Financial Management Modernization Initiative (FMMI)

FMMI 301 – FMMI Portal and SAP Navigation

Transforming Financials at the People's Department

Version 2.00

Agenda

- Course Introduction
- Module 1 – Introduction to FMMI Navigation
- Module 2 – FMMI Navigation
- Module 3 – FMMI Online Help Navigation
- Module 4 – FMMI Queries and Reports
- Course Summary
- Course Evaluation

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- **Course Introduction**
- Module 1 – Introduction to FMMI Navigation
- Module 2 – FMMI Navigation
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Logistics and Icebreaker

- Health and Safety
- Facilities
- Cellular Phone and PDAs
- Breaks and Lunch
- Icebreaker Activity
  - Your name
  - Your position
  - Your Agency/Staff Office
  - Your primary office location
  - An interesting fact about you

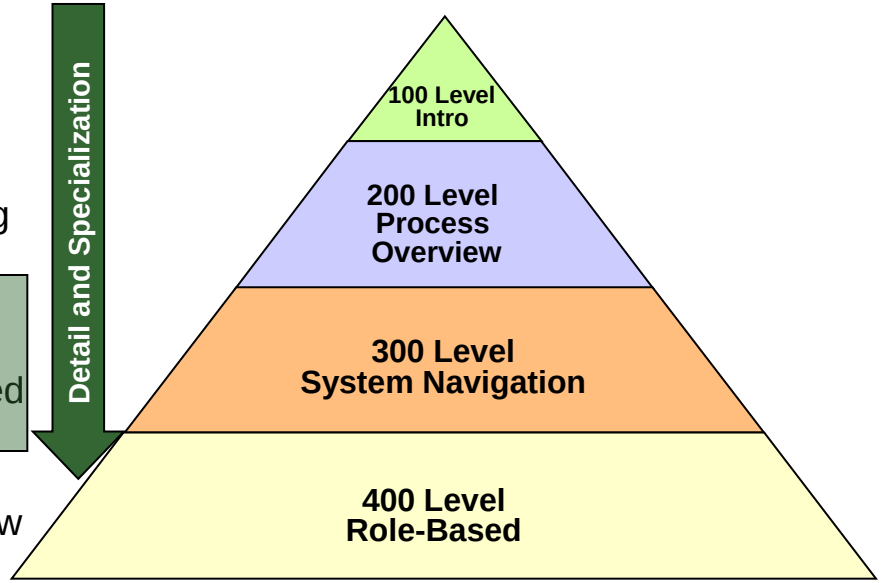
Course Structure, Format, and Materials

- **Course Structure:**
  - Modules
  - Demonstrations, Walkthroughs, Exercises
  - Learning Checkpoint Questions and Answers
  - Course Completion and Evaluation
- **Course Format:**
  - Instructor-led (ILT) – Training facilitated by an Instructor in a classroom
- **Course Materials:**
  - Participant Guide
  - Job Aid(s)

Your Curriculum

The FMMI Training curriculum outlines the training required for FMMI User Roles. The training courses provide an understanding of the FMMI program and application(s) and the USDA financial processes.

- **Introduction to FMMI** (100 Level)
  - Overview of the FMMI project
  - Instructor-led course, delivered in an auditorium or via teleconference
- **Process Overview** (200 Level)
  - High-level view of USDA's core financial business processes
  - Web-based course, delivered via AgLearn Learning Management System
- **System Navigation** (300 Level)
  - Hands-on practice navigating the FMMI system
  - Instructor-led course, delivered in a computer-based classroom
- **Role-Based** (400 Level)
  - Hands-on training and detailed introductions on how to process transactions in the FMMI system
  - Instructor-led course, delivered in a computer-based classroom



Introduction to FMMI (100 Level) Review

As a prerequisite to the 200 Level courses, you participated in the FMMI 101 - Introduction to FMMI course. FMMI 101 provided a high-level overview of the FMMI project, changes and impacts of the implementation, and benefits of the new system.

After completing the 100 Level course, you learned to:

- Summarize the FMMI program objectives
- Explain the benefits and advantages FMMI provides
- Describe an Enterprise Resource Planning (ERP) solution
- Explain new business processes and concepts
- Explain the key implementation timeline and milestones
- Explain what organizations are impacted by each release of FMMI
- Provide participants information on the available support after they return to their jobs and FMMI Go-Live

Process Overview (200 Level) Review

As a prerequisite to the 300 Level course, you participated in the 200 Level courses. The 200 Level Process Overview courses take a step further and provides you a high-level overview of FMMI's new terminology and business processes.

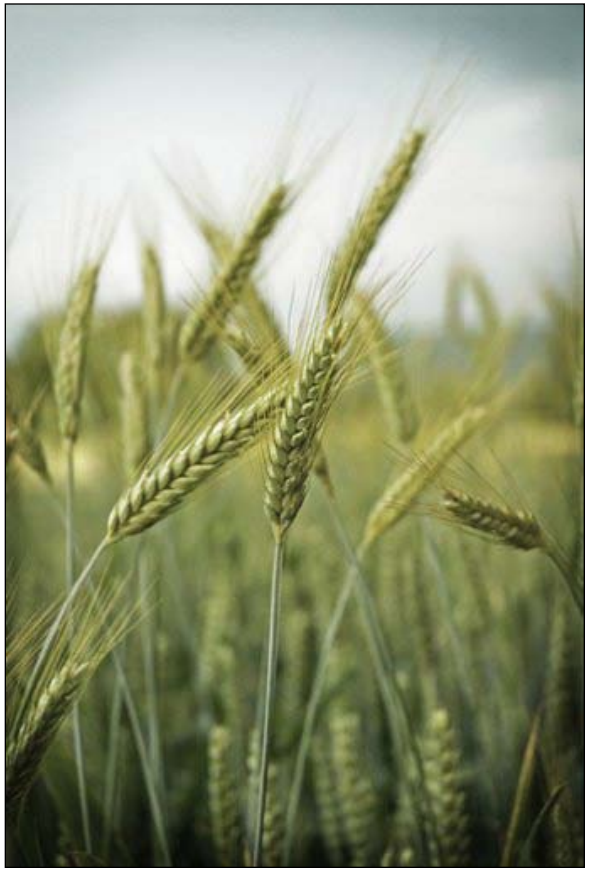
After completing the 200 Level courses, you learned to:

- Provide an overview of the FMMI business processes
- Explain the Master Data Maintenance end-to-end processes
- Explain the organizational elements within each of the process areas
- Describe the process flow, business activities, and roles within of the processes
- Explain the key terminology associated with each of the processes
- Describe the various reports

Course Objectives

After completing this course, you will be able to:

- Describe SAP and identify SAP modules used by FMMI
- Explain the key SAP and FMMI terms and concepts
- Navigate the FMMI Portal
- Explain the difference between master data and transactional data
- Manage favorites
- Describe the screen elements and types of fields
- Perform searches in FMMI
- Navigate Online Help
- Run FMMI reports



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- **Module 1 – Introduction to FMMI Navigation**
- Module 2 – FMMI Navigation
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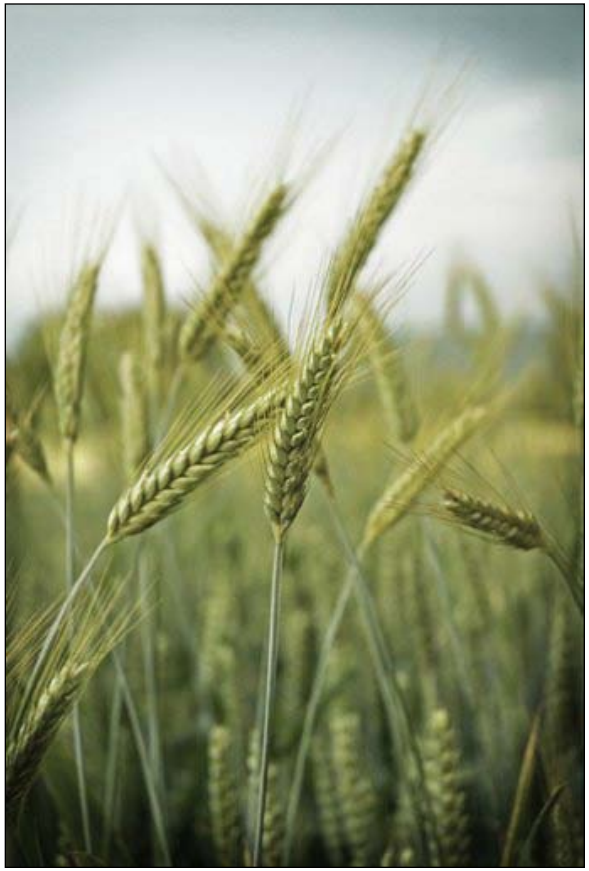
Module Objectives

After completing this module, you will be able to:

- Define common FMMI and SAP terms and concepts
- Explain what is SAP/ FMMI
- Identify and describe the primary SAP modules FMMI uses
- Explain what is the FMMI Portal



Key Terminology

Let's review the following terms and definitions before beginning the Introduction to FMMI Navigation module:

- **ERP**: Enterprise Resource Planning
- **FMMI**: Financial Management Modernization Initiative, also known as the SAP system used for USDA financials
- **Legacy System**: A previous financial system that has been fully or partially replaced by FMMI
- **Real-time**: A timely process, without any noticeable time delay
- **SAP**: Systems, Applications, and Products in Data processing

SAP / FMMI Overview

Systems, Applications, and Products in Data processing (SAP) is a powerful and integrated Enterprise Resource Planning (ERP) system

The Financial Management Modernization Initiative (FMMI) is the term associated with the SAP system used to manage financials at USDA

SAP Modules

A SAP Module is a component of SAP that provides functionality for a specific part of the business.

FI - Financial Accounting

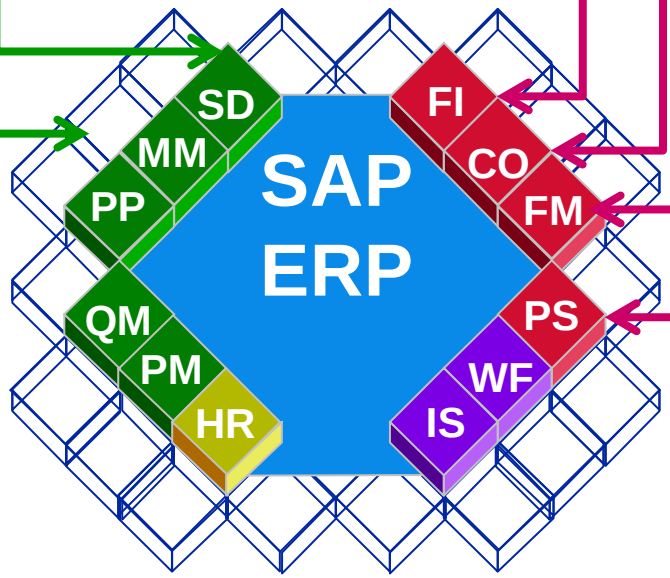
- Accounts Receivable
- Accounts Payable
- General Ledger Accounting
- Closing and Reporting
- Special Purpose Ledger
- Asset Management

SD - Sales and Distribution

- Customer Master Data
- Sales Processing
- Billing
- Pricing / Conditions
- Credit Management

CO – Controlling

- Cost Management
- Cost Allocation
- Overhead Cost Controlling



MM – Materials Management

- Purchasing

FM – Funds Management

- Funds Management
- Master Data
- Budget Distribution
- Budgetary Accounting
- Funds Control

PS - Project Systems

- Work Breakdown Structure
- Cost Management

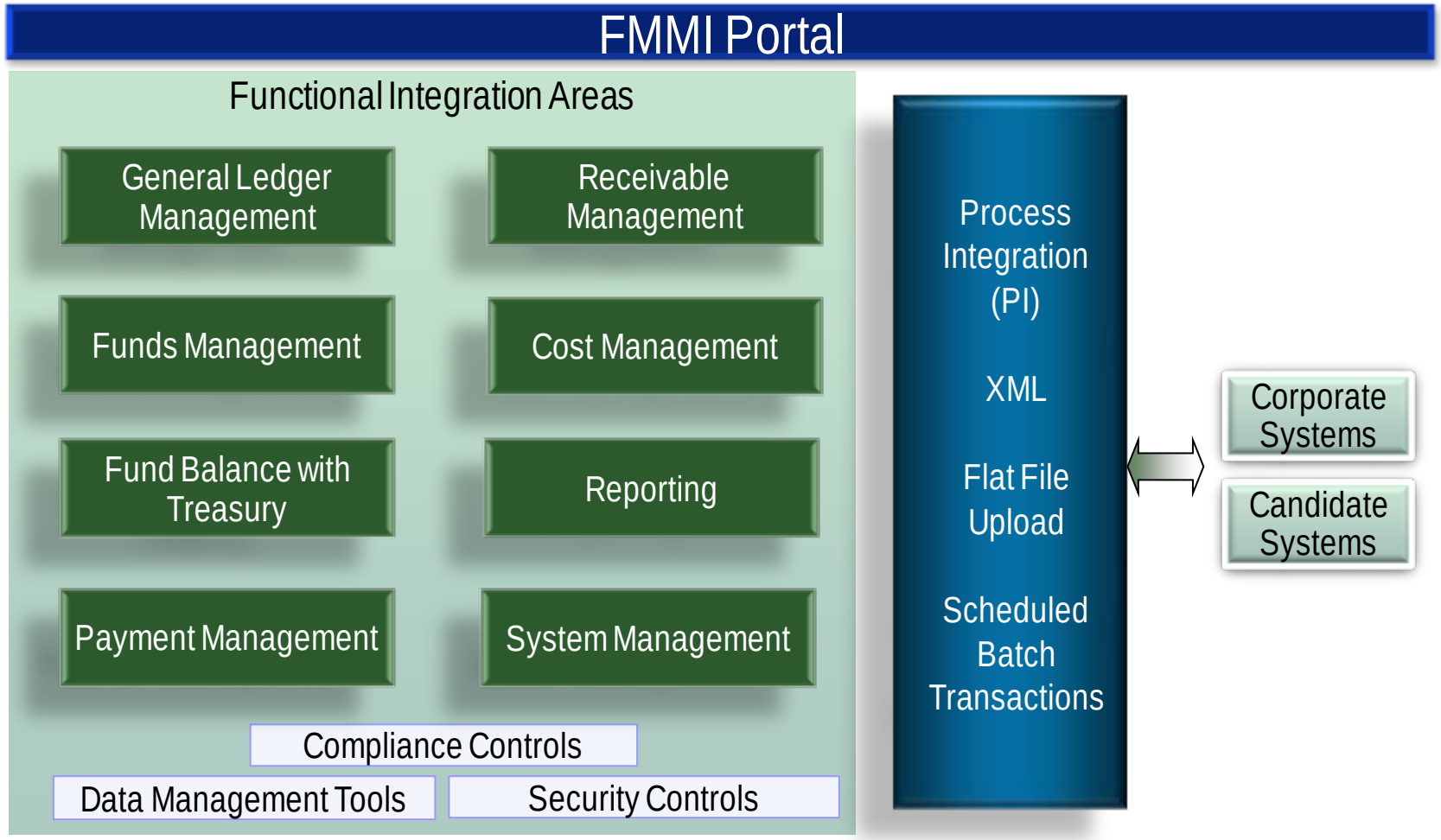
Integration of Modules

SAP Enterprise Portal

Financials (FI)	Controlling (CO) / Project Systems (PS)	Sales & Distribution (SD)	Materials Management (MM)	Funds Management (FM)	Business Intelligence (BI)

	Financials (FI)	Controlling (CO) / Project Systems (PS)	Sales & Distribution (SD)	Materials Management (MM)	Funds Management (FM)	Business Intelligence (BI)
FMMI Core Financials	▪ System Mgmt ▪ General Ledger Mgmt ▪ Fund Balance with Treasury Mgmt ▪ Payment Mgmt ▪ Receivable Mgmt	▪ Cost Mgmt	▪ Receivable Mgmt	▪ Payment Mgmt	▪ Funds Mgmt	▪ Fund Balance with Treasury Mgmt
Reporting						
SAP Definitions	▪ Facilitates management & external reporting of legally required financial info. & documents ▪ Immediately after data is entered, the system displays info. on updated accounts, account totals, & balances	▪ Allows USDA to measure its flow of costs & revenue & is used for internal mgmt. controls of costs ▪ Allows recording of info. and is structured in a way that suits USDA's own mgmt. & reporting purposes	▪ Helps to record customer sales & to ship products to the customer - also known as order fulfillment ▪ Helps to optimize all the tasks and activities carried out in sales, delivery, & billing – includes pricing, addresses, packaging requirements, & other customer info.	▪ Supports the procurement & inventory functions of day-to-day business operations such as purchasing, inventory management, & re-order point processing ▪ Where material master data is maintained	▪ Budget, monitor, & control Commitments, Obligations, & Expenditures ▪ Reduce available budget as Purchase Requisitions &/or Purchase Orders are created ▪ Prevent budget overruns by causing hard stop when funds are depleted ▪ Can be used for Appropriations or Working Capital Funds	▪ A robust reporting tool used to fulfill the reporting needs of both SAP modules & external data sources ▪ BI extracts data from multiple sources and allows users to analyze selected data using queries ▪ BW is a read only system, which protects source data from being inadvertently overwritten

FMMI Integration Detailed View



Learning Checkpoint Question and Answer (Q&A)

1. What is SAP?
2. What is FMMI?
3. Name three modules of SAP being used by FMMI.

Module Summary

In this module, you have learned to:

- Define common FMMI and SAP terms and concepts
- Explain what is SAP/ FMMI
- Identify and describe the primary SAP modules FMMI uses
- Explain what is the FMMI Portal

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- **Module 2 – FMMI Navigation**
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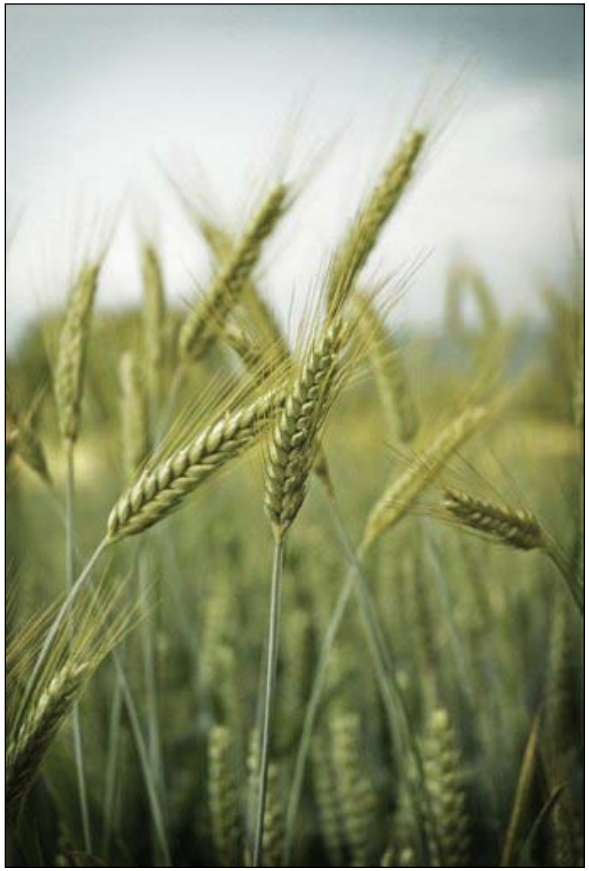
Module Objectives

After completing this module, you will be able to:

- Log on and log off the FMMI system
- Identify the layout of the FMMI Portal
- Explain how your role in FMMI determines your data access
- Identify key elements of FMMI screens
- Identify the various types of system messages
- Explain what is a transaction in FMMI
- Differentiate between Master Data and Transactional Data
- Create, change, and display a transaction



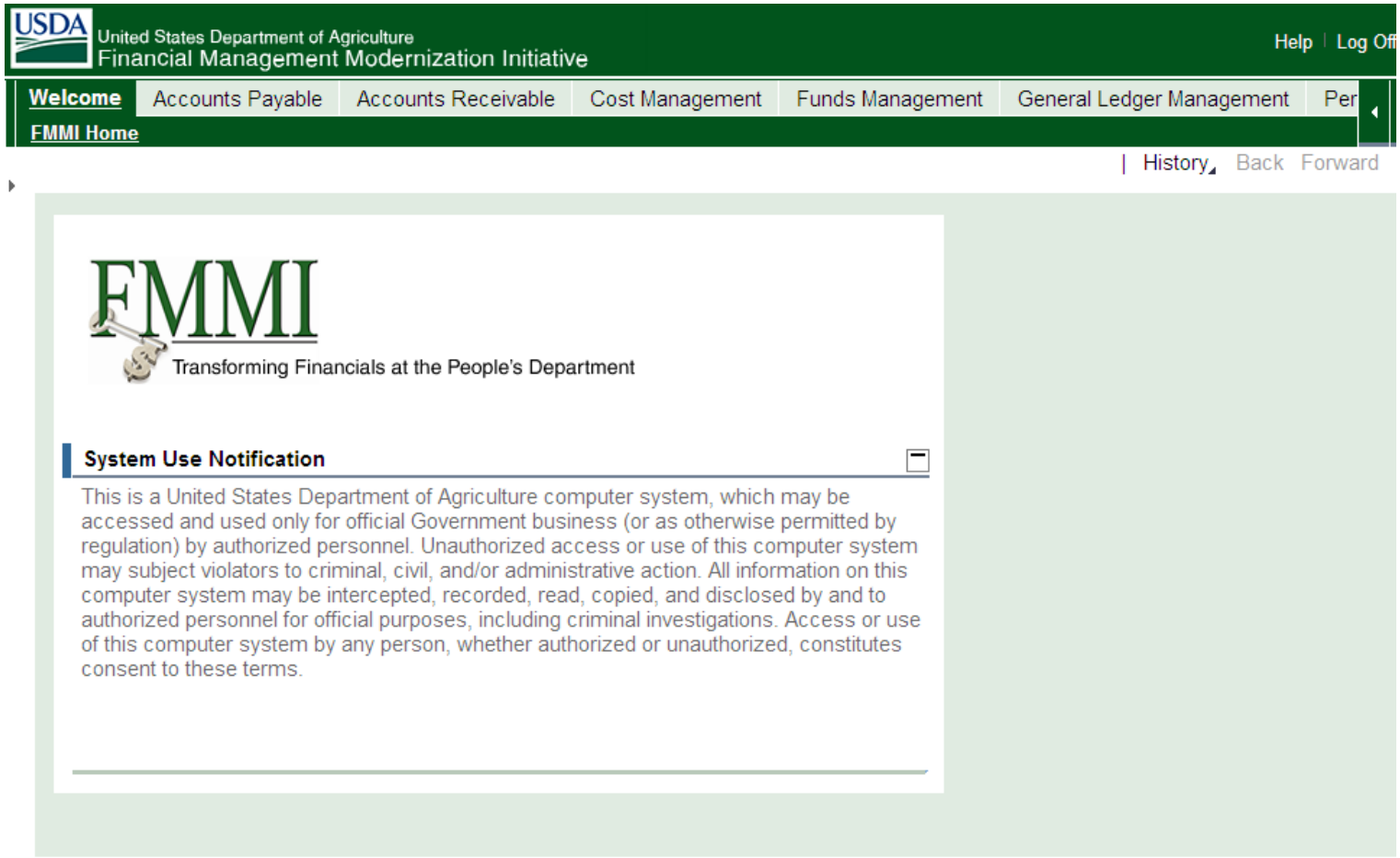
Key Terminology

Let's review the following terms and definitions before beginning the FMMI Navigation module:

- **FMMI Role**: The system access provided to FMMI users to perform various business activities
- **FMMI Portal**: Web-based single point of entry into FMMI
- **Process Area**: A major grouping of activities in a process area that enables users to perform their work in the FMMI environment

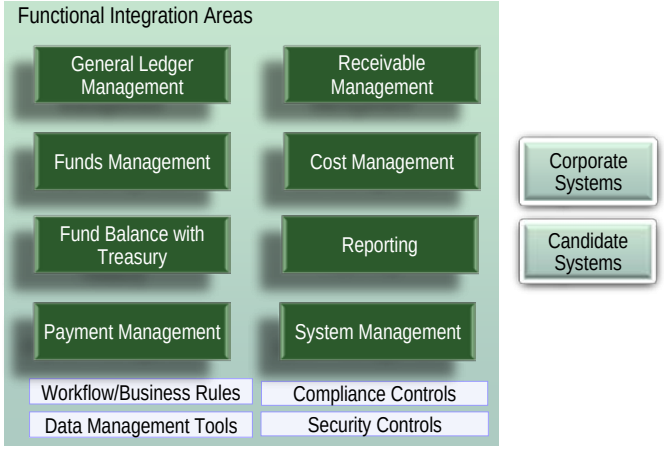
FMMI Portal Overview

The FMMI Portal is a web-based single point of entry into FMMI.



FMMI Portal and Integration

The FMMI Portal displays the various process areas, controls, and system interfaces as one user interface.



User

Internet Enabled PC with FMMI Portal

FMMI Process Areas, Controls & Systems

FMMI Portal Capabilities

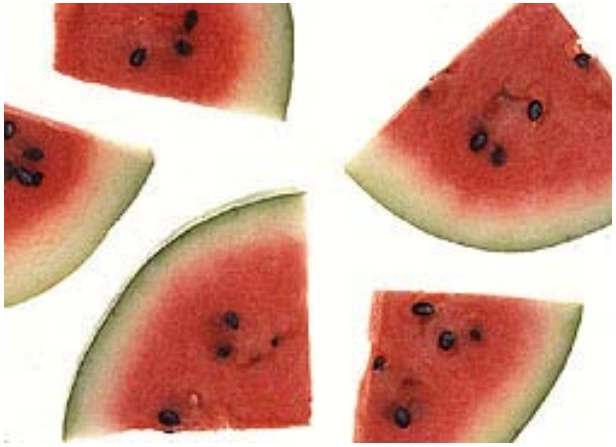
The FMMI Portal provides the following capabilities:

- Secure access where users will sign-on with their eAuthentication account
- Single sign-on to FMMI
- Role-based access controls where users can only access FMMI transactions that are associated with their role

FMMI Log On

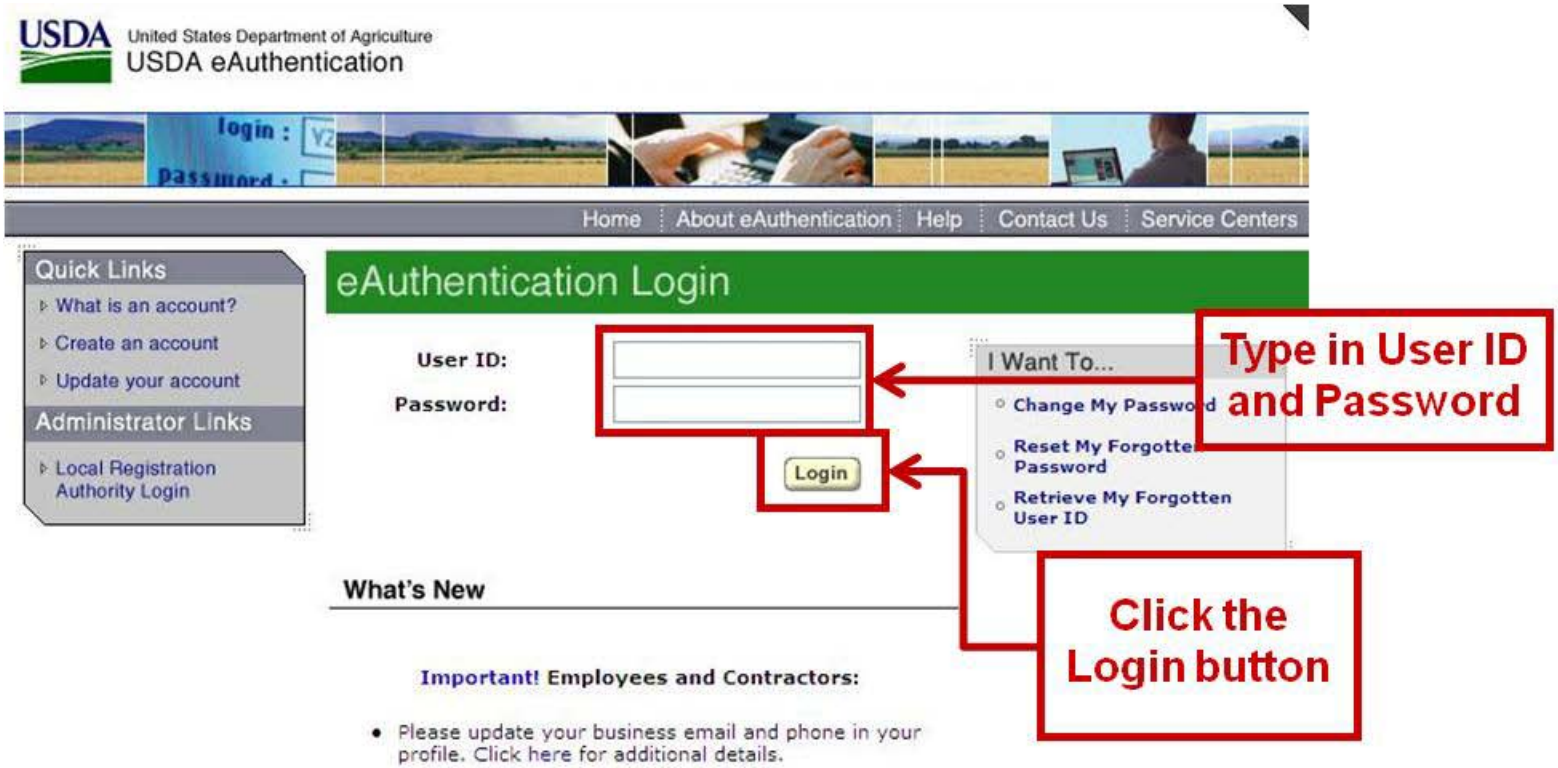
How do I access the FMMI system?

- Log on to FMMI using Internet Explorer
  - No desktop client software is required
- Access the FMMI website to launch the application
- Log on to FMMI using your Level 2 eAuthentication username and password
  - Integration with eAuthentication means you have single sign-on between FMMI and other USDA applications such as AgLearn



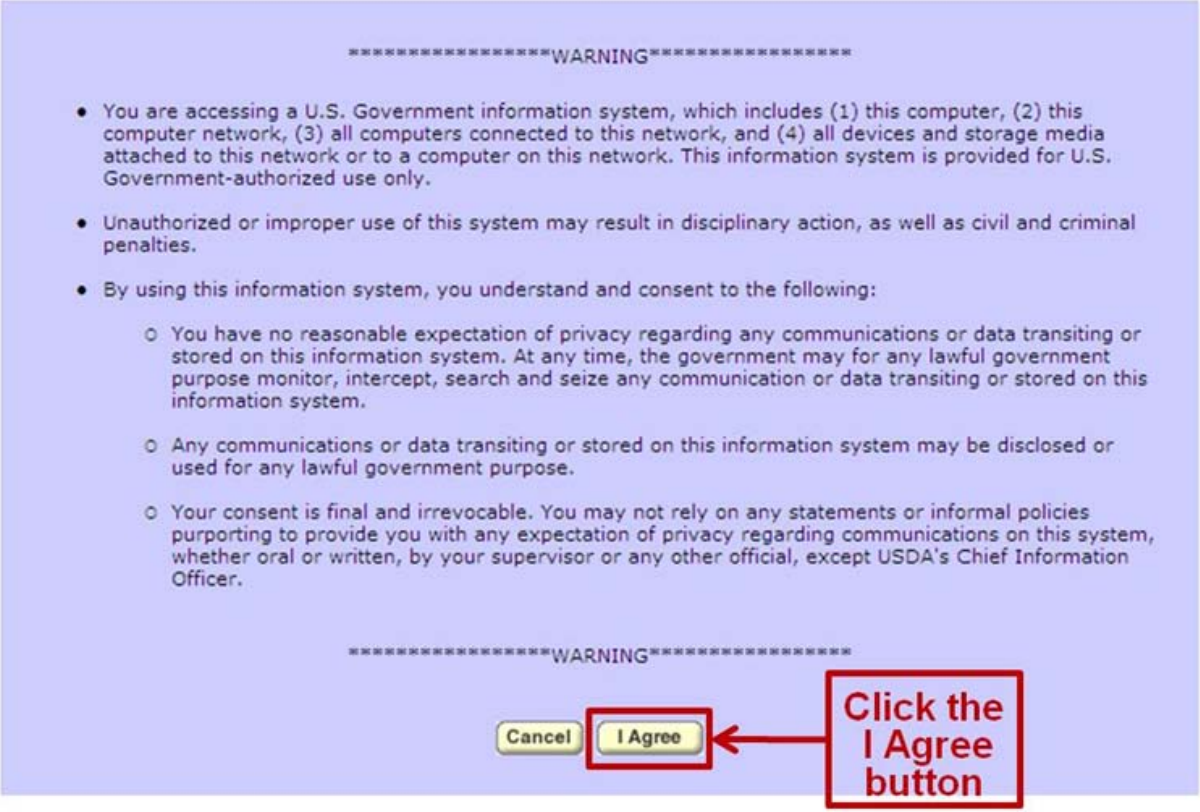
eAuthentication Login Page

When you click the Login button from the FMMI Homepage, you will be directed to the eAuthentication Login Page



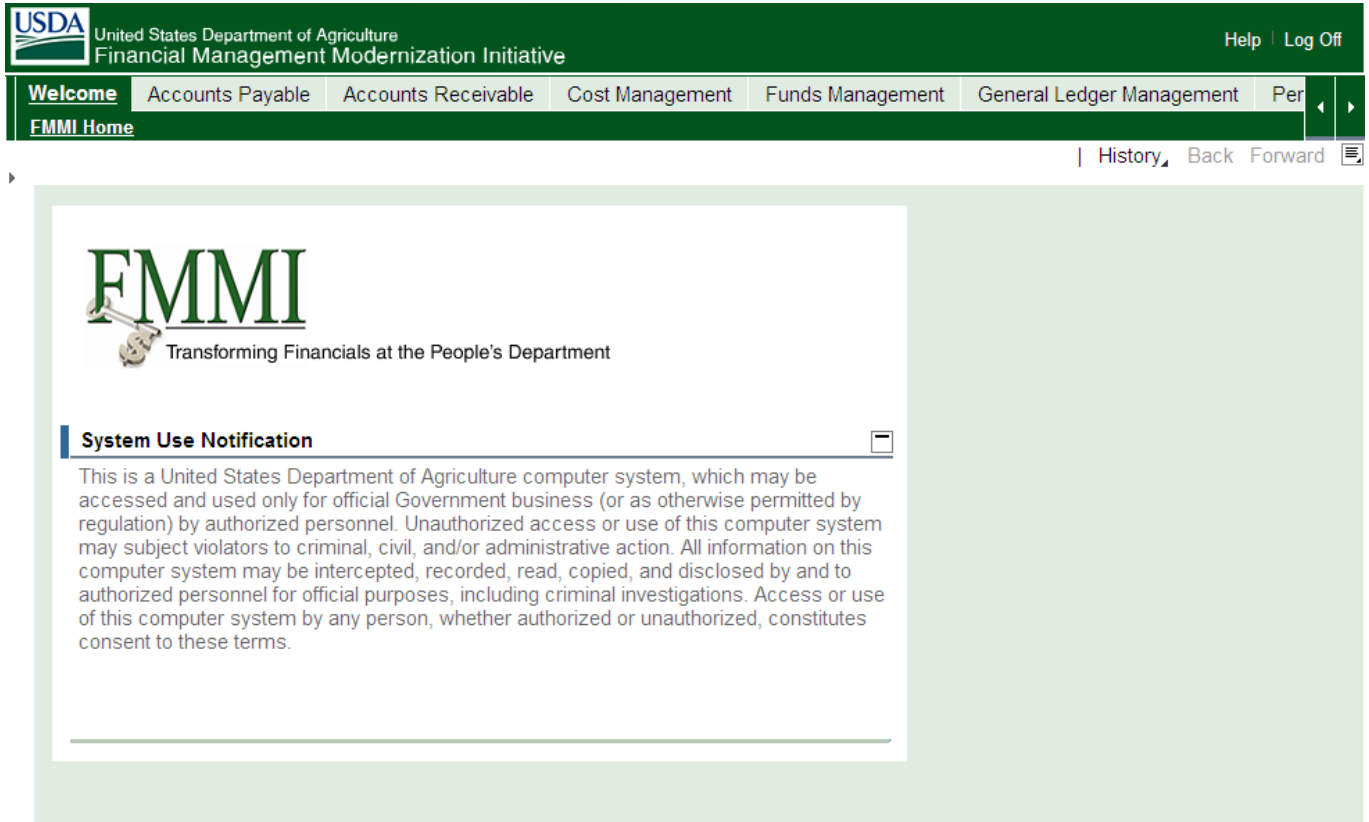
eAuthentication Warning

Before being directed to the FMMI Portal Logon you must agree to the terms and conditions of eAuthentication



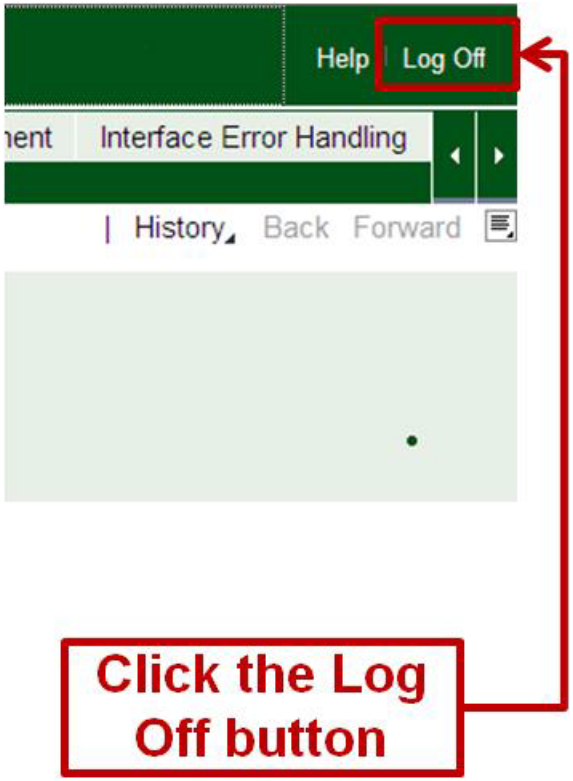
FMMI Homepage

When you login with your eAuthentication credentials, you will be directed to the FMMI Homepage.



FMMI Log Off

- Users should log out to maximize security
- Users log out when the session is complete
- There is an idle time out after 30 minutes
- Save all data before logging off the system
- FMMI displays a dialog box to confirm or cancel actions that cause data loss
- The browser closes automatically when users log out



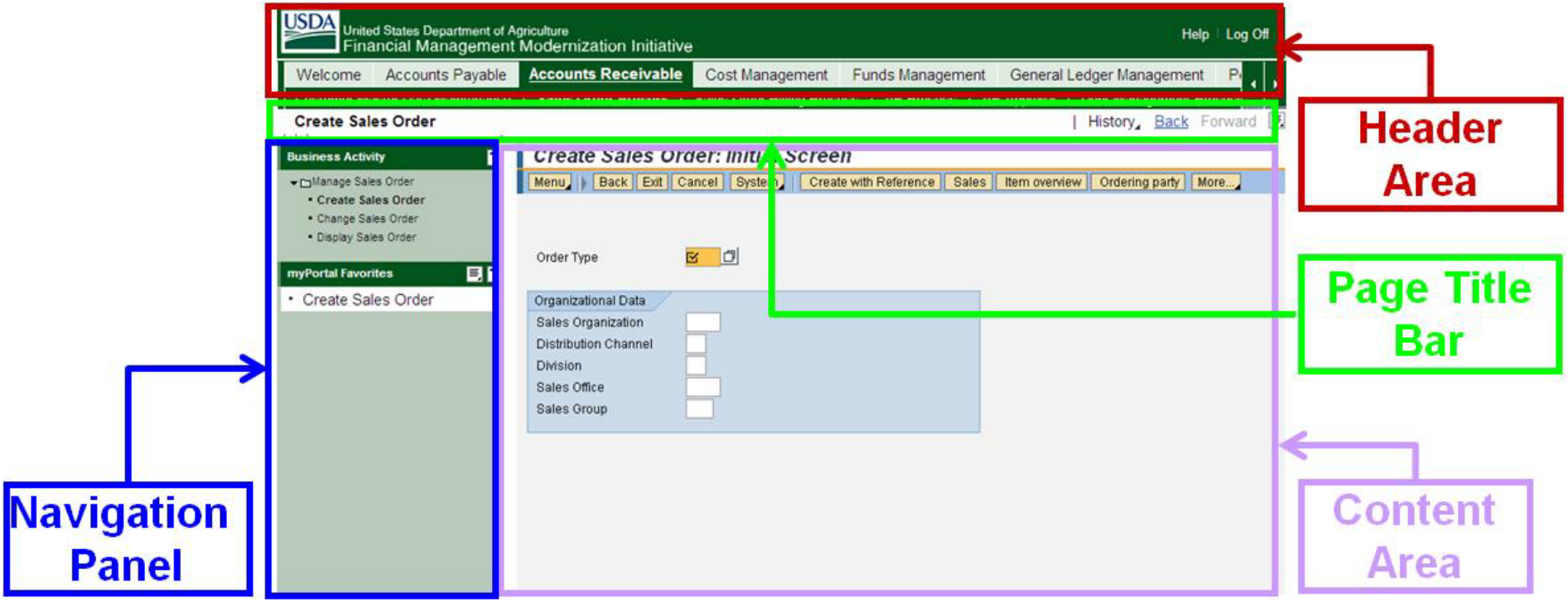
Hands-on Activity

Log On and Log Off FMMI

- **Purpose**:
  - Use this procedure to log on and off of the FMMI system
- **Roles**:
  - All Roles

FMMI Portal Desktop

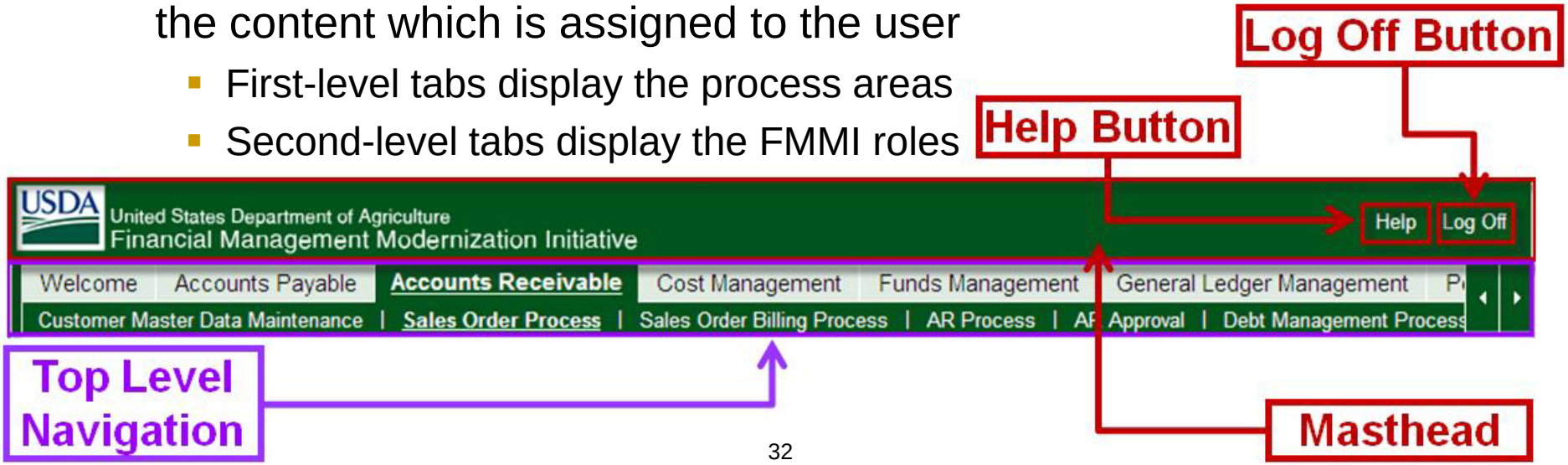
The FMMI Portal desktop refers to the entire portal screen, any displayed content and its layout. The FMMI Portal desktop is divided into the following areas: Header Area, Page Title Bar, Navigation Panel, and Content Area.



Header Area

The Header Area is located in the upper part of the web browser window. This area does not change when the user navigates from one page to another. The Header area consists of the following elements:

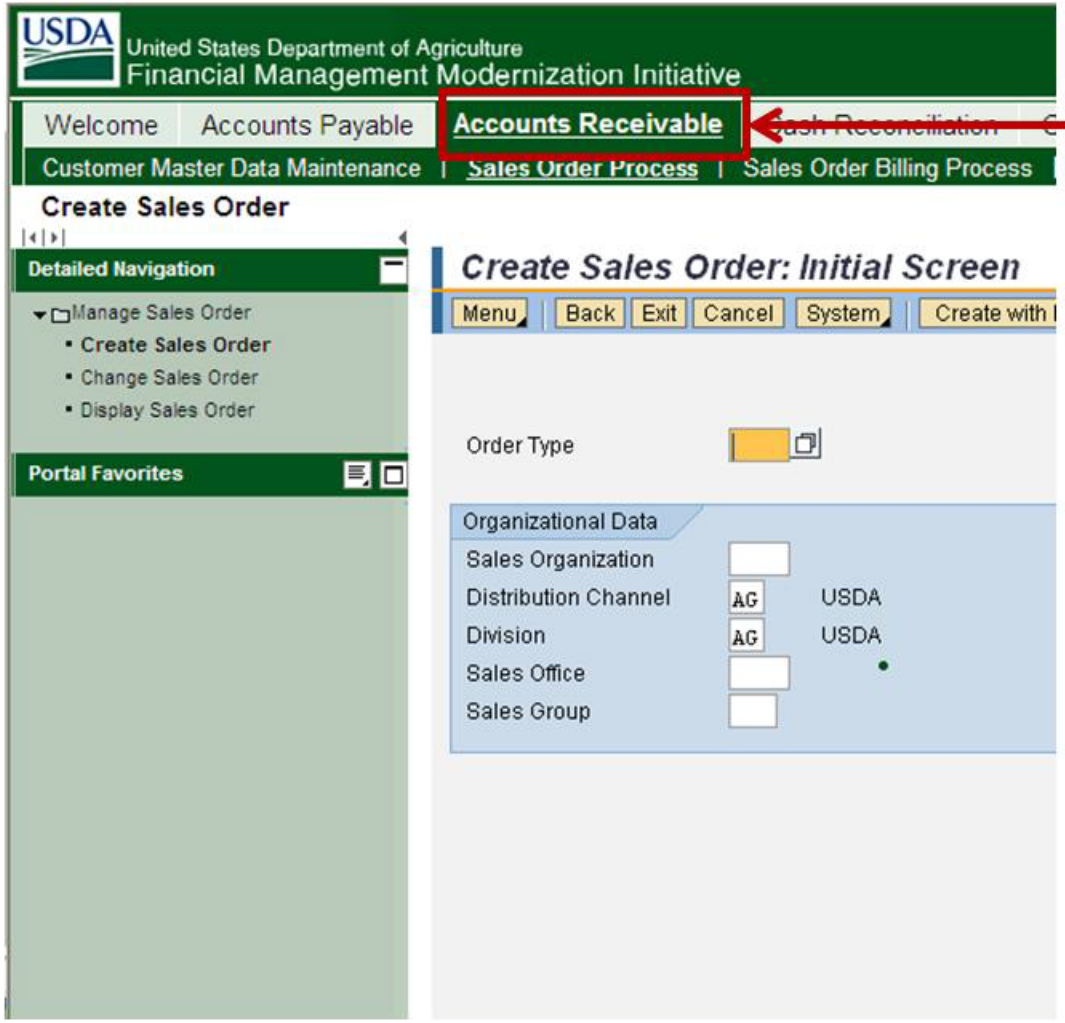
- **Masthead** – The banner of the FMMI Portal user interface
  - Includes **Help** and **Log Off** links
- **Top-level Navigation** – Displays the entry point for navigation using the content which is assigned to the user
  - First-level tabs display the process areas
  - Second-level tabs display the FMMI roles



Top-Level Navigation

- The Top-Level Navigation menu depends on the role(s) a user is assigned
  - Example: A person with a Master Data Maintainer role has access to Create, Change, Display and Delete Master Data
- A role matches the user's specific tasks and information needs; relieving the effort of searching through layers of information
- The log on identification in the portal is linked to the FMMI role(s) a user is able to view and access in the portal
- Users are not able to access a transaction in FMMI that is not contained in their role profile

Click the Process Area

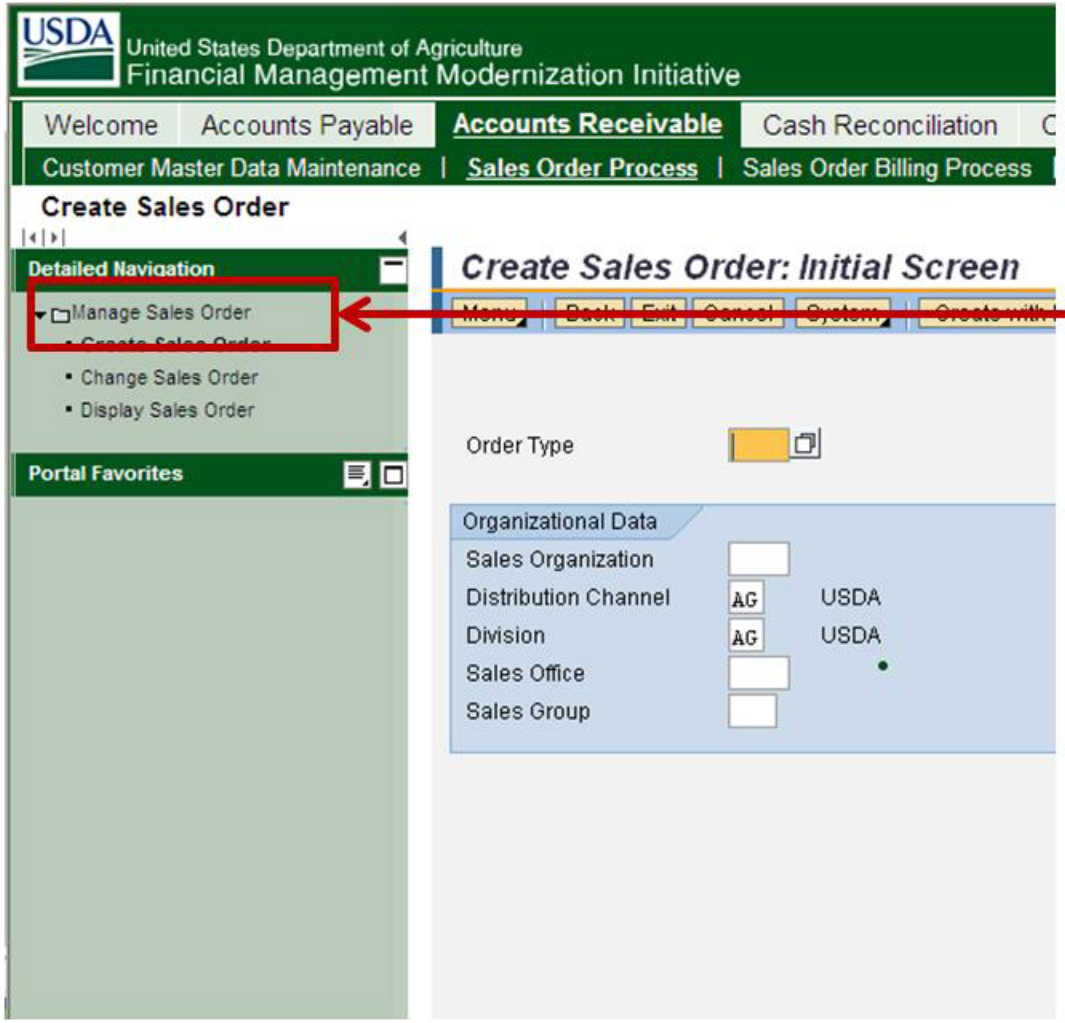


Click the FMMI process area (e.g., Accounts Receivable) from the first level tab.
All corresponding FMMI roles (e.g., Sales Order Process) appear on the second level tab

Click the FMMI Role

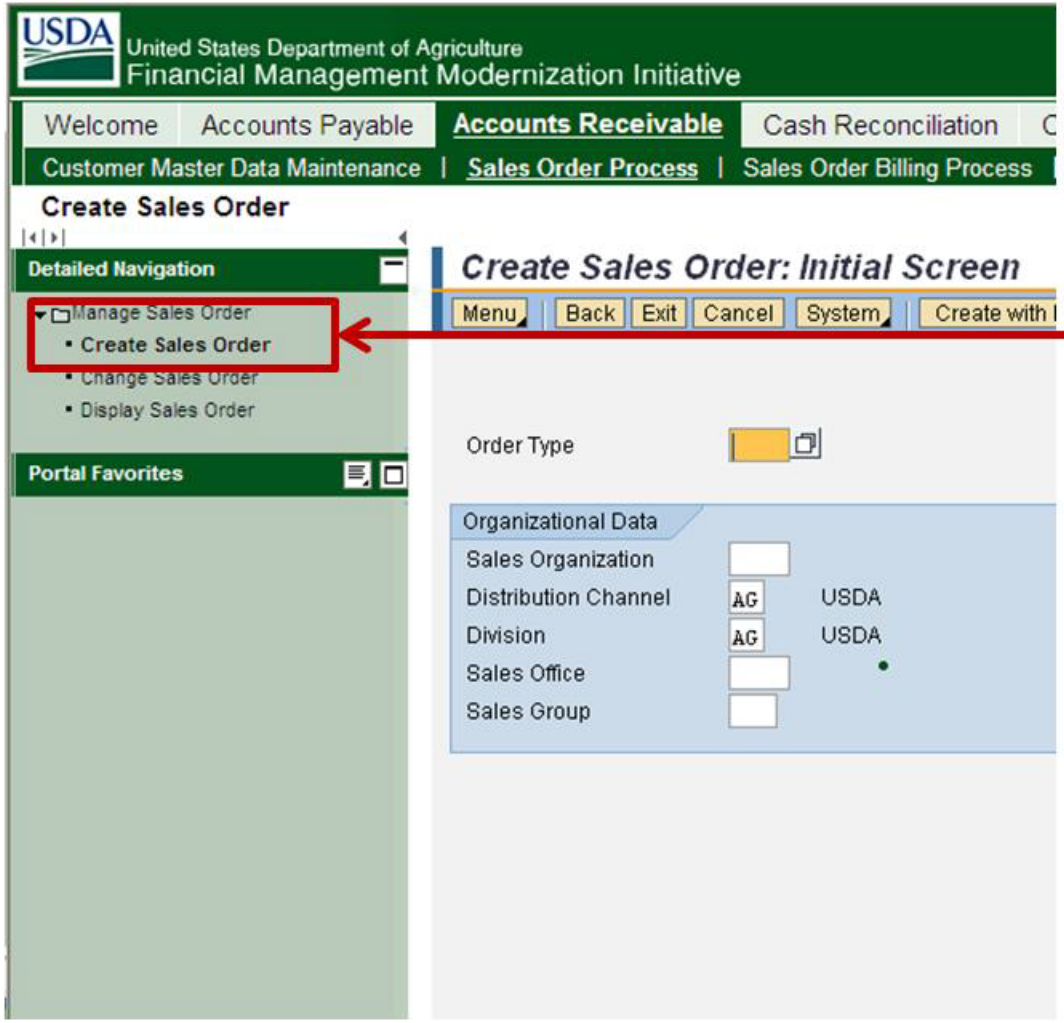
Click the FMMI role (e.g., Sales Order Process) from the first level tab.
All corresponding business activities (e.g., Manage Sales Order) appear on the left navigation panel.

Click the Business Activity



Click the business activity (e.g., Manage Sales Order) from the left navigation panel.
All corresponding tasks (e.g., Create Sales Order) appear under the business activity link.

Click the Task

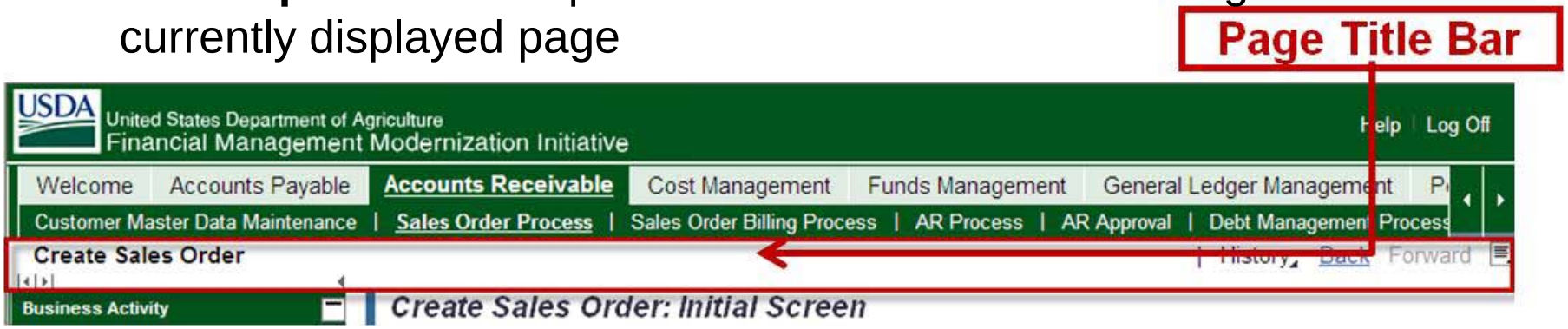


Click the task (e.g., Create Sales Order) from the left navigation panel to make the corresponding transaction appear in the content area.

Page Title Bar

The Page Title bar is located below the Header area. This area displays the transaction the user is in and changes when the user navigates from one page to another. The Page Title bar also includes the History, Back, and Forward links and the More Options icon

- **History** - Displays the past transactions and business activities you have used
- **Back** - Returns you to the previous screen
- **Forward** - Takes you to the next screen
- **More Options** - A dropdown list of action items relating to the currently displayed page

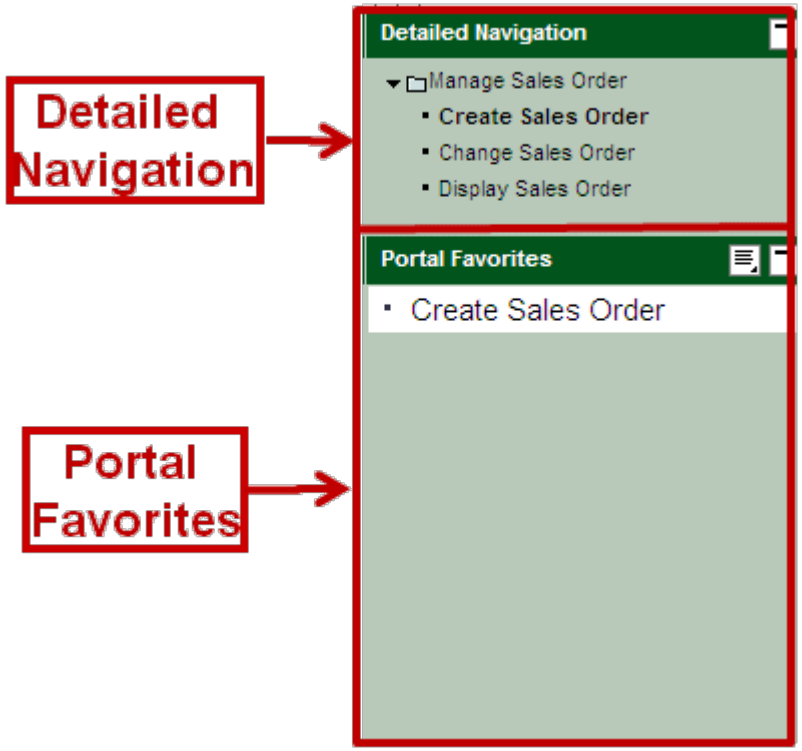


Navigation Panel

The Navigation Panel is located on the left side of the screen. The Navigation Panel is divided into the following areas:

- **Detailed Navigation** - A hierarchical continuation of the top-level navigation. Contains all content below the second-level navigation including business activities folders and task links

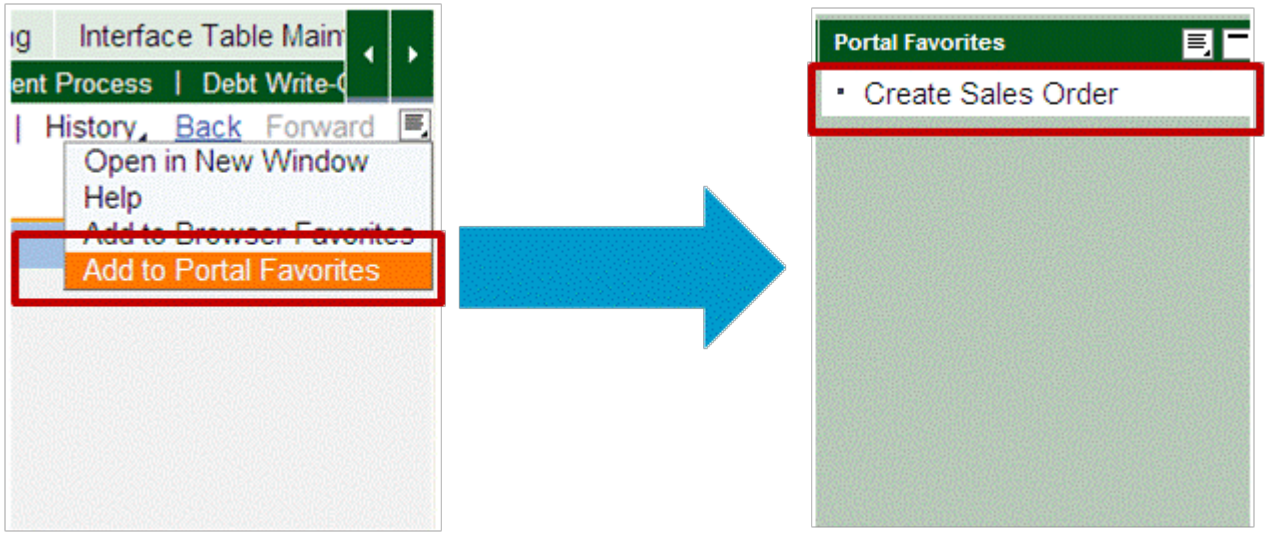
- **Portal Favorites** - Displays personalized content specific to a given FMMI user. The content consists of business activity folders and/or task links that have been added to the portal favorites section by a given FMMI user



Portal Favorites

FMMI allows the user to save most used transactions, reports, etc. as Portal Favorites. Portal Favorites works similar to Internet Favorites.

- From a transaction, click the **More Options** icon
- Select the **Add to Portal Favorites** menu item
- The transaction selected to be added as a favorite appears on the left navigation panel under the Portal Favorites section

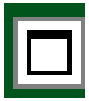


Modify Portal Layout

FMMI allows users to modify the FMMI Portal layout.

- Click the **Collapse Tray** button to collapse the business activity tray
- Click the **Collapse Tray** button to collapse the Portal Favorites tray

- Click the **Expand Tray** button to expand the business activity tray
- Click the **Expand Tray** button to expand the Portal Favorites tray



- Click the **Expand Tray** button to expand the Navigation Panel

- Click the **Collapse Tray** button to collapse the Navigation Panel

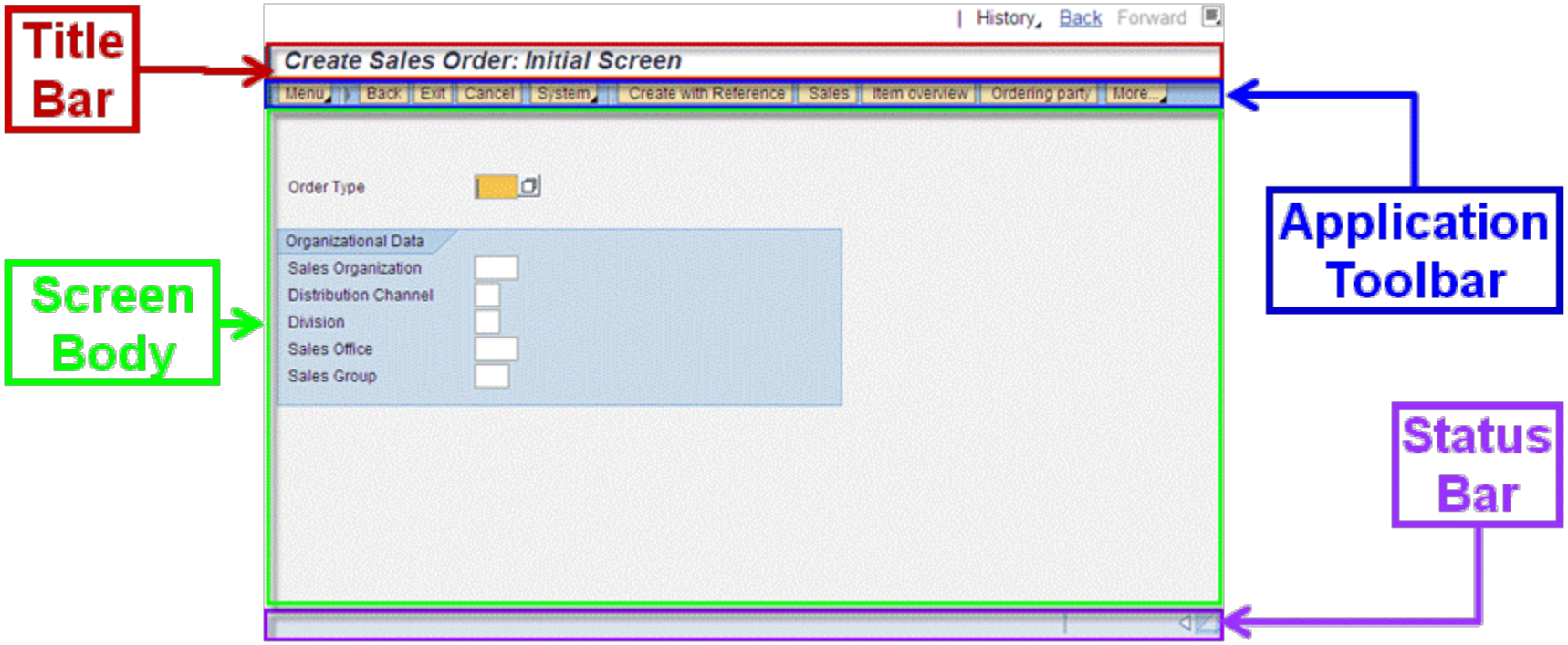
Hands-on Activity

Navigate FMMI Portal

- **Purpose**: Use this procedure to navigate the FMMI Portal
- **Roles**:
  - All Roles

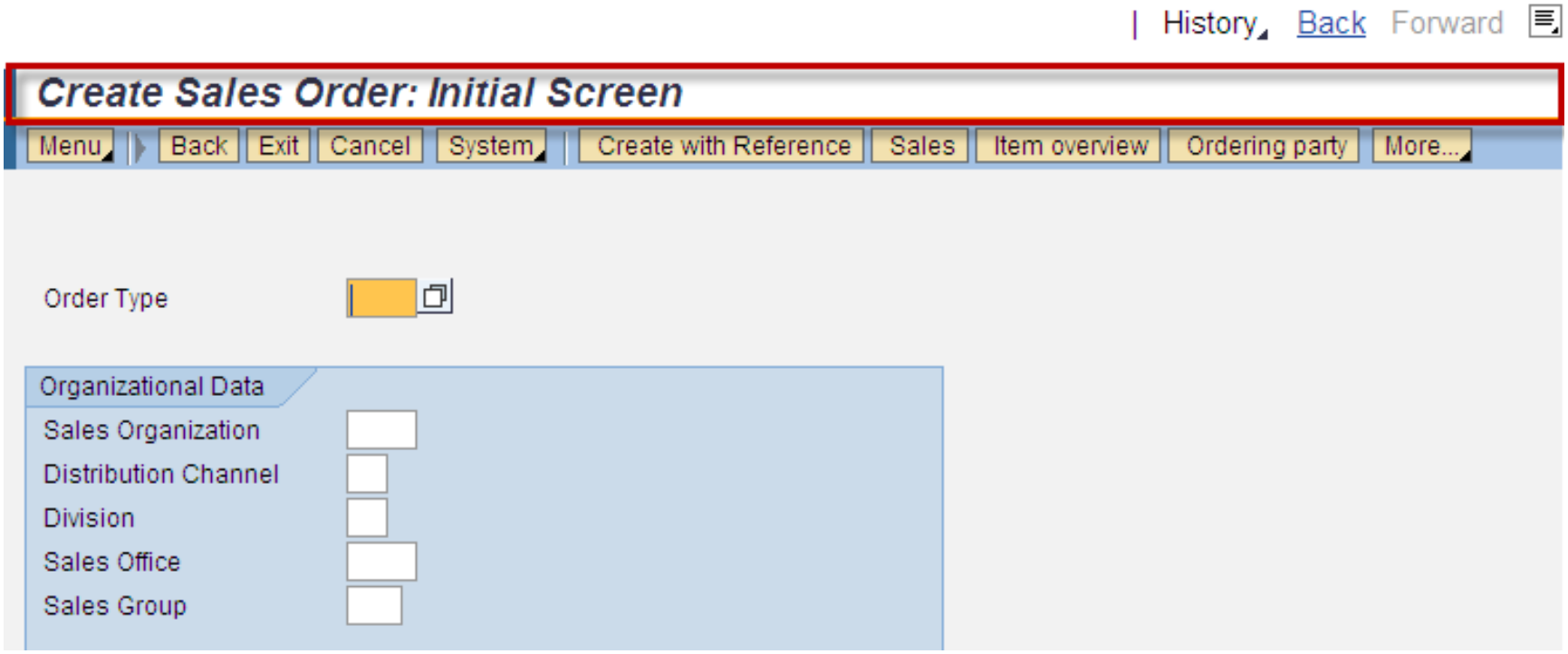
FMMI Screen Components

The FMMI screen includes the following components: Title Bar, Application Toolbar, Screen Body, and Status Bar. However, content available, selections, and icons differ depending on the transaction the user is currently using



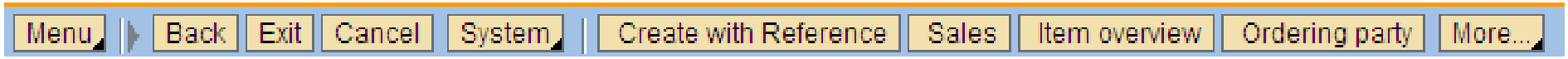
Title Bar

The Title Bar displays name of the transaction the user is working on and the screen within that transaction.



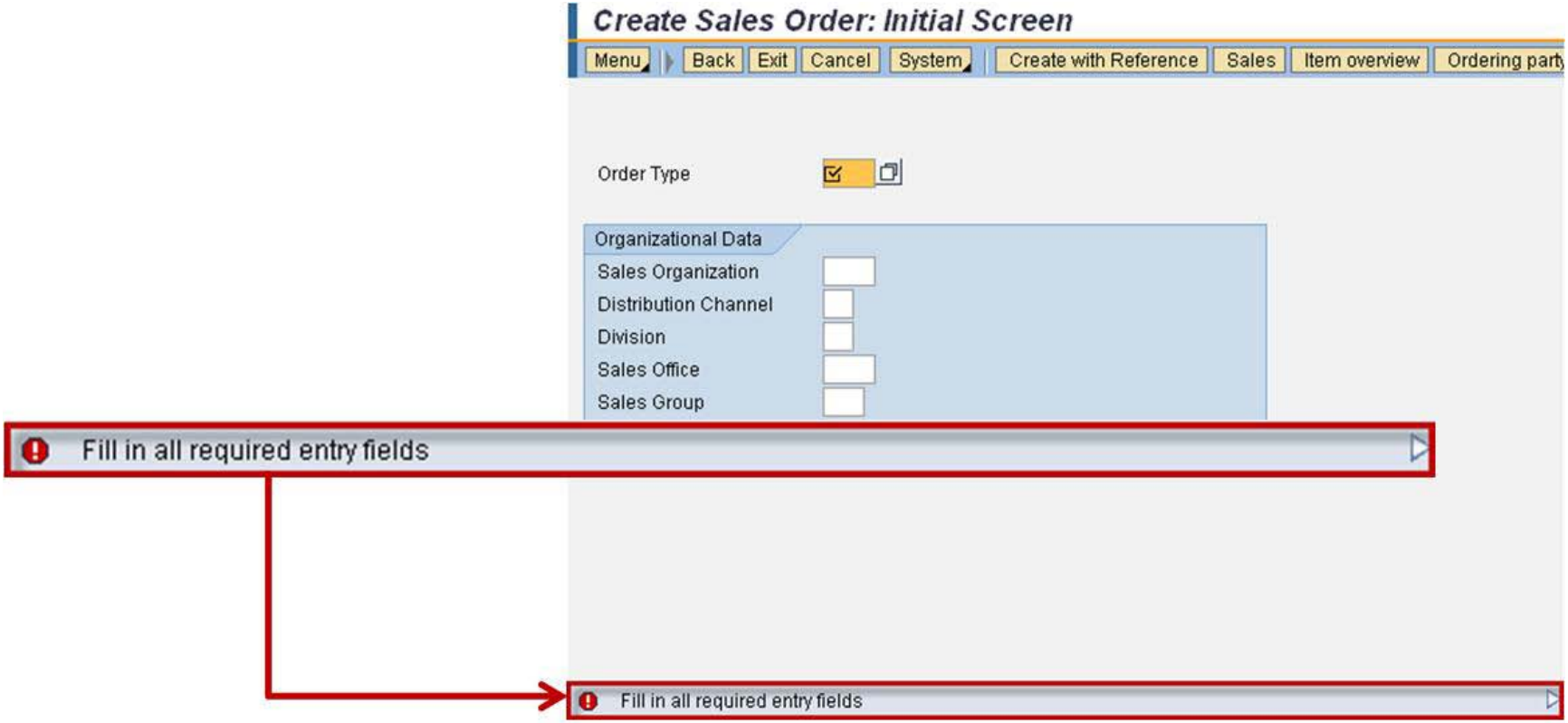
Application Toolbar

The Application Toolbar contains functional buttons and selection bars that pertain only to that screen. These vary based on the transaction you are working on



Status Bar

The Status Bar is located at the bottom of the FMMI screen. FMMI displays system information and status fields on the left side of the Status Bar



Status Bar

The Status Bar contains three types of system messages:

- Warning messages
  - Data may contain errors, but warning messages do not prevent processing a transaction
- Information messages
  - Intended to assist in completing the screen correctly
  - Entry has been accepted and FMMI has been updated
- Error messages
  - Indicates a mistake that must be corrected before proceeding to the next screen

FMMI Screen Elements

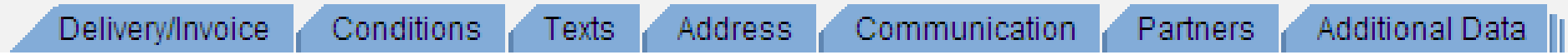
A FMMI screen can contain a wide variety of elements, either for displaying field contents, or for allowing the user to interact with the program. The following are the most frequently used FMMI screen elements:

- Tabs
- Checkboxes
- Radio buttons

FMMI Screen Elements - Tabs

Use tabs to enter, display, and alternate between multiple screens without having to complete all the data. Tabs are arranged in order of importance or in the process order of the transaction

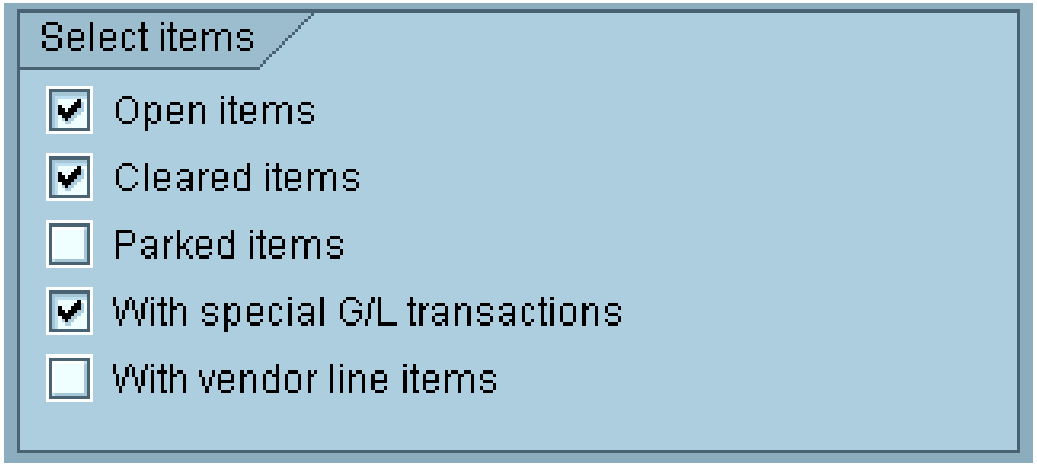
- To access a tab page, select the corresponding tab header
- In the case of longer tabstrips, not all of the tabs appear on the screen. Scroll to the other tabs using the left and right arrows at the top of the tabstrip
- Choose the **More Selections** icon to the right of the tabstrip to display a list of all the tabs on the tabstrip. Select a tab from this list, to move the tab to the foreground



FMMI Screen Elements - Checkboxes

A checkbox consists of a square checkmark element and a descriptive text. Checkboxes are used when users can select one or more options when entering information in FMMI

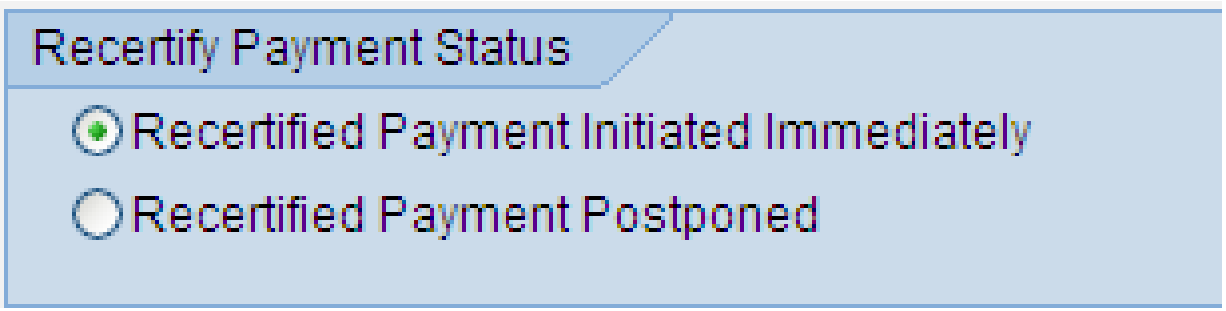
- To select one or more options, click the checkbox next to each desired option. The selected checkboxes now contain a checkmark
- To de-select a checkbox containing a checkmark, click it again and the checkmark disappears



FMMI Screen Elements – Radio Buttons

Radio buttons are used when you can only select one option when entering information in FMMI

- To select an option, click the radio button next to that option. The selected radio button is now filled in
- To change your selection, click a different radio button. The original button is now empty and the new selection is filled in

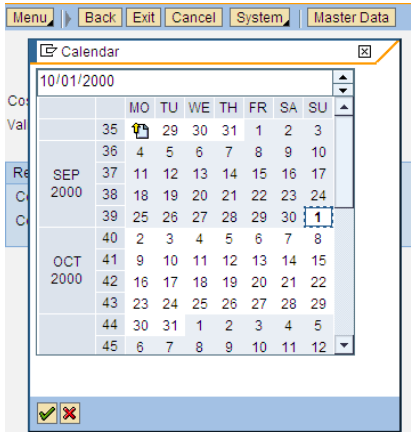


FMMI Fields

Input fields are used in different ways depending on the records and transactions

- Data entry field
  - The rectangle represents an area where data is entered

- Text fields
  - Extended fields where additional information about a transaction is entered
- Date fields
  - Date fields can be filled manually or by using a calendar in FMMI



FMMI Fields Continued

Each screen contains both required and optional data entry fields.

- Active fields are highlighted and the search button is displayed

- Required fields are denoted by a check mark and must be populated in order to process a transaction

- Option fields are not required in order to process a transaction, however provide as much information as possible

- “Grayed out” fields are not accessible often due to view only access or fields that are populated by the system

Hands-on Activity

Navigate FMMI Screens

- **Purpose**: Use this procedure to navigate the FMMI screens
- **Roles**:
  - All Roles

Transaction Overview

- A transaction is a series of screens that enable the completion of specific activities and tasks within the system
- A user may have access to one or multiple transactions
- Transactions allow users to create, change, maintain, display, and produce reports based on data in the system

Working with Data in FMMI

There are two types of data in FMMI:

1. **Master Data:** Fairly static, centrally-stored data records
   - Examples include General Ledger account numbers, cost centers, vendors, and customers
2. **Transaction Data:** Transaction-specific data that uses master data. A single business event such as a purchase requisition or a request for payment creates transactional data
   - Examples include open purchase orders, invoices, and receipt of goods

Create a Transaction

To demonstrate the use of master and transactional data, let's learn how to access a transaction and use some of FMMI functionality. In this module, use the create, change, and display purchase order transactions as examples

Create a Transaction Continued

A purchase order is a formal notification to the vendor requesting a specific good or service. It results in the obligation of funds. To access transaction Create a Purchase Order:

- Click the **Purchasing** tab
- Click the **Purchasing Order Process** tab
- From the Navigation Panel, click the **Process Purchase Orders** business activity link
- Click the and **Create a Purchase Order** task link

Hands-on Activity

FMMI Transaction Attributes: Create

- **Purpose**: Use this procedure to create a standard FMMI transaction
- **Roles**:
  - All Roles

Change a Transaction

To access the following Change a Purchase Order transaction:

- Click the **Purchasing** tab
- Click the **Purchasing Order Process** tab
- From the Navigation Panel, click the **Process Purchase Orders** business activity link
- Click the **Change a Purchase Order** task link

Hands-on Activity

FMMI Transaction Attributes: Change

- **Purpose**: Use this procedure to change a standard FMMI transaction
- **Roles**:
  - All Roles

Display a Transaction

To access the following Display a Purchase Order transaction:

- Click the **Purchasing** tab
- Click the **Purchasing Order Process** tab
- From the Navigation Panel, click the **Process Purchase Orders** business activity link
- Click the **Display a Purchase Order** task link

Hands-on Activity

FMMI Transaction Attributes: Display

- **Purpose**: Use this procedure to display a standard FMMI transaction
- **Roles**:
  - All Roles

Learning Checkpoint Question and Answer (Q&A)

1. Name some capabilities provided by FMMI
2. What is a FMMI User Role and how does it impact you?
3. What is the difference between Master Data and Transactional Data?

Module Summary

In this module, you have learned to:

- Log on and log off the FMMI system
- Identify the layout of the FMMI Portal
- Explain how your role in FMMI determines your data access
- Identify key elements of a FMMI screens
- Identify the various types of system messages
- Explain what is a transaction in FMMI
- Differentiate between Master Data and Transactional Data
- Create, change, and display a transaction

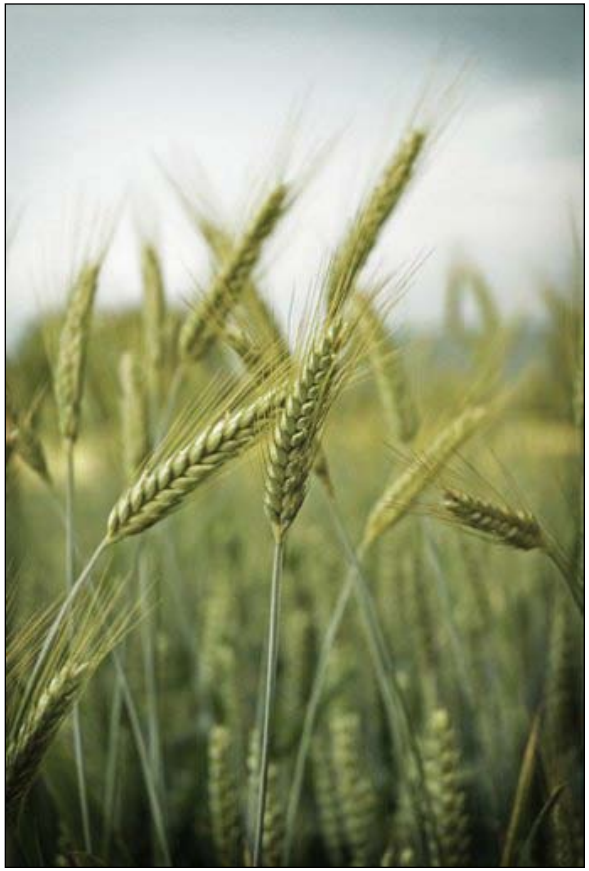
Agenda

- Course Introduction
- Module 1 – Introduction to FMMI Navigation
- Module 2 – FMMI Navigation
- **Module 3 – FMMI Online Help Navigation**
- Module 4 – FMMI Queries and Reports
- Course Summary
- Course Evaluation

Module Objectives

After completing this module, you will be able to:

- Navigate Online Help



Key Terminology

Let's review the following terms and definitions before beginning the FMMI Online Help Navigation module:

- **Context-sensitive**: Displays documentation for the particular feature/transaction that the user is using
- **FMMI Online Help Main Page**: Displays categories by which the content on Online Help is organized
- **Online Help Procedures (OLHP)**: OLHPs provide step-by-step instructions on how to complete a specific transactions. The document contains screen shots, steps, and required fields that need to be entered in order to complete the transaction
- **Simulation**: Application tutorials are simulated activities that provide you a safe environment to practice and learn how to process transactions in FMMI

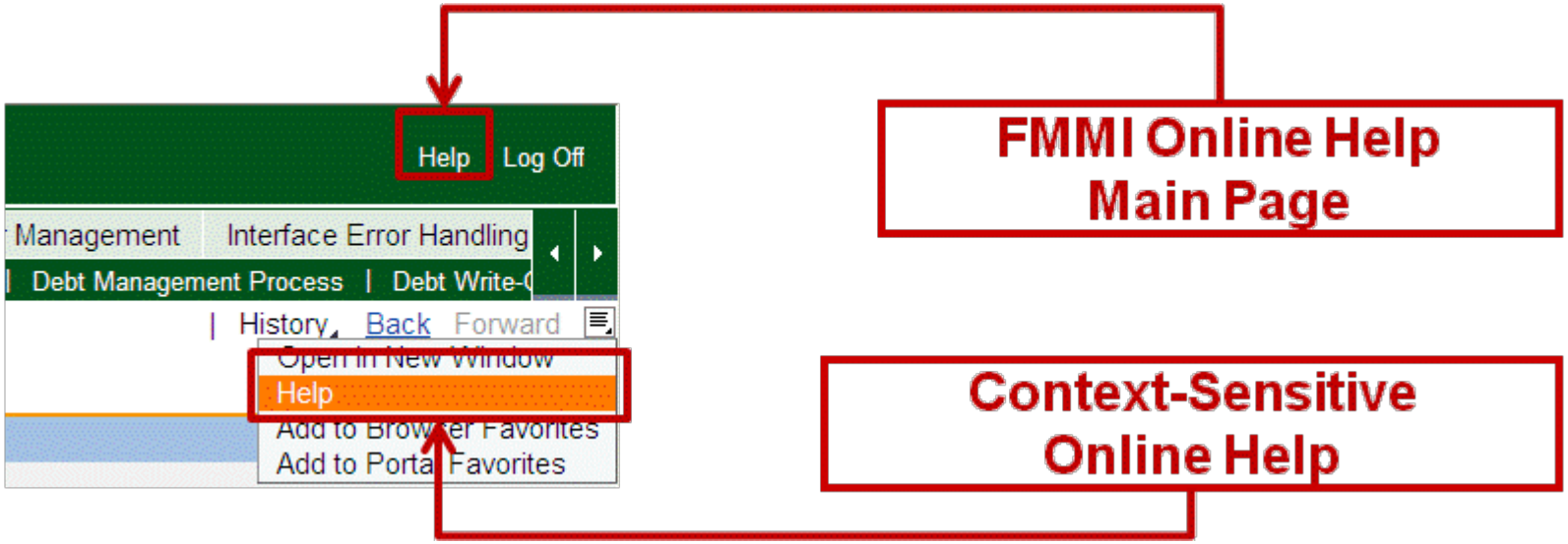
FMMI Online Help

FMMI Online Help (OLH) is a web-based tool that provides users with online documentation and specific help for the FMMI system and transactions

- Provides a repository of useful information specific to FMMI's business processes and configuration
- Hosts the training and performance support materials
- Available to FMMI users during training and post go-live
- Launches any type of format or content to provide context-sensitive help for individual transactions or screens
- Allows display of multiple items for one transaction or one item for multiple transactions

FMMI Online Help Access

Access FMMI Online Help from the Help button and the More Options button



FMMI Online Help Main Page

The FMMI Online Help Main Page displays information in the following areas:

Online Help Procedures, Simulations, and Job Aids by Process Area (e.g., Accounts Receivable)	Online Help Procedures, Simulations, and Job Aids by Material Type (e.g., Participant Guide)	FMMI Training Materials
– 01 - Performance Support Materials by Role – 02- Online Help Procedures and Simulations – 03 - Job Aids (Alpha) – 04 – Participant Guide	– Job Aids – O&M Materials – Participant Guides – Simulations and Online Help Procedures	– 100 Level – 200 Level – 300 Level – 400 Level – Multi-course Offerings

Context-Sensitive Help Page

The Context-Sensitive Help Page displays documentation for the particular transaction that the user is using

- Simulations
- Online Help Procedures

Hands-on Activity

Navigate FMMI Online Help

- **Purpose**: Use this procedure to navigate FMMI Online Help
- **Roles**:
  - All Roles

Learning Checkpoint Question and Answer (Q&A)

1. What is FMMI Online Help?
2. What are the two ways to access the FMMI Online Help?

Module Summary

In this module, you have learned to:

- Navigate the Online Help

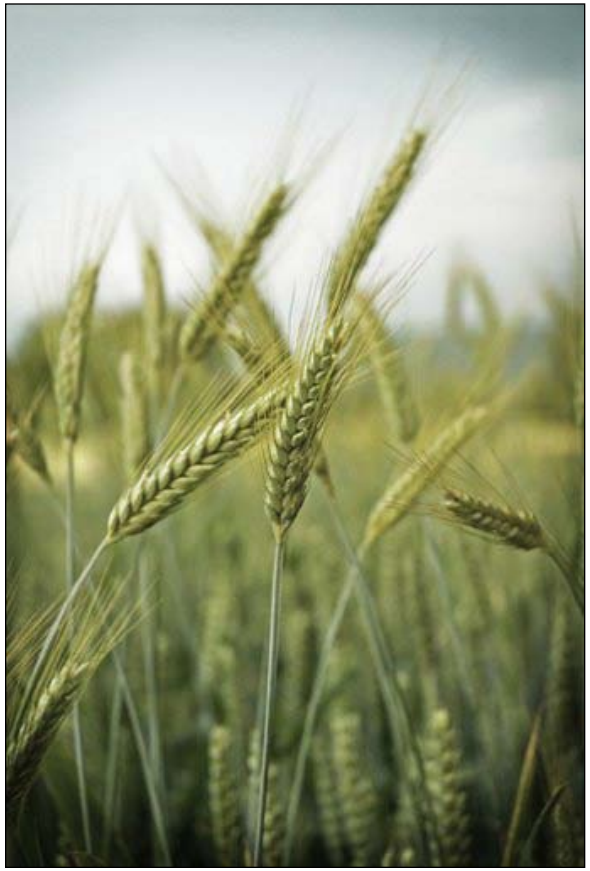
Agenda

- Course Introduction
- Module 1 – Introduction to FMMI Navigation
- Module 2 – FMMI Navigation
- Module 3 – FMMI Online Help Website
- **Module 4 – FMMI Queries and Reports**
- Course Summary
- Course Evaluation

Module Objectives

After completing this module, you will be able to:

- Define reporting parameters
- Explain the use of multiple selections
- Set up a report variant
- Execute a report
- Explain drill down capabilities
- Change report layout
- Export reports to Microsoft Excel
- Print reports



Key Terminology

Let's review the following terms and definitions before beginning the FMMI Queries and Reports module:

- **Drill-down**: Allows users to see an additional detail for a given figure or line item
- **Parameter**: Set of criteria that determine the content of a report
- **Variant**: A collection of saved parameters, such as the setting for a particular table or a set of report selection criteria. Variants allow users to save repeatedly used data without having to re-enter

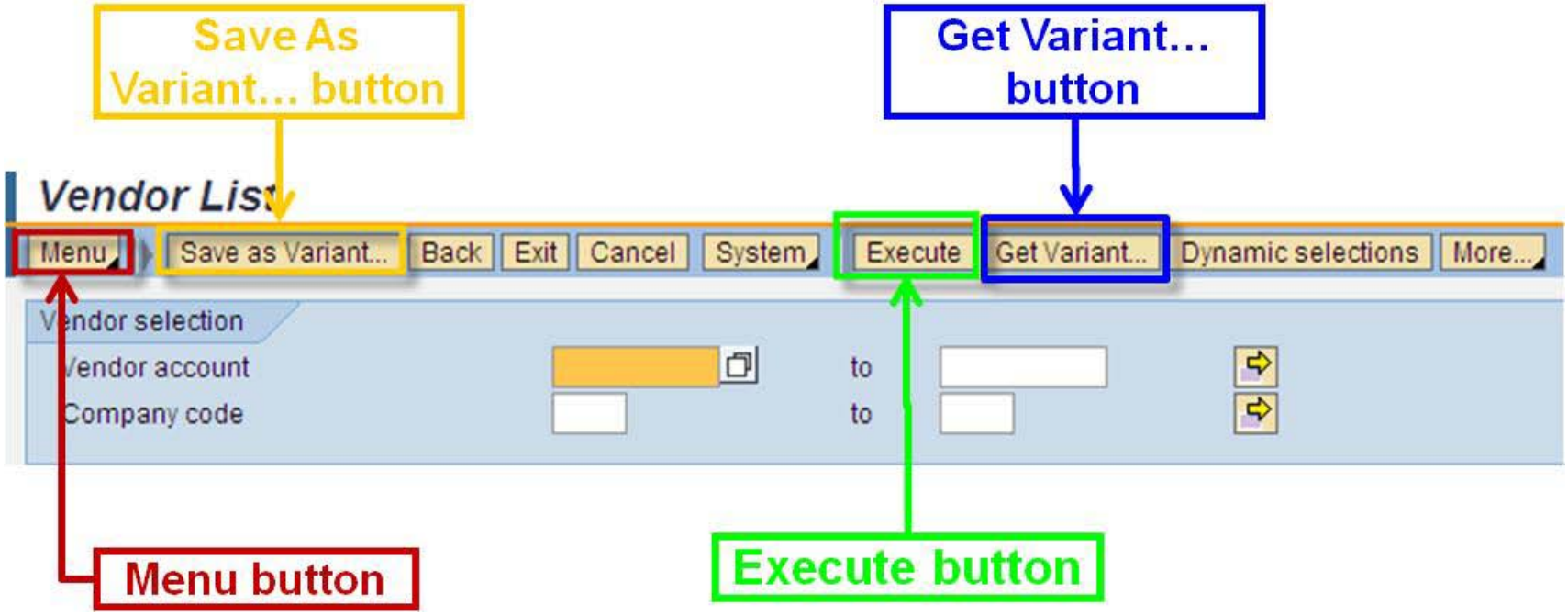
ECC Reporting

SAP Enterprise Central Component (ECC) reports are standard SAP reports that have been configured for the purposes of the FMMI implementation

- FMMI user roles drive the access to the reports
- The standard reports are listed under each of the FMMI Reporter roles for each corresponding area
- Reports are available across various functional areas and various transactions
- SAP ECC Reports are real-time

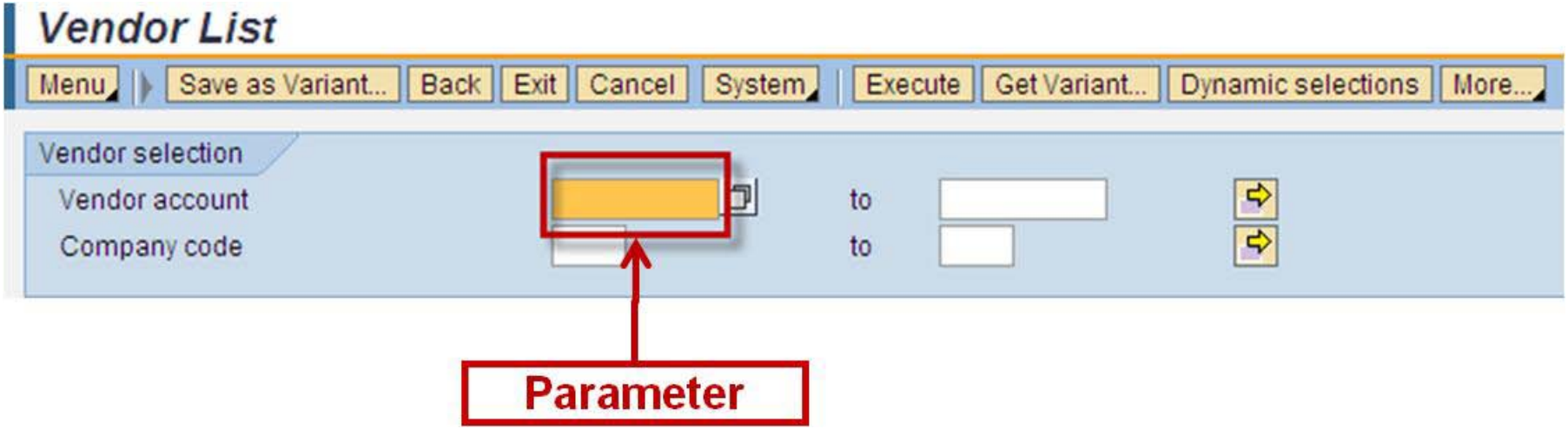
Main Screen Elements of ECC Reporting

ECC reporting screens include the following components: Menu, Save as Variant, Execute, and Get Variant. However, content available selections, and icons differ depending on the report the user is currently using



Parameters

A parameter is a set of criteria that determines the content of a report



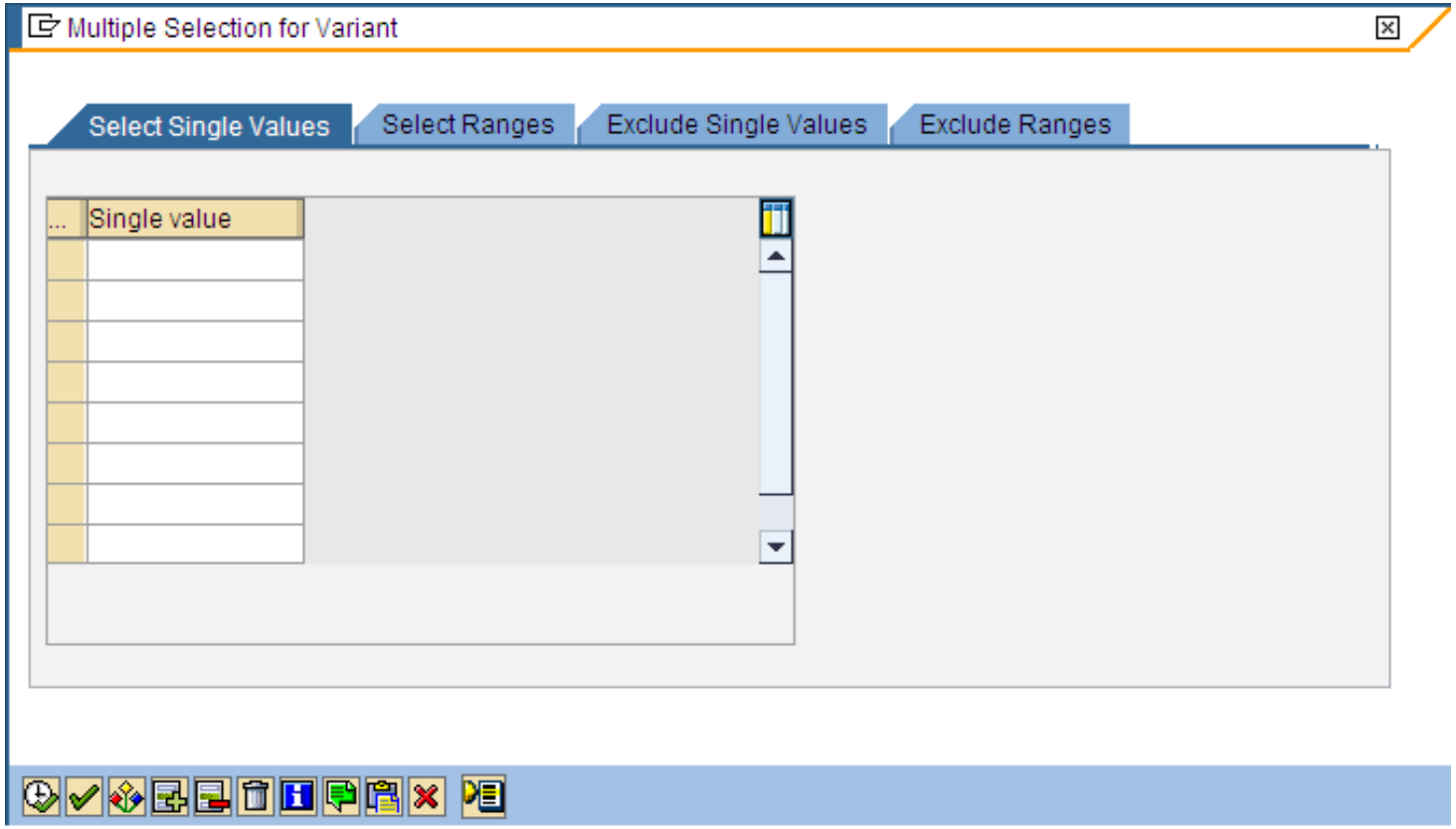
Search: Using Wildcards

Search is used to find information, a specific record, or a specific field entry based on a characteristic of the information. When searching for information in FMMI, use asterisk symbol as a wildcard character

- Type any part of the name surrounded by wildcards
  - E.g., typing "*ConAgra*" in the Customer field returns all accounts containing ConAgra, including ConAgra and ConAgra Foods
- Type in the first part of a name, followed by the wildcard
  - E.g., typing "Su*" return a list of contacts whose names start with Su. For example, Susan Hammond, Sue Lowe
- Type a wildcard followed by the last part of a name
  - E.g., typing "*Smith" return a list of contacts who last name contains the criteria. For example, BookSmith, LearningSmith, and Smith

Multiple Selection

Multiple selection options allow users to enter different variations of numbers or values or ranges when parameters are set for a report



Variants

A variant is a collection of saved parameters, such as the settings for a particular table or a set of report selection criteria

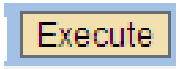
- Save values entered into selection fields on a report using variants
- Use a variant to run similar reports to save time
- Create several variants for the same report, each one containing different values
- Click the **Save as Variant** button to save the key fields

Variants Continued

- To identify variants, type in part of a username as the last digits of the variant name or use a name in the Description field
- Other users may be able to see your variants; however, if they do not have the same authorizations to view the objects you have selected, FMMI will not display the data entry
- To use a saved variant
  - Click the **Menu** button
  - Scroll down to the **Goto** button
  - Select **Variants** and select the desired variant

Execute a Report

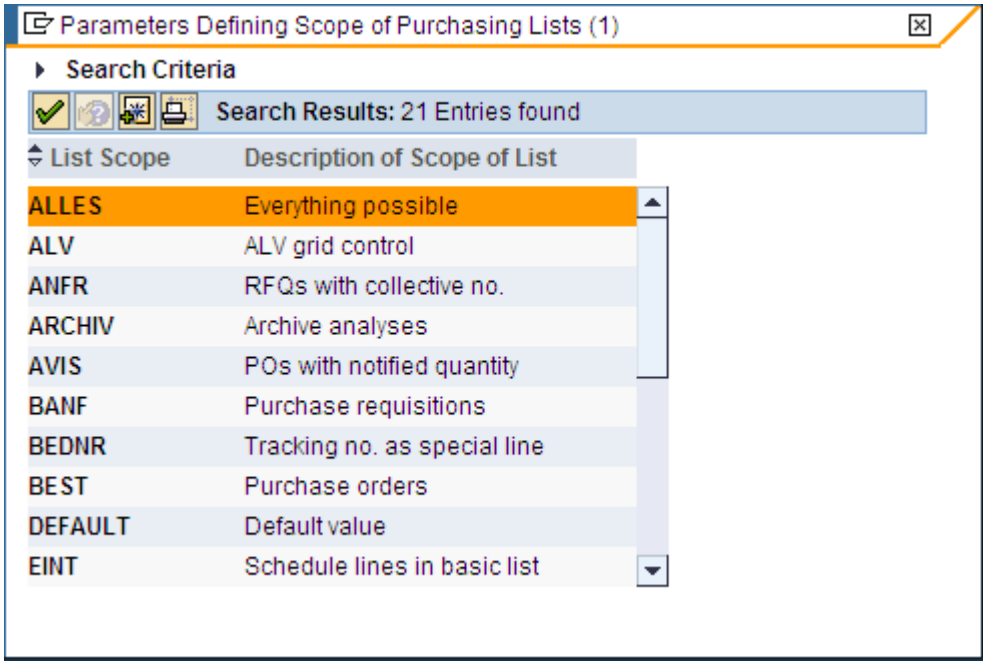
To begin reporting, let's learn how to access an ECC report and run some of the reporting functionality. In this module, use the Purchasing Document per Vendor Report as an on-going example

- To access this report
  - Click the **Purchasing** tab
  - Click the **Reports** tab
  - Click the **Purchasing Document per Vendor Report** link
  - Click the **Execute** button 

Report Output

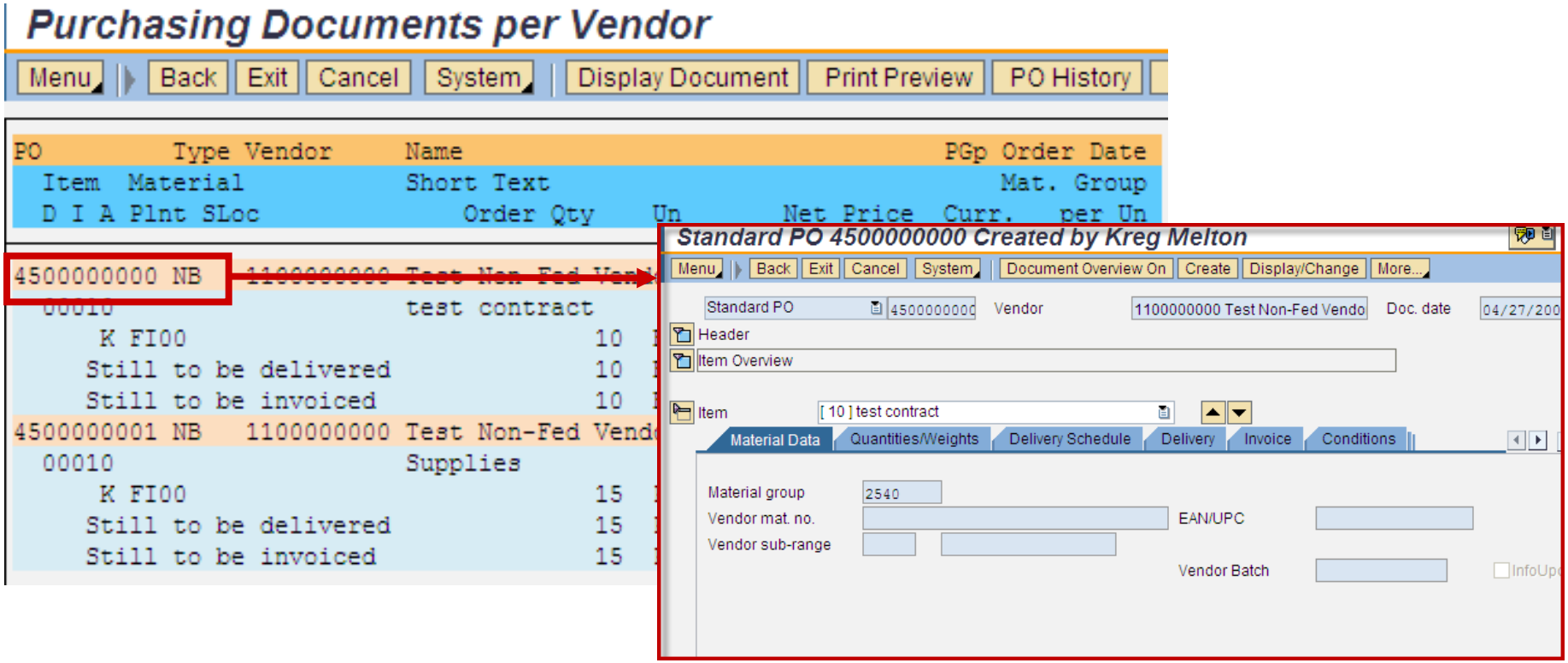
To manipulate the output of a report, perform the following:

- Highlight the **Scope of List** field
- Click the **Search** button
- Highlight the chosen output
- Click the **Select** button



Drill-Down Capabilities

Drill-down in an ECC Report to break down general figures into smaller details



Hands-on Activity

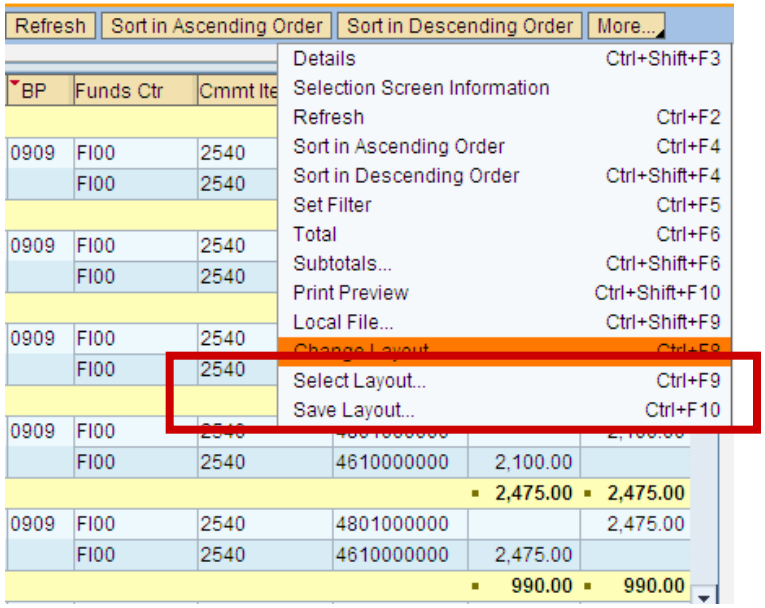
Execute Standard Report

- **Purpose**: Use this procedure to execute a standard FMMI report
- **Roles**:
  - All Roles

Modify Report Layout

The reports in the SAP standard system provide a wide range of information. Limit or expand this information in some reports to the data that applies to a specific question or cost analysis. Create different layouts of the information

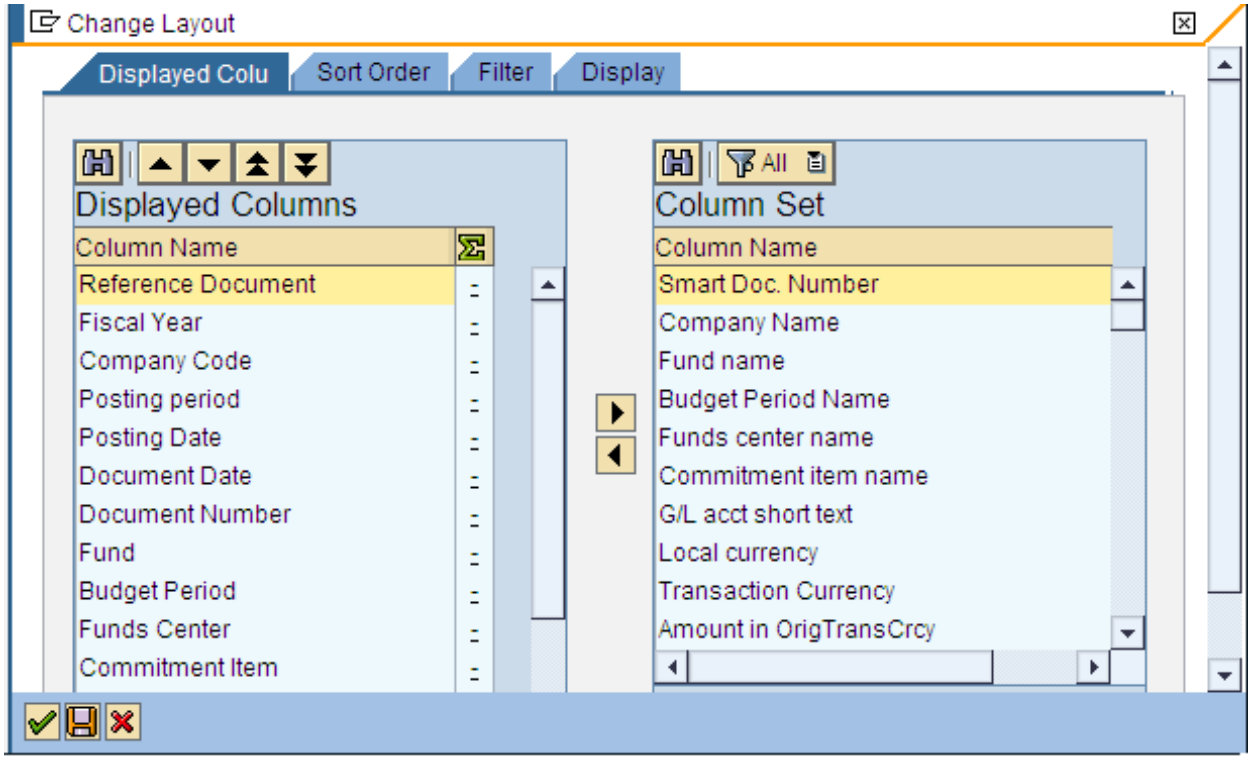
- Click the **More** button
- Select the **Change Layout** menu item
- Modify Report Layout



Modify Report Layout Continued

If the information provided in the layouts is not sufficient for your purposes, you can modify them or create custom layouts

- Displayed Columns
- Sort Criteria
- Filter Criteria
- Display



Hands-on Activity

Modify Report Layout

- **Purpose**: Use this procedure to modify a FMMI report
- **Roles**:
  - All Roles

Export Report to Microsoft Excel

Reports can be downloaded in FMMI and saved to a computer. To save a report to a computer:

- From the report, Click the **Menu** button
- Click the **System** button
- Click the **List** button
- Select the **Save > Local File** menu item
- In the **Save list in file** pop-up window, select “spreadsheet” or the appropriate format to save the report
- Press the **Enter** button
- Click **Yes** to any warning windows that may appear
- Select the save location and type the desired file name for the report
- Click the **Generate** button to save the file

Hands-on Activity

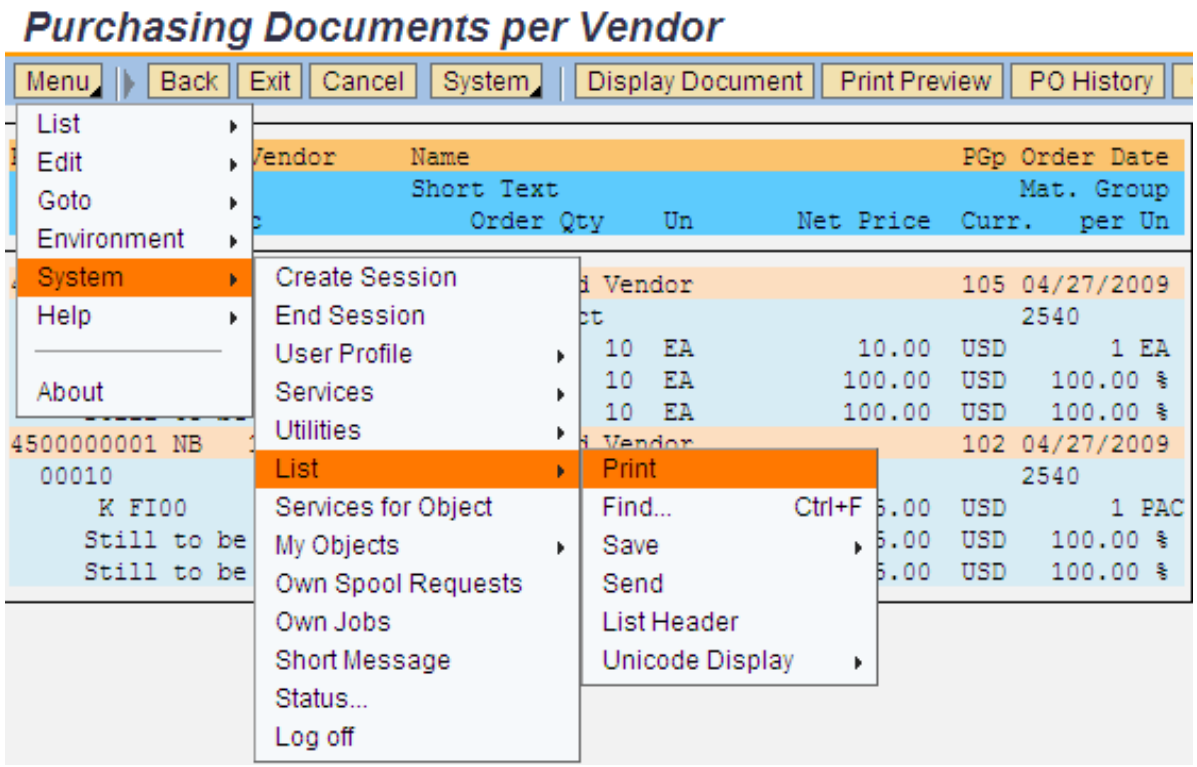
Export Report to Microsoft Excel

- **Purpose**: Use this procedure to export a report to Microsoft Excel
- **Roles**:
  - All Roles

Print ECC Reports

ECC Reports can be printed as required

- Click the **Menu** button
- Select **System**
- Select **List**
- Select **Print**



Learning Checkpoint Question and Answer (Q&A)

1. What are reporting parameters?
2. Explain the use of multiple selections
3. What are variants used for?

Module Summary

In this module, you have learned to:

- Define reporting parameters
- Explain the use of multiple selections
- Set up a report variant
- Execute a report
- Explain drill down capabilities
- Change report layout
- Export reports to Microsoft Excel
- Print reports

Agenda

- Course Introduction
- Module 1 – Introduction to FMMI Navigation
- Module 2 – FMMI Navigation
- Module 3 – FMMI Online Help Navigation
- Module 4 – FMMI Queries and Reports
- **Course Summary**
- Course Evaluation

Course Summary

In this course, you have learned to:

- Describe SAP and identify SAP modules used by FMMI
- Explain the key SAP and FMMI terms and concepts
- Navigate the FMMI Portal
- Explain the difference between master data and transactional data
- Manage favorites
- Describe the screen elements and types of fields
- Perform searches in FMMI
- Navigate Online Help
- Run FMMI reports

Additional Support

- FMMI Communications
- SAP Help and FMMI Online Help
- Job Aids
- Coaching from Agency/Staff Office Subject Matter Experts (SMEs)
- FMMI Help Desk

Online Help Procedures (OLHP)

Related Online Help Procedures (OLHP) include:

- Log On Log Off FMMI
- Navigate FMMI Portal
- Navigate FMMI Screens
- Create Transaction
- Display Transaction
- Change Transaction
- Navigate FMMI Online Help
- Execute a Standard Report
- Modify Report Layout
- Export Report to Microsoft Excel

Course Completion

Congratulations, you have completed :

FMMI 301 – FMMI Portal and SAP Navigation

To ensure that your FMMI training curriculum is updated and you receive credit for completing the course, please click the link below to complete the course completion form.

Course Completion

Agenda

- Course Introduction
- Module 1 – Introduction to FMMI Navigation
- Module 2 – FMMI Navigation
- Module 3 – FMMI Online Help Navigation
- Module 4 – FMMI Queries and Reports
- Course Summary
- **Course Evaluation**

Course Evaluation

- In our efforts to continuously improve FMMI Training, please complete the course evaluation
- The FMMI team uses the results of evaluations to determine the overall effectiveness of the training program and identity improvements for future sessions
  - Your answers will remain confidential but you may also provide your name if desired
- The evaluation can be accessed at the following link:

Course Survey