Navigation Course

Introduction to Navigation in SAP Solutions and Products

Product
SAP Business Suite 7.0

Level
Undergraduate
Beginner

Focus
SAP ERP 6.0 EhP4
Navigation

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Version
2.01

MOTIVATION

This material explains how to navigate in SAP systems. It is aimed at students at universities, universities of applied sciences and other educational institutions with no previous experience of SAP software. It can be used in the classroom or for self-study.

On completion of the course, students will be able to navigate through the user interface to work on business processes and case studies on their own.

The material also serves as a reference for occasional users of SAP systems.

LEARNING METHOD

The learning method used is "guided learning." This is a suitable method because navigating in SAP systems is a fundamental skill yet there is a lot to learn.

The benefit of this method is that knowledge is imparted quickly. Students also acquire practical skills and competencies. As with an exercise, this method explains a process or procedure in detail.

Exercises at the end enable students to put their knowledge into practice and remember it better.

SAP | University Alliances

Logging on

**Task** Log on to the system. **Time** 10 min

Short Description Use the SAPGui to log on to the SAP system.

Find and double-click this icon on your desktop. If it is not there, choose *Start ► All Programs ► SAP Front End ► SAP Logon*

SAP Logon

A dialog box similar to the one shown on the right appears. The list of systems may be longer than in the dialog box shown here. Select the SAP system specified by your lecturer and choose *Log on* or *Enter*.
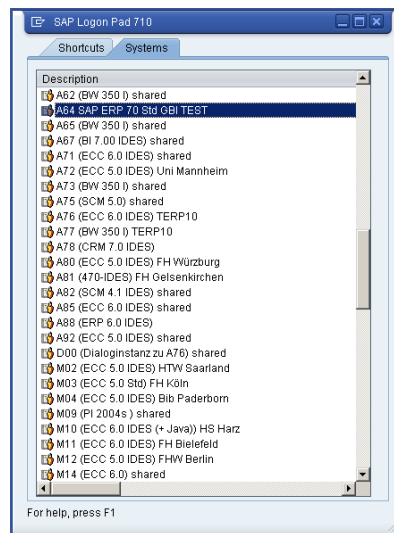
The logon screen appears. The system requests the client, your user, password, and preferred language.
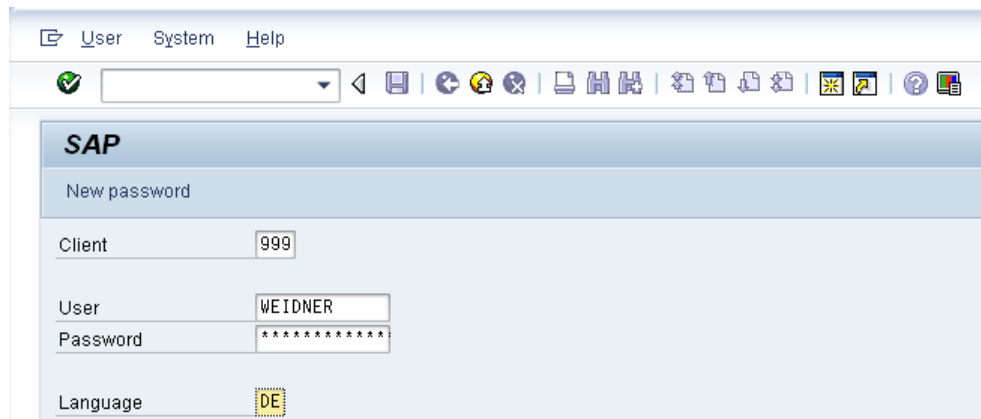
Client: _ _ _
User: _ _ _ _ _ _ _
Password: _ _ _ _ _ _ _
Language: _ _

Before you log on, you need to know the definition of the term "client."

Client

SAP systems are client systems. With the client concept several separate companies can be managed in one system at the same time.


Clients are the highest organizational level in the system. In business terms, each client can represent a group of companies, a company, or a firm – regardless of the size of the organization. In commercial, organizational and technical terms, a client is therefore a self-contained unit with separate master records and its own set of tables. In SAP systems, different clients are identified by their client numbers.

Use the client number given by your instructor. For you to be able to log on as a user, a user master record must be created for you in the relevant client. For reasons of access protection, you must enter a password when you log on. Your password entry is case-sensitive.

SAP systems are multilingual. Choose the language for your session in the Language field. Then choose 🌀 or *Enter*.

Logon screen

When you log on for the first time, the system requests you to change your password. To confirm your new password, choose ✔ or *Enter*.
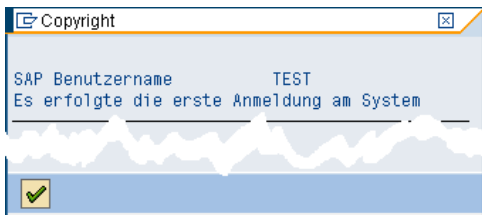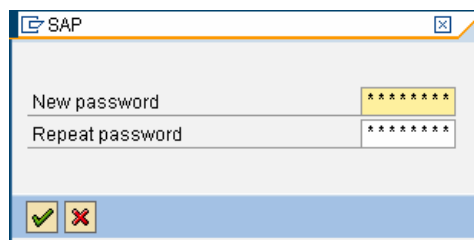
The first time you log on you will see a copyright note. Confirm it with ✔ or *Enter*. The initial screen with the SAP Easy Access menu appears.
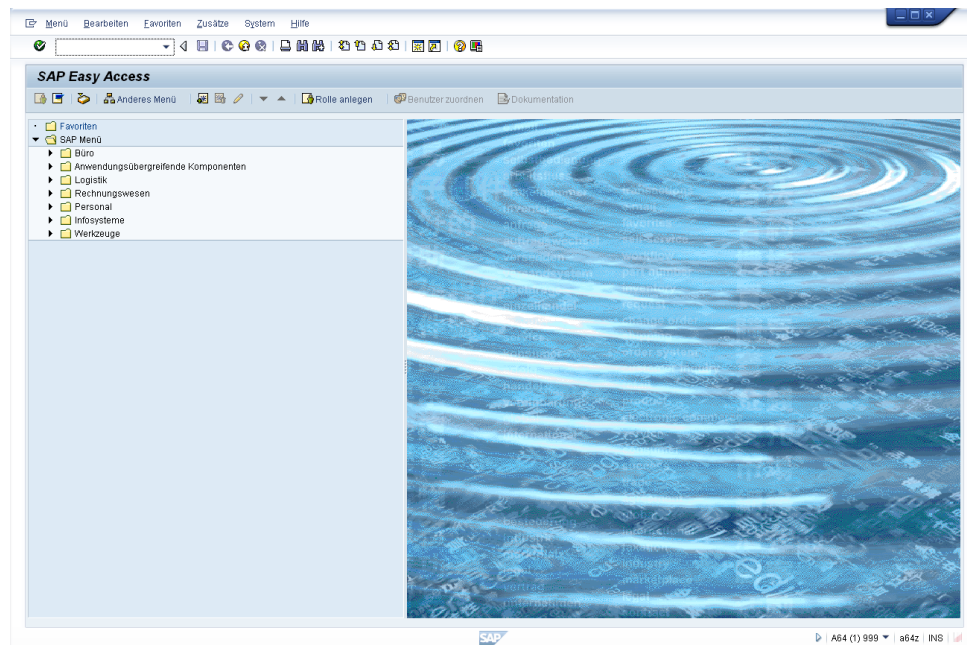
Initial Screen

Task Get familiar with the SAP system screen.   **Time** 10 min

Short Description Identify and familiarize with each element of the SAP system screen.

This is the initial screen as described in more detail below.

Initial Screen

Menu Bar

Menu Bar

Menus shown in the menu bar are related to the application you are using; that is, they are context-sensitive. Most menus have submenus.

Standard Toolbar

Standard Toolbar

Icons in the standard toolbar are available on all screens. Icons that you cannot use in the current application are grayed out. When you hover the cursor over an icon, a quick info text appears.

Title Bar

Title Bar

The title bar displays the name of the transaction you are currently using.

Application Toolbar

The application toolbar contains icons applicable to the transaction you are currently using.

SAP Easy Access Menu

The SAP system displays the SAP Easy Access menu on the start screen as standard. It enables you to navigate in the system using a clear tree structure. Click on the small arrows to expand the menu tree. The menu tree is specific to your role (business function in the company).

Status Bar

The status bar shows information about the current system status as well as warning and error messages.
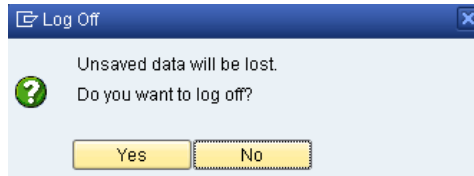
Logging off

Task Log off the system.   **Time** 5 min

Short Description Log off the SAP system.

Choose *System* ▶ *Log off* to end the current session. The confirmation prompt shown on the right informs you that unsaved data will be lost. Once you are certain that you have saved all entries, you can confirm the prompt by choosing *Yes*.

Log off

Introduction to ERP systems

Task Get familiar with the terminology of ERP systems.	**Time** 5 min
Short Description Get familiar with the terminology of ERP systems.	

Before you get started in the SAP system, you need to know the definition of various terms in the ERP context.

ERP terminology

Business scenario: a group of related business transactions belonging to a particular organizational area that fulfill a related purpose in the company, for example preparation of the balance sheet, personnel administration, purchasing, service, or production.

Business scenario

Organizational unit: organizational grouping of areas of the company that belong together for legal or other business reasons. Examples of organizational units are company, sales office, and plant.

Organizational unit

Master data: data stored in the system over a long period of time for business processes. Examples are customer, material, and supplier.

Master data

Transaction data: transaction-specific data that is short-lived and assigned to certain master data, for example a customer. Transaction data created when executing transactions is stored as documents. Examples of documents are sales order, purchase order, material document, and posting document.

Transaction data

Transaction: an application program that executes business transactions in the system, such as create sales order or post incoming payments.

Transaction

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Practical work with the SAP system

Task Get familiar with SAP's transaction and session concept.   **Time** 10 min

Short Description Run SAP transactions using three different ways. Create and close sessions.

There are three ways of calling transactions in the SAP system.   Transaction concept

SAP Easy Access Menu   SAP Easy Access Menu

You use the tree structure of SAP's Easy Access menu to navigate to a transaction. You then double-click on the transaction to run it.

Favorites   Favorites

If you use a transaction frequently, you can use drag&drop to add it to your favorites (or choose *Favorites ▶ Add*). You can then double-click it to run it without having to navigate through the SAP Easy Access menu. Read the Favorites chapter for more hints on the Favorites folder.

Transaction code   Transaction code

A transaction code is assigned to each transaction (not each screen) in the SAP system. The Transaction code chapter has more hints on displaying and finding these codes and other navigation options.

<u>Note</u>: The command field in   ▷   or   [▼] ◁
which you enter transaction
codes can be found in the top-left corner. Click the small arrow symbol to display/hide it.

The standard toolbar features five important icons: Icons

(also ✔)	Corresponds to the Enter key and confirms your entries
	Saves your entries on the current screen/transaction
	Corresponds to the Escape key and takes you to the previous screen
	Exits the current transaction
(also ✖)	Cancels the transaction (in case of system problems)

When you leave a transaction by choosing , , or , this dialog box may appear. Make sure that there is no unsaved data in your current session and choose Yes to acknowledge the message.

Back

You are about to exit.

Do you want to save your data for this material first?

Yes   No   ✖ Cancel
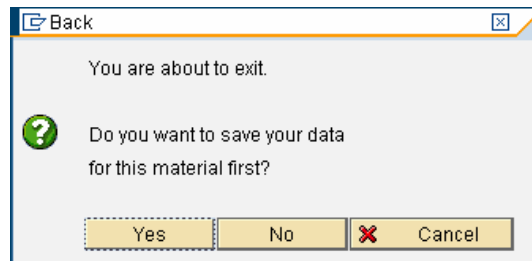
In some cases it makes sense to work with two or more transactions at the same time. In SAP systems, you can open up to six sessions simultaneously with real parallel processing.

Sessions

To open a new session, choose ⬛ or *System ► Create Session*.

To close a session, choose ⬛ or *System ► End Session*.

Help

Several types of help are available in the SAP system. The most frequently used ones are the F1 and F4 keys.

F1 and F4 help
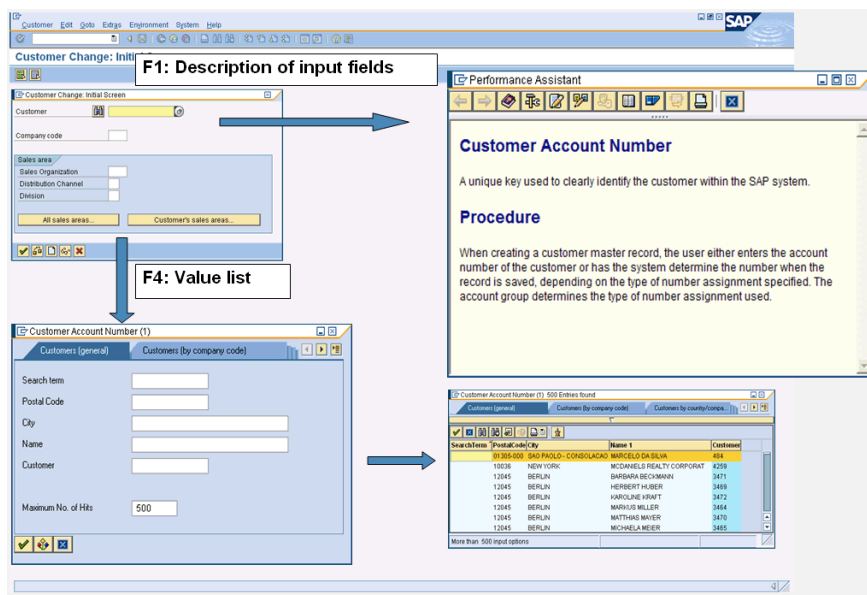
F1 provides you with explanations for fields, menus, functions, and messages. In the F1 help, you can choose ⛏ to get technical information.

F1

F4 gives you information and possible entries. You can also use the F4 help by choosing ⬜ directly right of a selected field.

F4

The Help menu contains more help. Choose *Application Help* for context-sensitive help on the transaction you are currently using. Choose *SAP Library* to open the online SAP Library. You can find it on the Internet at **help.sap.com**.

Help
- Application Help
- SAP Library
- Glossary
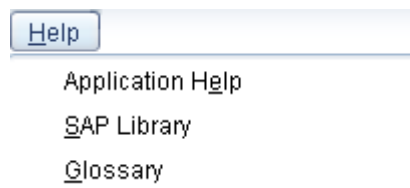
Choose *Glossary* to open the extensive glossary of SAP terminology.

Favorites

Task Get familiar with the SAP Favorites folder.   **Time** 5 min

Short Description Learn how to add and delete objects to the SAP Favorites folder.

Besides adding transactions to your favorites, as described in the *Practical work* chapter, you can add objects such as folders, reports, files, and Web addresses.

Other Objects

By clicking Favorites with the right mouse button, you can create your own hierarchical folder structure.
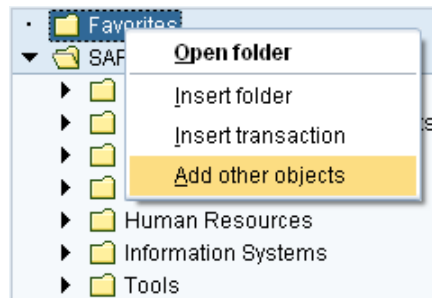
You can also add other objects (URL, BSP, mail system, SAPscript). You choose the applicable objects in the dialog box and enter the relevant data in the fields.

Here is an example of how to add a website to your favorites.

Website

To add the SAP UA Community Portal link to your favorites, click Favorites with the secondary mouse button. Choose *Add other objects* then Web Address or File. In the dialog box, enter a name and the URL shown below. To confirm, choose ✔.

Transaction codes

Task Get familiar with SAP transaction codes.   **Time** 10 min

Short Description Learn how to effectively make use of SAP transaction codes.

The quickest way to run a transaction in the SAP system is to enter the transaction code. Every transaction has a code, which generally has four characters. To find these, make the following settings.

Transaction code
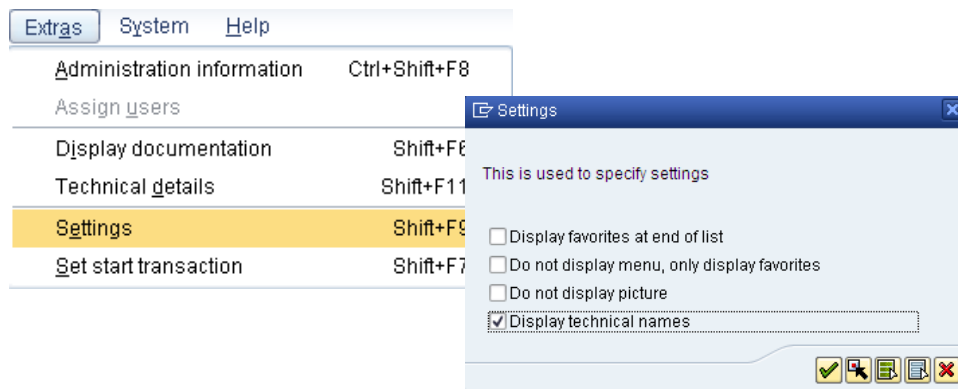
If you know the code for a transaction, you can enter it in the command field in the upper left corner of your screen. After choosing *Enter* the initial screen of the transaction appears.
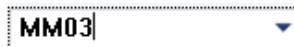
Transaction code field

You can use various control parameters to influence what happens to the session when you call a transaction.

/n	Exits the current transaction
/i	Closes the current session
/o	Opens a new session

/n

/i

/o

You may combine these with the transaction codes. For example, **/oMM03** opens a new session and calls transaction Display Material.

You can also search for transactions (or transaction codes) in the SAP system using transaction **SEARCH_SAP_MENU**.

SEARCH_SAP_MENU

Enter transaction code or menu text

Search text entry   Material

Choose a text you would like to search for in the SAP Easy Access Menu and click on ✔.

The search results are displayed in a list. There you find the transaction code (in some cases there are none assigned) and the path in the SAP Easy Access Menu (read from bottom to top).

Search for a Transaction Code or Menu Title

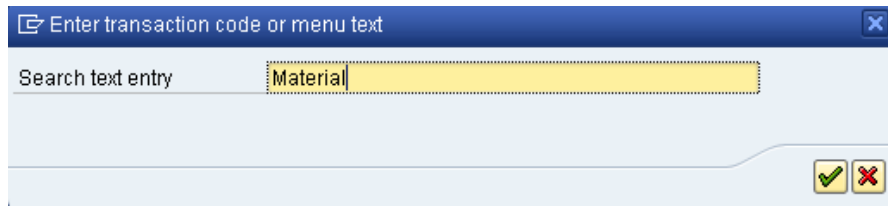| Node	Transaction code	Text
Nodes		Material Revision Level
Preceding node		Revision Level
Preceding node		Engineering Change Management
Preceding node		Cross-Application Components
Nodes	CCZU	Assign Material to Profile
Preceding node		Parameter Effectivity
Preceding node		Environment
Preceding node		Engineering Change Management
Preceding node		Cross-Application Components
Nodes	CL6G	Material from Standard
Preceding node		Copy Standard
Preceding node		Environment
Preceding node		Classification System
Preceding node		Cross-Application Components
Nodes		Materials Management
Preceding node		Logistics
Nodes	ME2M	By Material
Preceding node		List Displays
Preceding node		Purchase Order
Preceding node		Purchasing
Preceding node		Materials Management
Preceding node		Logistics

Exercises

Task Get familiar with navigation using practical exercises. **Time** 20 min

Short Description Apply what you have learned in the SAP system.

After completing these exercises you will be able to *Learning objectives*

- log on to an SAP system,

- identify transaction codes,

- access information in the SAP library,

- use the F1 and F4 help,

- make various user-defined settings and

- maintain your Favorites folder.

1. Log on to the system

Log on

Choose the system used for this course in your SAPGui. Use the client, user name, initial password, and logon language given by your instructor. When you log on for the first time, a dialog box appears in which you enter your new individual password twice.

Client: _ _ _   User: **GBI-###**   Password: **gbiinit**

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2. User-defined settings

User-defined settings

2.1 In the menu bar, choose *Extras ► Settings* and select the indicator *Display technical names*.

2.2 In the standard toolbar, choose 🖼 (far right). Under Options, select both check boxes „Dialog Box at Success Message" and „Dialog box at Warning Message ".
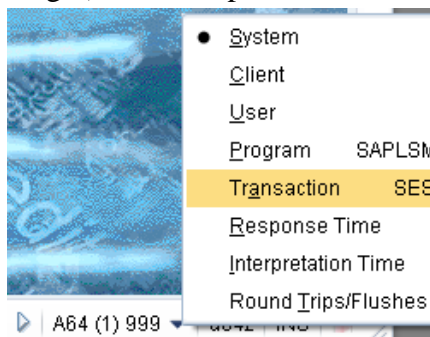
2.3 In the status bar, on the far right bottom click on the triangular symbol and choose *Transaction*. After doing so, the code of the transaction you are currently using is always displayed.

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3. Sessions

What is the maximum number of sessions (windows in the SAP system) that you can open in parallel?

Number: _____

Close all but two sessions.

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4. Transactions

What are the names of the transactions that you reach from the SAP Easy Access Menu and what are the transaction codes for calling them?

Logistics ► Materials Management ► Material Master ► Material ► Display ► Display Current

Transaction title: _____

Transaction code: _____

Accounting ► Financial Accounting ► Accounts Receivable ► Master Records ► Display

Select Customer **1000** in Company Code **US00** and press *Enter* or ✔.

Transaction title: _____

Transaction code: _____

What transactions do you call with the following transaction codes?

VA03: _____

MMR1: _____

ME01: _____

MM02: _____

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5. Favorites

To organize your favorites in folders you first need to create folders (topic areas): *Favorites ► Insert Folder*. Give the folder a name. You can create as many folders as you like. You can move folders using drag&drop.

To create favorites, find particular functions (transactions) in the SAP Easy Access menu you need for your daily work. Select a transaction and choose *Favorites ► Add* to add entries to your favorites list. You can also move them (*Favorites ► Move*). Moreover, you can add and move favorites using drag&drop.

Add the following transactions to your favorites.

MMR1 – Create Raw Material using menu path:

Logistics ► Materials Management ► Material Master ► Material ► Create (Special) ► Raw Material

MM03 – Display Material using menu path:

Logistics ► Materials Management ► Material Master► Material ► Display ► Display Current

To add URLs click on Favorites in the SAP menu with the secondary mouse button and choose *Add other objects*. Choose *Web Address or File* and confirm by pressing *Enter*.

Create a link to the SAP UA Community portal!

  http://uac.sap.com

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6. Help

F1 help

Run transaction **VA01** and click in the *Sales Organization* field. Then, press the F1 key.

What is a sales organization (in a few key words)?

_____

_____

_____

F4 help

Close the dialog box with the definition of a sales organization. Do not leave the initial screen of transaction **VA01**. Click in the *Distribution Channel* field. What are the names of the first three distribution channels listed and which sales organization are they assigned to?

	SOrg	DChl	Name
1.			
2.			
3.			

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7. Parameter settings

Choose *System ► User Profile ► Own Data*. On the Maintain User Profile screen, choose the *Parameters* tab.

In a second session, choose:

Logistics ► Materials Management ► Inventory Management ► Goods Movement ► Goods Issue

Enter Goods Issue: Initial Screen

New Item   To Reservation...   To Order...   WM Parameters...

Document Date	07/16/2010	Posting Date	07/16/2010
Material Slip			
Doc.Header Text			

Defaults for Document Items

Movement Type		Special Stock	
Plant		Reason for Movement	
Storage Location		☐ Suggest Zero Lines	

GR/GI Slip

☐ Print

    ○ Individual Slip
    ⦿ Indiv.Slip w.Inspect.Text
    ○ Collective Slip

In the *Enter Goods Issue: Initial Screen,* click in the *Plant* field and choose F1. In the Performance Assistant screen that is displayed next, click on the 🔧 symbol to view technical information. Note down the parameter ID given in the Technical Info screen.

Switch to the first session.

Enter the parameter ID and the associated plant (ask your instructor). Confirm by choosing *Enter*. Do not leave the screen.

Repeat the procedure above for the *Storage Location* field. Ask your instructor for the correct value again.

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Solutions

Task Get familiar with navigation using practical exercises.   **Time** 10 min
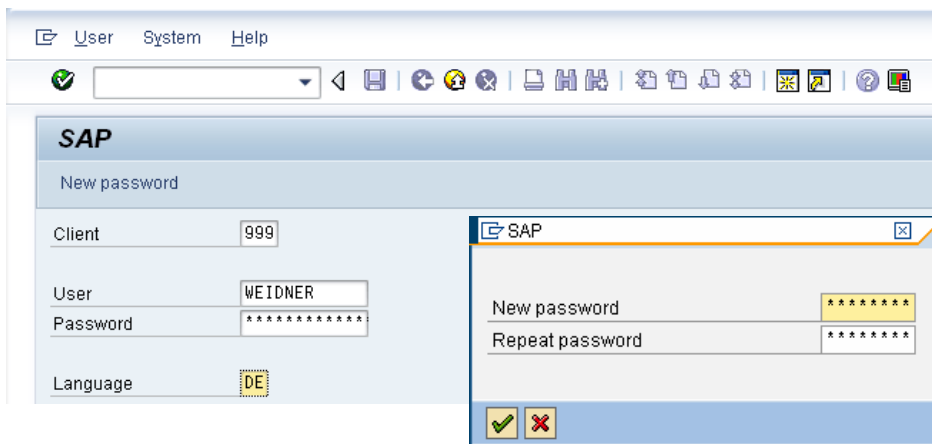
Short Description Apply what you have learned in the SAP system.

1. Log on to the system

Log on   Log on

Log on to the client indicated by your instructor and change your initial password.

2. User-defined settings

User-defined settings

Make the user-defined settings described in the exercise.

3. Sessions

Sessions

To open and close sessions, choose *System ▶ Create Session* (or ⬛) and *System ▶ End Session*.

Depending on the SAP system settings between 2 and 30 sessions can be opened in parallel. The default value is set to a maximum of **six** parallel sessions per user.

4. Transactions

Transactions

Logistics ▶ Materials Management ▶ Material Master ▶ Material ▶ Display ▶ Display Current

Transaction title: Display Material (Initial Screen)

Transaction code: MM03

Accounting ▶ Financial Accounting ▶ Accounts Receivable ▶ Master Records ▶ Display

Transaction title: Customer Display (Initial Screen)

Transaction code: FD03

VA03:   Display Sales Order: Initial Screen

MMR1:   Create Raw Material (Initial Screen)

ME01:   Maintain Source List: Initial Screen

MM02:   Change Material (Initial Screen)

5. Favorites

Choose *Favorites ► Insert Folder* to create a folder with a name of your choice.

Add transactions **MMR1** and **MM03** to your favorites.

Create a link to the SAP UAC portal (http://uac.sap.com) in your favorites.

6. Help

F1 help

A sales organization is an organizational unit responsible for the sale of certain products or services. The responsibility of a sales organization may include legal liability for products and customer claims.

F4 help

SOrg	DChl	Name
DN00	IN	Internet
DN00	WH	Wholesale
DS00	WH	Wholesale

DN00 is the sales organization for Northern Germany, DS00 for Southern Germany. Accordingly, UE00 is GBI's sales organization for the Eastern US and UW00 for the West.

Please note that GBI's distribution channels are not always assigned to all sales organizations.

7. Parameter settings

To determine the parameter IDs of the *Plant* and *Storage Location* fields, proceed as described in the exercise. Enter the parameter IDs and the values given by your instructor in the parameter list.

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