Lesson 1:

**SAP TERMINOLOGY**

SAP terminology along with classic financial terminology is used for business at MIT. The terminology presented in this lesson is used frequently both in this self-study and in financial communications at MIT.

**OBJECTIVES**

In this lesson you will become familiar with basic SAP terminology. At the completion of this lesson you will be able to:

- ✔ Recognize some with system-specific language
- ✔ Differentiate between a Cost Center, Internal Order and WBS Element
- ✔ Distinguish between Master and Transactional data.

⚠️ Note: SAP financial terminology is based on general accounting functions. If you do not have an accounting background, it is recommended that you attend the Accounting Fundamentals course prior to taking Basic Skills.

**SUMMARY OF BUSINESS RULES**

- ✔ None
Below is some SAP terminology that will be used throughout this training. Additional terminology may be introduced in subsequent lessons as needed.

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Environment</td>
<td>A completely self-contained version of the SAP database, designated for a specific purpose. A Production environment contains live, real-time data while a non-production environment such as the practice environment holds valid, but not real-time data, and is be used for learning examples. Separate environments do not exchange information. If you enter data into one environment, you will not be able to see that information in another environment.</td>
</tr>
<tr>
<td>GUI</td>
<td>Graphical User Interface. The SAPgui is the software on your computer or local server that allows you to connect to one or more of the SAP environments.</td>
</tr>
<tr>
<td>Master Data</td>
<td>Master data is a collection of information about a person or an object, e.g. a cost object, vendor, or G/L account. For example, a vendor master record contains not only general information such as the vendor’s name and address, but also specific information, such as payment terms and delivery instructions. Generally for endusers, master data is reference data that you will look up and use, but not create or change.</td>
</tr>
<tr>
<td>Material Group</td>
<td>Material Groups are codes that classify goods and services by commodity or service type and are used by the Procurement Office for reporting purposes. For example, desks belong to the material group 1920 Furniture and Furnishings.</td>
</tr>
<tr>
<td>User Profile</td>
<td>The collection of authorizations a user or set of users has been granted in order to perform transactions related to their jobs. For example, someone designated as a requisitioner might only have the ability to create and change, but not approve, requisitions.</td>
</tr>
<tr>
<td>Transactional Data</td>
<td>Transactional data is data related to a single business event such as a purchase requisition or a request for payment. When you create a requisition, for example, SAP creates an electronic document for that particular transaction. SAP gives the transaction a document number and adds the document to the transaction data that is already in the system. Whenever you complete a transaction in SAP, that is, when you create, change, or print a document in SAP, this document number appears at the bottom of the screen.</td>
</tr>
<tr>
<td><strong>Transaction Code:</strong></td>
<td>A unique command that tells the location of a system task. A transaction code may contain letters only or a combination of letters and numbers. For example, the transaction code for Display Purchase Requisition is ME53.</td>
</tr>
<tr>
<td>----------------------</td>
<td>----------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Workflow:</strong></td>
<td>A routing tool in SAP that forwards documents for review or approval. For example, a requisition that needs to be approved is sent to the appropriate approver's inbox. Workflow is also used to route journal vouchers, credit card charges, and other documents in SAP.</td>
</tr>
<tr>
<td><strong>Cost Object:</strong></td>
<td>A Cost Object collects expenses and revenues for a particular purpose, such as a research project. In SAP there are three types of cost objects: Cost Center, Internal Order, and WBS (Work Breakdown Structure) Element (see below for definition).</td>
</tr>
<tr>
<td><strong>Cost Center:</strong></td>
<td>General or operating Cost Objects are known in SAP as Cost Centers. Cost Centers are budgeted on the fiscal year.</td>
</tr>
<tr>
<td><strong>Internal Order:</strong></td>
<td>A non-sponsored Cost Object (for example, funding from the MIT Provost) used to track costs over periods other than fiscal years. Internal Orders are often created to track gifts or endowments at MIT.</td>
</tr>
<tr>
<td><strong>WBS Element:</strong></td>
<td>WBS Elements are funded by outside sponsors and are used to track costs of a particular research project over the entire span of its activity. They may also be created to track other sponsored activities, such as gifts.</td>
</tr>
<tr>
<td><strong>G/L Account:</strong></td>
<td>G/L accounts are also called Cost Elements in SAP. They are a classification by expense or revenue type. In the CO (Controlling) module of SAP, the term Cost Element is used. In the FI (Financial) module, the term G/L Account is used. These terms are used interchangeably for reporting, requisitions, and journal vouchers.</td>
</tr>
</tbody>
</table>

For a more detailed glossary of financial terminology used at MIT see the Glossary at http://web.mit.edu/sapr3/docs/.
SELF-CHECK

Answer the following questions using the information on the preceding pages for reference. The correct answers may be found on the next page.

Questions

1. Explain the difference between Master data and Transactional data:

2. What does GUI stand for?

3. Which of the following terms refers to a classification by expense and revenue type?
   a) Cost Object
   b) G/L account
   c) Material group

4. List the three types of Cost Objects:

Answers to Self Check

1. Master data - is a collection of data (information) about a person or an object. Transactional data - is data (information) that is related to a single business event.

2. Graphical User Interface

3. c. G/L Account

4. Cost Center, WBS Element, Internal Order
Lesson 2:

LOGGING IN

For this self-study, new users should log into the SAP Practice (sap-edu) environment. The Practice environment allows you to learn and practice the skills used throughout SAP without affecting the live Production environment.

OBJECTIVES

In this lesson you will become familiar with the basic SAP Log On procedure, as well as SAP security terminology. At the completion of this lesson you will be able to:

✔ Log on to SAP from your desktop computer
✔ Understand SAP and MIT security terminology
✔ Understand SAP Authorizations
✔ Identify your Authorized Requester

SUMMARY OF BUSINESS RULES

✔ SAP contains confidential MIT data, therefore new users are authorized (given access to transactions) based on their job responsibility.
✔ Kerberos user IDs and passwords should not be shared.
✔ The Authorized Requester for each department, lab and center requests SAP user profiles for new users.
✔ The SAP Production system logs you off after two hours of inactivity. However, the Practice system (sap-edu) does not use this time-out security feature.
GETTING STARTED

SAP Authorization
An SAP authorization is the electronic permission for a person to perform certain SAP functions. Authorizations consist of three parts:

✔ Person (needs a Kerberos ID)
✔ Function (e.g. reporting, requisitioning, approving requisitions)
✔ Qualifier (where can the person perform this function, e.g. profit center, fund center, cost object)

For example: Jason Strums (person) can create requisitions (function) for cost object 1234500 (qualifier).

Authorized Requester
An Authorized Requester is a person designated in each department, lab, or center (DLC) to be responsible for updating the Roles database or informing SAP User Accounts of any authorization changes needed in the Production environments for SAP users. These changes include:

✔ Requesting access for new SAP users
✔ Revising an existing user’s authorizations
✔ Deactivating a user’s SAP access

Roles Database
The Roles database is an MIT built application that allows departments to enter authorization information for multiple systems (SAP, NIMBUS, etc.) in a single place. The information entered into Roles by the Authorized Requester is fed to these other systems on a regular schedule.

Authorizations that are created or changed via the Roles database are automatically updated in both the Production and Practice environments on a nightly basis. For departments with specialized authorizations that must go through SAP user accounts, an update to the Practice environment must be specially requested at the same time the Production authorization request is made. (See more on Environments in the next section.)

👨‍💻 Your first step is to obtain a Kerberos user ID, after which you need to obtain an SAP user account. New SAP users should be given access to SAP (SAP user profile) by the Authorized Requester in their department, lab or center. If you do not have a Kerberos user ID or an SAP user profile, please contact your Authorized Requester (Primary Authorizor). http://web.mit.edu/sapr3/
SAP Environment

An SAP environment is a completely self-contained version of the SAP database, designated for a specific purpose. As an SAP end-user, you will be working in the Production environment to perform your departmental business transactions, and the Practice environment for training purposes.

Production

The Production environment is where actual financial transactions take place and contains the “data of record” for MIT. The Production environment runs on several application servers: Production-1, Production-2 and Production-3.

The three production servers are identical and share data and tables. Using multiple servers keeps the system from getting overloaded.

✔ If the name of your school or non-academic department begins with A-L, choose Production 1
✔ If the name of your school or non-academic department begins with M-Z, choose Production 2
✔ Production-3 has been reserved for future expansion, and Production-Batch is used only for running batch jobs such as JV uploads or long reports

Practice Environment: sap-edu

The Practice environment has the same functions and transactions as the Production environment, but also contains specially created data to support practice exercises.

✔ Your authorizations in sap-edu match Production following a 24-hour delay, as long as your department uses the roles database.

✔ The data that is found in sap-edu is not up to date with Production. The data in sap-edu consists of a periodic “snapshot” of the Production system, and it may be several months old.

✔ The work that is done in the Practice environment (sap-edu) will not affect the Production environment.

⚠ The Practice environment (sap-edu) is the environment that we will be using for this self-study. You will log into the Production environment after completing training in order to perform “real” transactions in SAP.
Logging On to the SAP Practice Environment (Macintosh)

In this exercise you will practice logging into the SAP Practice environment. If you have not already launched a Kerberos ticket you will have to first get a Kerberos ticket before you log into SAP. For example, if you checked your email, you already have a Kerberos ticket. If you double-click on the SAPgui icon on your desktop and you do not have an active Kerberos ticket, you will be prompted to enter your username and password before SAP will log you in.

<table>
<thead>
<tr>
<th>SAPgui Icon</th>
<th>1. Double-click on the SAPgui icon on your computer desktop.</th>
</tr>
</thead>
</table>

![SAPgui Icon Diagram]

The SAP Launch pad will appear on your screen. The Launch Pad is used to connect you to a specific SAP environment.

<table>
<thead>
<tr>
<th>Get a Kerberos ticket</th>
<th>2. In the SAP Launch pad double click on sap-edu.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>3. The “MIT Kerberos for Macintosh” screen will pop up. Enter the following information in the Kerberos Authentication pop up box:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name:</strong> your username</td>
</tr>
<tr>
<td><strong>Password:</strong> your password</td>
</tr>
</tbody>
</table>

*If you have already launched a Kerberos ticket, for example to read your Eudora email, this box will not appear and the SAPgui will simply launch.*
4. Click the OK button.

This will both establish your Kerberos ticket and launch SAP.

Starting SAP

When you have finished practicing and are ready to perform real transactions in SAP use the SAP Launch Pad to log into one of the Production environments instead of sap-edu.
PRACTICE

Logging On to the SAP Practice Environment (Windows)

In this exercise you will practice logging into the SAP Practice environment. If you have not already launched a Kerberos ticket you will have to first get a Kerberos ticket before you log into SAP. For example, if you checked your email, you already have a Kerberos ticket. If a Kerberos ticket already exists you can double-click on the SAPgui icon on your desktop or select it from the program menu and log into SAP.

Get a Kerberos Ticket

1. Follow the Menu Path:
   Start>>Programs>>SAP Frontend>>Leash32 Shortcut

   If you have checked your email in Eudora, you already have a Kerberos ticket.

2. The Kerberos “Leash” screen pops up.
3. Click on the **Renew Ticket(s) button**.

4. Enter your **username** and click OK.

5. Enter your **password** and click OK.

6. Minimize the Leash32 window by clicking the **Minimize button** in the upper right corner of the window.

7. Follow the Menu path:
   
   **Start>>Programs>>SAP Frontend>>sap-edu**

   When you have finished practicing and are ready to perform real transactions in SAP use the SAP Launch Pad to log into one of the Production environments instead of sap-edu.
Check

Answer the following questions using the information on the preceding pages for reference. The correct answers may be found on the next page.

Questions

1. Who is responsible for a Department, Lab or Center’s authorizations in SAP?

2. True or False: If you create a document in the Practice environment (sap-edu) it will automatically be created in the Production environment.

3. An active ___________ ___________ is required before a user can log in to SAP. This is a security feature.
Answers to Self Check

1. The Authorized Requester

2. False, activity performed in one environment does not affect any other.

3. Kerberos Ticket
Lesson 3:

**BASIC SAP NAVIGATION**

This lesson introduces you to basic SAP navigation, including the basic screens, menus, transaction codes and icons that you will use frequently. The first step to learning SAP is to become familiar with SAP navigation. Understanding the skills presented in this lesson is necessary prior to completing other lessons in this self-study course.

**OBJECTIVES**

In this lesson you will become familiar with the basics of SAP navigation. At the completion of this lesson you will be able to:

✔ Recognize typical SAP screen features
✔ Understand how to use the Navigation Area
✔ Navigate between the “SAP Standard” main menu and the MIT custom "User menu"
✔ Use the Matchcode search function
✔ Open a second session in SAP
✔ Use transaction codes

**SUMMARY OF BUSINESS RULES**

✔ None

⚠️ As you continue to work on your own with the SAP system, you will discover that it offers many ways of completing standard tasks. This great flexibility allows each user to develop his or her own preferences for using navigation options and system shortcuts.
GETTING STARTED

SAP Screen Features

A typical SAP screen has seven main areas: Screen Header, Menu Bar, Standard Toolbar, Title Bar, either a Navigation Toolbar or Application Toolbar, Screen Body, and Status Bar. There are some cosmetic differences between the SAP screens on a Macintosh and on a PC, but the menus and most of the buttons are the same.

Figure 1

(1) Screen Header
On a Macintosh, the Screen Header displays the name of the current system, session, and client (environment) you are working in. On a PC it displays standard Window buttons such as minimize, maximize, and close.

(2) Menu Bar
The Menu Bar contains menus for the functional and administrative areas of the system. As you navigate through SAP screens, the options on the menu bar will change, but every menu bar will contain System and Help. Clicking on the System option on the menu bar opens a drop down menu of useful functions such as Create session, End session and Log off.
(3) Standard Toolbar

The Standard Toolbar contains the Command field and the standard SAP Toolbar buttons.

Command Field

The Command field is used to enter transaction codes that take you directly to a system task without using menus. Sometimes the Command field is closed by default. To open it, click the arrow to the left of the Save button. To use it, type the transaction code in the blank field to the left and press Enter.

If a Toolbar button is gray, it is not available for use on that particular screen.

Standard Toolbar Buttons

The SAP buttons displayed on the Toolbar provide quick access to commonly used SAP functions. The table below describes the standard toolbar buttons. A list of other frequently used buttons and functions can be found at <http://web.mit.edu/sapr3/docs/webdocs>

<table>
<thead>
<tr>
<th>Button</th>
<th>Keyboard Shortcut</th>
<th>Description</th>
<th>Button</th>
<th>Keyboard Shortcut</th>
<th>Description</th>
<th>Button</th>
<th>Keyboard Shortcut</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Enter key</td>
<td>Enter/Continue</td>
<td>Ctrl P</td>
<td>Print</td>
<td>Page Down</td>
<td>Ctrl S</td>
<td>Save to database</td>
<td>Next page</td>
</tr>
<tr>
<td>F3</td>
<td>Back</td>
<td>Ctrl F</td>
<td>Ctrl S</td>
<td>Save to database</td>
<td>Ctrl Page Down</td>
<td>F3</td>
<td>Back</td>
<td>Ctrl Page Down</td>
</tr>
<tr>
<td>Shift F3</td>
<td>Exit system task</td>
<td>Ctrl G</td>
<td>Ctrl F</td>
<td>Find</td>
<td>Ctrl Page Down</td>
<td>F1</td>
<td>Help</td>
<td>F1 (Mac only)</td>
</tr>
<tr>
<td>F12</td>
<td>Cancel</td>
<td>Ctrl Page Up</td>
<td>Ctrl G</td>
<td>Continue Search</td>
<td>None</td>
<td>Alt 12</td>
<td>Cancel</td>
<td>Alt 12 (PC only)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Page Up</td>
<td>Ctrl Page Up</td>
<td>First page</td>
<td>None</td>
<td>Customize local layout</td>
<td>Create new session</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Previous page</td>
<td>Ctrl Page Up</td>
<td>First page</td>
<td>None</td>
<td>Customize local layout</td>
<td>Create new session</td>
<td></td>
</tr>
</tbody>
</table>

Keyboard Shortcuts

Instead of an SAP button, you can sometimes use a keyboard shortcut. Keyboard shortcuts allow the use of a key or combination of keys to perform the same function as a button. On a PC, the button name and keyboard shortcut are displayed when you place the mouse over the button. The Mac does not display keyboard shortcuts, but the keys function the same as on a PC. See the SAP for MIT web documentation Getting Started: SAP Buttons for a list of the most frequently used SAP buttons and their shortcuts <http://web.mit.edu/sapr3/docs/webdocs>. 
(4) Title Bar
The Title Bar displays the name of the screen you are working in.

(5a) Navigation Toolbar
The Navigation Toolbar contains the SAP Standard Menu, SAP User Menu buttons and Favorites.

(5b) Application Toolbar
The Application Toolbar is located directly below the screen title, in the place of the Navigation Toolbar. It contains buttons that duplicate functions available from the menu bar but provide quicker access to some of the most commonly used functions for the current screen and system task. For instance, the Execute button is often available in the first position of the Application Toolbar. For information on other frequently used function buttons see the SAP for MIT web documentation Getting Started: SAP Buttons <http://web.mit.edu/sapr3/docs/webdocs>.
(6) Screen Body

In SAP, the Screen Body will display different elements depending on where you are in the system. On the SAP User Menu and the SAP Standard Menu screens, the screen body contains the navigation area and the non-active work area. In the SAP Inbox, both the navigation area and the work area are active. In an SAP transaction screen, the screen body contains only the work area and has entry fields in which you can enter, change, or display information to accomplish your system task.

SAP has three field types: Required, Default, and Optional

1. Required Entry fields are usually flagged with a question mark. You must enter data in Required Entry fields in order to proceed with a system task.
2. Default Entry fields already have a system entry. However, you may be able to overwrite the system entry depending on the system task and / or your SAP profile.
3. Optional Entry fields are those in which you may enter data, but an entry is not required by the system in order to proceed with a system task. Some Optional Entry fields may become required depending on the values entered in other fields.

Some fields that are optional in SAP are required by MIT’s business rules. SAP does not enforce MIT business rules in every case, but you will be expected to learn the MIT business rules for transactions you will enter in SAP.

(7) Status Bar

The Status Bar, located at the bottom of the SAP screen, displays system messages and other session information.

![Figure 3]

System Messages

The large field to the left displays system messages including document numbers, error messages or instructions, such as “Make an entry in all required fields.” It is important to check the status bar if you need to record your document numbers for further processing.

Double-click on the message or click the red circle and a dialogue box pops up that explains the message and what action to take.
System Information

The second field on the status bar defaults to display the system information such as system name (session number), and (client number). In the example above, the system is SF6, the session number is (1) and the client number is (030).

You can open or close the second, third, and fourth fields. Click the arrow to the left of the system name. To redisplay the information, click the arrow in the right corner of the Status Bar.

To change the information displayed in this area, click the Selection List button to the right of the client number and select from the list that pops up:

On a Macintosh:  System  On a PC:  System
Client                Client
User                 User
Response             Program
Transaction          Transaction
Response Time        Response Time
Round Trip/Flushes   Round Trip/Flushes
GETTING STARTED

The SAP Standard and SAP User Menus

The Navigation Area is made up of folders and subfolders navigating to Transaction Cubes, which access transactions. To access those folders and subfolders, you use dropdown arrows, as will be described in the following exercise. Most departmental users at MIT will see only the Role ZMIT folder on their User menu. However, some may see additional or different “Roles”, especially those users who perform central financial functions.

There are two main menus you will encounter in SAP: the “SAP User menu” screen and the “SAP Standard menu” screen. When you log onto SAP, you will see one of these two menus, depending on how your SAP user profile is set up.

The “SAP User menu” screen is a custom menu designed to help MIT departmental users navigate easily through SAP functions. It is sometimes called the ZMIT screen and will allow you to accomplish most of your day-to-day functions without having to find your way through the full SAP R/3 menu.

The SAP custom User menu screen

Figure 4

The SAP Standard menu, which is delivered with the SAP system.

Figure 5
# Use the Navigation Area

The area of the screen where the menu folders and Favorites folder are located is called the Navigation Area. You can open and close the folders there by clicking on the arrows to the left of each folder.

<table>
<thead>
<tr>
<th>Navigation</th>
<th>Access the SAP User menu screen, if you are not already there.</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>To open the Role ZMIT folder, click on the dropdown arrow to the left of the Role ZMIT folder. The dropdown arrow will reorient and the Role ZMIT subfolders will be displayed.</td>
</tr>
<tr>
<td>2.</td>
<td>Click on the dropdown arrow to the left of the Purchasing folder.</td>
</tr>
<tr>
<td>3.</td>
<td>Click on the dropdown arrow to the left of the Requisitioning folder. A list of transactions will be displayed.</td>
</tr>
<tr>
<td>4.</td>
<td>Double-click on the Transaction cube next to Display a Requisition to open the transaction. The initial screen will be displayed.</td>
</tr>
<tr>
<td>5.</td>
<td>For this exercise, just navigate back to the User menu using the yellow Exit arrow on the standard toolbar.</td>
</tr>
<tr>
<td>6.</td>
<td>Click on the dropdown arrow next to the Requisitions folder to collapse it.</td>
</tr>
</tbody>
</table>
Navigate Between SAP Menus

In this exercise you will practice moving between the SAP User menu and the SAP Standard menu. MIT has built the custom User menu in order to provide a shortcut to frequently used transactions, however you may need certain transactions that are not attached to the MIT custom User menu in order to perform your job.

<table>
<thead>
<tr>
<th>Navigate between main menus</th>
<th>1. To go to the SAP Standard menu screen from the SAP User menu screen, click on the SAP menu button on the Navigation toolbar.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2. To navigate to the SAP User menu screen from the SAP Standard Menu screen, click on the User menu button on the Navigation toolbar.</td>
</tr>
</tbody>
</table>

💡 The menu you are in when you log out is where you will start on log in.
GETTING STARTED

Use Matchcode Search

In many cases, SAP requires the entry of a numerical code to indicate a chosen value, like a vendor number to indicate the particular vendor from whom you wish to purchase. Because SAP users cannot remember all of these thousands of numerical values, SAP offers a variety of search functions to assist users in finding the values they need.

For most data fields, SAP provides a Matchcode, or search, feature. The Matchcode function allows you to select from a list of possible entries for a field if the list is short enough, or if the available list is too numerous to display, to search for information in a variety of ways.

If a field has a Matchcode option, you will see an ▼ (▼ on a Mac) at the right side of the field when you click on it. Depending on how many entry options exist for that field, the system displays one of the following:

✔ A simple list of possible entries, e.g., a list of Material groups (Figure 1)
✔ A graphical selection tool, e.g., a calendar to select a date
✔ A “Search help selection” window (Figure 2)

Figure 6
Wildcard Search

The Wildcard search format is used in Matchcode search fields. The wildcards or (*)'s are placed on either side of the search term in order to search for partial data in SAP. For example, if you remember that there is a G/L Account for meetings but you are not sure of the full name, you can use (*meet*) to search for that G/L Account. SAP will give you a list of all G/L Accounts with the word meet in them.
Use Matchcode Search

The following exercise demonstrates the use of the "Search help selection" window.

<table>
<thead>
<tr>
<th>Navigation</th>
<th>Access the SAP User menu screen, if you are not already there.</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>From the SAP User Menu screen, follow the navigation path:</td>
</tr>
<tr>
<td></td>
<td>User Menu</td>
</tr>
<tr>
<td></td>
<td>Role ZMIT</td>
</tr>
<tr>
<td></td>
<td>Master Data</td>
</tr>
<tr>
<td></td>
<td>Purchasing Data</td>
</tr>
<tr>
<td></td>
<td>Display a Vendor (double-click)</td>
</tr>
<tr>
<td></td>
<td>The Display Vendor: Initial Screen is displayed.</td>
</tr>
<tr>
<td>2.</td>
<td>Click on the Matchcode button (on a Mac) to the right of the</td>
</tr>
<tr>
<td></td>
<td>Vendor field</td>
</tr>
<tr>
<td></td>
<td>The Restrict Value Range dialog box appears.</td>
</tr>
<tr>
<td>Restrict Value Range Searches</td>
<td>Restricting value ranges allows you to define your search better by limiting your search.</td>
</tr>
<tr>
<td>3.</td>
<td>Click on the Tab List button in the upper right corner of the</td>
</tr>
<tr>
<td></td>
<td>dialog box:</td>
</tr>
<tr>
<td></td>
<td>Select E: Vendors: Purchasing</td>
</tr>
</tbody>
</table>
Selection Criteria Screen

4. Enter the following information:
   Name: *wish*

5. Click the Enter button.

On the Hit List, Deathwish is listed twice because that vendor is used by both Procurement and Subcontracts (note that the vendor number is the same).

You see the double entry because this particular selection option displays vendors according to the Purchasing organization.

6. Double-click on the first item on the list. You will return to the previous screen with the vendor number entered in the field.
**PRACTICE**

**Use Matchcode Search**

The following exercise demonstrates restricting value ranges.

<table>
<thead>
<tr>
<th>Navigation</th>
<th>Access the SAP User menu screen, if you are not already there. Or, if you are continuing from the previous Practice, skip directly to Step 3.</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>From the SAP User menu screen, follow the navigation path:</td>
</tr>
<tr>
<td></td>
<td>User Menu</td>
</tr>
<tr>
<td></td>
<td>Role ZMIT</td>
</tr>
<tr>
<td></td>
<td>Master Data</td>
</tr>
<tr>
<td></td>
<td>Purchasing Data</td>
</tr>
<tr>
<td></td>
<td>Display a Vendor (double-click)</td>
</tr>
<tr>
<td>2.</td>
<td>Click on the Vendor field.</td>
</tr>
<tr>
<td>3.</td>
<td>Click on the Matchcode button (on a Mac). The Restrict Value Range dialog box appears.</td>
</tr>
<tr>
<td>4.</td>
<td>Click on the Tab List button in the upper right corner of the dialog box:</td>
</tr>
<tr>
<td></td>
<td>This time select A: Vendors (General)</td>
</tr>
<tr>
<td>Selection Options</td>
<td>In this scenario, you remember that the name of your vendor begins with two Zs.</td>
</tr>
<tr>
<td>5.</td>
<td>Click in the Name field.</td>
</tr>
<tr>
<td>6.</td>
<td>Click on the Selection Options button</td>
</tr>
</tbody>
</table>
7. Select the Greater than or Equal to button.

8. Click the Enter button.

9. Click on the Name field and type: ZZ

10. Click the Enter button and SAP returns a list of all vendors with names beginning with ZZ.

11. Click the Exit button to return to Display Vendor: Initial Screen.

Multiple Selection Options

In this scenario, you remember that the vendor number you are looking for begins with four 1s.

12. Click on the Matchcode button next to the Vendor field.

13. At the A: Vendors (General) screen, click in the Vendor field.

14. Click on the Multiple Selection button to set the value ranges.

15. Click on the Ranges tab with the green button.

Using the Ranges tab with the green button includes the range of values selected. The Ranges tab with the red button is used to exclude values in a range. This is explained in greater detail in lesson 4.

16. Enter 111100 to 111199 in the two boxes on the top line.
17. Click on the **Copy** button.

We cannot display this here in black & white, but when you return to the Restrict Value Range dialog box, you will know you have an active “multiple selection” because the bar on the button turns green.

18. Click the **Enter** button. The Hit List dialog box appears.

   The vendor listing includes all those with Vendor Numbers that begin with four 1s.

**Sort the list**

19. Double-click on any **vendor** to select it. You will return to the previous screen with the new vendor number entered in the field.

20. Click the **Yellow Arrow** button to return to the **SAP User menu**.
GETTING STARTED

Working With Multiple Sessions:
In SAP it is possible to have two or more windows or sessions open at one time. This feature is useful in many situations, for example: If you want to have a report active in each window so you could compare or If you want to copy information from a previously posted journal voucher into a JV you are creating.

Although it is possible to have up to six sessions running at a time, as a general rule, please only have two sessions open at any one time to minimize the impact on system resources.

When you are finished with the second session and no longer need it, follow the menu path System>>End Session from that session to close it.

Figure 8
Example of several open sessions on a Mac
# Open and Close a Second Session

In this exercise you will create a second session within SAP.

<table>
<thead>
<tr>
<th>Open a second session.</th>
<th>A second session may be opened from any screen in SAP.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1. From the menu bar at the top of the screen, follow the menu path:</td>
</tr>
<tr>
<td></td>
<td><code>System&gt;&gt;Create session</code></td>
</tr>
<tr>
<td></td>
<td>Result: A second session opens (it may take a moment).</td>
</tr>
<tr>
<td></td>
<td>The additional session will open to the SAP custom User Menu.</td>
</tr>
</tbody>
</table>

Example of two open sessions on a PC.

![Example of two open sessions on a PC.](image)

- **In the Windows environment you can switch between sessions by clicking on the appropriate box on the Windows Task Bar at the bottom of the screen.**

<table>
<thead>
<tr>
<th>Close a second session.</th>
<th>A second session may also be closed from any screen in SAP.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2. Follow the menu path:</td>
</tr>
<tr>
<td></td>
<td><code>System&gt;&gt;End Session</code></td>
</tr>
<tr>
<td></td>
<td>Result: The additional session will close.</td>
</tr>
</tbody>
</table>
GETTING STARTED

Navigate Using Transaction Codes

SAP provides a unique multi-character identifier for each system task. This shorthand name is called a transaction code. A transaction code may contain letters only, or a combination of letters and numbers, for example, `zstm` (Summary Statement) or `me53` (Display Requisition). Used in conjunction with a prefix such as `/n` or `/o`, a transaction code becomes a navigation alternative to using a menu path to get to a system task.

SAP only recognizes transaction codes when used with prefixes. Prefixes determine the way in which SAP will access the indicated transaction. The two prefixes you will use most frequently are:

- `/n` ends the current transaction and switches to the new one without saving any data in the current transaction
- `/o` opens a new SAP session and accesses the new transaction without ending the current one (which will remain open in the background session)

To navigate with transaction codes, combine a prefix with a transaction code and type the resulting command (e.g. `/nme53`) in the Command field on the Standard Toolbar.

In the graphic below, the prefix `/n` indicates that the user wants to end the old transaction and start a new one. The transaction code `me53` tells the system which transaction screen (Display Requisition) to view instead.

![Image of SAP Easy Access - User menu for Jane F White with `/nme53` in the Command field](image)

Figure 9
Figure 10

The default setting for MIT users is to “Display technical names” (transaction codes) next to each transaction name in the Navigation area. So if you are looking for the transaction code for a particular function, you can find it just by following the menu path until it is displayed.

If you do not see transactions codes listed next to transactions in the Navigation Area, refer to Lesson 8 to change your settings so they are visible.
Navigate Using Transaction Codes

Transaction codes can be entered from anywhere in SAP, but be careful if you are using the prefix /n, as it will exit the current task without saving any data you have entered so far.

| Navigation |
|-------------------|--------------------------------------------------|
| **Enter transaction code:** /n -- new transaction | 1. In the command field, enter the transaction code: /nme53 |
|                  |
| 2. Click the **Enter** button, or press **Return** on your keyboard. |
|                  |
| SAP will leave the current transaction and take you to the Display: Purchase Requisition: Initial Screen. |
|                  |
| **Enter transaction code:** /o -- open new session |
| 3. In the command field, enter the transaction code: /oxk03 |
| | |
| **Warning** When using transaction codes, you must be careful to distinguish between the letter ‘o’ and numeral zero. In the example above, the prefix /o is the letter ‘o’, while the transaction code xk03 uses numeral zero. |
| 4. Click the **Enter** button, or **Return** on your keyboard. |
| 5. Close the new session and proceed to the next Lesson. |
SELF-CHECK

Using what you have learned in this lesson, perform the following tasks:

Questions

1. Locate the G/L account number for “Office Supplies”

2. Locate a book vendor with the word *tatter* in their name.

3. Identify the indicated parts of the screen:
   a.
   b.
   c.
   d.
Answers to Self Check

1. 420258

2. Tattered Cover Bookstore

3. a. Standard Toolbar
   b. Application Toolbar
   c. Screen Body
   d. Status Bar