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Welcome to the SAP System

The ERP 2005 System is the Client Server version of SAP.



What does the catchphrase "**Client Server**" mean?

A **client** is a self-contained unit within the ERP 2005 system with separate master records and sets of tables. A **server** is a data station in a local network, which performs particular functions within the network.

The client you will be working in is dependent on the role of task to be performed. For example, during a training session, you will most likely be working within a Training client so as not to "contaminate" the data in the Production client. The Production client is the live-working environment, the data of which needs to remain pristine. Your instructor or system administrator will instruct you as to which client you should utilize.

The Client concept enables the joint operation, in one system, of several enterprises that are independent of each other in business terms. During each user session, you can only access the data of the client selected during the logon.


Who should take the Basic Navigation Training Course for ERP 2005?

Anyone just starting out, in terms of working within the SAP Environment, should take the ERP 2005 Basic Navigation Training Course. The basic techniques and procedural information to be taught in this course will be utilized in all SAP applications.

Fundamentals

Using the ENTER or RETURN Key

In the instruction of this course, you will be instructed to use the **ENTER** key on your keyboard. If your keyboard does not have an **ENTER** key, use the **RETURN** key on your keyboard. On many keyboards, the keys may be used interchangeably.

The ENTER  icon is an ever present symbol on the views in the system. Whenever an instruction calls for you to press the **ENTER** key on your keyboard, you may utilize this icon instead by clicking on it once with the left mouse button. Pressing the **ENTER** key on your keyboard performs the exact same function as selecting this icon with the left mouse button.

About the screens in the Manual

The screens utilized in this manual have been captured from the Standard SAP Environment. Because the system may be customized for each individual company's needs, the views on your monitor may appear slightly different than the views depicted in this manual. The differences, however, do not and will not affect the manner in which you work within the SAP Environment.

Entering data in fields

A field is a single unit of information, such as customer's name or account number. Most views in the system contain fields in which you enter data or that provide information for the user.

To enter data into a field, position the cursor in the field and click once with the left mouse button to activate the field, and then proceed to key in the requisite data. Make certain that the cursor is positioned at the beginning of the field. If a field is already populated, you may simply key in data over the existing entry. Keep in mind that depending on the configuration of your system, some fields contain default data that is for display only; consequently, you cannot change or delete data in these fields.

Moving from field to field

After you enter data in a field, or when you wish to skip a field, use the following keys to navigate between fields.

TAB Moves the cursor to the beginning of the next field.

SHIFT + TAB Moves the cursor to the beginning of the previous field

You may also move the cursor to any field or position within a field by using the mouse or the arrow keys on your keyboard.

Logging on & off

Logging on for the first time - Requirements

To logon to the SAP System for the first time, you will need the following:

- A Client Number (provided by your system administrator or instructor)
Client number: _____
- A User Name (provided by your system administrator or instructor)
User Name: _____
- An Initial Password (provided by your system administrator or instructor)
Initial Password: _____
- Your own Password (keep confidential)

Creating your own Password

To create your own Password, follow the guidelines below:

- Use any combination of characters (for example, a thru z, 0 thru 9, or punctuation marks)
- Use at least 6, but no more than 40 characters
- Do not begin with a question mark, an exclamation point or a blank space
- Do not begin with three (3) identical characters
- Do not include any sequence of three characters that are contained in your user name
- Do not use "pass" as your password
- Must be different from the last 5 passwords



NOTE:

- Your password **is** case sensitive!

Steps for Logging on the First Time

In the steps below, and throughout the documentation of the manual for this course, you will be instructed to hit the **TAB** key on your keyboard following the entry of data into a field in order to move to the beginning position of the next data field.

Step 1: Accessing the Logon Screen



NOTE:

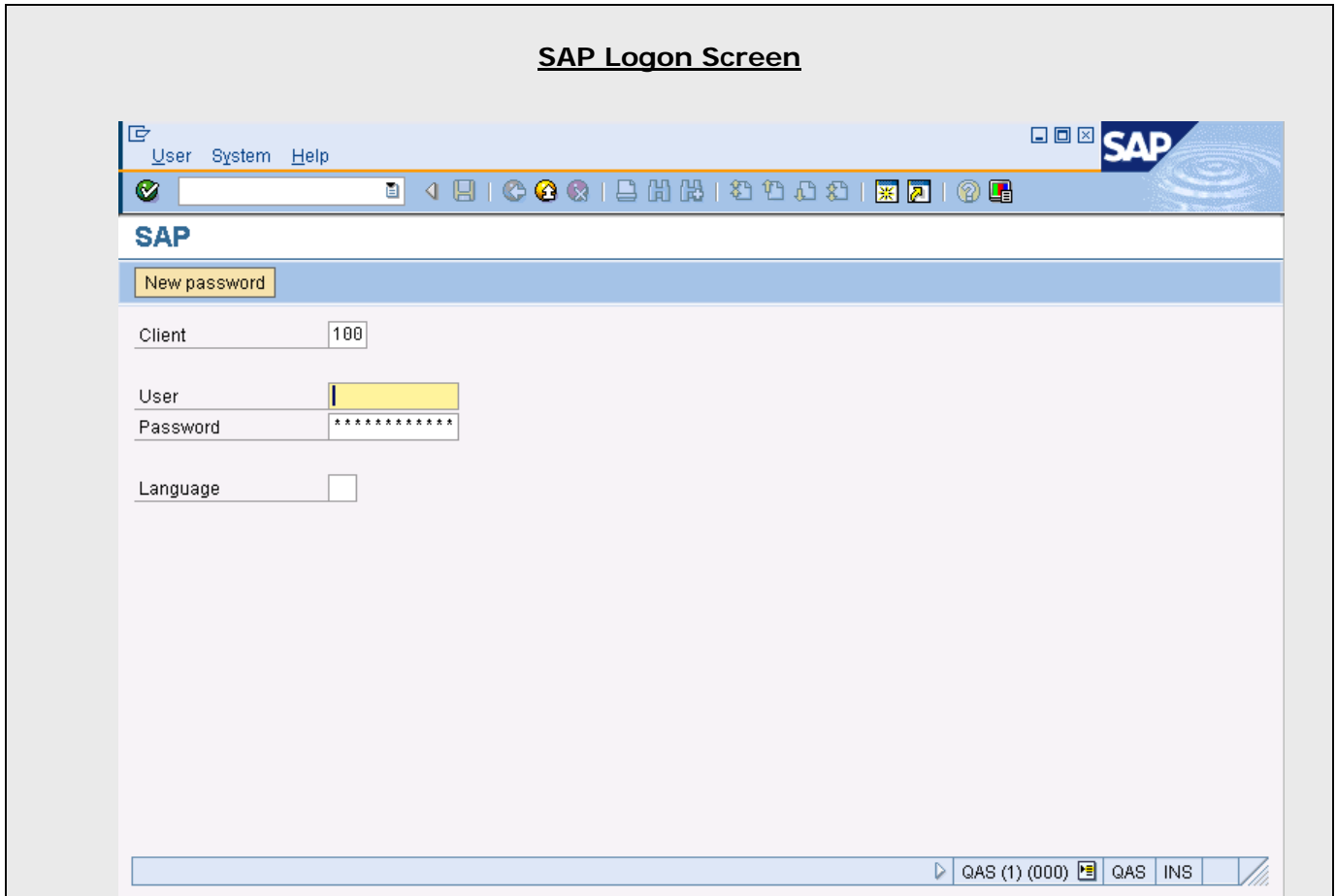
- The approach to be taken in terms of accessing the Logon screen (an example of which is shown below) will invariably be different for each client and training session. Your instructor will provide the guidelines necessary to access the logon screen.
- Once access to the SAP logon screen has been realized, continue with the documentation provided on the following page.

The screenshot shows the SAP logon screen within a window titled "User System Help". The SAP logo is visible in the top right corner. A "New password" button is highlighted in yellow. The form contains the following fields:

- Client: 100
- User: (empty field)
- Password: (masked with asterisks)
- Language: (empty field)

The bottom status bar displays "QAS (1) (000) QAS INS".

Step 2: Populating the SAP Logon Screen




- I. In the **Client** field, enter the client number provided by the instructor; then press the TAB key to move the cursor to the **User** field.
- II. In the **User** field, enter your username; then press the TAB key to move the cursor to the **Password** field.
- III. In the **Password** field, enter the initial password provided by your instructor; then press the TAB key to move the cursor to the **Language** field.

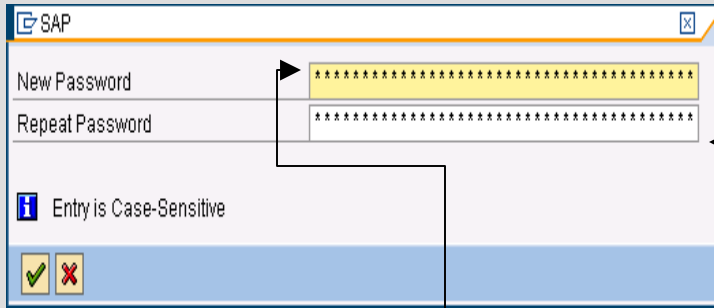
initial

NOTE:

- If you wish to change the data in any field, defaulted or not, simply type over the existing entry.

- IV. Hit the ENTER key on your keyboard or select the Enter  icon located at the top left of the view.

A pop-up window in which you enter a new password displayed.



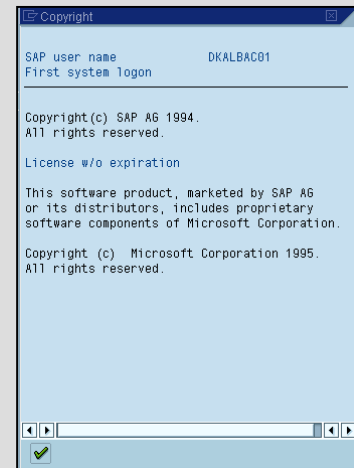
V. Enter your new password in the **New password** field, press the TAB key and re-enter your new password in the **Repeat password** field. As you type the passwords, you will not see them.

VI. Press the ENTER key on your keyboard or select the button located within the pop-up window.

You have just changed your password and a copyright notice similar to the one depicted will display.

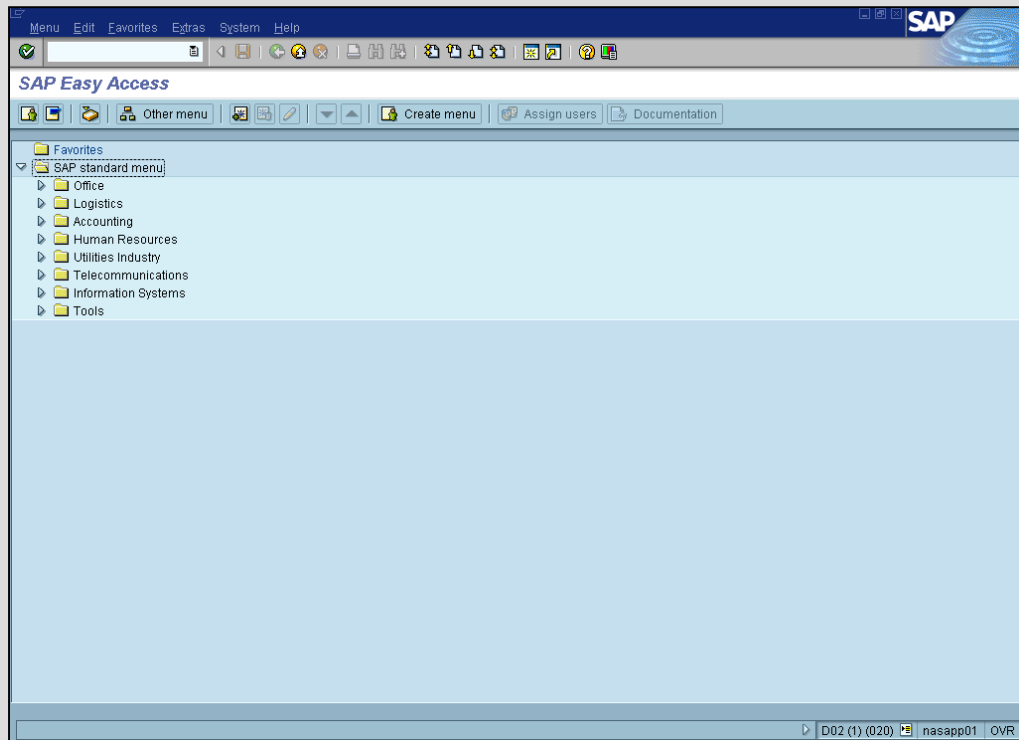
If a pop-up window is displayed instead of the copyright notice, you have either made a mistake in entering your new password or created an invalid password. (If you need help to create a valid password, see "Creating your own Password" on page 5 of this document). The pop-up window contains a message describing the mistake. To remove the pop-up window, press the ENTER key. Repeat steps V and VI above.

You should only see this screen the first time you log on.



- VII. Press the ENTER key on your keyboard or select the Continue button located within the copyright notice box.

SAP Easy Access View

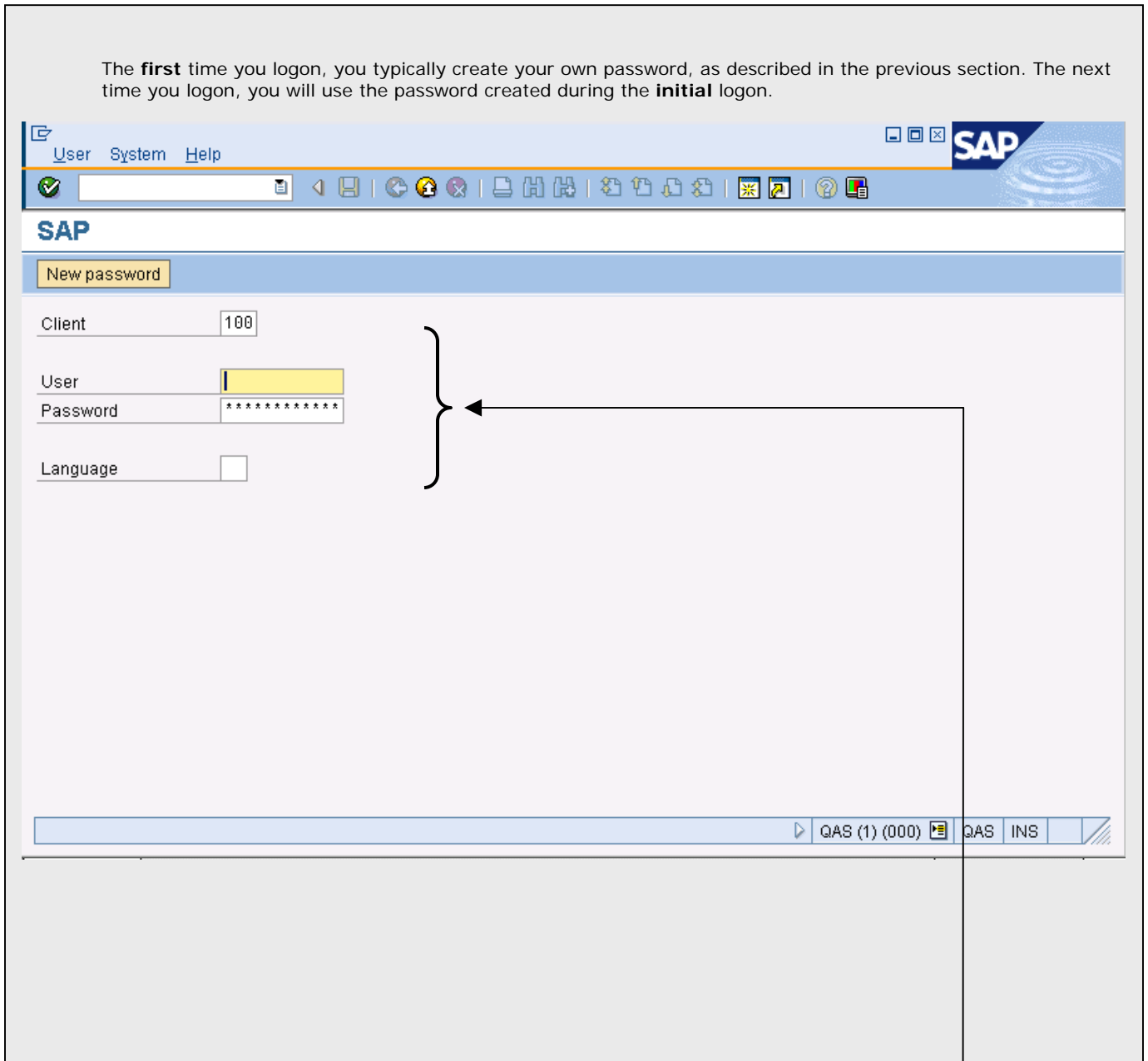


The copyright notice is removed, and you have logged onto the system.

Remember, you may see a slightly different screen depending on how your system is set up.

Subsequent Logons

The **first** time you logon, you typically create your own password, as described in the previous section. The next time you logon, you will use the password created during the **initial** logon.



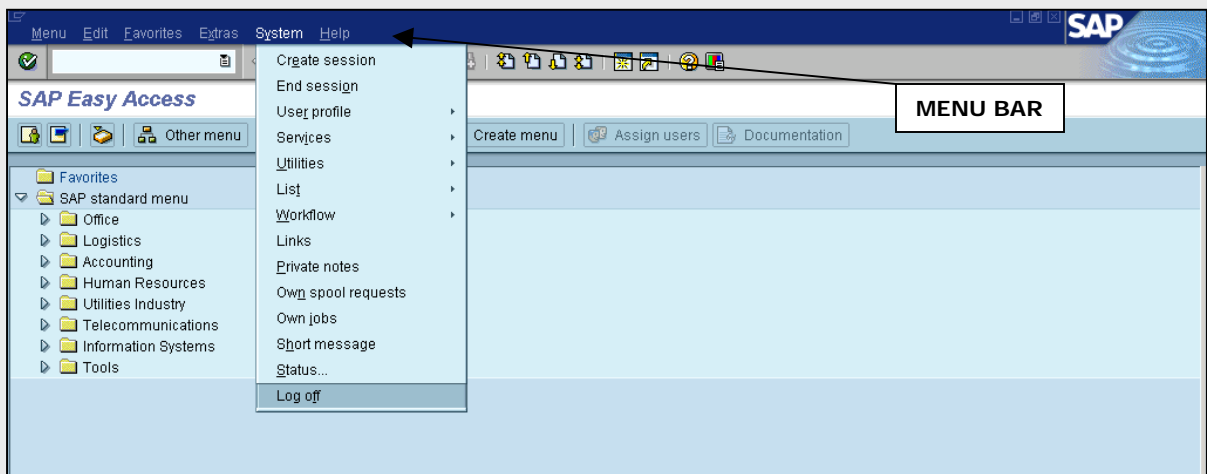
To logon, enter the appropriate data in the **Client**, **User**, **Password**, and **Language** fields and hit the **ENTER** key on your keyboard. You have logged onto the system.

Logging Off

You are able to log off the system from any screen or application.

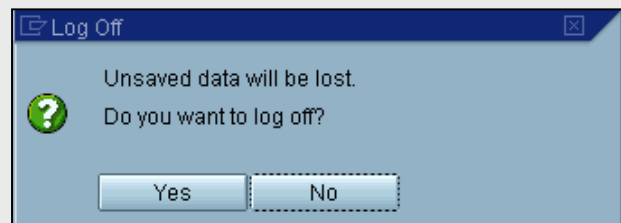
To log off:


1. From the Menu Bar, follow the Menu Path: **System >> Log off** as depicted below.



Exercise: Log off then log on using student # and password

The Log off pop-up window is displayed. You now need to confirm that you want to log off.



2. Select the  button located within the **Log Off** dialog box.

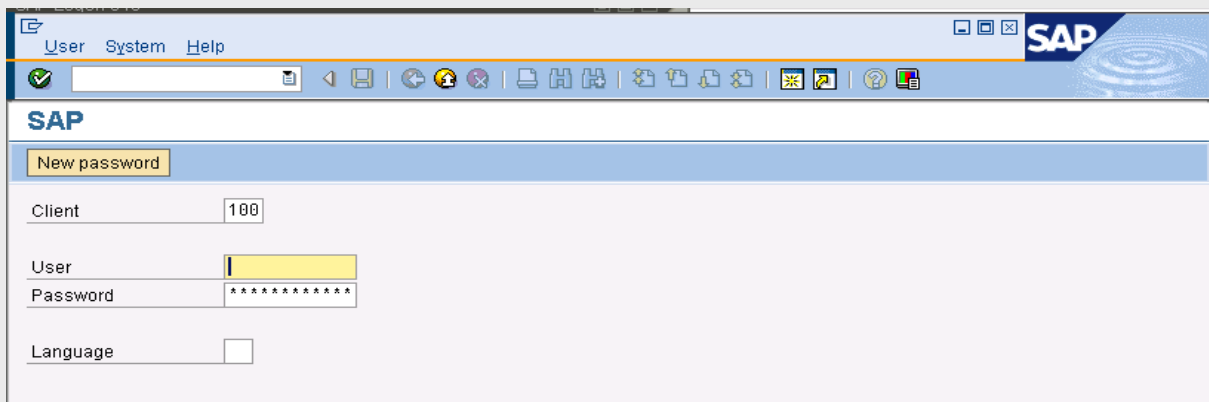
All your system's windows and applications are closed, and you are returned to your windowing environment.

Changing Your Password

You may change your password at any time (only once in one day). For security reasons, however, your system administrator may require that you change your password on a scheduled basis. In this case, you will receive a message from the system that it is time to change your password.

Change Password

You will be changing your password from the logon screen before you logon to the system.



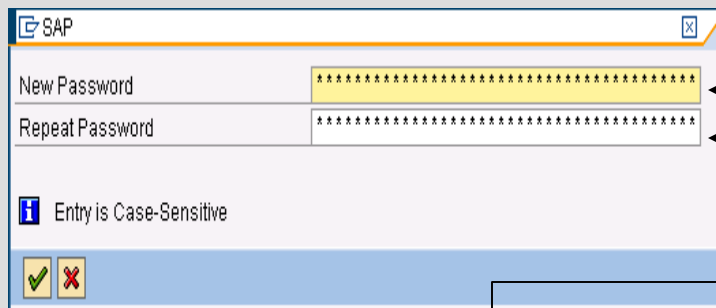
The screenshot shows the SAP logon screen with the 'New password' tab selected. The form contains the following fields:

- Client:** 100
- User:** (empty)
- Password:** (masked with asterisks)
- Language:** (empty)

A 'New password' button is located at the top of the form area.

1. In the **Client** field, enter the client number; then press the TAB key to move the cursor to the **User** field.
2. In the **User** field, enter your user name; then press the TAB key to move the cursor to the **Password** field.
3. In the **Password** field, enter your current password; then press the TAB key to move the cursor to the **Language** field.
4. Click on the **New password** button located near the top of the view (on the Application Toolbar).

A pop-up window in which you enter a new password displayed.



5. Enter your new password in the **New password** field, press the TAB key and re-enter your new password in the **Repeat password** field. As you type the passwords, you will not see them.
6. Press the ENTER key on your keyboard or click once with the left mouse button on the button located inside the pop-up window.

Provided you have not made any mistakes, the SAP Main Screen will display.

Exercise: Change Password

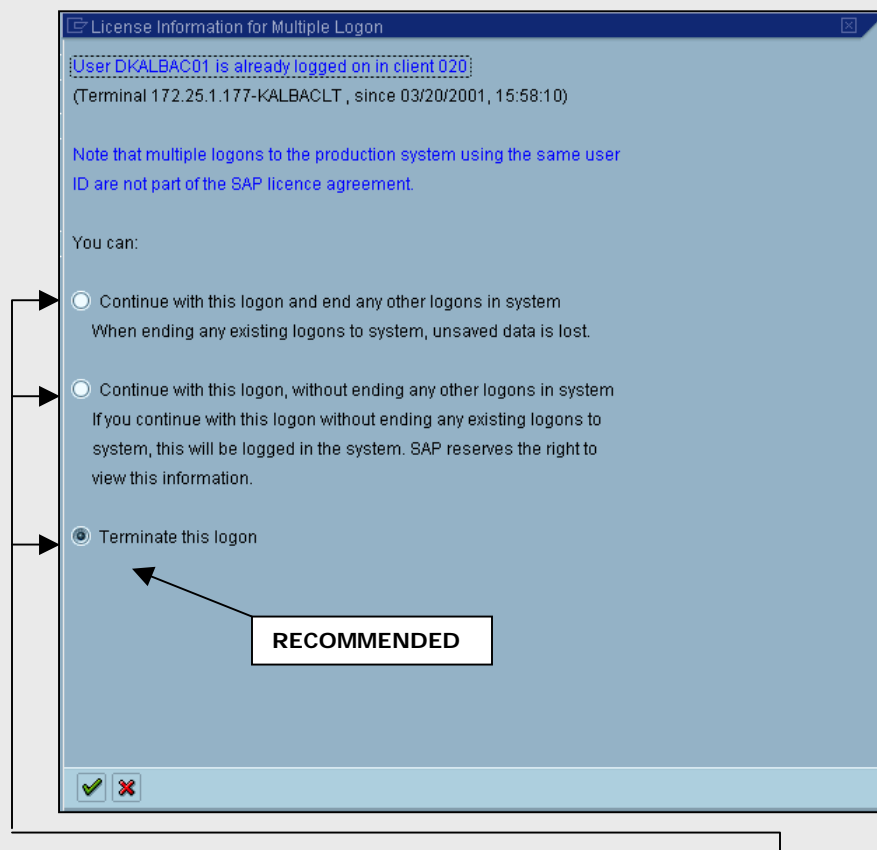
Multiple Logons



NOTE:

- Multiple logon sessions by one individual are always logged in the system beginning with the 4.6 release of SAP. This is for security, as well as for licensing reasons. Should you attempt to logon more than one time, the **License Information for Multiple Logon** dialog box shown below will display.

Multiple Logon Warning Dialog Box



Should you receive the information dialog box shown above, select the radio button corresponding to the action you wish to take by clicking once with the left mouse button on the radio button itself.

Press the ENTER key on your keyboard to carry out the function selected in the previous step.

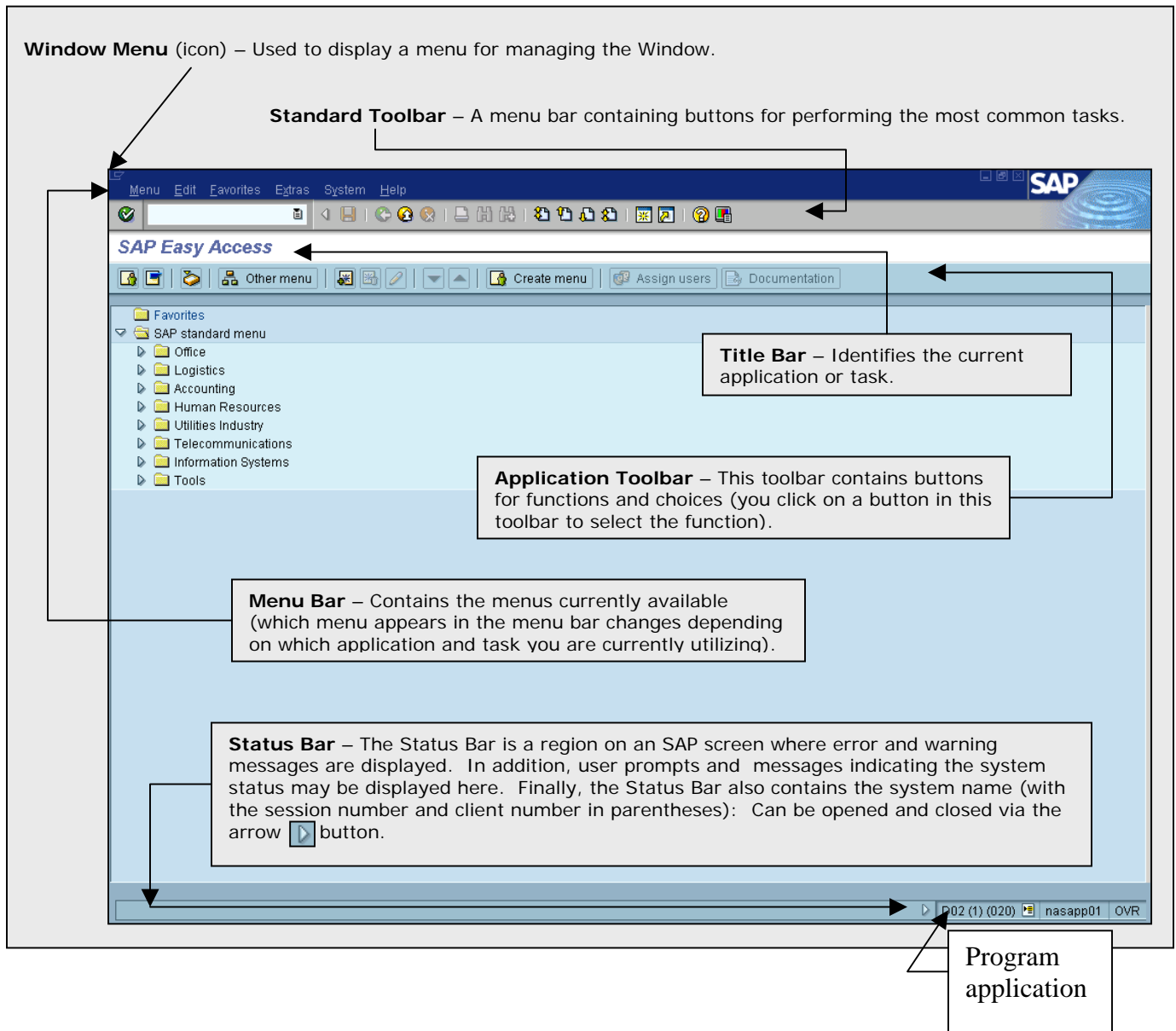
Should you attempt to log on more than one time, for example at a different PC, the message above will appear – recommended option is to terminate this log on

Learning the Basics

This chapter describes how to use the Graphical User Interface (GUI).

Looking at Parts of the Window

Provided below is a brief description of the Window. A more detailed explanation of the elements shown below will be provided in the coming pages.



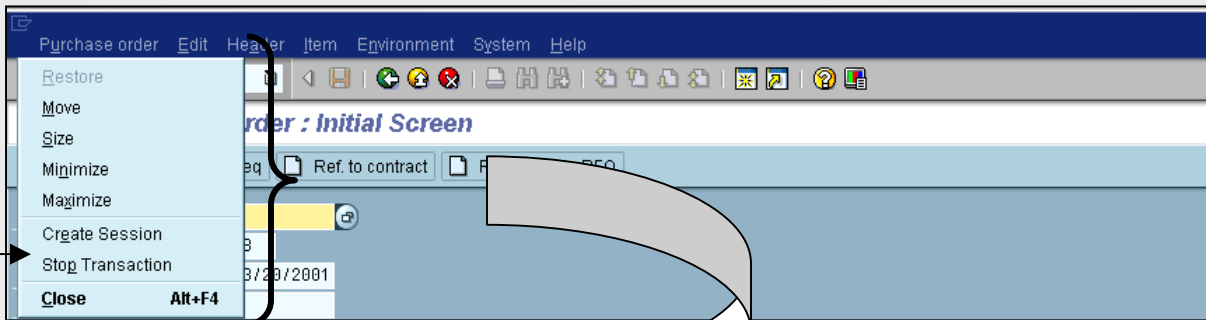
Window Menu (icon)



Menu Bar



By selecting the **Window Menu** icon located in the upper most left hand corner of the view, the menu shown below will display (see representation below).

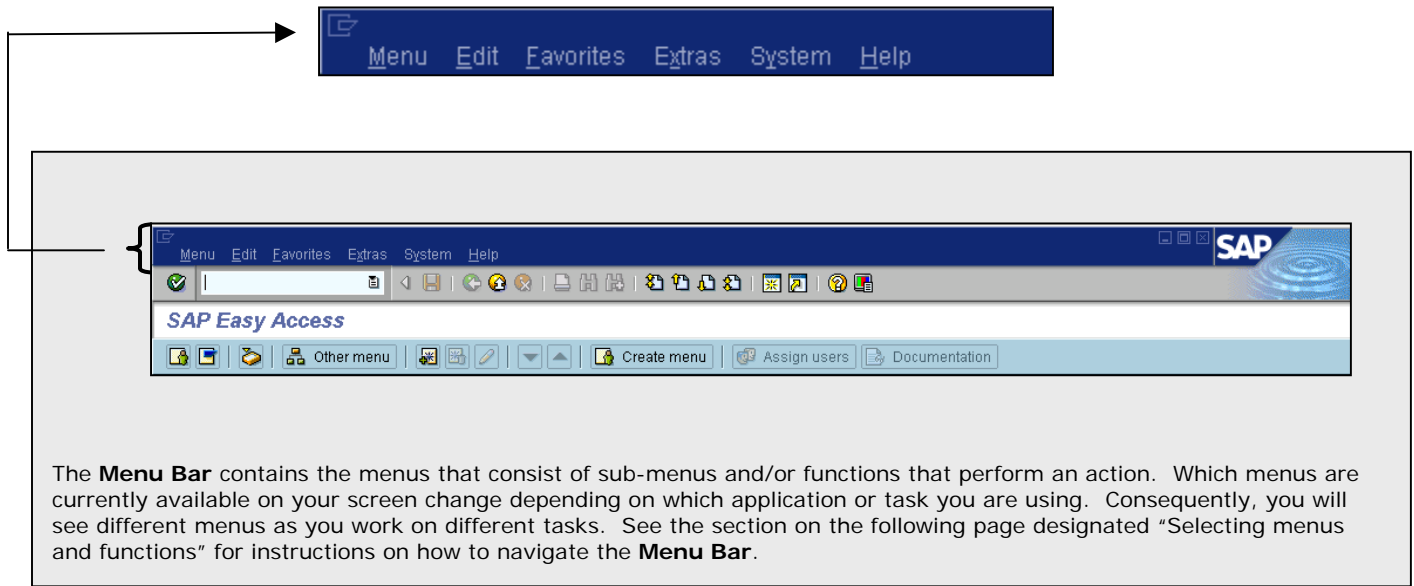


The menu returned is utilized to manage (maximize, minimize, move and so on) the windows of the SAP Environment. Additionally, new sessions may be initiated from this menu.

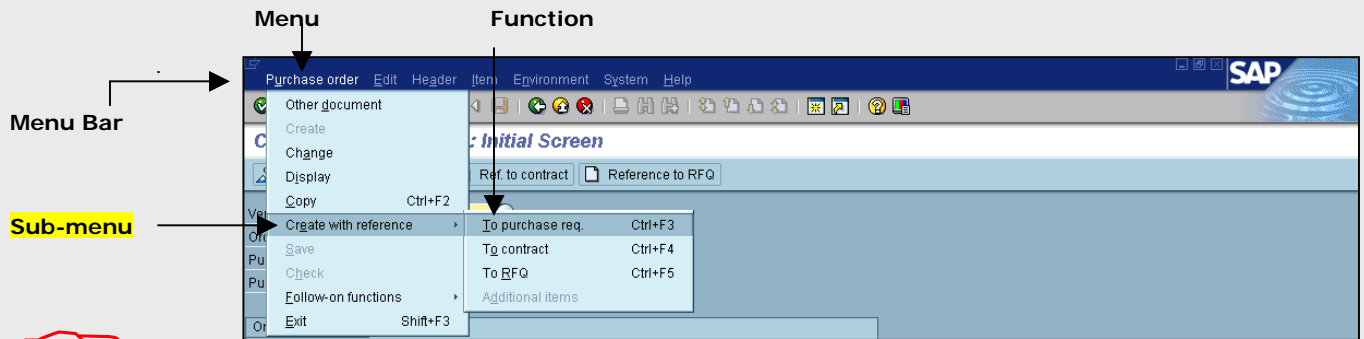
If an option in the Menu is shaded gray, the option is not available. For example, please note that the **Restore** option in the menu above is shaded gray, and thus not available for the current application.

Stop transaction can be very useful should you realize that you have made a mistake/error and need/want to stop the transaction.

Menu Bar



Menus contain sub-menus and functions. In the example below, the menu *Purchase order*, the sub-menu *Create with Reference*, and the function *To purchase req.* are selected.



NOTE:

- Remember, if an option is shaded gray, it is not available for the current application.

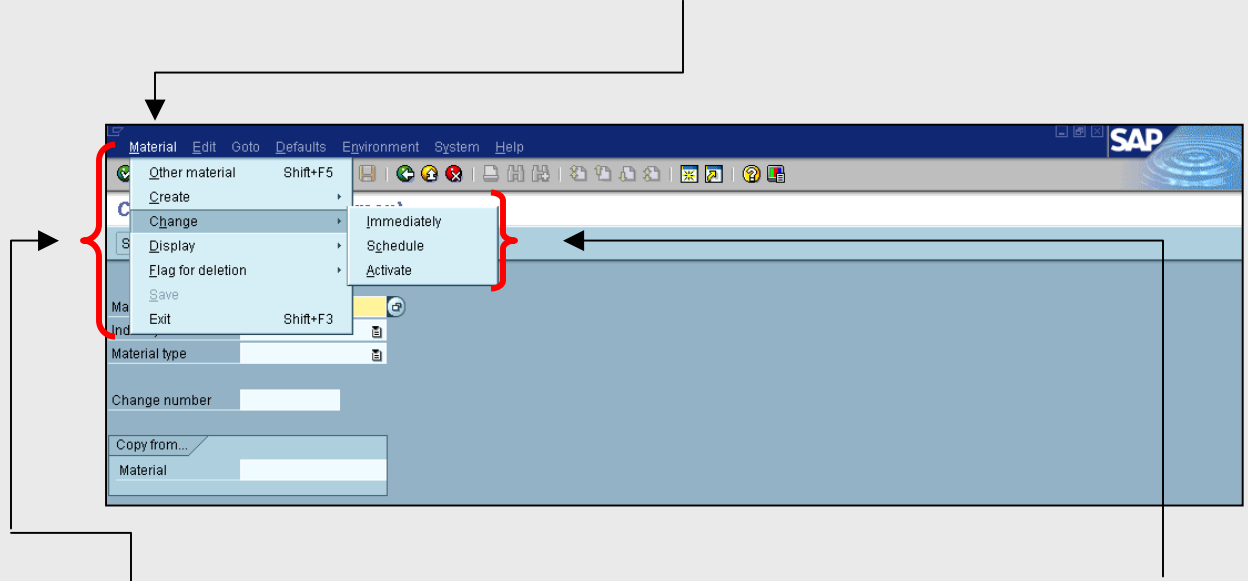
Tip To display all the menus in a Menu Bar, click once with the left mouse button on a menu and drag the cursor across the menus in the Menu Bar.

Hold mouse over first selection of menu bar
 Left Click for drop down
 Slowly slide mouse along menu bar to view other drop downs (sub menus)

Selecting Menus and Functions

You can select menus, sub-menus and functions with either the mouse or the keyboard. Keep in mind that a sub-menu, which is "subordinate" to a menu function, will have an arrow to the right of the item (see below).

The menu chosen in the example below is the **Material** menu.



Entries on the **Material** menu that are Sub-menus (note the arrows, an indication that this is a sub-menu).

Entries on the **Material** menu that are **functions**.

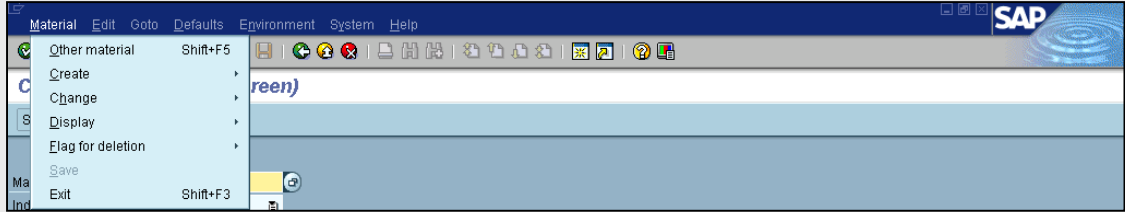


Using the Mouse

You select menus, sub-menus, and functions by clicking on them.

To select a menu:

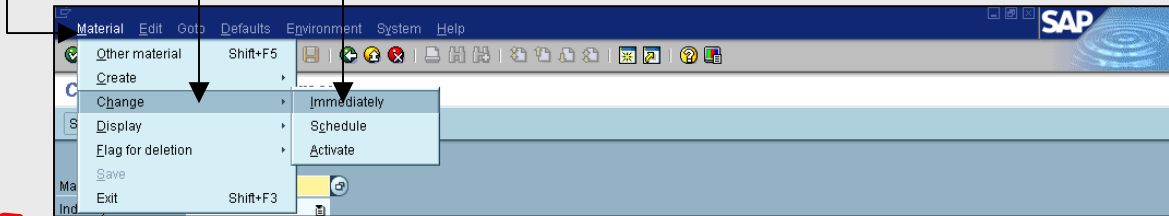
- With the left mouse button, click on the menu name you wish to select. In the example below, the **Material** menu was selected to arrive at the drop down menu shown.



As mentioned previously, menus contain sub-menus and functions. To select some functions, it may be necessary to first choose one or even two sub-menus first. All sub-menus have an arrow located to the right.

To select a function from a menu or a sub-menu:

- Click on the Menu name with the left mouse button.
- Click on a sub-menu (indicated by an arrow located on the right) if one exists with the left mouse button.
- Click on a function with the left mouse button and the function you select is performed.



NOTE:

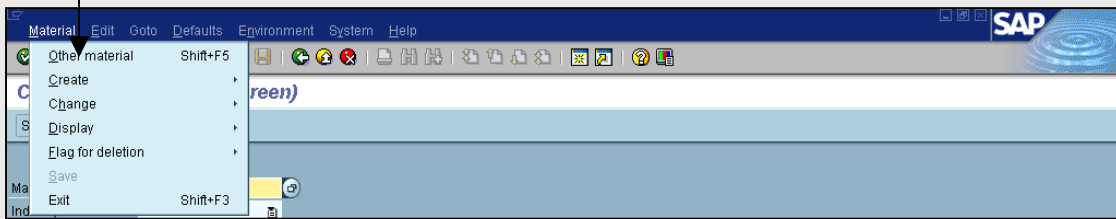
- You can easily cancel, or close, any menu or sub-menus that you have selected by clicking once with the left mouse button outside of the menu or sub-menu.

Using the Keyboard

You select a menu by pressing **F10** and then using the arrow keys to mark and display the menu. You select a sub-menu and/or functions by marking them with the arrow keys and then pressing the ENTER key.

To select a menu:

1. Press the **F10** key and the Menu Bar is activated.



Every screen will have System & Help



NOTE:

- To cancel a selection, simply hit the **F10** key.

F10 Toggles on & off

2. Use the ← or → key to move to the previous or next menu, respectively. Each time you press the arrow key, the previous or next menu is marked.
3. Use the ↓ arrow key to move to the sub-menus or functions located in the menu. Each time you press this arrow key, a sub-menu (indicated by an arrow at the right) or a function will be marked.
4. Upon arriving at the requisite sub-menu, use the → arrow to move to the next sub-menu or function. This action will mark the sub-menu and bring forward other sub-menus or functions.
5. Use the ↑ and ↓ arrows to move to functions. Instead of a function, you may select another sub-menu if one is available.
6. Press the ENTER key on your keyboard upon arriving at the requisite function.

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The table below shows the menus that are always available from every screen in the system

Menu	Description
<i>System</i>	The <i>System</i> menu contains functions that affect the system as a whole, such as <i>Create session</i> , <i>User profile</i> and <i>Log off</i> .
<i>Help</i>	The <i>Help</i> menu contains functions for accessing the various forms of online help that are available in the system.

The Table below shows the menus that are standard in **most** Applications.

Menu	Description
< <i>Object</i> >	The first menu in the menu bar is usually named after the object you are currently working with. This menu contains functions, an entry on a menu that represents an action that the system performs, that affect the object as a whole.
<i>Edit</i>	The second menu in the menu bar is the <i>Edit</i> menu. The <i>Edit</i> menu contains actions you can use to edit components of the current object, for example <i>Select</i> , <i>Edit</i> , or <i>Copy</i> . This menu also contains the <i>Cancel</i> function, which allows you to leave a task without the system checking and saving the data you have entered.
<i>Goto</i>	The third menu in the menu bar is the <i>Goto</i> menu. It contains functions that allow you to move directly to other screens of the task you are currently working in. It also contains the <i>Back</i> function, which allows you to go back one level in the system hierarchy. Before going back, the system checks the data you have entered on the current screen and displays a dialog box if there is a problem.

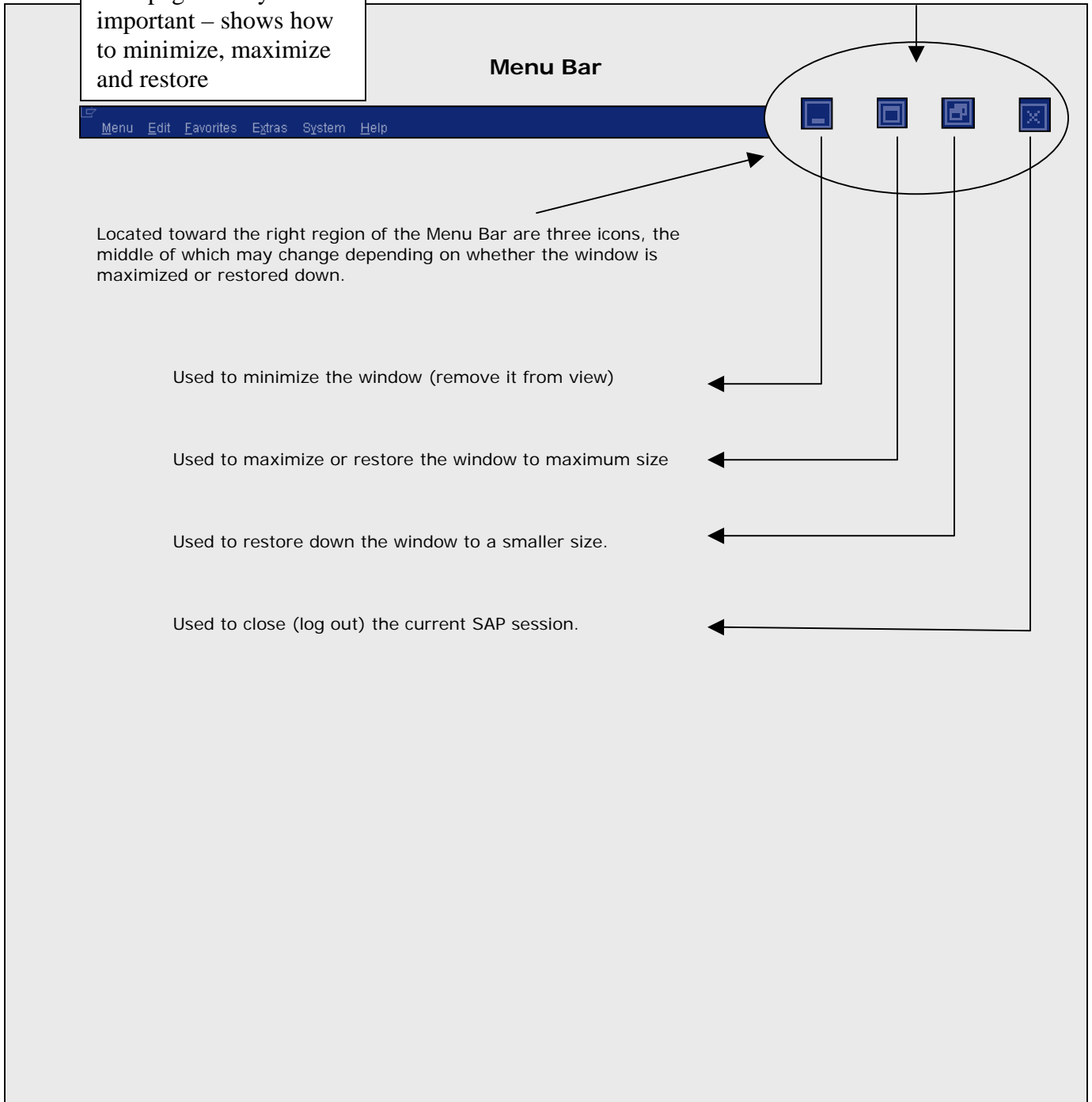
mySAP ERP 2005 Basic Navigation Training

The table below shows other menus that may also be displayed in various applications.

Menu	Description
<i>Extras</i>	The <i>Extras</i> menu contains functions you can choose to complete the current object or an object component. These are usually functions you do not constantly need.
<i>Environment</i>	The <i>Environment</i> menu contains functions you can choose to display additional information about the current object.
<i>View</i>	The <i>View</i> menu contains functions you can choose to display the current object in different views. For example, switching between a one-line and two-line display of a table.
<i>Settings</i>	The <i>Settings</i> menu contains functions you can choose to set user-specific transaction parameters.
<i>Utilities</i>	The <i>Utilities</i> menu contains functions you can choose to perform object-independent processing. For example, general delete, copy, and print functions.

Additional Functionality on Located on the Menu Bar


This page is very important – shows how to minimize, maximize and restore



Standard Toolbar


The **Standard Toolbar** is of particular interest, since it contains many buttons for performing common actions such as Enter, Save, Exit, Print, Page forward, etc. Also located in the Standard Toolbar is the **Command Field** (see below), which is used for transaction codes, a topic yet to be discussed. The buttons located in the Standard Toolbar remain the same in all applications. However, in some applications, the buttons may not be available for use. They will be shaded out. By positioning the cursor on the buttons in the Standard Toolbar and leaving it there, a small banner will appear with the name of the button. Some of the banners will also provide the corresponding function key(s) used to perform that function.

Standard Toolbar









Allows you to open & close command bar







Command Field

If the Command Field is not present on your Standard Toolbar, you need to click once with the left mouse button on the small arrow  in order to bring the Command Field into view.

Command Field - The Command Field is used for entering commands, such as Transaction Codes. Via transaction codes, the user is able to go to applications directly.

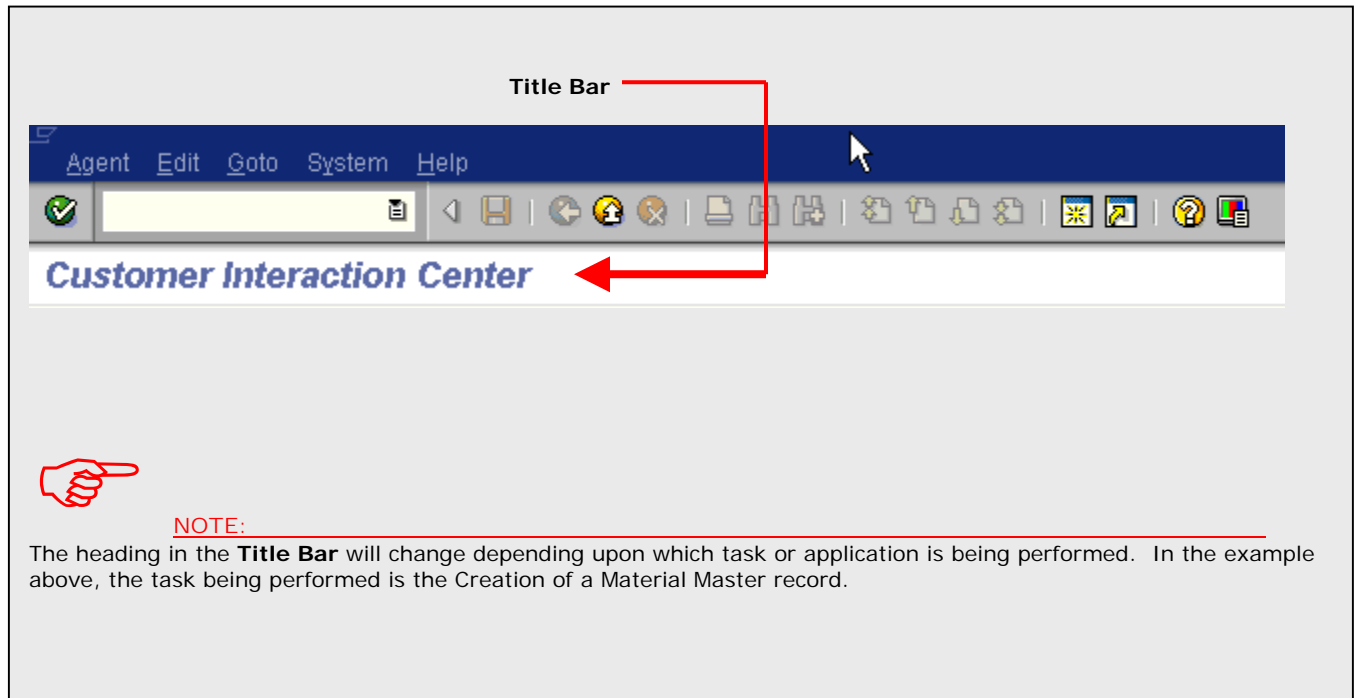
	Save Button – Click this button to save your work (performs same function as <i>Save</i> in the <i>Edit</i> menu).
	Green arrow
	Back Button - Click on this button to return to the previous screen without saving your data.
	Yellow exit button
	Exit Button Click on this button to leave the current application. The system returns to the previous application or to the main menu screen.
	Print Print a document or report

Standard Toolbar continued...

	Red cancel button	
	Cancel Button	Click on this button to exit the current task without saving your data.
	First Page / Previous Page / Next Page / Last Page Buttons	Keys used to go to the First, Previous, Next and Last page or screen.
	Yellow star	
	Create Session Button -	This button creates a new session.
	Generate Shortcut Button	Used to create a shortcut to this transaction on your desktop.
	Help Button	Click on this button to display help for a field.
	Will discuss in more detail later	
	Customizing Button	Via this button, you can change the appearance of certain elements of the Window: For example, font size, list colors, sounds, cursor placement may all be manipulated.

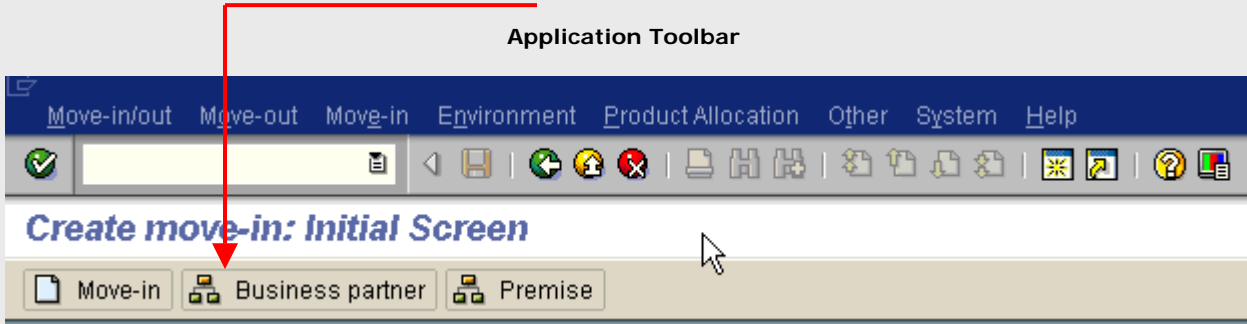
Title Bar

The **Title Bar** contains the name of your current application or task.



Application Toolbar

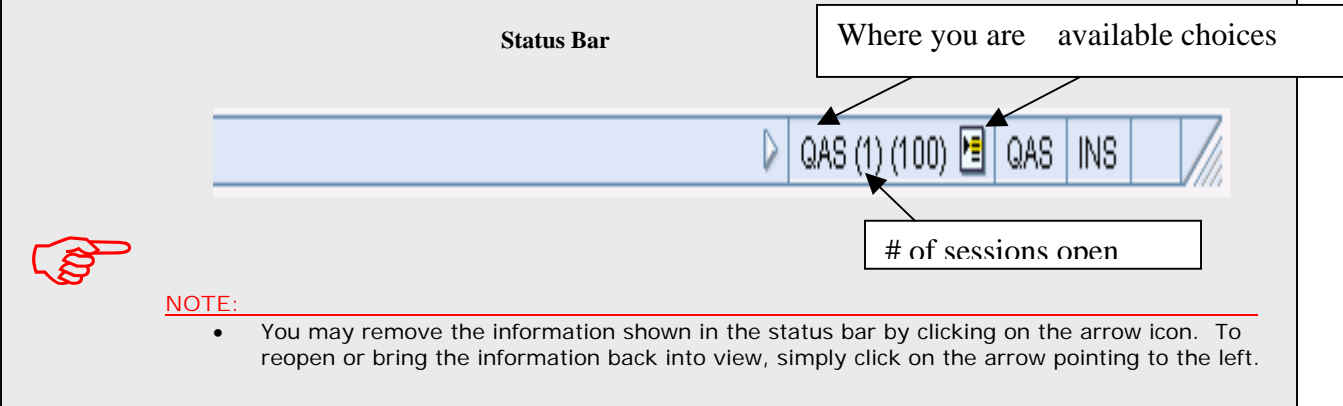
The Application Toolbar provides the user with buttons (functions) that are available in the current application. There are a profuse number of application toolbar buttons, too many to be explained. Once you start performing your daily tasks, you will become familiar with the buttons you need to utilize. To use the application toolbar, you click on the button located in the toolbar to perform that function.



The application Toolbar will always be positioned just below the Title Bar

Status Bar is very important because it shows you where you are

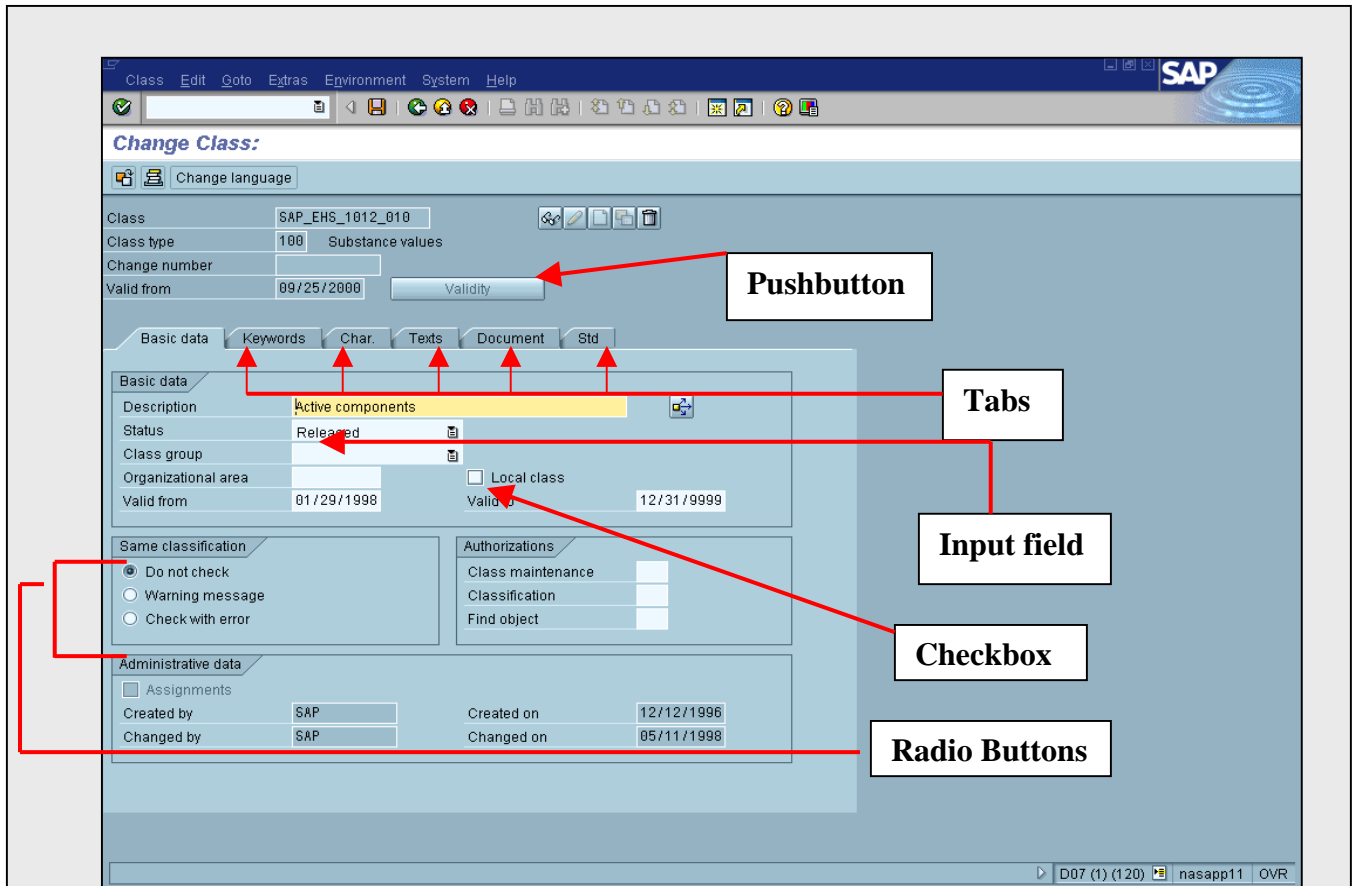
The system displays warning and error messages in the status bar. The Status bar also contains the system name (with the session number and client number in parentheses), the open or close status bar arrows, and the system time.



NOTE:

- You may remove the information shown in the status bar by clicking on the arrow icon. To reopen or bring the information back into view, simply click on the arrow pointing to the left.

Additional Screen Elements



Pushbuttons Graphical control element that you click once with the left mouse button to execute the function linked to them. Pushbuttons can contain text or graphic symbols.

Tabs Graphical representation of additional information screens available in an application.

Input field Field on a screen where data may be entered.

Checkbox – Ability to select one, many or all

Checkbox Graphical control element that allows the user to choose any number of elements from a list of fields.

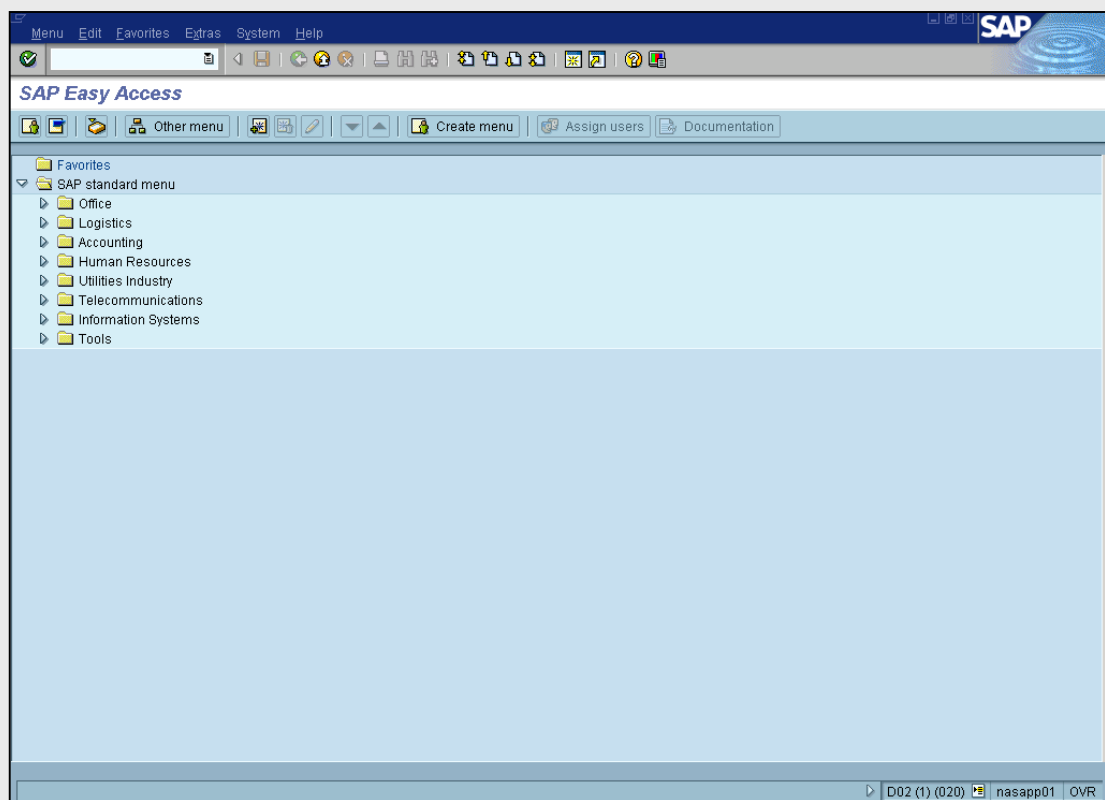
Radio buttons Graphical control element that allows the user to choose just one element from a field of lists.

Allows you to select one item in group

Moving around the system

SAP Easy Access Screen

The **SAP Easy Access** screen shown below is the standard entry screen displayed after logging onto the system.



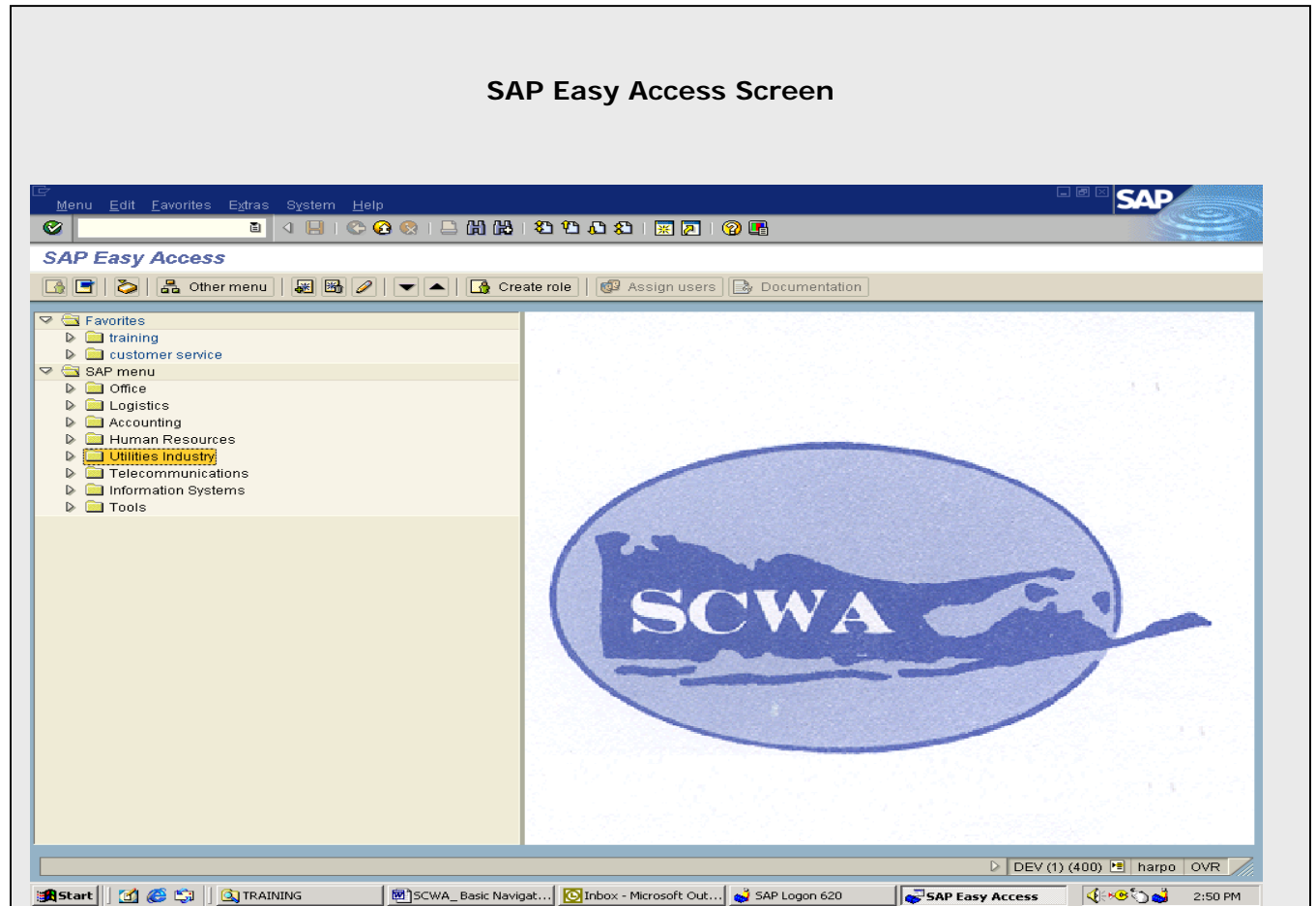
After logging on to the system, you need to **choose the application** (software program or set of software programs that perform a specific job; for example, Accounts Receivable and General Ledger). Next, the **task** (one or more screens that, when completed, perform an action such as entering an invoice or displaying data) that you want to work on must be performed. Finally, you must **choose a function** (an entry on a menu or toolbar that represents an action to start the task, such as Save). As you are working, you may decide you want to start a different task, at which point you will need to choose the new application and function.

Using the Tree Structure


To initiate the requisite task to be performed, you must drill down into the tree structure of the **SAP Easy Access** screen to access the transaction. Follow the sample task below to see how this is accomplished.

Task: Assume the role of an accounts receivable accountant and **display** a Customer master record using the SAP standard menu.

Negotiating the Tree Structure

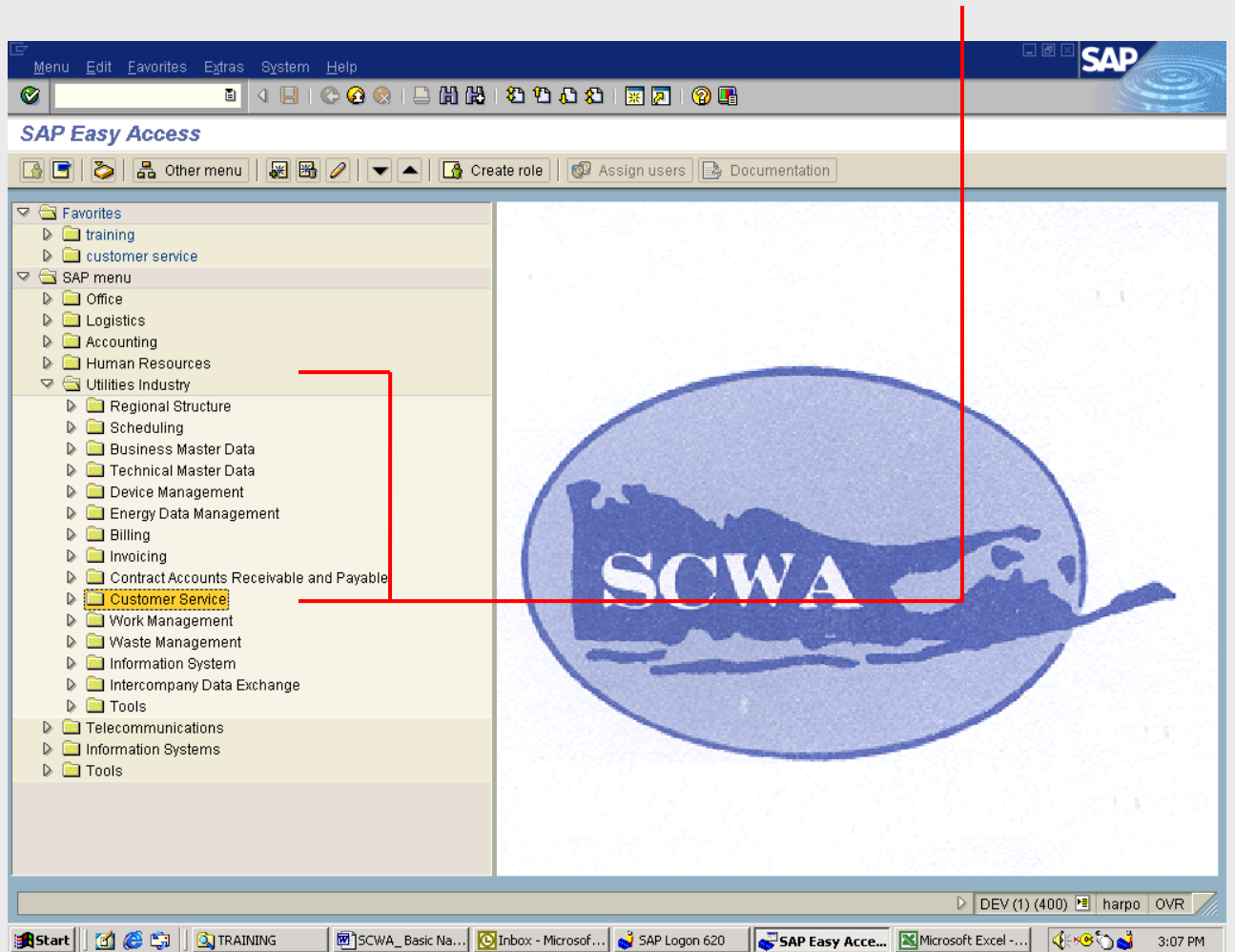


*The Menu Path to be followed: **Utilities Industry** > Customer Service > Front Office/Customer Service > (CIC0) Customer Interaction Center > Display.*

1. Position the cursor on the right pointing arrow  corresponding to *Accounting* and click once with the left mouse button.


Exercise: Set system to show transaction codes
Extras, settings, (4 boxes) display favorites, display technical names

Result: The Tree structure shown on the previous page “opens up” rendering another list of options, all under the *Utilites Industry* heading, as is depicted below.



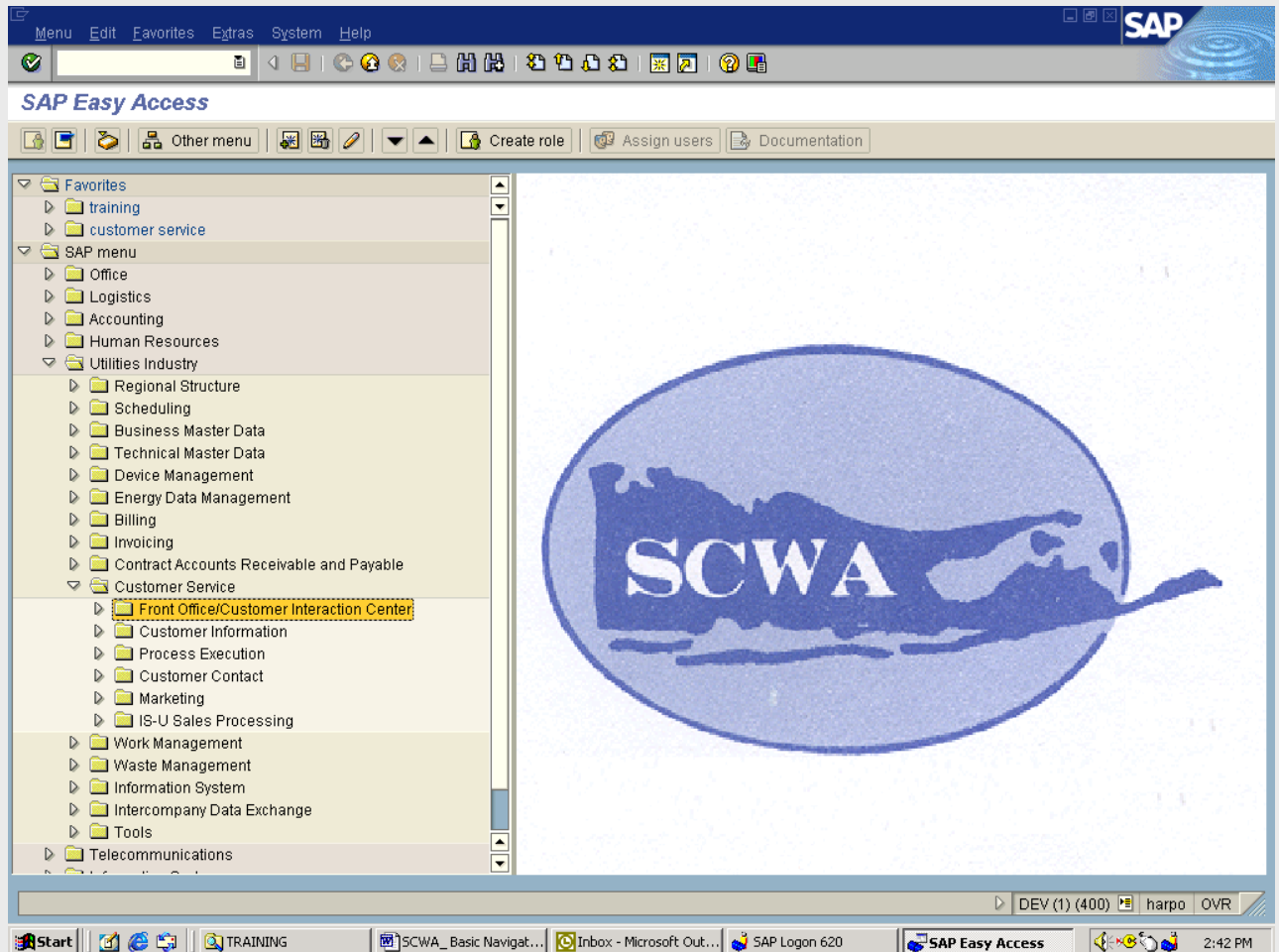
NOTE:

Please note that the arrow you clicked on, corresponding to Utilities Industry, is now pointing down.  This indicates that this file is open and that the contents of the file are made available.


 *Utilities Industry* > ***Customer Service*** > *Front Office/Customer Service* > *(CIC0) Customer Interaction Center* > *Display*.

2. Position the cursor on the right pointing arrow  corresponding to *Customer Service* and click once with the left mouse button.

Result: The Tree structure shown on the previous page “opens up” rendering another list of options, all under the *Customer Service* heading, as is depicted below.

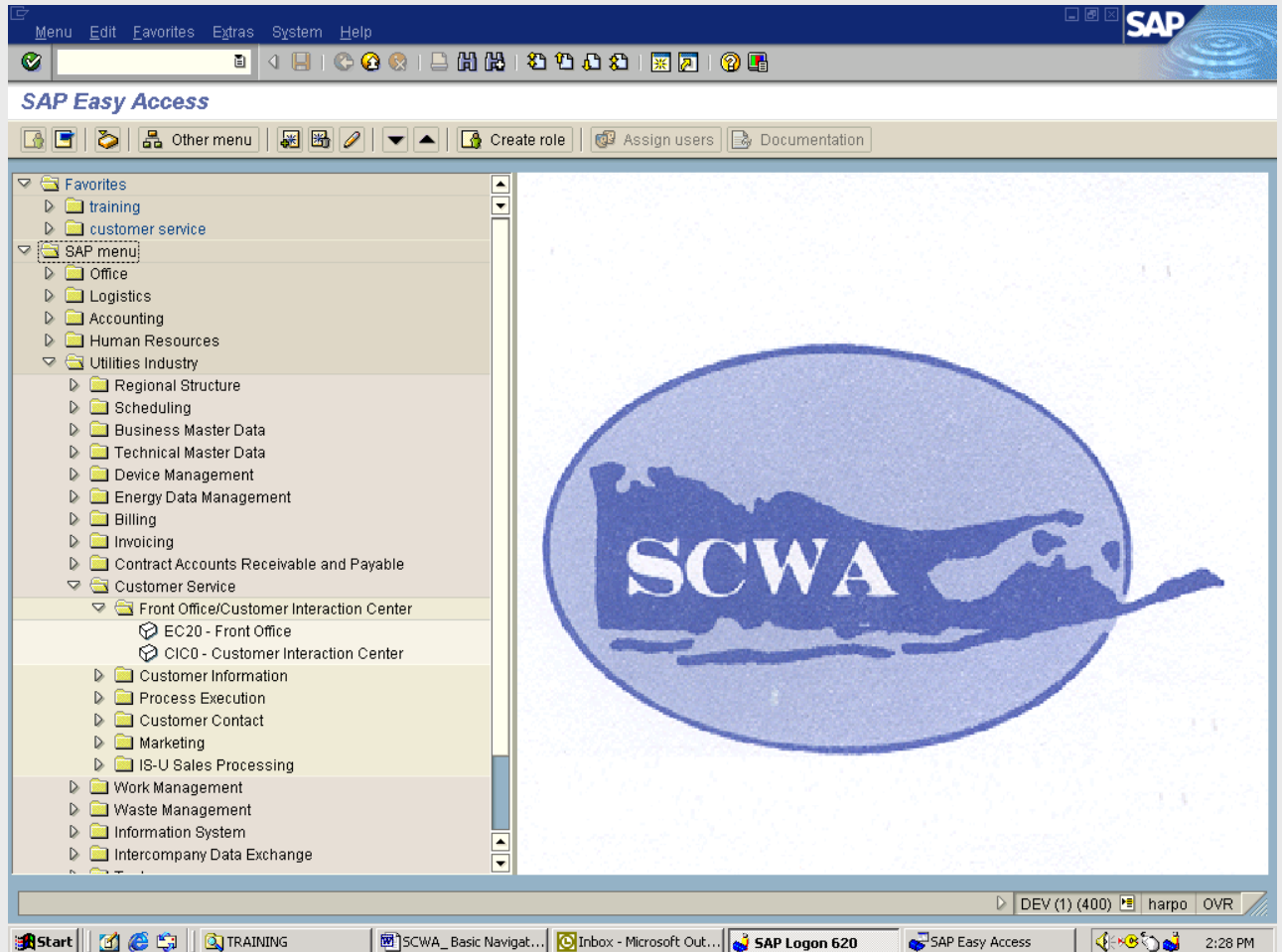


🔗 *Utilities Industry > Customer Service > Front Office/ Customer Interaction Center*

3. Complete the Menu Path by clicking on the arrows  corresponding to Customer Service and Front Office/ Customer Interaction Center.

Once complete, the view should look similar to the one shown on the following page.

Result: You will have arrived at a view similar to the one shown below.



The task, which in this example is CIC0 Customer Interaction Center, is provided for selection. Tasks are indicated by the box symbol.



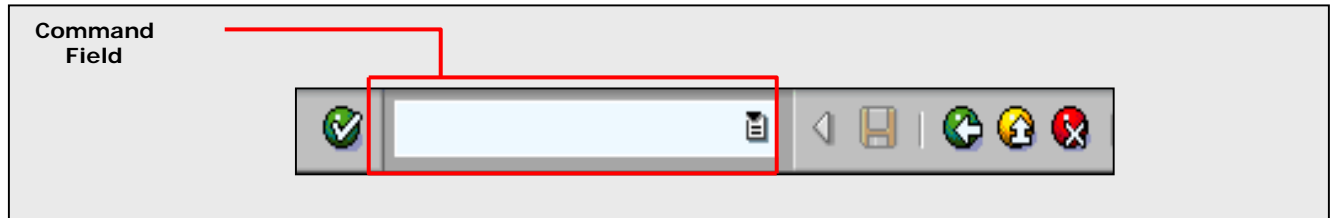
4. Position the cursor on the task and double-click with the left mouse button.

You will arrive at the screen of the task selected.

Entering Transaction Codes in the Command Field

When utilizing transaction codes to access tasks, it is beneficial for the user to be acquainted with the following set of guidelines.

For Review: Transaction codes are entered into the **Command Field**, which is located on the **Standard Toolbar**.

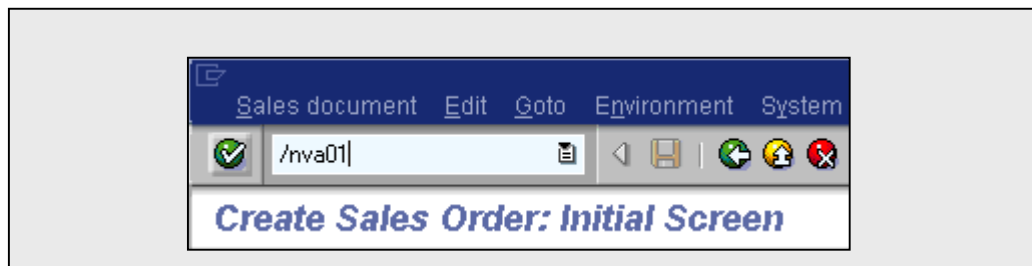


Exercise: Enter CIC0 - green arrow back

Steps for Entering a Transaction Code:

To enter a transaction code and start a task, follow these steps:

1. Place the cursor in the command field. This may be accomplished by clicking once with the left mouse button in the command field or by pressing CTRL + TAB.
2. Enter /n (to end the current task) followed by the transaction code. For example, to enter the transaction for creating a Sales Order, VA01, you would enter /nVA01 in the command field, as shown here.



NOTE:

- If you have just logged onto the system and are currently not working within a task, it is not necessary to enter /n in front of the transaction code.

3. Press the ENTER key and your current task is closed and the initial screen of the new task is displayed.

Creating a New Session and a Task at Once

If you do not want to end your current task, but need to perform another task, you can create a new session (an additional window that can open when you want to work on more than one task at a time).

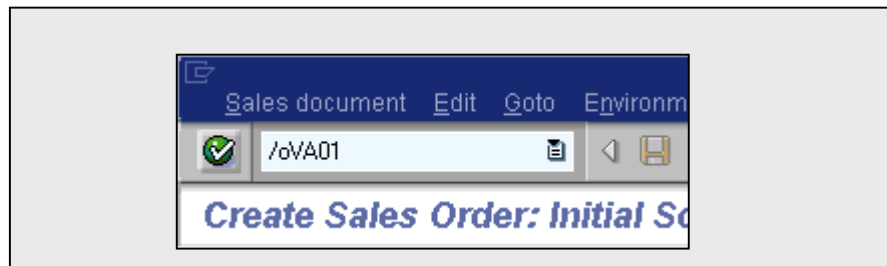
For example, suppose you are creating a Sales order and you need to look at a table of exchange rates. You can start a new session to look for the exchange rate table without having to end your first task of creating the Sales order.

In the system, you can create a session and start a task in one step by using a transaction code. When you open a session with a transaction code, the system displays the initial screen of the task in the new session. To use this method, you must know which transaction code to use for the task you want to perform.

Steps for Creating a Session and a Task at Once

To create a new session and a task at once from anywhere in the system, proceed as follows:

1. Place the cursor in the command field. This may be accomplished by clicking once with the left mouse button in the command field or by pressing CTRL + TAB.
2. Enter **/o** (front slash and the letter "o") followed by the transaction code for the task you wish to start. For example, to create a Sales order, you use the transaction code **VA01**. To open a session and start this task at the same time, you would enter **/oVA01** in the command field, as shown here.



The system opens an additional window for the new session and displays the initial screen of the transaction entered. The system places the new window in front of all the other windows on your computer screen. The new session becomes the active session and remains as such until you move to a different session. You may move between sessions by holding the ALT key down and then pressing on the TAB key.



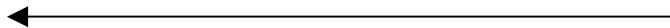
NOTE:

- Depending on the release, there will be a maximum limit in terms of the number of sessions permissible.
- You can identify which session you are currently in by looking at the status bar. The session number will be in parentheses.

Creating a New Session Through Icon

If you do not want to end your current task, but need to perform another task, you can create a new session by using an Icon at the top of the screen. (an additional window that can open when you want to work on more than one task at a time).

Top of the screen: -



Click this Icon To Open a New session

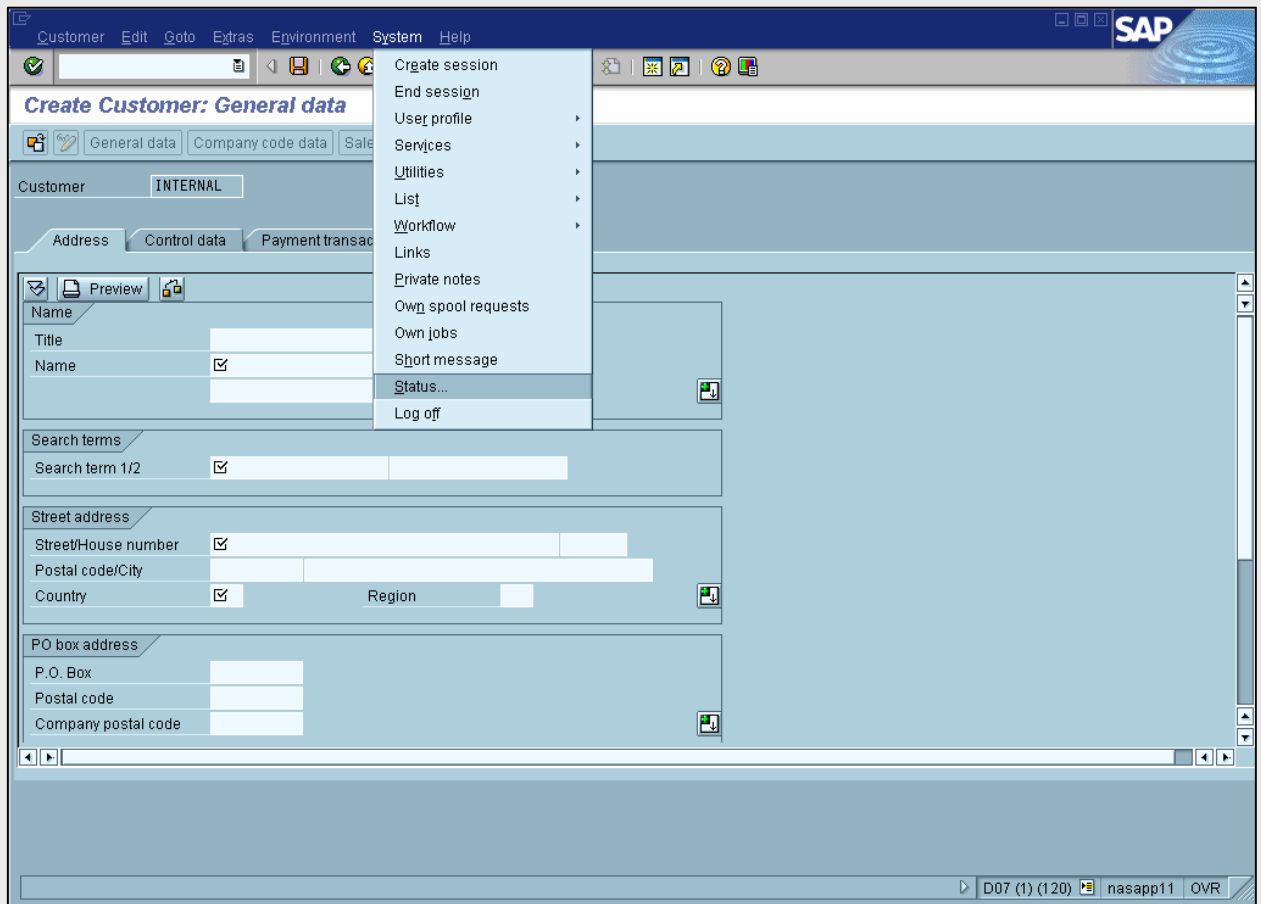


Finding the Transaction Code for the Current Task

You can easily find the transaction code for the task you are currently working in.

To determine the transaction code of the current task:

- From the Menu Bar, select *System > Status*



The **System: Status** dialog box shown on the following page will display.

Creating Favorites

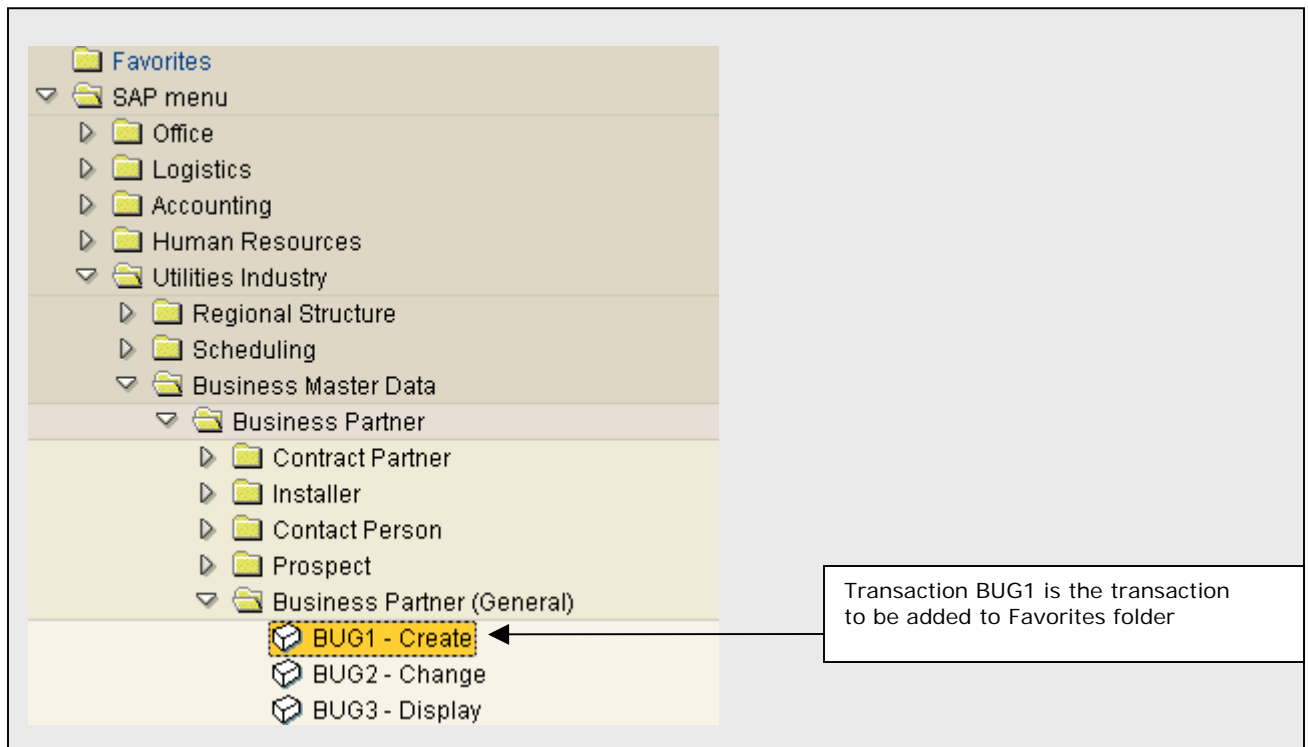
The system provides a **Favorites** folder in which transactions (tasks) that are used routinely may be stored. Consequently, instead of drilling down into the tree structure or entering a transaction code in the command field to access a transaction, the user simply double-clicks with the left mouse button on the transaction(s) stored in the **Favorites** folder.

There are two methods by which a transaction may be added to the Favorites folder. The first method is by the use of the Menu Bar and the second method employs clicking and dragging.

Creating Favorites Way of the Menu Bar

To add commonly used transactions to your Favorites folder by way of the Menu Bar:

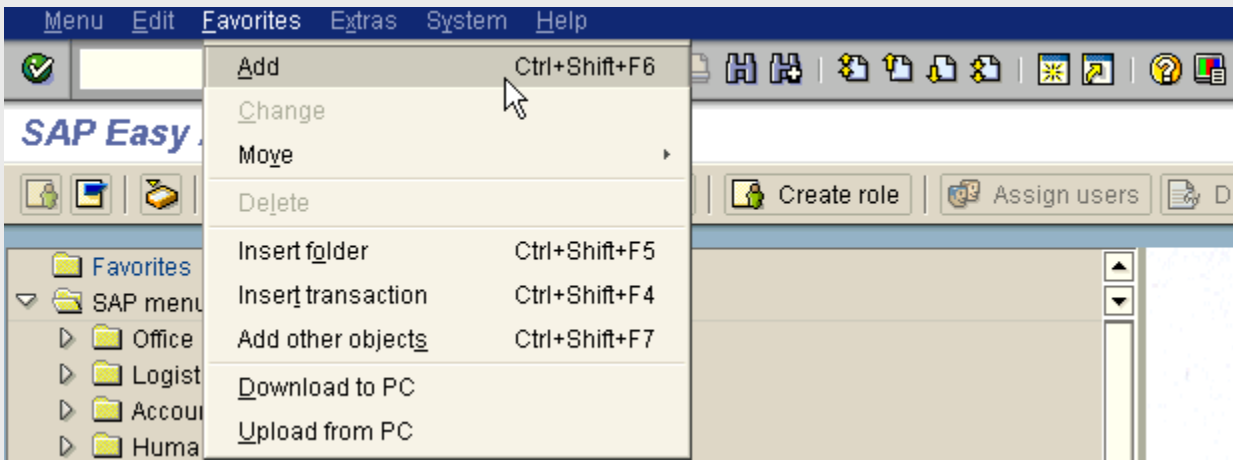
1. Drill down into the compact tree structure as described on page to arrive at the requisite transaction (see example below).



2. Position the cursor on the transaction name and click once with the left mouse button. This action will highlight the entry.

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3. From the Menu Bar, select *Favorites > Add* as shown below.



The screenshot shows the SAP Easy Access interface. The menu bar at the top includes 'Menu', 'Edit', 'Favorites', 'Extras', 'System', and 'Help'. The 'Favorites' menu is open, displaying options: 'Add' (Ctrl+Shift+F6), 'Change', 'Move', 'Delete', 'Insert folder' (Ctrl+Shift+F5), 'Insert transaction' (Ctrl+Shift+F4), 'Add other objects' (Ctrl+Shift+F7), 'Download to PC', and 'Upload from PC'. A mouse cursor is pointing at the 'Add' option. Below the menu, a toolbar contains 'Create role' and 'Assign users' buttons. A folder tree on the left shows 'Favorites' expanded, with subfolders for 'SAP menu', 'Office', 'Logist', 'Accou', and 'Huma'. A text box at the bottom of the screenshot contains the following instructions:

- The Transaction will now be positioned in your Favorites folder.
- From this point on, the transaction will remain in the Favorites folder and be at your disposal.



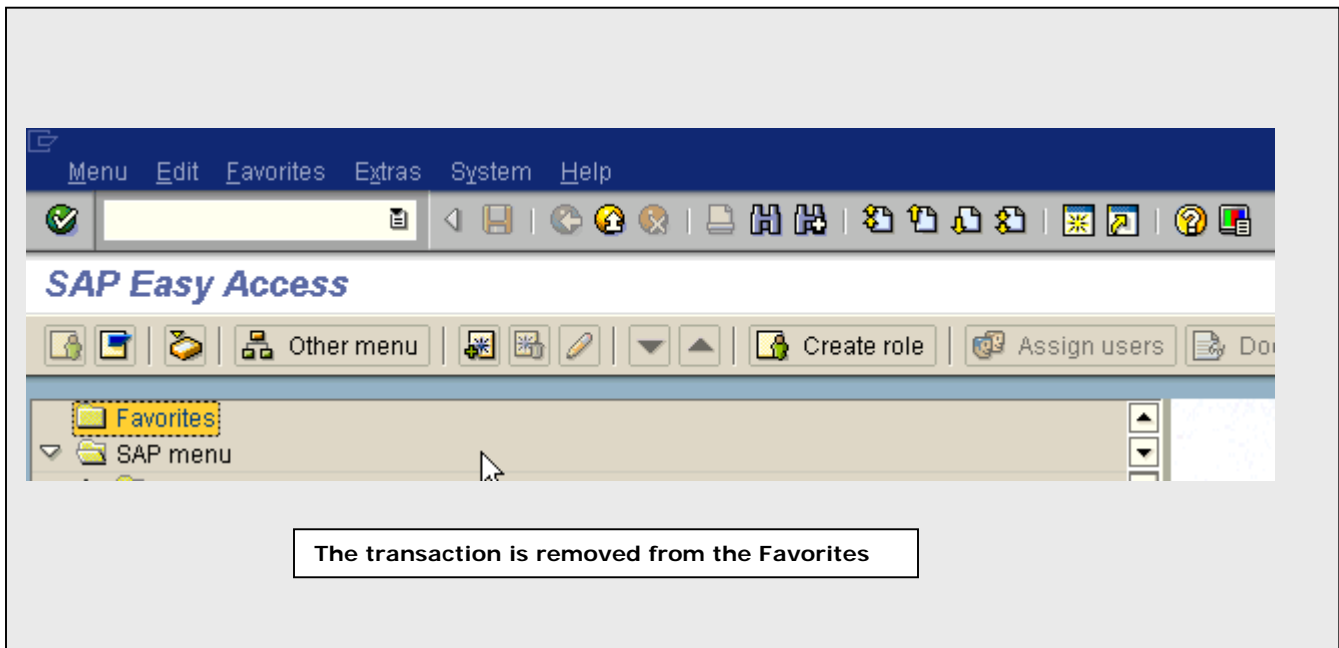
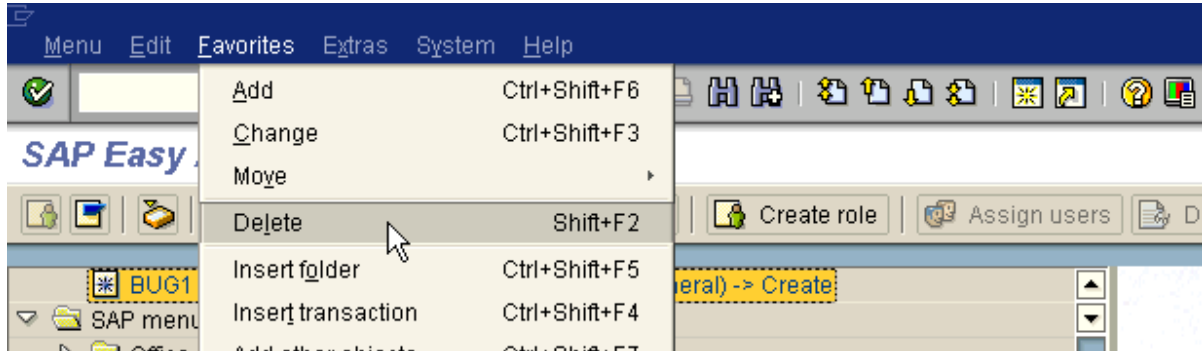
The screenshot shows the SAP Easy Access interface after the transaction has been added. The menu bar and toolbar are visible. The 'Favorites' folder is expanded, and the transaction 'BUG1 - Business Partner -> Business Partner (General) -> Create' is listed within it. A text box at the bottom of the screenshot contains the following instruction:

Now the required transaction is positioned in your Favorites folder.

Removing a Transaction from the Favorites Folder

To remove a transaction from the Favorites folder:

1. Position the cursor on the transaction name and click once with the left mouse button. This action will highlight the entry.
2. Using the Menu Bar, follow the Menu Path: *Favorites > Delete* as shown below.



Set Start Transaction

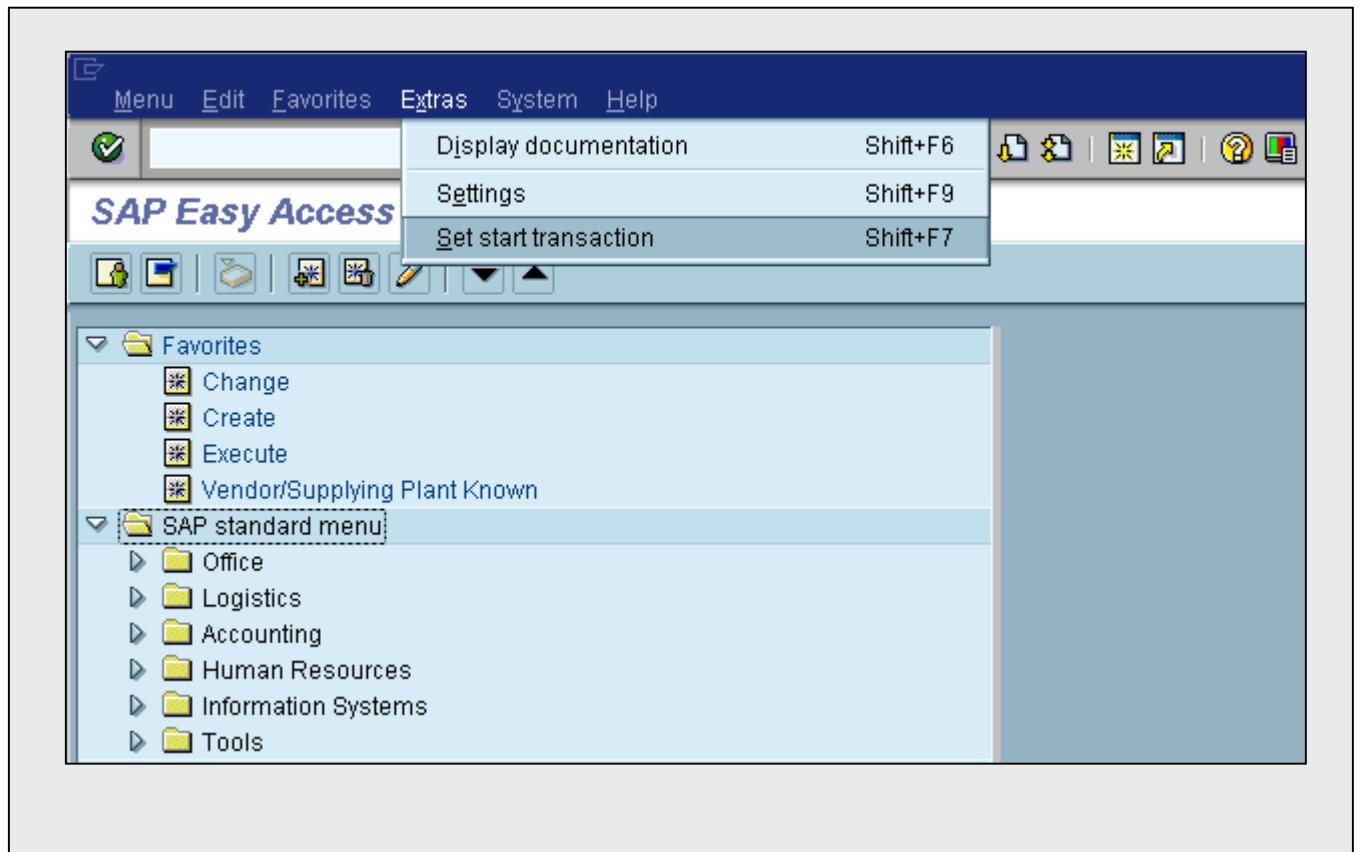
The **Set Start Transaction** option affords direct access to a transaction upon logging onto the system. This option may be beneficial for someone that must perform the same task everyday. For example, if a Customer Sales Representative is responsible for entering sales orders first thing every morning, then it may be beneficial for this individual to set his or her Start Transaction to VA01, the transaction required to create a sales order.

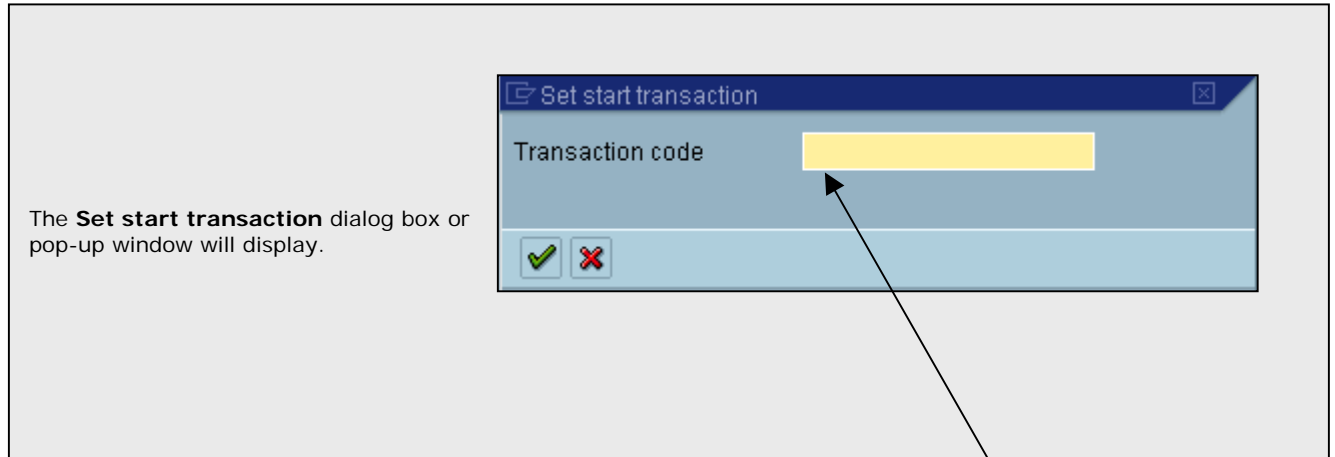
By setting a start transaction, the first screen to come into view, upon logging in, will be the initial screen of the task selected.


Steps for Setting the Start Transaction

To set the Start Transaction, proceed as follows:

1. From the Menu Bar on the SAP Main Menu screen, follow the Menu Path: **Extras > Set start transaction** as shown below.





2. Enter the Transaction code you wish to have as your start transaction in the **Transaction Code** field.
3. Hit the ENTER key on your keyboard or click once with the left mouse button on the  symbol located in the pop-up window.

The transaction you have selected is now your start transaction. The next time you logon, the first screen you will see will be the initial screen of the transaction selected.



NOTE:

- A message in the Status Bar of the screen will confirm the transaction you have selected as your start transaction.

Remove Start Transaction

Exercise: Enter cic0 in transaction code – check to process
Log off – log back on – brings you right to cic0 –
(use yellow arrow to return to SAP menu)

To remove or change a Start Transaction, repeat the steps above, except delete or enter a new transaction code, respectively.



NOTE:

- A message in the Status Bar of the screen will confirm that the Start Transaction has been reset.

Getting Help

Online help is available for the fields, menus, messages, terminology, and reports. When you need help on which value to enter in a field, you can access a list of possible field values, or you can use matchcodes to find a field value.

Help is always available, through the function keys F1 and F4 and the Help menu. Use **F1** to get definitions and descriptions of fields, menus, functions, and messages. Use **F4** to display a list of possible field values or matchcodes.

The Help System at a Glance

The system offers extensive online help: you can get help on:

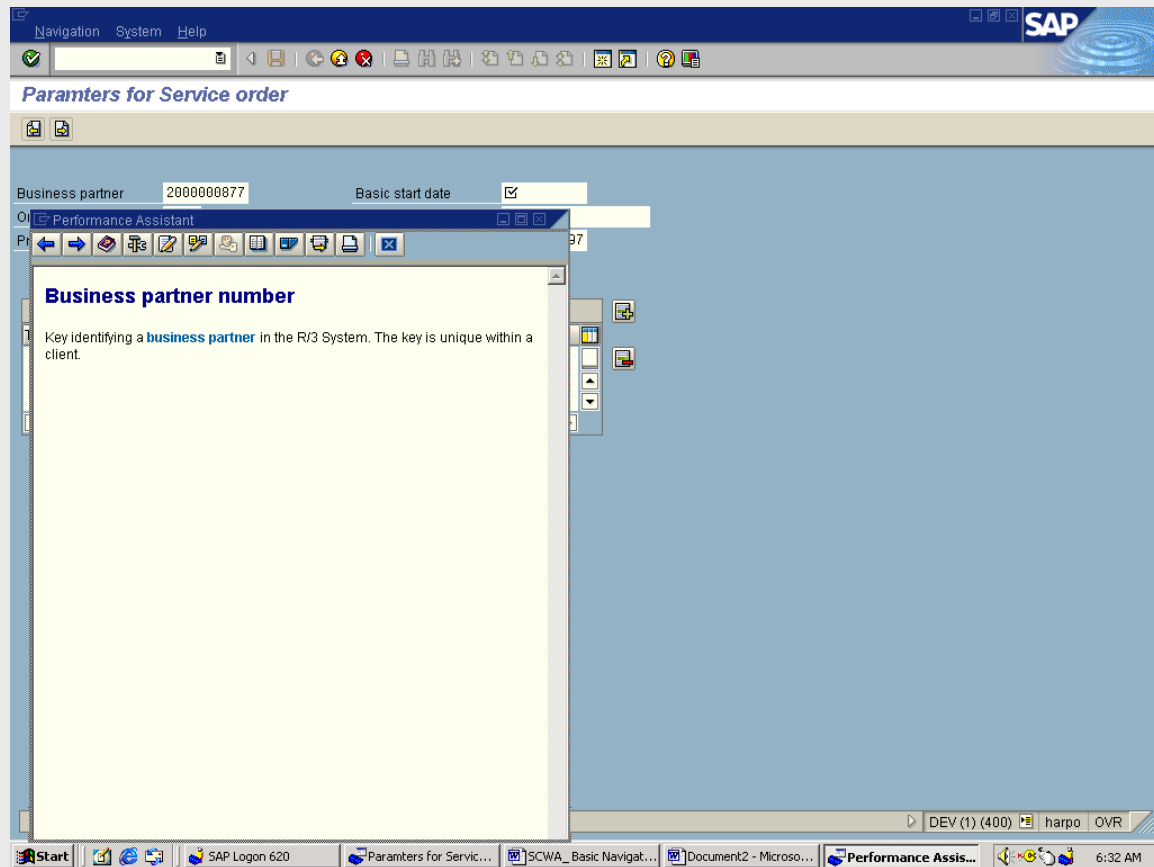
- fields
 - menus and functions
 - messages
 - terminology
 - reports
-
- The SAP on-line help is in HTML format. Once access to help has been realized, links to other help sections are provided.
 - The system provides detailed on-line help. You can call help form each screen in the system by choosing help.
 - The Library is an online library of the entire Documentation. You may search for the information you need or drill down through the applications.

F1 Or Yellow “?” Icon

Getting Help on Fields

Use F1 for help on fields and F4 for information on what values you can enter in a field.

1. Position the cursor on the field in question and click once with the left mouse button. This action will highlight field.
2. Press the F1 key for help or press the F4 key for possible entries.




F1 = Field level help
F4 = Match codes or possible entries

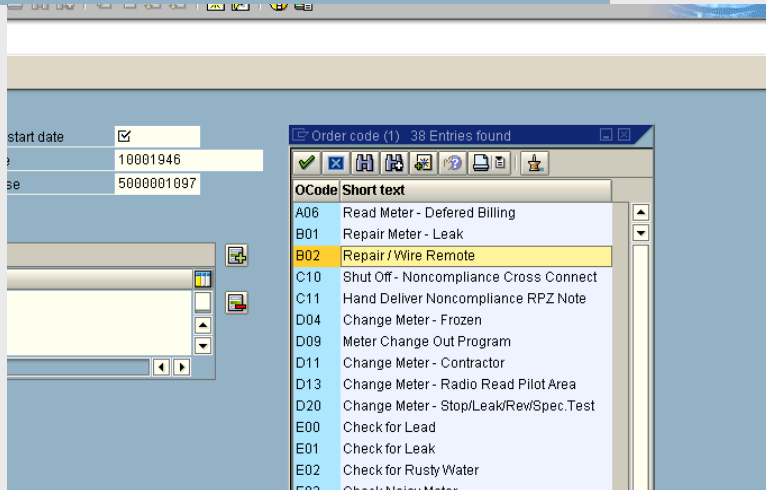
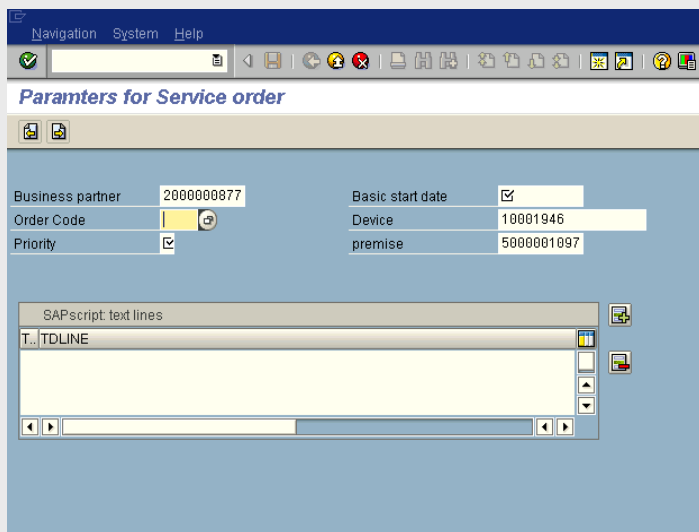
Getting Help on which Value to Enter in a Field

When you need help on which values you may enter in a field, use the F4 key to display a list of possible values or matchcodes. A matchcode is a tool for finding a record that has the field value you need.

To display a list of possible field values or matchcodes:

1. Position the cursor in the field, then select F4 or activate the field by clicking once in the field with the left mouse button and selecting the  icon located to the right of the field.

A list of possible field values is displayed or a list of matchcodes is displayed or a message is displayed in the Status bar stating no values exist. In other words, you enter your own value.




Possible values for the
Order Type field

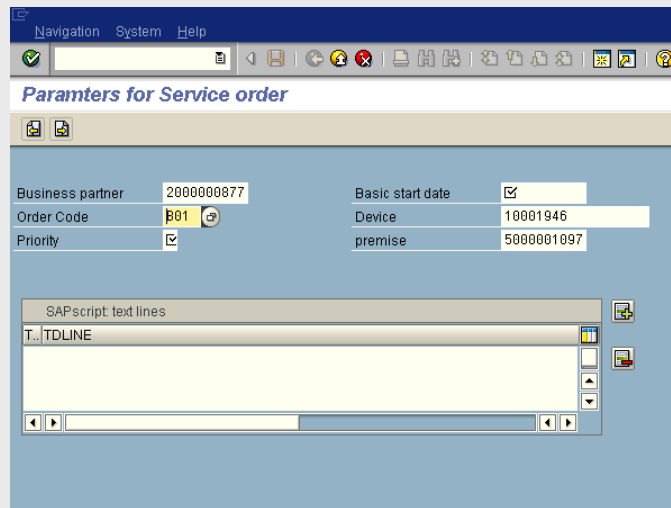
To select a value from the drop down list:

Position the cursor on the entry and double click with the left mouse button

-or-

Position the cursor on the entry and click once with the left mouse button and then select Enter  button located within the drop down menu.


The system inserts the value into appropriate field.



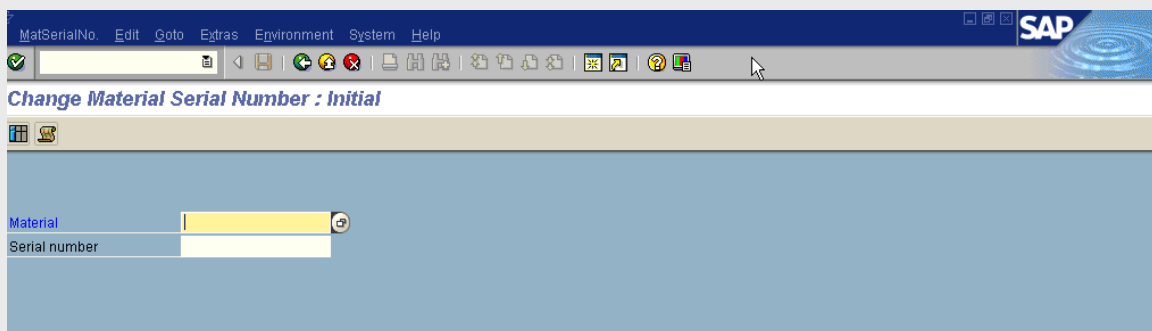
Using a Matchcode search to Determine which Value to Enter in a Field

A matchcode is a tool for finding records. For example, you wish to update a material record, but you do not remember the material number. You can use the information that you do remember about the material, such as the name or part of the name of the material or old material number, to search for the material number. Information such as old material number are search terms.

To display a list of possible matchcodes:

1. Position the cursor in the field, then select F4 or activate the field by clicking once in the field with the left mouse button and selecting the  icon located to the right of the field.

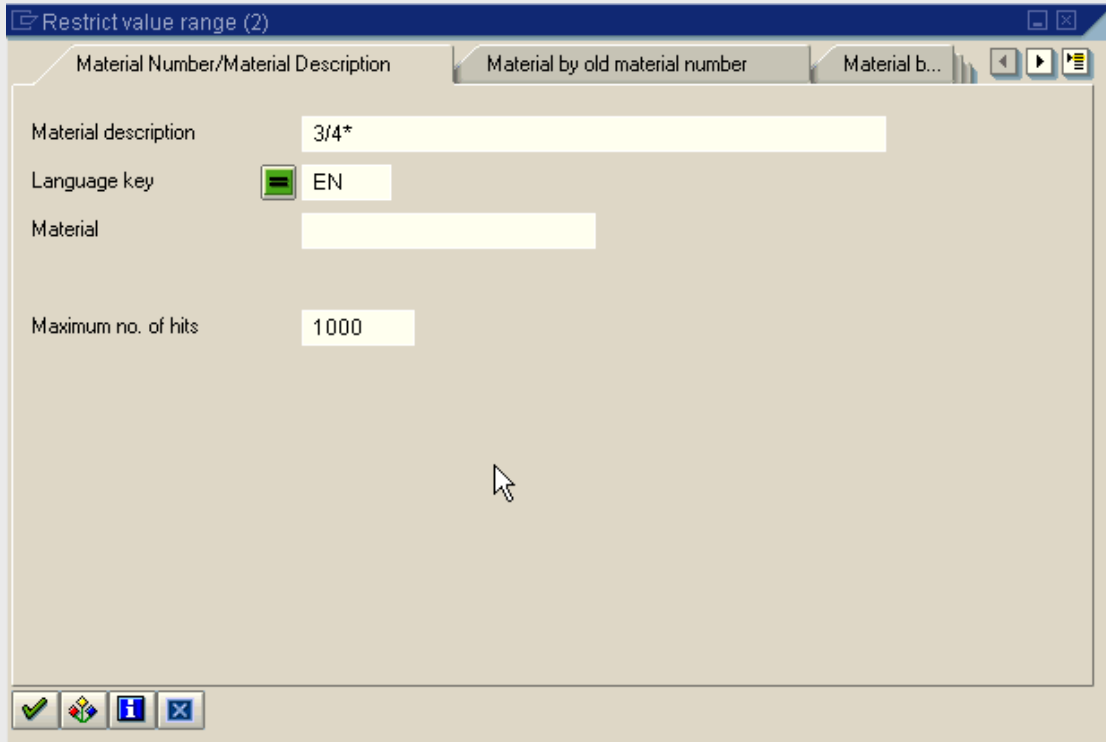
A dialog box will display containing tabs with different matchcode search options.



2. Select the tab containing the Matchcode search option you wish to take advantage of by clicking on it once with the left mouse button. Some fields may default with pre-assigned values.

For this example, we have chosen to search for the Material Number using the **Material Description** option in our search.

Assume that the user knows the Material description Starts with "3/4" ".



A couple of options are available to the user:

1. If the user knows the exact description, he or she may enter the entire description.
2. Utilize the wild card, an asterisk, to substitute for letters or numbers at the beginning or end of the search string.

For example, to search for the Material Description "3/4", the user may enter 3/4* or *3* or *3/4. Whichever option is used, all options containing 3/4 at the beginning of the description, 3 in the middle of the description, and 3/4 at the end of the description will be displayed (See following page).

TIP: When using the wildcard, any combination of known letters or numbers may be used in front of, behind, or between the asterisk(s).

After the Matchcode field is populated with the requisite search criteria, press the ENTER key on your keyboard to arrive at the list of results.

Wild Card search explanation – can also be used if not sure of name, address

* text * ex. Looking for **57 York Avenue** but we are not sure of number or road, ave., street -
Use ***York***

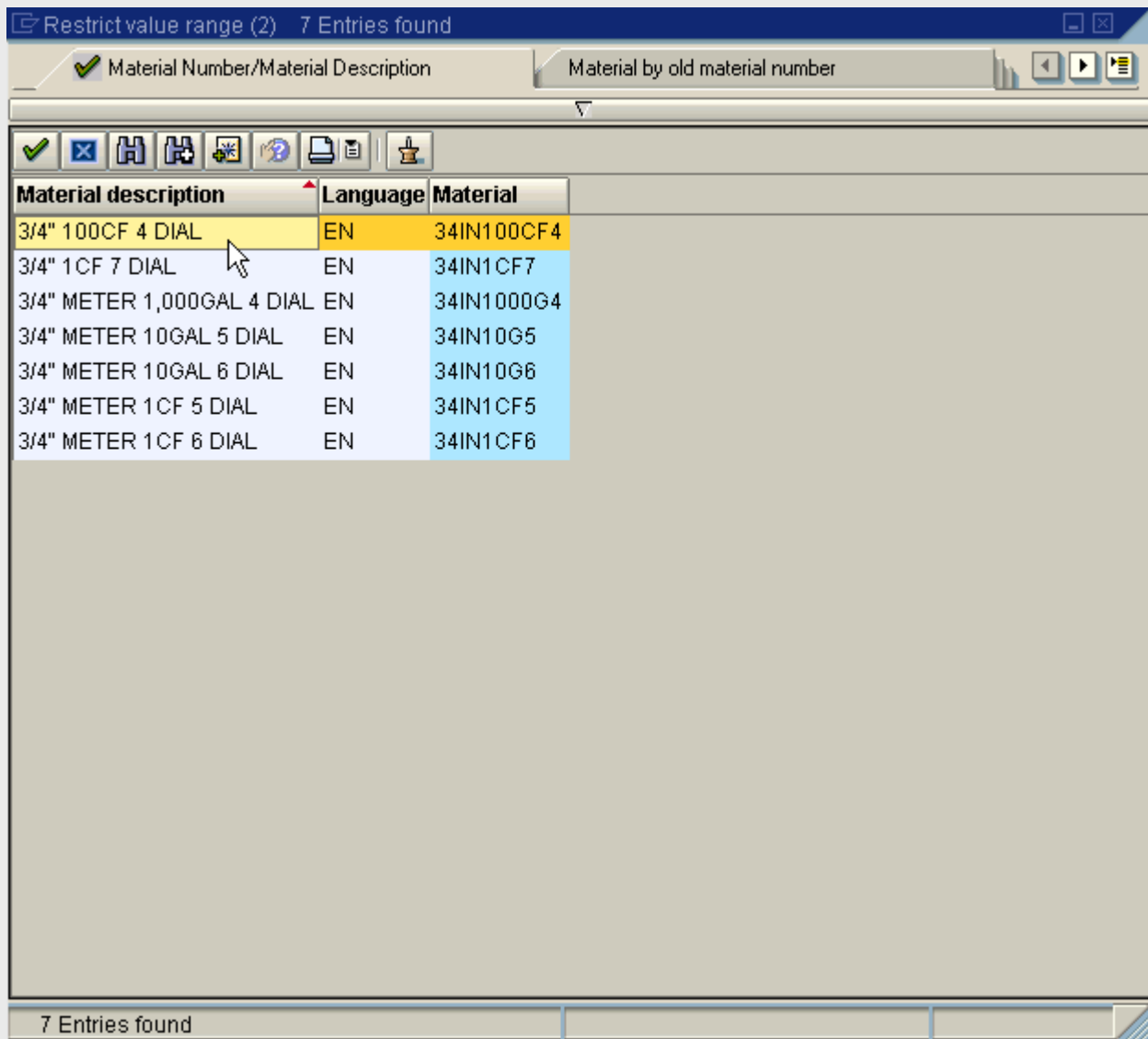
To select a value from the drop down list:

Position the cursor on the entry and double click with the left mouse button

-or-

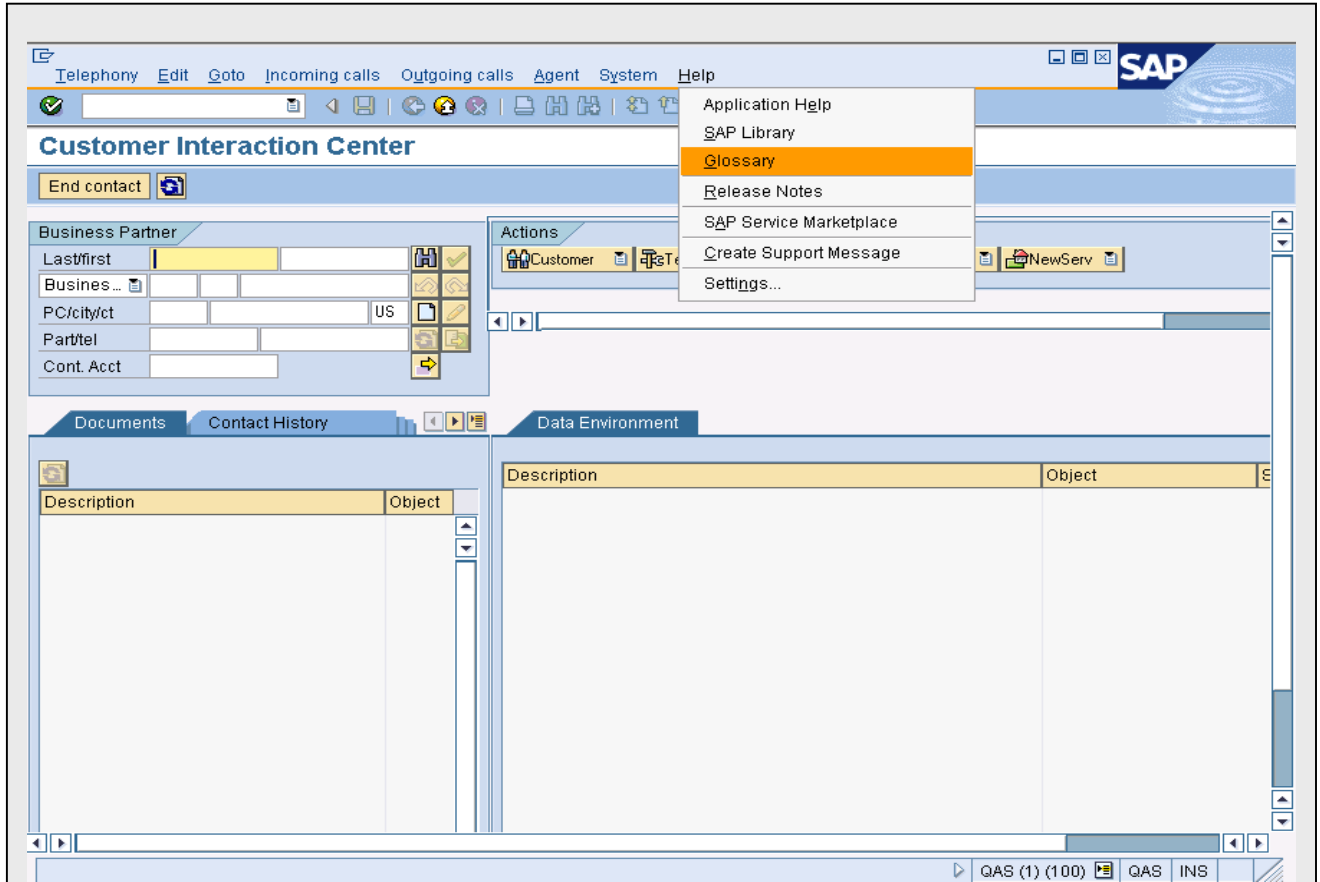
Position the cursor on the entry and click once with the left mouse button and then select Enter button located within the drop down menu.

The system inserts the value into appropriate field.



SAP On-Line Help

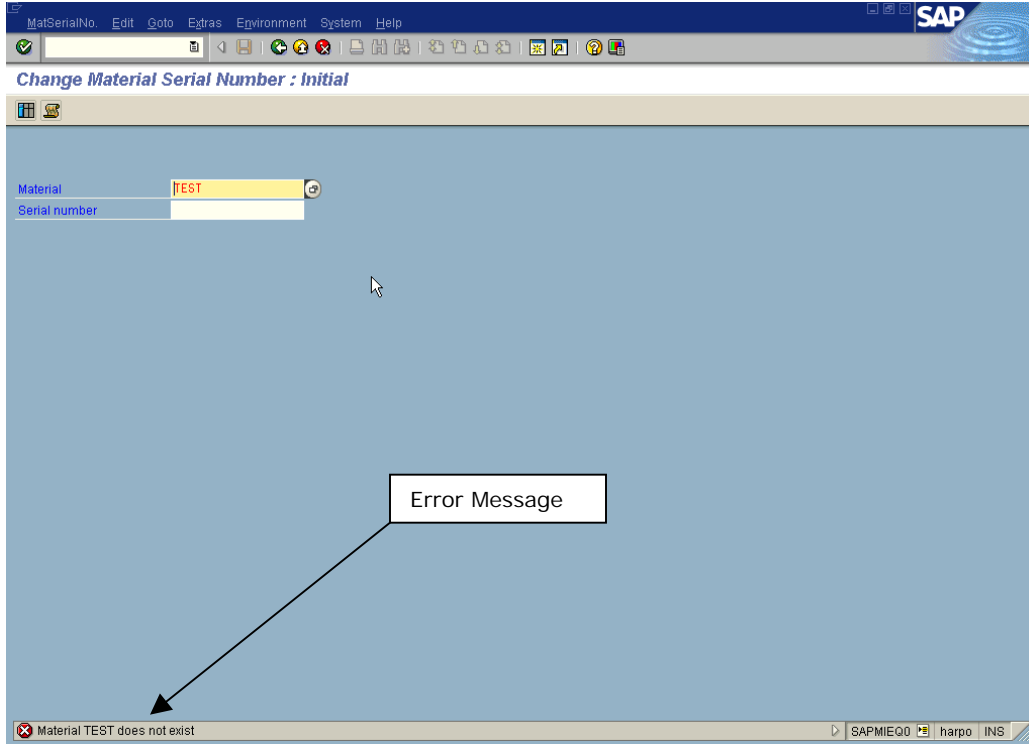
The system provides comprehensive online help. You can display the help from any screen in the system. You always have access to help using the *Help* option located in the Menu Bar.



- Application help** Displays comprehensive help on the current application. Selecting this menu option in the initial screen displays help on getting started .
- SAP Library** This is where all on-line documentation may be found.
- Glossary** Provides a glossary with definitions of terms.
- Release notes** Displays notes that describe functional changes that occur between releases.
- SAP Service Marketplace/SAPNet** Enables you to log on to SAPNet.
- Create Support Message** Permits the user to send a message to the SAPNet Frontend, SAP's service system.
- Settings** Enables you to set up your own personal settings for Help.

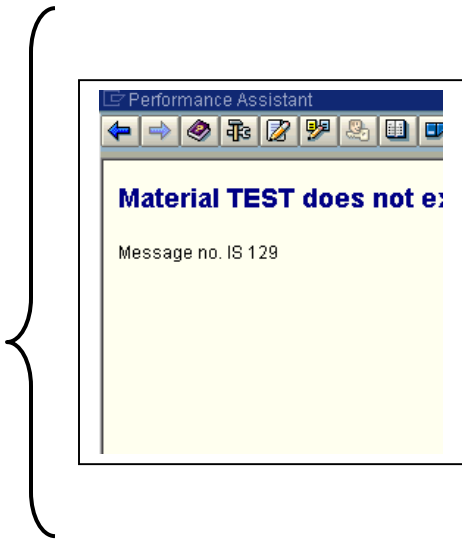
Troubleshooting

Many times during the processing of a transaction the user encounters errors that prevent the transaction from being completed. When this occurs, SAP usually provides a message in the status bar indicating what the error is (see below).



By positioning the cursor on the error message and double-clicking with the left mouse button, a "help" screen will display providing a more detailed explanation of the error message.

There are two kind of messages to be displayed in the Status bar; a warning message that may be bypassed or an error message. Should you receive an error message, the error must first be remedied before proceeding any further.



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Checklist

When processing a transaction within the SAP System and an error will not permit you to proceed, refer to the checklist below.

1. Make certain that dates entered are correct. Some dates will default with the incorrect date.
2. Make certain all required fields are populated. Required fields will usually, but not always, have a checkmark within the field as depicted below.

REQUIRED FIELDS WILL HAVE A BOX WITH A CHECKMARK → 

3. Utilize the Field Help F4 or F1 to ensure that the correct value is entered in each field.
4. When encountering an error message within the Status Bar, double-click on the message to arrive at a detailed explanation of the error.
5. Utilize the Application Help by following the Menu Path: **Help >> Application Help** to arrive at a view providing comprehensive help on the current application.
6. Utilize the on-line glossary by following the Menu Path: **Help >> Glossary** to arrive at a providing a Glossary of terms.

Windows Commands (Cut/Copy/Paste)

Ctrl-C, Ctrl-V

- Used to copy information from one field to another

To copy a field in SAP

- Highlight the field by dragging across the field with your mouse
- Press Ctrl-C
- The information is copied to the clipboard

To paste the data copied

- Use Ctrl-V
- The information on the clipboard is pasted into the selected field

Ctrl-Y, Ctrl-C, Ctrl-V

- Used to copy a range of data from a document

To copy a range of fields

- Press Ctrl-Y - Cursor will change to a cross (+)
- Highlight the fields

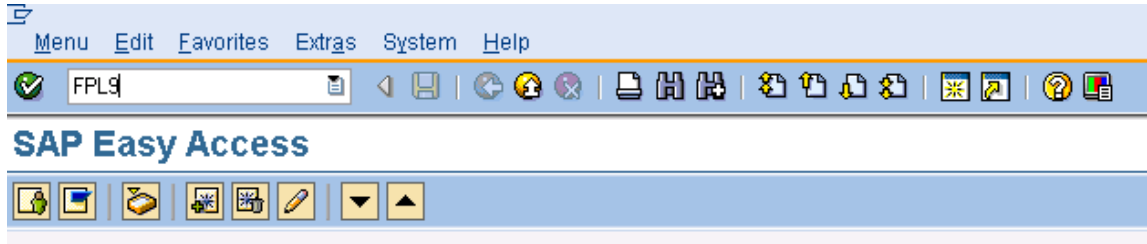
To copy a field in SAP

- Highlight the field by dragging across the field with your mouse
- Press Ctrl-C
- The information is copied to the clipboard

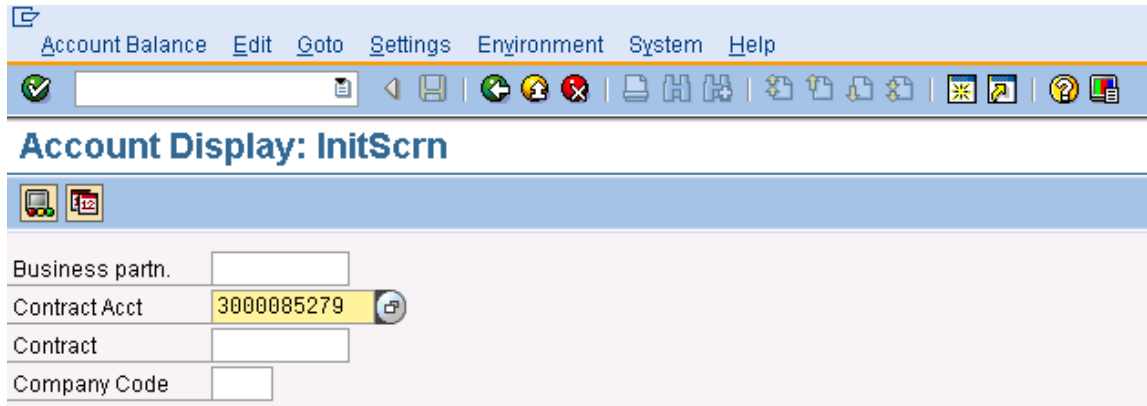
To paste the data copied

- Use Ctrl-V
- The information on the clipboard is pasted into the selected field

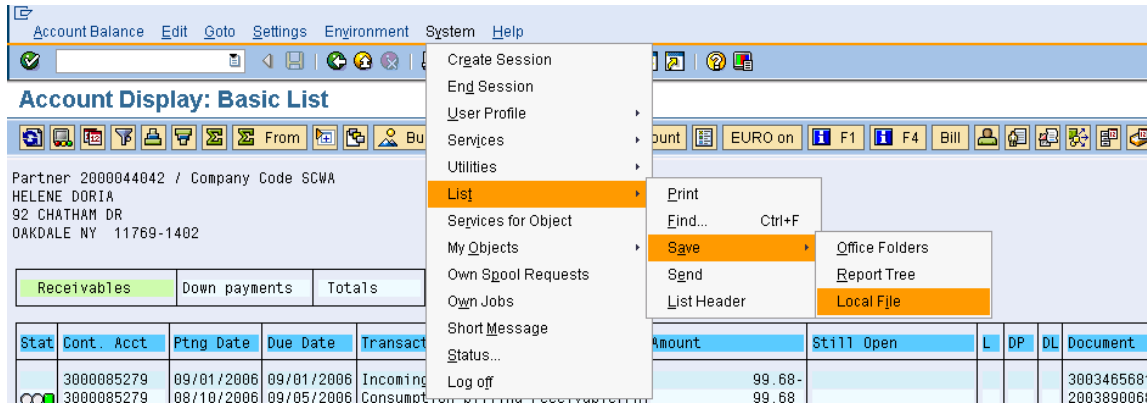
Download Data To Spreadsheet



- FPL9 in the command line

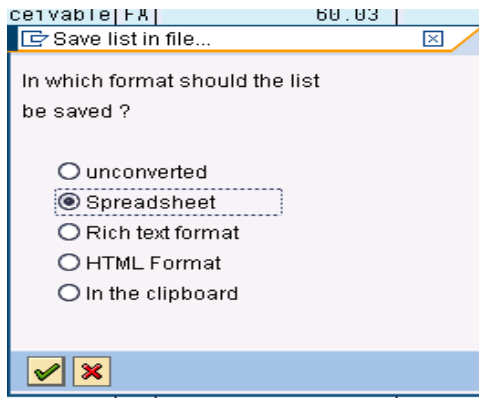


- Enter contract account #

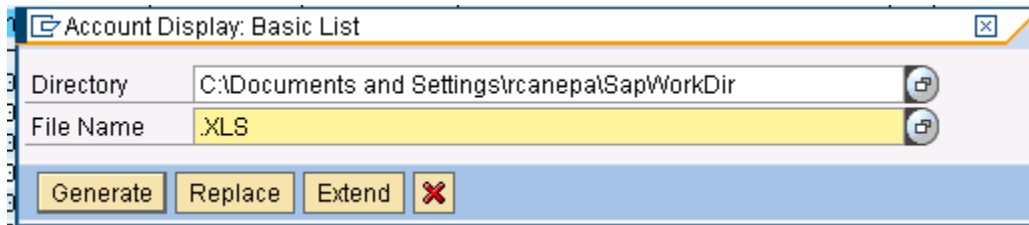


- From the account balance screen SYSTEM > LIST > SAVE > LOCAL FILE

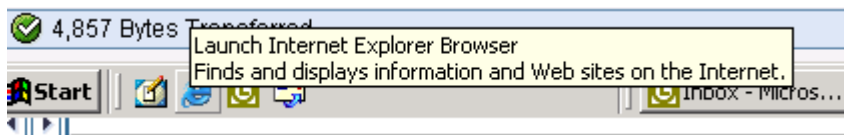
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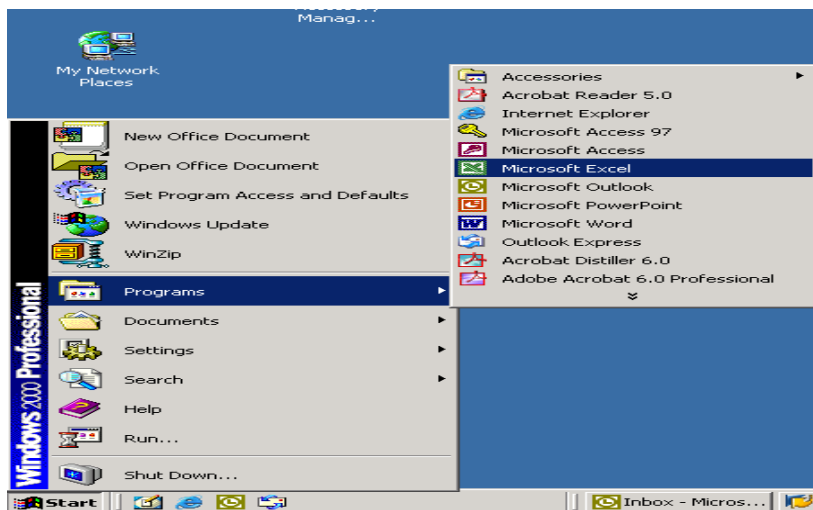
- Select **Spreadsheet**
- Green check



- Name of downloaded file and its extension
- Select **Generate**

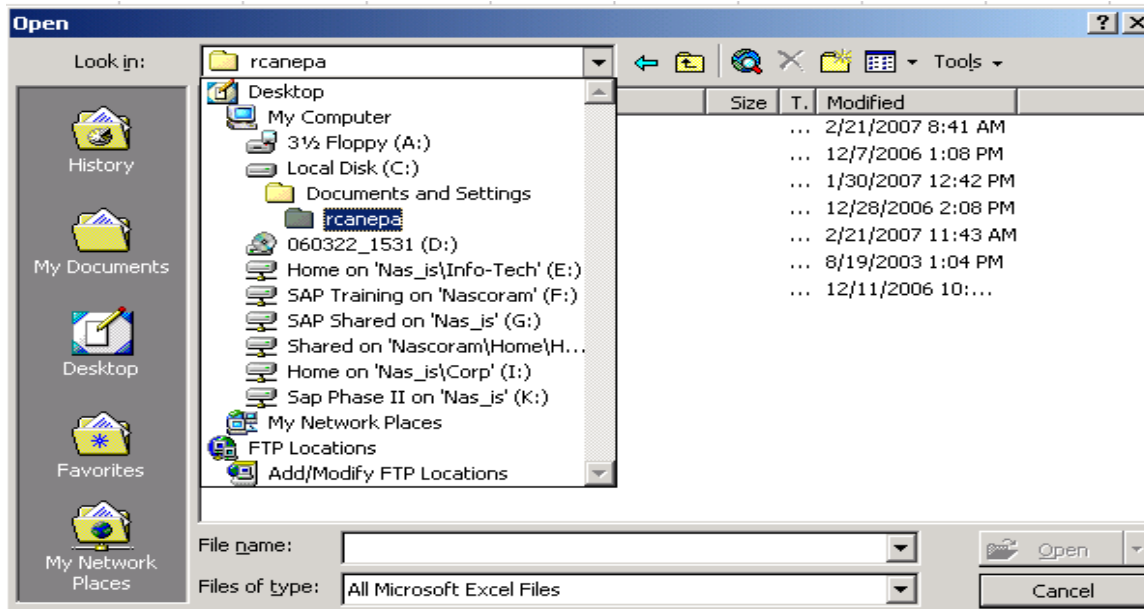


- Note the message at the bottom of the screen “####Bytes Transferred “

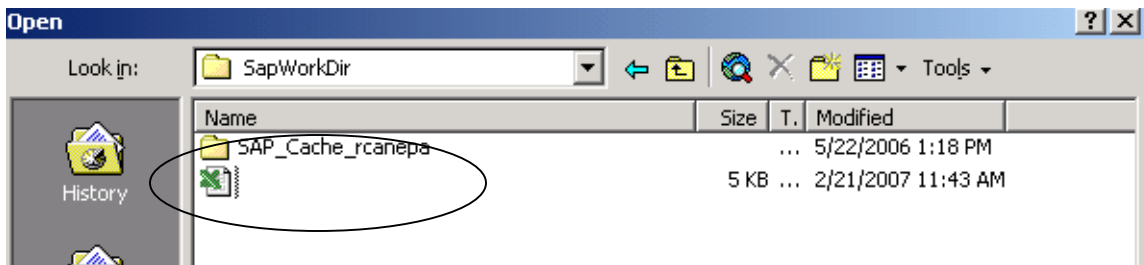
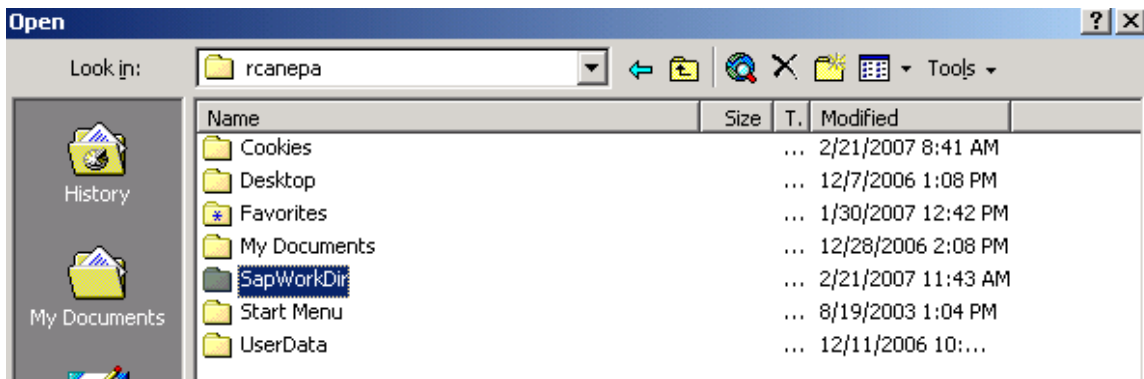


- Open Excel

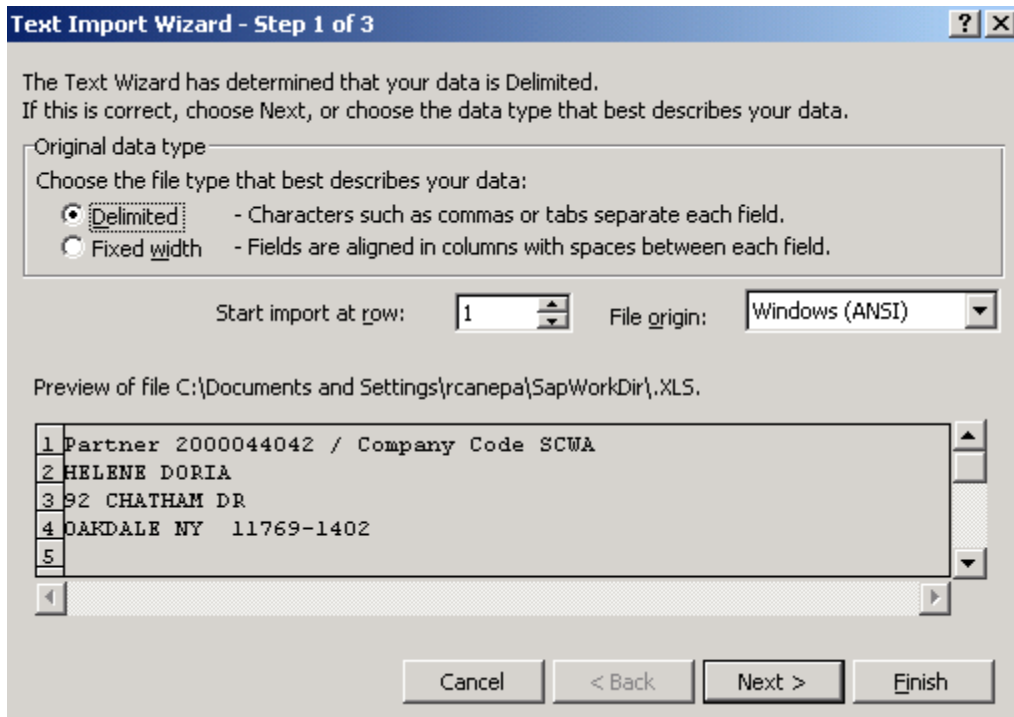
mySAP ERP 2005 Basic Navigation Training



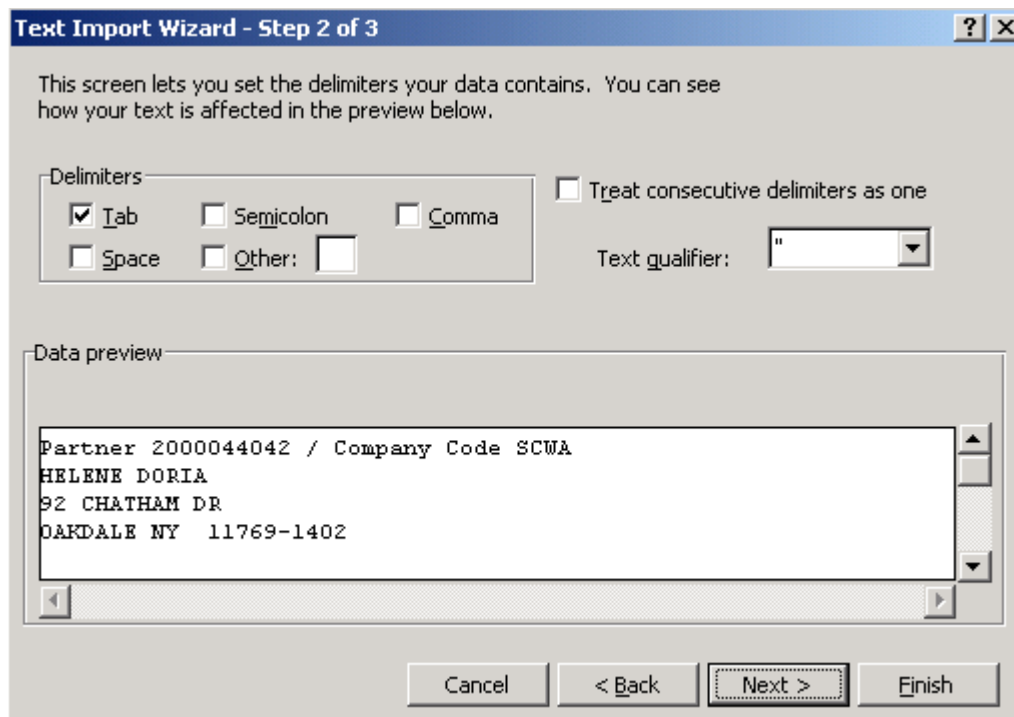
- Navigate to locate file



- File Located at : C:\Documents and Settings\rcanepa\SapWorkDir
- Note the excel spreadsheet created 2/21/07
- Double click to open the file

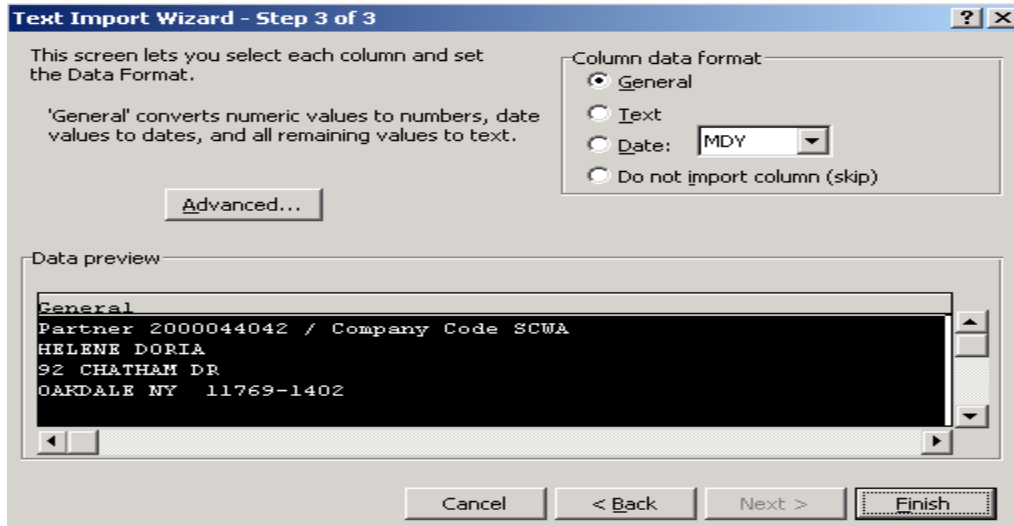


- Step 1: - Delimited > Next



- Step 2: Delimiters – Tab >Next

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- Step 3: Finish

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Partner 2000044042 / Company Code SCWA														
2	HELENE DORIA														
3	92 CHATHAM DR														
4	OAKDALE NY 11769-1402														
5															
6															
7	Receivables			Down payments			Totals			Payment liChronology					
8															
9															
10	Stat		Cont. Acct	Ptng Date		Due Date		Transaction		DT	Amount	Still Open	L		
11															
12			3E+09	9/1/2006		9/1/2006		Incoming payment		BA	-99.68				
13			3E+09	8/10/2006		9/5/2006		Consumption billing receivable		FA	99.68				
14			3E+09	6/6/2006		6/6/2006		Incoming payment		BA	-60.03				
15			3E+09	5/11/2006		6/5/2006		Consumption billing receivable		FA	1				
16			3E+09	5/11/2006		6/5/2006		Consumption billing receivable		FA	60.03				
17			3E+09	4/27/2006		5/22/2006		Credit IVR Reading		AB	-1				
18			3E+09	3/7/2006		3/7/2006		Incoming payment		BA	-82.48				
19			3E+09	2/10/2006		3/6/2006		Consumption billing receivable		FA	1				
20			3E+09	2/10/2006		3/6/2006		Consumption billing receivable		FA	82.48				
21			3E+09	2/1/2006		2/27/2006		Credit IVR Reading		AB	-1				
22			3E+09	12/6/2005		12/6/2005		Incoming payment		BA	-149.09				
23			3E+09	11/9/2005		12/5/2005		Consumption billing receivable		FA	1				
24			3E+09	11/9/2005		12/5/2005		Consumption billing receivable		FA	149.09				
25			3E+09	11/2/2005		#####		Credit IVR Reading		AB	-1				
26			3E+09	9/7/2005		9/7/2005		Incoming payment		BA	-93.02				
27			3E+09	8/10/2005		9/6/2005		Consumption billing receivable		FA	1				

- Widen the columns, if necessary

Download Data Via Icon

The screenshot shows the SAP Customer Contacts interface. The toolbar at the top contains various icons for data manipulation. The Microsoft Excel icon, which depicts a green spreadsheet, is circled in red. Below the toolbar, a table of contact data is visible, with the first row highlighted in yellow.

Partner	Date	Time	Clas...	Text for Cont. Class	Act.	Contact Action	Text for Business Partner
2000082724	08/07/1997	11:26:59	15	Converted Contacts	1	Readings/Billings	VALENTINE RYAN / 155 LAUREL RD / E. NORTH
2000082724	03/26/2004	15:33:25	4	Field Work	1	Service Order Created	VALENTINE RYAN / 155 LAUREL RD / E. NORTH
2000082724	04/13/2004	11:05:13	6	Customer	2	Business Partner Changed	VALENTINE RYAN / 155 LAUREL RD / E. NORTH
2000082724	04/14/2004	11:41:44	4	Field Work	6	Vault Condition/Repairs	VALENTINE RYAN / 155 LAUREL RD / E. NORTH
2000082724	04/19/2004	10:52:08	6	Customer	4	Contract Account Changed	VALENTINE RYAN / 155 LAUREL RD / E. NORTH
2000082724	04/21/2004	15:17:16	7	Technical	1	Connect Object Changed	VALENTINE RYAN / 155 LAUREL RD / E. NORTH
2000082724	05/03/2004	08:53:00	4	Field Work	1	Service Order Created	VALENTINE RYAN / 155 LAUREL RD / E. NORTH

- Select the Microsoft Excel icon

The first screenshot shows the SAP Customer Contacts screen with the Microsoft Excel icon selected in the toolbar. The second screenshot shows the resulting Excel spreadsheet, which contains the same contact data as the SAP table. The spreadsheet is titled "Business Partner" and has columns for Business Partner, Date, Time, Contact Class, Text for Cont. Class, Act., Contact Action, and Text for Business Partner.

Business Partner	Date	Time	Contact Class	Text for Cont. Class	Act.	Contact Action	Text for Business Partner
2000082724	8/7/1997	11:26:59	15	Converted Contacts	1	Readings/Billings	VALENTINE RYAN / 155 LAUREL RD / E
2000082724	3/26/2004	15:33:25	4	Field Work	1	Service Order Created	VALENTINE RYAN / 155 LAUREL RD / E
2000082724	4/13/2004	11:05:13	6	Customer	2	Business Partner Changed	VALENTINE RYAN / 155 LAUREL RD / E
2000082724	4/14/2004	11:41:44	4	Field Work	6	Vault Condition/Repairs	VALENTINE RYAN / 155 LAUREL RD / E
2000082724	4/19/2004	10:52:08	6	Customer	4	Contract Account Changed	VALENTINE RYAN / 155 LAUREL RD / E
2000082724	4/21/2004	15:17:16	7	Technical	1	Connect Object Changed	VALENTINE RYAN / 155 LAUREL RD / E
2000082724	5/3/2004	8:53:00	4	Field Work	1	Service Order Created	VALENTINE RYAN / 155 LAUREL RD / E
2000082724	5/21/2004	10:39:18	10	Finance	2	Charges Posted	VALENTINE RYAN / 155 LAUREL RD / E
2000082724	5/27/2004	14:57:28	6	Customer	2	Business Partner Changed	VALENTINE RYAN / 155 LAUREL RD / E
2000082724	5/28/2004	14:03:33	7	Technical	4	Installation Changed	VALENTINE RYAN / 155 LAUREL RD / E
2000082724	5/28/2004	14:04:11	7	Technical	4	Installation Changed	VALENTINE RYAN / 155 LAUREL RD / E
2000082724	5/28/2004	14:04:45	7	Technical	4	Installation Changed	VALENTINE RYAN / 155 LAUREL RD / E
2000082724	5/28/2004	14:05:11	7	Technical	4	Installation Changed	VALENTINE RYAN / 155 LAUREL RD / E
2000082724	5/28/2004	14:05:41	7	Technical	4	Installation Changed	VALENTINE RYAN / 155 LAUREL RD / E
2000082724	5/28/2004	14:06:12	7	Technical	4	Installation Changed	VALENTINE RYAN / 155 LAUREL RD / E
2000082724	5/28/2004	14:06:38	7	Technical	4	Installation Changed	VALENTINE RYAN / 155 LAUREL RD / E
2000082724	5/28/2004	14:07:17	7	Technical	4	Installation Changed	VALENTINE RYAN / 155 LAUREL RD / E
2000082724	6/1/2004	12:33:08	10	Finance	2	Charges Posted	VALENTINE RYAN / 155 LAUREL RD / E
2000082724	6/2/2004	16:52:19	10	Finance	2	Charges Posted	VALENTINE RYAN / 155 LAUREL RD / E
2000082724	6/2/2004	17:14:01	2	Billing	1	Bill Reprinted	VALENTINE RYAN / 155 LAUREL RD / E
2000082724	6/3/2004	10:33:24	10	Finance	2	Charges Posted	VALENTINE RYAN / 155 LAUREL RD / E
2000082724	6/7/2004	10:21:06	6	Customer	12	Business Partner Changed	VALENTINE RYAN / 155 LAUREL RD / E

- System creates an excel spreadsheet of the contact data

The screenshot shows the Microsoft Excel 'File' menu. The 'Save Copy As...' option is highlighted in blue, indicating it has been selected. Other visible options include 'New...', 'Open...', 'Update', and 'Save as Web Page...'.

- Saved as Contact Spreadsheet Download under my directory