Navigation in SAP Systems

Introduction to Navigation in SAP solutions on the basis of SAP ERP

Product
SAP ERP
G.B.I.
Release 6.07

Level
Beginner

Focus
Navigation

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Version
2.30

Last Update
May 2014

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

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

Furthermore, this material 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 but also very complex.

The benefit of this method is that knowledge is imparted quickly. Students also acquire practical skills and competencies. Similar to a case study, this method explains a process or procedure in detail.

By using exercises at the end of each part, students can put their knowledge into practice and gain a sustainable understanding of the underlying processes.
CASE STUDY

Logging On

**Task**  Use the SAP GUI to log on to the SAP system.  

**Time**  10 Min.

Find and double-click on the icon depicted on the left side of this page that you can find on your desktop. If it is not there, choose **Start ► All Programs ► SAP Front End ► SAP Logon**

A dialog box similar to the one shown on the right appears. 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.

![SAP Logon Dialog Box](image)

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

**SAP**

<table>
<thead>
<tr>
<th>New password</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client: 200</td>
</tr>
<tr>
<td>User: gp1-222</td>
</tr>
<tr>
<td>Password: **********</td>
</tr>
<tr>
<td>Language: en</td>
</tr>
</tbody>
</table>

SAP systems are client systems. With the client concept several separate companies can be managed in one system at the same time.
**Clients** are the highest organizational level in the system. In business terms, each client can represent a group of companies, a company, or a firm – regardless of the size of the organization.

In commercial, organizational and technical terms, a client is therefore a self-contained unit with separate master records and its own set of tables. In SAP systems, different clients are identified by their client numbers.

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

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

Enter the user name, the initial password and the logon language given by your lecturer.

User: GBI-### Password: gbiinit → log on

When you log on for the first time, a dialog box appears in which you enter your new individual password twice.

Client: _ _ _
Initial Screen

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

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

Menu Bar

The displayed menus depend on the action/transaction in the SAP system except for the system and help menu. This dependency is described as context sensitive.

User specific settings

Using the command field enter transaction SU3 and switch to the Defaults tab. In this tab, general settings like Logon Language, Decimal Notation and Date Format can be determined for your user.

Please choose EN (English) for Logon Language, 1,234,567.89 for Decimal Notation and MM/DD/JJJJ as Date Format.
Save your entries using ⊞.

**Standard Toolbar**

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

**Exercise 1** For the following exercise switch to transaction VA03, to do so leave the current transaction by using ⊞.

1.1 Which meanings have the following symbols in the Standard Toolbar? (Tipp By pausing the cursor over an icon, a help text is depicted. If there is no help text for each icon you simply have to go into a transaction.)

1.2 Why is the icon ⊞ (Save) grayed out in the initial screen?

1.3 Which of the following icons can create a new session?

1.4 How many sessions can be open in the system in parallel? (Tipp Click on the corresponding icon until the system does not create another session.)

1.5 To close a session, choose the icon ⊞ in the Standard Toolbar or go to
What is the difference between the icons and ?

Title Bar
The title bar displays the name of the transaction you are currently using. It is located on every primary window and dialog window under the standard toolbar and above the application toolbar.

Application Toolbar
The application toolbar contains icons and buttons applicable to the transaction you are currently using.

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

Exercise
Open the following tree structure!
Exercise 2

2.1 What is the difference between the transactions *Display Current* and *Display at Key Date*?

- Display Current
- Display at Key Date

Status Bar

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

Task Use the options menu for user-specific settings.

Choose the button *Customize Local Layout*, click at Options.

In the open window click on Interaction Design and choose Visualization:

1. Select “Show keys within dropdown lists”.
You can choose, that success and error messages appear as a pop-up and not just in the status bar. Therefore switch to Notifications and select by Messages “Show success messages in a dialog box”, “Show warning messages in a dialog box”, “Show error messages in a dialog box”.

Choose OK to save the new settings.
CASE STUDY

Favorites

Task  Create your own favorites in SAP GUI and add objects to them.  Time 10 Min.

If you frequently use a transaction, you can use drag&drop to add it to your favorites (or choose Favorites ► Add). You can then double-click it to run it without having to navigate through the SAP Easy Access menu. Furthermore you can add folders, reports, files and web addresses as favorites.

You can add any link to your favorites, to do so click Favorites with the secondary mouse button. Choose Add other objects then Web Address or File. In the dialog box, enter a name and the URL shown below. To confirm choose ✔.

Exercise 3

Create/Expand your own favorites menu.

3.1 Add the SAP Help Portal using the URL help.sap.com.
3.2 Add the following transaction as a favorite:
   Logistics ► Sales and Distribution ► Sales ► Order ► Display
Task  Learn how to effectively make use of SAP transaction codes and parameters.

There are several possibilities to call up transactions in the SAP system.

The quickest way to run a transaction in the SAP system is to enter the transaction code. Every transaction has a code, which generally has four characters.

**SAP Easy Access Menu**

- Favorites
- SAP Menu
  - Office
  - Cross-Application Components
  - Logistics
  - Accounting
  - Human Resources
  - Information Systems
  - Tools

**Transaction Code**

Every business transaction (not every screen) has a corresponding transaction code in SAP. To display transaction codes choose Extras ▶ Settings and select *Display technical names.*
Note: the command field in which transaction codes are entered can be found on the upper left. By clicking the small triangle you set it to visible/invisible.

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

<table>
<thead>
<tr>
<th>Command</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>/n</td>
<td>Exits the current transaction</td>
</tr>
<tr>
<td>/i</td>
<td>Closes the current session</td>
</tr>
<tr>
<td>/o</td>
<td>Opens a new session</td>
</tr>
</tbody>
</table>

Exercise 4

4.1 Which business function is displayed with the transaction code VA03?

4.2 Which business function describes the menu path Logistics ► Sales and Distribution ► Master Data ► Business Partner ► Customer ► Display ► Complete?

4.3 What is the difference between the transactions VD03 and XD03?

4.4 Which business processes describe the following transaction codes?

   XK01: ____________________________
   MM02: ____________________________
   ME23N: ____________________________
When leaving a transaction using ☐, ☐ or ☒ you may be confronted with this displayed dialog window. Be sure that no unsaved data is displayed in the current session. Then choose yes.
Help

**Task**  Get familiar with help functions in SAP systems. 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 use the F4 help by choosing directly to the right of a selected field.

Further help can be found in the help menu. 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.
Exercise 5

5.1 Call up transaction **VA01** and select the field *Distribution Channel.* Press the F1-button.
What is a distribution channel (in a few keywords)?

5.2 Close the window with definition of the Distribution Channel. Stay in transaction **VA01.** Click the field *Order Type* and press F4. What do the order types **SO** and **OR** stand for?

SO ____________________________
OR ____________________________

5.3 What is the difference between these two types of orders?

______________________________________________________________
______________________________________________________________
______________________________________________________________
**Multiple Selection**

**Task**  Understand and perform multiple selection in SAP GUI and get to know useful hints about it.

Time 10 Min.

Choose transaction **MMBE** to get to the Stock Overview Screen. Display the stock from the plants in Dallas and Miami.

Please assure, that when you enter the two plants in the overview as shown below, you will not get the correct result.

As you will see in the following screen, the plant in Heidelberg was chosen as well. This is due to the fact that the SAP system displays all plants which range alphabetically between DL00 and MI00.

Therefore select the black Deluxe Touring Bike (DXTR1000) and click afterwards.

choose multiple selection

. Then choose the plants you want to display and press *Enter*. Afterwards select *Execute*. 

![Multiple selection...](image)
## Working at GBI

**Task**  Navigate through the SAP system to display the most important information of your enterprise in GBI.  

<table>
<thead>
<tr>
<th>Exercise 6</th>
</tr>
</thead>
</table>
| **6.1** How many black Deluxe Touring Bikes do you have in stock?  
   *(Tip Therefore use transaction MMBE.)* |
| **6.2** Which customers can be identified in GBI?  
   Follow the menu path: Logistics ► Sales and Distribution ► Master Data ► Business Partner ► Customer ► Display ► Complete  
   *(Hint Click on the field Customer and press F4. Then enter your Company Code (DE00).)* |
| **6.3** What is a debtor? |

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Logging Off

**Task**  Log off the SAP system.

**Time**  5 Min.

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*. 