90 Tips & Tricks Every SAP Super User Should Know

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SAP System Provided by: Configurable Management
SAP (Systems, Applications, and Products in Data Processing): The software application known as SAP is part of a category of software known as Enterprise Resource Planning (ERP) software. ERP systems integrate business processes and various business tasks across functional areas into one system.

SAP = name of the company.
R/2, R/3, ERP, S/4 = name of software.
**SAP Portal** provides a single point of access to SAP and non-SAP sources through a web browser. This can be used by employees, customers, partners, and suppliers.
Tip 3 – Key Terms

- SAP
- SAP Portal
- SAP GUI
- SAP Instance
- SAP Client
- SAP Session

**SAP GUI (Graphical User Interface):**

SAP GUI is the local computer application used to access the SAP transactions and data.
**SAP Instance:** Used interchangeably with "server" or "application server" in the SAP system, instance is the server used to run SAP. The instance is a self-contained version of the SAP database containing all clients, customers, materials, and other data necessary to perform all transactions.
**SAP Client**: A self-contained unit in the SAP system. A client has its own transaction data and its own set of tables but share the transactions applications with other clients in the same instance.

You do your daily work in a specific client within your Production system.
SAP Session: An active SAP connection in which a transaction can run. Users can open up to six sessions at a time.
There are commonly two ways to access SAP:

- SAP Portal
- SAP GUI
Tip 8 – Logging Off

On the main menu bar

- Click **System**.
- From the drop-down menu, select **Log off**. The log off confirmation box displays.
- Make sure there is no data that needs to be saved, then click **Yes**.
Easy Access Screen

Where you start every session and is the primary user navigation area.

Consider this the equivalent of a main menu.
Transaction

A business function program. Executing transactions in SAP creates the day-to-day working data (e.g., a purchase order, a sales order, etc.) and the data is exchanged between SAP modules.
Tip 11 - Key Terms

- Easy Access Screen
- Transaction
- Toolbar
- System Message

**Toolbar**

A grouping of control functions. Controls that are typically included are buttons (with text or icon).
System Message

Information provided to the user concerning the transaction being executed.

There are three types:
1. Information/confirmation,
2. Warning,
3. Error messages that must be corrected in order to proceed.
The **Menu Bar** identifies the functions available within the current task. The menu options change based on the current transaction and screen within the transaction.
The **Standard Toolbar** contains buttons used to execute the most common tasks in SAP, including the **Command field**, **Save**, **Back**, **Cancel**, **Exit**, **Find**, **First Page**, **Previous Page**, **Next Page**, **Last Page**, **Create a New Session**, **Generate a Shortcut**, **Help**, and **Customizing the Local Layout**.

- The **Command field** is used to access transactions.
- Buttons on the **Standard Toolbar** are grayed out if that function is not available on the current screen.
The **Title Bar** displays directly below the **Standard Toolbar**. When processing a transaction, the **Title Bar** displays the current task name.
The **Application Toolbar** contains shortcut buttons to access commonly-used functions for the currently active SAP area. The toolbar content changes as you access different areas of SAP.
The SAP Menu is available only on the SAP Easy Access screen. It is used to navigate to specific SAP transactions.
The **Status Bar** displays system information on the lower-right side of the screen and system messages on the lower-left side of the screen.
The **Status Bar** displays system information and system messages.

Click the **Expand** button (drop-down arrow) in the lower-right corner of the screen to display system and client information, the session number in which you are currently working, the current transaction or screen, and other information.
There are three types of system messages in SAP.

- **Stop** - Identifies an incorrect entry in the system
- **OK** - Identifies affirmative system messages
- **Warning** - Identifies information that may be an error
The alpha-numeric code that we all know and love ☺ as transaction code. Ex: MM01
Tip 22 - Key Terms

Favorites

Favorites allow you to store transactions and frequently-used paths as well as folders, files, and links to the Internet.
User Profile

Displays a subset of the attributes stored for a user.
Tip 24 – Display Technical Names

- The Menu Path is used to navigate to specific SAP transactions.
- By default, SAP displays the text name for transactions but not their associated transaction codes.
Tip 24 – Display Technical Names...

To display the transaction codes:
- From the SAP Easy Access screen, on the **Menu Bar**, click **Extras**.
- From the drop-down menu, select **Settings**.
- On the **Settings** pop-up box, select the **Display technical names** checkbox.
- Click the **Enter** button to continue.
The transaction codes display before the transaction names.
Tip 25 - Maintain Favorites

3 ways to add a transaction to the Favorites folder:

- From the **SAP Easy Access** screen, follow the menu path **Favorites > Add**.
- Click and drag the transaction from the **SAP Menu** path and drop it in the **Favorites** folder.
- **Right-click** the transaction and select **Add to Favorites** from the context menu.
To edit your own data:

From the menu bar, select **System > User Profile > Own Data**. The **Maintain User Profile** screen displays.

There are 3 tabs:
- Address
- Defaults
- Parameters
Tip 27 - Maintain User Profile...

Address tab contains user information like name, location, phone, and email address.
Tip 28 - Maintain User Profile...

Defaults tab is used to select SAP settings.

- **Start menu** – used to specify a custom default menu.
- **Logon Language** – defaulted by system.
- **Decimal Notation**, **Date Format**, and **Time Format** – set to match the area where you do business.
- **Spool Control** – printer setup.
- **Personal Time Zone** – set your time zone if it differs from the computer’s.
Parameters tab is used to store default values in SAP. For example, if you always want to default a company code in the vendor search screen, then you can set that on the Parameters tab.

- The first step is to find the Parameter ID. You do that using a transaction that has the field you want to default.
Tip 30 - Maintain User Profile...

Parameter IDs

- Click in the field you want to default, and then press [F1].

- The Help screen for the field displays. Click the **Technical Information** button.

- Locate the **Parameter ID**. For this field, it is **BUK**.

- Close all screens and return to the **Maintain User Profile** screen.
Type the parameter ID ("BUK" in this case) in the Parameter ID field.

Type the company code (in this case 1020) in the Parameter value field.

Click the Enter icon on the main toolbar to complete.

Company code 1020 is now defaulted every time you use a transaction that contains the Company Code field.
Menu Path

The sequence of selections necessary to choose a specific operation or transaction.
Tip 33 - Key Terms

Menu Path
Command Field
Input Field
Display Field

Command Field

An input field located to the right of the Enter icon in the Standard Toolbar. It is used to enter a transaction code and call a transaction without having to drill down through the SAP Menu.
Tip 34 - Key Terms

Menu Path
Command Field
Input Field
Display Field

Input Field

Consists of a field name and an input area. You can enter and edit text in the input area.
Tip 35 - Key Terms

**Display Field**

A field that can be viewed but not edited. A display field is generally grayed out.
There are two additional ways to access transactions in SAP:

- Select the transaction from the SAP Menu.
- Enter the transaction code in the Command Field on the Menu Bar, and then click the Enter button or press [Enter] on the keyboard.
There are 2 types of fields on all SAP transaction screens.

- **Input** fields generally have a white background and accept data entry.
- **Display** fields are generally grayed out and do not allow data entry.
Input fields have three types of field entries:

- **Required** fields must be completed to continue or save the transaction.
  - System-required fields are denoted with a checkmark.
  - Business-required fields may not have indicators.
- **Optional** fields do not have to be completed to save the transaction.
- **Conditional** fields are also not required except in certain cases where another entry makes it required.
Tip 39 – Checkboxes vs. Radio Buttons

- **Checkboxes** can be used to select multiple items from a list.
- **Radio buttons** are used to select one and only one item from a list.
Matchcode

ALV Grid Control

**Matchcode**

Enables quick searching for master or transactional data through the database by narrowing the search criteria. Fields that contain a matchcode search display a drop-down arrow.
The ALV Grid Control (ALV = SAP List Viewer) is a flexible tool for displaying lists. The tool provides common list operations as generic functions and can be enhanced by self-defined options. This allows you to use the ALV Grid Control in a large range of application programs.
There are 3 categories of matchcodes:

- **Possible Entries:** A fixed list for input, listed on one screen.

- **Restrict Value Range:** Many entries for a field, with tabbed screens to enter search criteria.

- **Calendar Search:** A calendar dialog box enables you to select the day, month, and year.
Wildcards allow you to search text fields for partial matches. Wildcard characters take the place of letters or numbers.

The most common wildcard is the asterisk (*).

`Pet*` returns entries starting with “pet”
`*pet` returns entries ending with “pet”
`*pet*` returns entries containing “pet”
To avoid searching through the entire list, add any commonly used search results to a Personal List.
Many transactions provide an extensive search criteria screen that you can use to narrow the search so that it returns only the needed results.

For example, the **Scope of List** field defaults to BEST.
The default results screen displays a static version of the information. It has limited drill-down capability using the buttons on the Application toolbar.

Tip: Always try double-clicking on fields in the result screen. Sometimes you find a drill-down.
When you change the **Scope of List** to **ALV**, the application displays the information in a much more flexible format that allows you to:

- Add, hide, or move columns
- Create and save special layouts for future use
- Directly export the report to Excel or Word
Tip 48 – Document Flow

Document Flow is a representation in the system of the sequence of documents for a business transaction.

- Document flow availability is indicated by an icon on the application toolbar.
- For example, a document flow can consist of a quotation, a sales order, a delivery, and an invoice.
Tip 49 – Export Data

SAP provides several ways to export data depending on the transaction.

- For ALV Grids, click the buttons on the Application Menu bar to export directly to Excel or Word, or to export lists in various formats.
- On some screens, from the main menu, select **System > List > Save > Local file**.
- On other screens, from the main menu, select **List > Export > Local file or Spreadsheet or Word Processing**.
Importing requires the use of custom SAP transactions and specially-designed spreadsheets.

Import examples:
- Journal entries
- Pricing
- Adding materials to contracts
Variant

Set of input values for selection screens. Can be used when selection screens are called to initialize fields with default values.

Variants can be created on a selection screen using **Goto > Variants**.
Variants are used to tailor selection screens to produce reports that provide the most useful information.

Using variants, you can:

- Set field defaults
- Protect fields to prevent them from being changed
- Hide fields that aren’t needed
- Make certain fields required
- Adjust other fields to make the report more useful
Tip 53 – Use Variant

To use a variant:

Click the **Get Variant** icon on the **Application Toolbar** and choose the desired variant from the Directory.
Tip 54 – Sessions

Create new sessions:
• From the main menu, select System > Create Session.
• On the Standard Toolbar, click the New Session icon.

End a session:
• From the Menu Bar, select System > End Session.
When you launch SAP, a single session opens. Up to six sessions can be opened.

Open a new session when looking for data that may impact a new transaction: in the **Command field**, type `/o` followed by the new transaction.

Display a material: in the **Command field**, type `/oMM01`. The display transaction opens in a new session.
There are two main Help features:

- **F1 Help** – includes field definitions and information on system messages. Press [F1] on your keyboard to view information about the selected field and the type of data to enter into it.

- **Customized Help** – after accessing a transaction in SAP, from the main menu, select Help > [company name] Help. If active in your company, you will see customized directions that provide step-by-step instruction display for the current transaction.
Tip 57 – Help...

You can also get help from Super Users!

- **Super Users** – They are “power users” who are very familiar with SAP and other systems as well as the company’s business processes.
You can select whether or not pop up dialog boxes appear for Errors, Warnings, Successes.

From the **Customize Local Layout** button

>> **Options** >> **Interaction Design** >> **Notifications** >> **Messages**

Select the types of message you want to pop up on the SAP screen.
Tip 59 – Freeze Report Columns

You can freeze columns on SAP reports, just like MS Excel.

Works like “Freeze pane” in Excel.
Tip 60 – Set Start Transaction

- Go to Extras > Settings > Set Start Transaction
- You must log off and back on to see change.
Tip 61 – Copy Text

- When on a report, press **CTRL + Y** to select and copy data.
Tip 62 – Paste Text

Paste with CTRL V for selections smaller than 8 lines (to fit in the selection window) or use

for larger selections
### Search for a Transaction Code or Menu Title

<table>
<thead>
<tr>
<th>Node</th>
<th>Transaction code</th>
<th>Text</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preceding node</td>
<td>MM01</td>
<td>Create</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Material</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Master data</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Warehouse Management</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Environment</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Shipping</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Environment</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Shipment cost</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Subsequent functions</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Shipment</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Bulk transportation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Environment</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Inventory Management</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Materials Management</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Logistics</td>
</tr>
</tbody>
</table>

- T-code `search_sap_menu` allows you to find the menu path for a given transaction code.
Example:

**vendor master (FI)**

Financial Accounting (FI)

The collective term for all vendor master records.
The vendor master contains the data of all vendors with which a company conducts business.
Tip 65 – Report Layout

Select non hierarchical list for more flexible report layout functions
Tip 66 – Maintain Report Layout

In some transactions the following icon is used to maintain display variants/report layouts:

Position cursor where field needs to be shown and move selected fields to left with the arrow key.

Sort fields by clicking on column header.

Display Warehouse Stocks of Material

<table>
<thead>
<tr>
<th>Material</th>
<th>Plant</th>
<th>S Unit</th>
<th>Value</th>
<th>Value</th>
<th>Value</th>
<th>Val. in Trans./Tfr</th>
</tr>
</thead>
<tbody>
<tr>
<td>100-100</td>
<td>PC</td>
<td>0 001</td>
<td>EUR</td>
<td>EUR</td>
<td>EUR</td>
<td>0.00</td>
</tr>
<tr>
<td>100-101</td>
<td>PC</td>
<td>0 002</td>
<td>EUR</td>
<td>EUR</td>
<td>EUR</td>
<td>0.00</td>
</tr>
<tr>
<td>100-110</td>
<td>PC</td>
<td>0 003</td>
<td>EUR</td>
<td>EUR</td>
<td>EUR</td>
<td>0.00</td>
</tr>
<tr>
<td>100-111</td>
<td>PC</td>
<td>0 004</td>
<td>EUR</td>
<td>EUR</td>
<td>EUR</td>
<td>0.00</td>
</tr>
<tr>
<td>100-112</td>
<td>PC</td>
<td>0 005</td>
<td>EUR</td>
<td>EUR</td>
<td>EUR</td>
<td>0.00</td>
</tr>
</tbody>
</table>

Tip 66 – Maintain Report Layout

In some transactions the following icon is used to maintain display variants/report layouts:

Position cursor where field needs to be shown and move selected fields to left with the arrow key.

Sort fields by clicking on column header.

Displayed Columns

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Material Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plant</td>
<td></td>
</tr>
</tbody>
</table>

Column Set

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Column Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name 1</td>
<td>Material Type</td>
</tr>
<tr>
<td>Name 2</td>
<td>Material Group</td>
</tr>
<tr>
<td>Name 3</td>
<td>Valuated Goods Receipt Blocked Stock</td>
</tr>
<tr>
<td>Name 4</td>
<td>Val. GR Blocked St.</td>
</tr>
<tr>
<td>Name 5</td>
<td>Val. Tied Items</td>
</tr>
<tr>
<td>Name 6</td>
<td>Stock in Transit</td>
</tr>
<tr>
<td>Name 7</td>
<td>Value in Transit</td>
</tr>
<tr>
<td>Name 8</td>
<td>In Transfer (Plant)</td>
</tr>
</tbody>
</table>
Tip 67 – Save Report Layout

Display Warehouse Stocks of Material

- Material
- Material Description
- Plant
- SLoc
- Unit
- Unrestricted
- Crty
- Value Unrestricted

Save layout

Layout: Y00-01
Layout description: By material / plant

Save layout: Y00-01
Name: By material / plant

All users → create/manage user-specific report layouts.
Possibility to create user specific default setting.
/n Takes the user to the root SAP Easy Access menu from anywhere.

/n + [T-code] Takes the user directly to the desired T-code from anywhere. For example, “/nVA01” will take the user directly to the Create Sales Order screen.

/* + [T-code] Like ‘/n + [T-code]’, but takes the user directly into the desired T-code with the last values used. For example, “/*XD02” will take the user directly into change mode screen for the last customer you were changing.

/nex Closes all windows for the current system/client and logs off of SAP.

/o Alone, it will generate an “Overview of Sessions” screen for the current system. It also allows you to generate a new session.

/o + [T-code] When used as a prefix to a transaction code, it will open the target transaction in a new window. For example, “/ova01” will open up the Create Sales Order screen in a new window.
Tip 74 – User Profile

SU3 - T-code to manage your own user id and default settings.
Tip 75 – Wide Cursor

You can make your cursor more visible by going to Options > Interaction Design > Visualization.
Tip 76 – Relationships

Visual Representation of SAP HCM Objects Relationships

Relationships of Objects
Object Types and Object Keys

ORGANIZATIONAL UNIT (O)

cost center allocation

COST CENTER (K)

incorporates

belongs

describes

is described by

describes

Position (S)

WORK CENTER (A)

incorporates

cost center allocation

belongs

occupies

HOLDER

PERSON / USER (P)

TASK (T)

Job (C)

SAP System Provided by:

Converging People, Processes and Systems

www.SAPinsight.com
What is an Infotype?
A SAP Infotype is an information unit used to store employee relevant data required for administration purposes.

It has a 4 digit-code and a related name. It stores similar data into one screen.

For example, Personal Data (Infotype 0002) stores the employee's personal data (i.e., first name, last name, birth date, marital status).
Company Code

Is the link between Finance and Corporate Structure. Legal entity - with one chart of accounts and one currency - that is defined by Finance.
Company Code

FI versus CO

**FI - Finance**
External facing. Legal reporting. P&L.

**CO - Controlling**
Internal facing. How the company is organized and structured financially. Cost Centers, Profit Centers.
To find out who did it and when a document was deleted:

- Execute a display tcode, for example VAO3 (Sales Order Display)
- Enter document number (Do not press enter). Go to Environment > Changes
If you get an authorization error for a transaction you think you should have access to, type `/nSU53` and send a screenshot of the results to your system administrator.

Tip 81 – User Authorization

/nSU53 – Display Authorization Data for User
To create a shortcut to transactions directly on your desk top:

- Navigate to the transaction on the SAP Easy Access menu.
- From the Menu Bar: Click on Edit > Create shortcut on the desktop
If a transaction is taking too long to run, you can stop it by clicking on the Control menu > **Stop Transaction** (Top left corner of your screen)

This icon is available on all transactions.
Click on the **Customize Local Layout** button from the **Standard Toolbar**. Select the **Hardcopy** option.

The print is sent to the default printer.
Tip 85 – Auto tab to Fields

Click on the **Customize Local Layout** button from the **Standard Toolbar**.

**Select Options... >> Interaction Design >> Keyboard Settings.**

Cursor moves between entry fields automatically. This function is useful when you are entering a large amount of data and you do not want to press the TAB key to move from field to field.

AutoTAB only works at the end of an input field. For example, if the Material field can hold 12 characters, but the material number you enter is only 7 characters long, you must still press the TAB key to move to the next input field.
**Tip 86 – Change Font Size**

Click on the **Customizing of local layout** button on the Standard Toolbar.

Select **Options**…

Click on the **Visual Design** option.

Make changes in the **Font Settings** section.
Display Favorites below the SAP Menu:

From the Menu Bar, select Extras > Settings.

Check **Display favorites at the end of list**. Click on the **Save** button.
Useful when you work in a transaction with a table of values. This example is ME22N.

Arrange the table columns to reflect the layout that works best for you. Then save your layout for future use.

Click on the Table Setting button in the top right corner of the table.
Tip 89 – Share Your Favorites

From the **Menu Bar**:

Save your Favorites to a file:
Select **Favorites > Download to PC**.

To upload a Favorites list:
Select **Favorites > Upload from PC**

This will either insert or append, not replace.
You will not lose your existing Favorites.
The Matrix runs SAP.

ABAP is the only language understood by aliens.

SAP can divide by zero.

By reading the source code of transaction SE38 you will temporarily be granted invisibility.

Chuck Norris uses SAP to keep track of his death count.
The Keep Button

Keeps the search result list “pinned” to the screen.

Great for some data entry and research options.
90 in 90
Tips & Tricks
Every SAP Super User Should Know

SUPER stuff to DO

1. Evaluate this session.
2. Visit the SAPinsight table.
3. Buy a book to learn more about Super Users.

Content by Constance Darnell and Gus Lopes