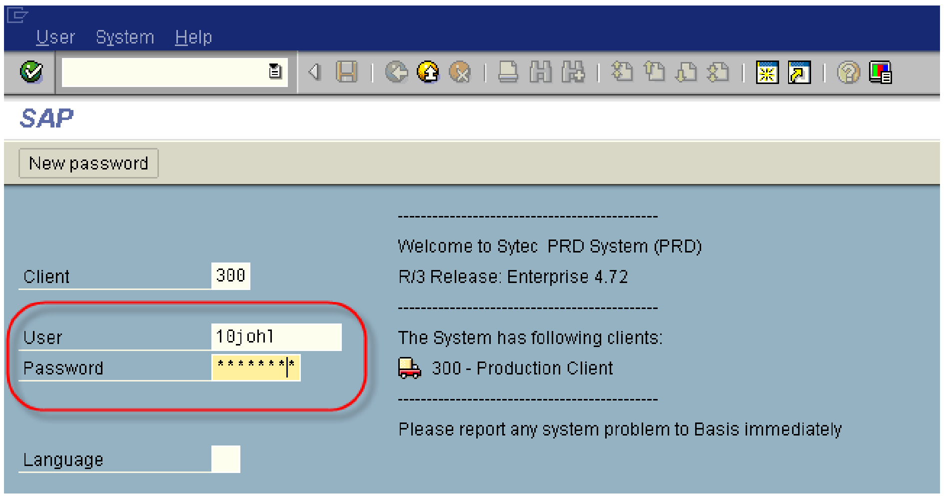
LOGGING IN AND PASSWORDS

Open the SAP software to log in.

- On the very first screen make certain to highlight PRD (stands for production) and click the Login button.
- Enter the user ID you were provided.



Click in the User field to type your user name. *(Note: All BU User IDs start with the number 10, the identifier for BU. Each university has a 2 digit identifier which precedes a user ID.)*

Tab to, or click into the Password field. Type the password you were provided. Note: Type directly over the asterisks. The asterisks will remain in view. You do not need to delete them.

Press ENTER or click on the green checkmark icon.

You will immediately be prompted to set a new password. Keep these things in mind when creating your new password:

- Passwords must be a minimum of 7 characters.
- Passwords cannot begin with the first 3 digits of your logon ID (example: If I'm logging on as 10johl, I could not choose a password starting 10j).
- You will be alerted to change your password every 30 days.
- When changing your password, you cannot use the last 5 passwords you used. This is for security purposes.
- **Tip: *You may wish to keep a log of your passwords. Please keep them stored in a safe place!***

CORRECT SETTINGS FOR YOUR SOFTWARE

SAP Menu View

Click on the word "Menu" across the top menu bar. Then choose SAP Menu. (The option called User Menu will show all the transactions that you have access to).

Importing Favorites

To pull in folders which contain all the transaction codes you will need to have access to (Favorites), do the following:

- Click on the word “Favorites” across the top menu bar.
- Choose the function “Upload from PC.”
- In the next window, under “Look In” go to the S drive.
- Under the BU Documents folder, double click on the folder called SAP.
    - Double click on the document called budget.doc if you will be doing budget transactions.
        - You will now have a subfolder called Budget in your Favorites folder. Note when you double click on the Budget folder, you will see 2 subfolders (Parking Transfer Requests and Reports).
    - Double click on the document called purchasing.doc if you will be doing purchasing requisitions and putting on orders from the storeroom. Click “Append” if a window appears.
    - Double click on the document called payroll.doc if you will be doing payroll. Click “Append” if a window appears.
    - Double click on the document called travel.doc if you will be doing funds reservations (travel, food reservations or miscellaneous requests). Click “Append” if a window appears.

Display of Technical Names (Transaction Code Names)

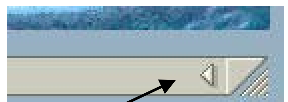
Click on the word “Extras” across the top menu bar. In the drop down menu, choose the word “Settings.” When the little window appears, make certain there is a checkmark in the feature called “Display Technical Names.” Then click on the green checkmark. This will enable you to see transaction code names.

- Note: There are other settings under “Extras” such as “do not display picture” which will take the blue whirlpool picture off your main SAP window. Customize your screen as you wish.

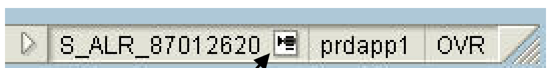
Purchase Requisitions
If you will be putting purchase requisitions on the system, it is critical that you perform some desktop setup so your screens are correctly configured. You will be provided instruction on how to do this once you meet with the Purchasing trainer.

Status Bar View (bottom right of your screen)

If your screen looks like this:



Click on the arrow pointing left, which will expand that portion of the window to look like this:

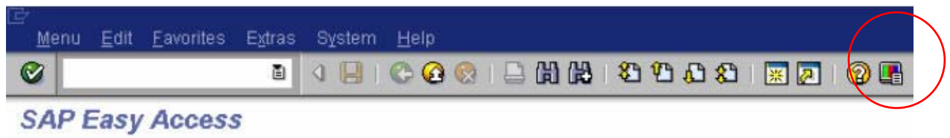


Next, click on the little tablet icon and when the drop down menu appears, click on the word Transaction" – that will ensure that a transaction code shows for whatever transaction screen you are working in.

IMPORTANT SETTINGS FOR LOCAL DATA

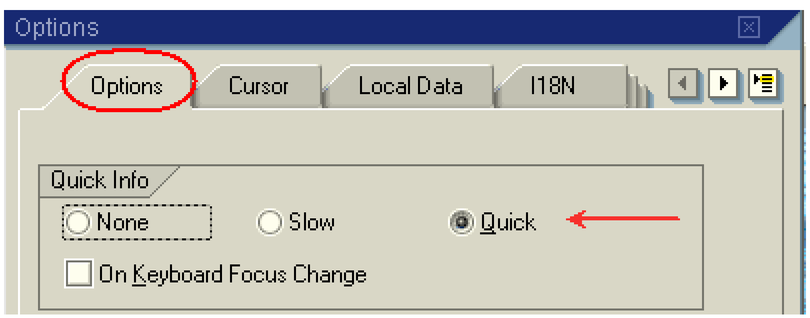
- Show history of previously entered data fields (user ID, fund center, commitment codes).
- To ensure proper settings for file sizes (very important step to do)!

Click on the Customizing Local Layout icon (last icon on the right), as illustrated below:



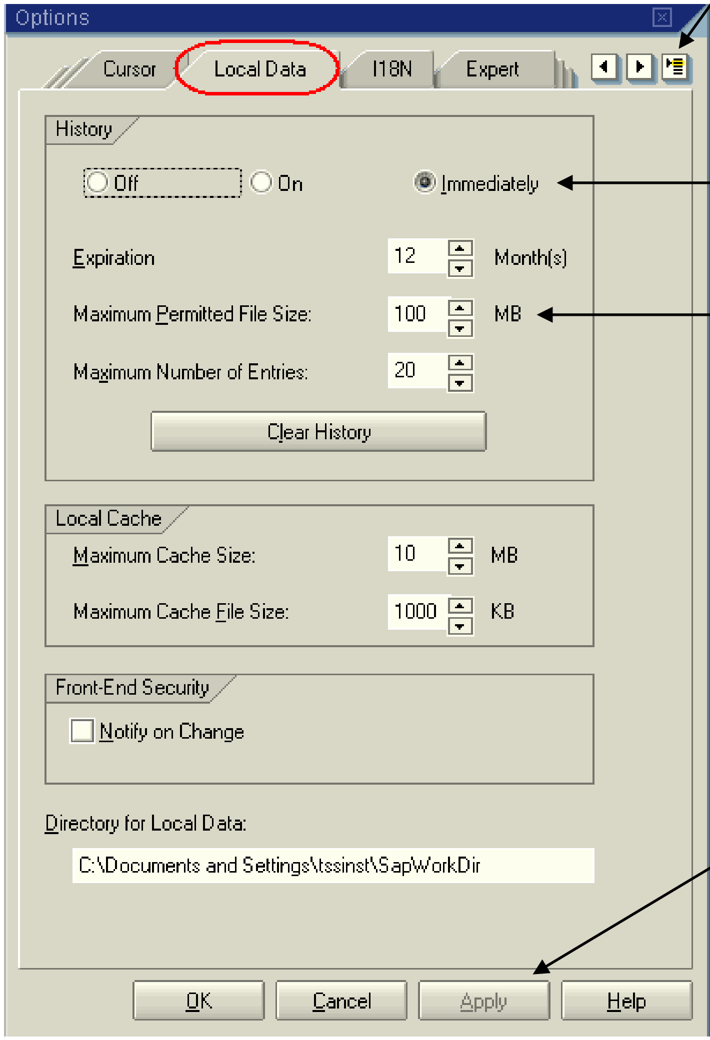
This should place you on the screen called "Options."

Click the button next to "quick" - this will ensure that your cursor displays text information explaining what each icon does when you roll your cursor over top of an icon.



Click Apply near the bottom of the screen.

Next, click the Local Data tab.



Click this button to view all tabs available in this window. Click on desired tab to move there.

Make sure this button is defaulted to "Immediately"

Make sure Maximum permitted file size is set to 100 MB.

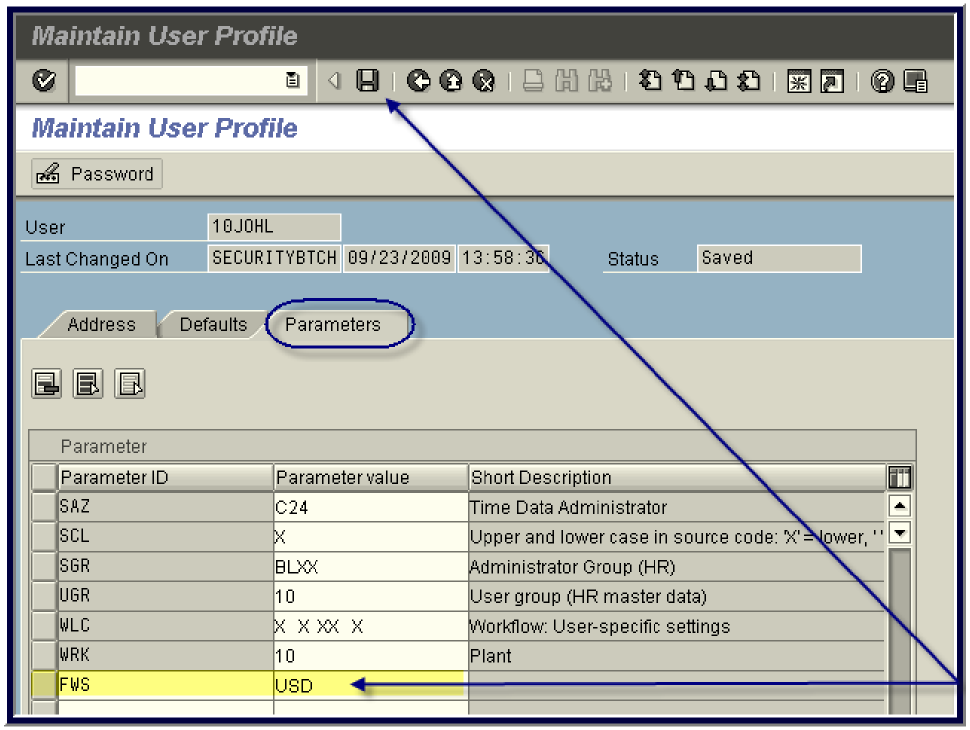
Click on the Apply button to save changes! Then click OK to return to the SAP menu.

DATE AND DOLLAR DEFAULTS

To ensure your date defaults (i.e., 1/8/2009) and USD dollar defaults are correct:

Across the SAP Menu bar, choose the word System.

- Choose User Profile. Choose Own Data.
- Click the tab called Parameters



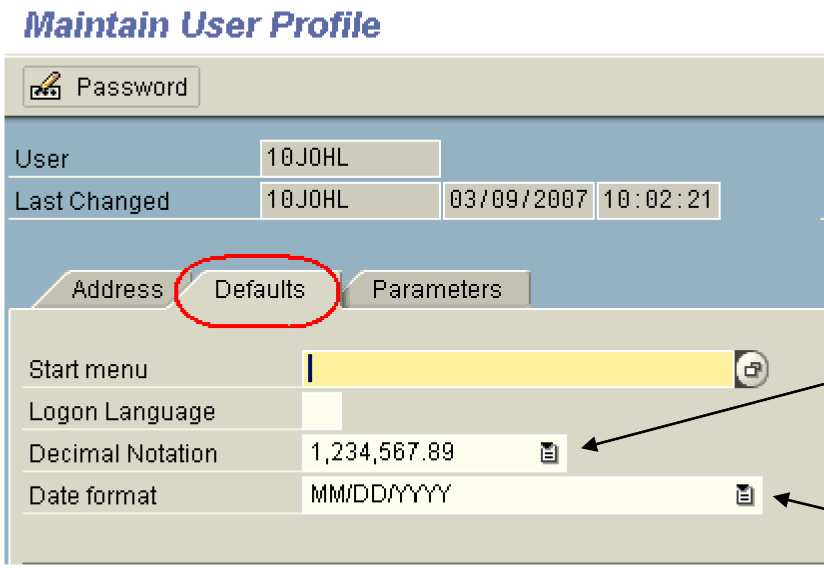
Scroll down the list until there's an empty space to type on.

- Under Parameter ID, type FWS
- Under Parameter Value, type USD

Click the red disk icon at the top of the page to Save this setting.

Across the SAP Menu bar, choose the word System.

- Choose User Profile. Choose Own Data.
- Click the tab called Defaults



Decimal Notation should be like this. If it is not, click on the dropdown icon and change.

Date format should be like this. If it is not, click on the dropdown icon and change.

PRINTER SETUP

Some SAP windows will allow you to print. However, your software must be set up to do this. Follow these steps:

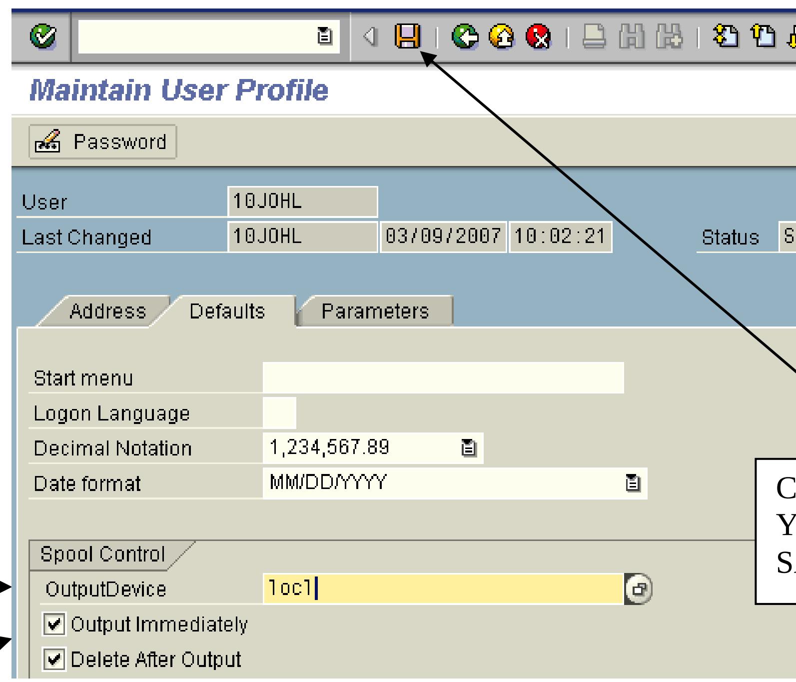
Click on the word “System” from the main SAP menu. Choose “User Profile” - “Own Data”

Click on the middle tab called Defaults

You can set your printer up one of two ways, by defining a local printer <u>or</u> defining a network printer.

Local printer setup

This setup will assure your print job goes to whichever printer is defined as your default printer.



Click Save icon when done! You will be returned to the SAP main menu.

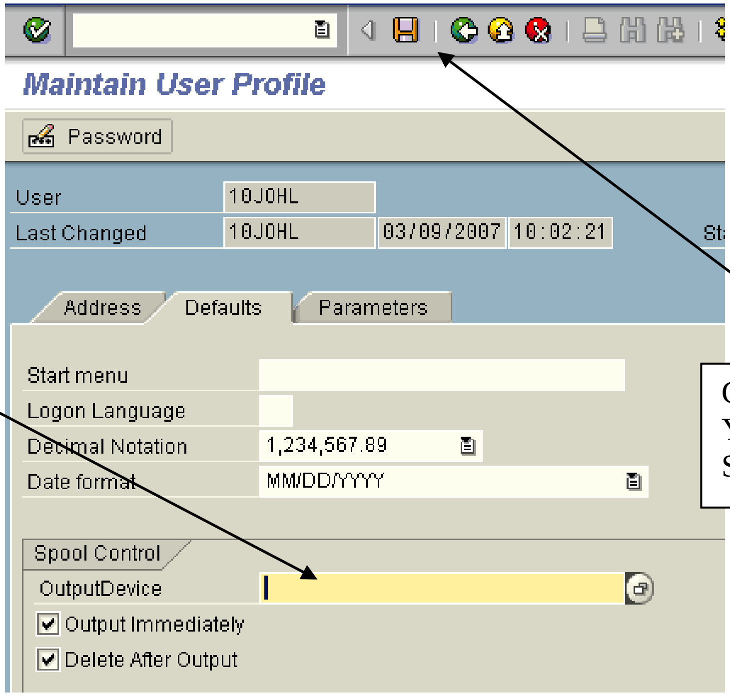
Type **locl** in OutputDevice field.

Place checkmarks in Output immediately and Delete after output.

Network printer setup

Click in field by OutputDevice.
Click on drop down icon, on the right side.
In search window, type 10* and press Enter.
Scroll down to look for your printer. If you find it, double click on your printer.

Place checkmarks in Output immediately and Delete after output

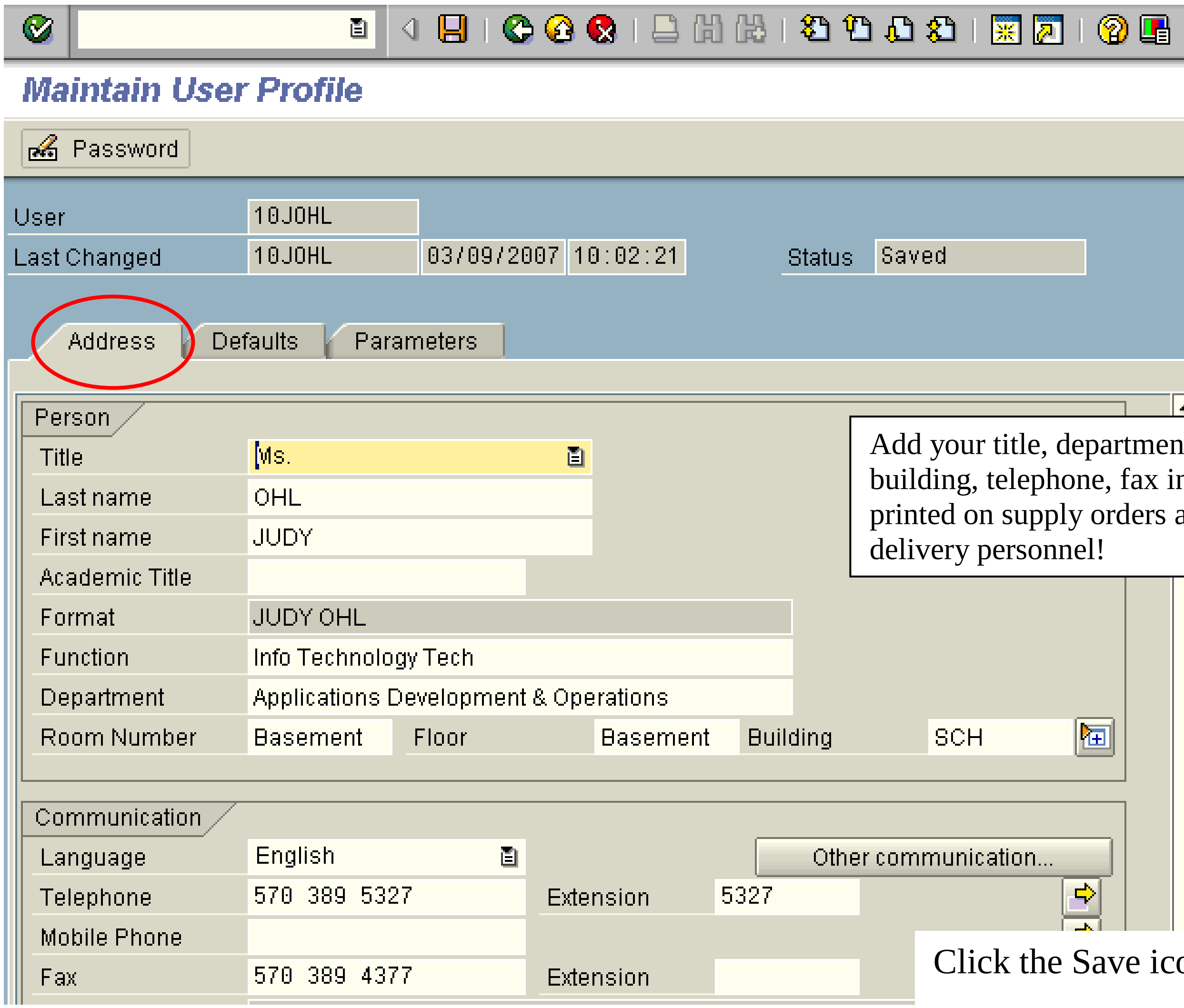


Click Save icon when done! You will be returned to the SAP main menu.

NOTE: You may call the Help Desk (4357) if you are unsure of your network printer name.

ADDING PERSONAL INFO TO YOUR USER PROFILE: Across the SAP Menu bar, choose the word System.

- Choose User Profile. Choose Own Data.
- Choose the Address Tab.



Add your title, department, room no., floor, building, telephone, fax info. This info will be printed on supply orders and is helpful for delivery personnel!

Click the Save icon when finished.

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 with circle below) where transaction codes can be entered.

Note the little triangle pointing to the left. If you click on this it will close the white box. Try that. Then click it again so it opens.

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 picture 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 below. In addition, these buttons/icons are explained in further detail later in this course.

STANDARD TOOLBAR (Buttons/Functions)

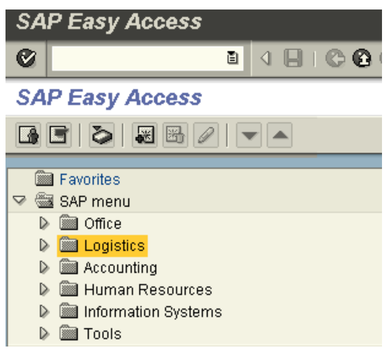
Button	Name	Function
	Enter	Confirms the data you have selected or entered on the screen. Same function as the Enter key. ***IMPORTANT! DOES NOT SAVE YOUR WORK. YOU MUST USE THE SAVE ICON FOR THAT!***
	Command field	Allows you to enter transaction codes to go directly to a transaction.
	Save	Saves your work. Same function as *Save* in the *Edit* menu.

Button	Name	Function
	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 *Cancel* in the *Edit* 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 CTRL + Page Up keys.
	Previous page	Scrolls to the previous page. Same function as the Page Up key.
	Next page	Scrolls to the next page. Same function as the Page Down key.
	Last page	Scrolls to the last page. Same function as the CTRL + Page Up key.
	Create session	Creates a new SAP session. Same function as *Create session* in the *System* menu.

Button	Name	Function
	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.

HOW TO DRILL DOWN THE SAP MENU: You have already imported folders under your Favorites area because these were readily available to you. What if you had to search for a transaction in SAP that wasn't available in the current setup?

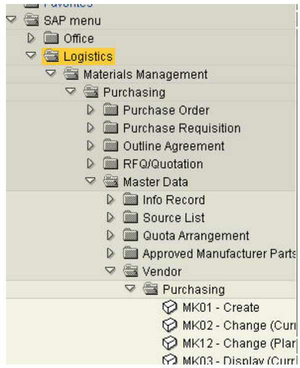
You would have to do a process called "drilling down" to get to the correct area. Drilling down is opening a series of folders and subfolders to get to a transaction you need. You would drill down under the SAP menu.



If you click on a series of folders and subfolders under Logistics you would find purchasing related transactions.

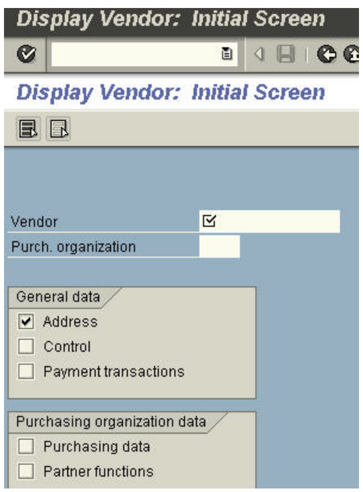
To do an exercise of drilling down to get to an area where we can look up a vendor number. Drill down by clicking on the arrow next to:

- Logistics
- Material Management
- Purchasing
- Master Data
- Vendor
- Purchasing



Notice the white cubes by functions now. That means you've drilled down to the point where you have screens to perform an action.

Double click on MK03 for Display. The following screen appears:



You will receive instruction in how to access all the transactions you have responsibility for.

NOW, PRESS THE BACK BUTTON TO GO BACK TO THE SAP EASY ACCESS MENU.

CREATING A FAVORITE: You see how to drill down to get to a transaction screen. You would not want to go through all those steps each time you needed to get to a transaction.

A favorite operates like a bookmark in an Internet Browser. It 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.

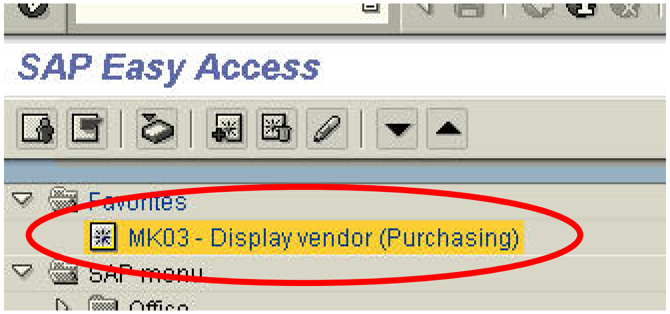
There are several ways to add a favorite. The easiest way to do this is to follow these steps:

- Right mouse click on the Favorites folder. Choose Insert transaction. At the prompt, type the transaction code (example: MK03) and press Enter.

Other ways to create a favorite:

- Drill down to find the transaction, click on it to highlight it. Click on the word *Favorites* on the menu bar. Click on *Add.*
- Drill down and then click on the transaction code (MK03). Hold down your left mouse button and drag it to the Favorites folder (top of folders list) and drop it there.
- Use the icon for creating a favorite.

Once you've created a shortcut, you can find it directly under your Favorites folder. Now, instead of drilling down each time to use a transaction, all you need to do is click on that line item.



CUSTOMIZING YOUR FAVORITES

You can change the name of a Favorite, by right mouse clicking on it. Choose the function "change favorite" – revise the line to read how you want it and click on the green checkmark.

CREATING YOUR OWN FOLDERS UNDER FAVORITES:

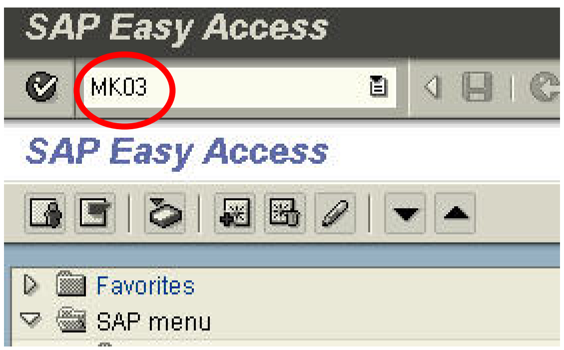
You can create folders to organize your favorites. For example, if you wanted to create 6 "favorites" and put them in a folder called Budget follow these steps:

- **Right mouse click on the folder called Favorites; choose "insert folder." Name it whatever you wish it to be.**
- **Create your "favorites" and then drag them into the folder you just created.**
- **Note: If you wanted subfolders under the main Budget folder, you would right mouse click on the Budget folder and choose "insert folder" to create a new subfolder. Move the transactions into whichever folder or subfolder you choose.**

ENTERING A TRANSACTION CODE IN THE COMMAND FIELD:

Another thing you can do instead of drilling down is use the transaction code associated with a transaction screen. Example: MK03 is the transaction code for Display Vendors.

You can enter this number directly in the *Command Field* (circled in red below).



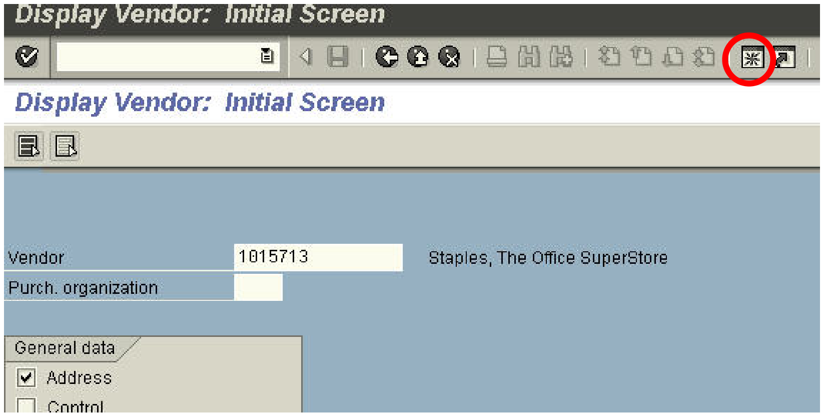
Once you enter the code, click on the green checkmark (next to the command field) or simply press the Enter key, and you will go right to that screen.

PAGING:

You can use the 4 paging icons to move through a long list or report. Roll your cursor over top of these icons to see what each one will do.

CREATING A NEW SESSION: Depending on the roles you perform, you may be involved in doing several transactions in the SAP system.

A nice feature of the software is the ability to create new sessions. This would come in handy if you had 1 transaction open and needed to do another transaction. You would simply use the "starburst" icon as circled below. This would open a new window.



You are able to have two, or more, windows open at the same time. *This may be dependent on how much memory your computer has.*

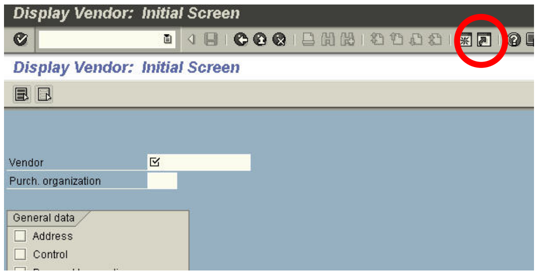
Once you have several sessions open, you can switch between the windows by:

- Pressing the ALT key (and keep holding it down).
- Hitting the TAB key to move to the other window(s).

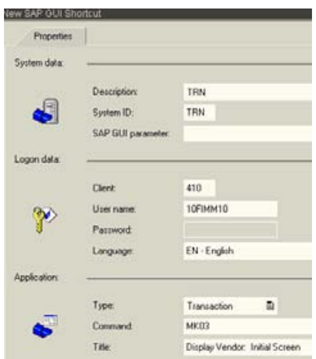
CREATING A SHORTCUT ON THE DESKTOP

Another thing you can do is create a shortcut on your desktop for frequently used transactions.

- While in a transaction that you wish to create a shortcut for, click on the *Generate a Shortcut* icon (as circled below):



This will cause the following pop-up window to appear:



NOTE: You may not be able to see bottom of this window because the task bar hides it. To hide the task bar and open more space, right click on the Start button – click properties. Choose Taskbar tab. Checkmark auto-hide task bar and click ok.

Once you press Enter a shortcut will be placed on your desktop.

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 following screen shows the message generated by the system after a purchase requisition was changed:

- ➢ The circle on the left hand side of the screen indicates that the purchase requisition # has been changed.
- ➢ The circle on the right hand side of the screen indicates the system information.

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:

If you have not completed all the required input fields on a screen, the SAP system displays an error message in the status bar (bottom of screen). At the same time, it places the cursor in the required input field so that you can make the necessary data entry.

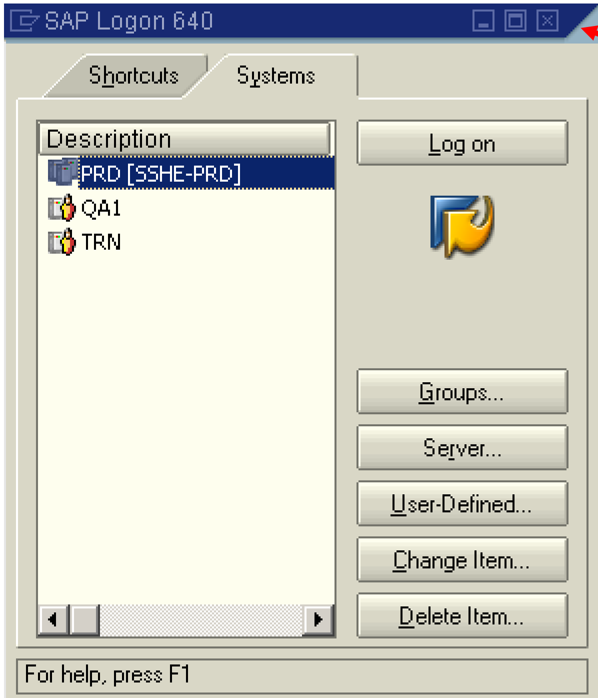
SWITCHING SCREENS QUICKLY: If you are finished with one transaction and wish to go to another transaction quickly, without first going to the main menu, you can use a shortcut. **<u>While in a transaction</u>**, type /n plus the next transaction code in the Command Field. It's not necessary to place a space between the /n and the transaction code. Your screen will look like this:

After you've typed the /n with the new transaction code, press Enter or click the green checkmark icon. You will be in the new transaction.

LOGGING OFF:

- Click on *System* and choose Logoff.
- You can also logoff by clicking the X button in the upper right corner of the screen.

IMPORTANT NOTE ON LOGGING OFF: Once you log off SAP, you will still have a little window open.



There is 1 way ONLY to close this window. Click on the X in the upper right corner.

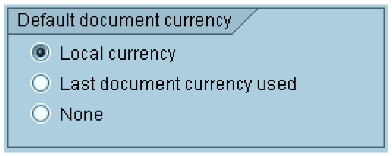
NEVER click the Delete button in this section…that will get rid of whatever item under Description that you had highlighted (PRD)!!

When you log off a message pops up stating, "Unsaved data will be lost. Do you want to log off?" Please be assured it is fine to choose "Yes" if you have already safely posted (or saved) the transactions you were working on.

ADDITIONAL TIPS

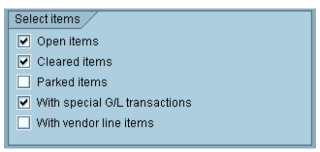
RADIO BUTTONS AND CHECKBOXES: To enter information in the SAP System, you must sometimes select among several options. In some cases, you can select only one option; in other cases, you can select more than one.

- When you are limited to only <u>one option</u>, **radio buttons** identify the options:



  - To select an option, click the radio button next to that option.
  - 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.

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



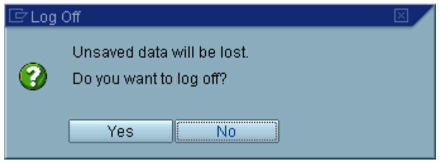
  - To select one or more options, click the checkbox next to each desired option. The selected checkboxes now contain a checkmark.
  - To deselect a checkbox containing a checkmark, click it again. The checkmark disappears.
  - To select a checkbox using the keyboard, use the *Tab* key to go to the group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