

The Guide

Getting Started

Any system-approved SAP user may access SAP through the Portal, or the Texas State home page, simply by going to the home page, selecting the pull down menu for Faculty & Staff, and choosing the link to Future Administration System (FAS), or by going to www.fas.txstate.edu. This will take the user to the University's FAS/SAP Web page. The user should then click the link to log on to the Portal which will bring up the SAP logon screen.

Some users have a computer desktop icon called SAPGUI or SAPlogon-Pad which, when clicked, will take the user to a table where the line R1 (RP/3 Production) should be highlighted and clicked. Once chosen, the user will see the SAP logon screen.

Approvals

Time Approval

If you need to approve an employee's or employees' time, you may access their time entries through your workflow inbox, or through the transaction CATS_APPR_LITE. See the Quick Reference Guide under Time Approval for details.

Requisition Approval

If you need to approve a purchase requisition, simply follow the quick reference guidelines for transaction ZME55.

Reports

SAP reports provide valuable information, as long as the user understands one, what he or she needs from the report, and two, what information is critical to get to that information. Beyond that, the user needs to understand how to read the reports and decipher the information. The Financial Reports Quick Reference Guides highlight "what's what" in SAP reports.

Additionally, we've included a section called "Fundamentals" that outlines procedures such as layout, filter and sort – so you get the most out of your reports. Once you know these basics, tailoring reports so that you get what you need will be a snap.

Budget

If you need to access your college or division's current available budget, use transaction ZBUDACT, for the Budget to Actual Report. This report will show you your budget as well as budget activity, or actuals, such as expenditures, encumbrances and parked items. There are certain numbers and lines within this report that, when double-clicked, provide drill-down details such as document journals and check numbers. See the Quick Reference Guide under Financial Reports for more information.

Grant Budget

To review up-to-date grant budgets and expenditures, access transaction ZGM_GRANT_SUMMARY, for a Grant Summary Report. This report will allow you to review expenditure details for a grant.

Salary Fringe

To view a Salary Fringe report, use transaction ZSALFRINGE. This transaction will allow you to salary fringe activity. Within this report, you may choose “Detailed Report,” or “Drill Down Summary.” The “Detailed Report” option will provide the most information with the least amount of effort.

Salary Encumbrance

The transaction ZFM_SAL_RECON allows you to view the Salary Encumbrance Reconciliation Report. This report is used to reconcile salary expenditures with the Budget to Actual Report.

Operating Expense Report

This report is only for operating financial expenses. Transaction ZFI_OPER_EXP_RPT runs the Operating Expense Reconciliation Report for a Fund Center, an Internal Order or a WBS Element.

SAP Fundamentals

The SAP Fundamentals section of this book provides important information that makes working in SAP easier. For instance, we’ve provided details on how to set up a variant, which can be used for multiple transactions to save information for the next time and subsequent times the transaction is run; how to export data to Excel for easier spreadsheet accessibility; and how to set up your printer to print items from SAP.

If you require further help, please e-mail saphelp@txstate.edu.