SAP Basic Navigation
Self-Study
For
Human Resources
Edition 2.00

Doc#: S-062002-BAS-IV-2.00
Copyright 2002 Massachusetts Institute of Technology
Table of Contents

Introduction ................................................................. v
Explains the purpose of the self-study, prerequisites, and guidelines for use.

Lesson 1: Logging In .......................................................... 1
Walks through the SAP log on process.

Lesson 2: Basic SAP Navigation ............................................. 11
Describes basic SAP screen and buttons, explains moving between menus, and other commonly used functions.

Lesson 3: End User Customization ........................................ 37
Describes how to customize SAP screens and create Favorites.

Lesson 4: Search Fundamentals ............................................. 55
Covers basic SAP search fundamentals and introduces matchcode searches.

Lesson 5: Log Off SAP ...................................................... 73
Walks through the SAP log off process.

Appendix: SAP/HR Terminology .......................................... 79
Introduces frequently used SAP terminology.
INTRODUCTION

SAP stands for System Applications and Products. It is the name of both the online human resource and financial software and the company that developed it. SAP is made up of individual modules that perform various organizational system tasks. MIT has customized and implemented the SAP modules that best suit its organizational needs.

This self-study is designed for HR and Payroll staff new to SAP, and it is a prerequisite for all other SAP Human Resource training. The HR Basic Navigation self-study can be used as a reference document as you continue building your knowledge of SAP. The SAP terminology that is found in the Appendix will apply to all SAP/HR modules.

PREREQUISITES
Before you begin this self-study, you must have the following:

Kerberos user ID. A Kerberos user ID identifies you to the MIT electronic security system. At MIT, you will use your Kerberos user ID and password for multiple purposes, besides SAP.

SAP user profile. An SAP user profile is established to identify the authenticity of the individual logging on to SAP and to specify the functions that the user is allowed to perform. For HR staff, this will be taken care of as part of the implementation and set-up for training and go-live.

Access to a practice SAP environment and the SAP Production live environment. The practice environment (sap-edu) has the same functions and transactions as the Production environment but has specific data for practice exercises.
How to Use This Self-Study

The SAP Basic Navigation for Human Resources is MIT-specific and is designed for new SAP users. The self-study is divided into lessons, and you are encouraged to complete the lessons in the order presented so that you may thoroughly understand the material in each lesson before attempting to complete the next in the series.

You are also provided with an Appendix of SAP terminology that is used throughout the self-study. The terminology is divided into three sections: System Terminology, HR-Payroll Terminology, and Financial Terminology.

OBJECTIVES

After completing this SAP Basic Navigation for Human Resources, you will be able to:

✓ Log on and off SAP

✓ Navigate within SAP

✓ Customize SAP screens and create Favorites

✓ Search for information in SAP

✓ Understand basic SAP and MIT terminology

LESSONS

This self-study is divided into five Lessons and a Terminology Appendix, each lesson focusing on a particular skill or function. These lessons allow you to learn and practice some of the basic skills used throughout SAP, and each lesson includes:

- **Overview and Objectives**: the purpose and goals of each lesson

- **Getting Started**: descriptive background material needed before a participant can begin the hands-on portion of the lesson

- **Practice**: step-by-step exercises designed to familiarize the participant with the given function in SAP

- **Self-Check**: optional exercises designed to reinforce learning

- **Notes**: blank pages for participants notes on the given Lesson

As you continue to work on your own with the SAP system, you will discover that SAP 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.
Lesson 1:

LOGGING IN

For this self-study, new users should log into the specified Practice environment (sap-edu). 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. For a more complete list of SAP terminology please refer to the Appendix that is found at the back of this self-study. 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

SUMMARY OF BUSINESS RULES

✓ SAP contains confidential MIT data, therefore new users are authorized (given access to transactions and data) based on their job responsibility.

✓ Kerberos user IDs and passwords should not be shared.

✓ The SAP Production system logs you off after two hours of inactivity. However, the practice systems do 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. editing employee address information, entering new hire data)
- ✔ Qualifier (where can the person perform this function, e.g. across the Institute, for a particular department, etc.)

For example: Jason Strums (person) can enter new hire data (function) for department 400111 (qualifier).

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 a practice environment (sap-edu) for training purposes. (see the Appendix for a more detailed definition)

PRACTICE
The data in the practice environment consists of a periodic snapshot of the Production system, and it may be several months old. Work that is done in a practice environment will not affect the Production environment

PRODUCTION
The Production environment is where actual human resource and financial transactions take place and contains the "data of record" for MIT. The 3-tier 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 (HR staff should use this server)
- ✔ 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 uploads or long reports
Logging On to the SAP Practice Environment

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 E-mail, 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 E-mail 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**
**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.

<table>
<thead>
<tr>
<th>Questions</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. An ____________ in SAP is made up of three parts: a Person, a Function and a Qualifier.</td>
<td></td>
</tr>
<tr>
<td>2. True or False: If you enter data in a practice environment it will automatically exist in the Production environment.</td>
<td></td>
</tr>
<tr>
<td>3. An active ____________ ____________ is required before a user can log in to SAP. <em>Hint: this is a security feature.</em></td>
<td></td>
</tr>
</tbody>
</table>
## Answers to Self Check

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Authorization</td>
</tr>
<tr>
<td>2</td>
<td>False, activity performed in one environment does not affect any other.</td>
</tr>
<tr>
<td>3</td>
<td>Kerberos Ticket</td>
</tr>
</tbody>
</table>
Lesson 2:

**BASIC SAP NAVIGATION**

This lesson introduces you to basic SAP navigation, including the basic screens, menus, transaction codes and buttons 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

✔ Recognize Standard SAP Buttons

✔ Understand how to use the Navigation Area

✔ Navigate between the SAP Standard menu and the MIT custom User menu

✔ Open a second session in SAP

As you continue to work on your own with the SAP system, you will discover that it offers several different ways of completing standard tasks. This great flexibility allows each user to develop personalized preferences for using navigation options and system shortcuts.
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.

**Screen Header**
Displays standard Window buttons such as minimize, maximize, and close. On a PC the Screen Header also contains the Stop Transaction button (upper left corner), which can be used for stopping transactions (reports) that have already been run.

**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.
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 a Command field, type the transaction code in the blank field to the left and press Enter. The Command field also stores and displays past transaction codes that have been entered.

Closed Command Field:

Open Command Field:

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.

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

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
<th>Button</th>
<th>Description</th>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Checkmark]</td>
<td>Enter/Continue</td>
<td>![Print Icon]</td>
<td>Print</td>
<td>![Next Page Icon]</td>
<td>Next page</td>
</tr>
<tr>
<td>![Save Icon]</td>
<td>Save to database</td>
<td>![Find Icon]</td>
<td>Find</td>
<td>![Last Page Icon]</td>
<td>Last page</td>
</tr>
<tr>
<td>![Back Icon]</td>
<td>Back</td>
<td>![Continue Search Icon]</td>
<td>Continue Search</td>
<td>![Help Icon]</td>
<td>Help (Mac only)</td>
</tr>
<tr>
<td>![Exit Icon]</td>
<td>Exit system task</td>
<td>![First Page Icon]</td>
<td>First page</td>
<td>![Create New Session Icon]</td>
<td>Create new session (PC only)</td>
</tr>
<tr>
<td>![Cancel Icon]</td>
<td>Cancel</td>
<td>![Previous Page Icon]</td>
<td>Previous page</td>
<td>![Customize Local Layout Icon]</td>
<td>Customize local layout (PC only)</td>
</tr>
</tbody>
</table>

Title Bar
The Title Bar displays the name of the screen you are working in.

Navigation Toolbar
The Navigation Toolbar contains the SAP Standard Menu, SAP User Menu buttons and Favorites.
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 HR functions for the current screen and system tasks. For instance, the Overview button is often available in the last position of the Application Toolbar.

The SAP buttons displayed on the Application Toolbar provide quick access to commonly used SAP HR functions. The table below describes the standard toolbar buttons that can be found in Display and Maintain HR Data.

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

**Application Toolbar Buttons**

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
<th>Button</th>
<th>Description</th>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Create New Data" /></td>
<td>Create New Data</td>
<td><img src="image" alt="Delimit Data" /></td>
<td>Delimit Data</td>
<td><img src="image" alt="Display Data" /></td>
<td>Display Data</td>
</tr>
<tr>
<td><img src="image" alt="Change Data" /></td>
<td>Change Data</td>
<td><img src="image" alt="Delete Data" /></td>
<td>Delete Data</td>
<td><img src="image" alt="Copy Data" /></td>
<td>Copy Data</td>
</tr>
<tr>
<td><img src="image" alt="Overview of Data" /></td>
<td>Overview of Data</td>
<td><img src="image" alt="Next Record" /></td>
<td><em>Next Record</em></td>
<td><img src="image" alt="Previous Record" /></td>
<td><em>Previous Record</em></td>
</tr>
</tbody>
</table>

*The Next Record and Previous Record buttons are only visible when multiple records exist. For example: an Address Infotype may have a home, office and alternate office subtypes.*
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 an SAP transaction screen the screen body contains: the Object Manager which is used as an area for conducting searches for personnel data files, and the Work Area that has entry fields in which you can enter, change, or display information to accomplish your system task.

The SAP Work Area has three field types: Required, Default, and Optional

1. **Required Entry fields** are usually flagged with a checked box. 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.
**Status Bar**

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

- **System Messages**
  The large field to the left displays system messages including: warning messages, error messages or instructions, such as *Make an entry in all required fields.*

  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, and the session number is (1).
GETTING STARTED

THE SAP STANDARD AND SAP USER MENUS

The Navigation Area is made up of folders and subfolders. To access those folders and subfolders, you use dropdown arrows, as will be described in the following exercise.

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. To switch between the different SAP menus, click on either the **SAP User Menu** button or the **SAP Standard Menu** button.

The SAP User menu screen is a custom menu designed to help MIT users navigate easily through SAP specific HR functions. It 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 User menu is created and customized based on the user's job functions and authorizations in SAP. For example, Benefits Administrators are authorized to use the benefits menu, while other HR staff members may be authorized to use the Personnel Administration menu.

![SAP Custom User menu screen](image)

- The figure above displays several different customized menu options. The above menu options are different from the customized menu that you will see on your screen.
The SAP Standard menu contains folders for standard SAP delivered modules.
PRACTICE

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.

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.

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.

The menu you are in when you log out of SAP, will be the menu that you will start in when you log back into SAP.
### PRACTICE

#### 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.

> For this self-study you will be using the Benefits menu which also contains standard HR transactions. In the Production Environment you will see a customized menu.

<table>
<thead>
<tr>
<th>Navigation</th>
<th>1. Access the SAP User menu screen, if you are not already there.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2. To open the Role Z_HRBEN_CAMPUS_ADMINISTRATOR folder,</td>
</tr>
<tr>
<td></td>
<td>click on the arrow to the left of the Role Z_HRBEN_CAMPUS_ADMINISTRATOR folder.</td>
</tr>
<tr>
<td></td>
<td>3. The arrow will reorient and the Role Z_HRBEN_CAMPUS_ADMINISTRATOR subfolders and transactions will be displayed.</td>
</tr>
<tr>
<td></td>
<td>4. Click on the arrow to the left of the Group Processing folder.</td>
</tr>
<tr>
<td></td>
<td>5. Click on the arrow to the left of the Forms folder. A list of transactions will be displayed.</td>
</tr>
<tr>
<td></td>
<td>6. Double-click on PA - 20 Display HR Master Data to open the transaction. The initial screen will be displayed.</td>
</tr>
<tr>
<td></td>
<td>7. For this exercise, navigate back to the User menu using the yellow Exit arrow on the standard toolbar.</td>
</tr>
<tr>
<td></td>
<td>8. Click on the arrow next to the Role Z_HRBEN_CAMPUS_ADMINISTRATOR folder to collapse it.</td>
</tr>
</tbody>
</table>
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 several situations. *For example: you can view a report in one window and an employee’s record in the other window.*

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.

*A new session may be opened by using the **Create new session** button that is found on the Standard Tool bar.*
### PRACTICE

**OPEN AND CLOSE A NEW SESSION**

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

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

**Example of two open sessions**

![Example of two open sessions](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><strong>Close a second session</strong></th>
<th>A second session may also be closed from any screen in SAP.</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. Select the session that you want to close.</td>
<td></td>
</tr>
</tbody>
</table>
| 3. Follow the menu path: **System>>End Session**  
  Result: The additional session will close. |
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, PA30 (Maintain HR Master Data) or PO10 (Maintain Organizational Unit). 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. /nPA30) in the Command field on the Standard Toolbar.

Click the Arrow to open the Command field

Click on the Arrow to close the Command Field
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 **PA30** tells the system which transaction screen (**Maintain HR Master Data**) to view instead.

The default setting for MIT users is to Display technical names (transaction codes) next to each transaction name in the Navigation area. If you are looking for the transaction code for a particular function, you can find it 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 3 to change your settings so they are visible.*
**PRACTICE**

**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.

<table>
<thead>
<tr>
<th>Navigation</th>
<th>From wherever you are in SAP, follow the steps below.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter transaction code /n -- new transaction</td>
<td></td>
</tr>
<tr>
<td>1. In the command field, enter the transaction code: /npa30.</td>
<td></td>
</tr>
<tr>
<td>2. Click the <strong>Enter</strong> button, or press <strong>Enter</strong> on your keyboard.</td>
<td>SAP will leave the current transaction and take you to the <em>Maintain HR Master Data screen</em>.</td>
</tr>
<tr>
<td>Enter transaction code /o -- open new session</td>
<td></td>
</tr>
<tr>
<td>3. In the command field, enter the transaction code: /opa20.</td>
<td></td>
</tr>
</tbody>
</table>

*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 pa20 uses numeral zero.*

| 4. Click the **Enter** button, or **Enter** on your keyboard. | SAP will open a new session showing the *Display HR Master Data screen*. The previous transaction *Maintain HR Master Data screen* will remain open in the background session. |
| 5. Close the new session. | |
SELF-CHECK

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

Questions

1. Define prefix /n.

   

2. Define prefix /o.

   

3. Identify the indicated parts of the screen.

   a. 

   b. 

   c. 

   d.
## Answers to the Self-Check

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Ends the current transaction and switches to the new one <em>without saving</em> any data in the current transaction.</td>
</tr>
<tr>
<td>2.</td>
<td>Opens a new SAP session and accesses the new transaction <em>without ending</em> the current one (which will remain open in the background session).</td>
</tr>
</tbody>
</table>
|3. | a. Standard Toolbar  
|   | b. Application Toolbar  
|   | c. Screen Body  
|   | d. Status Bar |
Lesson 3:

END USER CUSTOMIZATION

In this lesson you will learn how to customize SAP for your individual needs. All customizing is optional, and all settings are recommendations only. You may customize screen colors, frequently used transactions, as well as specific user options.

OBJECTIVES

In this lesson you will learn how to customize certain screens and navigation shortcuts in SAP. At the completion of this lesson you will be able to:

✔ Create and use favorites
✔ Set and save specific screen options
✔ Set and save color settings
GETTING STARTED

CREATE AND USE FAVORITES

Favorites are shortcuts to your most frequently used transactions. You can create, change, and delete Favorites in any way that suits you without affecting the User menu or the SAP standard menu. Your created Favorites will carry over from the User menu to the SAP Standard menu.

Favorites allow you to get to those functions you use most often without having to navigate through the menu paths or enter transaction codes.
CREATE AND USE FAVORITES

Creating Favorites in the Practice environment will not carry over to Production. If you want to create Favorites in Production, you will have to repeat these steps in the Production environment.

<table>
<thead>
<tr>
<th>Navigation</th>
<th>Access the SAP User menu screen, if you are not already there. The Favorites folder is at the bottom of the Navigation Area</th>
</tr>
</thead>
</table>
| Create a Favorite | 1. From the SAP User menu screen, follow the navigation path: User menu  

Role_Z_HRBEN_CAMPUS_ADMINISTRATOR  

PA30 - Maintain HR Master Data  

2. Click and highlight PA30 - Maintain HR Master Data.  

3. On the toolbar, click the Add to Favorites button.  

4. Double-click on the new Favorite to go directly to the PA30 - Maintain HR Master Data transaction.  

5. Click the Exit button to return to the SAP User menu.  

Delete a Favorite | 6. Click and highlight the new Favorite.  

7. On the toolbar, click the Delete Favorites button.  

8. Your PA30 - Maintain HR Master Data Favorite is deleted. |
**Change a Favorite**

You can change the names of your Favorites to make them easier to identify on the screen.

> Completely changing the title of a favorite SAP transaction could cause confusion if business help is required, so we recommend that you simply delete the file path portion of the name with the exception of the transaction title. See the example below.

8. Recreate the Favorite **PA30 - Maintain HR Master Data** (or create a different Favorite) following the steps on the previous page.

9. Click once on the **PA30 - Maintain HR Master Data** Favorite to highlight it.

10. Follow the menu path at the top of the screen:

    Favorites >> Change

    The Change a favorite text box will appear.

11. Delete the menu path information while retaining the transaction title. The easiest way to do this is to highlight the text you want to remove and click delete on your keyboard.

    Change:

    **PA30 - Maintain HR Master Data**

    To:

    **Maintain HR Master Data**

12. Click the Continue button and see how the name of your Favorite has changed.

**Add a web address to Favorites**

This option provides a shortcut to frequently used web sites, such as the HR-Payroll Project web site.

13. Follow the menu path at the top of the screen:

    Favorites > Add other objects

    The Add additional objects selection box will appear.
14. Click the radio button next to **Web address or file**.

15. Click the **Continue** button.

   a. In the *Add a Web address or file path* pop-up box that appears, enter the following title in the **Text** field: **HR-Payroll home page**

   b. In the **Web address or file** field, enter: **http://web.mit.edu/is/delivery/hrpayroll/index.html**

16. Click the **Continue** button.

17. The web link will be added to your **Favorites folder**. To access the web site, simply double-click on the web link in the **Favorites folder**.
USER SETTINGS

Like any other software package, SAP is delivered with a particular series of settings that affect what each user sees on the screen. This section will describe some of those settings, indicate what the default settings are for MIT, and make a recommendation about whether you should or should not change these settings.

User Settings are formatting options that modify the look and feel of SAP. The Settings screen allows you to choose whether you see the water graphic in the work area of certain screens, whether transaction codes are viewed as part of each transaction title, where Favorites are placed on the custom SAP User menu as well as the SAP Standard menu, and whether all transactions or only Favorites are viewed.

For each of these settings we will provide a recommendation for how the setting should be used. It is important to remember that customizing User Settings is optional, and our recommendations are guidelines, not requirements.

Settings for the SAP User menu Screen

(1) Display favorites at end of list

The default for this setting is checked.
When this setting is checked, the Favorites folder is displayed below the User menu and SAP menu in the Navigation Area. If it is unchecked, the Favorites menu moves to the top of the display. You may check or uncheck this box according to personal preference.
(2) Do not display menu, only display favorites

The default for this setting is unchecked.
When this setting is checked, the Favorites folder is the only thing displayed in the Navigation Area, and the User and SAP menus are inaccessible. If it is unchecked, all menus are displayed. We recommend that you leave this box unchecked so that all menu options are still accessible.

(3) Do not display picture

The default for this setting is unchecked.
When this setting is checked, the water graphic on the right hand side of the Navigation Area will disappear. If it is unchecked, the water graphic is displayed. You may check or uncheck this box according to personal preference.

(4) Display technical names

The default for this setting is checked.
When this setting is checked, the transaction code is displayed next to each item on the User and SAP menus. If it is unchecked, the transaction code is not displayed. You may check or uncheck this box according to personal preference.

(5) Show first level

The default for this setting is checked.
When this setting is checked, the HR Role subfolder is displayed on the User menu. If it is unchecked, that submenu is not displayed. We recommend that you leave this box checked so that all menu options will display properly.
PRACTICE

In this exercise you will confirm your screen settings and change them if you wish.

Practicing customizing in the SF6 environment will not carry over to Production. If you want to customize your view in Production, you will have to repeat these steps in the Production environment.

Navigation

Access the SAP User menu if you are not already there.

1. From the menu bar at the top of the screen, follow the menu path:

   Extras >> Settings

   ![SAP User menu with Extras >> Settings highlighted]
**Confirm Settings**

As explained in the Getting Started section, the default menu screen settings (recommended settings) for MIT users are as follows:

- Display favorites at end of list *(check)*
- Do not display menu, only display favorites *(no check)*
- Do not display picture *(no check)*
- Display technical names *(check)*
- Show first level *(check)*

**Change Settings**

2. You may change any of these settings by checking or unchecking the boxes next to each item.

**Descriptions of Settings**

3. When you have checked and unchecked the settings according to your preference, click the **Continue** button 🔄 to activate your changes.

⚠️ You will be returned to the Navigation Area where you can view the results of any changes you might have made.
GETTING STARTED

Changing Color Settings
You may change your SAP color settings according to your preference.

SAP Color Settings are GUI specific. This means that they are attached to the software on the desktop computer you are currently using, not to your user profile. So if another user logs into SAP on your computer, your selected user settings will show. If you log into SAP at a different computer, your user settings will not be in effect.

On a PC, you can access color settings by clicking on the SAPgui Settings button at the bottom right of the Windows screen, on the task bar.

⚠️ The color setting button on a PC is located on the Windows task bar, not on the SAP screen.
CUSTOMIZE SAPGUI COLORS-SETTINGS

Navigation
Access the SAP User menu screen, if you are not already there.

1. Go to the lower right corner of the Windows Task bar.

SAPgui Settings
Dialog Box
2. Click on the SAPgui Settings button.

A SAPgui dialog box opens. This dialog box is used to specify general settings and color settings for SAP screens.

The dialog box consists of two tabs: General Settings and Color Settings.
3. Click and select any of the **General Tab** options that you choose to change:

- **Change the Theme** (for more contrast)
- **Change Font Size**
- **Enable Logon Video** (the water graphic on startup)
- **Turn the Sound on or off**

4. Click on the **Color Settings** tab.

5. Click and choose a **color theme** from the left side of the screen.

   > The color theme changed on the right side of the screen.

6. If you choose to restore your color to the original SAPgui color theme, click on the **Restore** button in the center of the screen.

7. Choose a **different color** theme from the left side of the screen.

8. Once you have selected the color scheme you like, click **OK**.

9. The colors of your SAP screen have changed.

   > Remember, these settings are GUI specific rather than user or environment specific - if another user logs into SAP on your computer, your selected colors will show. If you log in to SAP from a different computer, your custom settings will not be in effect.
Lesson 4:

SEARCH FUNDAMENTALS

This lesson introduces you to basic SAP search fundamentals, including the basic search screens and a variety of search functions that you will use frequently. SAP provides its users with powerful search options. Understanding the skills presented in this lesson is a necessary and useful tool for using SAP.

OBJECTIVES

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

- Use the Matchcode search function
- Recognize SAP search screen features
- Understand how and when to use the search functionality
GETTING STARTED

MATCHCODE SEARCH FUNCTION

In many cases, SAP requires the entry of a numerical code to pull up a personnel record, like a Social Security number or an MIT ID number to indicate the particular employee's record that you wish to look up. Because SAP users cannot remember all of these thousands of numbers or employee names, 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 a Matchcode Icon 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., Personnel Area (Figure 1)

✔ A graphical selection tool, e.g., a calendar to select a date

✔ A Search help selection window (Figure 2)

Figure 1
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 recall that there is an Employee whose Last Name contains the letters SMi but you are not sure of the full name, you can enter (*smi*) to search for the complete Last Name. SAP will give you a list of all the employees who s Last Name contains the letters SMi in them.

The Wildcard Search is a tool for finding possible matches, when you are not sure of the exact name or social security number.
MATCHCODE SEARCH FUNCTION
The following exercise demonstrates the use of the Restricted value range window.

**Navigation**

Access the SAP User menu screen, if you are not already there.

1. From the SAP User Menu screen, follow the navigation path:
   - User Menu
     - Role Z_HRBEN_CAMPUS_ADMINISTRATOR
     - PA-20 Display HR Master Data (double-click).
   
   The Display HR Master Data Initial Screen is displayed.

2. Click on the Matchcode button to the right of the Personnel No. field (on the right side of the screen).

**Restrict Value Range**

- Restricting value ranges allows you to pull up the correct employee record.

3. Click on the Tab List button in the upper right corner of the dialog box. Listed are the possible search criteria, you may choose to search by Name, Social Security number or MIT ID.
4. Select: **N: Last name - First name**

Once you select **N: Last name-First name** as your search criteria, it will become your default search criteria until you change your selection.

5. Enter the following information:

   Last Name: *smi* *(include the asterisks *)

6. Click the **Continue** button.

On the Hit List all of the Last names with the letters (SMI) are listed.

7. Double-click on the correct name (pick a random name) in the list. You will return to the previous screen with the personnel number entered in the field.

8. Click the **Enter** button (top left corner of the screen), in order to pull the data attached to that record.

You can also search by Last, First name, show Middle Name for those employees that are identified by their Middle Name.
### MATCHCODE SEARCH FUNCTION

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.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>If you are already at a search screen continuing from the previous Practice, skip directly to <strong>Step 2</strong>.</td>
</tr>
<tr>
<td>1.</td>
<td>From the SAP User menu screen, follow the navigation path:</td>
</tr>
<tr>
<td></td>
<td><strong>User Menu</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Role Z_HRBEN_CAMPUS_ADMINISTRATOR</strong></td>
</tr>
<tr>
<td></td>
<td><strong>PA - 20 Display HR Master Data (double-click).</strong></td>
</tr>
<tr>
<td>2.</td>
<td>Click on the Matchcode button 🎬.</td>
</tr>
<tr>
<td>3.</td>
<td>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>Select: <strong>N: Last name - First name.</strong></td>
</tr>
</tbody>
</table>
**Selection Options**

In this scenario, you are looking for all the employee records that are greater then or equal to (alphabetically) the letter X.

5. Click on the **Selection Options** button.

6. Select the **Greater than or Equal to** button.

7. Click the **Continue** button.

8. Click on the **Last Name** field and type: X

9. Click the **Continue** button and SAP returns a Hit list of all employees with names that begin with X - Z.

10. Click the **Exit** button to return to the **Display HR Master Data screen**.
USING THE OBJECT MANAGER

The Object Manager portion of the screen is used for pulling up and managing individual employee records as well as group records. Records can be sorted by Name, Personnel Area, Personnel Number, as well as other groupings.

The search can be done in the Find by field using the three search options: Collective search help, Search term, and Free search.

In this self-study we will be using the Collective search help to run our employee searches. Once the employee records are found, they are placed in the Object Manager portion of the screen and can then be sorted based on the search criteria. The individual employee Infotype/Subtype information can be updated and viewed from the screen body (right side of the screen).

In order to replace or change employee records in the Object Manager, you need to run a different search and replace the current records with different employees records.

The powerful search options can be useful in identifying employees with similar names or the same name as well as groups of employees from the same Organizational Unit (department).
PRACTICE

USING THE OBJECT MANAGER

The following exercise demonstrates some of the search options that are found in the Object Manager. As you become familiar with SAP as a tool, you may discover other ways of customizing your searches.

<table>
<thead>
<tr>
<th>Navigation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access the <strong>SAP User menu</strong> screen, if you are not already there:</td>
</tr>
</tbody>
</table>

1. From the **SAP User menu** screen, follow the navigation path:
   
   **User Menu**
   
   ▼
   
   **Role Z_HRBEN_CAMPUS_ADMINISTRATOR**
   
   ▼
   
   **PA - 20 Display HR Master Data** *(double-click)*.

   The **Display HR Master Data Initial Screen** is displayed.

2. Click on the **Collective search help** in the **Object Manager**.

   ![Collective search help](image)

3. If **N: Last name - First name** is not the selected tab, Click and select it from the **Tab List**.

4. Enter the following information:

   **Last Name**: **white**.

   *SAP is not case sensitive.*
5. Click the Continue button.

6. All of the employees with the Last Name **White** will appear in the Object Manager.

⚠️ Once you have a list of employee records in the Object Manager, you are able to sort them based on your requirements.

7. Click on the **Configuration** button.

8. Select **Personnel Area** and **Name**.
9. Click the **Continue** button.

10. The names in the Object Manager will appear sorted by **Name** and **Personnel Area**.

    *Feel free to try different sort options, depending on your needs.*

11. Double-click on an employee name in the **Object Manager** in order to view the employee’s Infotype/Subtype information in the screen body.
**SELF-CHECK**

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

<table>
<thead>
<tr>
<th>Questions</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1  Using the <strong>Matchcode search</strong> locate your Personnel record in SAP. What is your Personnel no.? __________________</td>
<td></td>
</tr>
<tr>
<td>2  In <strong>Object Manager</strong> run a search for employees with the last name:  <strong>gray</strong></td>
<td></td>
</tr>
<tr>
<td>3  Sort all of the records that are found in <strong>Object Manager</strong> by: <strong>Name</strong> and <strong>Employee Group Name</strong>.</td>
<td></td>
</tr>
</tbody>
</table>
Lesson 5:

LOG OFF SAP

OBJECTIVES
In this lesson you will exit the SAP practice environment. At the completion of this lesson you will be able to:

✔ Log off the SAP practice environment (sap-edu)

✔ Destroy your Kerberos ticket

SUMMARY OF BUSINESS RULES
It is important to remember to log off when you are not using the SAP system as it contains confidential business information.

⚠️ The SAP Production system will automatically log you off after two hours without activity, but it is recommended that you log out if you plan to leave your work area for an extended period of time.
# LOG OFF THE SAP PRACTICE ENVIRONMENT

## Log Off SAP

1. From the menu bar at the top of the screen, follow the menu path:
   - **System >> Log Off**
   - ![Log Off Dialog Box](image)
   - Unsaved data will be lost.
   - Do you want to log off?
   - Click the **Yes** button.

## Destroy Your Kerberos Ticket

2. Click the **Yes** button.

3. Click **Leash32** on the **Windows Task bar**.
   - This will open the **Leash32** screen.
   - ![Leash32 Screen](image)

4. Click on your ticket, then click the **Destroy Ticket(s) button**.

5. Click **OK**.

6. Click the **Close** button in the upper right corner of the Kerberos window.

*It is not necessary to destroy your ticket if you will be utilizing other Kerberized systems (such as Eudora) after logging off SAP.*
Appendix:

SAP TERMINOLOGY

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

As you gain more understanding and familiarity with SAP, you will also become more comfortable and knowledgeable in SAP terminology.

Below is some SAP terminology that will be used throughout training and additional terminology may be introduced as needed. The terminology is divided into three sections: System Terminology, HR - Payroll Terminology, and Financial Terminology.

SYSTEM TERMINOLOGY

<p>| Environment: | An SAP environment is a completely self-contained version of the SAP database, designated for a specific purpose. For example, at MIT there is a Production environment and a Training environment, as well as others for testing and development. |
| GUI: | 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. |
| Master Data: | Master data is a collection of information about a person or an object, e.g. a personnel record or health plans. For example, a health plan master record contains not only general information such as the plan name and plan address, but also specific information, such as annual enrollment fee. |
| Transactional Data: | Data that is related to a single business event. Whenever you complete a transaction in SAP, you are creating Transactional Data. |
| Authorization: | Permission for a person to perform certain SAP functions. |
| User Profile: | An SAP user profile characterizes the type of work or authorizations that the user is allowed to perform in SAP. |
| Transaction Code: | A unique command (short-cut) 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 HR Master Data is PA20. |
| Configuration: | Configuration is the process of setting up SAP to match MIT's business processes. It allows us to create screens that will collect and display only data relevant to MIT. For example, Sap is configured to check employee benefit eligibility requirements. |</p>
<table>
<thead>
<tr>
<th><strong>Data Warehouse:</strong></th>
<th>The Data Warehouse is a central repository of data that provides the MIT community with integrated, up-to-date data from various administrative systems. Using a reporting tool called BrioQuery, you can select and download the data into a report.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Audit Trail:</strong></td>
<td>History of SAP records that includes dates, person who entered the record, changes made to the record, etc.</td>
</tr>
<tr>
<td><strong>Workflow:</strong></td>
<td>A routing tool in SAP that forwards documents for review or approval or notification.</td>
</tr>
</tbody>
</table>
### HR - PAYROLL TERMINOLOGY

<table>
<thead>
<tr>
<th>Infotype:</th>
<th>A group of related data fields, which provide structure for certain information, facilitate data entry, and allow storage of data. Example: Address Infotype, Personal Data Infotype, and Organizational Assignment Infotype.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Infotype Subtype:</td>
<td>Separate categories of information that exist within a particular infotype. For example infotype 1006 (Addresses) has three subtypes: 1) home, 2) office and 3) alternate office. Subtypes can vary from one kind of infotype to another.</td>
</tr>
<tr>
<td>Action:</td>
<td>A grouping of <em>Infotypes</em> created to make data entry easier. Instead of accessing each Infotype individually and entering data into them, Infotypes can be grouped together. Each Infotype can be grouped into many different actions, and each action can have its own unique sequencing of Infotypes. Example: Hiring Action</td>
</tr>
<tr>
<td>Enterprise Structure:</td>
<td>Allows for the ability to group employees by their relationship within the company, their status, and their payroll processing. Consists of three indicators: employee group, employee subgroup and payroll accounting area. For example, one employee group is exempt.</td>
</tr>
<tr>
<td>Personnel No:</td>
<td>An SAP generated number identifying each individual. It is not a social security number or an MIT ID number.</td>
</tr>
<tr>
<td>Organizational Unit: (Department)</td>
<td>An Organizational Unit is part of MIT’s hierarchical structure that is already in use in SAP and other IS systems. Organizational Units support integrated reporting across multiple structures and systems. For example, an employee’s home department or their Organization Unit can be Human Resources.</td>
</tr>
<tr>
<td>Object:</td>
<td>Objects are the basic elements of information that collectively make up, or define, an organizational plan. Example: Org. Units, Jobs, Positions.</td>
</tr>
<tr>
<td>Job:</td>
<td>A Job is a general description of a Position and can have many Positions associated with it. It is a classification of activities which define a set of tasks, e.g. manager, supervisor.</td>
</tr>
<tr>
<td>Position:</td>
<td>A breakdown of a Job that is performed by an individual and may include specific tasks in addition to the job description, e.g. HR Manager, Manager of Accounting. A Position is a specific slot or employee assigned within an organization, it may be vacant or obsolete. A Position is linked to only one job and exists regardless of whether or not it is occupied.</td>
</tr>
</tbody>
</table>
# Financial Terminology

| **Cost Object:** | 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). *(Cost Objects were called Cost Collectors by MIT before SAP.)* |
| **Cost Center:** | General or operating Cost Objects are known in SAP as Cost Centers. Cost Centers are budgeted on the fiscal year. *(Cost Centers were called General Accounts.)* |
| **Internal Order:** | 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. *(Internal Orders were called Fund Accounts.)* |
| **WBS Element:** | 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. *(WBS Elements were called Research Accounts.)* |
| **Profit Center:** | A unit in accounting which has responsibility for the cost centers, internal orders, and projects associated with it for the purpose of internal control and analysis. *(Profit Centers were called Department Numbers.)* |
| **G/L Account:** | 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. |
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. Define the term **Infotype**.

   _________________________________________________
   _________________________________________________
   _________________________________________________

4. What is the difference between a **Job** and a **Position**?

   _________________________________________________
   _________________________________________________
   _________________________________________________
   _________________________________________________

4. Define the term **Action** and list an example of an Action in SAP.
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. An **Infotype** is a group of related data fields, which provide structure for certain information, facilitate data entry, and allow storage of data. (a screen of data information)

4. A **Position** is a breakdown of a **Job** that is performed by an individual and may include specific tasks in addition to the job description, e.g. HR Manager, Manager of Accounting. A **Job** is a general description of a **Position** and can have many **Positions** associated with it.

5. An **Action** is a grouping of Infotypes created to make data entry easier. Instead of accessing each Infotype individually and entering data into them, Infotypes can be grouped together. Example: Telephone Directory Action.
NOTES: