

Introduction to WebGUI Training Presentation

<http://www.bu.edu/tech/support/buworks/>

<http://www.bu.edu/tech/support/buworks/help/finance/>

<http://www.bu.edu/tech/support/buworks/newsletters/>

BUworks Recommended Trainings

Training Path Based on BUworks Business Roles

Key

R Training is strongly recommended

O Training is optional

Based on your BUworks business role(s), use the grid below to determine which instructor-led training sessions are recommended for you and which are optional

[Click here to view a description of the functional capabilities associated with the roles below](#)

Functional Area	Workshop (click to view course description and/or to register)	Finance Roles							Shopping / Approving Roles		Human Capital Management Roles		
		Approver ¹	Submitter ¹	Submitter (Display only)	Journal Voucher Upload	Internal Service Requester	Internal Service Provider	Department Grant Administrator	Shopper	Approver	Manager	Payroll Coordinator	Time Keeper
Finance	WebGUI	R	R	R		R	R	R			O	O	
	Journal Entry	R	R										
	Journal Voucher Upload				R								
	Journal Entry Workflow	R	R	R		R	R	R					
	PO Invoice Workflow	R	R	R				O	R	R			
	ISR Requester	R	R	O		R	R	O					
	ISR Provider Fulfillment						R						
	Funds Reservation	R	O	O		R	R	R			O		
BW Reporting (Intro-level)	Account XWalk²	O	O	O	O	O	O	O					
	Funds Management Reporting	R	R	R		R	R	O	O	O	O		
	Grants Management Reporting for Administrators							R					
	Supplier Relationship Management Reporting	O	O	O		O	O	O	R	R	O		
	Payroll Reporting							O			O	R	
Sourcing & Procurement	Shopping Cart Creation (Basic)	O	O						R	O			
	Shopping Cart Creation (Intermediate)								O	O			
	Procurement Approval	O	O						O	R			
Human Capital Management	HCM/IAM Overview										R	R	
	HCM Intermediate (OM & PA forms)										R	R	
	Hiring Employees										R	R	O
	Nakisa/PPOSE Org. Chart										O	O	

Acronyms
 ISR = Internal Service Request
 FM = Funds Management
 GM = Grants Management
 IAM = Identity & Access Management
 OM = Organization Management
 PA = Personnel Administration
 SRM = Supplier Resource Management
 XWALK = Finance Account Crosswalk

Notes:

- We recommend that those with finance submitter and approval roles take the available training sessions in the following order:
 - Introduction to WebGUI
 - Internal Service Request
 - Journal Entry
 - Journal Entry Workflow
 - PO Invoice Workflow
 - Funds Reservation
- We recommend that those who handle Check Deposit through the Cashiers office, Student Employment, Student Payroll, or Financial Aid take the Account XWalk training.

Resources for New Employees

We recommend these steps for any new employee who will be working with BUworks:

- **Identify business roles required**
- Work with your manager and your Data Security Administrator (DSA) to determine what process areas you will be working with and to ensure you have all of the BUworks business roles, transaction access, and data permissions necessary to perform your job.
- **Review Process Guides to help your foundational understanding of BUworks**
- When you have determined the various process areas you will be working with, review the available [Process Guides](#). The Guides are a great way to explore BU administrative processes and associated BUworks tools. Videos are available to help you get started with Employee and Manager Self-Service, navigating BUworks, and using worklists. Beyond these basics, additional videos and tutorials are available to provide help with process areas including Time Management, Human Resources, Finance, Ordering Goods and Services, and Business Warehouse Reporting.
- **Supplement your foundational knowledge by attending hands-on training**
- After you have explored the Process Guides, you should plan to attend any of the instructor-led workshops that are appropriate to the roles you and your manager have identified for you. Examine the [Training Path Grid](#) to determine which workshops will help you perform your job. Visit the [Training Schedule page](#) for workshop specifics and to register to attend. Available detail includes workshop content, target populations, and dates, times, and locations for each workshop.
- **Use available documentation**
- The Document Library contains a broad selection of information that includes step-by-step instructions to perform tasks in each of the BUworks functional areas – [Finance](#), [Human Capital Management](#), [Supplier Relationship Management](#) – as well as [Business Warehouse reporting](#).
- **Leverage the experience of local experts: your colleagues**
- One of the most effective ways to learn new business processes is for you to partner with coworkers and seasoned employees who have a deep understanding of your unit's role and systems.

BUworks Recommended Finance Trainings

Highlighted in yellow below are the suggested Finance training sessions. View training workshop information and register to attend here: <http://www.bu.edu/tech/about/training/classroom/buworks/>

Notes:

1. We recommend that those with finance submitter and approval roles take the available training sessions in the following order:

1. Introduction to WebGUI
2. Internal Service Request
3. Journal Entry
4. Journal Entry Workflow
5. PO Invoice Workflow
6. Funds Reservation

2. We recommend that those who handle Check Deposit through the Cashiers office, Student Employment, Student Payroll, or Financial Aid take the Account XWalk training.

The SAP Finance Training topics listed above provide a guide to which Finance training courses to register to. Note, they don't have to be taken in any particular order except for Intro to WebGUI and Journal Entry Workflow training lab.

Introduction to WebGUI is recommended for those individual with no SAP Finance WebGUI experience. Journal Entry training should be taken before taking the Journal Entry Workflow training.

Course Map

WebGUI –
Finance

Lesson 1: Course Introduction

Lesson 2: BUworks Central portal

Lesson 3: WebGUI ECC ERP System

Lesson 4: BUworks Help & Support

Lesson 5: Summary

Course Objectives



From this training lab session, you can expect to learn:

- What is BUworks?
 - How to navigate within BUworks Central portal?
 - How to navigate within WebGUI ECC ERP System?
 - Where and how to access and use BUworks reference material and support.
-

What is BUworks

Official Name

- Is Boston University's implementation of SAP.
 - System, **A**pplication & Products in Data **P**rocessing
 - System, **A**nwendungen, **P**roduckte in der Datenverarbeitung - German system
-

What is BUworks

- BUworks is an integrated Enterprise Resource Planning (ERP) system designed to provide administrators and faculty with more efficient financial management, human capital management, and procurement capabilities. SAP ERP platform was implemented in 2011.
 - It replaces many of the independent systems formerly in use—parts of Galaxy/Walker, parts of Employee Link and Business Link, and all of the online turnarounds, online requisitions, etc.—with one efficient.
-

Course Overview

Intro to WebGUI – Finance

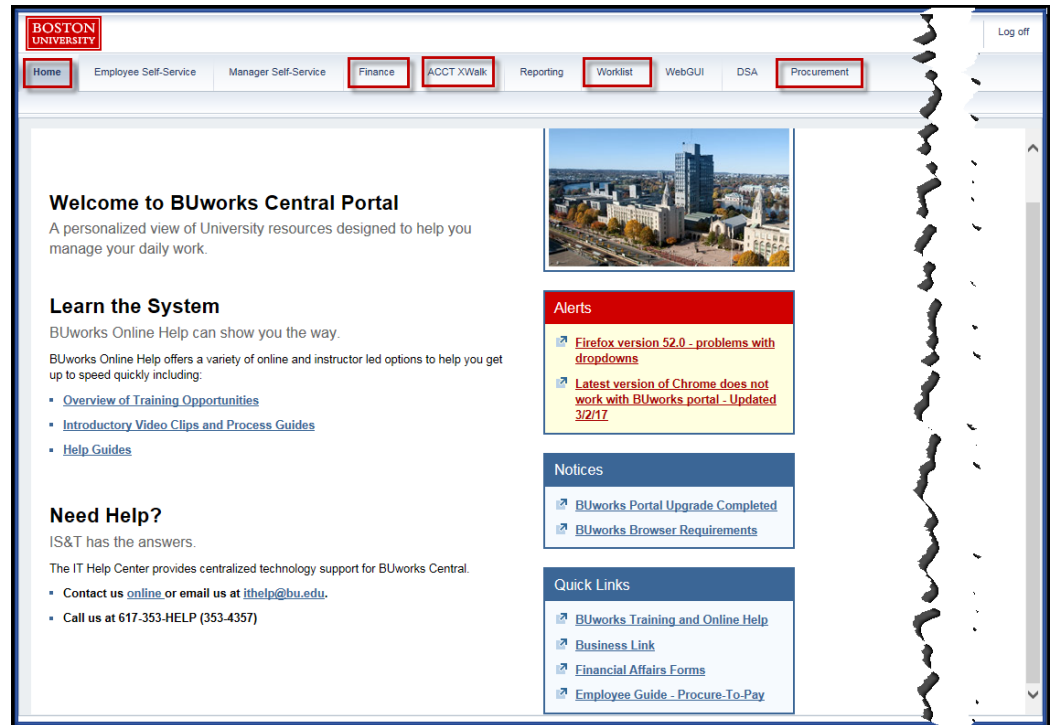
■ BUworks Central Portal Access

- Home tab
- Finance tab
 - ISR Provider Fulfillment
 - Accounts Receivable Customer Accounts
- Acct XWalk (Account Crosswalk)
- Worklist
- Procurement
 - Internal Service Request

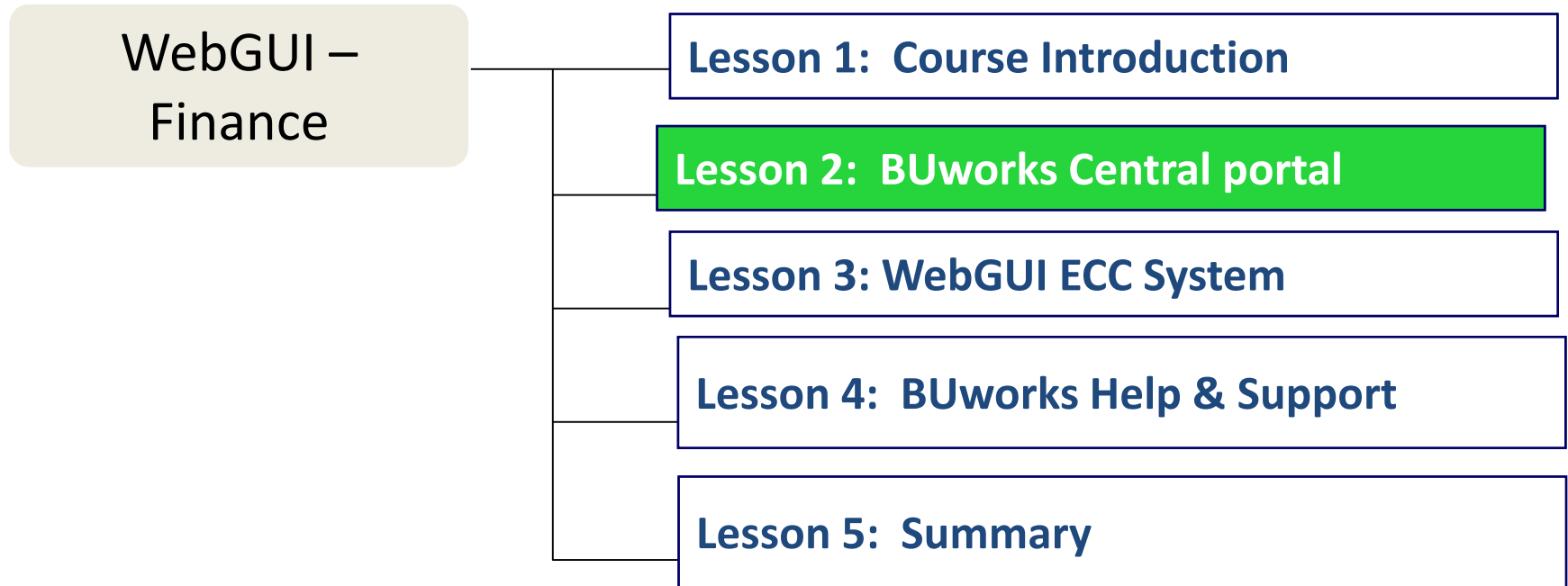
■ WebGUI ECC System

- SAP Easy Access /User Menu
- User Authorization
- Navigation of Menu
- Finance Roles
 - FB03 –Display FI document
 - FMRP_RFFMEP1AX –Posting report
- Creating Favorites
- Creating Multiple Sessions
- Creating Personal Variant
- Proper Logon & Logoff WebGUI ECC System

■ Q&A



Course Map



Lesson 2 – BUworks Central Portal

- Upon completion of this lesson, you should be able to:
 - Identify access and what is available on the BUworks Central portal
 - Access and use the ACCT XWalk (Account Crosswalk) tool
 - Access and manage the Worklist tab
 - Identify access and availability of WebGUI ECC system
 - Access training and help through portal



BUworks Central

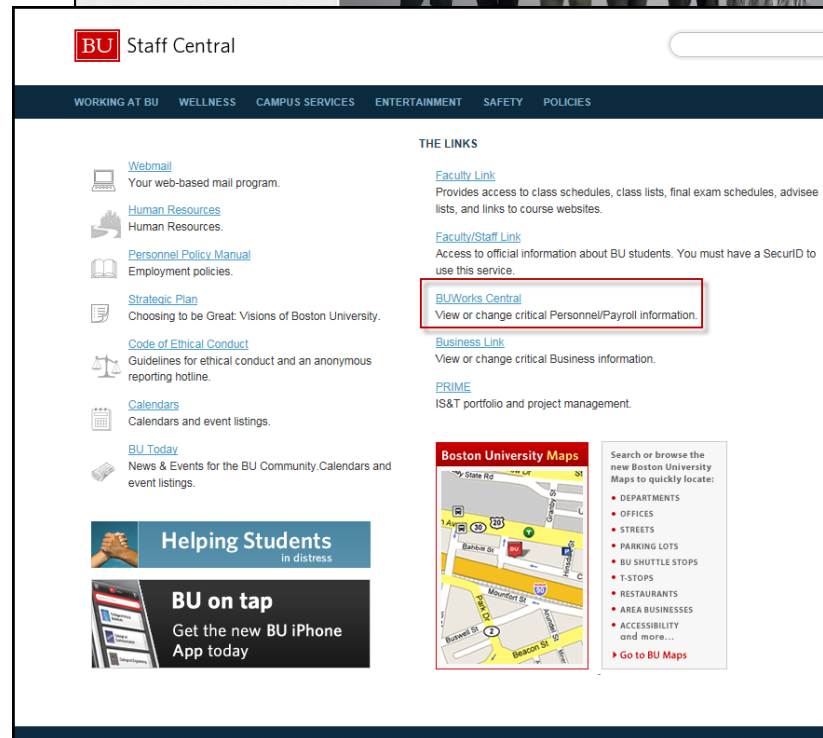
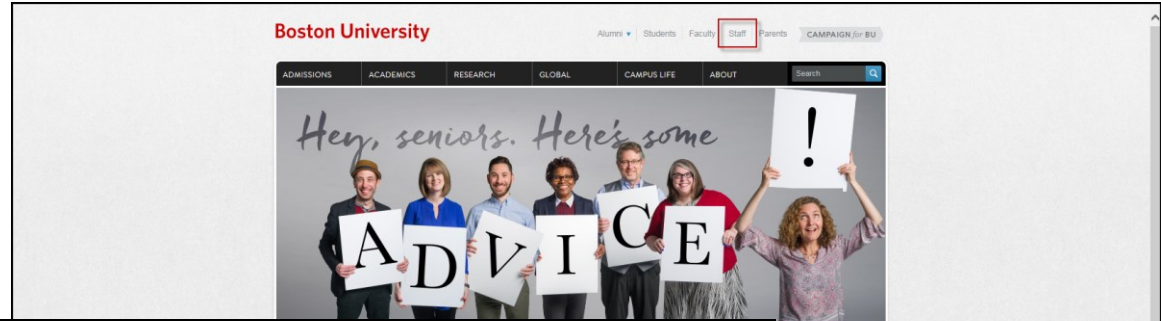
What is BUworks Central portal

- It is a system built on SAP platform that provides integrated business and administrative tools and processes.
 - BUworks was developed to support users in achieving their goals as a leading research university.
 - The portal provides a user with a single sign-on to the SAP system(s) required for users to be able to perform their job duties and responsibility.
-

How do you access BUworks Central portal

Here are two ways to access BUworks Central portal.

1. Go to BUworks webpage www.bu.edu/buworks/ and click on the “Launch” button
2. Go to www.bu.edu, click on “Staff” and click on [BUworks Central](#)

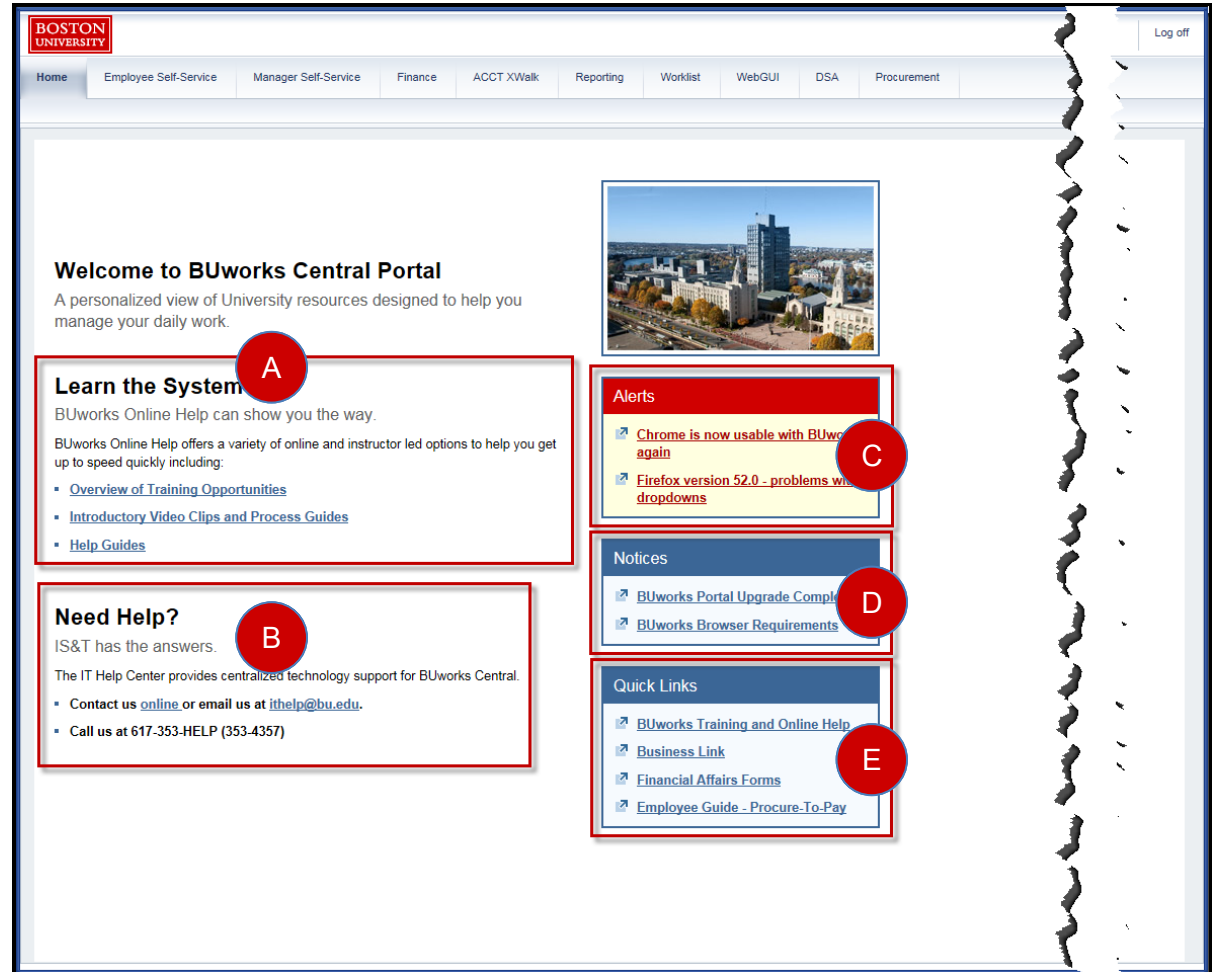


Homepage of BUworks Central

BUworks Central

Homepage provides:

- A. Training Resources
- B. IS&T Help Center Info
- C. System Alerts
- D. System Notification
- E. Access to Quick links
 - Financial Affairs forms
 - Vice Presidents Offices →
 - Comptrollers →
 - General Accounting
 - Accounts Payable
 - Travel Services etc.



BUworks Central Portal

Some of the available Tabs and Sub-tabs

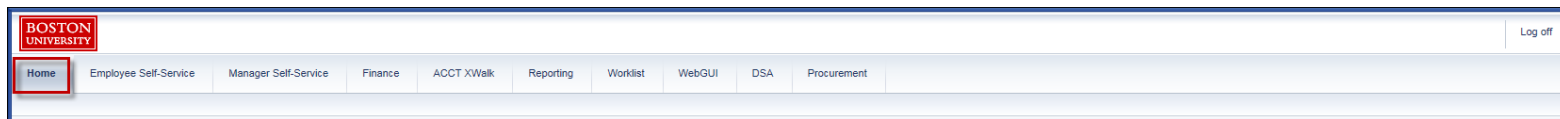
High-Level Overview of Tabs

Tab	Description
Employee Self Service	Provides easy access to information and services for employees.
Manager Self Service	Provides access to human resource functions related to areas and staff for which a person is responsible.
Finance	Provides access to Finance portal functions. Most are restricted to Central users and ISR Providers. The only distributed function is Asset Relocation.
ACCTX Walk	Provides a translator to convert account information from legacy ACK to SAP and from SAP to legacy ACK.
Reporting	Provides access to Business Warehouse (BW) reports for each of the BUworks functional areas which includes: Finance, Human Capital Management (HR), and Supplier Relationship Management (purchasing).
Procurement	Provides access to procurement functions.
Worklist	Shows Tasks, Alerts, Notifications, and Tracking for workflow items have been sent to a person.
WebGUI	Provides direct access to SAP ECC.

BUworks Central Portal

Two areas available to all Boston University Employees

- Home
- Employee Self-Service

A screenshot of the BUworks Central Portal Home page. The Boston University logo is in the top left. A "Log off" link is in the top right. The navigation bar is the same as in the previous screenshot. The main content area includes:

- Welcome to BUworks Central Portal**: A personalized view of University resources designed to help you manage your daily work.
- Learn the System**: BUworks Online Help can show you the way. BUworks Online Help offers a variety of online and instructor led options to help you get up to speed quickly including:
 - [Overview of Training Opportunities](#)
 - [Introductory Video Clips and Process Guides](#)
 - [Help Guides](#)
- Need Help?**: IS&T has the answers. The IT Help Center provides centralized technology support for BUworks Central.
 - Contact us [online](#) or email us at ithelp@bu.edu.
 - Call us at 617-353-HELP (353-4357)
- Alerts**:
 - [Chrome is now usable with BUworks again](#)
 - [Firefox version 52.0 - problems with dropdowns](#)
- Notices**:
 - [BUworks Portal Upgrade Completed](#)
 - [BUworks Browser Requirements](#)
- Quick Links**:
 - [BUworks Training and Online Help](#)
 - [Business Link](#)
 - [Financial Affairs Forms](#)

A photograph of the Boston University campus is shown on the right side of the page.A screenshot of the BUworks Central Portal Employee Self-Service page. The Boston University logo is in the top left. A "Log off" link is in the top right. The navigation bar is the same as in the previous screenshot, with "Employee Self-Service" highlighted with a red box. The main content area includes:

- Overview**:
 - **Employee Services**
 - **Time Services**: Review your time balances and plan your time off. Weekly employees can record working time. Quick Links: Time Off Request.
 - **Benefits and Pay**: Display the plans in which you are currently enrolled and enroll in new benefit plans. Display your salary statement and your direct deposit information. Quick Links: BU Total Rewards Portal, Salary Statement, W-2 Election, W-2 Display.
 - **Personal Information**: Manage your addresses, emergency contact, personal data, information about family members and dependents and your race and ethnicity data.
 - **Work Environment**: Display the University property assigned to you.
 - **Travel and Expense Reimbursements**: Review the University's Travel Policy, apply for a Travel Credit Card, Travel and Expense Reimbursements via Concur.
 - **Campus Services**: Access non-BUworks self-service functions, such as enrollment for FERPs, Permits and Terrier Convenience Plan.

A red error message "There is a problem with this resource" is visible on the right side of the page.

BUworks Central Portal Finance Tab

BOSTON UNIVERSITY

Home Employee Self-Service Manager Self-Service **Finance** ACCT XWalk Reporting Worklist WebGUI DSA Procurement

Distributed Forms **ISR Fulfillment** ISR Provider Master Data

• Asset Relocation
• **Customer Master Data**

BOSTON UNIVERSITY
Post Award Financial Operations
Property Management
25 Buick St., Rm. 235
Boston, MA 02215

Instructions: Fill out the form below on-line. Upon completion, click the **Print and Email** button located at the bottom of the form to electronically submit a copy to the Property Accountant for review and processing. Please also print a copy for your records.

MOVEABLE CAPITAL EQUIPMENT FORM FOR ASSET RETIREMENT / TRANSFER / GIFT

After entering Tag number, please press enter to populate other fields.

Status	Tag Number if Assigned	Action Date	Description	Manufacturer	Model Number	Serial Number	Address	Room	Amount Received (if sold)
▼									0.00
▼									0.00
▼									0.00
▼									0.00
▼									0.00
▼									0.00
▼									0.00
▼									0.00
▼									0.00
▼									0.00
▼									0.00

Comments:

Responsible First Name: * Last Name: *
Tel. Ex: * Date: 04/24/2017

Cost Center / Internal Order Number (Owner): * Cost Center / Internal Order Name (Owner):
Responsible Cost Center Number: * Responsible Cost Center Name:

Finance Tab

- ISR Fulfillment
- ISR Provider
- Master Data
- Asset Relocation
- Customer Master Data

Account XWalk Tab

The **ACCT XWalk (Account Crosswalk)** is used to translate **SAP** and/or **Legacy (Walker)** accounts.

- **Translate SAP to Legacy (Walker)**
 - SAP Cost Objects (consist of Cost Center, Internal Order, WBS Element)
 - SAP GL Account (General Ledger account)
- **Translate Legacy (Walker) to SAP**
 - Fund, Unit, Department, and Source Code
 - Accounting Codes

The screenshot displays the BUworks Online Help interface for the ACCT XWalk tab. The top navigation bar includes the Boston University logo and tabs for Home, Employee Self-Service, Manager Self-Service, Finance, ACCT XWalk, and Reporting. Below the navigation bar, there are two sub-tabs: Legacy ACK to SAP and SAP to Legacy ACK. The main content area is titled 'Walker to SAP Translation' and contains a 'Walker Account Info' section. This section has input fields for Fund, Unit, Dept, Object, and Source, and an Inactive Indicator checkbox. A 'Clear' button is located below the input fields.

Additional Information can be found on the [BUworks Online Help](#) website.

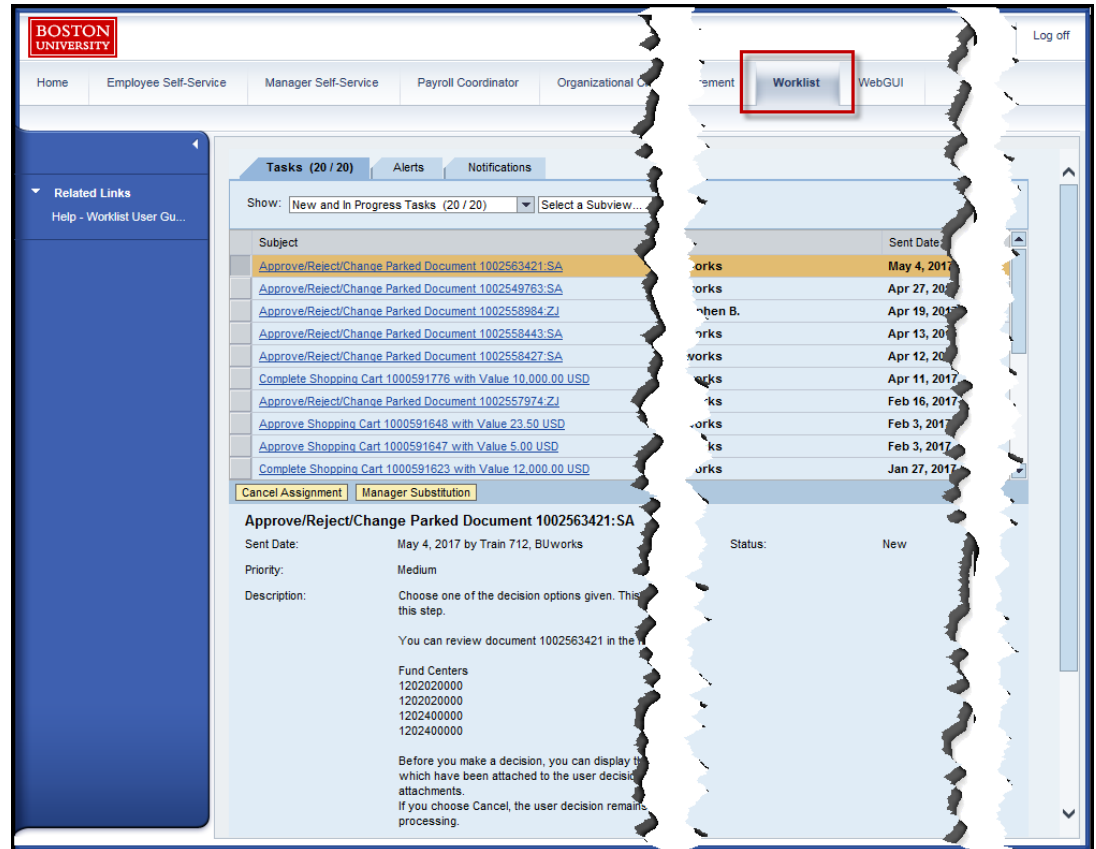
Worklist Tab

SAP Worklist is where assignment of Financial:

- Tasks
- Alerts
- Notifications
- Workflows information such as tracking on Finance related:
 - Journal Entry Approval
 - PO Invoice Approval

Note: this lab is specific to **SAP** Finance area.

Other **SAP HCM** related tasks, alerts, notification and workflow will also appear on the assigned Worklist tab.



Course Map

WebGUI –
Finance

Lesson 1: Course Introduction

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Lesson 3: WebGUI ECC System

Lesson 4: BUworks Help & Support

Lesson 5: Summary

WebGUI Tab

What is WebGUI ECC System

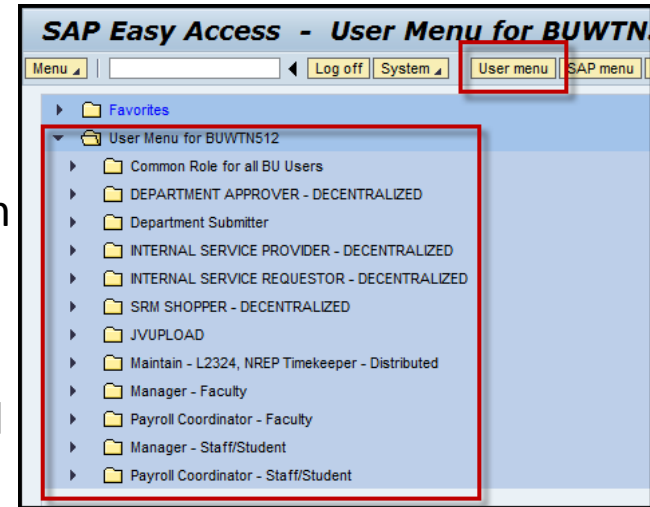
- The SAP Finance and Human Resource/Payroll transactional system where information is entered, changed and data is gathered.
- General Ledger for Boston University resides here.
- SAP Finance transactions codes.
- Transactions are created and displayed in real time.



SAP Easy Access

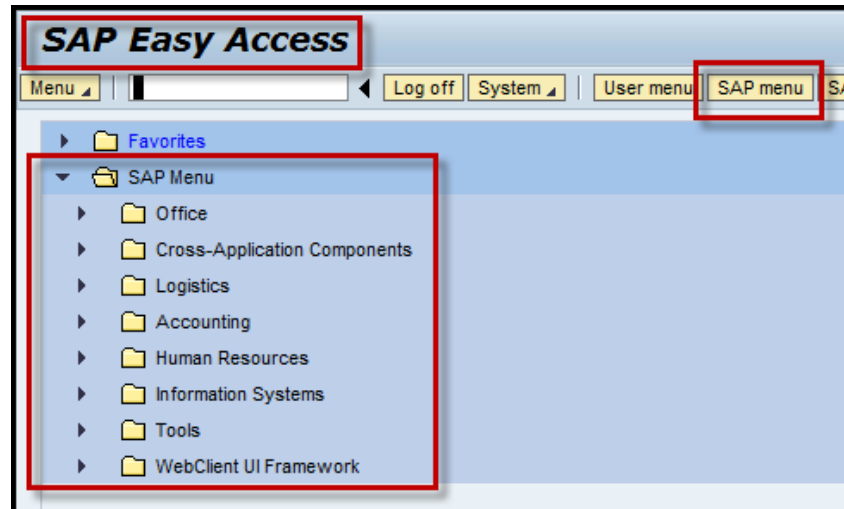
SAP Easy Access

- Is a window based system which allows navigation of the **SAP** buttons, toolbars and windows. The system defaults to the **SAP** Menu which displays all modules Within the **SAP** system.
- It is similar in functionality to Microsoft Word and Excel in Windows. Functionality such as select (**Ctrl A**), copy (**Ctrl C**), and paste (**Ctrl V**).



User Menu and Authorization

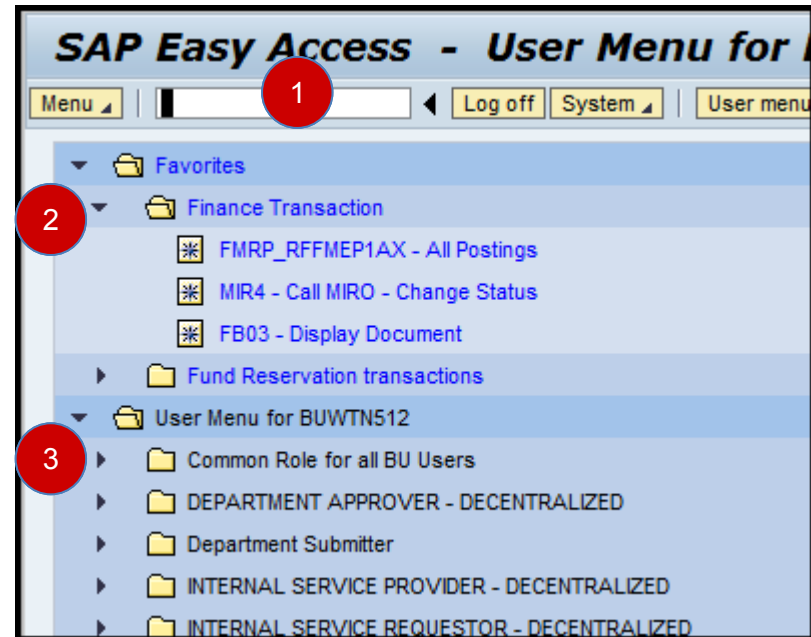
- SAP transactions are specific to authorizes access.
- Job roles and responsibilities determine user access and authorization.



WebGUI – SAP Easy Access

There are three ways to access transactions in ECC Systems

1. Using the command field – enter transaction code
2. Favorite folders – created folder where commonly used transaction are placed for easy access.
3. Access the User Menu and assigned roles



WebGUI – SAP Easy Access

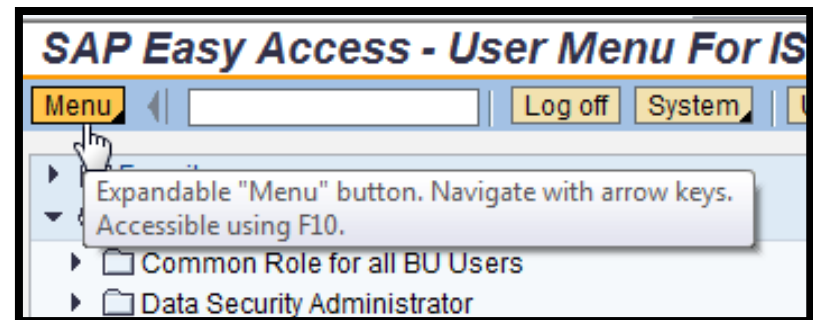
Key Icons

- Are identify by placing cursor over icon and hovering over it.
 - A balloon will display providing the icon name and associated function key

System Messages

- *System messages will display at the bottom left of the screen, messages such as:*

- Document number
- Error messages
 - *Errors must be corrected to proceed.*
- Warning messages
 - *Warning can be bypassed by hitting the enter key*



System Message colors

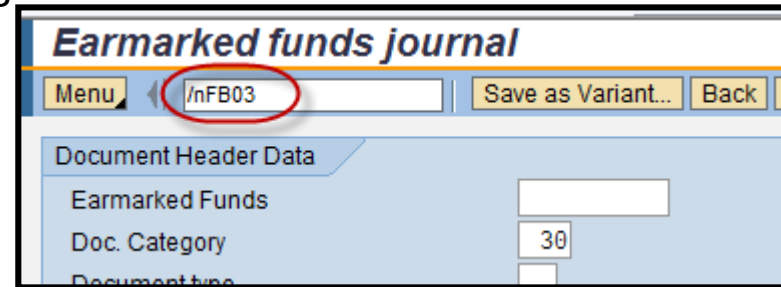
- **Red** – Error message – indicates a problem and must be correct before continuing
- **Green** – Information message no action is required. System is informing you of a condition or fact. You must hit the Enter key to bypass
- **Yellow** – Warning messages indicates that there may be a problem with the data you have entered. You may have to correct or review data before continuing.

WebGUI – SAP Easy Access

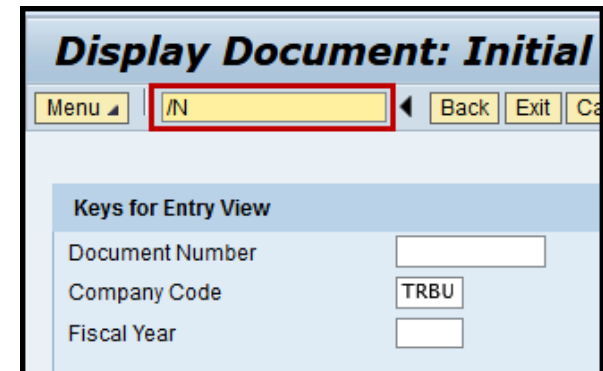
Tips and Tricks

- **/NFB03** (SAP Transaction number) – Navigate from one transactions to another

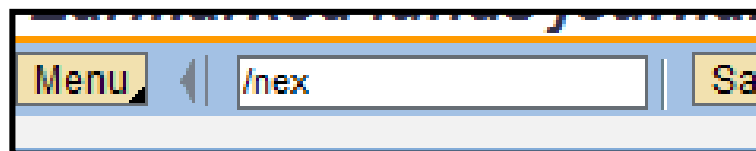
Example: Need to navigate to **FB03** without having to use the **Back** button



- **/N** – Exit transaction and return to SAP User Menu



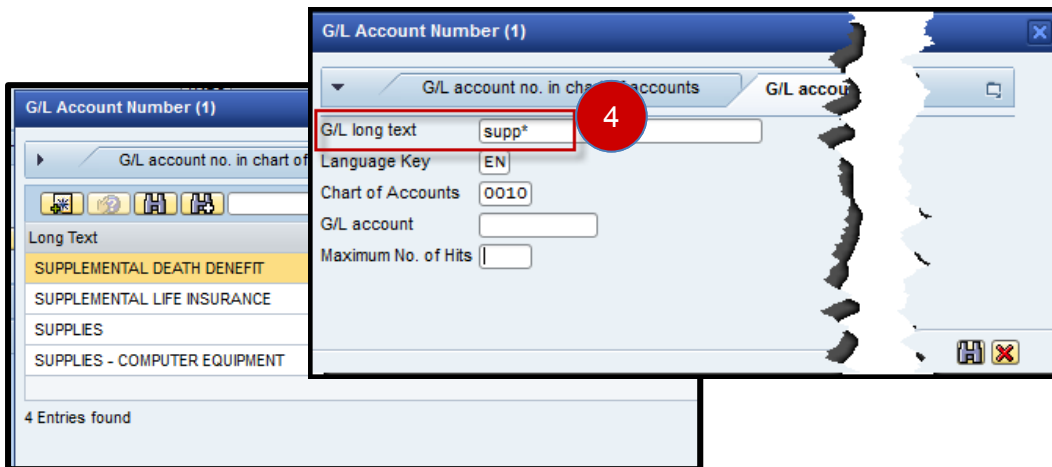
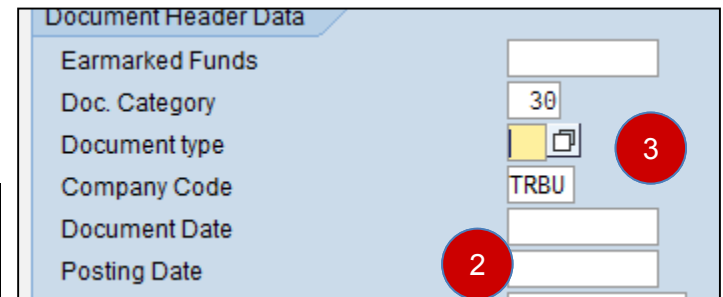
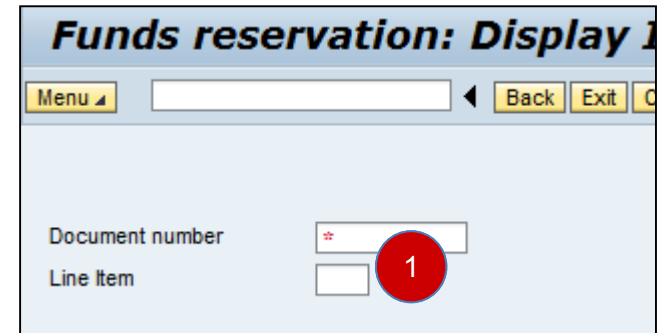
- **/NEX** - Exit/Log off WebGUI ECC System



WebGUI – SAP Easy Access

Types of Fields

1. Mandatory fields have a red asterisk
2. Optional fields are blank
3. Field with Mathcodes (drop down icon) allow for search
4. Wildcards (*) allows for searches using part of the name (for example when looking for the GL account for “supplies” enter supp*)



SAP Smart Tools

These options are available when accessing transactions codes

- **Services for Object Icon – FI documents**

- Create Attachments
- Create note
- Attachment list

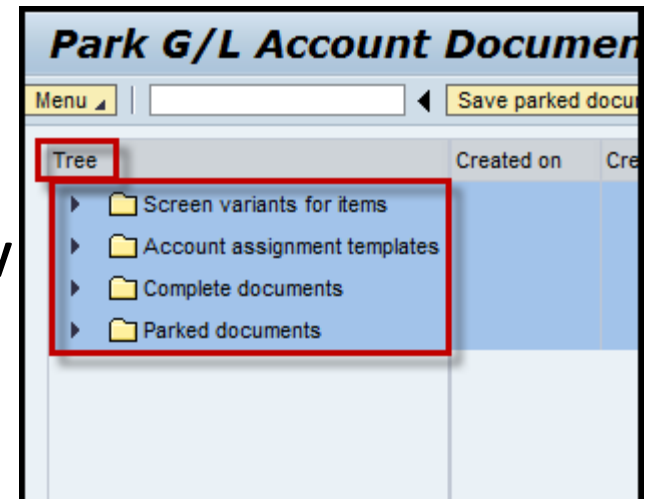


- **Tree on/Tree off/Refresh Tree – Journal Entry**

- Access Parked Journal Entries
- Access assigned Complete Journal Entries

- **Account Assignment Template – Journal Entry**

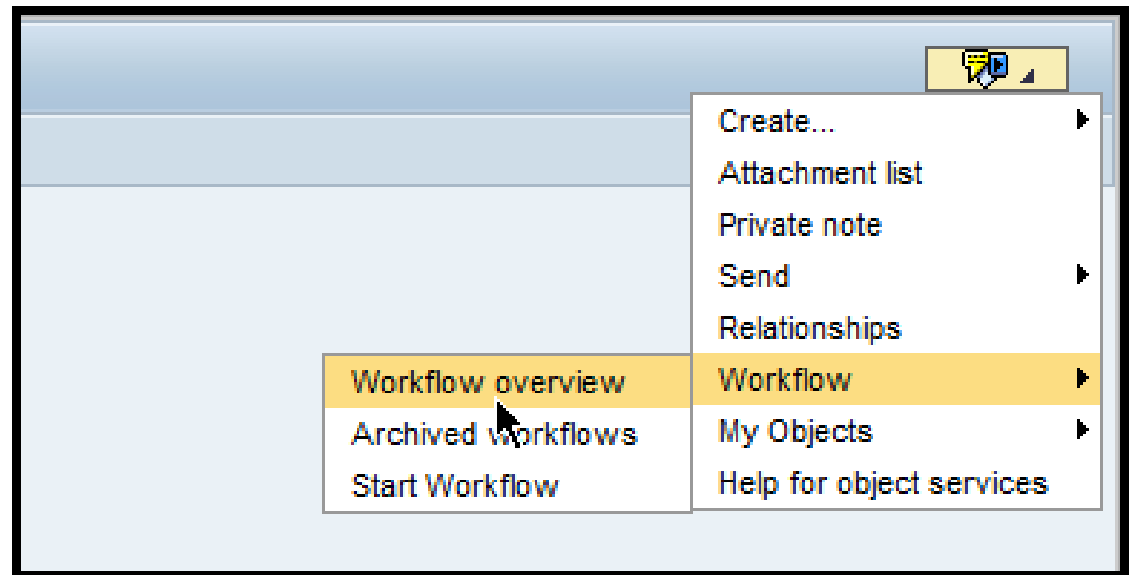
- Create Account Assignment template
- Delete Account Assignment template



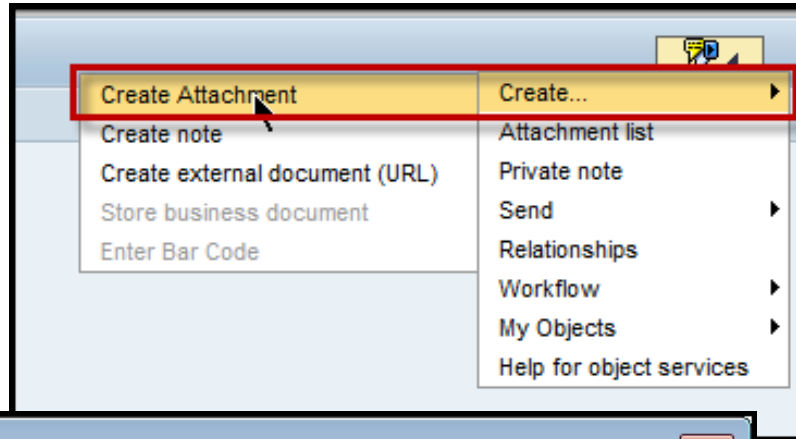
Services for Objects Icon

Selecting the **Services for Object** Icon will display a drop down list of additional features

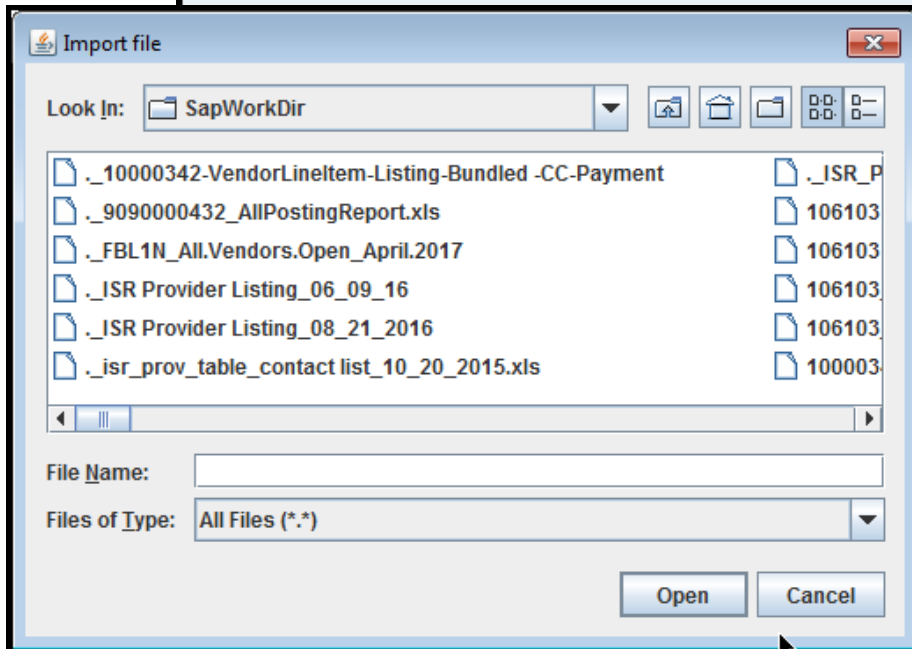
- The features most commonly used are:
 - Create an Attachment or Note
 - Display Attachment List
 - Workflow overview

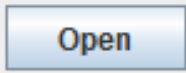


Create an Attachment

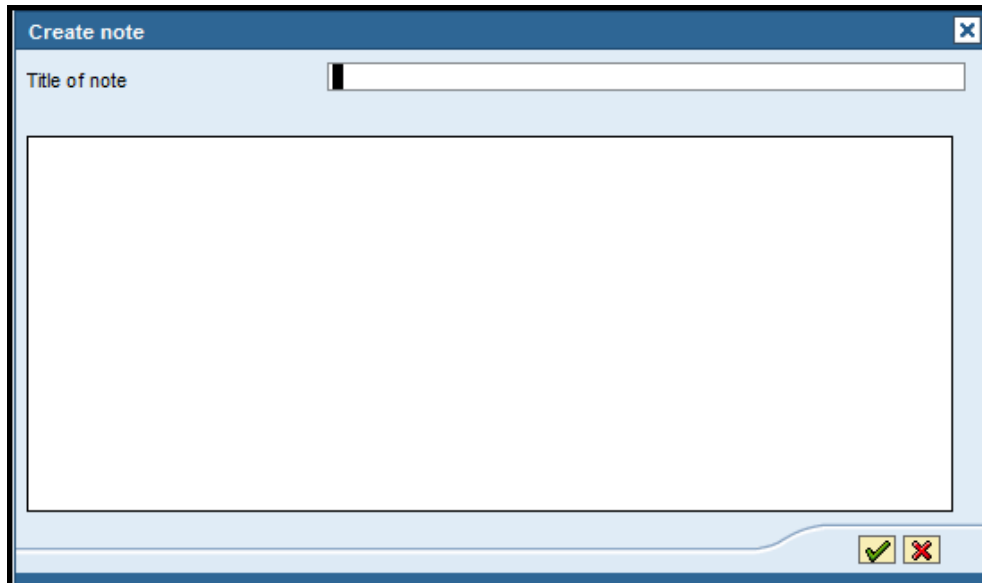
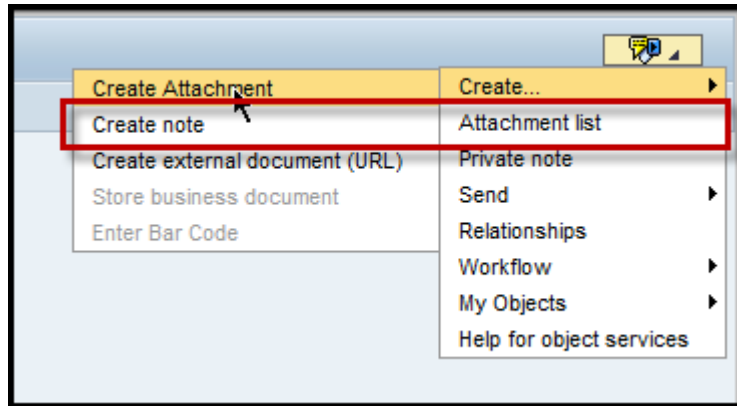



- Using the **Create** option from the dropdown menu you are able to add an attachment to the journal entry



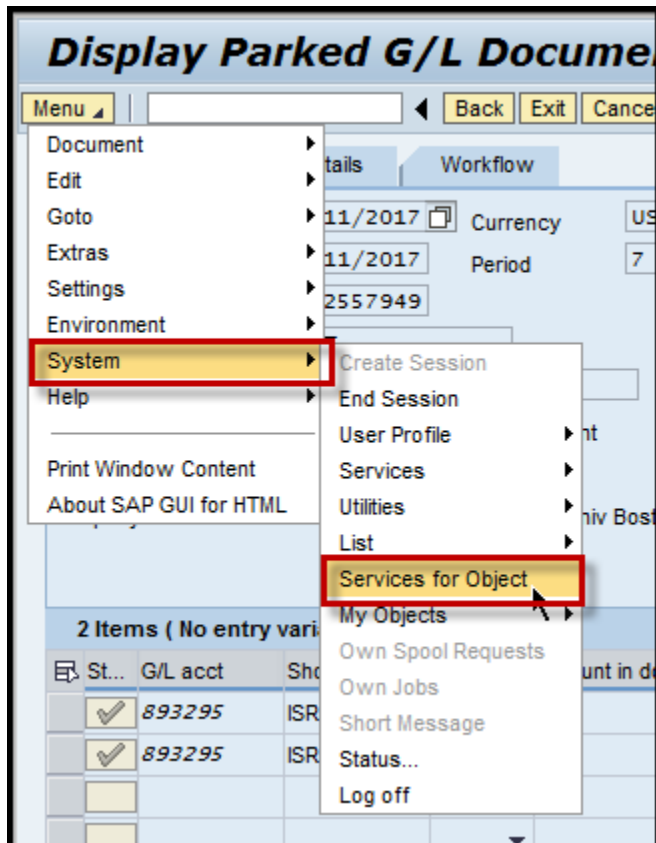
- Once the Import window opens, you can go to the location where the file you want to attach is saved and select it by double clicking it or using the  button


Create a Note

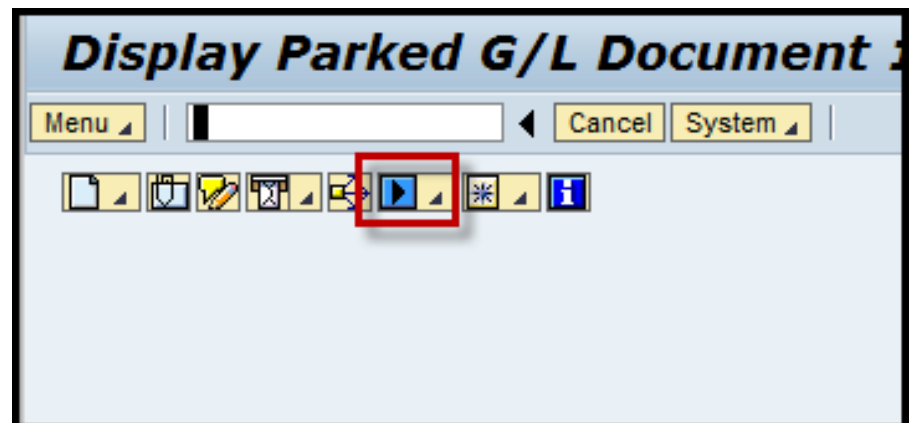


- Using the **Create** option from the dropdown menu you are also able to create a note to the journal entry
- Once the Create note window opens, enter a title in the subject line and then the note in the free text field
- Click  to save the note

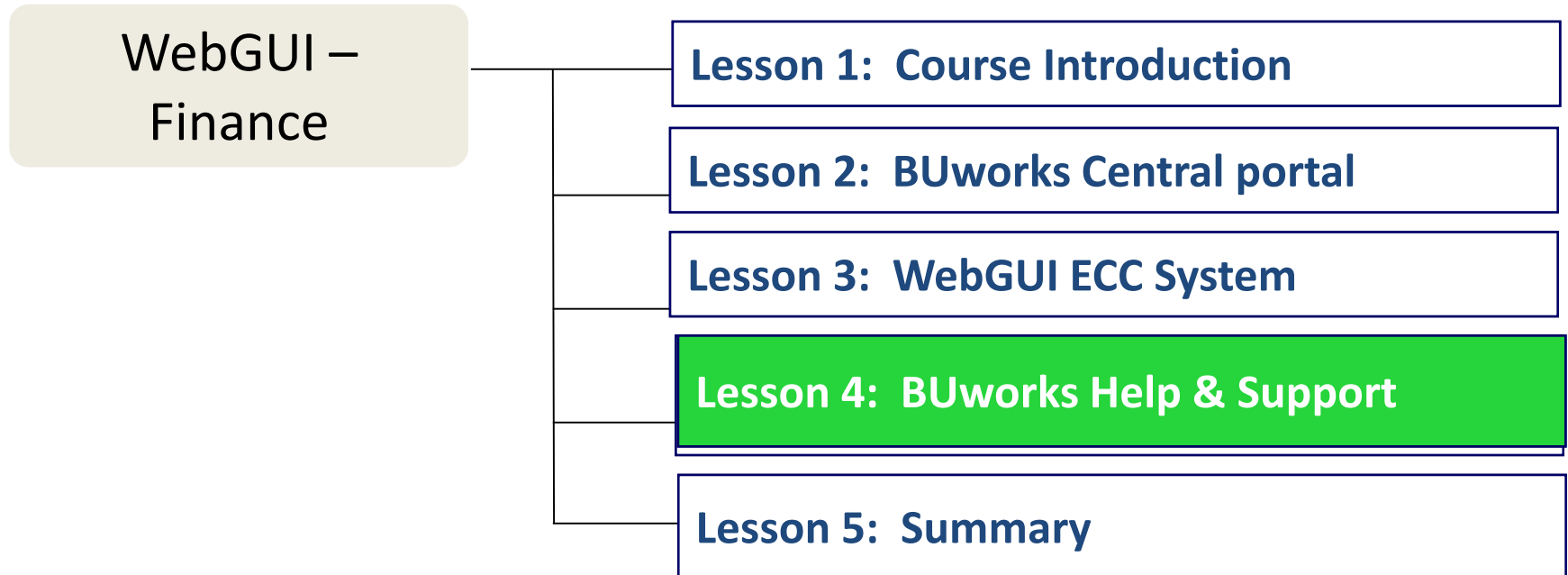
Services for Objects via the Menu Button



- Accessing **Services for Object** via the Menu button will open a window with the icons instead of the list you see when you use the icon
- To display the workflow select  > Workflow Overview



Course Map



Obtaining Help



Online Help

Support information and documentation for common BUworks/SAP transactions are available and include:

- **Process Guides** – Simple process flows show the sequence of transactions and give context to the detailed work instructions.
- **Work Instructions** – Step-by-step instructions which include detailed descriptions, examples, short cuts, best practices, and screen shots for processing transactions in BUworks.
- **Quick Reference Guides** – Concise 1-4 page documents providing summary instructions for performing a particular task.

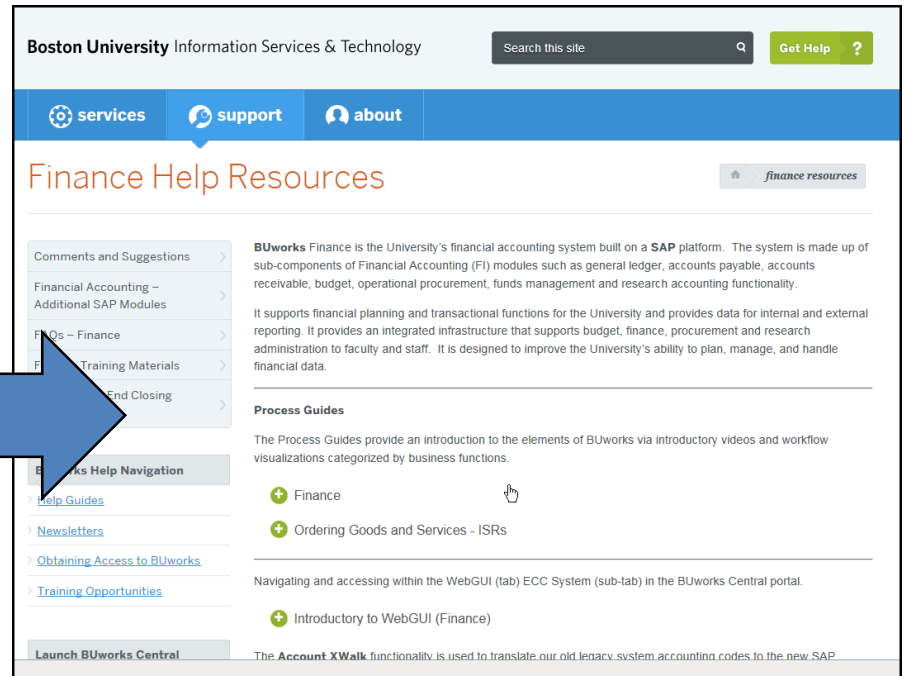
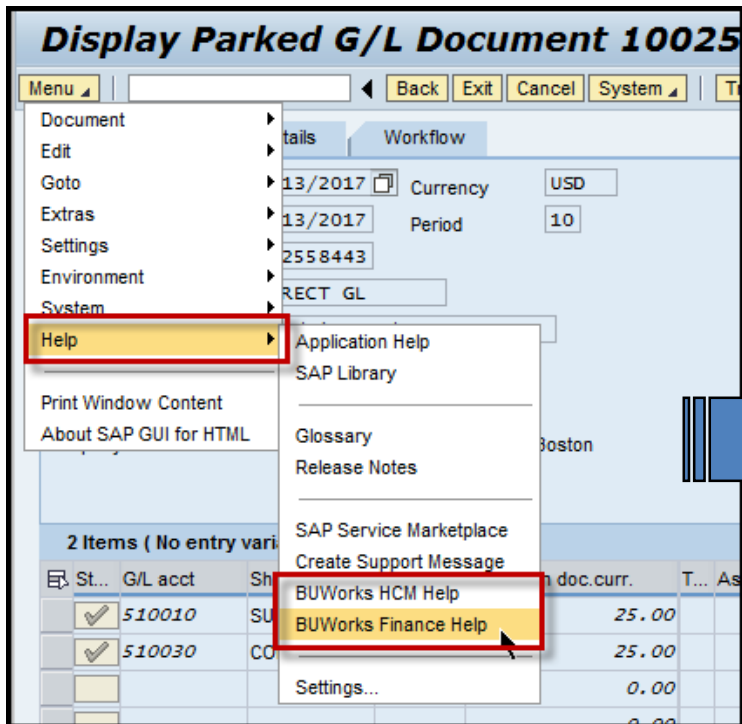
BUworks Online Help website is <http://www.bu.edu/tech/support/buworks>

Note: While support documents can be printed or saved locally, it is recommended that users refer to help documentation online. This ensures that the information being referenced is current.

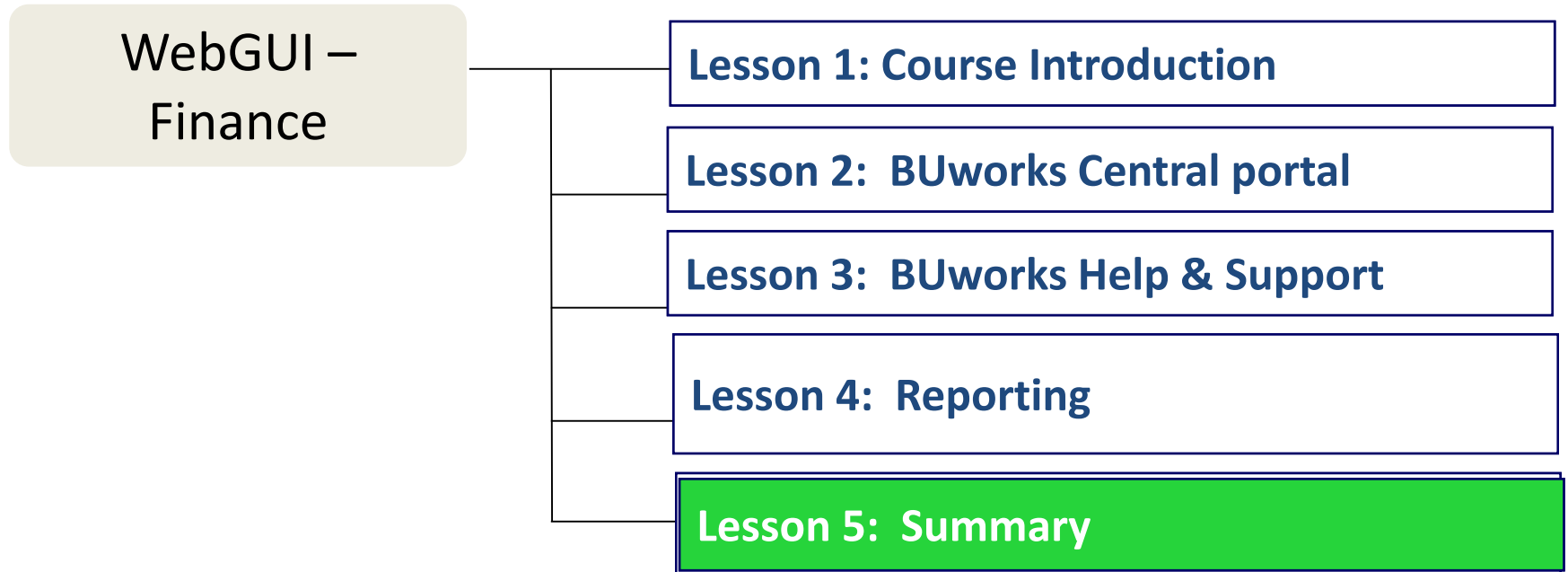
BU (WebGUI) Custom SAP Help

1. From within the User Menu or transaction, click the **Menu** button, select **Help**, **BUworks Finance Help**.

2. The **BUworks Finance Help Resource** window opens to provide you with Work Instructions and Quick Reference Guides on Finance documents.



Course Map



Course Summary

You should know be able to:

- Navigate and Identify BUworks Central portal tabs
- Access the Account Crosswalk
- Access the Worklist
- Navigate and Identify WebGUI tab, easy access menu, user menu and roles assigned
- Identify assigned finance roles
- Access transactions
- Access help and resources



Thanks for Attending the WebGUI Finance Training

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