaction codes that are now displayed (as highlighted below).



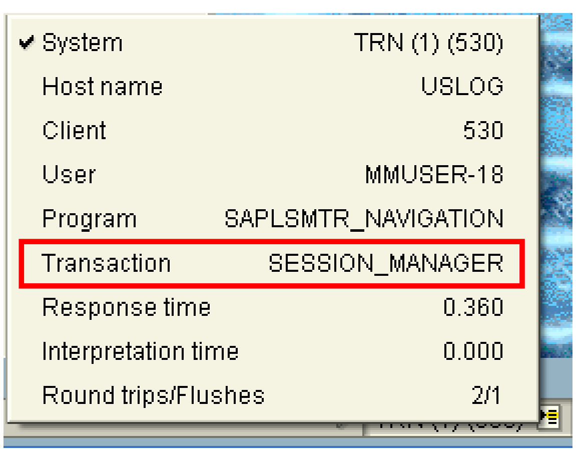
DISPLAY CURRENT TRANSACTION

To display the transaction code for the screen you are currently in:

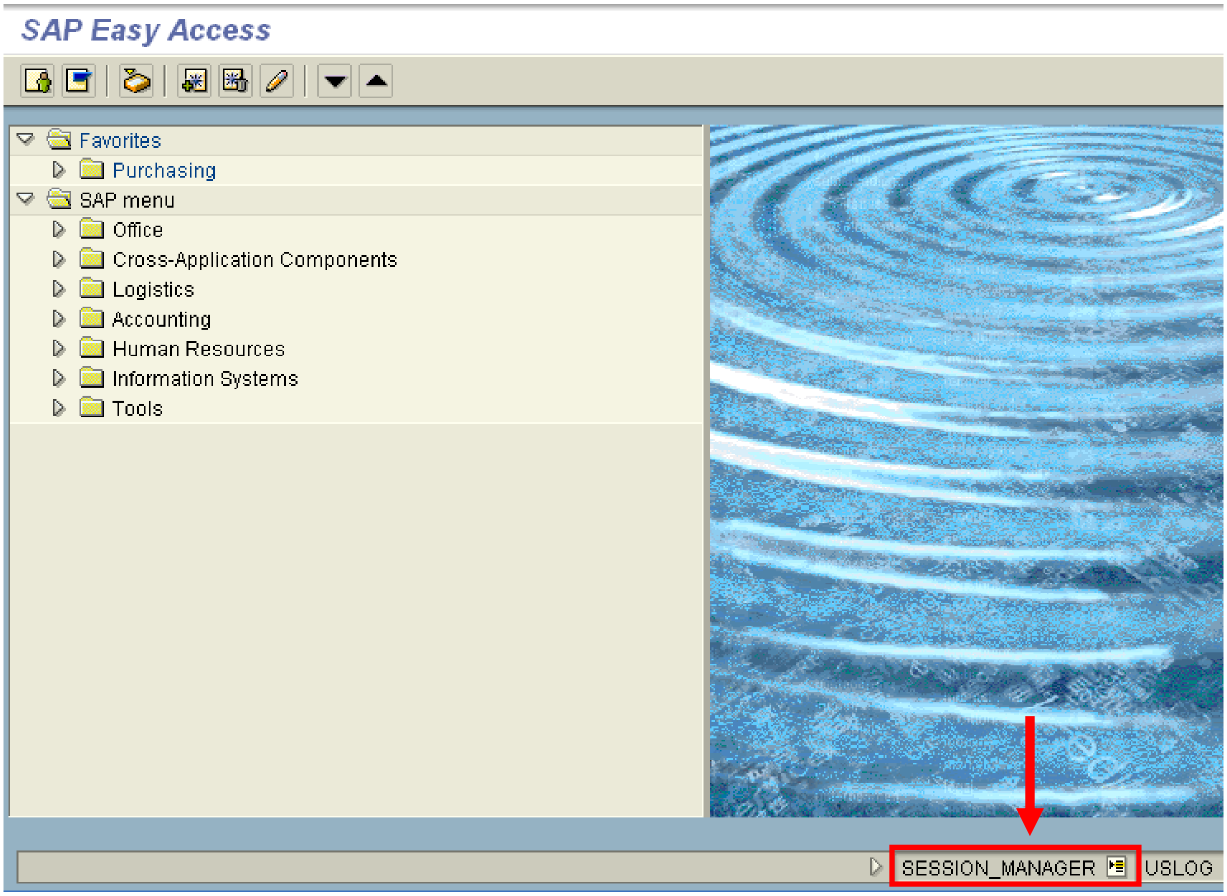
Step 1. At the SAP Easy Access screen, click the  button (highlighted below).

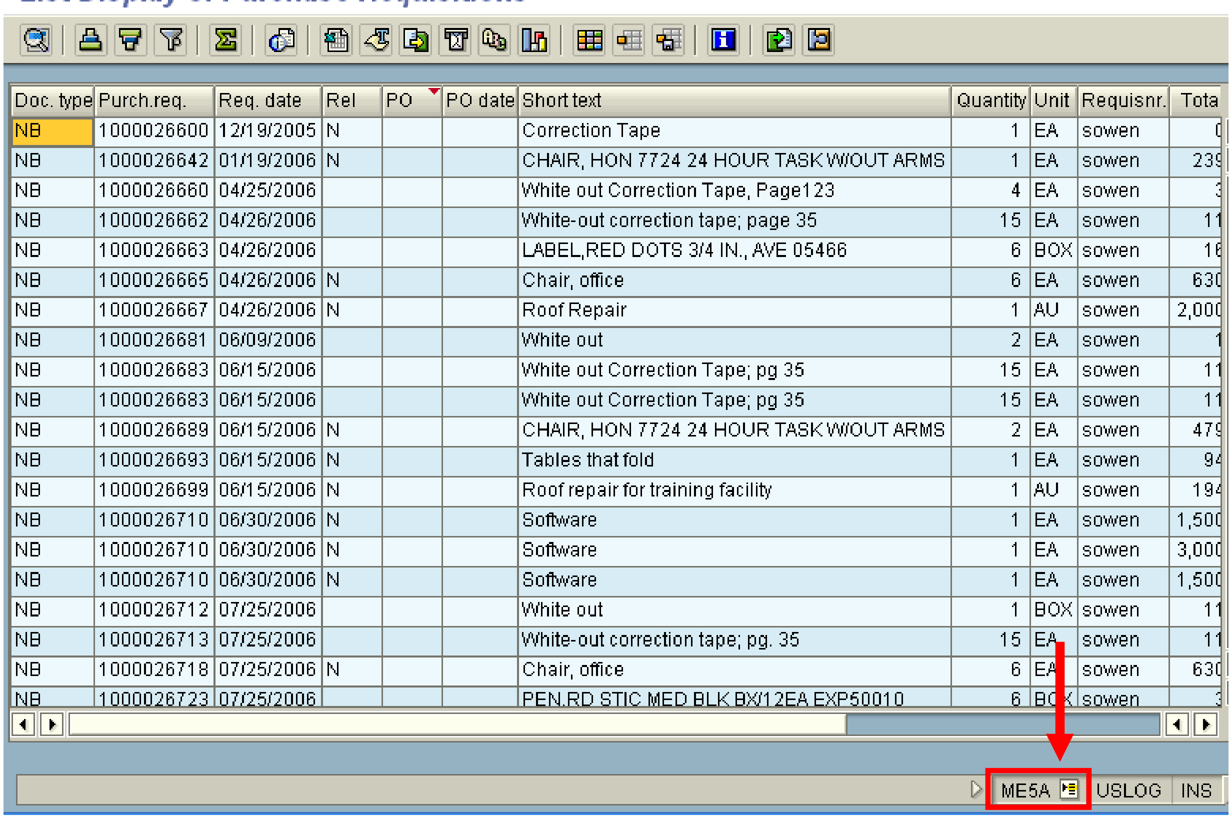


Step 2. Select Transaction SESSION_MANAGER from the pop-up (highlighted below).



The following screens illustrate the result of this option:



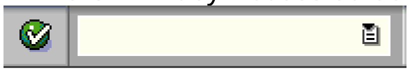


List Display of Purchase Requisitions

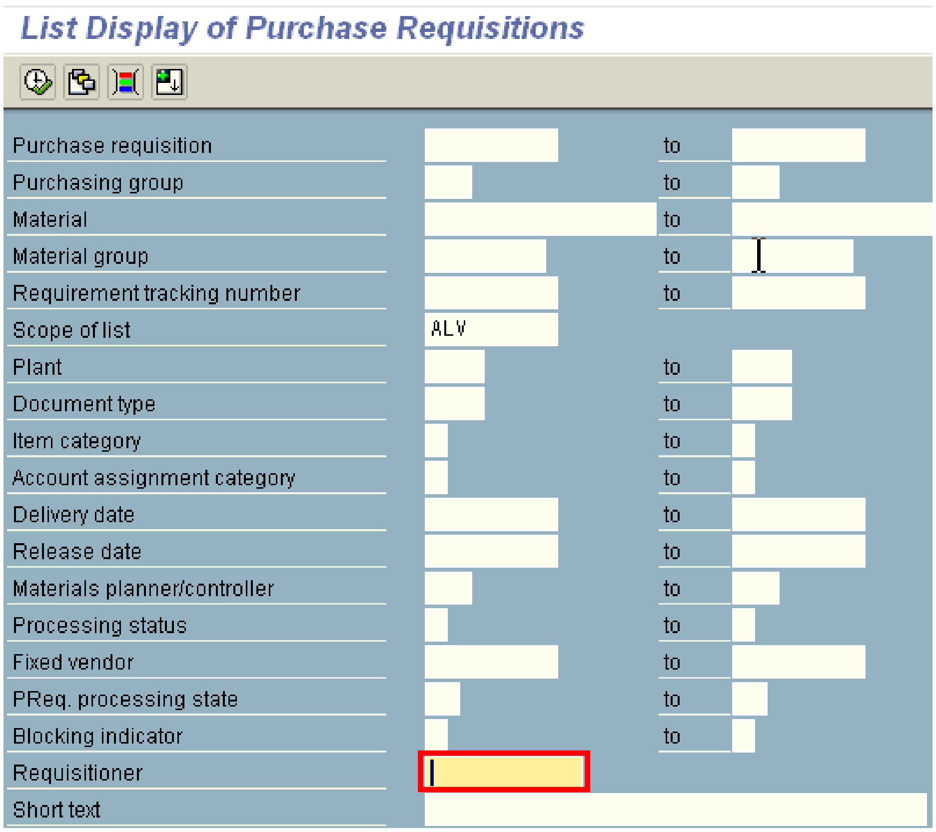
Doc. type	Purch.req.	Req. date	Rel	PO	PO date	Short text	Quantity	Unit	Requisnr.	Tota
NB	1000026600	12/19/2005	N			Correction Tape	1	EA	sowen	0
NB	1000026642	01/19/2006	N			CHAIR, HON 7724 24 HOUR TASK W/OUT ARMS	1	EA	sowen	239
NB	1000026660	04/25/2006				White out Correction Tape, Page123	4	EA	sowen	3
NB	1000026662	04/26/2006				White-out correction tape; page 35	15	EA	sowen	11
NB	1000026663	04/26/2006				LABEL,RED DOTS 3/4 IN., AVE 05466	6	BOX	sowen	16
NB	1000026665	04/26/2006	N			Chair, office	6	EA	sowen	630
NB	1000026667	04/26/2006	N			Roof Repair	1	AU	sowen	2,000
NB	1000026681	06/09/2006				White out	2	EA	sowen	1
NB	1000026683	06/15/2006				White out Correction Tape; pg 35	15	EA	sowen	11
NB	1000026683	06/15/2006				White out Correction Tape; pg 35	15	EA	sowen	11
NB	1000026689	06/15/2006	N			CHAIR, HON 7724 24 HOUR TASK W/OUT ARMS	2	EA	sowen	479
NB	1000026693	06/15/2006	N			Tables that fold	1	EA	sowen	94
NB	1000026699	06/15/2006	N			Roof repair for training facility	1	AU	sowen	194
NB	1000026710	06/30/2006	N			Software	1	EA	sowen	1,500
NB	1000026710	06/30/2006	N			Software	1	EA	sowen	3,000
NB	1000026710	06/30/2006	N			Software	1	EA	sowen	1,500
NB	1000026712	07/25/2006				White out	1	BOX	sowen	11
NB	1000026713	07/25/2006				White-out correction tape; pg. 35	15	EA	sowen	11
NB	1000026718	07/25/2006	N			Chair, office	6	EA	sowen	630
NB	1000026723	07/25/2006				PEN,RD STIC MED BLK BX/12EA EXP50010	6	BOX	sowen	3

USE FIELD HISTORY

To display and reuse the values of fields that you have previously typed in:

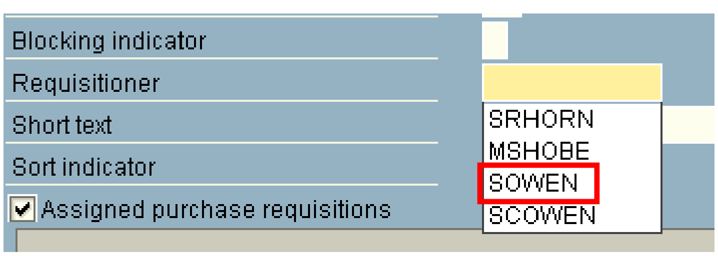
Step 1. At the SAP Easy Access screen, type the desired transaction code (ex: ME5A) in the  and click the  button.

Step 2. Click in a field where you have previously type in values. (ex: Requisitioner)



Step 3. Press the backspace key on your keyboard.

Step 4. Click on the desired field value [ex: SOWEN] from the drop-down list (highlighted below).



Step 5. The selected value will now populate the field (highlighted below).

Step 6. When finished, click the  button until you are at the SAP Easy Access Screen.

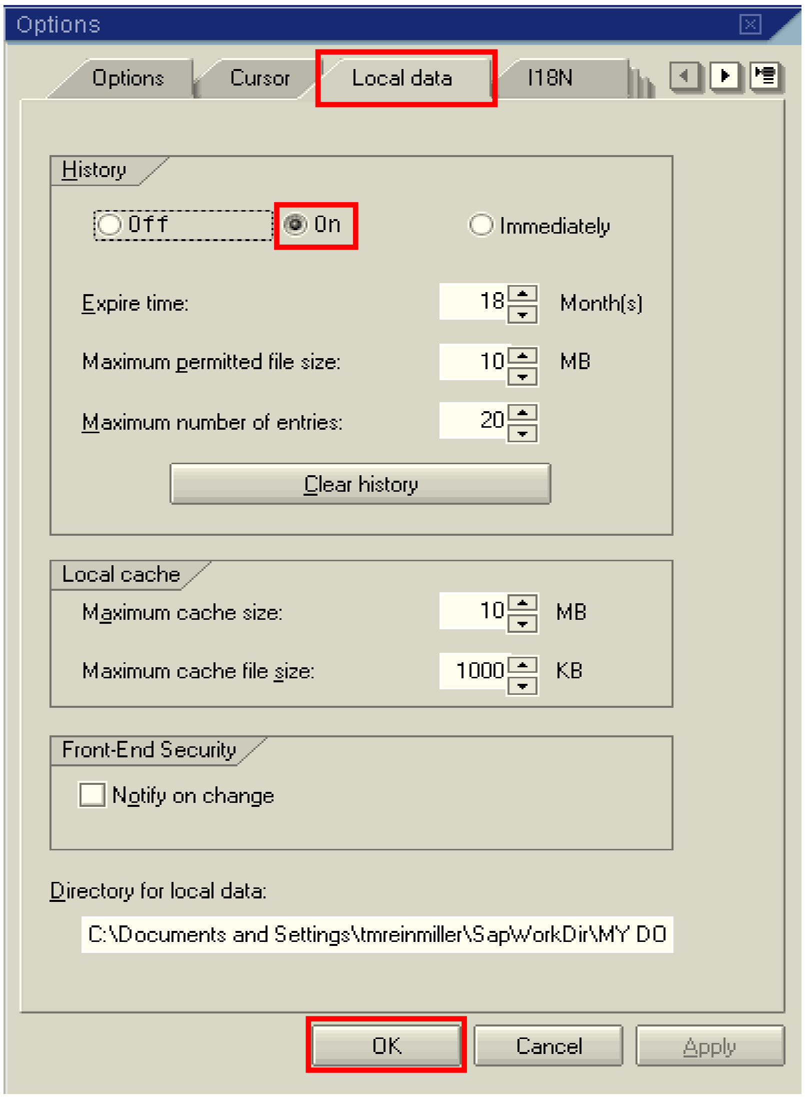
ADJUST FIELD HISTORY OPTIONS

To adjust your field history options:

Step 1. At the SAP Easy Access screen, click the button.

Step 2. Select Options ... from the drop-down menu.

Step 3. Click on the Local data tab (highlighted below).



Step 4. Make sure the "History" option has On selected so that you can retrieve field history (highlighted above).

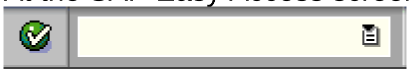
NOTE: The Clear history button can be used to clear existing history.

Step 5. When finished, click the OK button (highlighted above).

RETRIEVE FIELD VALUES / FIELD HELP

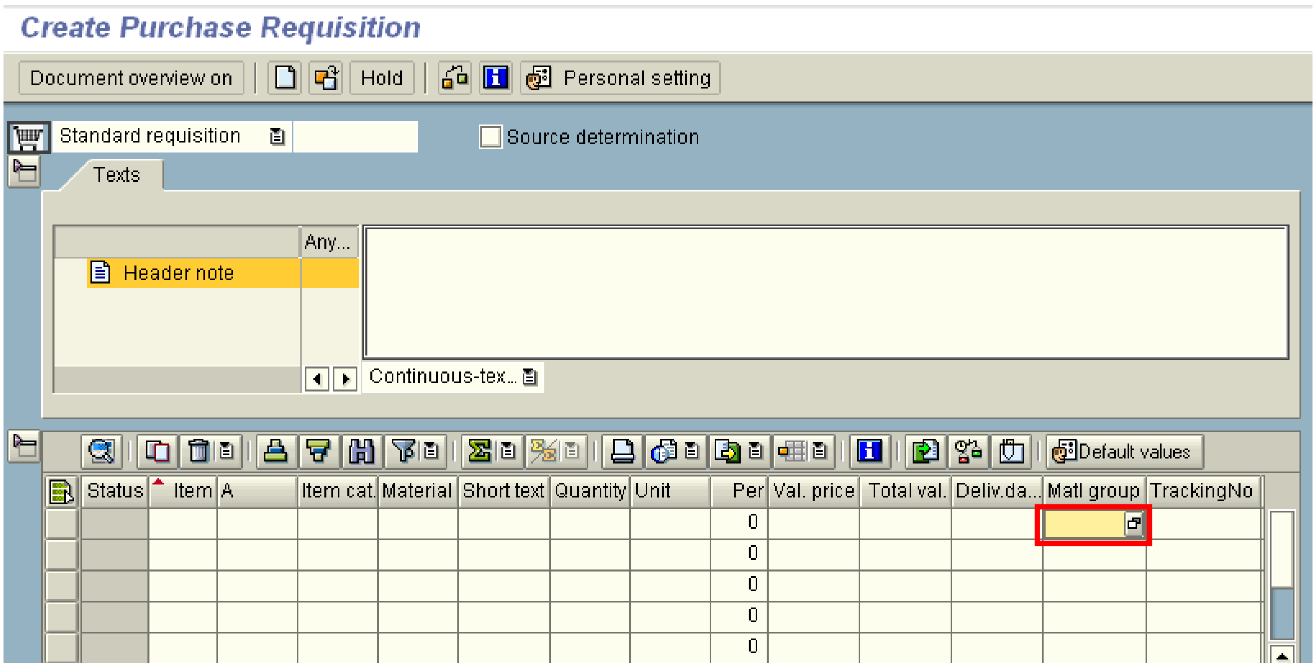
To access a list of the valid values or the "picklist" for a particular field:

Step 1. At the SAP Easy Access screen, type the desired transaction code (ex: ME51N) in the



and click the button.

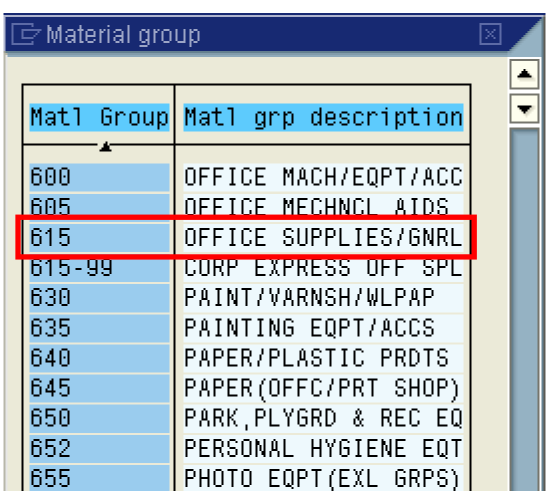
Step 2. Click in the field where you wish to retrieve a valid value (ex: "Matl Group" - highlighted below).



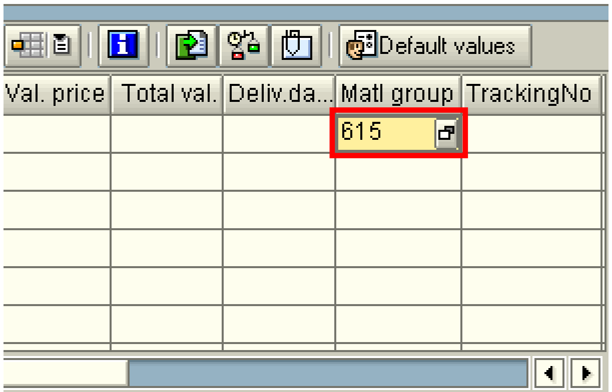
Step 3. Click the button (or press the "F4" function key).

Step 4. Scroll down if needed to find the desired value.

Step 5. Double-click on the desired value in the pop-up list (ex: "615 - Office Supplies / General" - highlighted below).

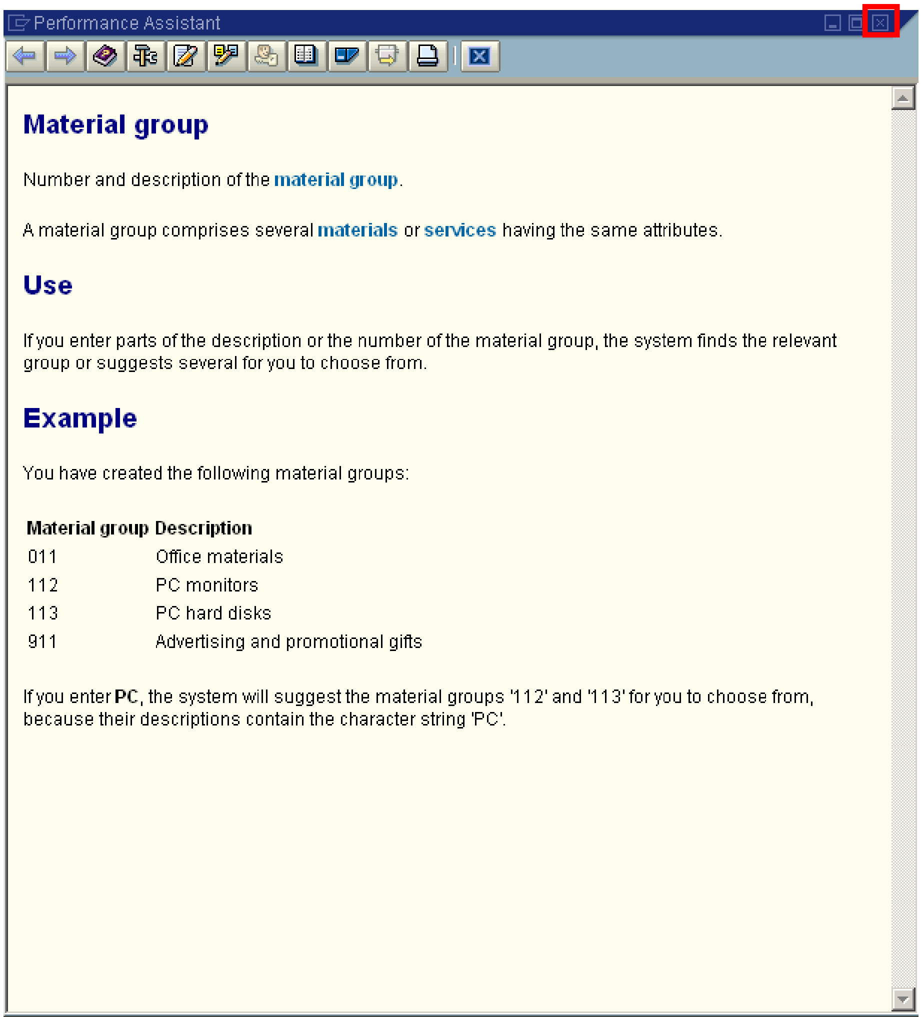


Step 6. The selected value will appear in the field (highlighted below).



Step 7. For help information on a **specific field**, click in the field (ex: "Matl Group") and press the "**F1**" function key or use the button.

Step 8. After viewing the field help (shown below), click the button to close the help screen.



NOTE: Field help can be also be printed using the button.

CREATE A PERSONALIZED PICKLIST

Some picklists in SAP can be lengthy. To customize these picklists, you can create your own "personal list" with the specific items you use on a regular basis.

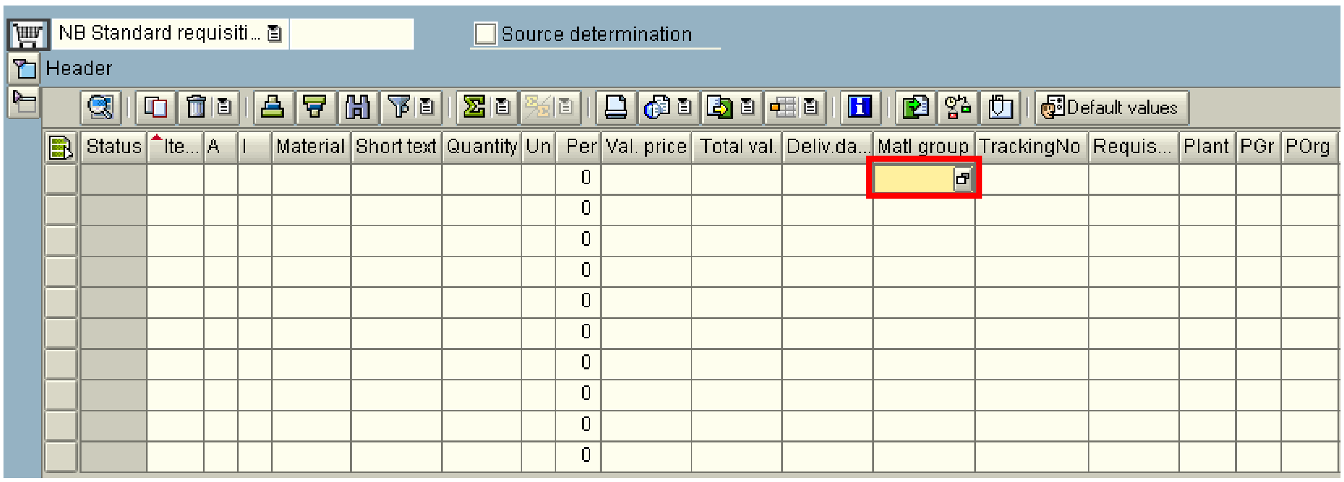
To create a personal list:

Step 1: At the SAP Easy Access screen, type the desired transaction code (ex: ME51N) in the 

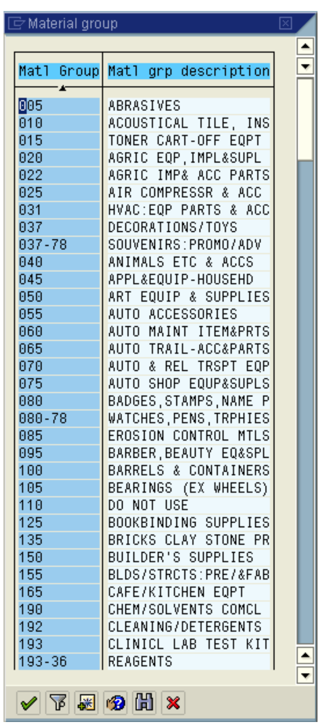
Command Field. The *Create Purchase Requisition* screen appears.

NOTE: You do not have to create a requisition to create a personal list.

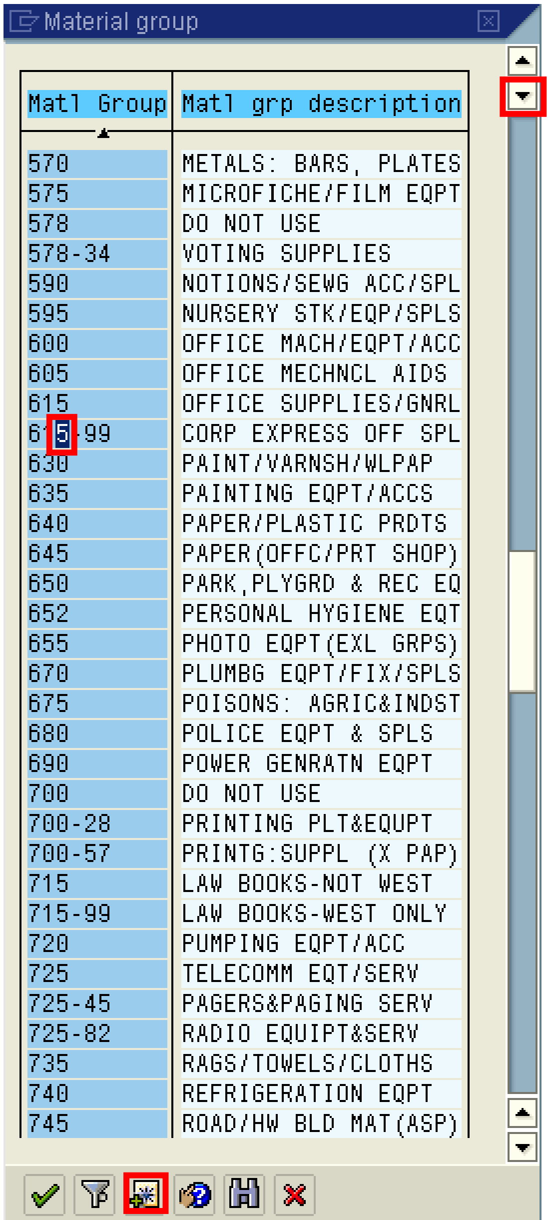
Step 2: Single click on the Material group field to highlight it (as shown below).



Step 3: Click on the  (drop-down) button [highlighted above].



Step 4: A listing of the material groups will be displayed as shown above.



Step 5: Scroll down the list to locate the material group you wish to add to your personal list (ex: Corporate Express Office Supplies).

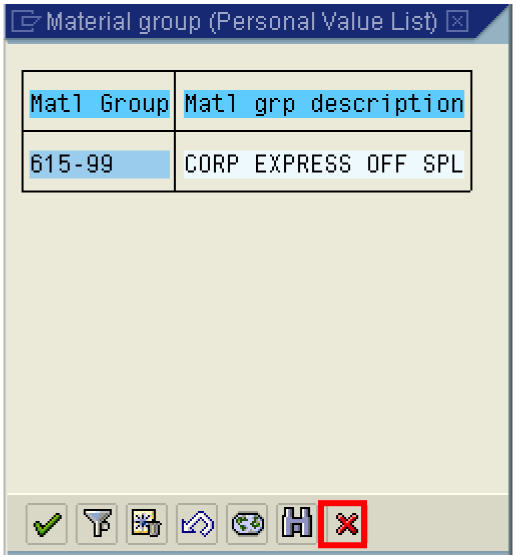
Step 6: Single click anywhere on the item (ex: CORP EXPRESS OFF SPL) and a small dark blue box will appear on that item as shown above.

Step 7: Click on button to add the selected item to Personal List.

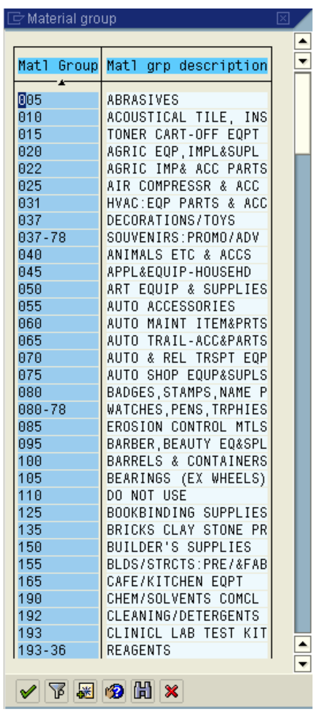
NOTE: After you create your personal list, the button will appear.

Step 8: Select the button (highlighted below) to display your personal list of material groups.

Step 9: Your new personal list will now be displayed as shown below.



Step 10: If you would like to see the whole material group list, click on the  button (highlighted above).



Step 11: To add other material groups to your personal list, repeat steps 5 – 10 above.

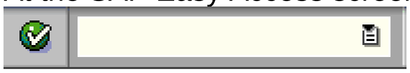
NOTES:

- *The next time you return to the material group field, your personal List will be displayed. To return to the entire material group list, click on the*  button.

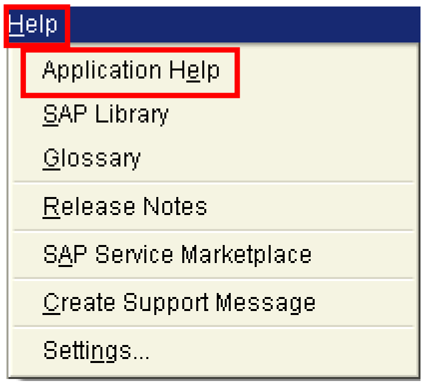
- *Personal list may be created for any field that has a pick list in SAP. Just look for the*  *button to add an additional item to your list.*

SCREEN HELP

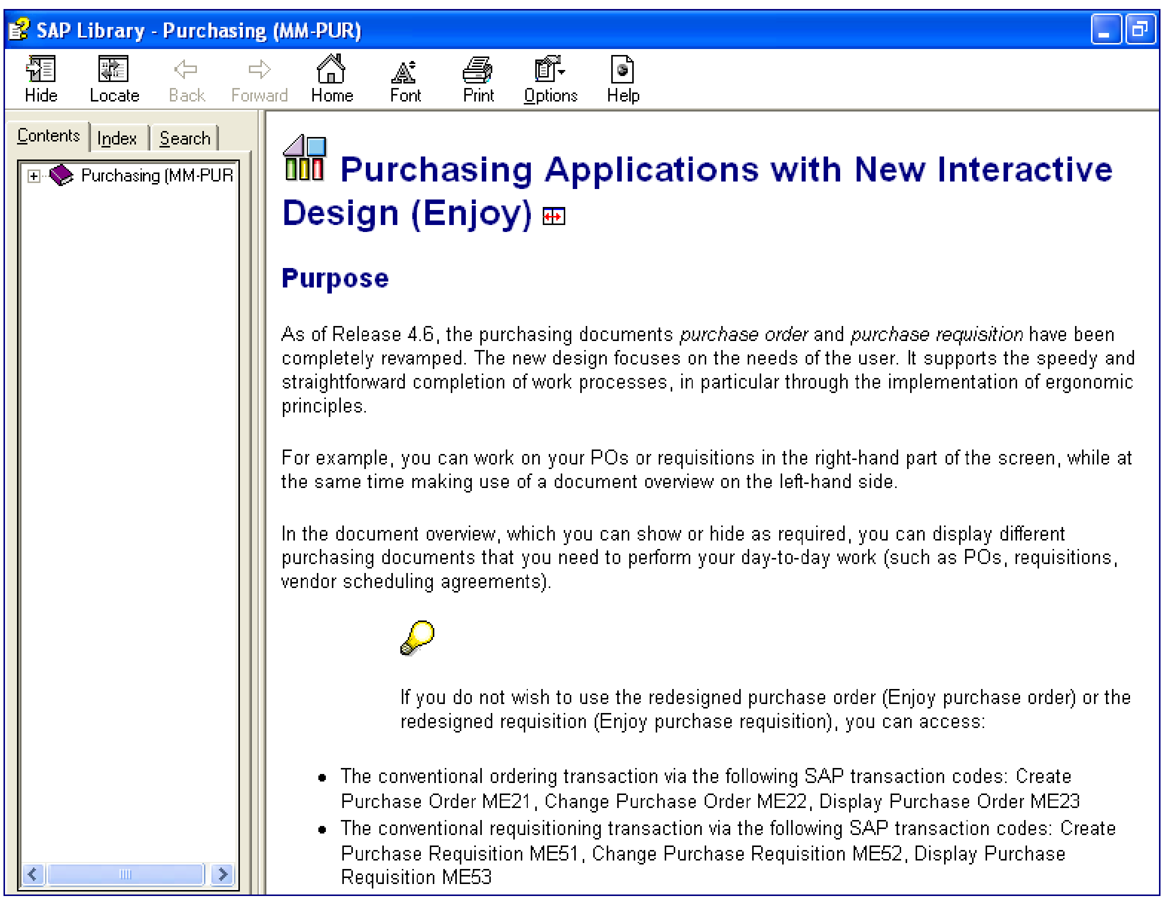
To access screen help for a particular screen:

Step 1. At the SAP Easy Access screen, type the desired transaction code (ex: ME51N) in the  and click the  button.

Step 2. Click Help > Application Help.



Step 3. After viewing the screen help (highlighted below), click the  button to close the help screen.

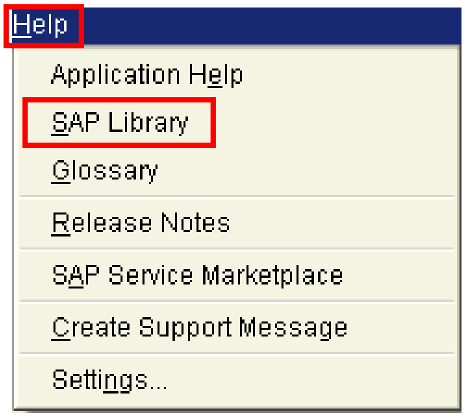


SYSTEM HELP

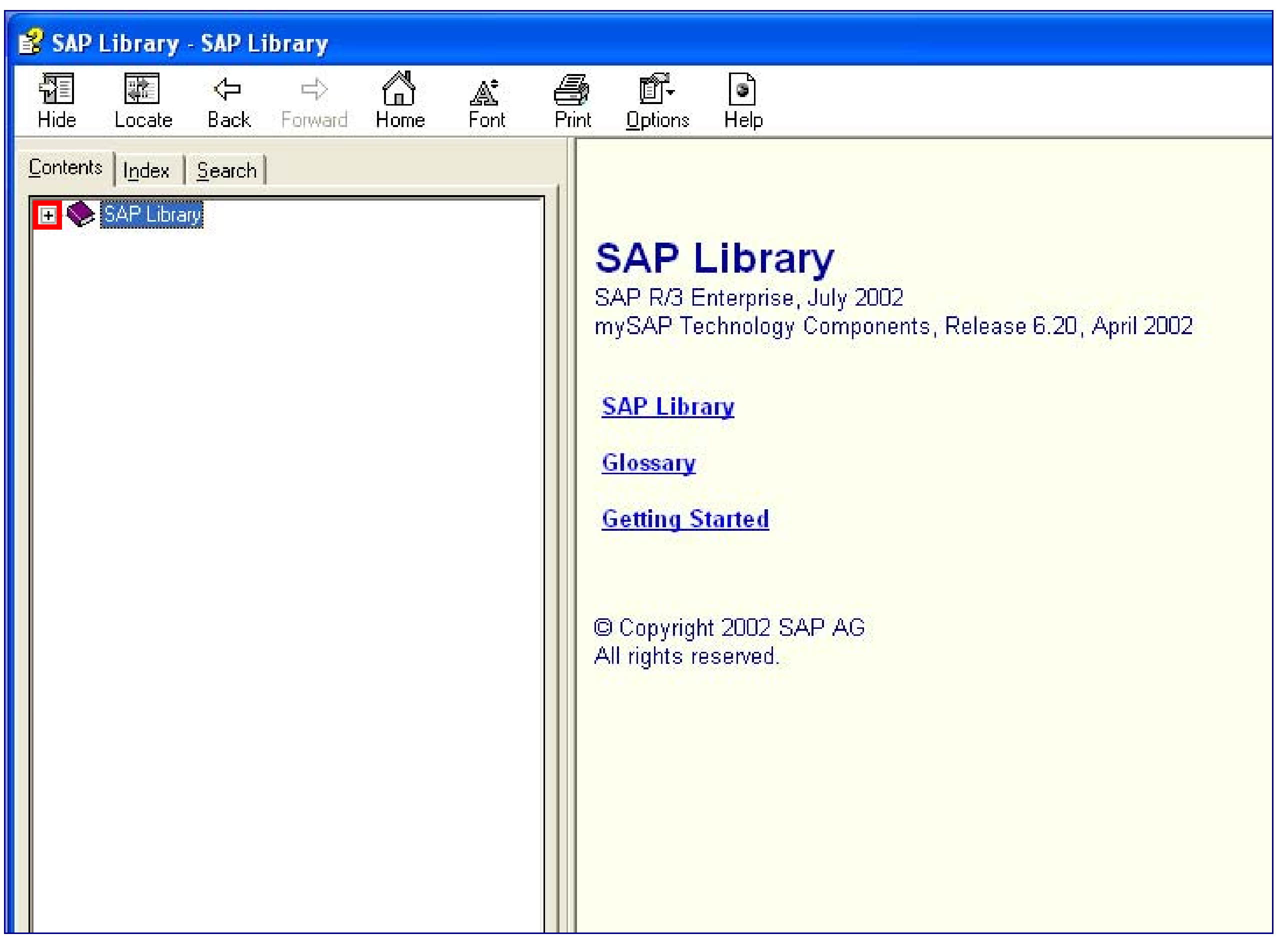
System help allows you to view documentation for every module within the SAP system.

To access system help:

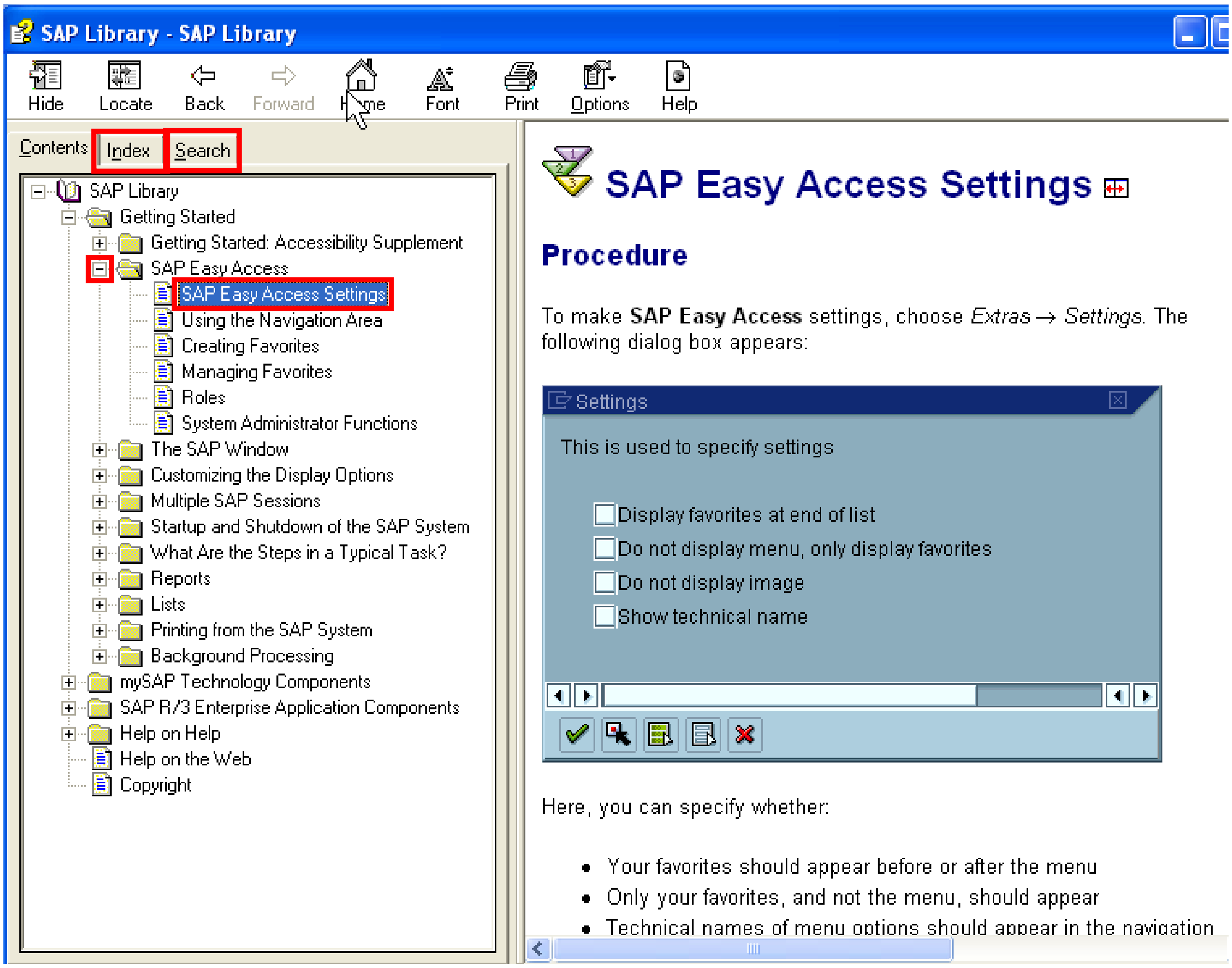
Step 1. On the Menu Bar click: Help > SAP Library.



Step 2. Click the [+] next to “SAP Library”.



Step 3. Continue clicking the ⊞ to open topics of interest. After locating a topic, double-click on it (ex: "SAP Easy Access Settings" - highlighted below) to read the documentation.



NOTES:

- The "Getting Started" section (highlighted above) is helpful for new users.

- The "Index" and "Search" tabs (highlighted above) can be used to search for a particular topic.

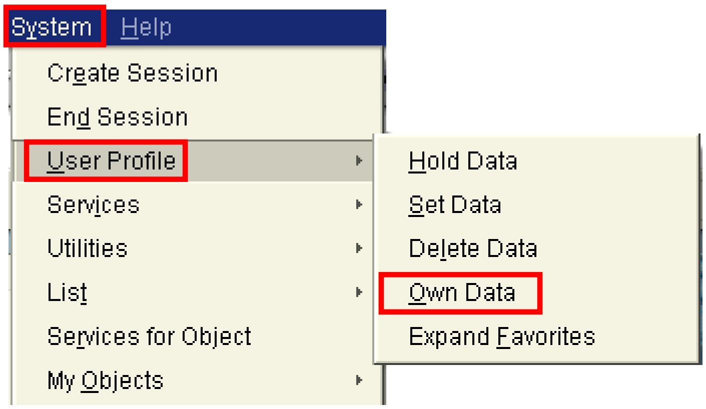
- The SAP Help Library is also available at the website: help.sap.com (do not enter www for this web address).

Step 4. When finished, click the ☒ button to close the help screen.

SAP PRINTER SETUP

If you are unable to print SAP documents, check the following settings:

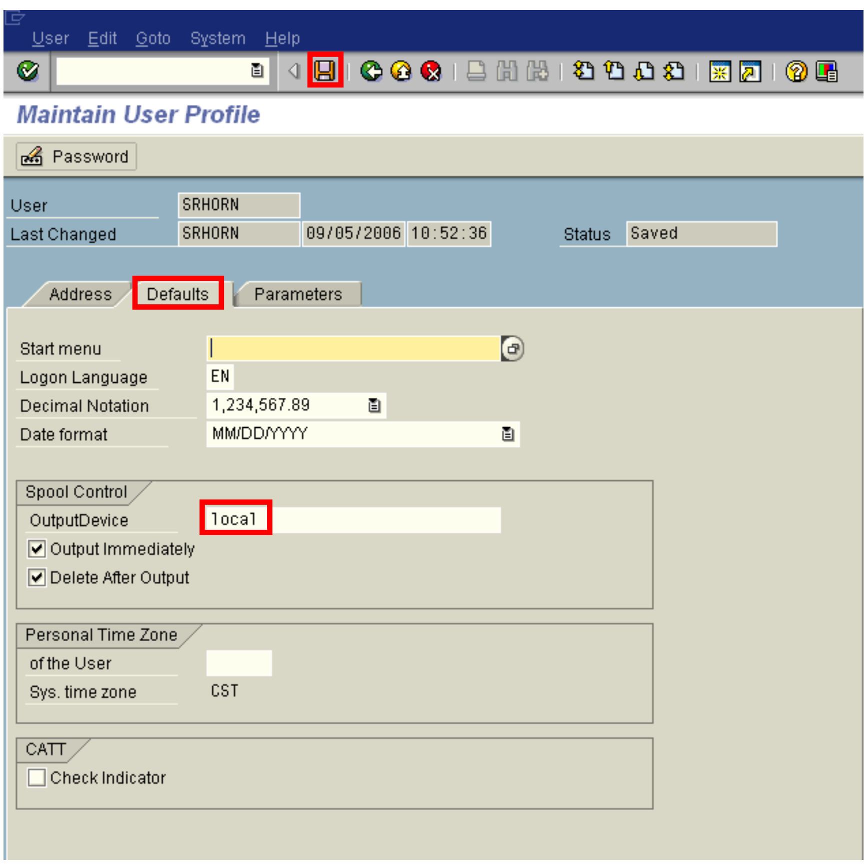
Step 1. On the Menu Bar click: System > User Profile > Own Data (Highlighted below).



Step 2. Click the 

tab.

Step 3. Type "**local**" in **lower case** letters in the Output Device field.



Step 4. Click the  button.