# 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

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

Key

| | |
|---|---|
| R | Training is strongly recommended |
| O | Training is optional |

| | | Finance Roles | | | | | | | Shopping / Approving Roles | | Human Capital Management Roles | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Functional Area | Workshop (click to view course description and/or to register) | 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 | | |
| | Account XWalk[2] | O | O | O | O | O | O | O | | | | | |
| BW Reporting (Intro-level) | 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:
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 Employement, 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:
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    1. Introduction to WebGUI
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    3. Journal Entry
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    5. PO Invoice Workflow
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2. We recommend that those who handle Check Deposit through the Cashiers office, Student Employement, 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.
  - **S**ystem, **A**pplication & Products in Data **P**rocessing
  - **S**ystem, **A**nwendungen, **P**roduckte in der Datenverarbeitung - German system

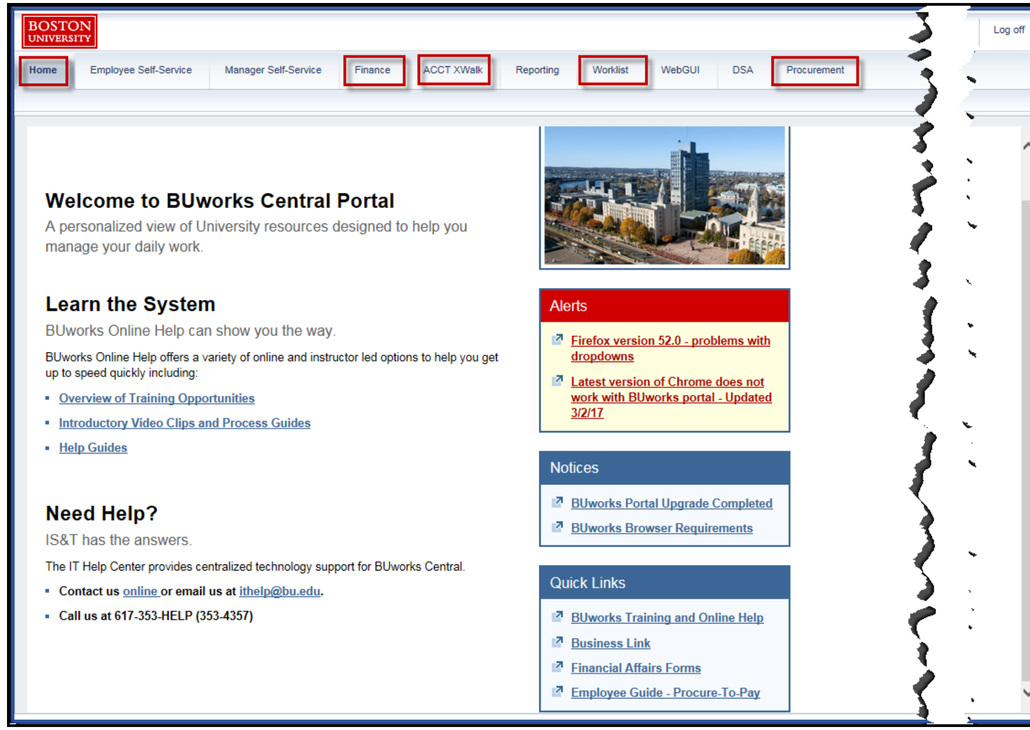
# What is BUworks

- 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**



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# Lesson 2 – BUworks Central Portal

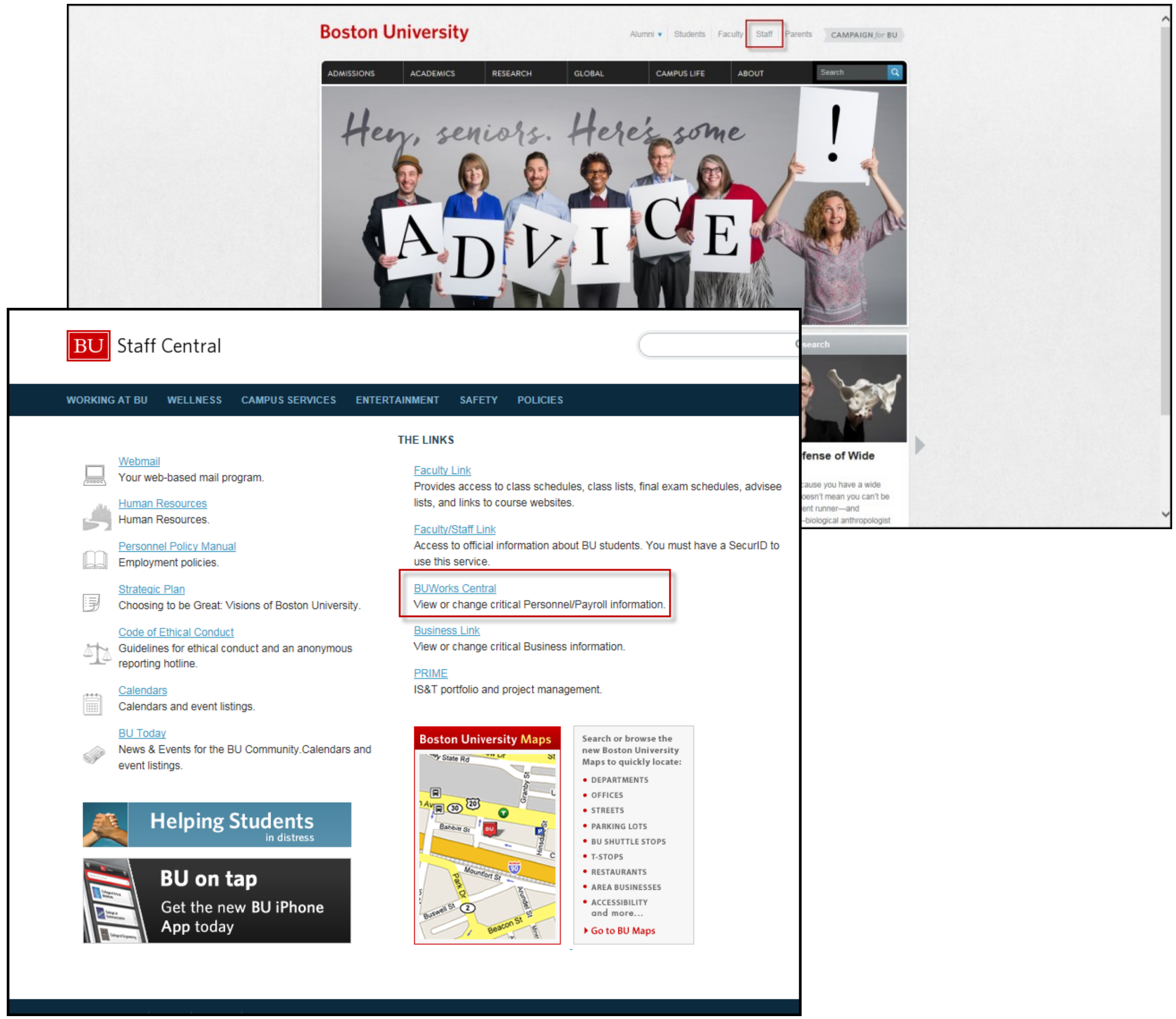
- Upon completion of this lesson, you should be able to:
  - Identify access and what is available on the BUworks Central portal
  - Access and use the ACCT XWalk (Account Crosswalk) tool
  - Access and manage the Worklist tab
  - Identify access and availability of WebGUI ECC system
  - Access training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



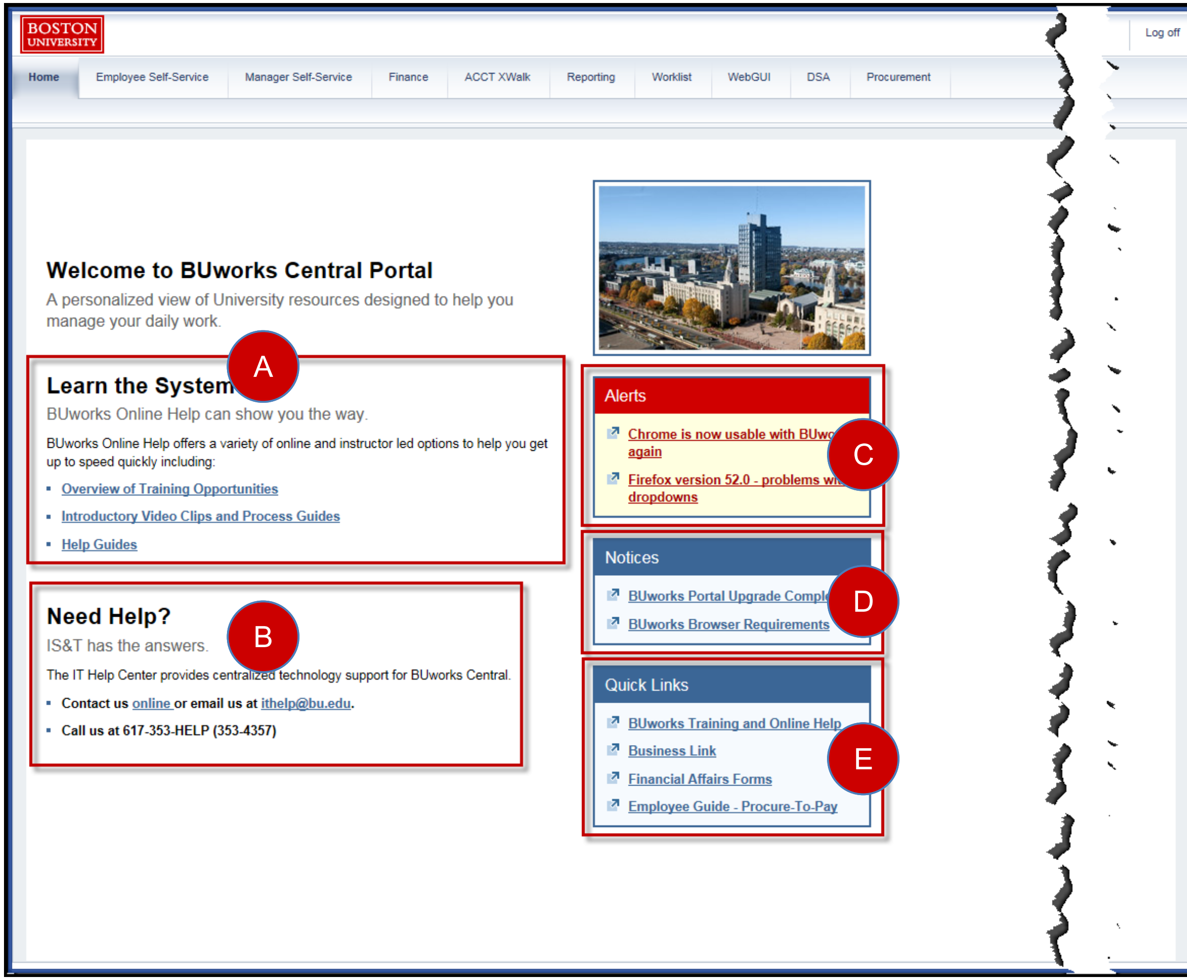

**Here are two ways to access BUworks Central portal.**

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

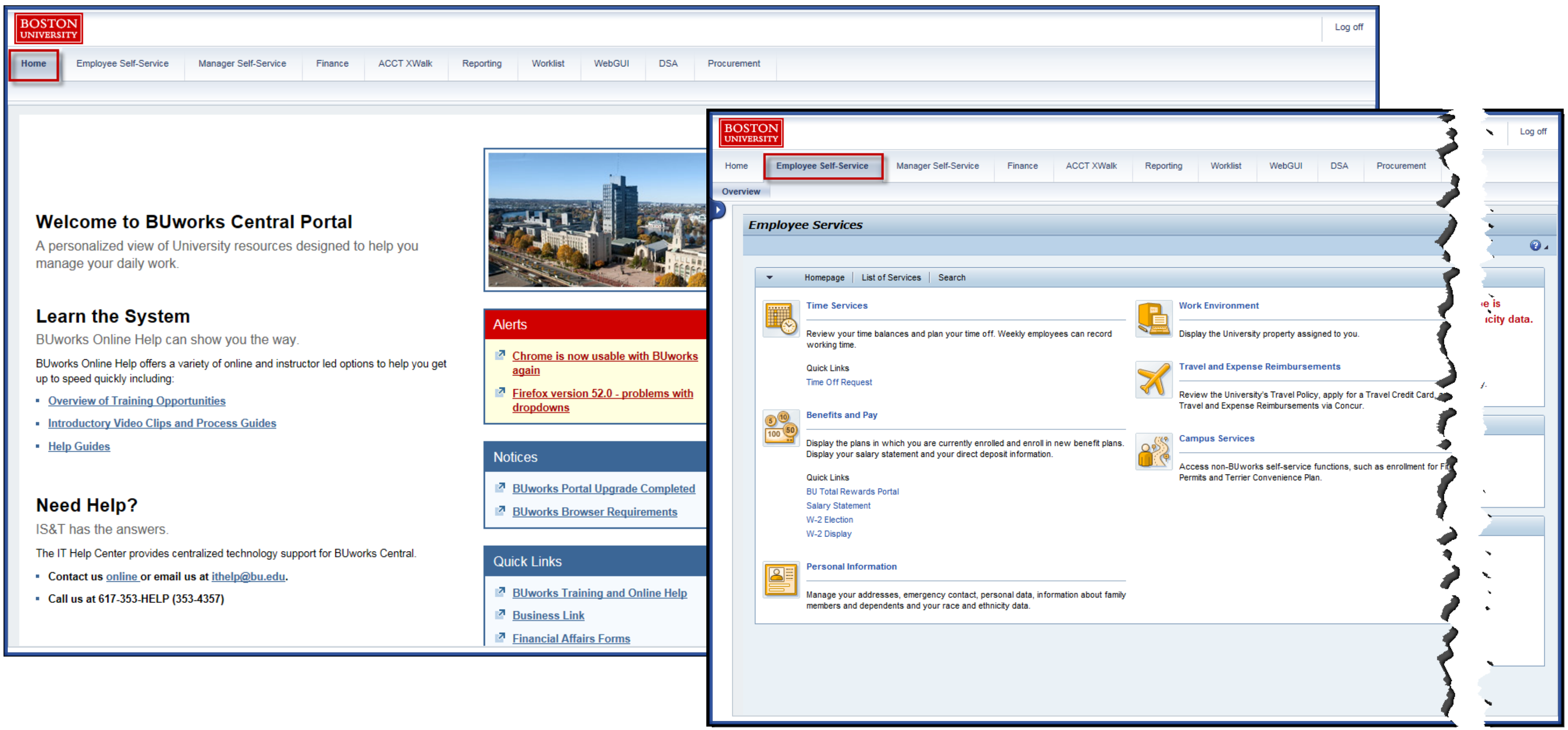
## High-Level Overview of Tabs

| 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. |

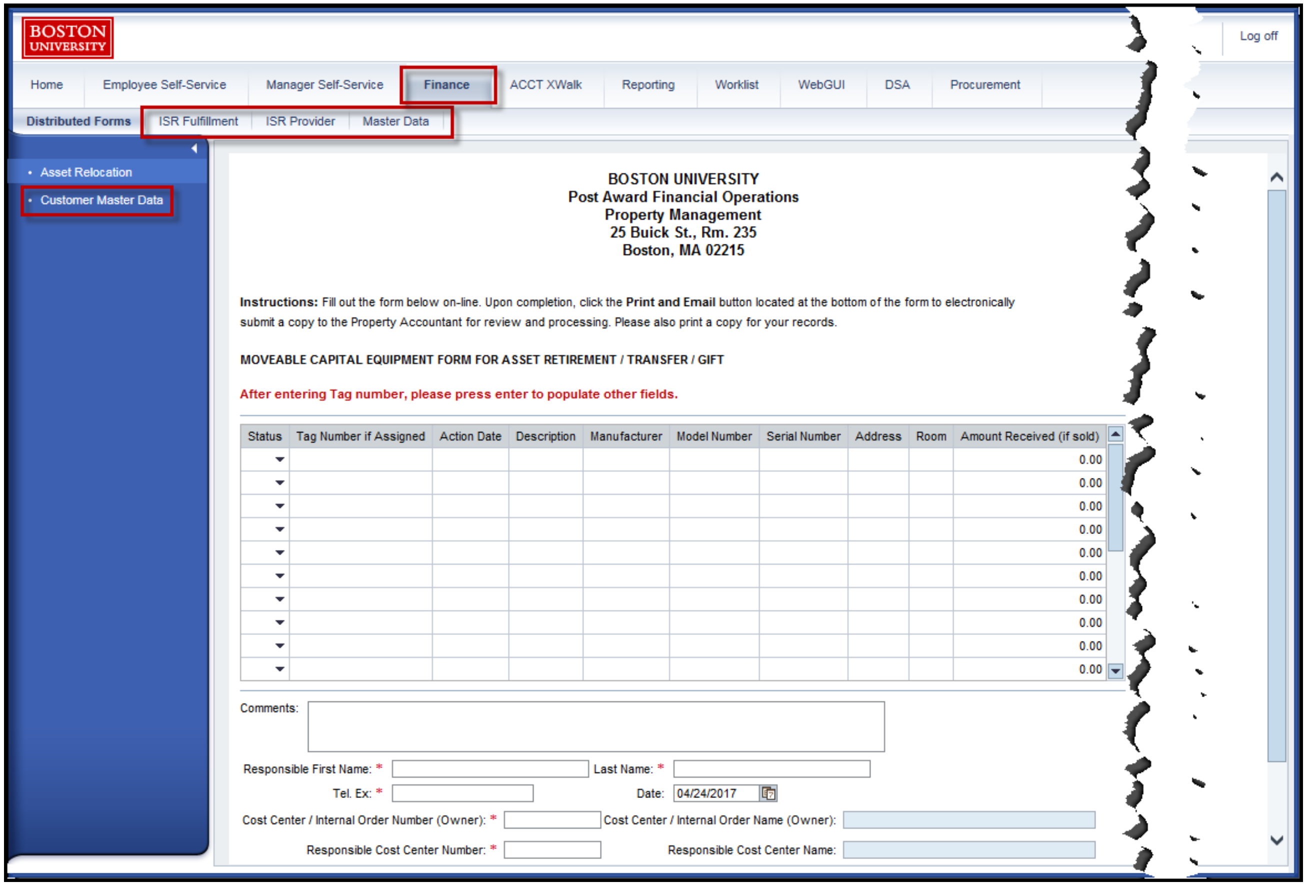
# BUworks Central Portal

## Two areas available to all Boston University Employees

- Home
- Employee Self-Service



# BUworks Central Portal
# Finance Tab



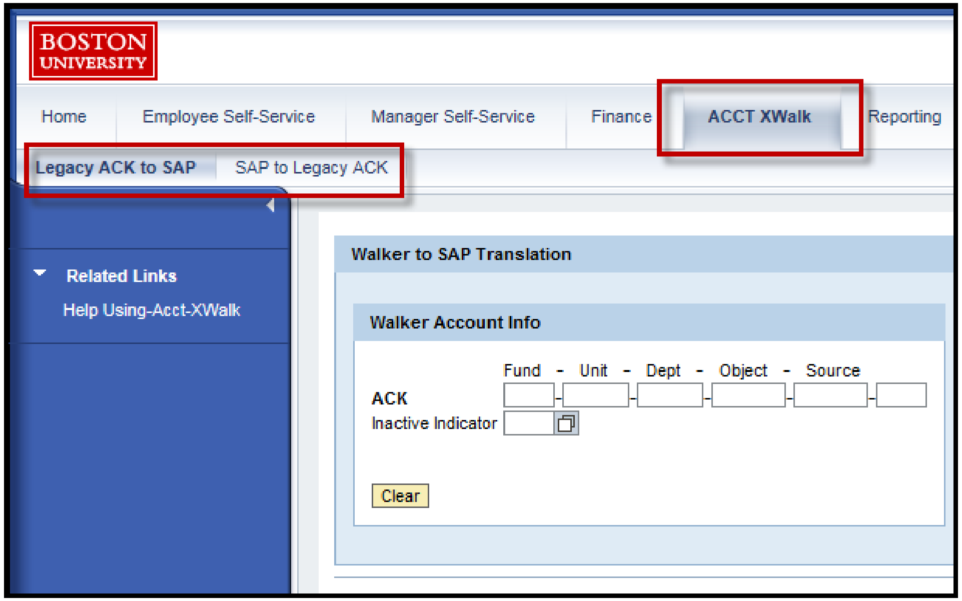

**Finance Tab**

- ISR Fulfilment
- 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




Additional Information can be found on the BUworks Online Help website.

# Worklist Tab

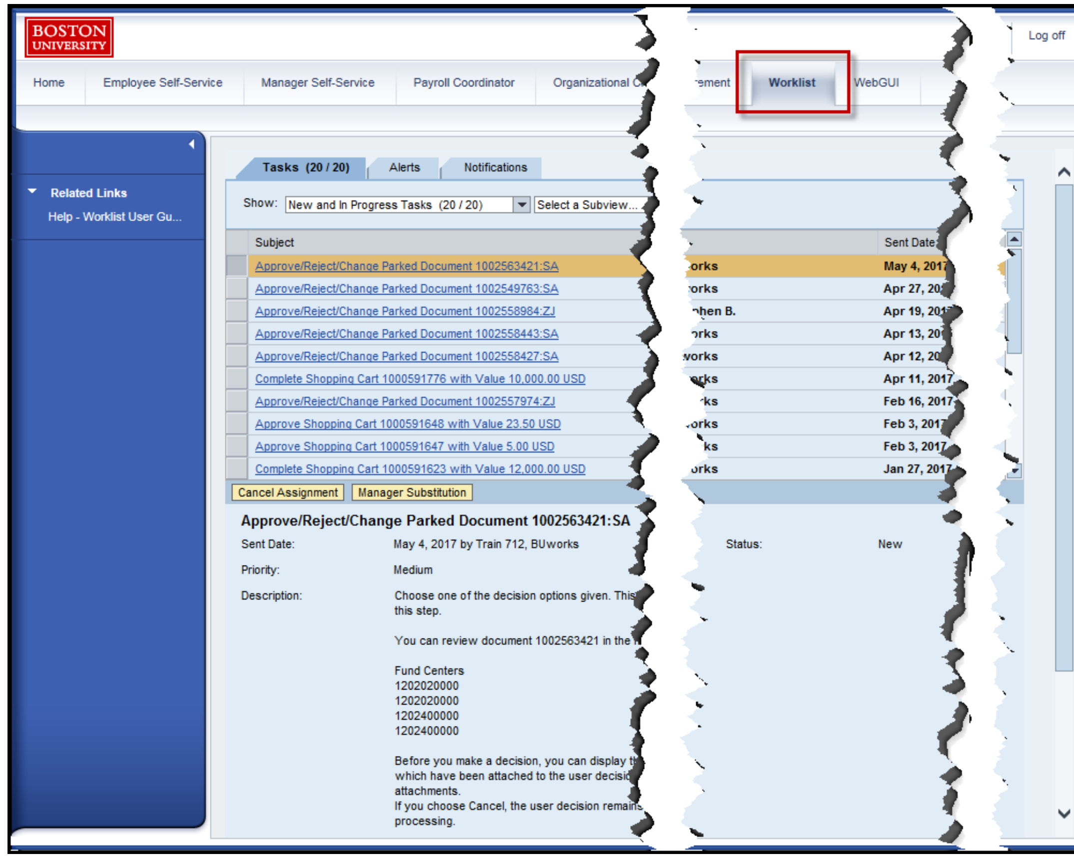
**SAP Worklist is where assignment of Financial:**

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

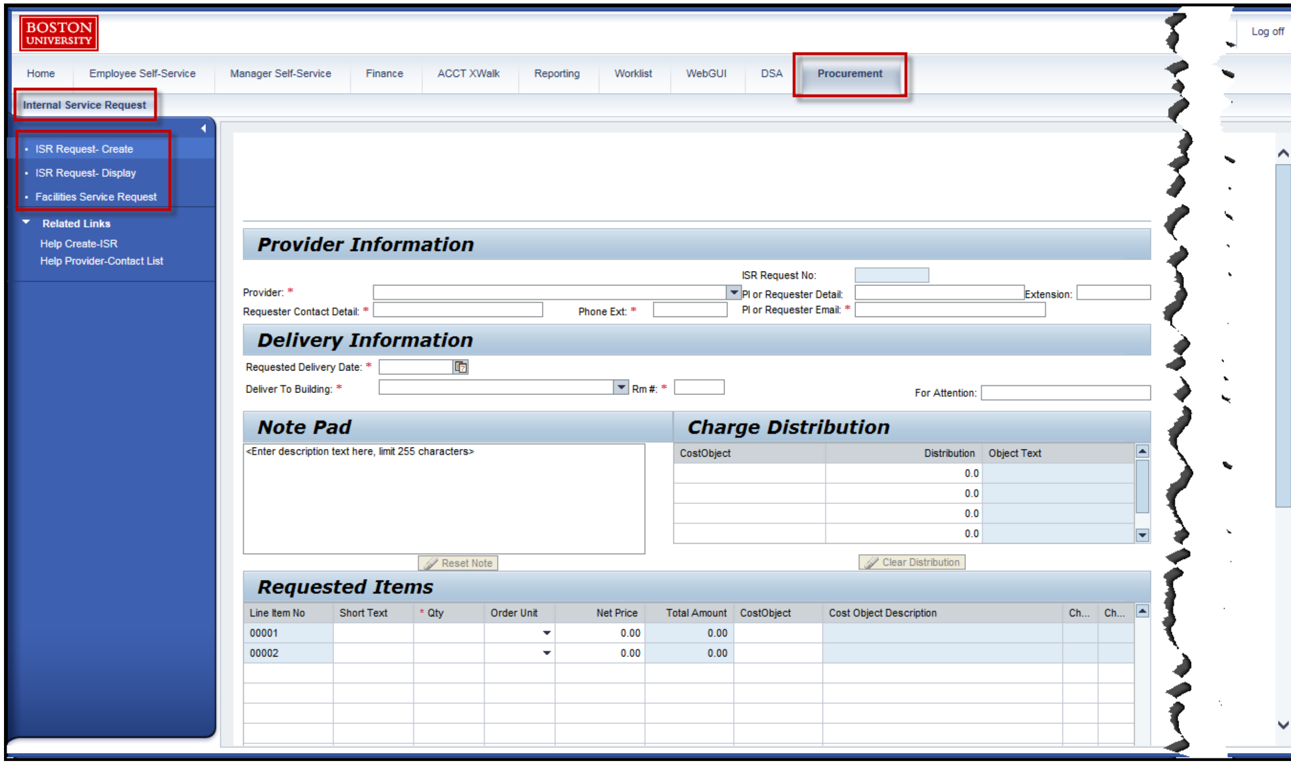
**Note:** this lab is specific to **SAP** Finance area.

Other **SAP HCM** related tasks, alerts, notification and workflow will also appear on

the assigned Worklist tab.



# BUworks Central Portal
# Procurement Tab




## Procurement Tab

- Internal Service Request
- Facilities Service Request

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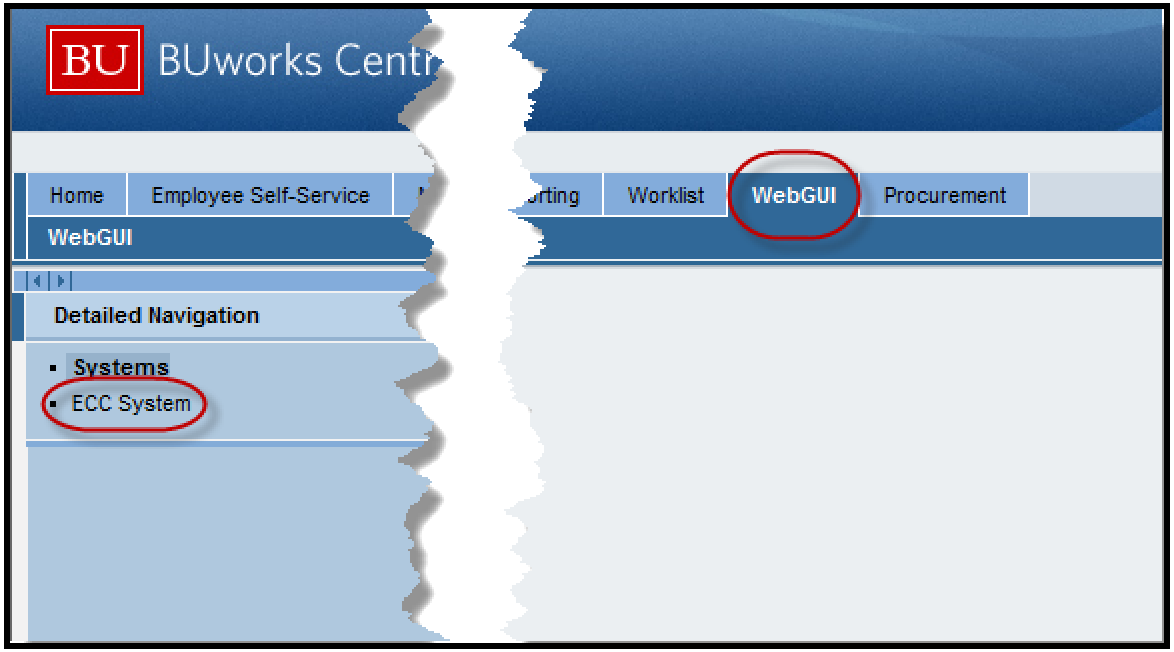
# WebGUI Tab

## What is WebGUI ECC System

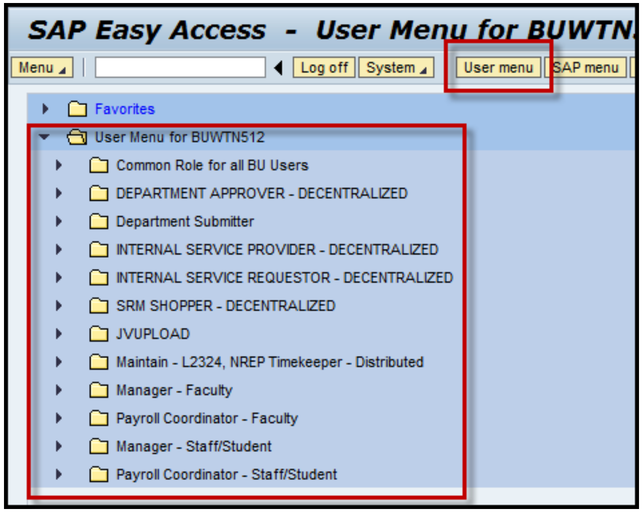
- The SAP Finance and Human Resource/Payroll transactional system were information is entered, changed and data is gathered.
- General Ledger for Boston University resides here.
- SAP Finance transactions codes.
- Transactions are created and displayed in real time.

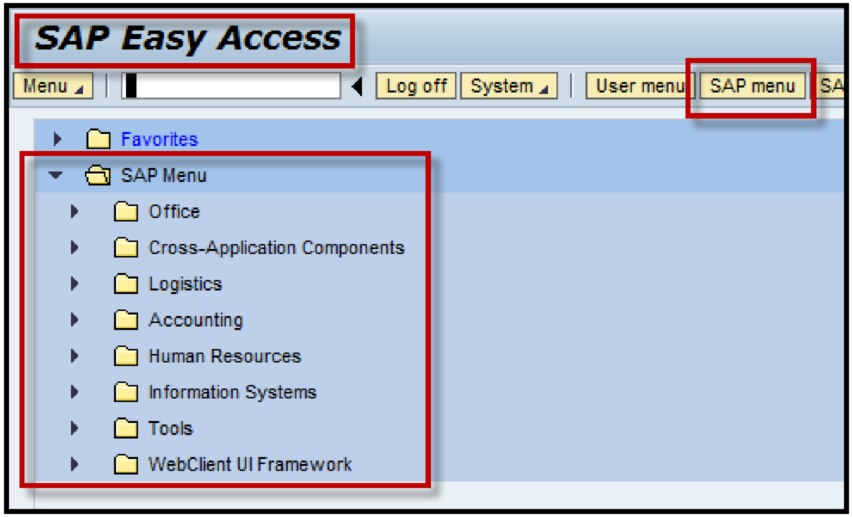


# SAP Easy Access

## 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**).



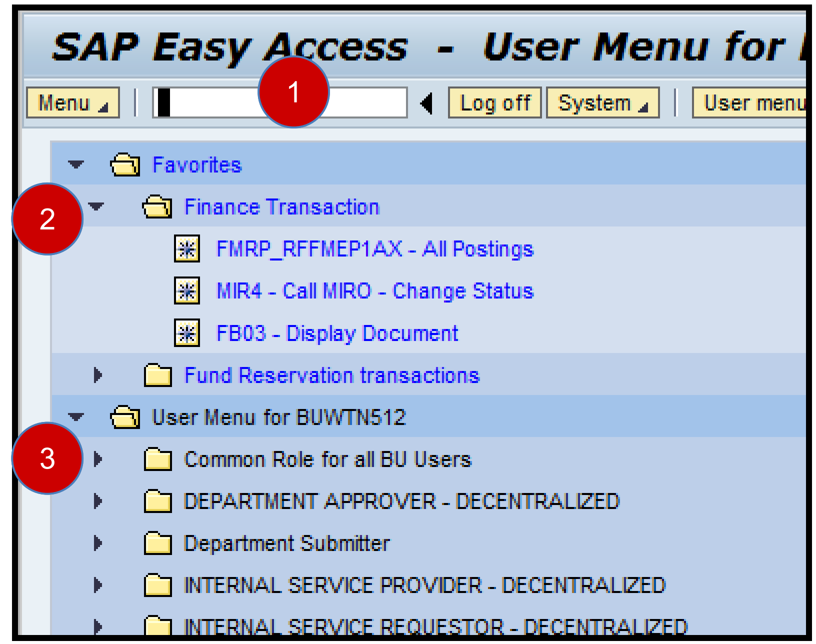

## User Menu and Authorization

- 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



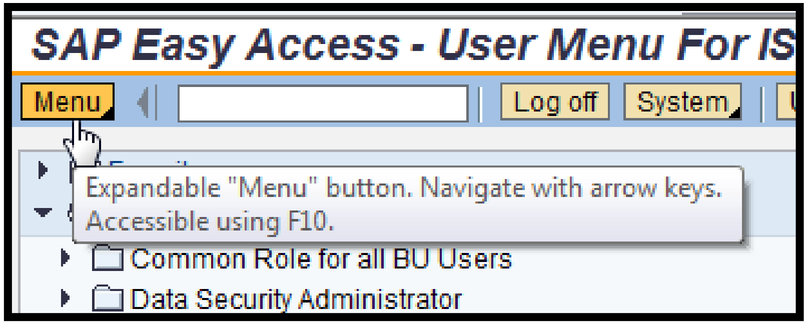
# WebGUI – SAP Easy Access

## 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

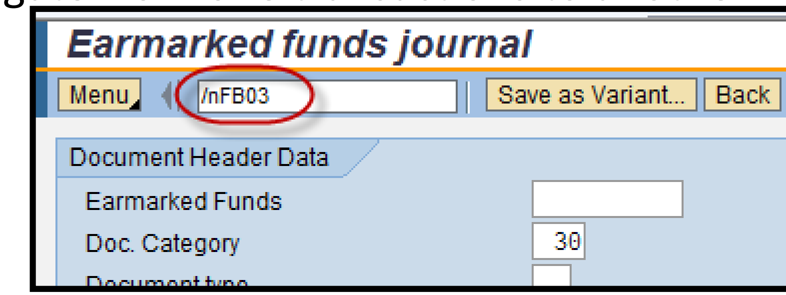
- **Red** – Error message – indicates a problem and must be correct before continuing
- **Green** – Information message no action is required.  System is informing you of a condition or fact. You must hit the Enter key to bypass
- **Yellow** – Warning messages indicates that there may be a problem with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

# WebGUI – SAP Easy Access

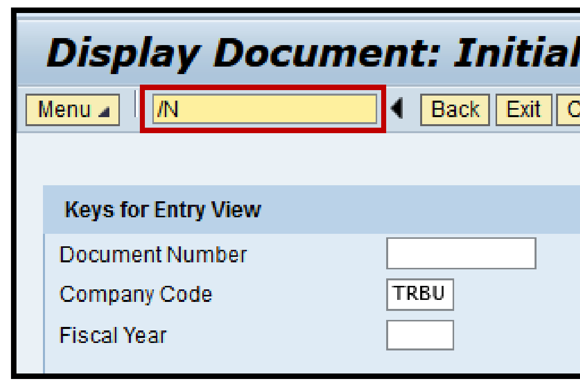
## Tips and Tricks

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

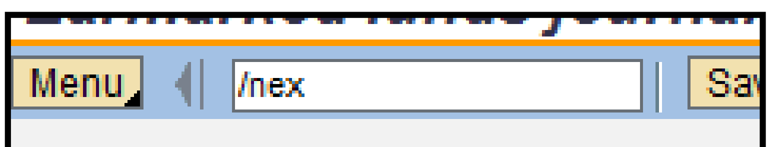
Example: Need to navigate to **FB03** without having to use the **Back** button




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



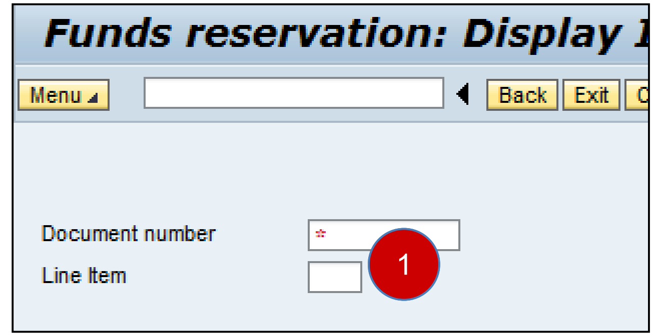

- **/NEX** - Exit/Log off WebGUI ECC System

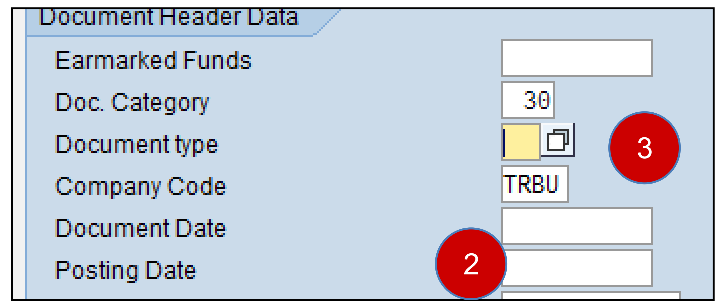


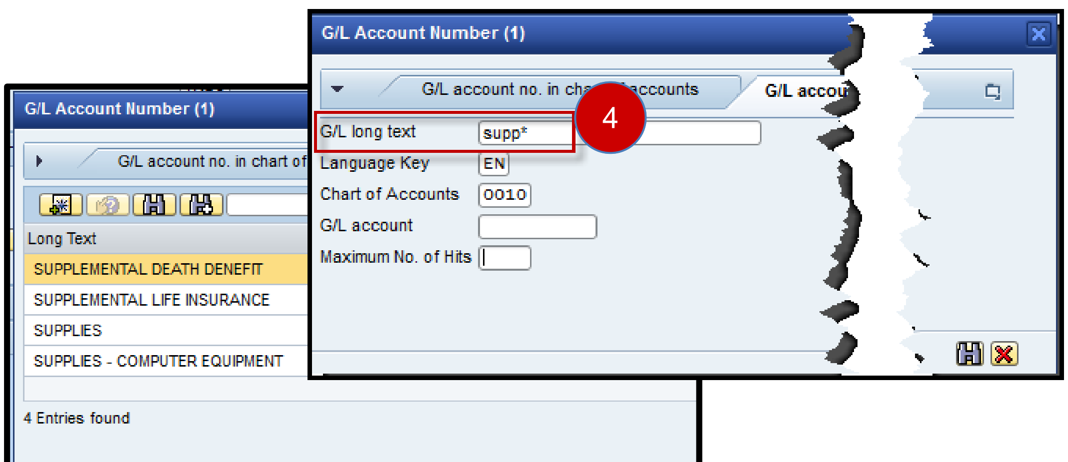
# WebGUI – SAP Easy Access

## 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*



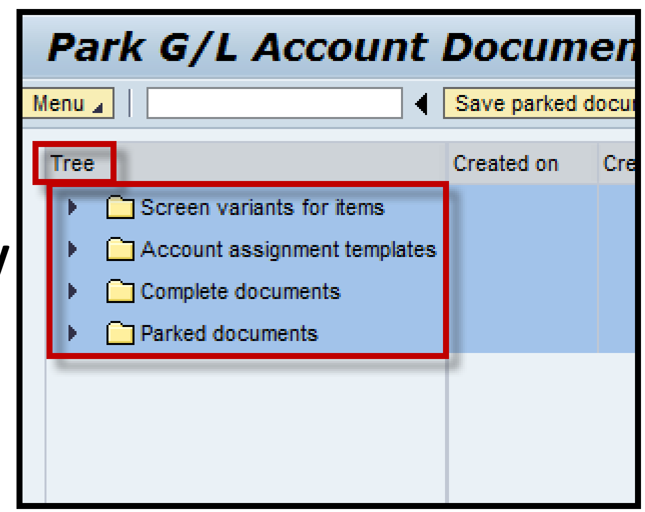



# SAP Smart Tools

## 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

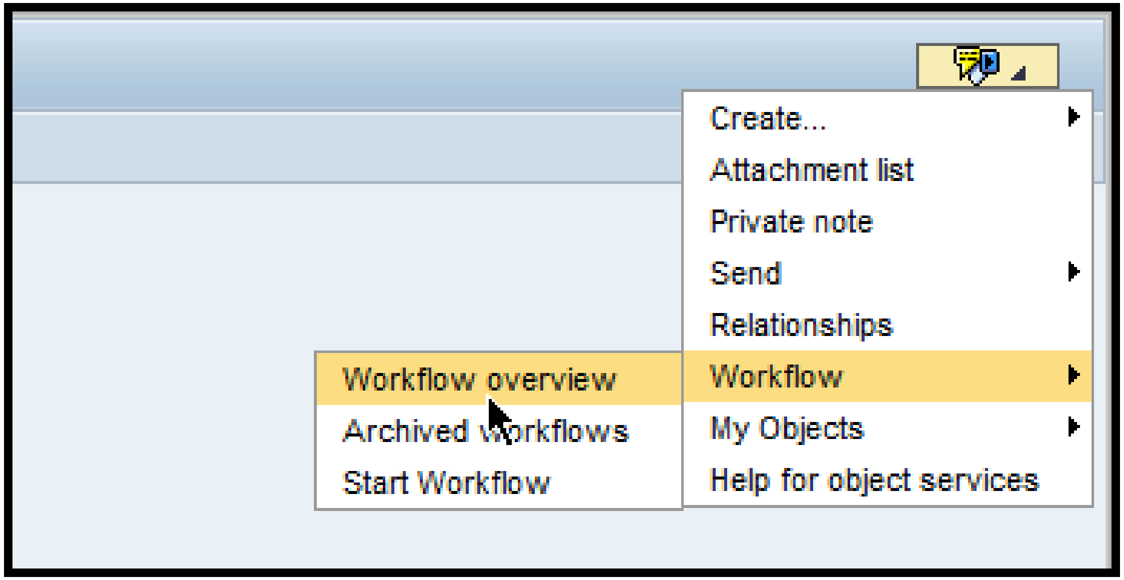



- **Account Assignment Template – Journal Entry**
  - Create Account Assignment template
  - Delete Account Assignment template

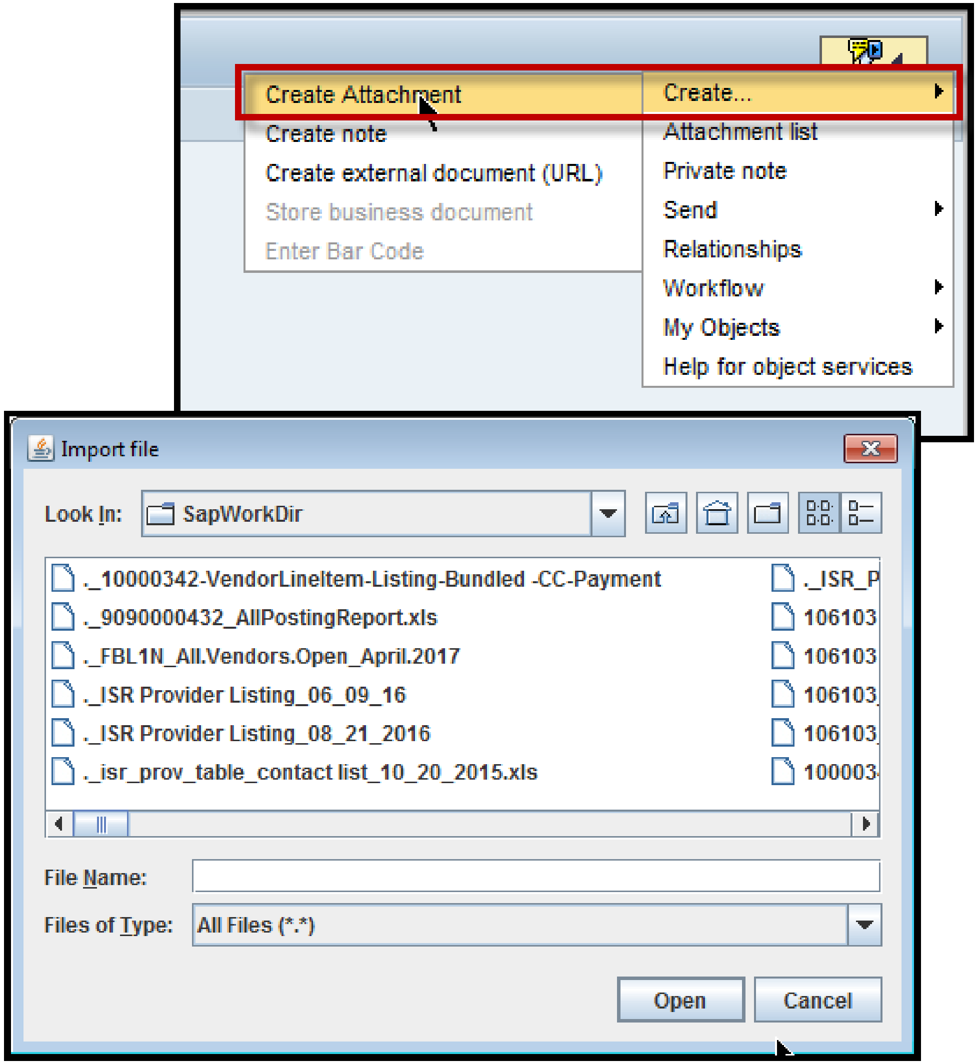
# Services for Objects Icon

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



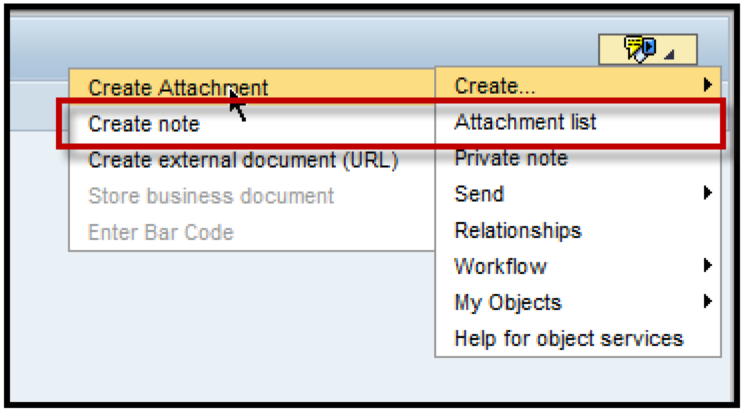
# Create an Attachment

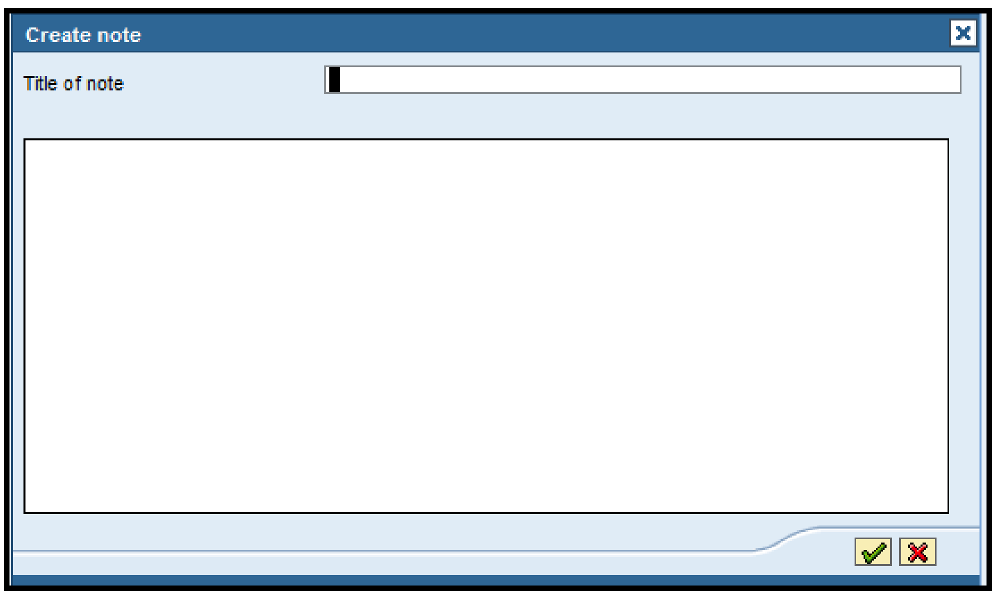



- Using the **Create** option from the dropdown menu you are able to add an attachment to the journal entry

- 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 Open button

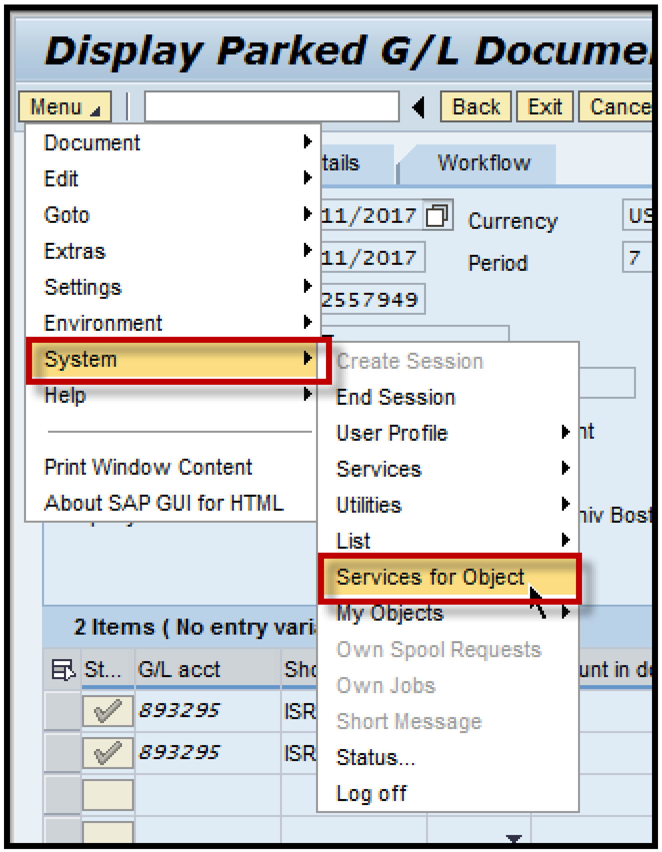
# Create a Note



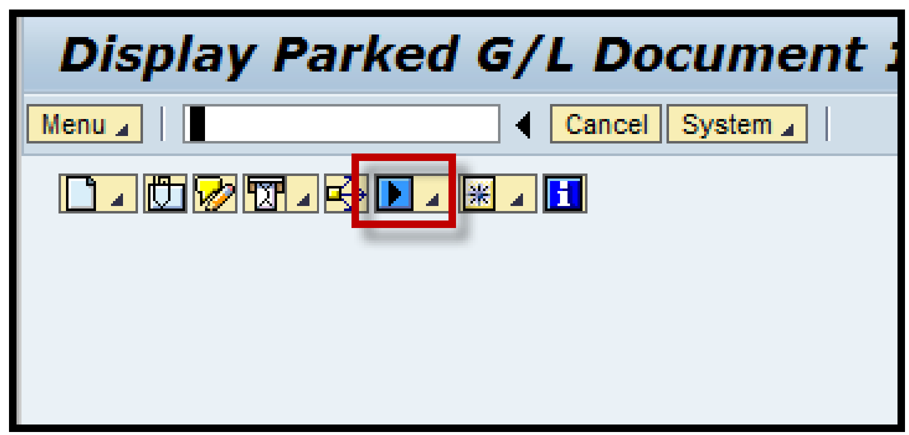

- Using the **Create** option from the dropdown menu you are also able to create  a note to the journal entry
- Once the Create note window opens, enter a title in the subject line and then the note in the free text filed
- Click ✔ to save the note

# 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



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# 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.

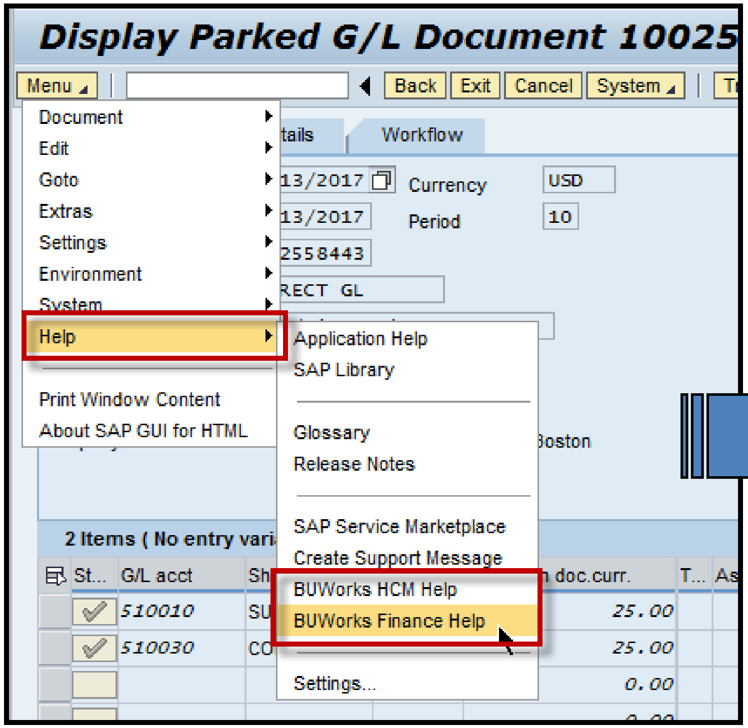
BUworks Online Help website is [http://www.bu.edu/tech/support/buworks](http://www.bu.edu/tech/support/buworks)

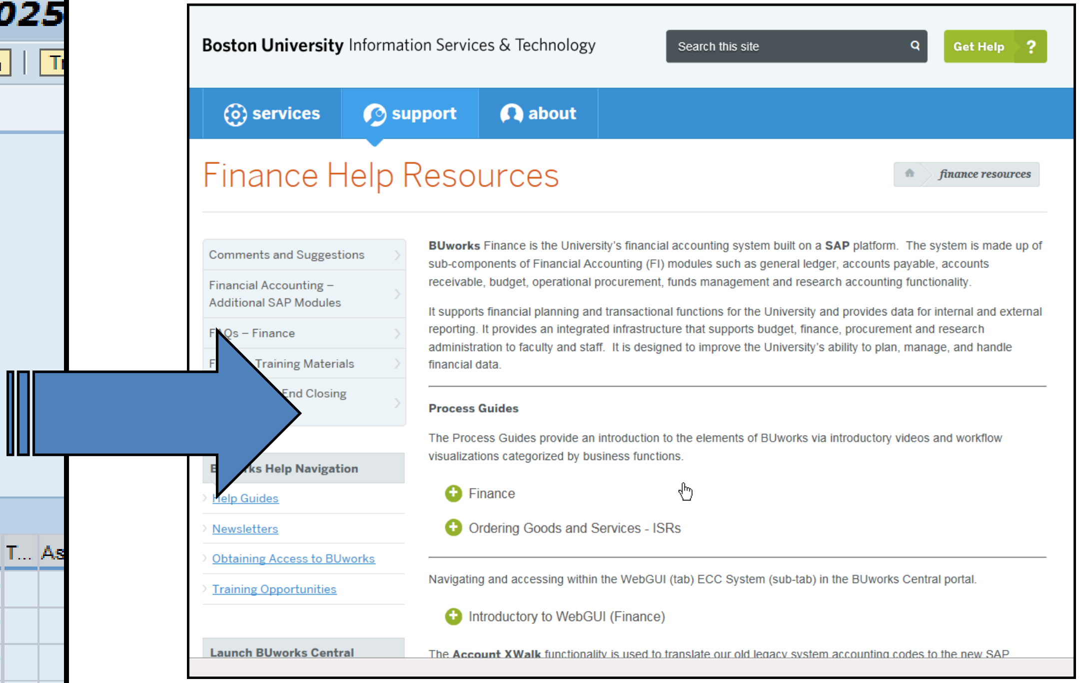
**Note:** While support documents can be printed or saved locally, it is recommended that users refer to help documentation online. This ensures that the information being referenced is current.

# 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.



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# 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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