SAP Procurement Overview and Process Course

Rev. December 2014
SAP Navigation
Objectives

• Understand SAP Basic Navigation
• Understand SAP Master Data
• Understand SAP terminology
The SAP Toolbar
Customize your status bar by selecting the information you want to see all the time. In the example below, Transaction was selected. When you are in a transaction, it will display the transaction name in the status bar.
Using Favorites in SAP Easy Access

Favorites allows you to:

- Add, change, move or delete a favorite.
- Insert folder creates file folder to organize SAP transactions the way you want to work.
- Insert transaction adds, changes and/or moves SAP transactions into your file folders.
- Add other objects enters Web sites so you can access them directly from SAP.
From the Extras menu, select Settings. In the dialog box that displays, select Display Technical Names to show transaction numbers with names in the SAP Menu.
Creating Sessions in SAP

A new session can be created by using the menu path **System > Create session** or by selecting the icon.

The SAP status bar displays the active session number.
Use the *End Session* option on the System Menu or select the icon to end your session.
Hard Copy, allows the printing of a hardcopy of any SAP screen to an SAP default printer.
SAP Naming Convention:

- XXX1 is typically “Create”
- XXX2 is typically “Change”
- XXX3 is typically “Display”

e.g. MM01 Create Material
     MM02 Change Material
     MM03 Display Material
Quick Navigation with Transaction Codes

Use the prefix “/n” to go directly from one transaction to another.

Use the prefix “/o” to start a new session in a specific transaction.
Indicates *match code* capability

The *match code* shows ways of searching for lists of data (suppliers, customers, materials, etc.)
Allows search for multiple selections.

Performs search for the range of numbers entered.
SAP Procurement Overview
The Procurement application that was implemented by IES is the combination of a Requisition to Invoice process with the addition of Inventory Management functions.
Items in “red” are either not used, or are now being performed in SRM.
Master Data:

Master Data is the foundation for Procurement. Its purpose is to control and manage the data containing attributes and characteristics for materials, services, and suppliers.
Requisitioning:

When a material or a service is needed, a requisition is used.

Note: The only requisitions done in R/3 are for MRP and Inventory orders, all others are now created in SRM.

The exception would be if they are for Market Price.
Sourcing:

Sourcing determines and maintains a list of suppliers for materials and services.

Using Master Data improves the efficiency and effectiveness of this sub-process.
Contracting:

The Contracting sub process facilitates the establishment of contractual relationships with suppliers and agencies for the purchase of materials and services.
Purchase Ordering:

Purchase Ordering consists of placing Purchase Orders with suppliers for materials and services, referencing requisitions, sourcing, and contracts.
Receiving:

After Purchase Orders have been created, the Receiving process will manage the receipt of those materials, as well as manage the acceptance of services rendered.
Invoicing:

After materials or services are received, supplier invoices can be accepted and paid.

Supplier invoices will be posted in SAP R/3 for each PO, referencing Master Data as needed.
Inventory Management:

Inventory Management controls inventory counts and the availability of items. This includes materials issued, returns, transfers, and physical inventory counts.
SAP Purchasing

Requisitioning-Purchase Orders-Goods Receipts-Invoicing
Course Objectives
• After successfully completing this course you will be able to:
  – Search SAP for vendor, material, requisition, contract, purchase order, Goods Receipt, or Invoice information
  – Change, Delete, or Process a Purchase Requisition
  – Create, Change or Delete a Purchase Order
  – Run Purchase Order reports in SAP
  – Approve Purchase Orders
Course Overview
Purchasing Course Overview

- Display Vendor (XK03)
- Display Material Master (MM03)
- Display Contract (ME33K)
- Create Purchase Order (ME21N)
- Change, Cancel, Delete Purchase Order (ME22N)
- Approve Purchase Order (ZME28)
- Print Purchase Order and Purchase Order Changes (ME9F)
- Display Purchase Order (ME23N)
• List Displays of POs (various)
• Display Vendor Invoice Document (ME23N or Y_DC1_32000525)
• View Accounting Information (ME23N)
A purchase order that is created against a contract includes definite quantity commitments, as well as definite dollar commitments at the time of the issuance of the order.

A purchase order constitutes an authorization to the supplier to deliver the materials or services.

Note: Purchase Orders are not a source of supply.
• The purchase order is an encumbered document
• A validity period may exist
• Actual delivery dates must be specified for the purchase
• Account Assignment must be entered per line item
• Purchase orders require a plant to be entered. Without proper authorization an agency-wide purchase is not possible for agencies that have multi-plants (for example, PennDOT, Public Welfare and Correctional Industries).
• The purchase order is used by agencies to order items from agency-wide or multiple agency contracts

• Goods receipts and invoice payments are created with reference to a purchase order
Master Data
Master Data (MD) manages all material and service information for Procurement and Finance for the Commonwealth.

Master Data is made up of master records, which contain the description of the material or service that is to be procured, as well as other general agency information.

Master Data is used throughout the Procurement process. It is the sub process that establishes the foundational data for all other sub processes in the Procurement process. In addition, it helps prevent duplicate data.
Master Data Introduction

• Material Master:
  – Houses basic data about materials that are purchased, used, or otherwise managed by the Commonwealth

• Vendor Master:
  – Stores basic data about suppliers from which the Commonwealth purchases materials and services
• This transaction allows the user to display all the information contained in a supplier’s master record, based on the vendor number. Use this transaction to research any aspect of the supplier’s master data.

• The XK03 transaction allows the user to see information in all screens. Note: The Commonwealth is not using the *Withholding tax* screen.

• The multiple screens and all the fields contained in each are displayed and structured in exactly the same sequence as if the user was creating or changing the vendor master record, except all fields are grayed-out as the user is in display-only mode.
Initial Display Screen

1. Use match code search to find the vendor number. Enter Company Code and Purchase Org.

2. The boxes in these areas allow the user to select which screens to view.

3. Select the ENTER icon when done to view the supplier’s information.
Example: Display Vendor: Address

<table>
<thead>
<tr>
<th><strong>Vendor</strong></th>
<th>136930</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name</strong></td>
<td>EPLUS TECHNOLOGY INC</td>
</tr>
<tr>
<td><strong>Street Address</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Street House number</strong></td>
<td>130 FUTURA DR</td>
</tr>
<tr>
<td><strong>Postal Code/City</strong></td>
<td>13461-3430, POTTSOWN</td>
</tr>
<tr>
<td><strong>Country</strong></td>
<td>US, USA</td>
</tr>
<tr>
<td><strong>Region</strong></td>
<td>PA, Pennsylvania</td>
</tr>
<tr>
<td><strong>Time Zone</strong></td>
<td>EST</td>
</tr>
<tr>
<td><strong>Transportation Zone</strong></td>
<td>45, Montgomery</td>
</tr>
<tr>
<td><strong>PO Box Address</strong></td>
<td></td>
</tr>
<tr>
<td><strong>PO Box</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Communication</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Language</strong></td>
<td>English</td>
</tr>
<tr>
<td><strong>Telephone</strong></td>
<td>717-730-1066, Extension</td>
</tr>
<tr>
<td><strong>Mobile Phone</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Fax</strong></td>
<td>510-495-1260, Extension</td>
</tr>
<tr>
<td><strong>E-Mail</strong></td>
<td><a href="mailto:cskbra@eplus.com">cskbra@eplus.com</a></td>
</tr>
<tr>
<td><strong>Standard Comm. Mtd</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Data line</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Telbox</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Comments</strong></td>
<td>022806 CHG PER VENDOR DARREN RAGUEL WSS</td>
</tr>
</tbody>
</table>
• Material Master Record
  – Contains all information relative to a material: physical characteristics, finance account, MRP, purchasing, inventory, storage, etc.

• With this transaction the user can display a material master record as it currently exists in the SAP system
The types of information contained for the material include:

- Material Description
- Unit of Measure
- Storage location stocks
- Material Valuation
- Purchasing information
- MRP (material requirements planning)
To display material master information, use transaction MM03.

- Enter your material number
- Select the SELECT VIEWS button
- A separate dialog box will display
- In the dialog box, select Basic Data 1, Purchasing, and Accounting 1
- Select the GREEN checkmark at the bottom of the dialog box

Note: If you are running MRP, you would select the views listed above in addition to the MRP1, MRP2, and MRP3.
When you select the GREEN checkmark, the dialog box shown below will display:

- Enter your plant and select the GREEN checkmark
This will display the information for the material. By selecting the tabs at the top, you can move through the different views.
Display Contracts
There are a number of different contract types to accommodate the needs of both Statewide and Agency contracts in SAP. Generally these will be:

**Value Based** – Used if the total value to be ordered during the validity period of the Contract is know in advance.

**Quantity Based** – Used if the total quantity of all release orders (POs) issued against the Contract is not to exceed a certain predefined quantity.

Note: This has changed with the implementation of SRM, they are no longer defined as Value Based or Quantity Based.
After the Contract is created and saved, it is automatically routed for the appropriate approvals.
Contract Conditions:

Maintains current pricing, discounts, freight charges, and other price data by Contract.

These conditions will be copied from the selected Supplier Quotation to decrease data entry.

However, if necessary, they can also be entered directly into the Contract.
• This transaction allows the user to display all the information contained in a contract (outline agreement)

• To begin this transaction, you can use either the menu path or the transaction code

Menu Path: Logistics > Materials Management > Purchasing

Outline Agreement > Contract > Display

Transaction: ME33K
To display a contract, select the match code next to the Agreement space. This will open a dialog box to search for your contract number. Select the appropriate search tab, and enter criteria, then select the GREEN checkmark. Locate the contract and select the number, this will populate the contract number into the Agreement field. Select the GREEN checkmark at the top to display the contract.
The contract will open to the Item Overview screen. This screen lists the material, description, material group, unit of measure, price, and vendor number.

See the next slide for a description of the icons used in this display.
The icon/drop down next to the “Display Contract” is the SERVICES FOR OBJECT icon. Select the drop down paper to view the attachment to the contract.

- Hat – Header Data (validity date)
- Envelope – Supplier Information
- People – Supplier Partner Info
- Flag – Release Strategy
- Puzzle Piece – Item Detail
- Paper/Pencil - Text
Requisitioning
Overview of Requisitioning, Sourcing, and Purchasing

- Requisitions are the beginning of the procurement process.
  - Requisitions in SAP are created via MRP processing or manually for inventory orders
  - These requisitions are then pushed into SRM through Plan Driven Procurement (PDP) for processing by procurement professionals
• Sourcing identifies the suppliers available to satisfy the procurement needs
  – Planned orders created from MRP run are converted into requisitions to begin the procurement process
• An SAP purchase order is created with reference to a contract (release orders)

• Purchase orders cannot be created until a source of supply and a price have been established

• Purchase orders that require approvals cannot be sent to the supplier until the required approvals have been fully executed
Overview of Purchasing

• Purchase orders can be created for both materials and services, and can be for both inventory items and expensed items

• Purchase orders cannot be created with items from multiple contracts on the same purchase order

• Purchase orders always require accounting information

• Purchase orders are always encumbered
Purchase Orders are used to place orders with suppliers for materials or services.

There are a number of types of Purchase Orders, including Standard, Emergency, Off-Contract, and Sole Source. However, only Standard PO New is used today in SAP, all other types are now being used in SRM.
All Purchase Orders will require at least one approval. (The SAP workflow thresholds are $3,000, please note that these thresholds are not consistent with SRM.)

Approvals for Purchase Orders will be routed automatically to the appropriate approver via workflow when appropriate.
This transaction is used to create a purchase order.

To begin this transaction, you can use either the menu path or the transaction code.

**Menu Path:**
- Logistics > Materials Management > Purchasing > Purchase Order > Create > Vendor/Supplying Plant Known

**Transaction Code:** ME21N
The purchase order is divided into three sections: Header, Item Overview, and Item Detail. The Header and Item Detail are divided into sub-tabs and the Item Overview is designed like a spreadsheet.

Doc Type is Standard PO (New)
Above the Header are the Order Type, Vendor, and Doc Date (date defaults) which must be completed. The Header section contains information applicable to all line items contained on the purchase order. The tabs include: Delivery/Invoice, Conditions, Texts, Address (supplier’s), Communications Data, Partners, Additional Data (validity period), Org Data, Status, and Customer data.
• Header texts are used to store information on a purchase order that will be applicable to all line items contained on the purchase order. The following texts have been defined for use by the Commonwealth.

  – Header Text: used to store any special instructions and conditions required of the supplier. This text will be printed out on the purchase order that will be sent to the supplier.
- Encumbrance Information Text: used to store fund, cost center and G/L account numbers as well as the amount encumbered per fund. This field should also be used to enter the justification of the purchase and any special notes for internal use. This text will not print out on the purchase order that will be sent to the supplier.

- Shipping Instructions: used to enter any specific shipping instructions to supplier that relate to all items on the purchase order. This text will always copy from the contract. This text will be printed out in the purchase order that will be sent to the supplier.
– Terms of Payment: used to enter any type of special payments that need to be communicated to supplier. An example would be staggered payments. Note that this text is not used to establish the standard payment period for an invoice. This text will always copy from the contract. This text will be printed out in the purchase order that will be sent to the supplier.

– Insurance Information Text: used to input any insurance information related to the purchase order. This text will always be printed out in the purchase order that will be sent to the supplier.

– Bond Information Text: used to input any bond information related to the purchase order. This text will always be printed out in the purchase order that will be sent to the supplier.
– Vendor Memo General: copies from vendor master. This text will be printed out in the purchase order that will be send to the supplier.

– Vendor Memo Purchasing Org: copies from vendor master. This text will be printed out in the purchase order that will be sent to supplier.

– Confidential Terms of Payment Note: used for communication with the invoice processor. This text will always copy from the contract. This text will not be printed out in the purchase order that will be sent to the supplier, as it is confidential information that is simply stored here.
• Item texts are used to store information on a purchase order that will be applicable to a particular line item in the order. The following text have been defined for use by the Commonwealth:

  – Item Text: used to store any special instructions and conditions to the supplier. If no attachment exists, this text will always copy from the contract. This text will be printed out in the purchase order that will be sent to the supplier.
- Material PO Text: used to supply additional descriptive information for the material or service. This text will copy from the material master or service master record and will print out in the purchase order that will be sent to the supplier.

- Shipping Instructions: used to enter any specific shipping instructions to that supplier that apply to an individual item in the order. This text will always copy from the contract. This text will be printed out in the purchase order that will be sent to the supplier.
• This transaction is used to change, cancel, delete and add an attachment to a purchase order.

• Some changes to a purchase order will require the order to go through another release strategy (re-approval), including a change to terms and conditions or an increase to price and/or quantity of greater than 10%. Certain other release thresholds may be surpassed because of an order change as well.
• Attachments can be added to orders via the change purchase order transaction (ME22N) only

• Most document types can be added to a purchase order, such as Word, Excel, PowerPoint, Adobe Acrobat, or other documents that may be submitted by the supplier
• There is no version control for purchase order changes. Once the purchase order is changed only the latest version of the purchase order is displayed on the screen.

• A history of purchase order changes is recorded by the system so that a user can see who made changes and when the changes were made to the order. For each changed field the old value and new value will be recorded, with the exception of header and item texts. The time of the text changes and the user ID are recorded by the system, but not the old versus new entries.
• No approval is required for purchase orders of less than $3,000 in SAP. Document type is Standard PO (New)

• Any non-standard terms and conditions require additional approvals
• This transaction is used to approve a list of purchase orders that are ready for further procurement processing

• Before a purchase order can be sent to the supplier, it must go through the approval process (release strategy)
• Display the Release (Approve) Purchasing Documents screen using transaction code ZME28

• Complete the Release code (code for approving agent), Set Release (indicator used to search for documents ready to be set for release), Enter Plant (agency code)

• Select the EXECUTE button

• This will display a list of documents waiting approval

• Double click the document and review the information

• Then go back to the document list, with the document just reviewed still selected, and select the “Release” button.

• You will see a message at the bottom of the screen stating the PO is set for release. Select the SAVE icon, the Release (Approve) Purchase Document screen appears displaying a system message “Release Saved”.
• Use this transaction to print or transmit a purchase order or purchase order change to a supplier

• To begin this transaction, you can use either the menu path or the transaction code

Menu Path:  

Transaction: ME9F
• Once in ME9F, enter your Purchasing Organization and Purchasing Group number
• Select the EXECUTE icon
A list of purchase orders ready for transmitting will display.

Select the purchase order to be printed by selecting the box to the left of the entry.

Select the OUTPUT MESSAGE button.

You can also select the DISPLAY MESSAGE button to display the purchase order before you Output it to make sure it is correct.
Re-Transmit:

- Enter your purchase order number
- Change the Processing status field to “1” to re-submit
- Select the EXECUTE icon
• Select the last message line of the purchase order to be printed, select the MESSAGE DETAIL button.

• Select the last message line
• Select the REPEAT OUTPUT button, then select the SAVE icon
• Select the GREEN (back) arrow to take you back to the search screen
Once you are back to the search screen, re-enter your purchase order number.

You will now leave the Processing Status at “0”.

Select the Execute button.

This will display your purchase order ready for reprinting.

Select the purchase order by checking the box to the left.

Select the OUTPUT MESSAGE button.
• Use this transaction to display a purchase order and review the information

• To begin this transaction, you can use either the menu path or the transaction code

**Menu Path:**

Logistics > Materials Management > Purchasing

Purchase Order > Display

**Transaction:** ME23N
ME23N allows you to display a document. Notice the fields are grayed out so changes can't be made.
These transactions allow the user to display lists of purchase orders for a specific plant.

There are several ways to display a list of purchase orders:

- ME2B List POs by Requisition Tracking Number
- ME2C List POs by Material Group
- ME2K List POs by Account Assignment
- ME2L List POs by Vendor
- ME2M List POs by Material
- ME2N List POs by Document Number
- ME2S List Services by PO Number
Invoicing/Good Receipt
An invoice is created in the system in one of four ways:

1. Payable Services PO Box (Scanned at Revenue)
2. Evaluated Receipt Settlement (ERS)
3. Invoicing Plan
4. XML
• Supplier sends paper invoices to a central PO box in the Dept of Revenue. The invoice is scanned and indexed based on key elements from the invoice.

• Comptroller conducts a pre-audit review of each PO invoice prior to posting the document in SAP. Upon posting of the invoice document, the system completes a 3-way match to confirm that the Goods Receipt, Invoice, and PO are present and any discrepancies are within acceptable tolerances.

• In addition, SAP also checks for CRP issues when the invoice is $5,000 or more.
• When the invoice is posted and there is a three way match, it will be available for the next payment run. A three way match means PO price $\geq$ invoice price and goods receipt/service receipt qty $\geq$ invoice quantity.

• If the invoice price is $>\text{ the PO price}$, the invoice will be blocked for payment with a Price block (Prc.)
• If the invoice quantity is > the GR/SR quantity, the invoice will be blocked for payment with a Quantity block (Qty).

• A manual block (M) will be set on invoices >= 5K when obligations exist in the Contractor Responsibility Program (CRP). When the invoice is blocked for CRP obligation, it will be routed through workflow back to the Agency invoice reconciler.
• A manual block (M) will be set on all invoices $\geq$ $5$ million. When the invoice is blocked for $\geq$ $5$M, it will be routed through workflow back to the Agency invoice reconciler who will contact Treasury to get a pay date.

• Both of the Manual blocks are automatically checked for each invoice processed with reference to a PO. If either circumstance exists, the invoice processor is given an error and required to set the manual block on the line item.
Learning Objectives:

• Understand how to search for and display previously entered GR and Invoice information
• Understand how to locate supplier payment information
• Understand how to display accounting information
• Display Vendor Invoices can be used to verify internal questions such as:
  – Have the accounts been posted
  – Who were the documents created by
• It can also be used to answer supplier questions, such as:
  – Has the invoice been created in SAP?
  – Has it been sent to Treasury?
  – Has Treasury paid the invoice?
  – What address was my check sent to?
You can view the Goods Receipt or Invoice Document information in ME23N in the Item Detail section – Purchase Order History tab.
You can also locate supplier payment information by using transaction Y_DC1_32000525.
• Enter your PO number
• Select the check box next to the PO Related Invoice Payment Data along with the check boxes for the three items below it as shown
• Select the EXECUTE icon
This will display the Detailed Invoice Payment Report for the purchase order.

<table>
<thead>
<tr>
<th>Status</th>
<th>P#</th>
<th>BusArea</th>
<th>PDocTp</th>
<th>PGrp</th>
<th>Collect#</th>
<th>POVend#</th>
<th>POVendName</th>
<th>InvNo</th>
<th>PayVend#</th>
<th>PayVendN</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
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<td>16</td>
<td>2ND</td>
<td>BA3</td>
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<tr>
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<td>CENTRAL</td>
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<td>5107029153</td>
<td>120630</td>
<td>CENTRAL</td>
</tr>
</tbody>
</table>
Scroll to the right to view the check information and payment date.
You can view line item balances and account assignment information in ME23N by selecting the Environment menu and selecting AC Commitment Documents.
When the dialog box “Documents in Accounting” appears, double click on the Funds Management document.
The Document Journal will display showing all activity for line items. You will see carry forwards from previous fiscal years, changes to amounts in PO line items, deletions, and reductions (invoices).
Inventory Management Overview
As with Receiving and Invoicing, there was a considerable change in the Inventory Management (IM) sub process. It includes an extensive set of transactions, such as issuance to users, transfers/stock transports between locations, planning and replenishment, receipt, returns, scrapping/sampling, and physical inventory adjustments.
**Replenishment:** automates the replenishment of stock based upon inventory strategies.

**Physical Inventory:** manages the recording and reconciliation of periodic physical inventory counts. Counts are taken on printed documents and then entered into the system. The counts are then matched with the book inventory stock levels in the system. Differences require a recount, approvals for unmatched counts, and adjustments.

**Issues/Returns:** The purpose of this component is to ensure accurate recording of issues from inventory (when items are used) and returns to inventory. Issues/Returns includes materials issues, scrapping/sampling, returns, and external issues.
Transfers/Stock Transport Orders: will handle transferring materials between Commonwealth locations. This is the document that creates the demand from inventory from shopping cart.
1. A purchase order that is created against a contract includes definite quantity and dollar commitments at the time of issuance.

☐ True

☐ False
2. A contract constitutes an authorization to the supplier to deliver the materials or services.

☐ True

☐ False
3. Which transaction is used to display all the information contained in a supplier’s master record, based on the vendor number?

☐ MM03
☐ XK03
☐ ME23N
☐ ME33K
4. A Material Master Record contains the material description, unit of measure, storage location stocks, material valuation, purchasing information and MRP information.

☐ True

☐ False
Knowledge Check

5. Purchase orders that require approvals cannot be sent to the supplier until all required approvals have been executed.

☐ True

☐ False
6. Purchase orders can be created for both contract and non-contract items, and can be created for items from multiple contracts.

☐ True

☐ False
7. The purchase order document type is important as it will determine who is required to approve the purchase order.

☐ True

☐ False
8. If the invoice price is greater than the PO price, the invoice will be blocked for payment.

☐ True

☐ False
9. If the invoice quantity is greater than the GR quantity, the invoice will not block for payment.

☐ True

☐ False
10. When the invoice is posted and there is a three way match, it will be available for the next payment run. A three way match means the PO price $\geq$ invoice price and goods receipt qty $\geq$ invoice quantity.

☐ True

☐ False
Questions and Answers
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Glossary of SAP Terms
SAP Terminology can be located by following the procedures below:

• Log onto the Copa Custom Help website at www.copacustomhelp.state.pa.us

• On the left navigation of COPA Custom Help is a Glossary link. Select to pull up the entire SAP Glossary.
SAP Basics Help Cards

**Single Sign-on**
- SAP GUI for Windows
  - Double click SAP logo icon on desktop to launch SAP
  - User will automatically be authenticated to their SAP user ID via their network ID and password

**Workplace**
- Double click Browser icon on desktop to launch application
- Navigate to workplace URL
- User will automatically be authenticated to their Workplace user ID via their network ID and password

**Log Off**
- Follow the menu path: System > Log off from any screen
- Click the YES button to verify log off

**Tool Bar Buttons**
- Enter [ENTER]
- Save [F11]
- Back [F3]
- Exit [SHIFT + F3]
- Cancel [F12]
- Print [CTRL + P]
- Fnd [CTRL + G]
- Find Next [CTRL + F]
- First Page [SHIFT + F9]
- Previous Page [SHIFT + F10]
- Next Page [SHIFT + F11]
- Last Page [SHIFT + F12]
- Help [F1]

**Sessions**
- To open a new session: System > Create session
- To switch between sessions: [ALT + TAB] or [CTRL + ESC]
- To close a session: System > End session

**Frequently Used Commands**
- /UXXX: Creates a session and goes to transaction XXXX
- /O: Lists open sessions
- /i: Ends the current session
- /A: Ends the current system task and goes to transaction XXXX
- /NG000: Returns to SAP P3 System screen from any system screen
- /NEND: Logs off the system

**Transaction Codes**
A transaction code is a four-character code that uniquely identifies a transaction. From any screen in SAP, it is possible to locate the code identifying that transaction.

1. Follow the menu path: System > Status.
2. The System Status screen appears.
3. The four-character code identifying that transaction shows in the Transaction field.
4. Note the code for future reference.
5. Click to return to the original screen.
### SAP Basics Help Card

#### A - D Icons
- Activate
- Address
- Alarm
- Align
- Annotation
- Business Object
- Calculation
- Change Text
- Collapse
- Column Left
- Column Right
- Command Field
- Communication Diagram
- Compare
- Condense
- Continue
- Convert Unit of Measurement
- Copy
- Create
- Create More
- Create Note
- Create Session
- Create Shortcut
- Create Text
- Current
- Cut
- Cut Relation
- Data Model
- Date
- Delete
- Delete Row
- Change <-> Display
- Display More
- Display Note
- Display Text
- Do Not Select Equal

#### E - N Icons
- Emphasize
- Entity Type
- Expand
- Export
- Extend
- Extreme Left
- Extreme Right
- Failure
- Fax
- Filter
- Final Date
- Find
- Find Next
- First Page
- Fix Columns
- Foreign Key
- Generate
- Graphics
- Hierarchy
- Icon List
- Import
- Individual Help
- Info Flow Diagram
- Information
- Last Page
- Layout
- List
- Lock
- Long Text
- Mail
- Move
- Network Graphics
- New Entries
- Next Hierarchy Level
- Next Node
- Next Value
### O - S Icons
- Optical Archive Viewer
- Other Object
- Page Left
- Page Right
- Page View
- Paste
- Period
- Phone
- Place Holder
- Planning Table
- Position
- Predecessor
- Previous Hierarchy Level
- Previous Node
- Previous Value
- Process
- Process Election Matrix
- Process Exists
- Redo
- Reference List

### S - Z Icons
- Refresh
- Relation
- Release Columns
- Rename
- Replace
- Retrieve
- Row
- Scenario
- Select Block
- Select Equal
- Select Mode
- Select Not Equal
- Set Status
- Settings
- Short Message
- Skip
- Sort Down
- Sort Up
- Stack
- Structure List
• To view the Management Directives, Executive Orders, Administrative Circulars, and Manuals go to the Office of Administration website at www.oa.state.pa.us

• To view the Procurement Handbook and the Procurement Code, go to the Department of General Services website at www.dgs.pa.gov, select Businesses at the top of the page, Materials and Services Procurement, Procurement Resources
SAP Procurement Overview and Process Course

Thank you!