

Finance Systems and Access

Introduction

In this section of the Best Practices Handbook we intend to explain the general systems and workflows used by schools and departments within the Boston University community.



There are four key elements of systems and access

1. SAP
2. BUworks Central Portal
 - 2a. WebGui
3. Additional systems
 - 3a. Concur
 - 3b. Procurement (SRM)
 - 3c. Internal Service Request (ISR)
 - 3d. Facilities Service Request (FSR)
 - 3e. The Links
 - 3f. Terrier Temps
 - 3g. PCard
4. Access and workflow



Helpful Links

[Finance/HR/ Procurement Systems](#)



Finance Systems and Access

1. SAP

SAP (System, Application & Products in Data Processing) is one of the largest vendors of enterprise resource planning (ERP) software in the world. The SAP ERP system enables its customers to run their business operation (including accounting, finance and human resources) in one integrated environment, and in real time.

On July 1st, 2011, Boston University employed SAP as its primary platform for accessing different data and applications, replacing many of the independent systems formerly in use, including parts of Galaxy, Employee Link and Business Link.

Three things you may not know about SAP

- SAP was founded in 1972 by 5 former IBM engineers in Germany
- SAP initially stood for Systemanalyse und Programmentwicklung or "System Analysis and Program Development"
- SAP completed the acquisition of Concur Technologies in December 2014

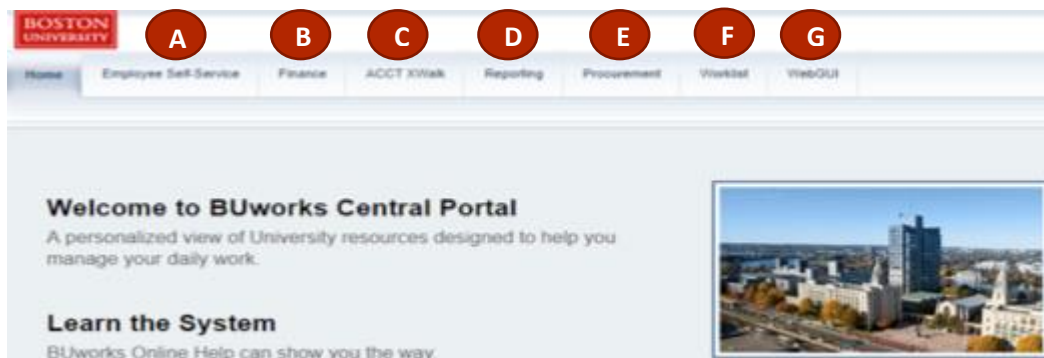


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2. BUworks Central Portal

BUworks is Boston University’s integrated SAP ERP system designed to provide administrators and faculty with more efficient financial management, human capital management, and procurement capabilities. BUworks improves our ability to plan and manage by fostering collaboration and consistency of information.

The many tabs you will find when logging into BUWorks represent the functions that can be performed within the system and will vary depending on the user’s role and responsibilities at the School of Public Health. A brief description of these tabs is provided below.



- A. Employee Self Service- provides easy access to information and service for employees
- B. Finance- provides access to Finance portal functions. Most are restricted to Central users and ISR providers
- C. ACCT Xwalk- Provides a translator to convert account information from legacy ACK to SAP and from SAP to legacy ACK
- D. Reporting- provides access to Business Warehouse (BW) reports for each of the BUworks functional areas
- E. Procurement- provides access to procurement functions
- F. Worklist- shows Task, Alerts, Notifications, and Tracking for workflow items
- G. WebGUI- provides direct access to SAP EEC. (see next page for additional information)

Helpful Links

- [BUworks Details](#)
- [Introduction to BUworks Central](#)

TIP: There are two ways to access BUworks Central Portal.

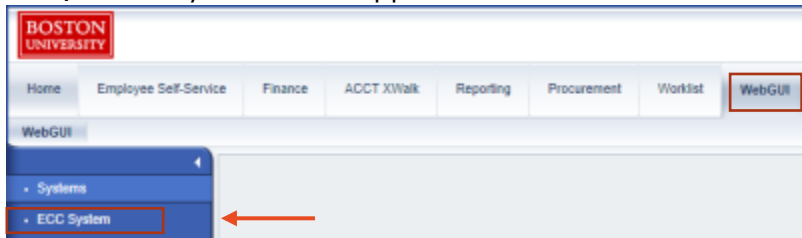
- 1) Go to www.bu.edu/buworks/ and click on the “Launch” button
- 2) Go to www.bu.edu, click on “Staff” and click on BUworks Central

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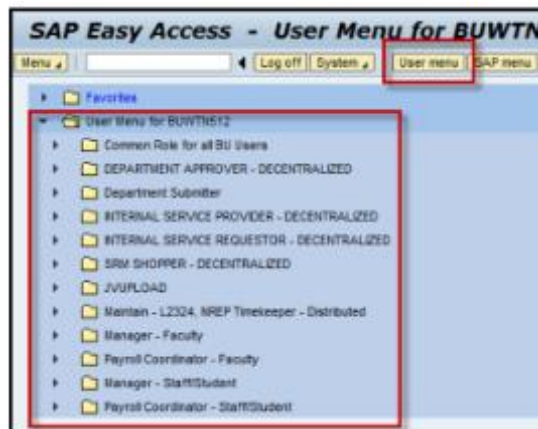
2a. WebGui

WebGUI is accessed through BUworks and provides direct access to SAP EEC. This is where Boston University's General Ledger resides and where transactions are created and displayed in real time.

Once ECC System is pressed, SAP Easy Access will appear.



Within the User Menu, you will see a list a specific SAP transactions codes (t-codes) that relates to your role and responsibilities within the School of Public Health.



For additional information about transaction codes (T-codes) and guidance on how to use SAP Easy Access, please contact the SPH Finance and Administration Department.

Helpful Links

[Intro to WebGUI Presentation](#)

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3. Additional systems

Boston University has a multitude of additional systems that are accessed through BUworks and linked to SAP.

a. Concur

Concur is a digital solution that BU purchased and uses as their travel and expense management system. It allows for easy online bookings for travel, increased visibility into expenses, and quick reimbursement turnarounds for out of pocket expenditures.

For additional information about Concur and how to book your travel and out of pocket expenses, please visit the [Travel & Concur](#) section of this Handbook.

b. Procurement (SRM)

Procurement is accessed through BUworks, which provides a set of SAP and third party applications designed to integrate the University's procurement processes. These functions provide purchasing services to employees, enabling them to procure goods and services to support the University's business.

For additional information about Procurement (SRM) and the different methods of purchasing available to SPH employees, please visit the [Purchasing](#) section of this Handbook.

c. Internal Service Request (ISR)

An Internal Service Request (ISR) is used by departments to request goods or services from other Boston University departments. Internal Services include University-owned service providers (e.g., Publications Production), as well as contracted suppliers located on campus (e.g., Dining Services/Aramark).

For additional information on how to create an ISR, please visit the [Purchasing](#) section of this Handbook.

d. Facilities Service Request (FSR)

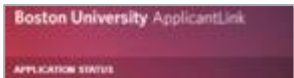
A Facilities Service Request (FSR) is used by departments to request services from the Facilities Management & Planning department at Boston University. Facility Services Include: Renovation requests; event set-up; classroom supplies and services; snow removal; security systems; telephone and data network services; parking and towing.

For additional information on how to create an FSR, please visit the [Purchasing](#) section of this Handbook.

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3e. The Links

[The Links](#) is a collection of portals that provide secure access to online services and confidential information for appropriate users. Students, faculty, staff, alumni, and applicants for admission all enjoy one-stop access to the services they need, through The Links.



- Applicant Link - applicants for admission to undergraduate studies at Boston University use this service to view the latest information about their application.



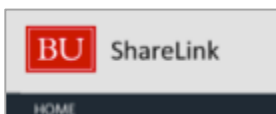
- Business Link - provides a view of historical Financial and Sourcing and Procurement systems (through FY 2011) and full administrative functions for Auxiliary Services, Student Employment, Undergraduate Admissions, etc.



- Faculty Link - provides faculty access to class schedules, class lists, advisee lists, and final exam schedules, as well as academic and contact information for students in their current classes. In addition, faculty can initiate the automatic generation of course sites, post final grades for their courses, send email to a class list, and perform other functions.



- Faculty/Staff Link - provides authorized school & college administrators' access to information and functions pertaining to student lists, instructors' schedules, past University schedules, and other academic areas.



- ShareLink - provides secure access to those parents, employers, and other interested third parties a student has authorized to view the student's academic and financial information.



- Student Link - enables students to view their personal, academic, financial and other information relevant to their studies at Boston University.

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3e. The Links (continued)

business link

[BUworks Central portal](#)

[Account Status through FY2011](#)

[Accounts Payable through FY2011](#)

[BU Today](#)

[Compliance Tracking](#)

[Credit Card Office Payment/Refund](#)

[Electronic Authorization](#)

[Faculty Comments – Now in BUWorks Central \(\[instructions\]\(#\)\)](#)

[Faculty/Staff Link](#)

[Faculty/Staff Search](#)

[FitRec Membership Admin](#)

[Give the Point!](#)

[Housing](#)

[Mail Maker](#)

[Medical Campus Transportation Services](#)

[Online Requisition through FY2011](#)

[Parking Services](#)

[Payroll/Personnel](#)

[PERD Admin](#)

[PRIME](#)

[Student Employment](#)

[UIS Electronic Report Viewer \(EOS Thin Client\)](#)

[User Guide](#) [Report Transformation Guide](#)

[UIS Mainframe File Services](#)

[Vending Services](#)

[WebSpace \(Building Space Inventory\)](#)

The main sites within business link are

Account status through FY2011 – This allows you to view pre-SAP account data (prior to FY2011)

Payroll/Personnel – This allows you to view payroll records pre-SAP (prior to FY2011)

Student employment - This is the main hub where all student employment is done. In here you can do the following

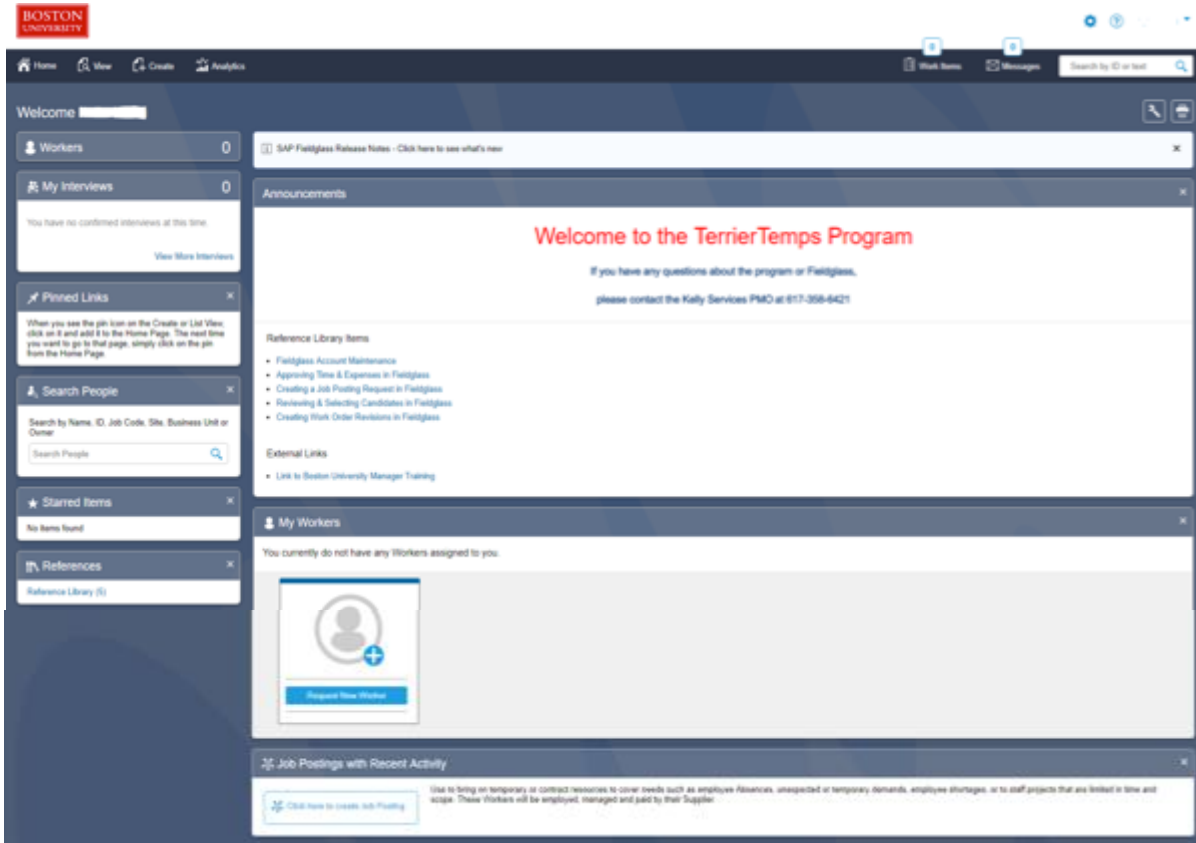
- Hire a student
- Terminate a student
- Approve/edit timesheets
- Adjust/view student's pay rate
- Enter/view the student's start and end date
- Change/view how the student is being paid (i.e., grant)
- I-g link for departments to complete
- Review student job listing

TIP: View the Payroll Essentials in Best Practices Handbook (link coming soon) to get an in-depth walk through of how to hire student employees.

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3f. TerrierTemps

TerrierTemps is accessed within the Procurement tab in BUworks. TerrierTemps is Boston University's contingent workforce management program. It leverages the staffing management expertise of Kelly Services and the industry leading web-based technology of Fieldglass.



Helpful Links

- [TerrierTemps - Shoppers Guide](#)
- [TerrierTemps - Getting Started](#)

TIP: All requests for temporary labor through staffing agencies must be submitted through the TerrierTemps program.

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3g. PCard

The Boston University Purchasing Card (PCard) Program is designed to provide an efficient means of making routine purchases by reducing paperwork, allowing control and responsibility at the school or department level, and streamlining the purchasing cycle for low-dollar purchases.



Once you have gone through the proper steps of obtaining a PCard, you will receive a welcome email from Works (worksno-reply@works.com). The email will contain a link to the Works Site (shown below). This is the site where PCard transactions are managed, allocated, edited, etc. Your Username on the Works site will be your UID.

Bank of America Merrill Lynch | **Works**

About Works

The Works application is a Web-based, user-friendly electronic card payment management service that automates, streamlines, and integrates existing payment authorization and reconciliation processes while providing management reporting and spending controls.

- Offers card program management, reconciliation and workflow approval in a single application
- Provides simple, effective and timely controls to help manage your reconciliation policy and company spend
- Utilizes a built-in supplier network of millions of merchants worldwide
- Encourages cardholders to control spending and comply with company policy
- Increases your process and spending controls
- Automates expense approval and allocation
- Simplifies management reporting and audit activities

If you would like more information about Works and how to purchase it, please contact your Card products Account Representative. If you do not have one, you can request to be contacted through our website: [Bank of America Card Solutions](#)

Login to Works

Email:

Login Name:

Password:

[Forgot your password?](#)

Need more help? Please contact your Program Administrator for assistance.

[Privacy & Security](#) [Recommended Settings](#) [About SSL Certificates](#)

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Helpful Links

[PCard Polices/Procedures](#)

[BPHB-Purchasing](#)

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4. Access and workflow

At Boston University, Departmental Security Administrators (DSAs) are responsible for managing the mainframe accounts of schools, offices or colleges and for requesting access that is appropriate for the business role of that account.

To request access to the different systems available at the School of Public Health, please contact the following individuals

Name	Email Address	Phone Number
John Wright, Director of Finance	johnjw@bu.edu	617-358-1911
Veronica Byam, Assistant Director of Finance	vbyam@bu.edu	617-358-3223

Concur

Full time faculty and staff (paid through the University payroll system) are eligible Travel Card users. To obtain a travel card, please provide the completed credit card application to the Finance & Administration Department. Once the form is submitted, the Travel Department will be in contact with the employee to provide instructions to move forward. For more details, please see [BPHB-Purchasing](#).

PCard

Full time faculty and staff (paid through the University payroll system) are eligible PCard users. To obtain a p card, please provide the completed credit card application to the Finance & Administration Department. Once the form is submitted, the PCard Department will be in contact with the employee to provide instructions to move forward. For more details, please see [BPHB-Purchasing](#).

Access and restrictions

- Access to systems within our School is available to the following individuals: Administrators, Faculty, Researchers and Staff as defined by business need.
- Student employees should only have access to view their personal/academic information through the use of the Applicant/Student links and are restricted from using any other system within the School of Public Health.