

# SAP Procedures for Getting Started in SAP - Finance

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# SAP Procedures for Getting Started in SAP - Finance

## Logging On

### 1. Access SAP

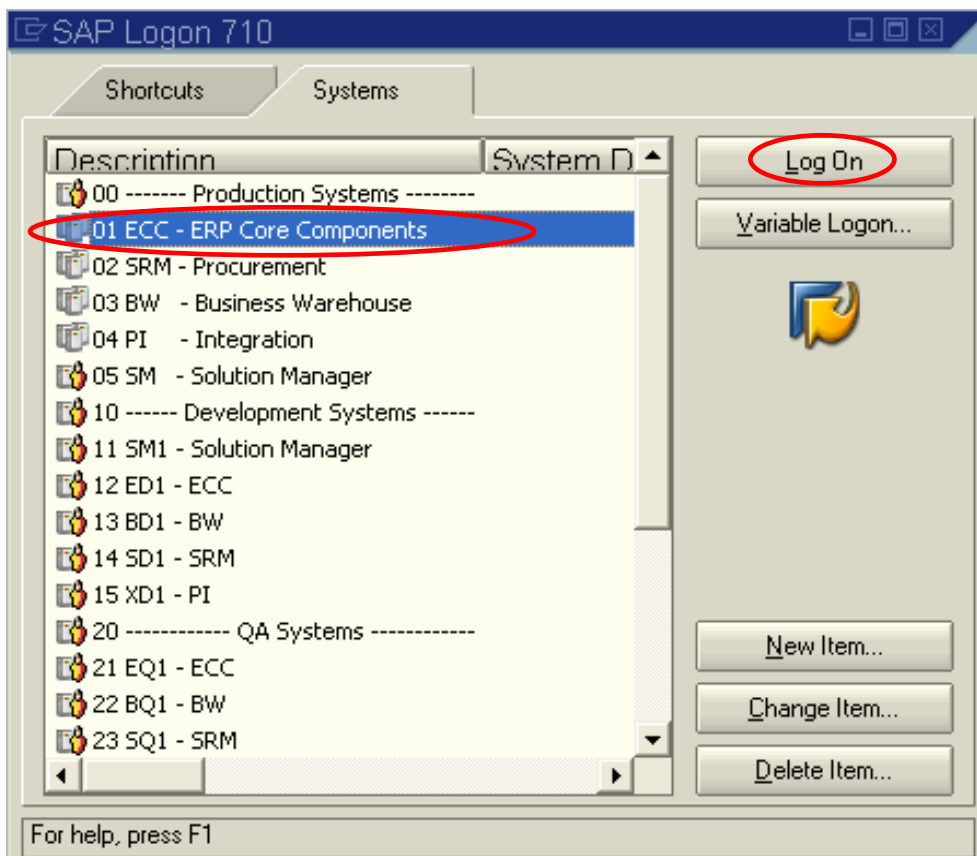


- double click on this icon on your desktop

It is the responsibility of all users to ensure that the SAP system is used solely for its intended purpose and in accordance with the policies and procedures of Derbyshire County Council. Any deliberate misuse of the system could constitute a disciplinary offence.

### 2. Select the SAP version to be used

On the screen that appears, **always** select “01 ECC – ERP Core Components” (highlighted below) and then click “Log On”:



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## 3. Enter Log On details

The screenshot shows the SAP Log On interface. At the top, there is a menu bar with 'User', 'System', and 'Help'. Below it is the SAP logo and a 'New password' button. The main form contains fields for 'Client' (pre-filled with '400'), 'User' (pre-filled with '12345678'), 'Password' (masked with asterisks), and 'Language'. A 'Log On' button with a green tick icon is circled in red. Callouts provide the following information:

- Client:** Pre-populated. The client code will always default to 400, which is the Live Client.
- User:** Enter your employee number as your User ID. Your User ID has been customised – it will only allow access to those parts of the system that are appropriate for your use. If you attempt to access a part of the system for which you do not have access rights, an error message will appear.
- Password:** Enter password. The system will force a password change after the first Log On. Refer to the guidance below regarding setting passwords.
- Log On Button:** Click on the green tick (circled above), once you have entered your User ID and password. Alternatively, press enter.

Information on the right side of the screen includes: 'Welcome to the Derbyshire County Council SAP ECC 6.0', a warning 'ONLY LOG ON IF YOU ARE AN AUTHORIZED USER !!', and 'Available Clients: 400 - Production Master'.

Click on the green tick (circled above), once you have entered your User ID and password. Alternatively, press enter.

### Passwords in SAP

Passwords are required to be “strong” i.e. they **must** contain a:

- minimum of 7 characters.

At least 3 from:

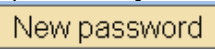
- uppercase character(s) (A-Z);
- lowercase characters(s) (a-z);
- non-alphabetical character(s) (e.g. !,\$,&,%); and
- numerical character(s) (0-9).

An example using the above required combination is P@55word.

In general your password should not be:

- a word in any language (including jargon, slang, dialect);
- based on personal information (e.g. your name, names of family, pets, co-workers, key dates, addresses etc).

The system will prompt a change every 42 days. Passwords may be changed more frequently (but not within 2 days). Enter your user ID and current password and then click the following icon on the Log On screen:



Your 5 previous passwords are remembered and may not be reused.

After 5 invalid access attempts your account is locked.

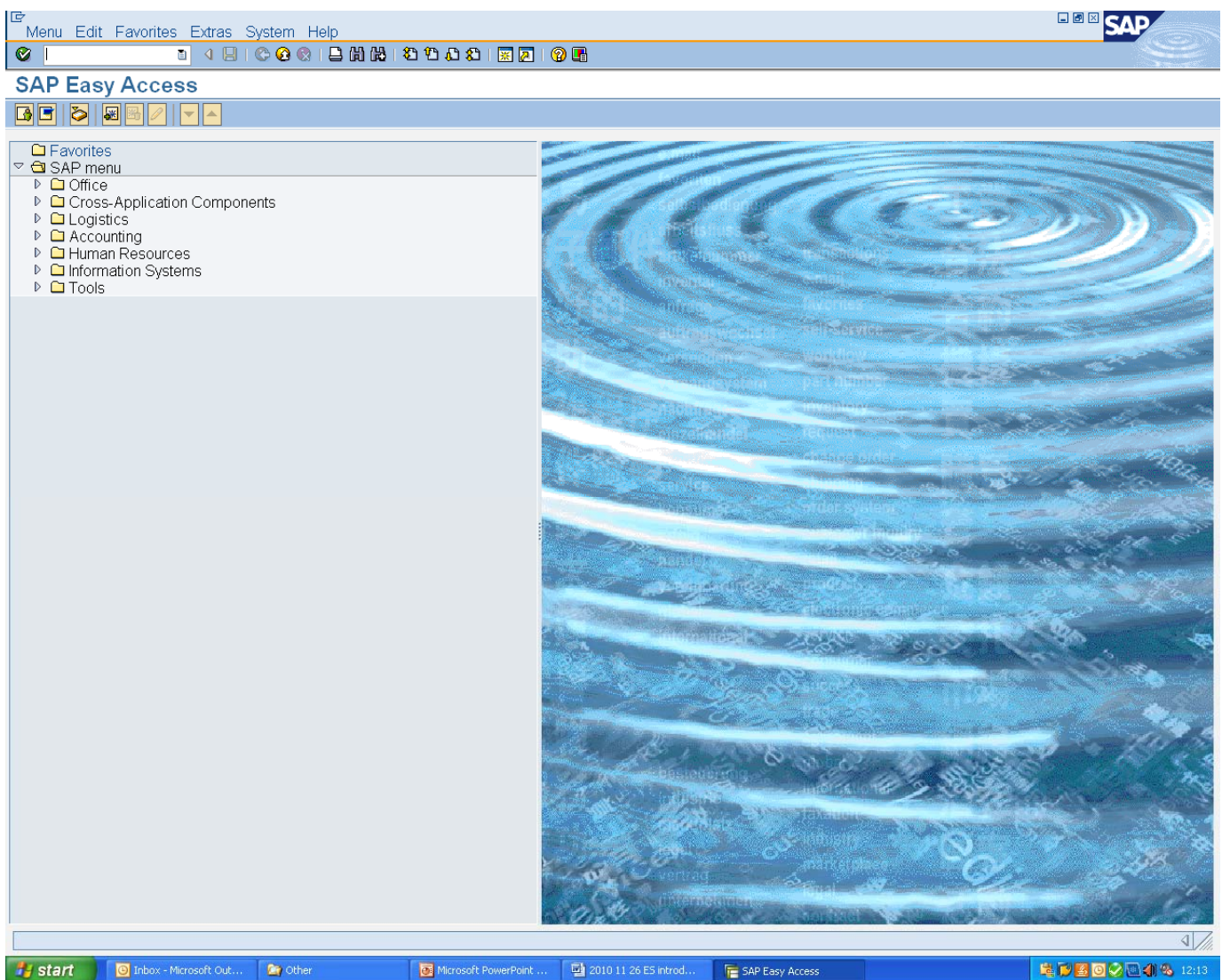
Passwords must be re-entered after a 30 minute period of inactivity in SAP.

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Key points to remember are:

- Don't reveal a password over the telephone to ANYONE.
- Don't write passwords down and store them anywhere in the office, or on-line.
- Don't reveal a password in an e-mail message.
- Don't reveal a password to a Line Manager.
- Don't talk about a password in front of others.
- Don't hint at the format of a password.
- Don't reveal a password on questionnaires or security forms.
- Don't share a password with family members.
- Don't reveal a password to co-workers whilst on holiday.

## 4. User Menu appears



Navigating from this User Menu is explained in Section B below.

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## Navigating

### Menu Tree and Transaction Codes

Each operation in SAP has a name and a transaction code.

Operations may be accessed by either:

- using the menu tree - clicking on the arrow on the left of the screen and following the path of arrows to arrive at the particular operation name; or
- entering the transaction code directly.

### Accessing from the main User Menu screen

The screenshot shows the SAP Easy Access main screen. At the top, there is a menu bar with 'Menu', 'Edit', 'Favorites', 'Extras', 'System', and 'Help'. Below the menu bar is a search box. A callout points to this search box with the text: "Enter transaction code here, if known, then press enter, or click the green tick. This method is quicker, if you know the transaction you need." Below the search box is a toolbar with several icons. A callout points to the second icon (a blue square with a white document) with the text: "Alternatively, use these arrows to navigate through the menu tree options to find an operation (transaction). Double click on the required transaction." Below the toolbar is a menu tree. A callout points to the 'Accounting' folder with the text: "Alternatively, use these arrows to navigate through the menu tree options to find an operation (transaction). Double click on the required transaction." To the right of the menu tree is a large blue graphic. A callout points to this graphic with the text: "If the main User Menu drop-down list does not appear in this format, ensure the second icon is selected. It is likely that the first icon has been selected by mistake."

For example, to access the operation FV50 – “Edit or Park G/L Document”, either type FV50 in the top box, or navigate through the arrows as follows: Accounting>Financial Accounting>General Ledger>Posting, highlighting “Edit or Park G/L Document”.

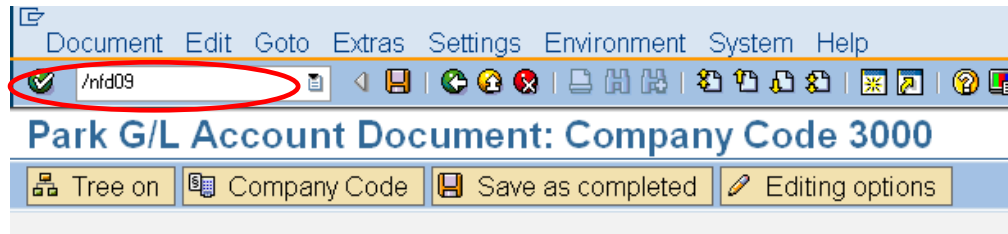
The screenshot shows the SAP Easy Access main screen with the menu tree expanded. The search box at the top contains 'FV50'. The menu tree is expanded to show the following path: Accounting > Financial Accounting > General Ledger > Posting. The 'Posting' folder is expanded, and the transaction 'FV50 - Edit or Park G/L Document' is highlighted in yellow. Other transactions listed under 'Posting' include: FB50 - Enter G/L Account Document, FB50L - Enter G/L Account Document for Ledger Group, F-02 - General Posting, FB01L - Enter General Posting for Ledger Group, FV50L - Park G/L Account Document for Ledger Group, and F-65 - General Document Parking.

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## Accessing from a screen other than the main User Menu screen

If you are not in the main menu screen and know the transaction code you require, type **/n** followed by the transaction code.

For example, to access transaction FD09 from FV50, enter **/nfd09** in the highlighted box:



To go to a new transaction but without closing the current session, type **/o** followed by the transaction code. The transaction code requested will be accessed in a new session.

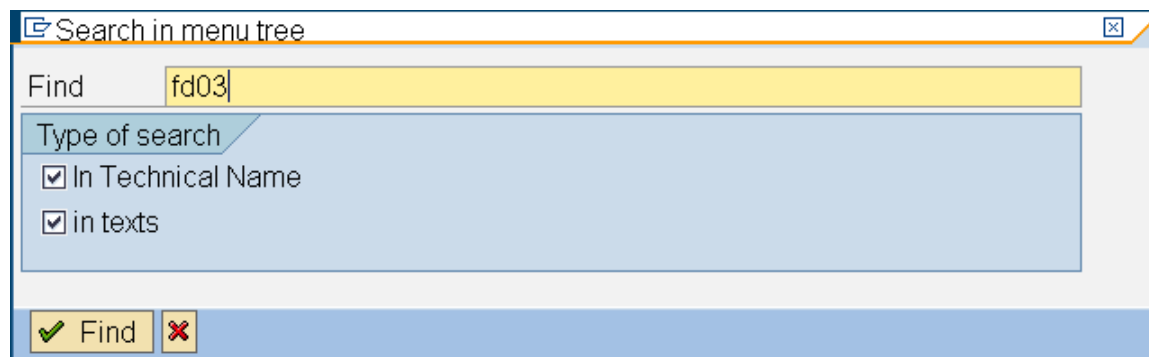
Type **/n** on its own to return to the main user menu.

## Finding a transaction path

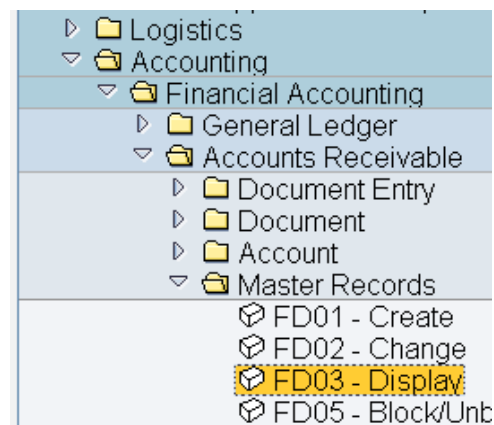
To find a transaction path, click on the "Find" icon:



Enter the transaction code in the box and select find, or press enter:



The transaction path in the menu tree is displayed:

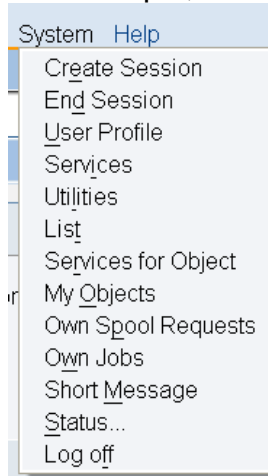


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## Top Toolbar

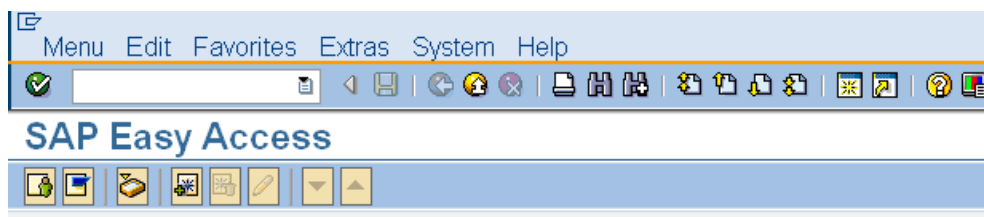
On the toolbar of every screen, there are a number of drop-down menus.

For example, this is the drop-down for the **System** menu:



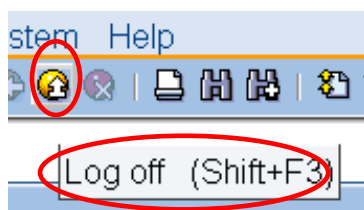
## Icons

Alternatively, the mouse may be used to access icons on the toolbar:



Obtain details of the use of an icon by hovering over it. If a Function Key (F), Shift Key (Shift) and/or Control Key (Ctrl) is also displayed, this is an alternative means of navigation.

For example, log off from the main User Menu screen is also accessible by using the shift key at the same time as pressing F3:



Icons may change their use, depending on which screen they appear.

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Common icons and their descriptions are listed below:



Enter



Save (or Post)



Back



Exit (or Log Out from main User Menu)



Cancel



Print



Execute



Find



Find Next



First Page



Previous Page



Next Page



Last Page



Creates New Session

This allows multiple windows to be opened at the same time. It is particularly useful if you have a report to run and want to carry on using SAP, or if you want to compare two or more items.



Creates Shortcut



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Help



Layout Menu



Services For Object



Change Display/Change Mode



Display Another Document



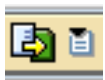
Display Document Header



Sort in Ascending/Descending Order



Filter



Export



Choose Layout



Get Variant

## Right Mouse Key

From any SAP screen, the right mouse button can be used to display the options available for that screen.

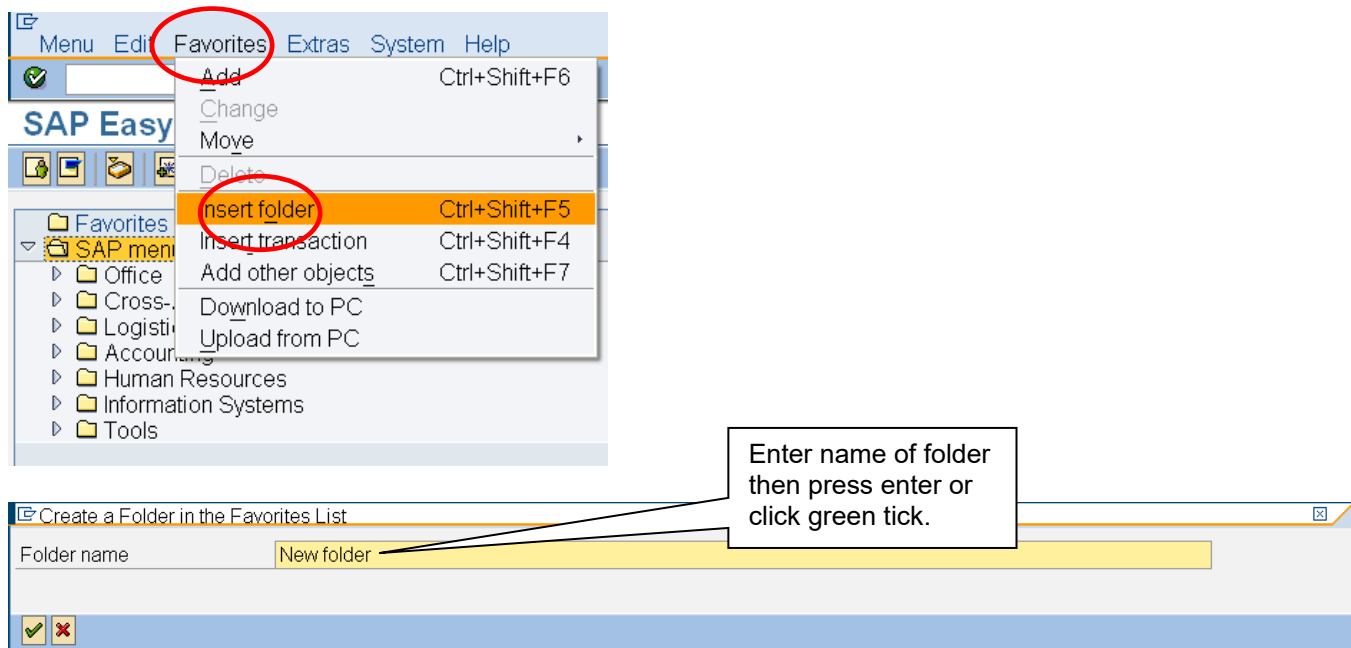
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## Favourites

In the main User Menu screen, it is possible to create a list of your own “favourite” transactions, to avoid going through the menu tree for access, or typing in the transaction code every time. This speeds up access and is useful if the transaction is one you are unlikely to remember, for instance if you use it infrequently or the code is long.

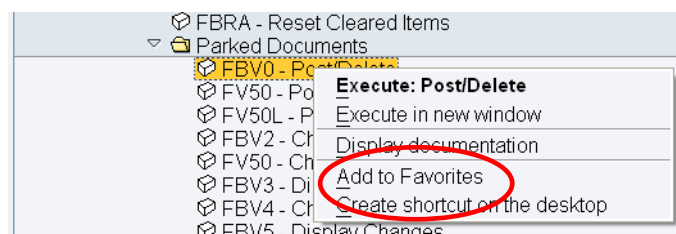
## Folders

To insert a folder to organise your favourites, click Favourites>Insert Folder:



## Add an Item

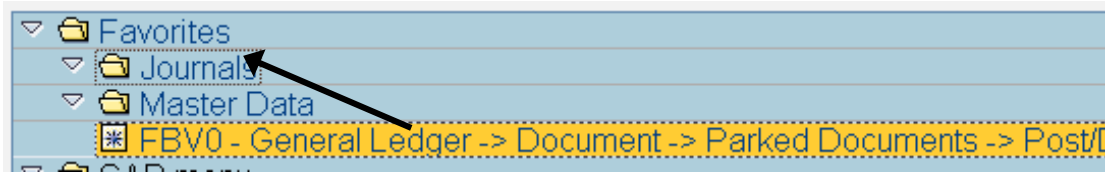
To add an item to your favourites, find the transaction using the Menu Tree. Drill down through the arrows and right click on the required transaction once you have located it. Select add to favourites:



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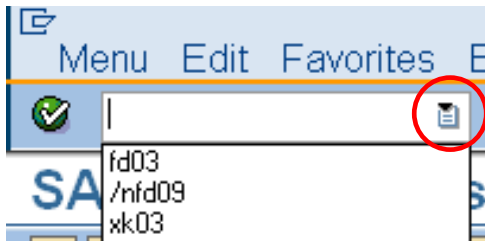
## Moving Items

Transactions may be moved around within favourites by dragging and dropping into the folders set up, as described above:



## Most Recent Transactions

Your most recently used transactions are stored in SAP. To access them click on the file icon at the right hand side of the toolbar command box and select the required transaction from the drop-down list:



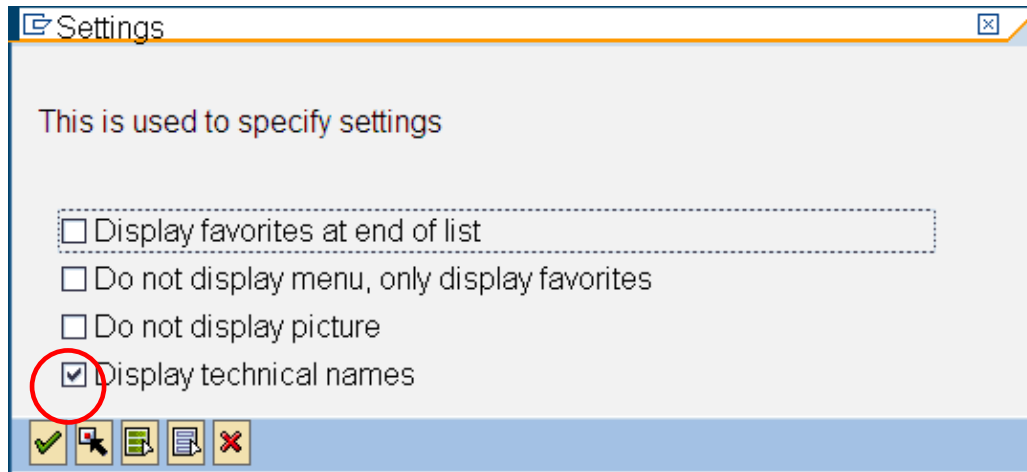
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## Settings

SAP settings may be modified further. These will be retained between Log Ons.

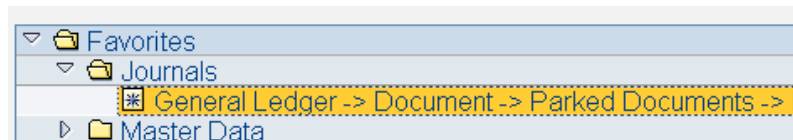
### Display Transaction Code

Select Extras>Settings from the top tool bar. A dialogue box appears as shown:

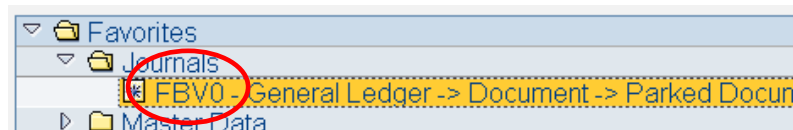


By selecting the “Display technical names” option and clicking the green tick, or pressing enter, the technical name (transaction code) of every transaction will be added on to its description in the menu tree.

Before -



After -

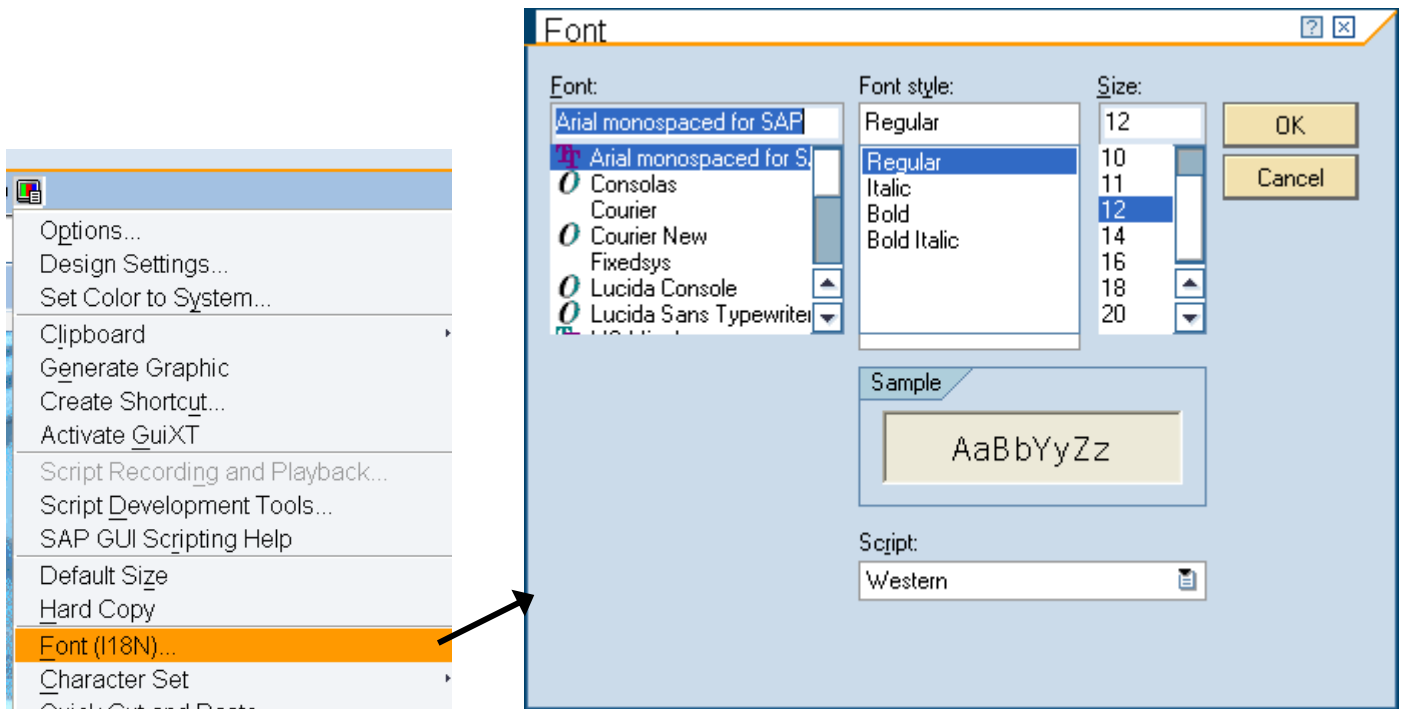


## Modify Font Size

The font size of the SAP screen may be increased to make it easier to see.

Select the “Customise local layout icon”  and select “Font” from the drop-down list:

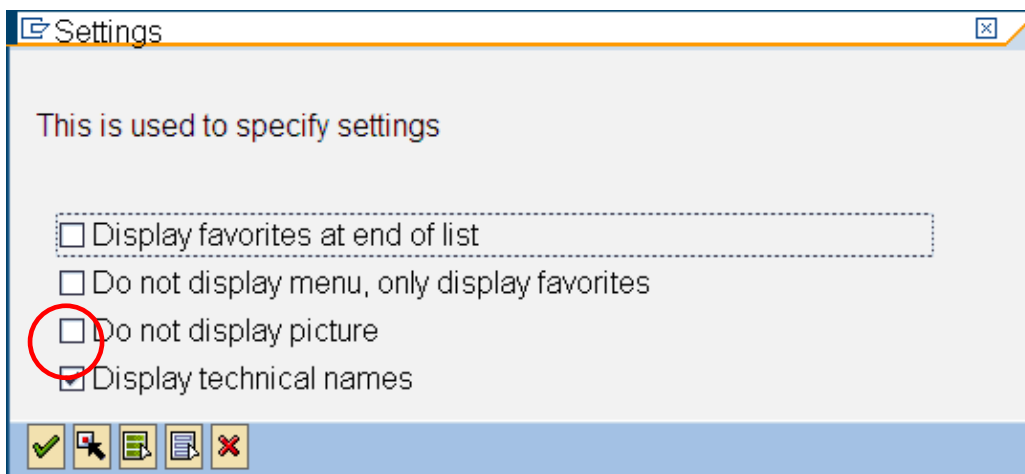
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After making the appropriate font selections, select OK.

### Remove SAP Picture

Select Extras>Settings from the top tool bar. A dialogue box appears as shown:



Selecting the “Do not display picture” option removes the SAP “Pool Picture” on the right of the main User Menu.