

# Navigation Course

Introduction to Navigation in SAP Solutions and Products

**Product**

All

**Level**

Undergraduate  
Beginner

**Focus**

SAP ERP  
Navigation

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**Version**

1.0

**MOTIVATION**

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

On completion of the course, students will be able to navigate through the user interface to deal with business processes and case studies.

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

**LEARNING METHOD**

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

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

Finally, exercises enable students to put their knowledge into practice and retain it in the long term.

## Navigation

### Logging on

**Task** Log on to the system.

**Time** 10 min

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



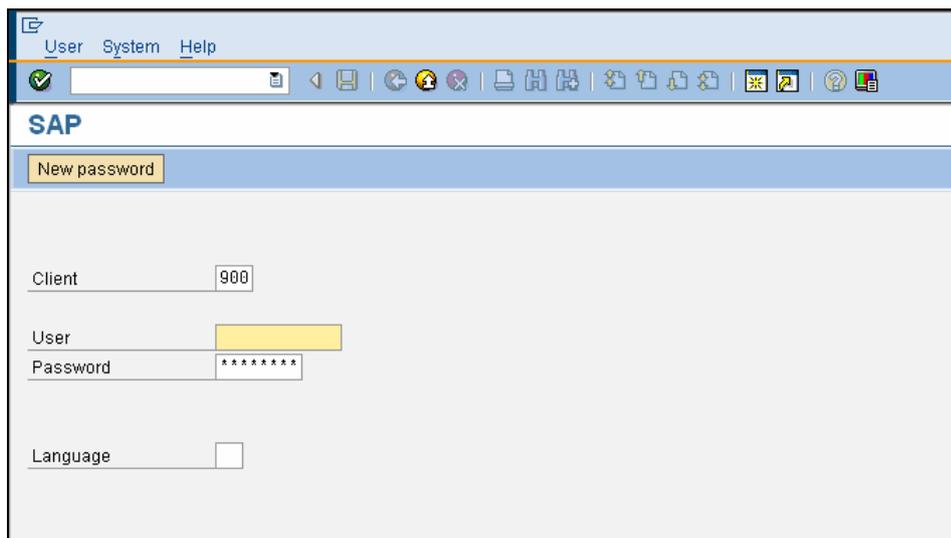
Double-click this icon on your desktop. If the icon is not there, choose *Start → All Programs → SAP Front End → SAP Logon*.

SAP Logon

A dialog box similar to the one shown on the right appears. The list of systems may be longer than in the dialog box shown here. Select the SAP system specified by your lecturer and choose *Log on* or *Enter*.



The logon screen appears. The system requests the client, your user, password, and preferred language.



Client: \_ \_ \_  
 User: \_ \_ \_ \_ \_  
 Password: \_ \_ \_ \_ \_  
 Language: \_ \_

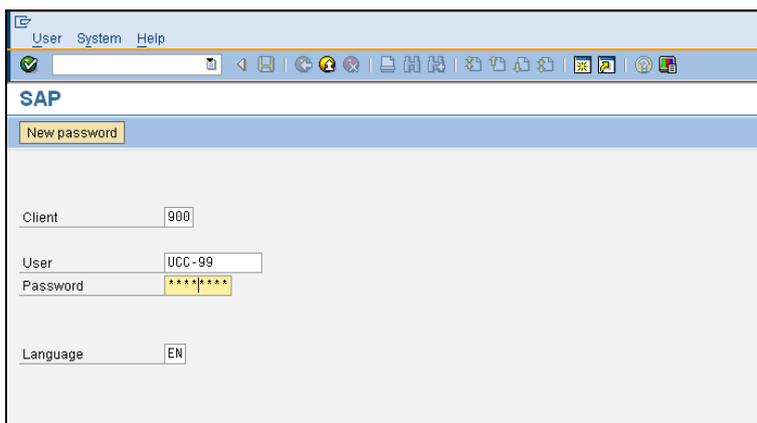
Before you log on, you need to know the definition of the term “client.”

SAP systems are client systems. With the client concept, you can manage several separate companies at the same time in one system.

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

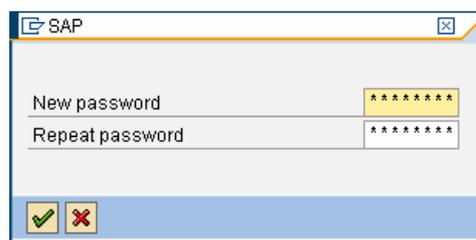
Enter the client number specified by your lecturer. For you to be able to log on as a user, a user master record must be created for you in the relevant client. For reasons of access protection, you must enter a password when you log on. Your entries here are not case-sensitive. In the example shown below, it would also be correct to enter “UCC-99.”

SAP systems are multilingual. You choose the language of your current session in the Language field. Then choose  or *Enter*.

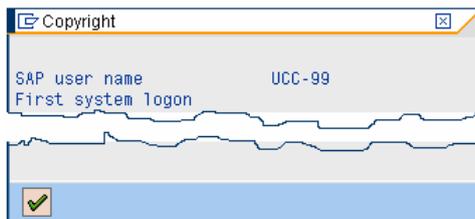


Logon screen

When you log on for the first time, the system requests you to change your password (the rules for passwords are given in the annex). To confirm your new password, choose  or *Enter*.



Password



When you log on for the first time, the copyright notice appears. Confirm it with  or *Enter*. The initial screen containing the SAP Easy Access menu appears.



## Initial Screen

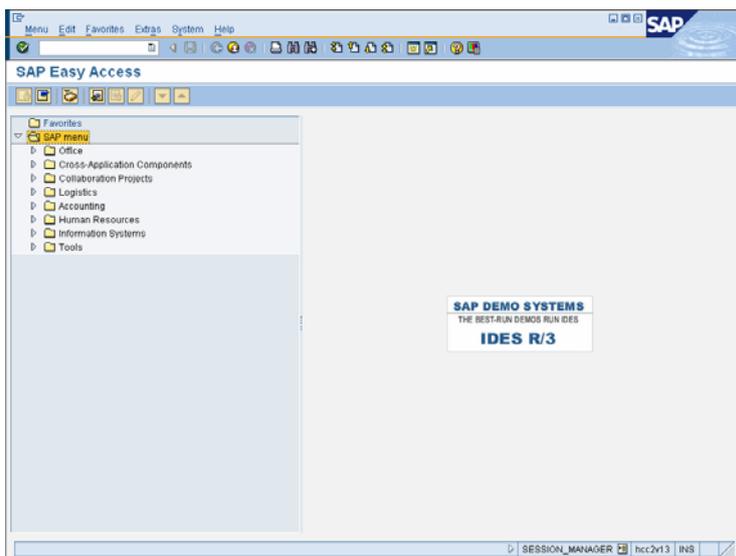
**Task** Get familiar with the SAP system screen.

**Time** 10 min

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

This is the SAP Easy Access screen as described in more detail below.

SAP Easy Access Screen



- **Menu Bar**

Menu Bar



The menus shown on the menu bar depend on the application you are using; that is, they are context-sensitive. Most menus have submenus.

- **Standard Toolbar**

Standard Toolbar



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

- **Title Bar**

Title Bar



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

- **Application Toolbar**

Application Toolbar



The application toolbar contains icons that you can use in the application that you are currently using.

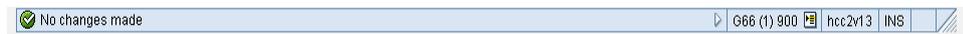
▪ SAP Easy Access Menu

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



SAP Easy Access Menu

▪ Status Bar



The status bar shows information about the current system status and warning and error messages.

Status Bar

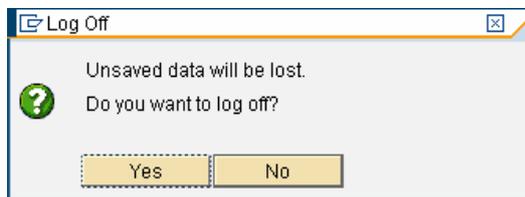
Logging off

**Task** Log off the system.

**Time** 5 min

**Short Description** Log off the SAP system.

Choose System → Log off to end the current session. The confirmation prompt shown on the right informs you that unsaved data will be lost.



Once you are certain that you have saved all entries, you can confirm the prompt by choosing Yes.

## Working with the SAP system

### Introduction

**Task** SAP terminology.

**Time** 5 min

**Short Description** Learn how to call SAP transactions and how to create and end sessions.

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

SAP terminology

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

Business scenario

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

Organizational unit

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

Master data

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

Transaction data

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

Transaction



Practical work

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

**Time** 10 min

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

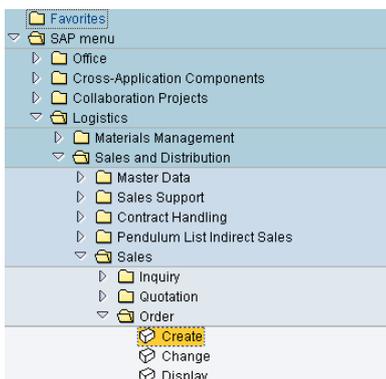
There are three ways of calling transactions in the SAP system.

Transaction concept

▪ **Easy Access Menu**

You use the tree structures of the Easy Access menu to navigate to a transaction. You then double-click the transaction to call it.

Easy Access Menu



Favorites

▪ **Favorites**

If you use a transaction frequently, you can use Drag&Drop to add it to your favorites (or choose Favorites → Add). You can then double-click it to call it without having to navigate through the SAP Easy Access menu.

▪ **Transaction Code**

Transaction code

A transaction code is assigned to each transaction (not each screen) in the SAP system. The annex starting on page 13 contains tips on displaying and finding these codes and other navigation options.

Note: The command field in which you enter the transaction code is at the top on the left and is hidden by default. Click the small arrow symbol to show it.

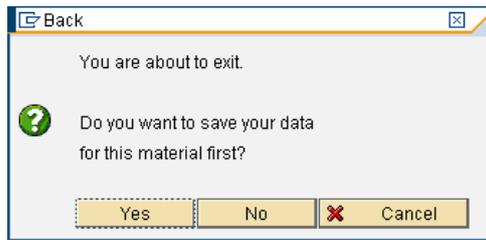


The following section describes how to navigate in transactions but does not examine the business context.

The standard toolbar contains five important icons:

 (also  )	Corresponds to the Enter key and confirms your entries
	Saves your entries on the current screen/transaction
	Corresponds to the Esc key and returns you to the previous screen
	Exits the current transaction
 (also  )	Cancels the transaction (in emergencies or if system problems occur)

When you leave a transaction by choosing , , or , this dialog box may appear. Since transactions need to be isolated, you can only end transactions by canceling them manually (without saving your entries in the database) or saving the data that you entered (corresponds to INSERT, UPDATE, or DELETE in a database).



It may be useful to work on two or more transactions at the same time. In SAP systems, you can open up to six sessions simultaneously with real parallel processing. To open a new session, choose  or System → Create Session. To close a session, choose  or System → End Session.

Session concept



## Help

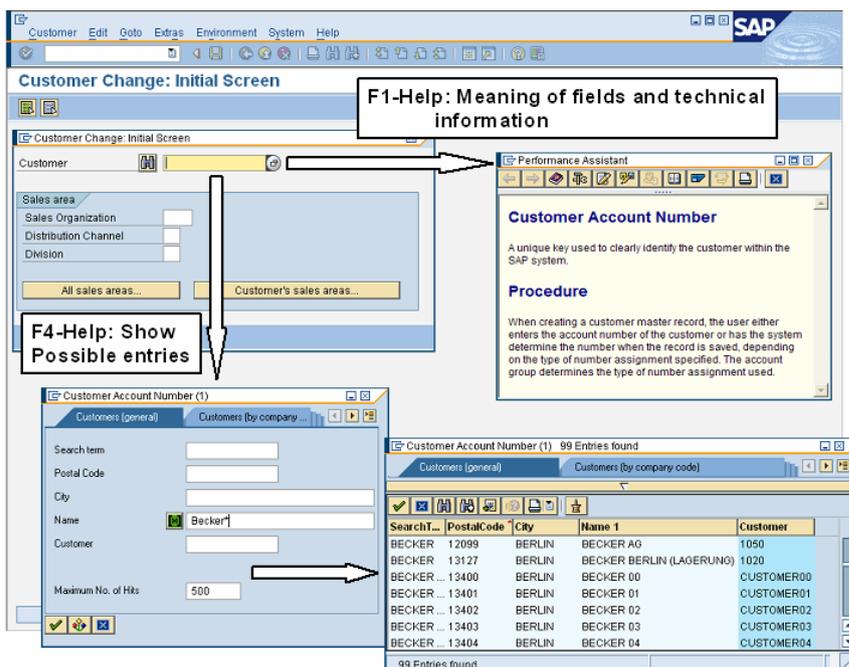
**Task** Get familiar with SAP's help functions.

**Time** 10 min

**Short Description** Use the F1 and F4 help as well as the SAP Help Portal.

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

F1 and F4 help



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

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

You can see from the F4 help search screen shown above that you can use \* for wildcard searches, enabling you search easily in string-based fields. For example, enter “Becker\*” to find all customers whose name starts with “Becker.”

The Help menu contains more help. Choose Application Help for context-sensitive help on the transaction you are currently using. Choose SAP Library to open the online SAP Library. You can also access it on the Internet at [help.sap.com](http://help.sap.com). Choose Glossary to open the extensive glossary of SAP terminology. Choose SAP Service Marketplace to open SAP’s service portals ([service.sap.com](http://service.sap.com)).

[help.sap.com](http://help.sap.com)



## Annex

### Password rules

**Task** Get familiar with SAP's password rules.

**Time** 5 min

**Short Description** Learn about password restrictions in SAP systems.

A password is a combination of characters that you enter every time you log on to an SAP system. You must memorize your password. You cannot log on to the SAP system without it.

Password rules

When creating a password, you must follow these requirements:

- Passwords are not case-sensitive.
- You must use at least three but no more than eight characters.
- You can use combinations of alphanumeric characters, including letters, numbers, spaces, and punctuation marks.
- Do not begin a password with ! or ?
- There must be no spaces in the first three characters.
- The first three characters cannot be identical.
- The sequence of the first three characters cannot be contained in your user name.
- Passwords such as DDIC, PASS, INIT, or SAP\* are not accepted.
- You can change your password at any time but only once per day.
- You cannot use any of the last five passwords you used.

Suggestion: Your user name should correspond to the first eight letters of the course name or your last name. If you have the same name as someone else, you could put a two-digit number at the end.

You can only change your password on the logon screen. To do so, proceed as described in Task *Logging on*. Enter the client number, your SAP user name, your old password, and if necessary the language. Choose  and proceed as described in Task *Logging on*. Enter your new password twice and confirm it by choosing  or Enter.



Role concept

**Task** Get familiar with SAP's role concept.

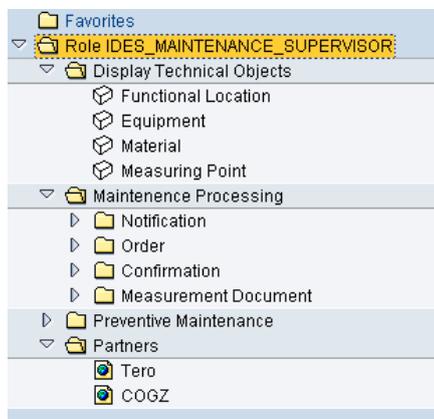
**Time** 5 min

**Short Description** Learn about the role concept in SAP systems.

**Roles** are collections of activities used in business scenarios. You access the transactions, reports, and Web-based applications for your role from your user menu. SAP systems contain a large number of predefined roles.

Roles

When a role is assigned to a user, the menu for that role appears when the user logs on to the system. The allocation of roles also ensures integrity of the business data. Authorization profiles are generated to restrict the activities of users in the SAP system, regarding the activities of the roles. On the right is an example of a menu for a maintenance supervisor. In contrast to the standard menu, the menu items Accounting and Human Resources are not present.



The role concept therefore does not just restrict rights but also results in personalized user menus.

Favorites

**Task** Get familiar with the SAP favorites folder.

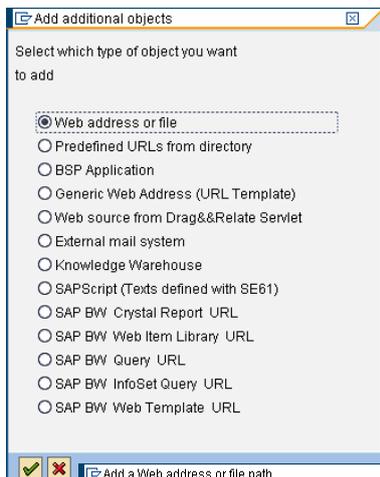
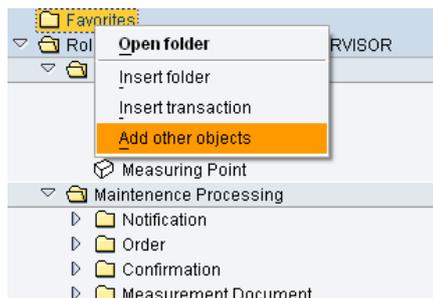
**Time** 5 min

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

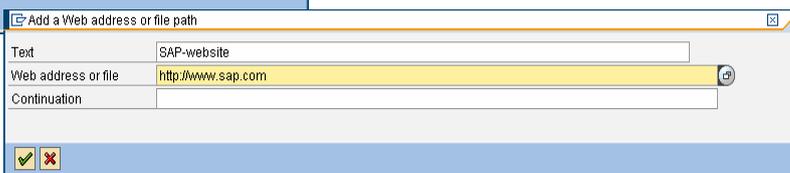
Besides adding transactions to your favorites, as described in Chapter *Practical Work*, you can add objects such as reports, files, and Web addresses. By clicking Favorites with the secondary mouse button, you can create your own folder structure.

Favorites

You can also add other objects (URL, BSP, mail system, SAPscript). You choose the applicable objects in the dialog box and enter the relevant data in the fields.



Here is an example of how to add a website to your favorites. To add the SAP AG Web site to your favorites, click Favorites with the secondary mouse button. Choose Add Other Objects then Web Address or File. In the dialog box, enter a name and the URL. To confirm, choose ✓.



### Transaction codes

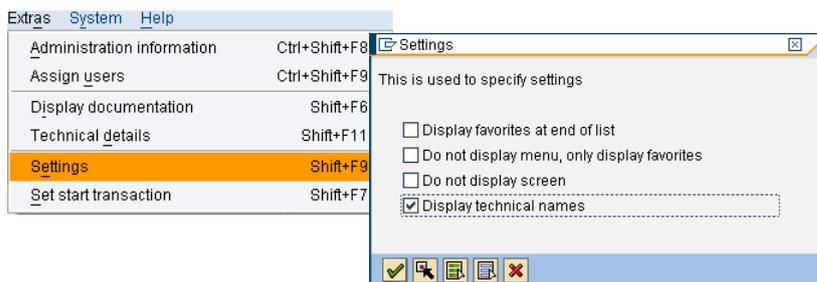
**Task** Get familiar with the SAP transaction codes.

**Time** 5 min

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

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

Transaction codes



If you know the code for a transaction, you can enter it in the command field. Choose Enter: The initial screen of the transaction appears.

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



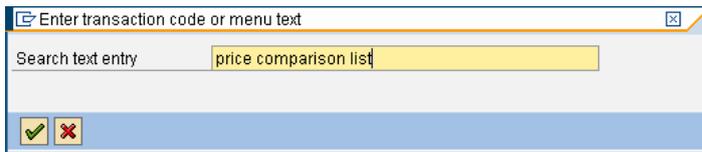
/n	Exits the current transaction
/i	Closes the current session
/o	Opens a new session

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

You can also search for transactions in the SAP system using transaction **SEARCH\_SAP\_MENU**.



SEARCH\_SAP\_MENU



Node	Transaction code	Text
Nodes	ME49	Price Comparison List
Preceding node		RFQs / Quotations
Preceding node		Purchasing
Preceding node		Materials Management
Preceding node		General Report Selection
Preceding node		Information Systems



## Exercises

After completing these exercises you will be able to:

- Log on to an SAP system
- Identify transaction codes
- Access information in the SAP Library
- Use F1 and F4 help
- Make various user-defined settings
- Maintain your favorites

## Learning Objectives

*All menu paths in the exercise are based on the standard SAP menu.*

### 1. Logging on to the system

Open the system used for this training course. Use the client, user name, initial password, and logon language below as provided by your course instructor. When you log on for the first time, a dialog box appears in which you enter the new password that you have chosen twice.

SAP Logon

Client: \_\_\_\_ User: \_\_\_\_-## Password: \_\_\_\_\_

### 2. User-defined settings

- Extras → Settings: Select *Display Technical Names*.
- Choose  on the standard toolbar (far right).
- Choose Options. On the Options tab, select *Dialog Box at Success Message* and *Dialog Box at Warning Message*.
- In the status bar at the bottom, choose  and select *Transaction*.

Settings

### 3. Sessions

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

Sessions

Number: \_\_\_\_

Close all but two sessions.

## 4. Transactions

What are the names of the transactions that you reach from the standard SAP menu and what are the transaction codes for calling them?

Transactions

*Tools → Administration → Monitor → System Monitoring → User Overview*

Transaction name: \_\_\_\_\_

Transaction code: \_\_\_\_\_

*Accounting → Financial Accounting → Accounts Receivable → Master Records → Display*

Select customer **Heartland Bike Company** in company code **00A1** and confirm by choosing Enter or .

Transaction name: \_\_\_\_\_

Transaction code: \_\_\_\_\_

What transactions do you call with the following transaction codes?

VA01: \_\_\_\_\_

MMR1: \_\_\_\_\_

ME01: \_\_\_\_\_

MM02: \_\_\_\_\_

## 5. Favorites

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

Favorites

To create favorites, find particular applications (transactions) in the Easy Access menu that you need to deal with case studies. Select an application and choose Favorites → Add to add entries to your favorites list. You can also move them (Favorites → Move). Moreover, you can add and move favorites using Drag&Drop.

Add the following transactions to your favorites.

**MMR1** – Menu path for creating a raw material:

**Logistics → Materials Management → Material Master → Material → Create (Special) → Raw Material**

**MM03** – Menu path for creating a material:

**Logistics → Materials Management → Material Master → Material → Display → Display Current**

To add URLs, click Favorites in the SAP menu with the secondary mouse button and choose Add Other Objects. Choose Web Address or File and confirm by choosing Enter.

Create a link to the SAP UCC website:

[www.sap-ucc.com](http://www.sap-ucc.com)

## 6. Help functions

### F1 Help

F1 help

Call transaction VA01 and click in the *Sales Organization* field. Choose the F1 help.

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

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### F4 Help

F4 help

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

	SOrg	DChl	Name
1.	_____		
2.	_____		
3.	_____		

## 7. Parameter settings

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

In a second session, choose *Logistics* → *Materials Management* → *Inventory Management* → *Goods Movement* → *Goods Issue*.

On the Enter Goods Issue: Initial Screen, click in the Plant field and choose F1. The Performance Assistant opens. Choose  with the quick info text Technical Information. Read the parameter ID given in the Technical Info screen.

Switch to the first session.

Enter the parameter ID and the associated plant, e.g. **00A1**. Confirm by choosing Enter. Do not leave the screen.

Repeat the procedure described for the Storage Location field, e.g. **10**.

## Solutions

### 1. Logging on to the system

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

### 2. User-defined settings

Make the user-defined settings.

### 3. Sessions

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

Depending on the system settings, you can open a maximum of **six** sessions per user session.

### 4. Transactions

Transaction code: SM04

Screen: User List

Transaction code: FD03

Screen: Display Customer: General Data

Transaction code: VA01

Screen: Create Sales Order: Initial Screen

Transaction code: MMR1

Screen: Create Raw Material: Initial Screen

Transaction code: ME01

Screen: Maintain Source List: Initial Screen

Transaction code: MM02

Screen: Change Material: Initial Screen

### 5. Favorites

Choose Favorites → Insert Folder to create a folder with any name.

Add transactions MMR1 and MM03 to your favorites.

Create a link to the SAP UCC website in your favorites.

## 6. Help functions

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

<b>SOrg</b>	<b>DChl</b>	<b>Name</b>
0001	01	Distribtn Channel 01
00A1	IN	Internet
00A1	WH	Wholesale

## 7. Parameter settings

To determine the parameter IDs of the Plant and Storage Location fields, proceed as described in the exercises. Enter the parameter IDs and the associated values in the parameter list.