

# SAP-FI NAVIGATION

➤ SAP Logon.....	1
➤ How to Change Password.....	4
➤ Menu Bar/Tool Bar.....	6
➤ Standard Tool Bar.....	7
○ Buttons/Function.....	8
➤ How to Turn On Technical Names.....	9
➤ How to Change System Settings.....	11
○ Printer Setup.....	12
○ Decimal Notation.....	12
○ Date Format.....	13
➤ How to Expand the Menu Path.....	14
➤ How to Enter a Transaction Code.....	16
➤ Creating a Favorite.....	18
○ Customizing Your Favorites.....	20
○ Creating Your Own Subfolders Under Favorites.....	21
➤ Navigation Symbols.....	23
➤ Creating a New Session.....	26
➤ Status Bar.....	27
➤ Determining the Current Transaction Code.....	28
➤ Field Entry Searches.....	29
➤ Required Input Fields.....	30
➤ Tabs.....	31
➤ Switching Screens Quickly.....	31
➤ Aborting a transaction .....	32
➤ How to Log Off.....	33

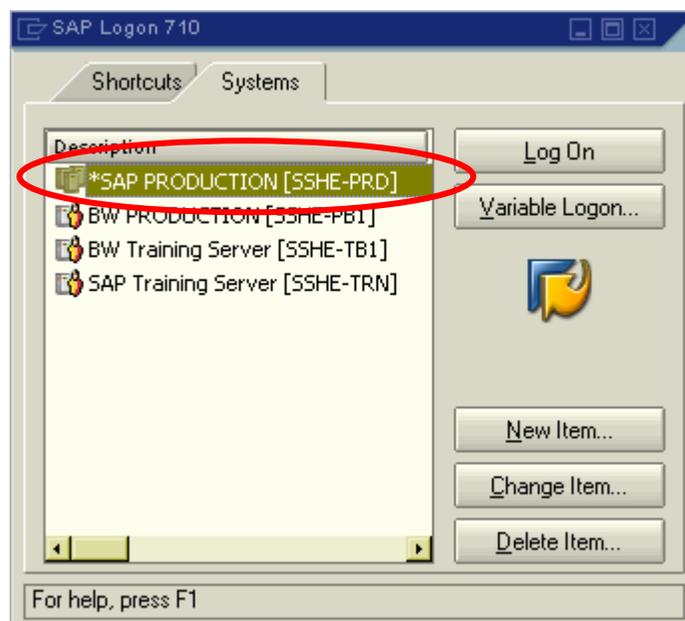
## SAP LOGON

You should have the following icon on your desktop. If you do not have it, you should contact Information Technology desktop support to load the SAP GUI on your computer.



- Double click on the above icon

Clicking on the SAP icon, will cause the following pop-up window to appear:



**CAUTION:**  
NEVER click on the Delete Item button. You will delete whatever is highlighted under the "Description" column!

Note: You can see four items on the above screen: SAP Production (SSHE-PRD), BW Production (SSHE-PB1), BW Training Server (SSHE-TB1) and SAP Training Serving (SSHE-TRN)

- Click on Log On to SAP Production [SSHE-PRD]

The following window will appear:

- ❑ Click in the User field to add your user name. Username will be 60, first initial and last name (ex: 60jmariacher)
- ❑ Click in the Password field to type your password. Note: The asterisks will remain in view. You do not need to delete them, just enter your password over them.

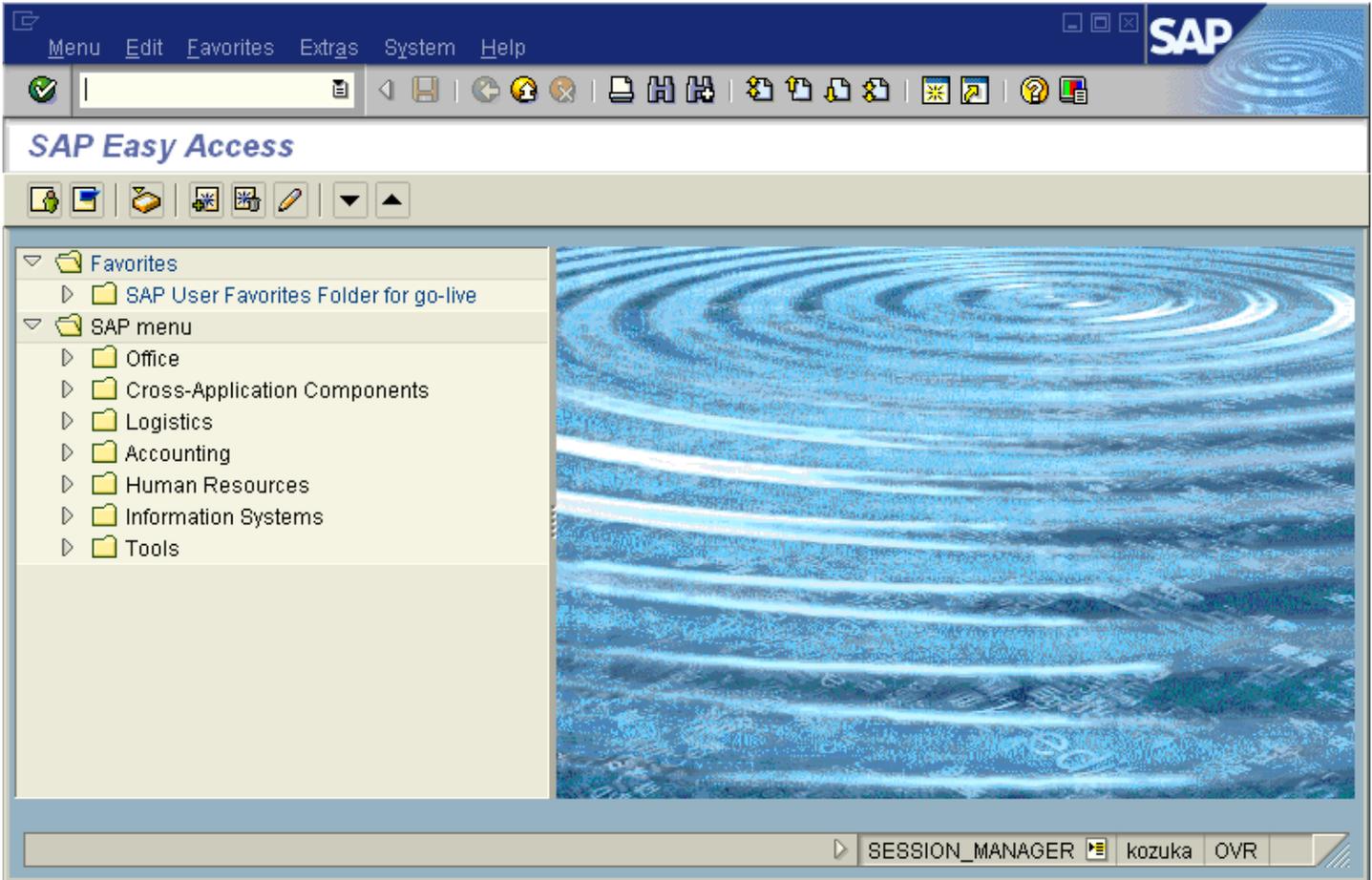
#### IMPORTANT INFORMATION:

Each person has an individual logon and password and will reset their own once logged into the system.

- Passwords must be 8 characters
- Passwords cannot contain the same first three characters (example: User ID = 60jmariacher, password cannot begin with 60j.)
- You will be alerted to change your password every 90 days
- When changing your password, you cannot use the last 5 passwords that were used
- Passwords are case-sensitive
- Passwords may not contain punctuation

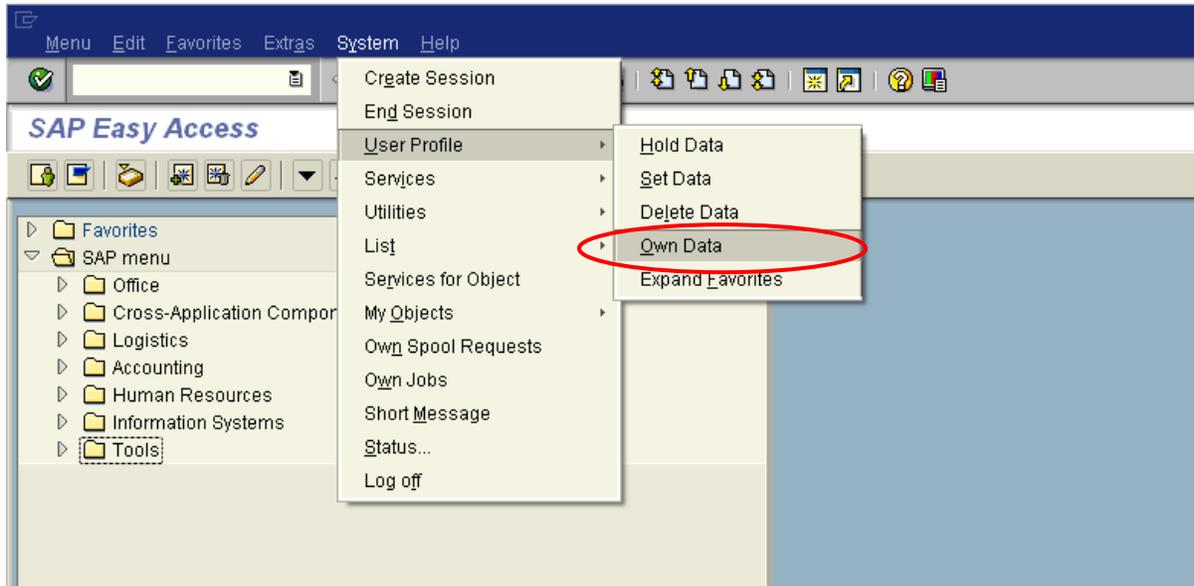
- ❑ Click on the green check mark  or press enter.

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

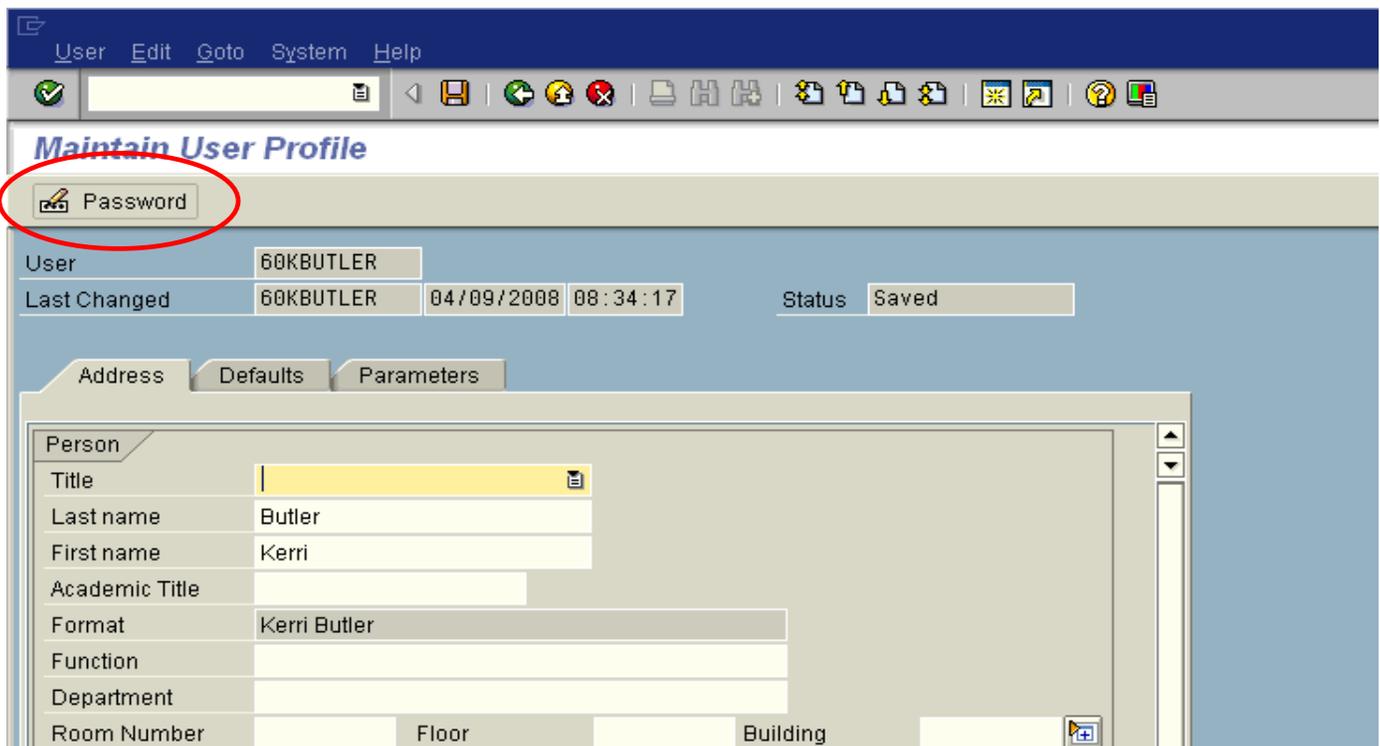


## HOW TO CHANGE YOUR PASSWORD

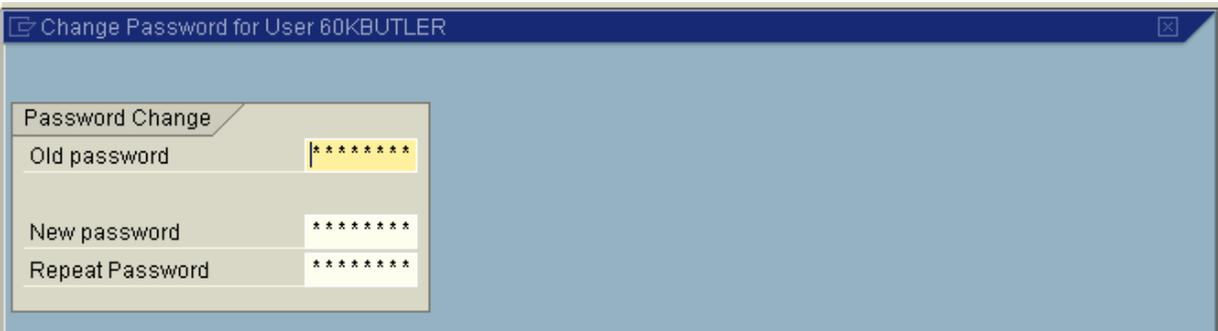
- Once logged in, navigate to *Own Data*, by clicking *System – User Profile – Own Data* as shown below:



- Click on *Password*, which is circled below

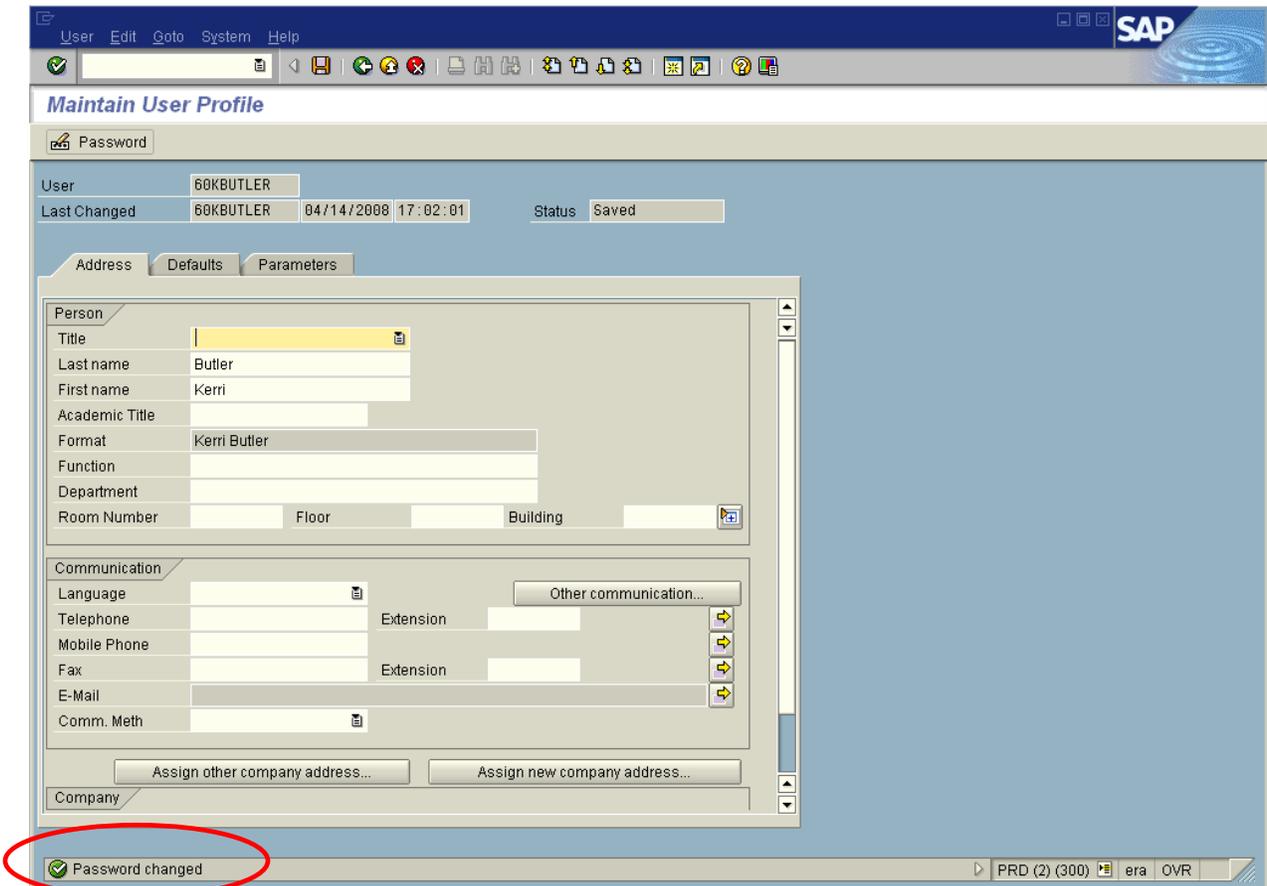


The following dialog box will appear, and once you type your current password in at the yellow box, you can change it by entering it as your *New Password* as well as confirming it in your *Repeat Password*.



The image shows a dialog box titled "Change Password for User 60KBUTLER". It contains three input fields: "Old password" (with a yellow highlight), "New password", and "Repeat Password". All fields contain asterisks representing masked text.

You will get a note in the status bar and possibly in a dialog box as well on your screen to let you know your password has been changed correctly.



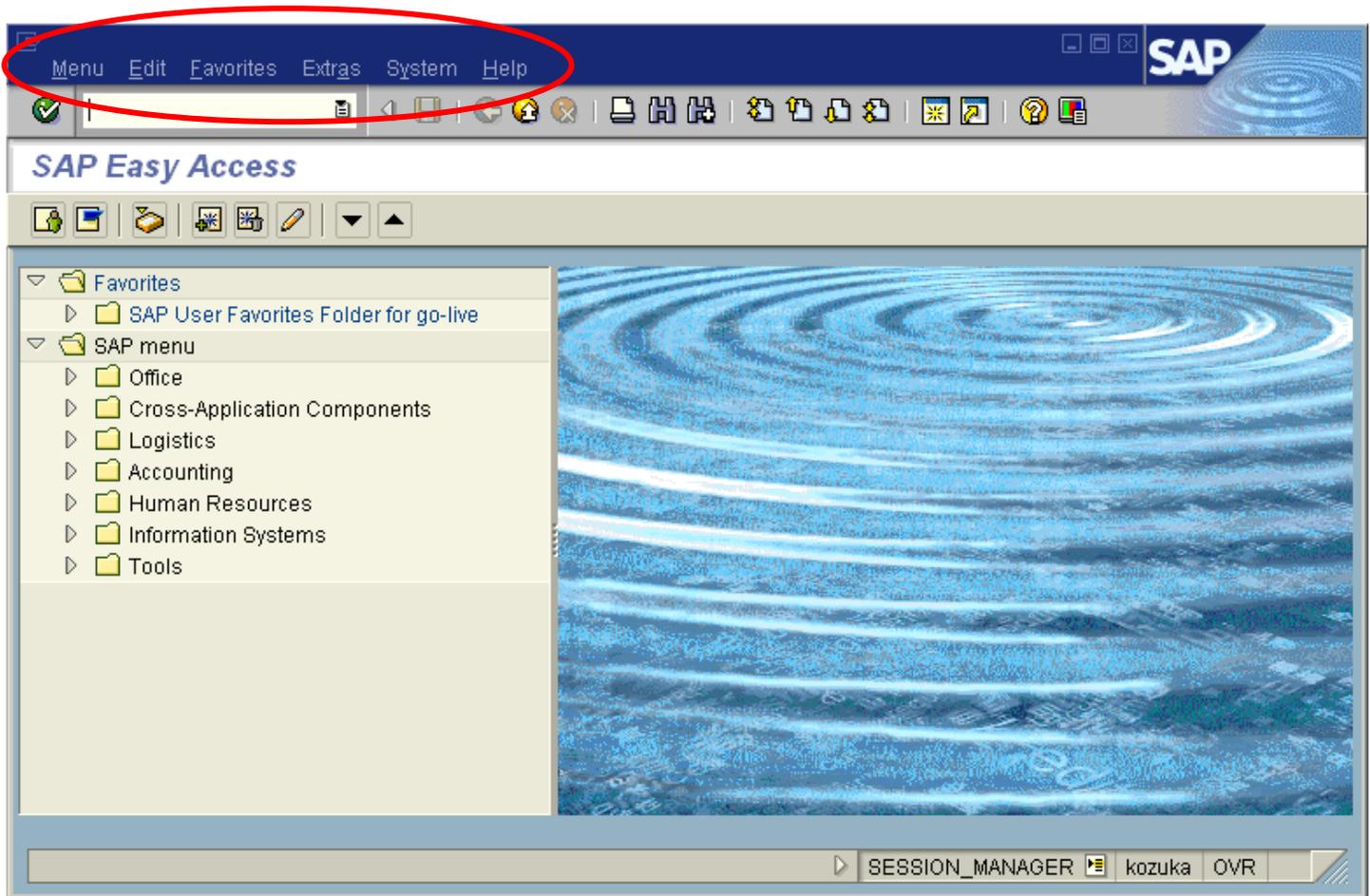
The image shows the "Maintain User Profile" dialog box for user 60KBUTLER. The "Password" tab is selected. The "Person" section shows fields for Title, Last name (Butler), First name (Kerri), Academic Title, Format (Kerri Butler), Function, Department, Room Number, Floor, and Building. The "Communication" section shows fields for Language, Telephone, Extension, Mobile Phone, Fax, Extension, E-Mail, and Comm. Meth. The "Company" section has buttons for "Assign other company address..." and "Assign new company address...". The status bar at the bottom shows a green checkmark and the text "Password changed", which is circled in red. The status bar also displays "PRD (2) (300) era OVR".

## MENU BAR/TOOL BAR

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

*Menu Edit Favorites Extras System Help*

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



## STANDARD TOOLBAR

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



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

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

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

## Standard Toolbar (Buttons/Functions)

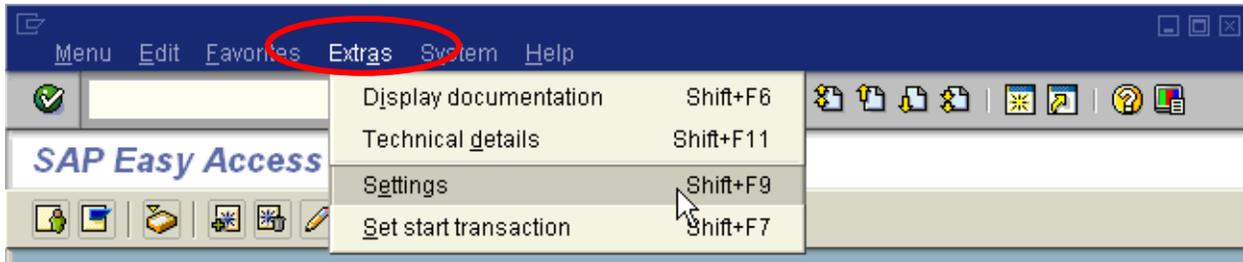
Button	Name	Function
	Enter	Confirms the data you have selected or entered on the screen. Same function as the Enter key. Does not save your work.
	Command field	Allows you to enter commands, such as transaction codes.
	Save	Saves your work. Same function as <i>Save</i> in the <i>Edit</i> menu.
	Back	Returns you to the previous screen without saving your data. If there are required fields on the screen, these fields must be completed first.
	Exit	Exits the current function without saving. Returns you to the initial screen or main menu screen.
	Cancel	Exits the current task without saving. Same function as <i>Cancel</i> in the <i>Edit</i> 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 <i>Create session</i> in the <i>System</i> menu. <b>(Tip: maximum 7 sessions can be open at one time)</b>
	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 TURN ON TECHNICAL NAMES

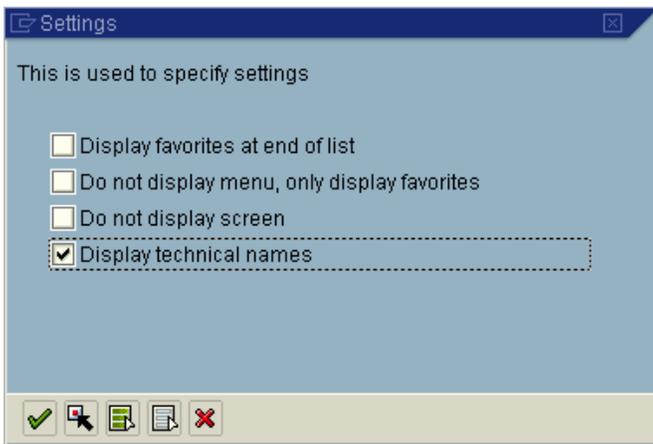
**NOTE: The Budget Office has already completed this step for you prior to training.**

When working in the SAP system, it is useful to display the technical names of the transactions. The technical names are used for quick entry by entering the name in the command field.

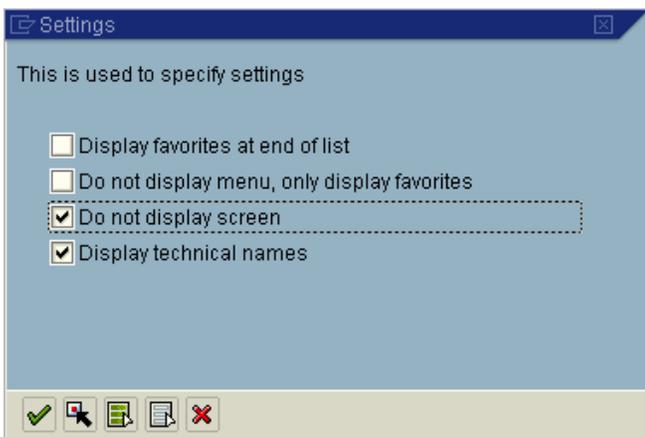
In order to display the technical names, you will need to access the Extras option of the Menu Bar.



You should then choose settings options. You must make sure the “Display Technical Names” box is checked.



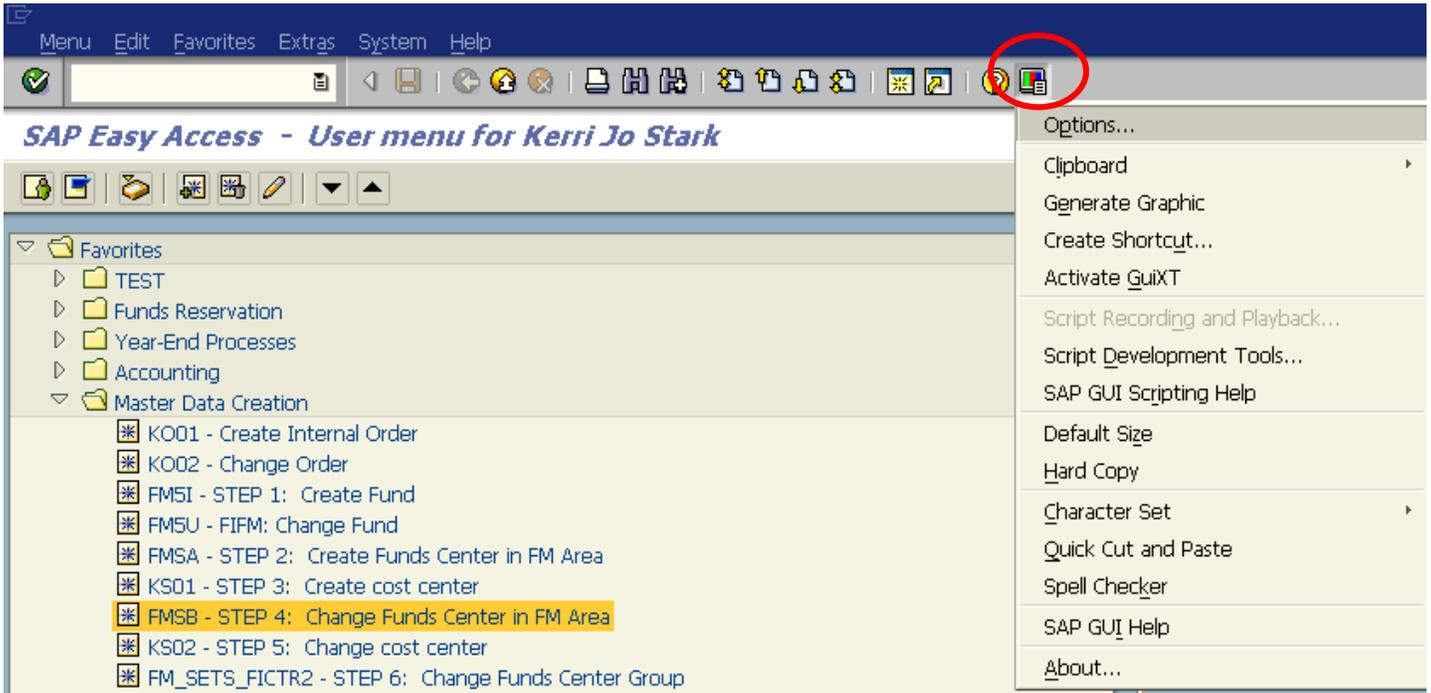
In addition, at this point you can also opt to turn off the display screen (whirlpool).



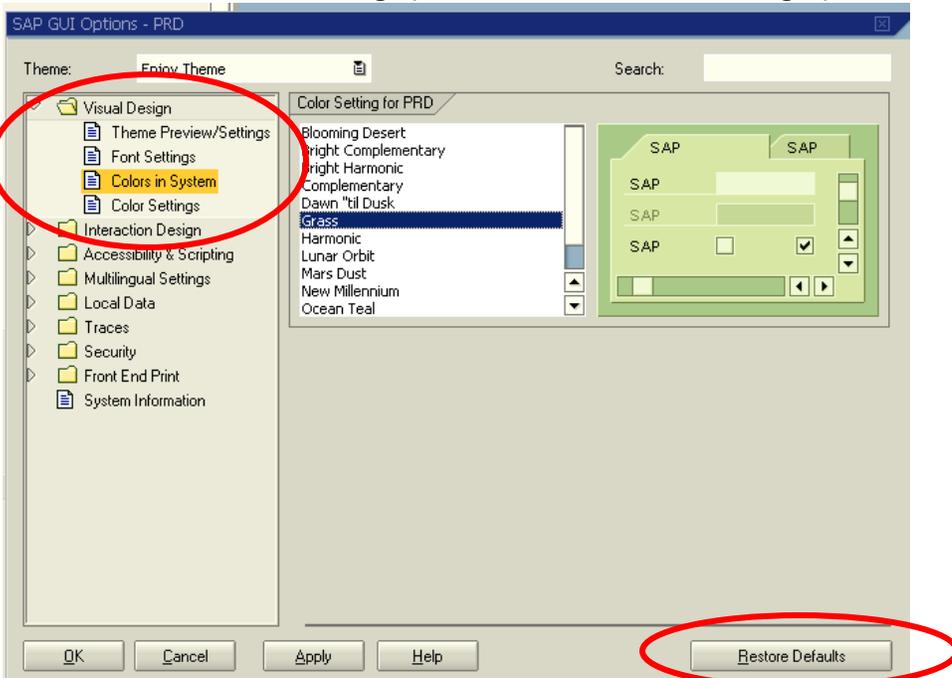
## HOW TO CHANGE SYSTEM DISPLAY

When working in the SAP system, you can choose to change the system color.

- ❑ Click on Customize Local Layout icon– select *Options*



- ❑ This screen allows you to make changes to the theme, font and color settings if you choose to or to restore default settings (button located on bottom right).



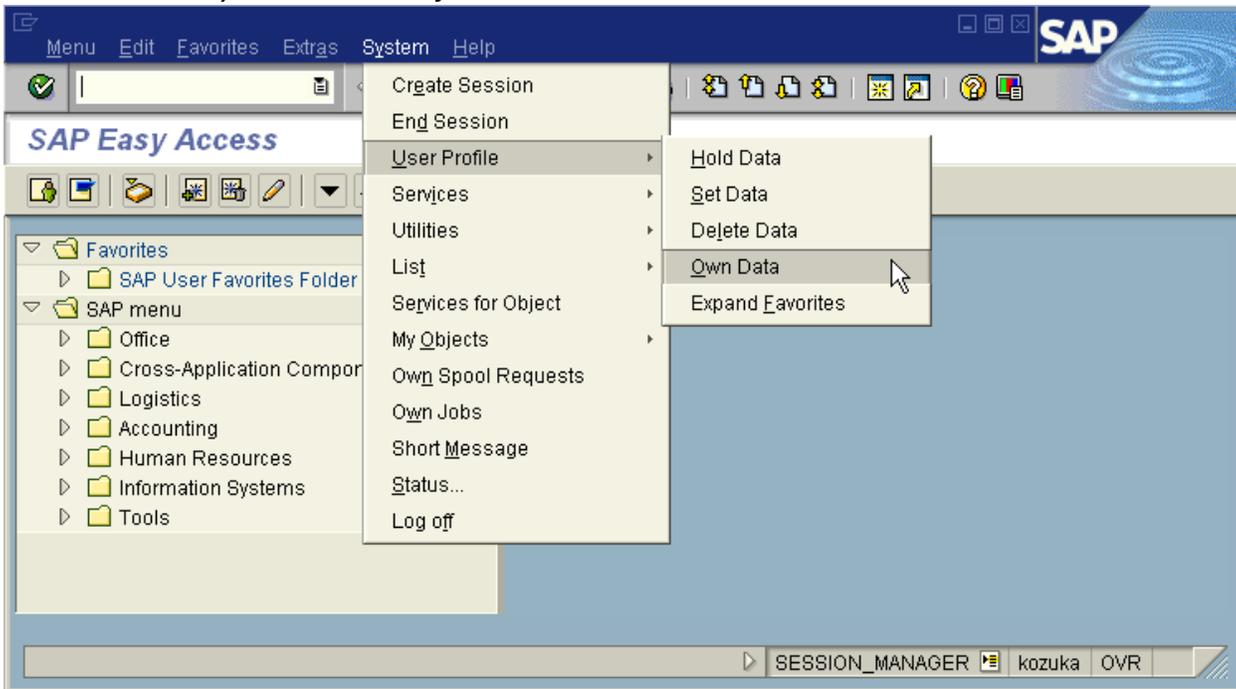
## HOW TO CHANGE SYSTEM SETTINGS

**NOTE: The Budget Office has already completed this step for you prior to training.**

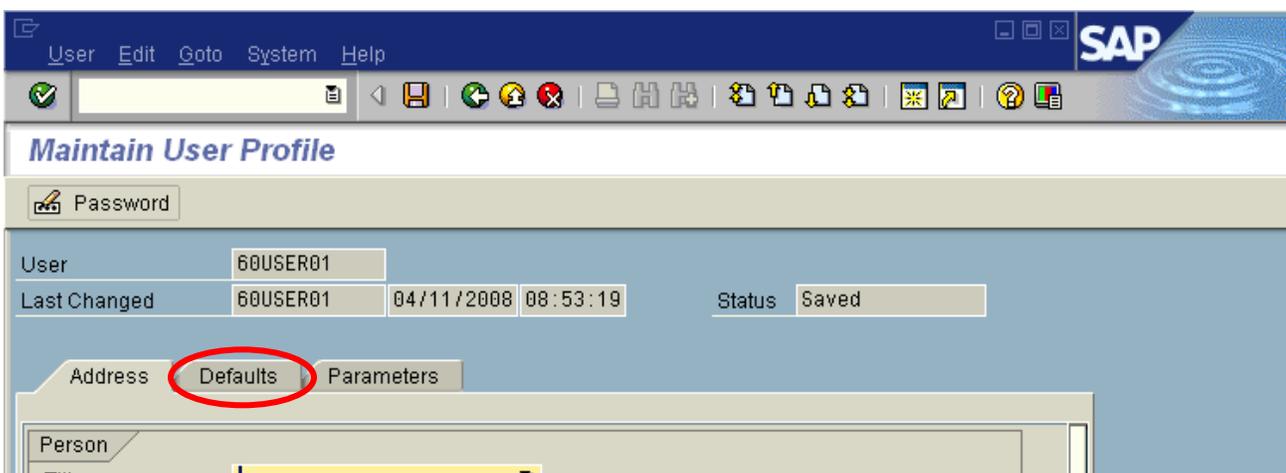
### Printer Setup

**Before printing a SAP report you need to change your SAP settings**

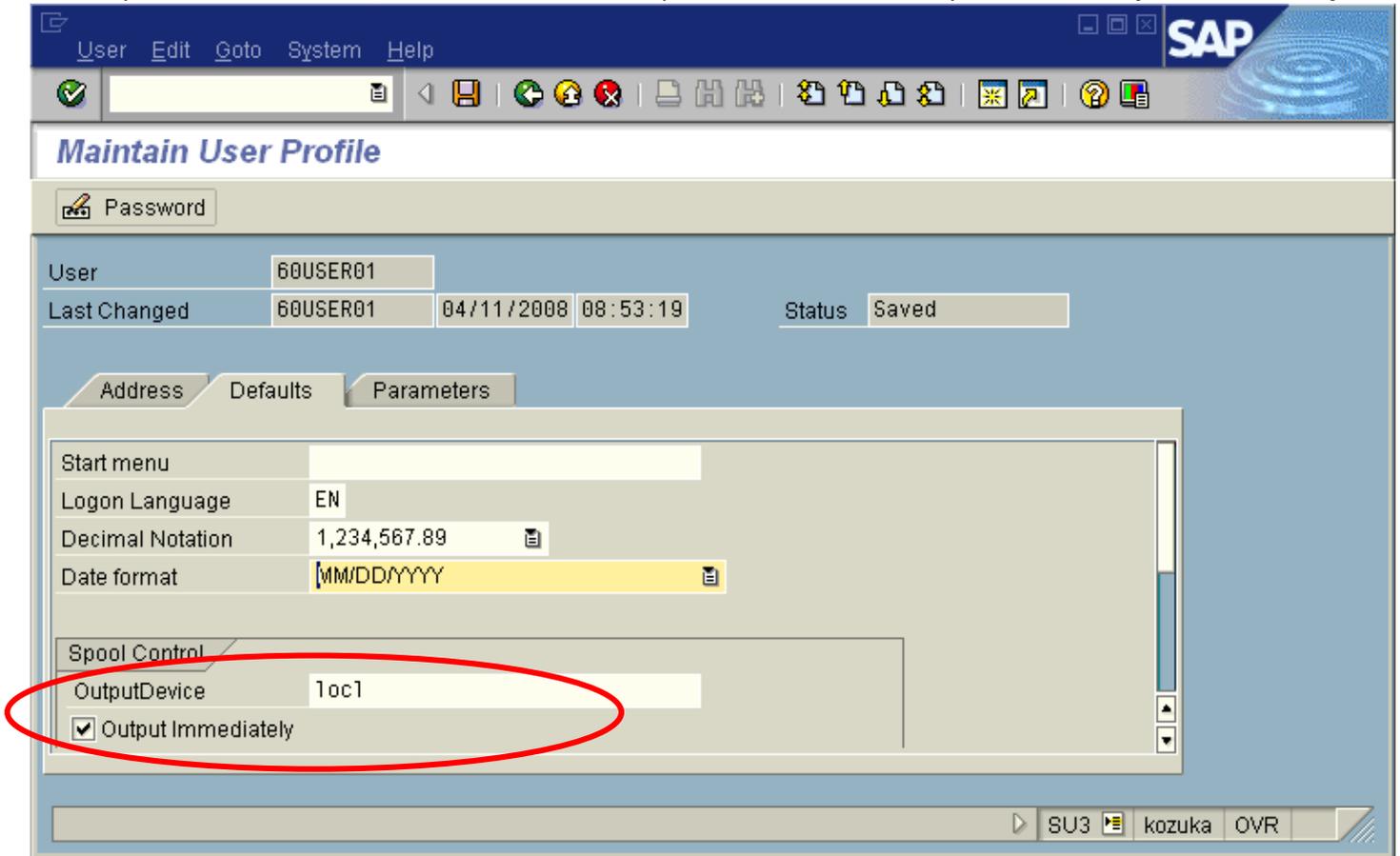
- ❑ Click on *System – User Profile – Own Data*



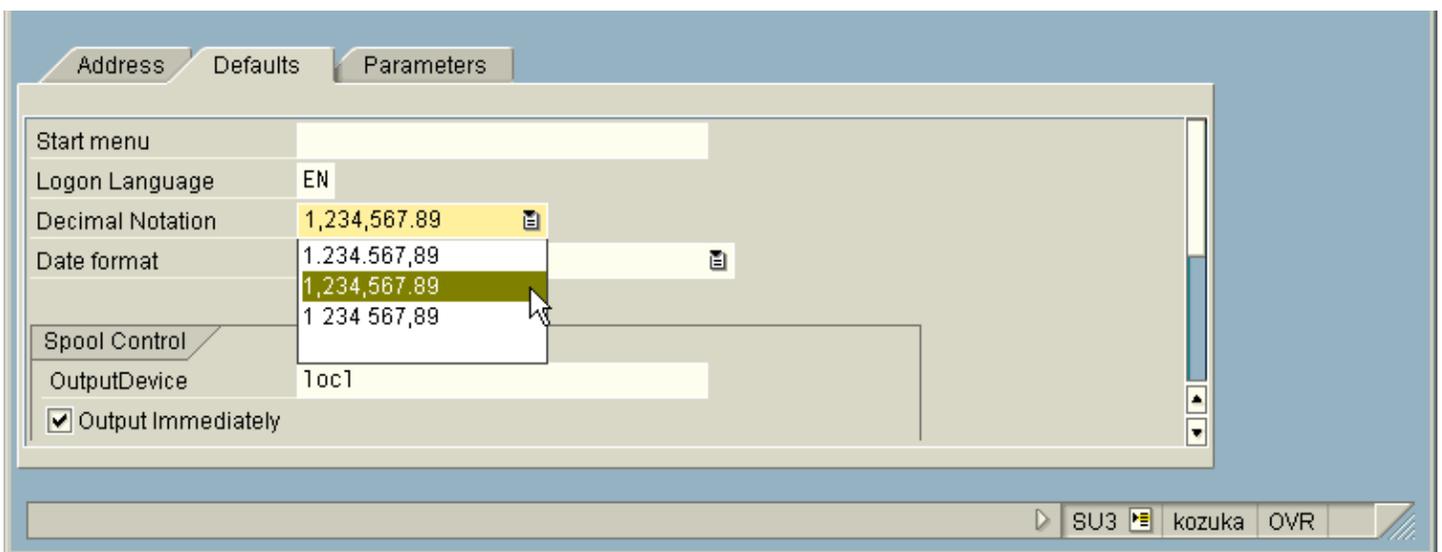
- ❑ The *Maintain User Profile* will be displayed. Click on the defaults tab.



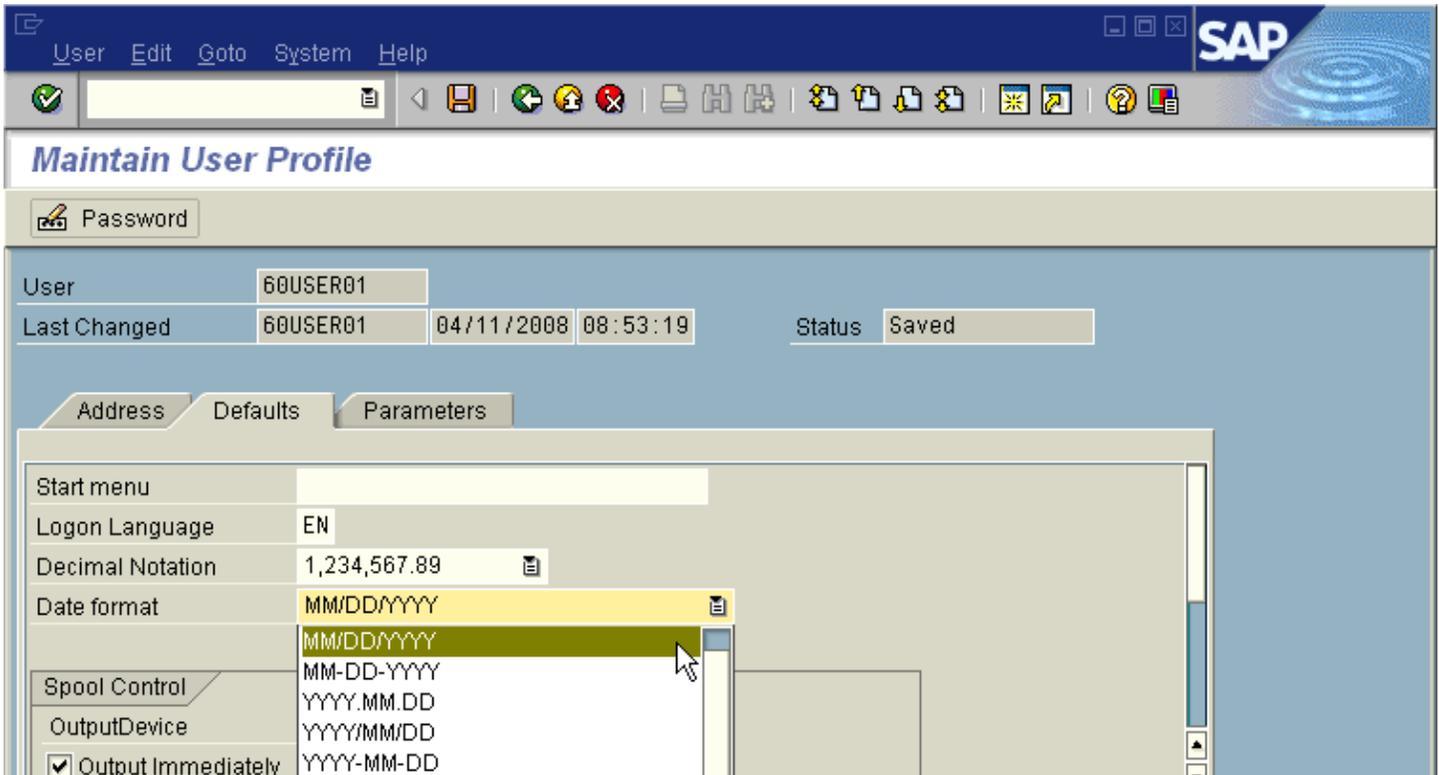
In the Spool Control Section, enter **“loc1”** as the output device. Make sure you check **“Output Immediately”**.



- ❑ To change the decimal notation – click on the *Decimal Notation* drop down list and choose the second option for USA currency format.



- ❑ To change the date format – click on the *Date Format* drop down list and choose the first option MM/DD/YYYY.



- ❑ Click the Save icon to save the settings 

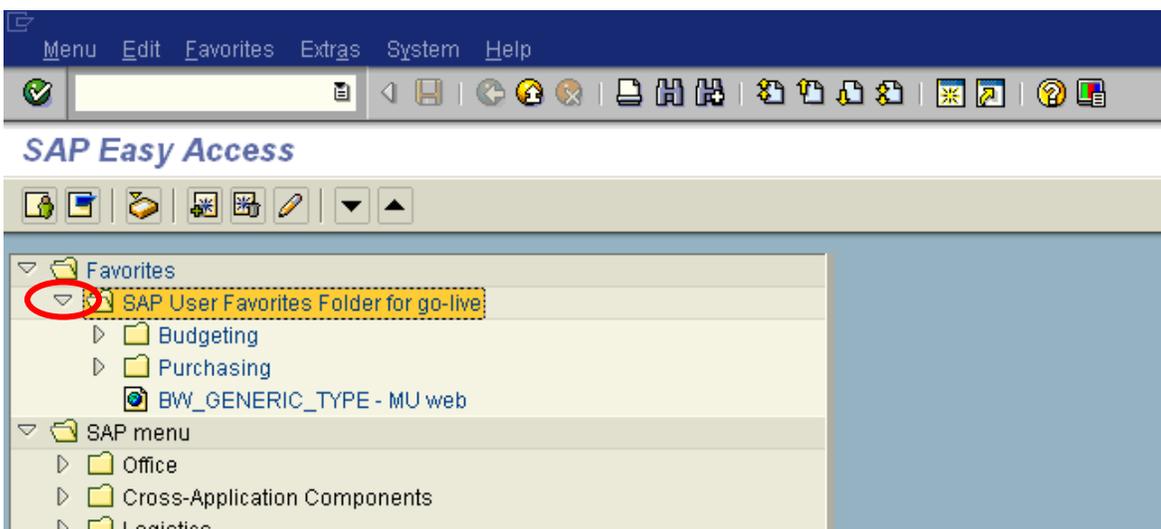
**NOTE:** You will only need to complete this procedure one time.

## HOW TO EXPAND THE SAP USER FAVORITES FOLDER MENU PATH

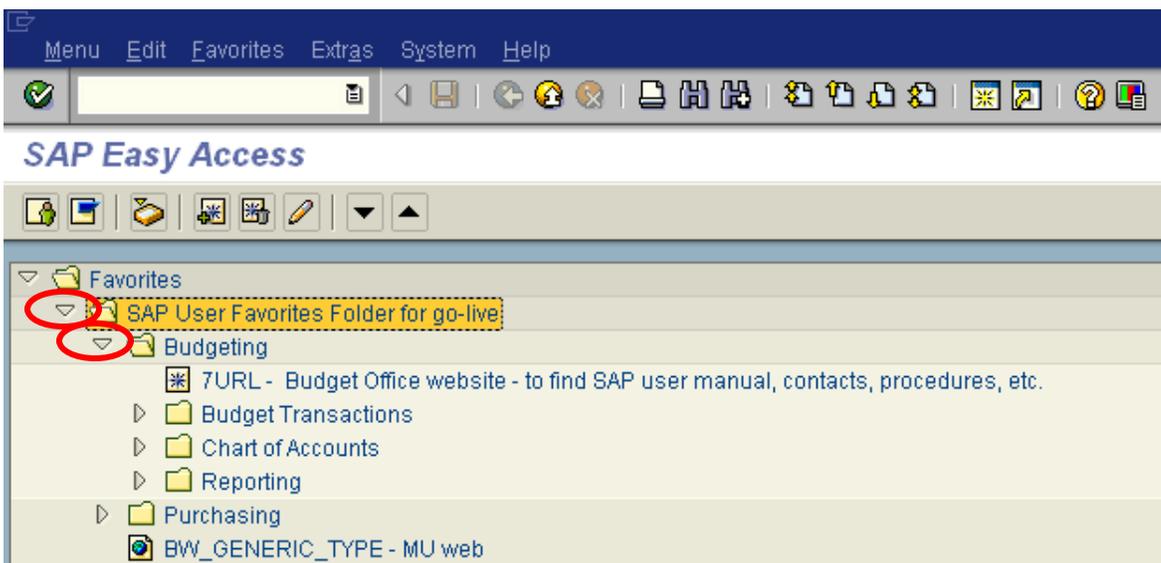
When you logon to the SAP system, you will only be able to see a few choices, as shown on the screen below. In order to reach a specific transaction, such as pre-posting a budget transfer or processing a budget report, you will need to drill down to the lowest level.

Expanding the menu path one level is achieved by clicking once on a right-pointing arrow. On the following screen SAP User Favorites Folder for go-live has been highlighted because that is the area where the menu path must be expanded in order to reach the park budget transfer entry screen.

- Click on the arrow next to *SAP User Favorites Folder for go-live*



The following window shows the screen that will be displayed after expanding the menu path two levels (by clicking on the right pointing arrow twice), when starting from *SAP User Favorites Folder for go-live*:



Each transaction can have multiple levels. The lowest level is indicated by the symbol shown below:



- Expand the menu path further; by clicking on each down arrow until you reach the lowest level (highlighted by the red circle).

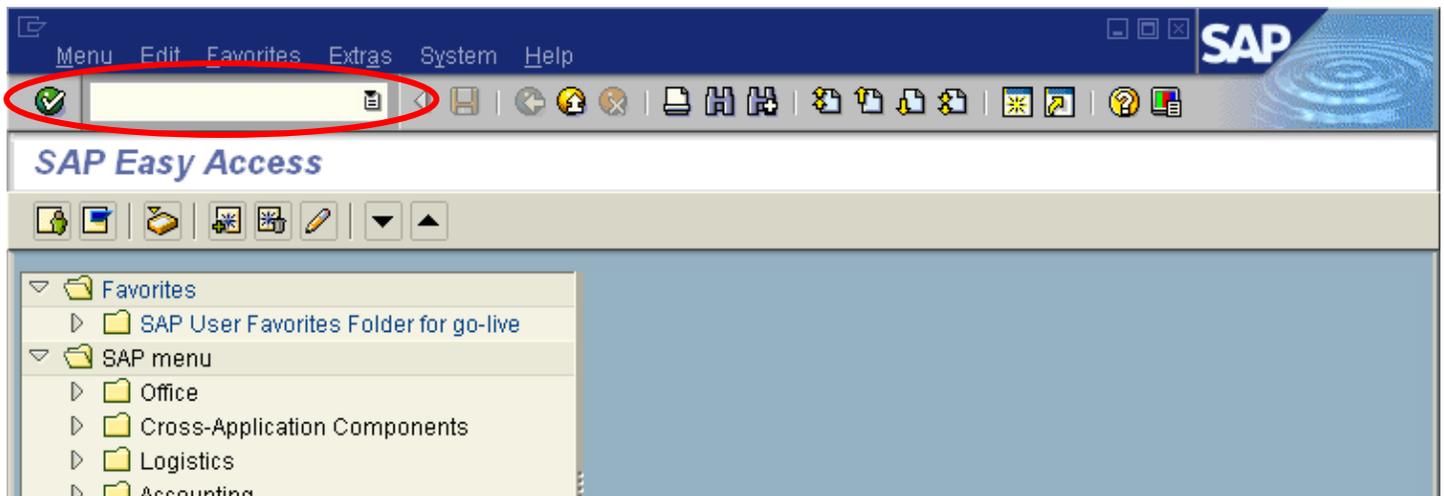
The lowest level in this case is transaction ZFM01 – Running a Budget Report.



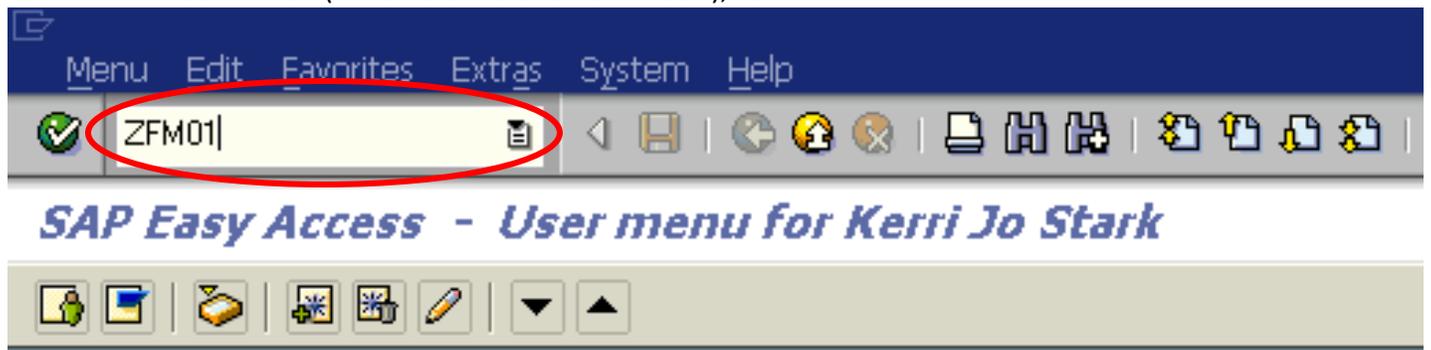
## HOW TO ENTER A TRANSACTION CODE

A transaction code is a faster way that can be used to reach a transaction screen without using a menu path. It is typically a four digit, alphanumeric value that identifies a “transaction”, such as ZBUDSTAT\_ NOCF, which is used for running budget reports.

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

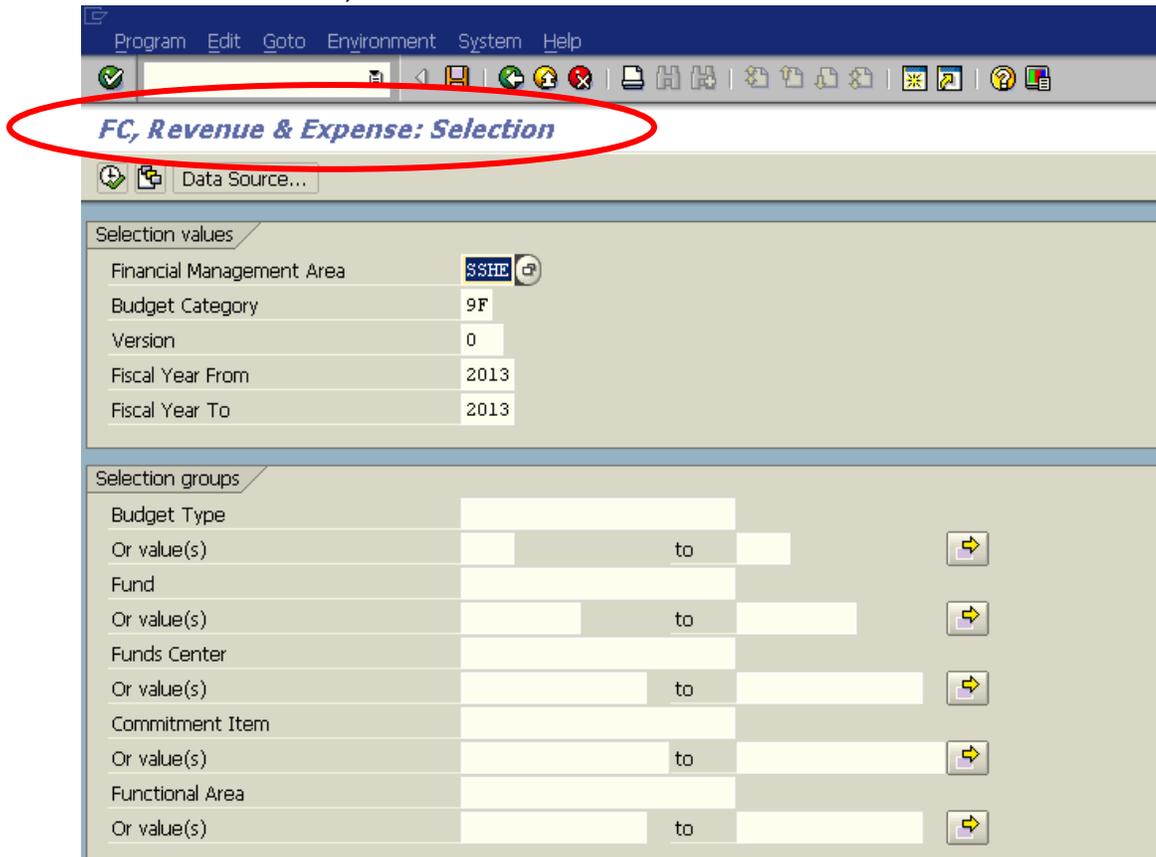


- Enter ZFM01 (which is the transaction code), as shown below:



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

- ❑ Click on the green check mark  (highlighted by the smaller red circle) or press enter. This will lead you to the *FC, Revenue, Expense: Selection...* screen, which corresponds to the ZFM01 transaction code, as shown below:



## CREATING A FAVORITE

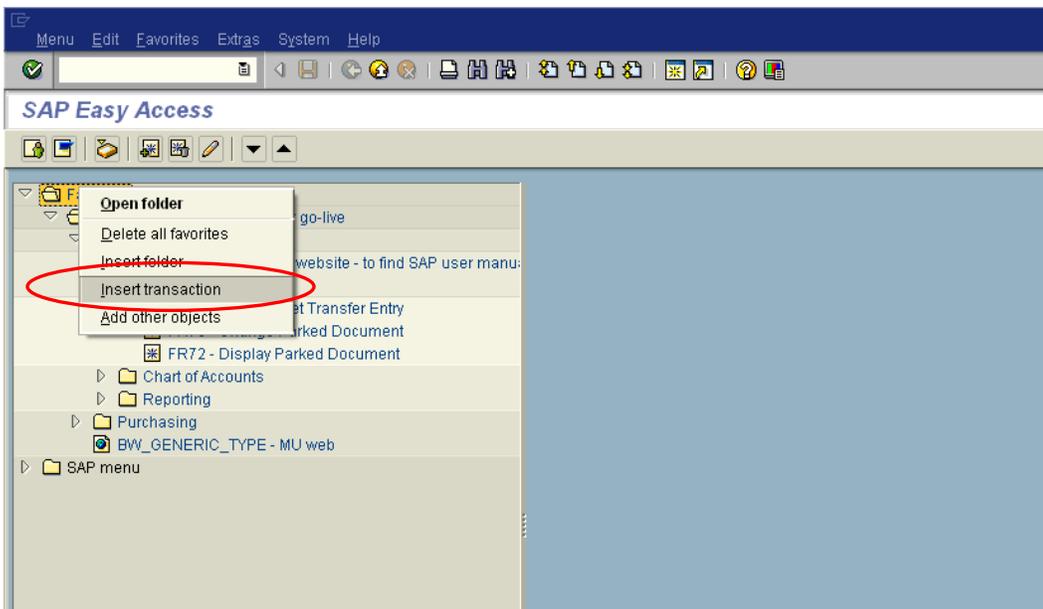
You have now seen how to drill down to get to a transaction screen. You would not want to go through all those steps each time you needed a transaction. You have also seen how to get to a transaction by entering the transaction code. Who can remember all the technical names for each transaction? Let's take a look at creating a favorite!

A favorite is just like a bookmark in a Browser, which enables you to reach a transaction without using a menu path or typing in a transaction code. You can add multiple, frequently used, transactions to your list of favorites so that you can reach your destination quickly without having to remember either the menu path or the transaction code. The Budget Office has created a favorite menu for you based on the most commonly used transactions. Should you need to create your own, follow the following steps:

To add a favorite:

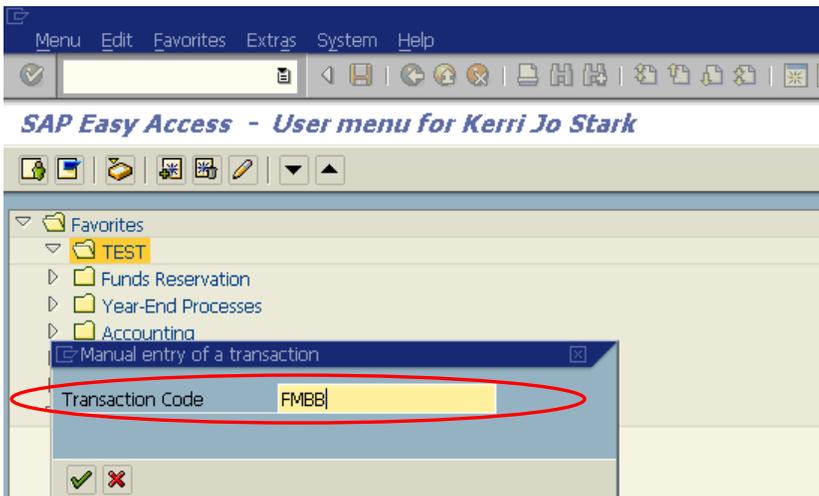
- ❑ Find a transaction code that is used frequently, such as FR69 – Park Budget Transfer Entry.

On the following screen, the Favorites folder has been highlighted. To add a transaction code to the list of favorites, complete the following:

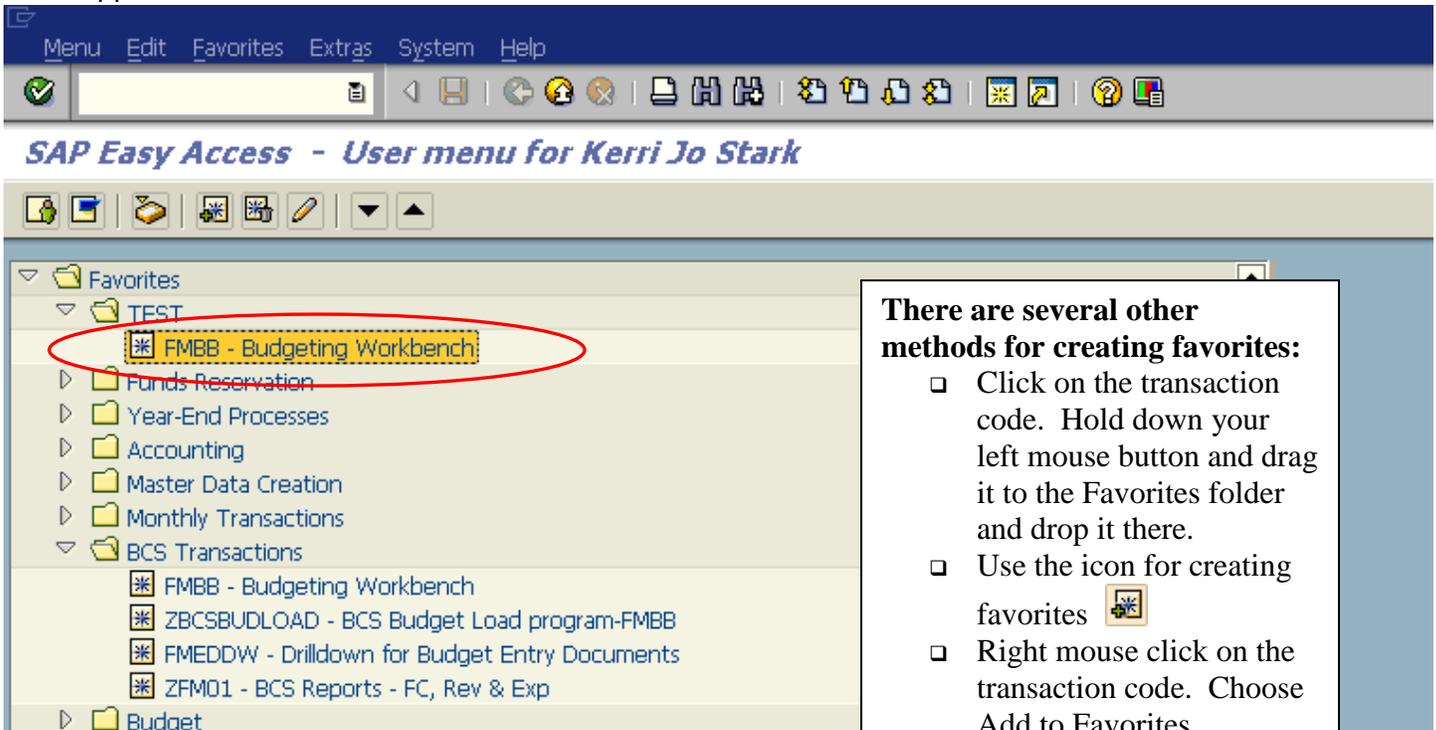


- ❑ Right Click on the *Favorites* folder
- ❑ Click on *Insert Transaction*

- ❑ Type in the transaction code that you would like to save in your favorites. For example, the transaction FMBB will allow you to pre-post budget transfers:



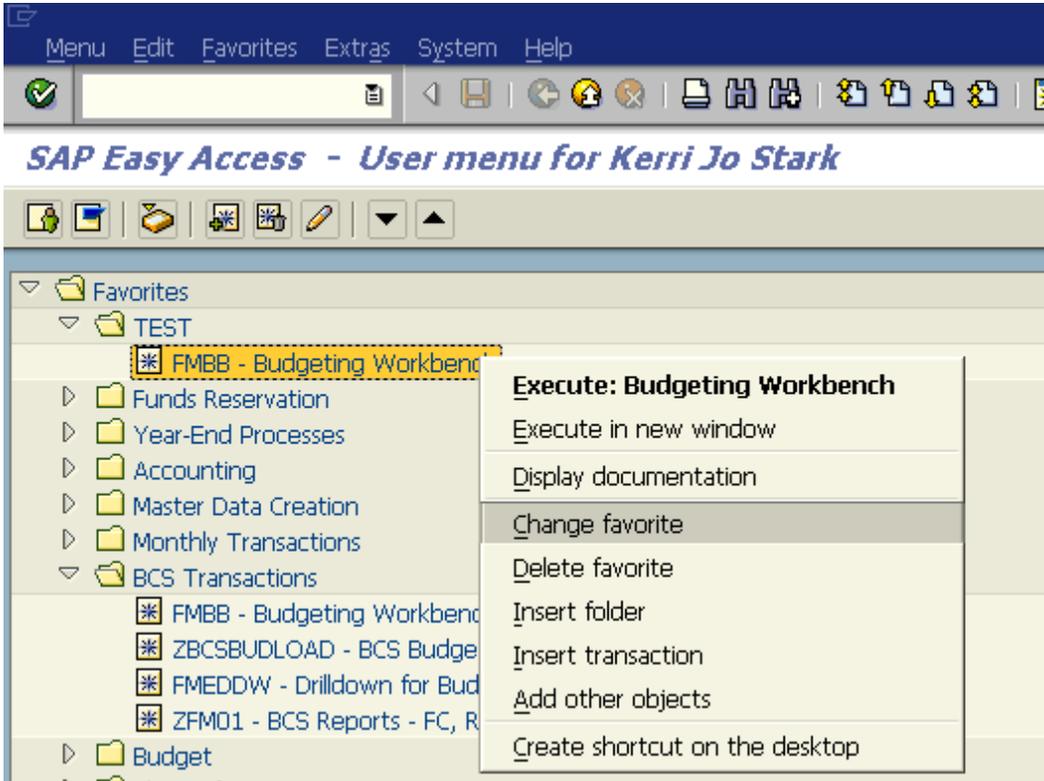
It will appear under the Favorites folder as shown below:



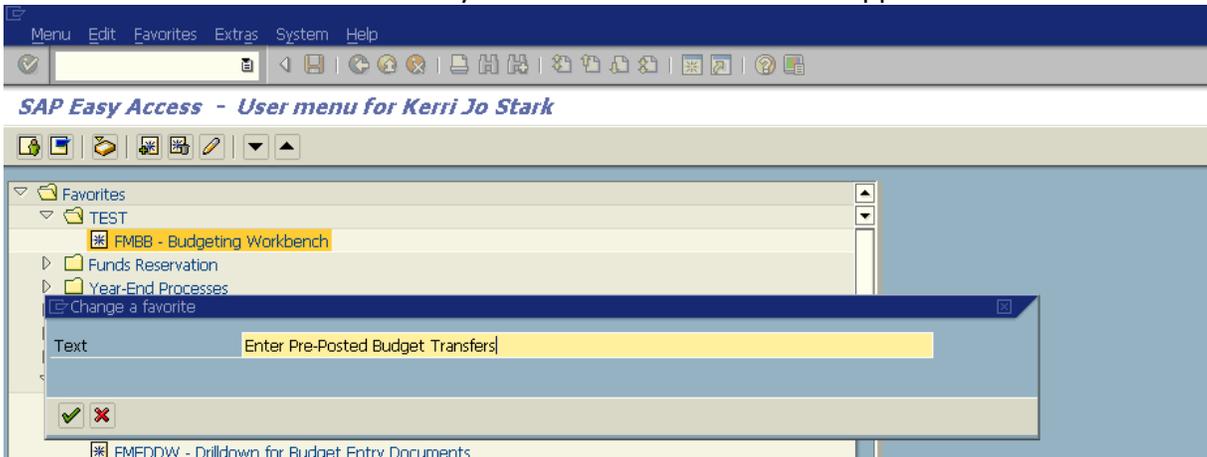
## Customizing Your Favorites

You can change the name of a Favorite by right mouse clicking on it.

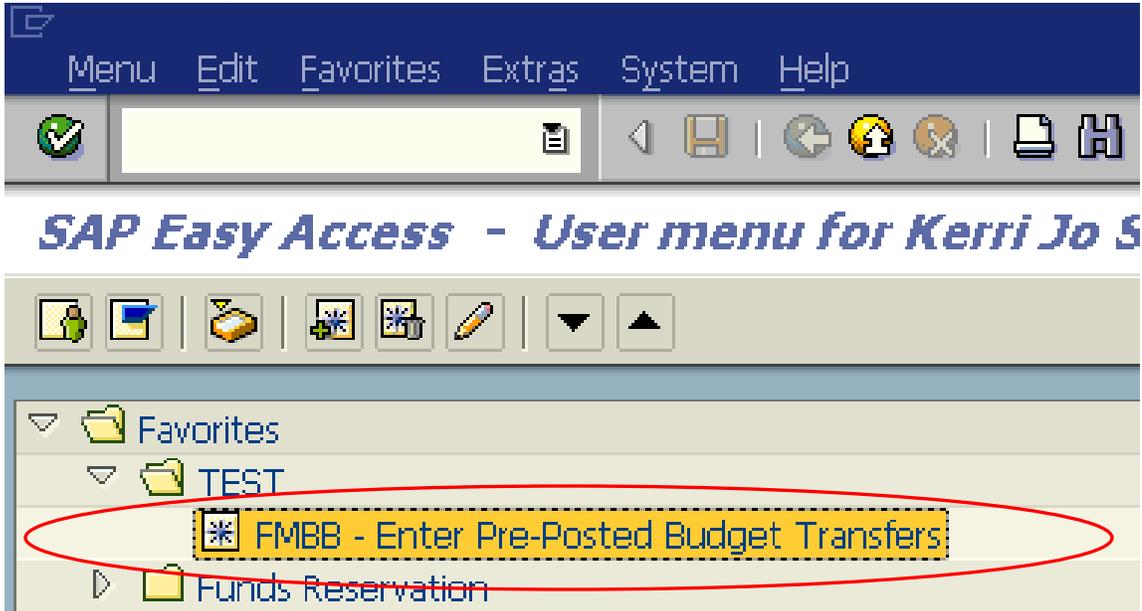
- Choose the function “Change Favorite.”



- Revise the line to read how you would like the favorite to appear.



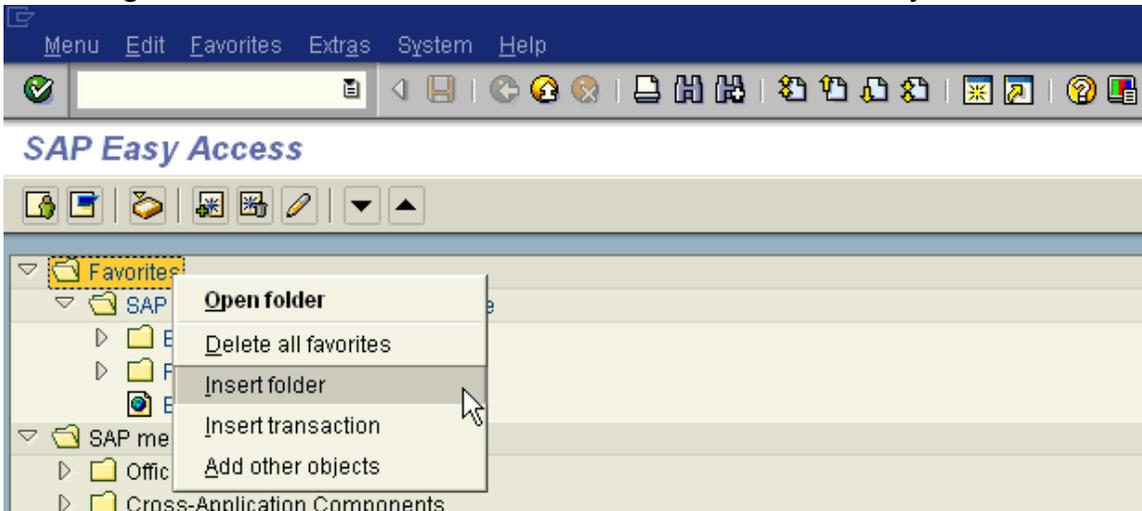
- Click the green check mark . It will appear with new name as shown below.



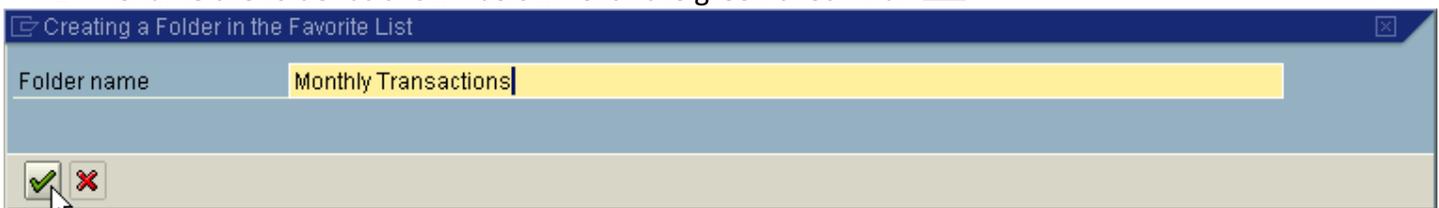
### Creating Your Own Subfolders under Favorites

You can create folders to organize your Favorites. To create a subfolder:

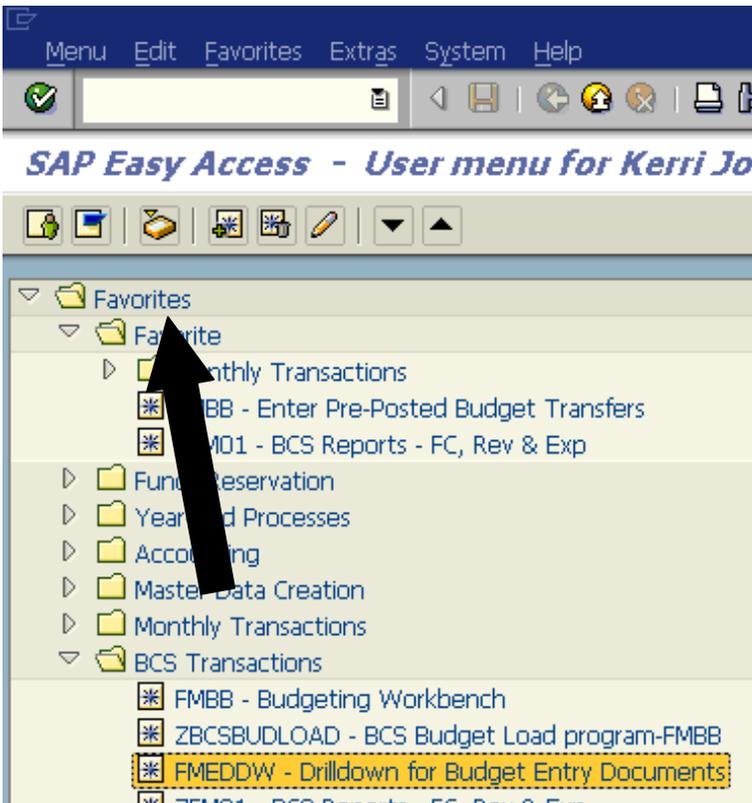
- Right mouse click on the folder called *Favorites*. Choose *Insert folder*.



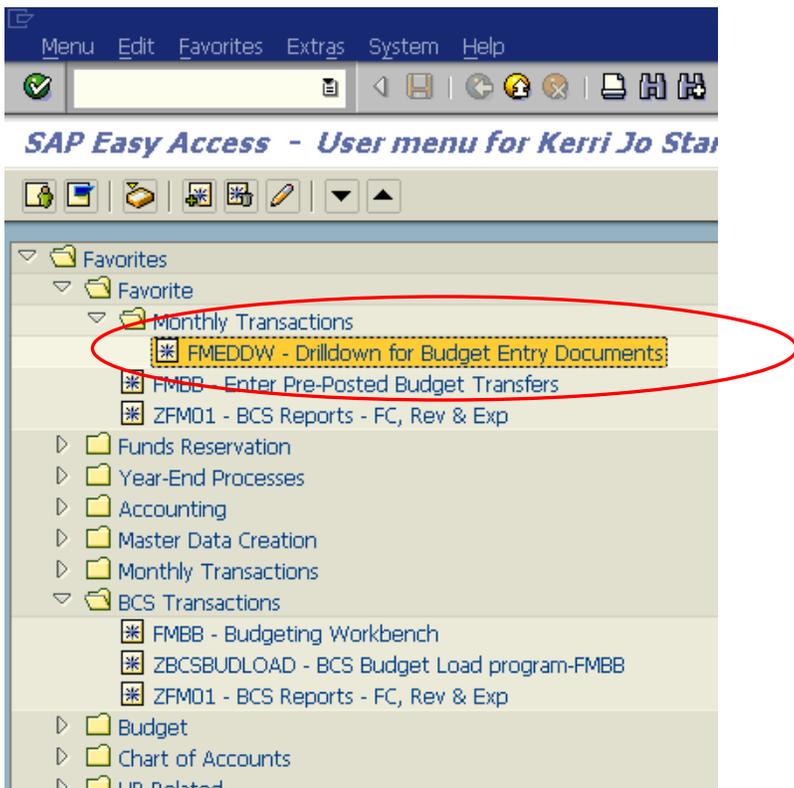
- Rename the folder as shown below. Click the green check mark .



- ❑ Create your favorites then drag and drop into your new subfolder



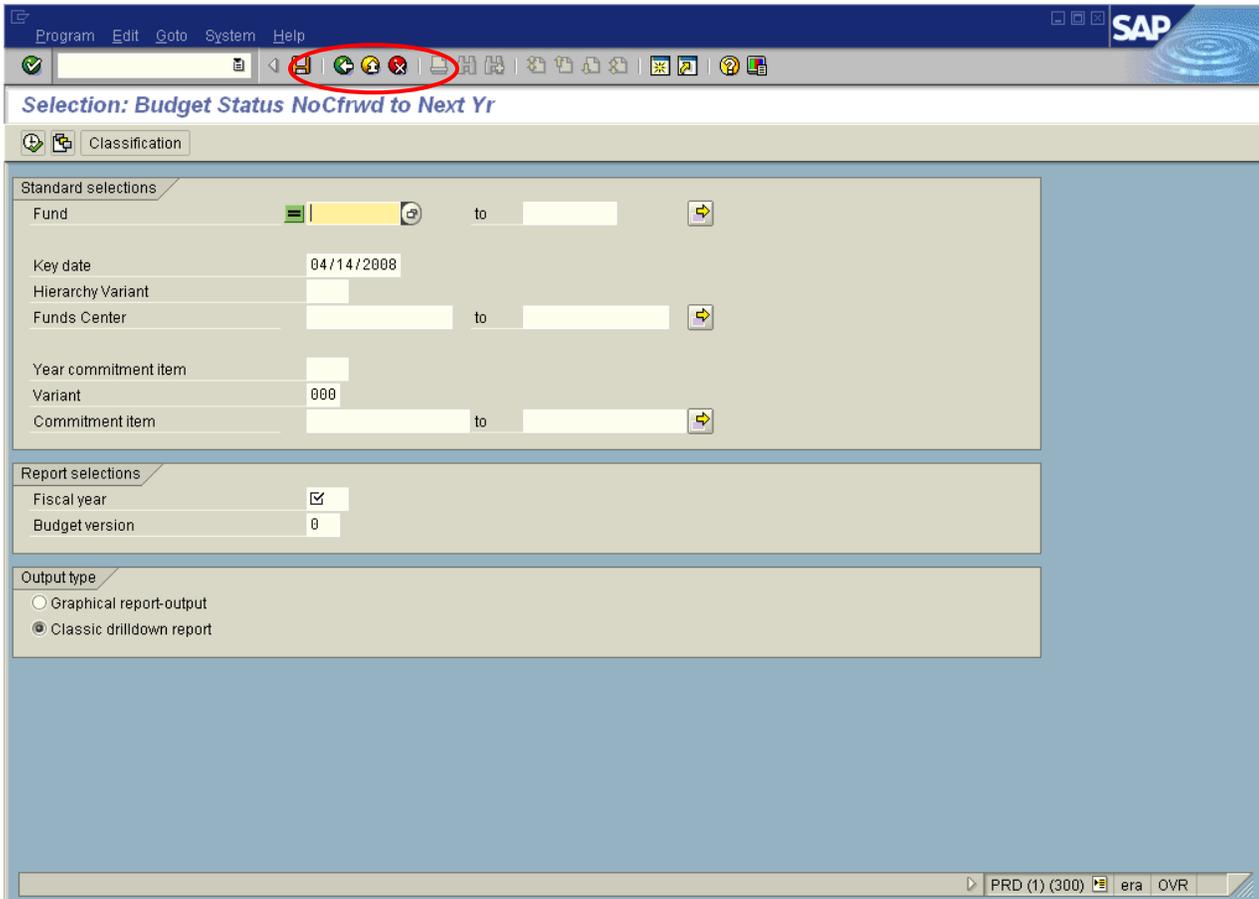
- ❑ Create your favorites then drag and drop into your new subfolder and it will appear as shown below:



## NAVIGATION SYMBOLS

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

Note that the green check mark and colored arrows are on the following screen (Green, Yellow and Red). Their functionality is explained in this section.



The following screen shot is a blown – up version of the *Standard Toolbar* shown above.



The functionality of each of these icons is explained on the following page:

### Green Check Mark



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

### Green Arrow

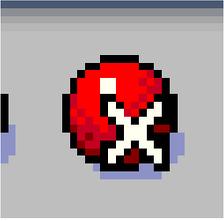


This icon is used as the **BACK** key. It is typically used to go back to the previous screen or menu level.

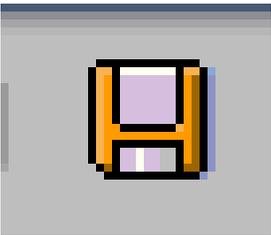
### Yellow Arrow



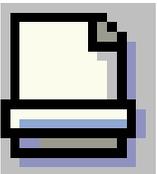
This icon is used as the **EXIT** key. It is used when you want to exit the current menu level or system task without saving the data.

**Red X**

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

**Save**

This icon is used as the **SAVE** key. It is used to save data or save changes to data in a system task.

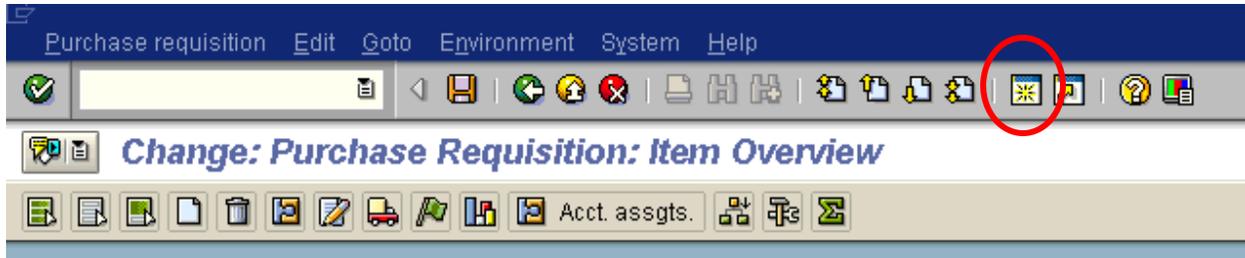
**Print**

This icon is used as the **PRINT** key.

## Creating a New Session

You can work with multiple sessions of SAP. A session is equivalent to a window. What this feature allows is to have two, or more, windows open at the same time. For example, you can use one window to work on a Budget Report. Simultaneously, you can use the other window to go to another transaction to check details of a requisition without closing the first window.

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



To create a new window:

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

You can switch between the two windows, the old and the new, by:

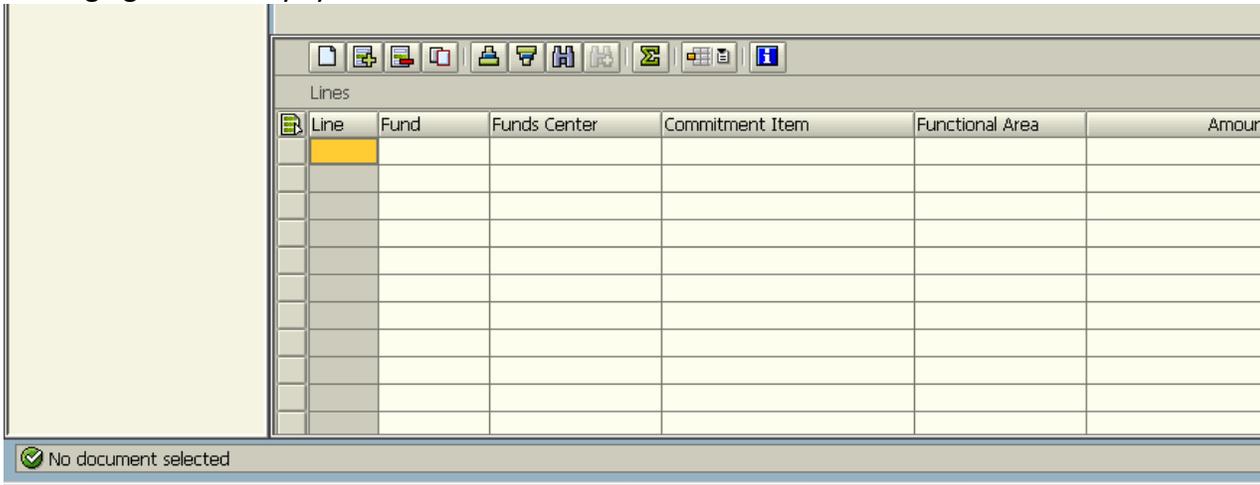
- Pressing the ALT key (and keep holding it down)
- Hitting the TAB key to move to the other window(s)



**TIP:** Maximum of seven sessions can be opened at one time

## 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 system after no document was selected in the held folder.



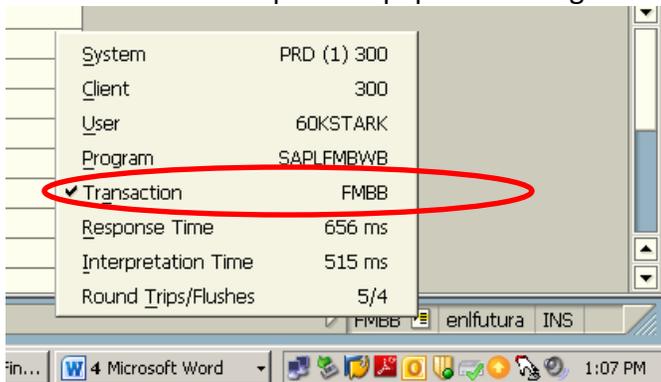
Located on the Right side of the status bar is a white arrow.



- ❑ To show more information, click on arrow – the information on the left of the notebook paper symbol can be changed by using a left click on the symbol. Choose which information you would like displayed.



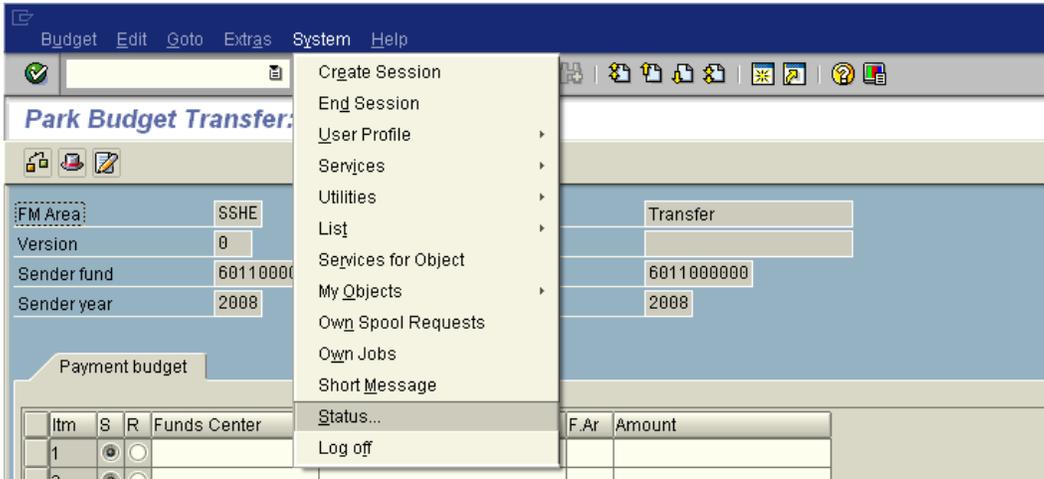
- ❑ Left click the piece of paper to the right of the transaction listed and options will show.



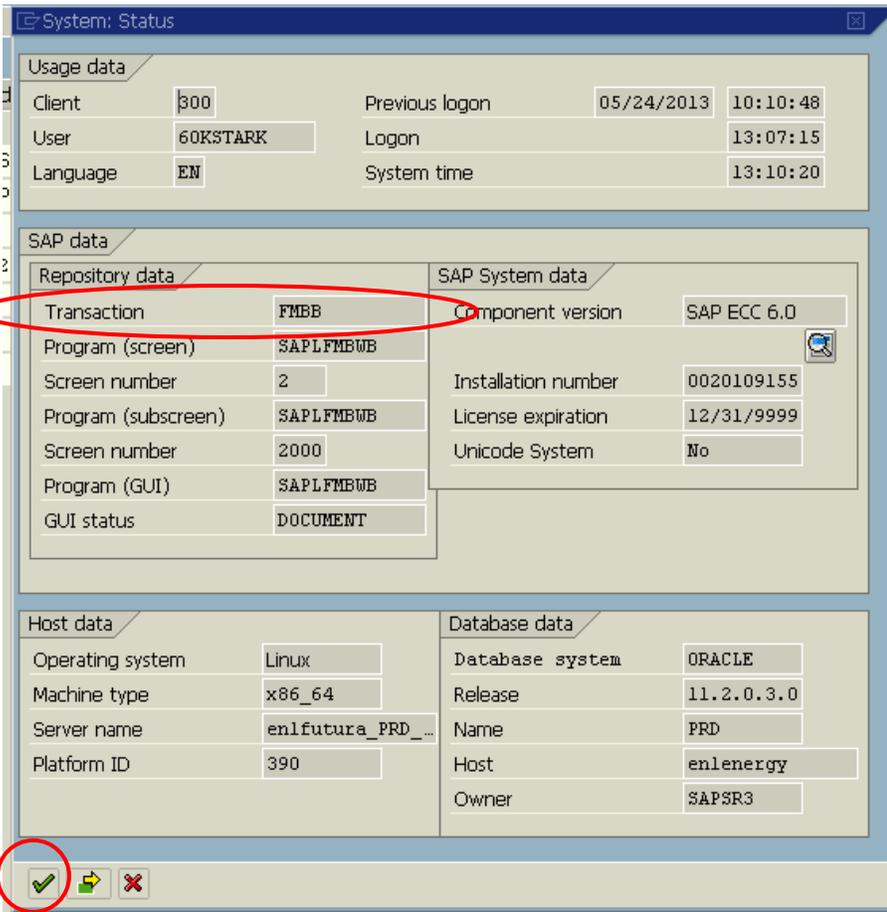
- ❑ Choose the information you would like to view (for example, the transaction code) and the result will appear after clicking on it (as shown above with FMBB).

## Determining the Current Transactions Code

If you want to find out the transaction code for the transaction that you are currently working on, as well as some other details, navigate as shown on the following screen, going to *System* then *Status*:



This will lead you to the following window showing the transaction code:

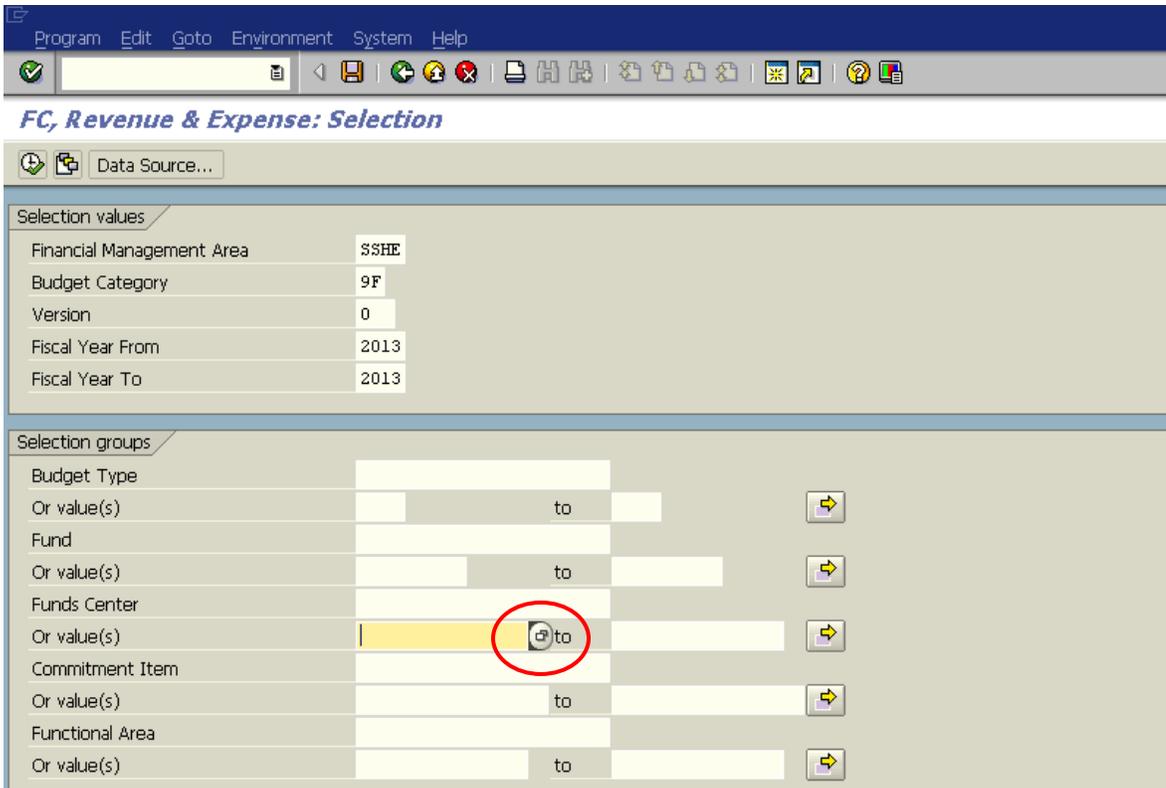


- ❑ Click on the green check mark on bottom left of dialog box to return to the previous transaction.

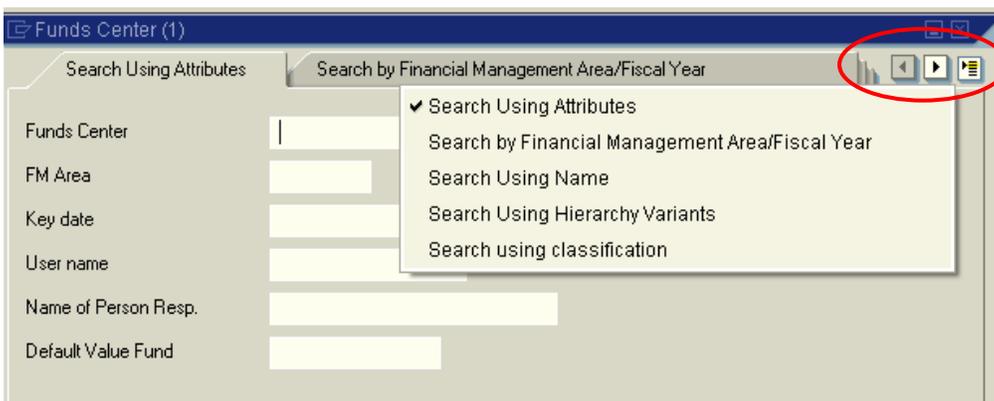
## Field Entry Searches

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

Navigate to the ZFM01 – Budget Report. In the example below, a Funds center is required. If you do not know the number, a search facility is available for this field. When your cursor is in the field, the search button will appear immediately to the right when available. See the red circle below.

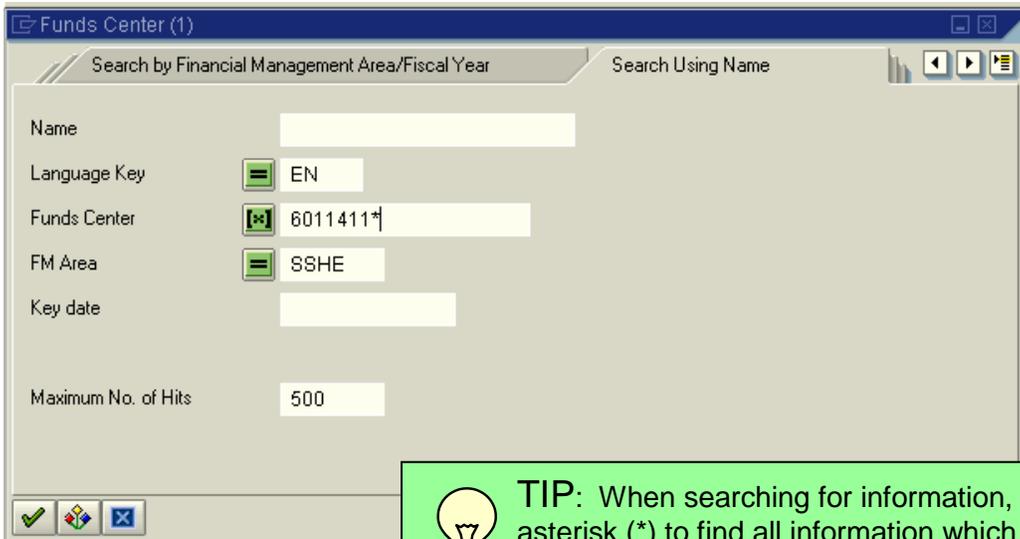


After clicking the search button (or pressing F4), a pop-up window similar to the example below, will be displayed. This window provides options for conducting your search. Often, there are several tabs available, which give different search options.



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

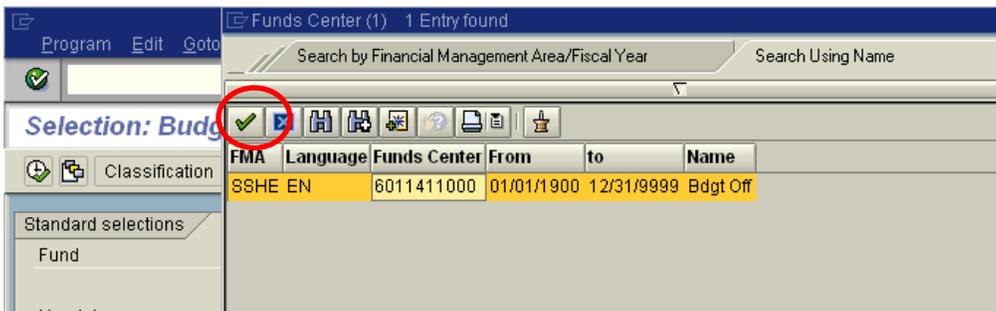
Once you have chosen the tab that corresponds to your desired search method, enter data in the fields to limit your search. You may complete all, some, or none of the fields. If no fields have been completed, the entire list of possible selections will be returned. In the example below, we are looking for the budget office.



- ❑ Click the green check mark to execute the search. To cancel and close the pop-up window click the blue X in the upper right hand corner of the dialog box.

 **TIP:** When searching for information, use an asterisk (\*) to find all information which contains the entered data. For example, above we want to find all cost centers which begin with 6011411 – this narrows a search down.

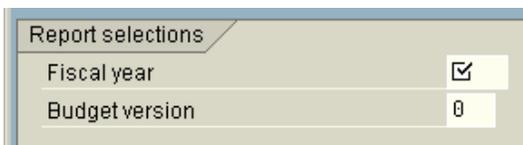
Options will appear listed in a dialog box that you can choose from as below:



- ❑ When the desired item is located, either double click or highlight and click on green check mark. To exit, click the blue X in upper right corner of dialog box.

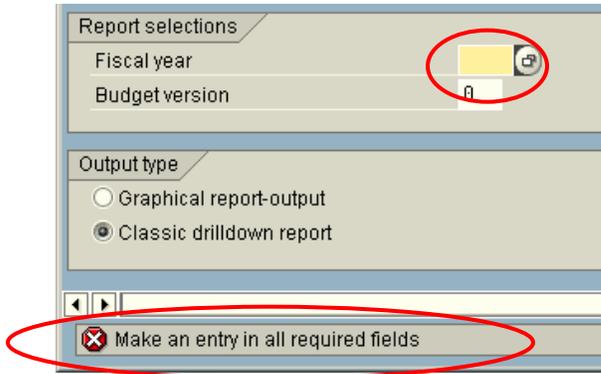
### Required Input Fields

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



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

If you have not completed all the required input fields on a screen, the SAP System displays an error message in the status bar.

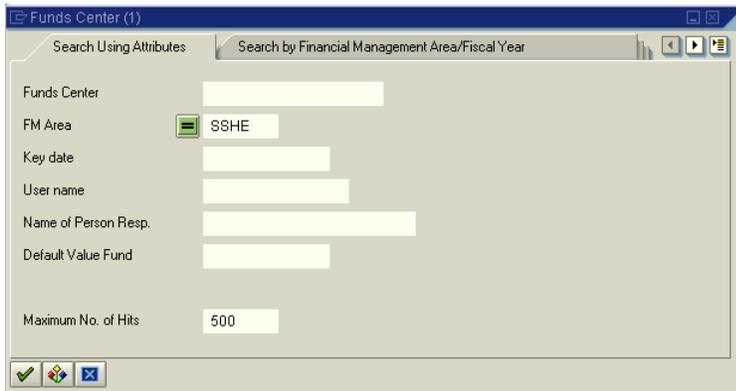


Generally, if a screen has no required input fields, you can go to the next screen or tab without entering data in any fields.

### Tabs

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

- In some cases, you must complete all required input fields on a tab page before you can move on to the next page.



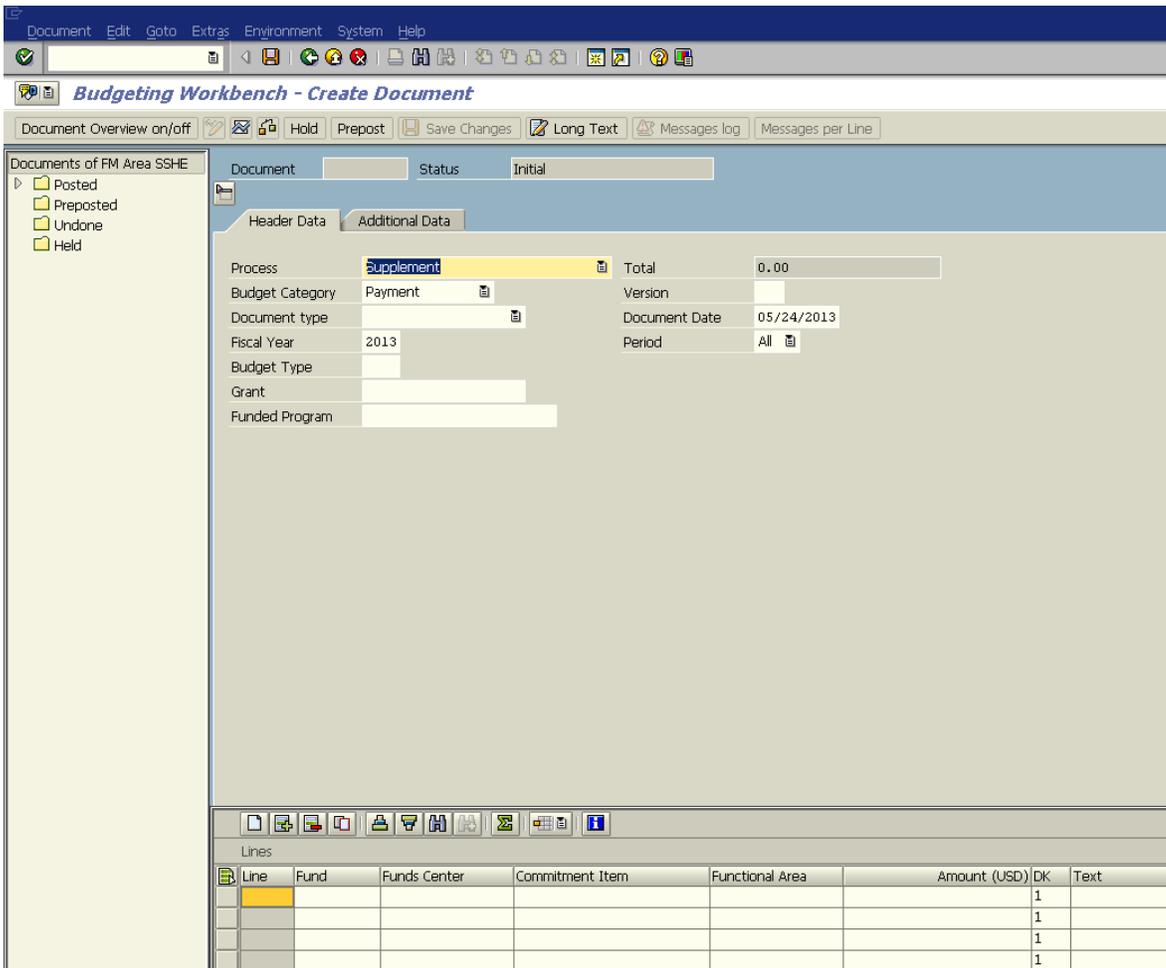
### Switching Screens Quickly

If you are finished with a transaction and need to go to another transaction, you can avoid backing out to the main menu by using a shortcut. While **in a transaction**, type `/n` plus the transaction code in the command field. Press Enter or click the green check mark icon.



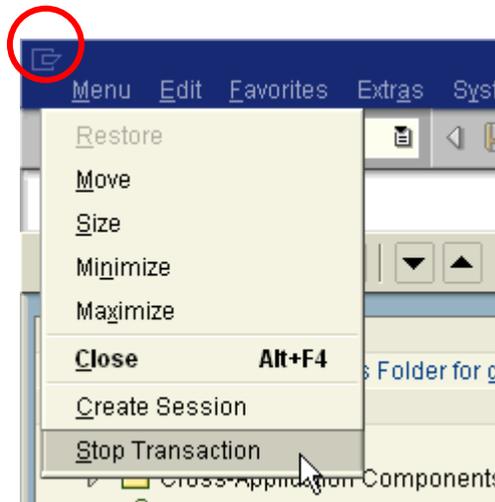
**FC. Revenue & Expense: Selection**

You will be taken directly to the new transaction. Your screen should look like the below.



### Aborting a Transaction

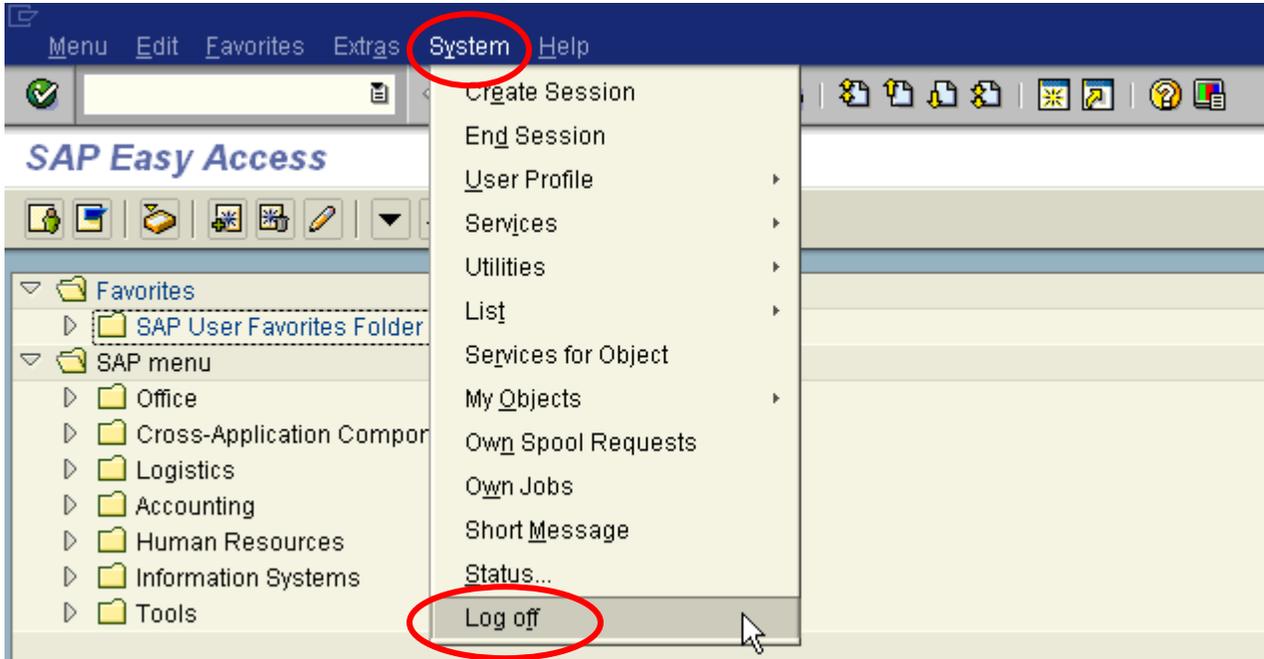
If you have entered a transaction and it seems to be taking longer than it should to return results or if you realize you forgot to enter a particular data element, you can abort the transaction. Click on the blue icon in the upper left hand corner of the screen and choose stop transaction as shown below.



## HOW TO LOGOFF

- ❑ Click on *System - Logoff*

This will display the following menu:



OR

- ❑ Click on *Yellow Arrow* 



OR

- ❑ Click on X  to close window

