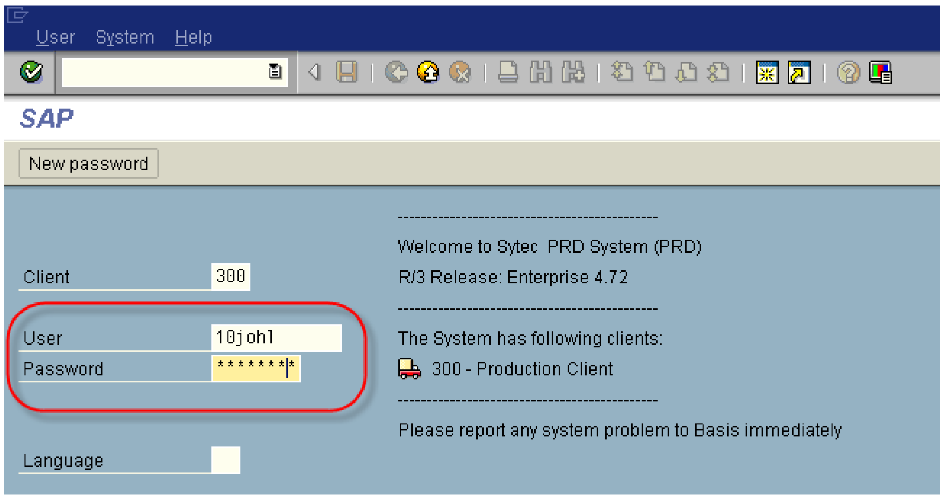
LOGGING IN AND PASSWORDS

Open the SAP software to log in.

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



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

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

Press ENTER or click on the green checkmark icon.

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

- Passwords must be a minimum of 8 characters.
- Passwords cannot begin with the first 3 digits of your logon ID (example: If I'm logging on as 10johl, I could not choose a password starting 10j).
- You will be alerted to change your password every 90 days.
- When changing your password, you cannot use the <u>last 5 passwords you used</u>. This is for security purposes.

CORRECT SETTINGS FOR YOUR SOFTWARE

SAP Menu View

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

Importing Favorites

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

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

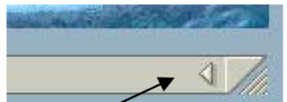
Display of Technical Names (Transaction Code Names)

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

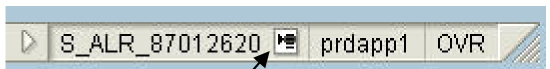
- Note: There are other settings under “Extras” such as “do not display picture” which will take the blue whirlpool picture off your main SAP window. Customize your screen as you wish.

Status Bar View (bottom right of your screen)

If your screen looks like this:



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



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

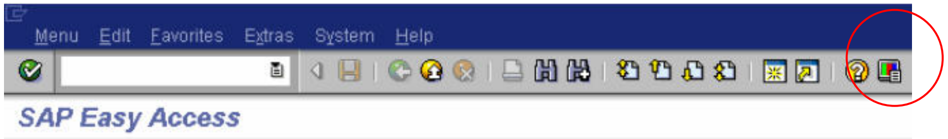
Purchase Requisitions

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

IMPORTANT SETTINGS FOR LOCAL DATA

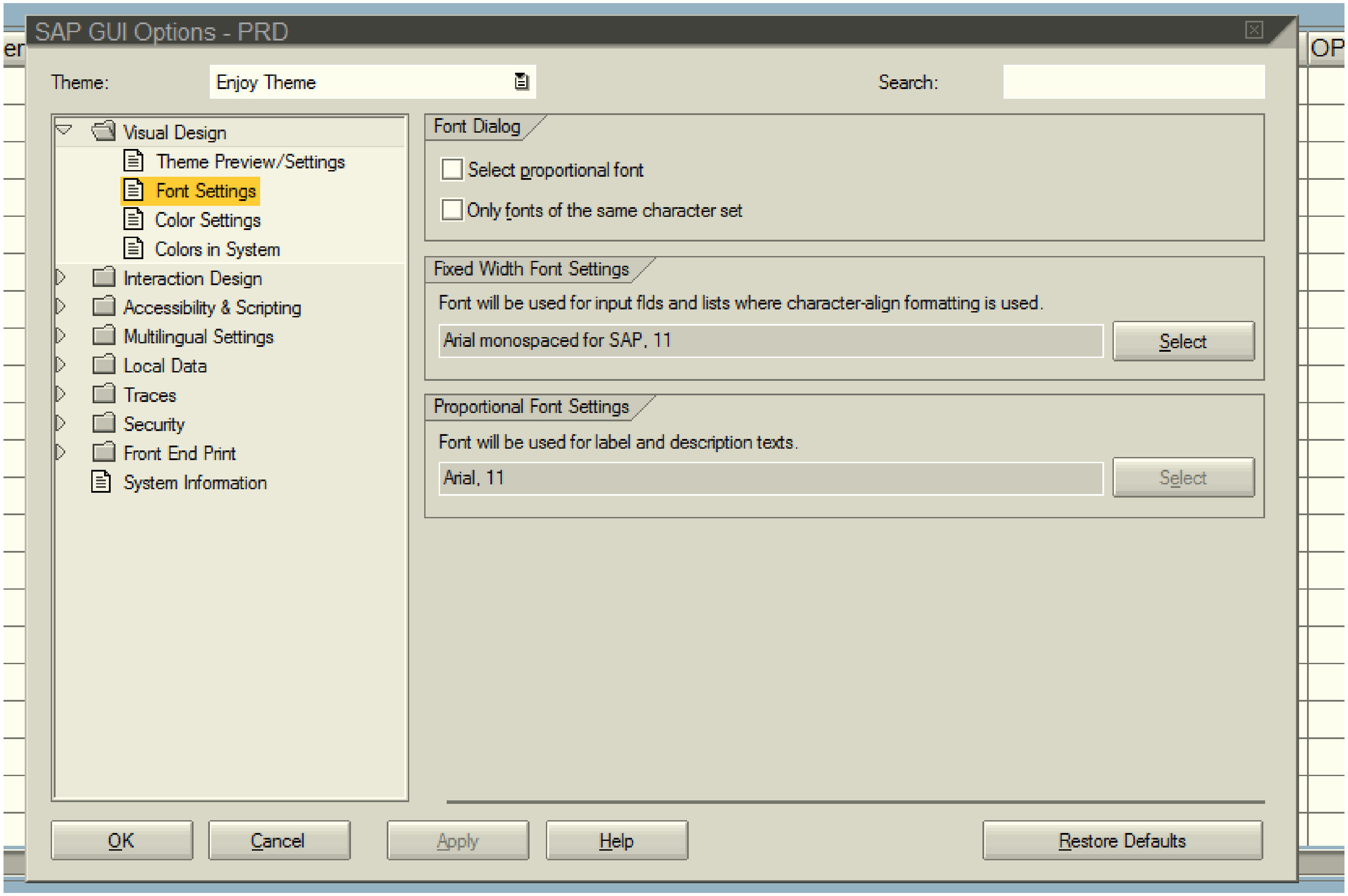
- Show history of previously entered data fields (user ID, fund center, commitment codes).
- To ensure proper settings for file sizes (very important step to do)!

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

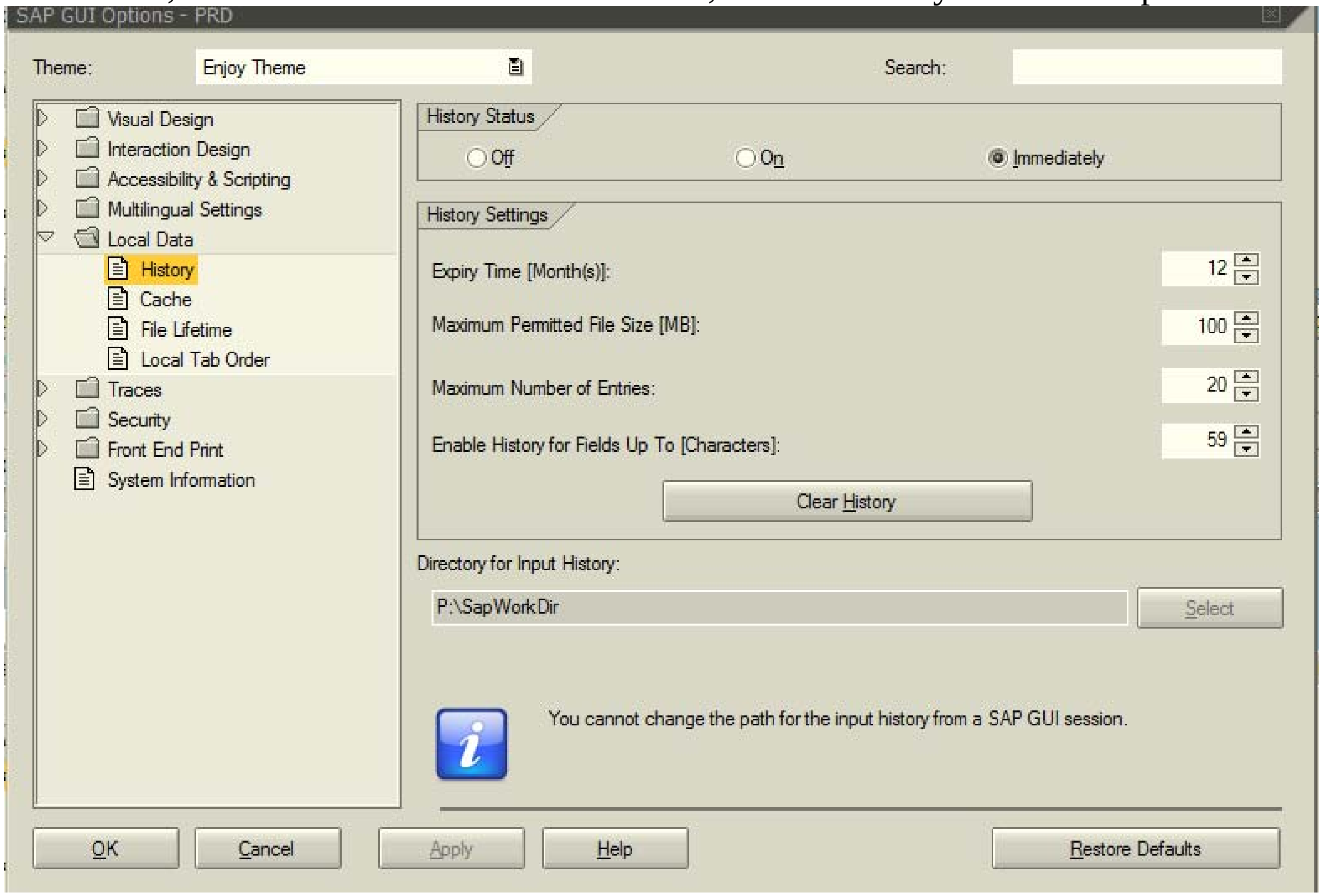


This should place you on the screen called "Options."

Under Visual Design, Font Settings - change SAP signature Theme to Enjoy Theme. You will have the color scheme that you had previously. You may also change the font under Fixed Width Font Settings if you don't like what you have. Below is the suggested font.



Under Local Data, choose History. History Status should be “Immediately”, Expiry Time “12”; Maximum Permitted File Size “100”; Maximum Number of Entries “20”; Enable History for Fields Up To “59”.



Click Apply and OK near the bottom of the screen.

PRINTER SETUP

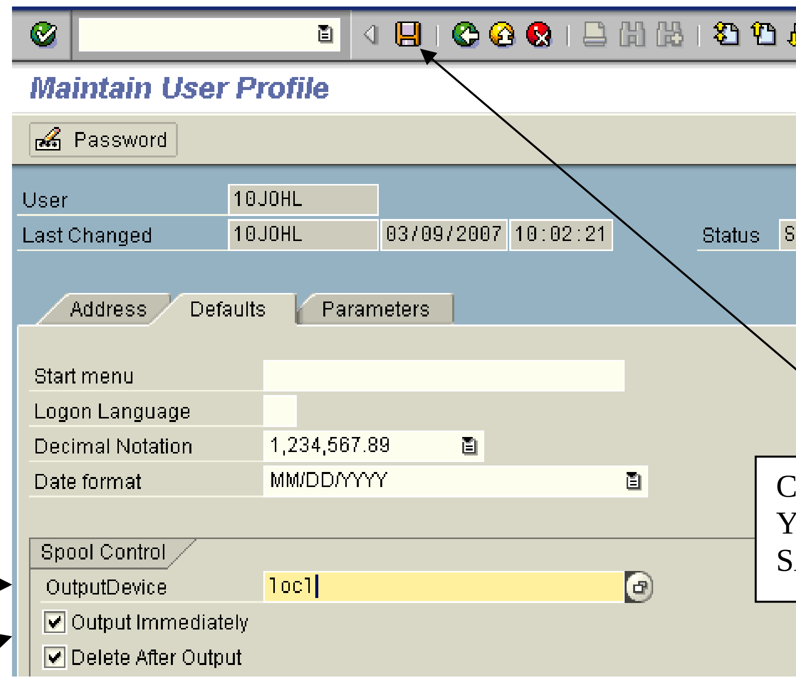
Some SAP windows will allow you to print. However, your software must be set up to do this. Follow these steps:

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

Click on the middle tab called Defaults

Local printer setup

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



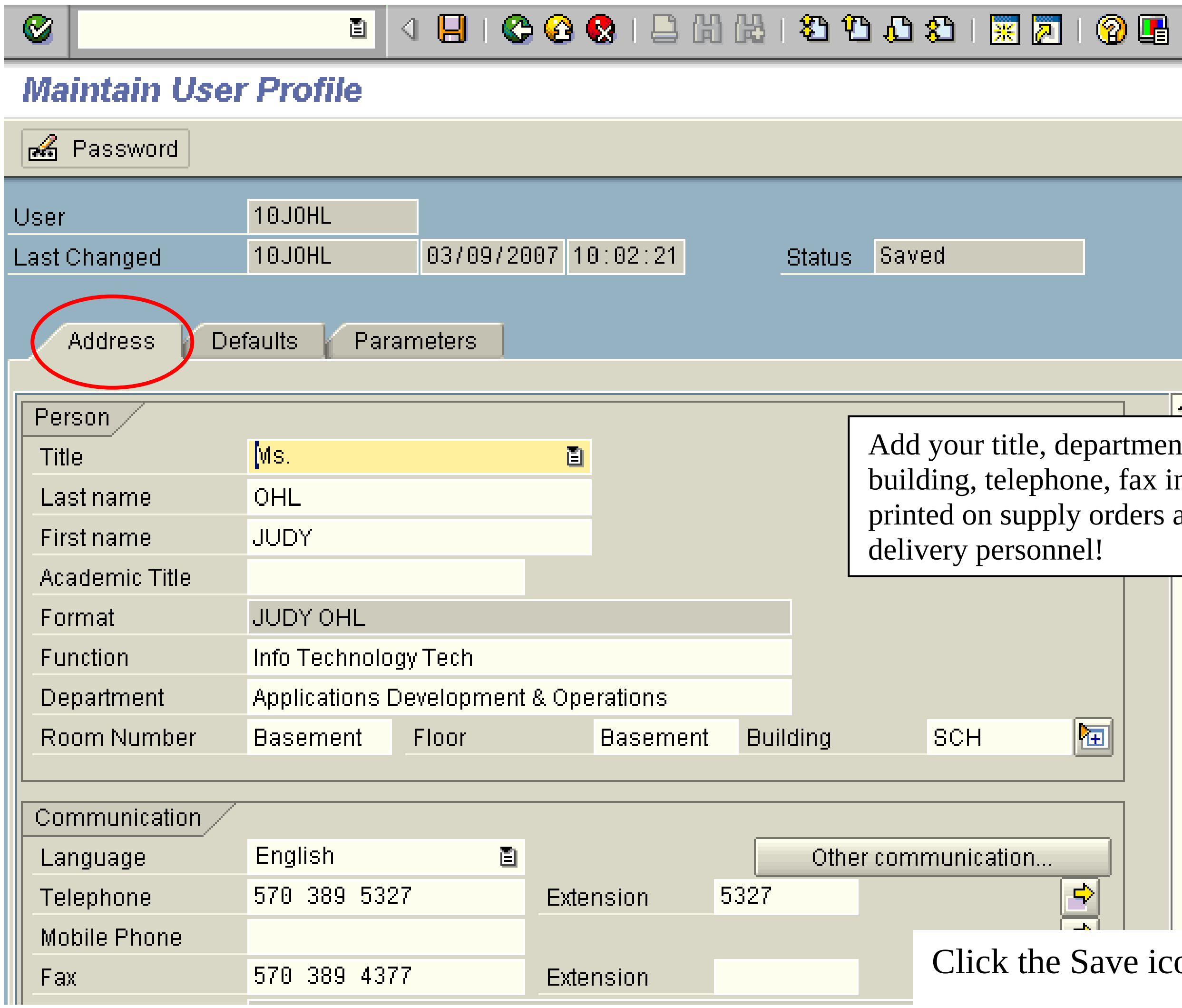
Click Save icon when done! You will be returned to the SAP main menu.

Type **locl** in OutputDevice field.

Place checkmarks in Output immediately and Delete after output.

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

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



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

Click the Save icon when finished.

STANDARD TOOLBAR

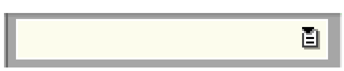
The **standard toolbar**, located just below the menu bar, contains buttons/icons for performing common actions such as *Save*, *Enter*, *Back*, *Exit*, *Cancel*, *etc.* The toolbar also contains the *Command* field (see white rectangular box with circle below) where transaction codes can be entered.

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

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

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

STANDARD TOOLBAR (Buttons/Functions)

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

Button	Name	Function
	Back	Returns you to the previous screen without saving your data. If there are required fields on the screen, these fields must be completed first.
	Exit	Exits the current function without saving. Returns you to the initial screen or main menu screen.
	Cancel	Exits the current task without saving. Same function as *Cancel* in the *Edit* menu.
	Print	Prints data from the current screen.
	Find	Searches for data required in the current screen.
	Find next	Performs an extended search for data required in the current screen.
	First page	Scrolls to the first page. Same function as the CTRL + Page Up keys.
	Previous page	Scrolls to the previous page. Same function as the Page Up key.
	Next page	Scrolls to the next page. Same function as the Page Down key.
	Last page	Scrolls to the last page. Same function as the CTRL + Page Up key.
	Create session	Creates a new SAP session. Same function as *Create session* in the *System* menu.

Button	Name	Function
	F1 Help	Provides help on the field where the cursor is positioned.
	Layout menu	Allows you to customize the display options.

CREATING A FAVORITE:

A favorite operates like a bookmark in an Internet Browser. It enables you to reach a transaction without using a menu path or typing in a transaction code. You can add multiple, frequently used transactions to your list of favorites so that you can reach your destination quickly without having to remember either the menu path or the transaction code.

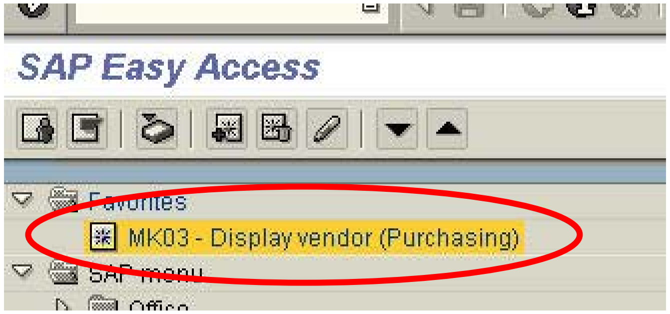
There are several ways to add a favorite. The easiest way to do this is to follow these steps:

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

Other ways to create a favorite:

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

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



CUSTOMIZING YOUR FAVORITES

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

CREATING YOUR OWN FOLDERS UNDER FAVORITES:

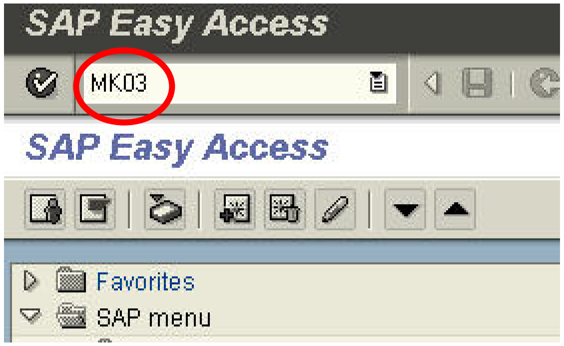
You can create folders to organize your favorites. For example, if you wanted to create 6 “favorites” and put them in a folder called Budget follow these steps:

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

ENTERING A TRANSACTION CODE IN THE COMMAND FIELD:

Another thing you can do instead of drilling down is use the transaction code associated with a transaction screen. Example: ZM08 is the transaction code to Display Vendors for Bloomsburg.

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



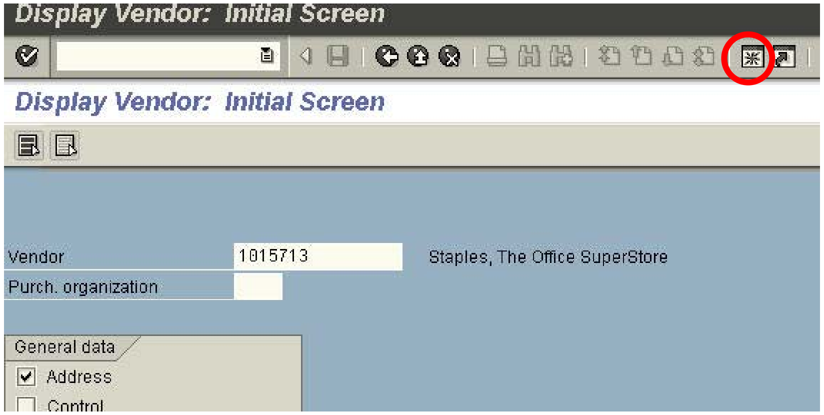
Once you enter the code, click on the green checkmark (next to the command field) or simply press the Enter key, and you will go right to that screen.

PAGING:

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

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

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



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

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

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

STATUS BAR

The *Status Bar* is located at the bottom of the SAP screen. It displays important system messages, such as errors and completion of transactions, as well as other session information. The following screen shows the message generated by the system after a purchase requisition was changed:

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

REQUIRED INPUT FIELDS:

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

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

SWITCHING SCREENS QUICKLY:

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

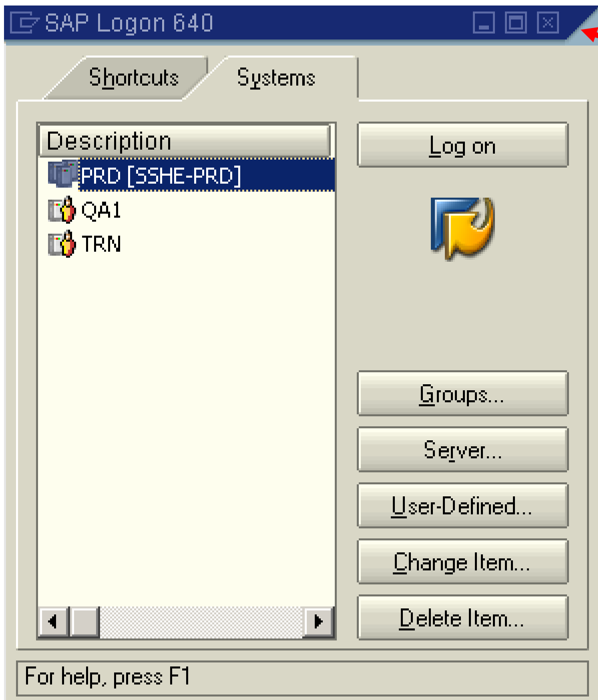
After you've typed the /n with the new transaction code, press Enter or click the green checkmark icon. You will be in the new transaction.

LOGGING OFF:

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

IMPORTANT NOTE ON LOGGING OFF:

Once you log off SAP, you will still have a little window open.



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

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

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