Exercise 1 B6 Fundamentals

1. From the SAP Menu B6 Salary Detail
2. B6 Phase 1
3. Double click B6 Worksheet
4. Title Bar B6 Worksheet
5. Toolbar
6. Column Headers
7. Sort Ascending Icon
8. Sorted Data
9. Find Icon
11. Found Record
12. Salary Edit Form Icon
13. Green Back Icon
14. Download to Excel
15. Table button
16. Proceed with download
17. Click Application for Download
18. Green checkmark
19. Excel Spreadsheet
20. Information Message in SAP re MS Excel
21. Filter PNo
22. Error message for filter PNo
23. FInd Icon Again
24. Enter: [99000177] via the keyboard.
25. Highlight the record to work with
26. PNo. Filter
27. Filter Message
28. One record line displayed in worksheet
29. Removing Filter PNo
30. Data returns
31. Billed Salaries for Medicine
32. No billed salaries
33. Lock Icon
34. Unlock Icon
35. Filter on Fund Center
36. Fund Center list
37. Double click on Fund Center
38. Cost Center Filter
39. Include Subordinate Funds Centers
40. Note # of Records
41. Filter on Funds Center
42. Funds Center list
43. Double click All
44. Validate
45. Column Headers
46. Scroll bar at the bottom
47. Annual Salary 1
48. Annual Salary 2
49. Fiscal Salary
50. Funding FTE for Annual Salary 1 ................................................................. 52
51. Funding FTE for Annual Salary 2 ................................................................. 53
52. Highlight a record ...................................................................................... 54
53. Salary Edit Form ......................................................................................... 55
54. Click on Change Icon .............................................................................. 56
55. Mandatory fields ..................................................................................... 57
56. Save icon .................................................................................................. 58
57. Warning incomplete ............................................................................... 59
58. Enter the USWA grid step .................................................................... 60
59. USWA Grid Step List ............................................................................ 61
60. USWA Grid Step ................................................................................... 62
61. Validate your entries ............................................................................ 63
62. Notes ...................................................................................................... 64
63. Position Changes Dialogue Box ............................................................ 65
64. Save Button ............................................................................................ 66
65. Saved message ....................................................................................... 67
66. Back to Worksheet ................................................................................ 68
67. Side scroll bar ........................................................................................ 69
68. Edited record moves to bottom of worksheet ........................................ 70
69. Last Page icon ....................................................................................... 71
70. Exit B6. ................................................................................................. 72
Exercise 1 B6 Fundamentals

1. From the SAP Menu B6 Salary Detail

From your SAP menu select "B6: Salary Detail". B6 is the detailed salary expense budget record for each University appointed position within each CF Centre and Cost Centre.
2. B6 Phase 1

Click on B 6 Phase 1. The salary information which you will see has been derived from HRIS, based on February Payroll.
3. Double click B6 Worksheet

Double click "B6 Worksheet". The application will load data relevant to your user profile and present you with the Planning and Budget B6 Worksheet.
4. Title Bar B6 Worksheet

This is the "Main Menu" from which you will perform the B 6 process. The top row on the screen is the Title Bar confirming that you are in Planning and Budget B 6 Worksheet. Please check the data very carefully. It does not include billed salaries for the Faculty of Medicine, unfilled and TBA positions. For the Phase 1 budget process, please add or delete these positions as necessary.
5. Toolbar

This is your toolbar for the B6 Worksheet overview.
6. Column Headers

To sort records, you must select a Column. Point and click on the words in the Column Heading. The whole column will be highlighted.
7. Sort Ascending Icon

Select the "Sort Ascending" icon to list the data in alphabetical order (lowest to highest). To sort data from highest to lowest, use the "Sort Descending" icon.

![Planning and Budget B6 - Worksheet](image)
8. Sorted Data

Data is now displayed alphabetically.
9. Find Icon

To find a specific record, click on the binoculars on your main SAP toolbar.

Enter: the Personnel Number [99000237] via the keyboard.
11. Found Record

The record found will be displayed at the top of your worksheet. Select the box at the left to highlight the record you wish to work with.
12. Salary Edit Form Icon

then select the "Salary Edit Form" to view the details of the record.
13. Green Back Icon
Click on the Green Back button to get back to the worksheet overview.
14. Download to Excel

Before you proceed to edit the records in your B6 Worksheet, note the total number of records. Download the contents of your Original data by clicking on the "Excel Download" icon.
15. **Table button**

Select "Table"
16. Proceed with download

Click on the “Green Checkmark” to download your data in table format.

<table>
<thead>
<tr>
<th>First Name</th>
<th>Annual Salary</th>
<th>Annual Salary</th>
<th>Fiscal Salary</th>
<th>Fund FT</th>
<th>Fund FT</th>
</tr>
</thead>
<tbody>
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</tr>
</tbody>
</table>
17. Click Application for Download
If more than one application is available to you, select Microsoft Excel.
18. **Green checkmark**

Click on the "Green Checkmark" to confirm your selection.
19. Excel Spreadsheet

Maximize your view of the excel spreadsheet. Save the copy with the name "B6 Worksheet Original Data Phase 1". Close MS Excel and return to SAP.
20. Information Message in SAP re MS Excel.

While MS Excel is opening, a message in SAP will pop up asking you to "Save the data in the spreadsheet". Ignore it. If you select the Green Checkmark MS Excel will shut down before you have saved your data.
21. Filter PNo.

To look at all the lines for one personnel record, use the "Filter P #" icon.
22. Error message for filter PNo

If no row is highlighted for filtering, you will receive a warning "Please select a line with personnel number". To get rid of this message select the "Green Checkmark".
23. Find Icon Again

Select the "Binoculars" from your main SAP toolbar to find a record.
24. Enter: [99000177] via the keyboard.
Enter: [99000177Backspace Key8] via the keyboard.
25. Highlight the record to work with

Highlight the row of the record.
26. PNo. Filter

Now Filter on the Personnel Number.
27. Filter Message

Note that a message appears above the worksheet indicating that your filter is on Personnel Number: 99000178.
28. One record line displayed in worksheet

Only line items related to Personnel Number 99000178 will be displayed in your worksheet.
29. Removing Filter PNo.
To remove the filter, return to the B6 Toolbar and click on the "Filter P #" icon.
30. Data returns
All the records in your spreadsheet will be displayed.
31. Billed Salaries for Medicine

The icon for "Filtering on Billed Salaries" is applicable to divisions and departments within Medicine for GLs 800107, 800113 and 800423.
32. No billed salaries

The initial data load for B6 Phase 1 will not include Billed Salaries.
33. Lock Icon

When you have finished entering and making changes to your B6 Worksheet lock your records by clicking on the "Lock" icon.
34. Unlock Icon

The "Unlock" icon can only be used by your Divisional Finance or Planning and Budget Officer. To unlock your data, you will need to call them.
35. Filter on Fund Center

You can view your data by filtering on Funds Center.
36. Fund Center list

Click on the "drop down" box to display the Funds Center hierarchy for your data.
37. Double click on Fund Center

A list will appear displaying all your authorized funds centers. Double click on Funds Center # 100413 to view only records for the Dean's Other C F C.
38. Cost Center Filter

You can also specify what data to view by Cost Center.
39. Include Subordinate Funds Centers

Turn on "Include subordinate Funds Centers" to display all Funds Centers that are below the current hierarchy. Note: You must select a top level Funds Center to filter on for this to work.
40. Note # of Records

Note how many record lines are in your original B6 load before you hit the "Enter Key" from your keyboard to validate your Funds Center and Cost Center filter.
41. Filter on Funds Center

There are 11 records which meet your filter criteria. To retrieve all your original data, remove one filter at a time. Deselect "Include subordinate Funds Centers".
42. Funds Center list

Return to the "Funds Center Selected" field and select the "Drop down" box to view the Funds Center hierarchy.
43. Double click All
Double click "All".
44. Validate
Hit the "Enter Key" from your keyboard to validate your entries.
45. Column Headers

All your data has been restored. In the worksheet overview, you can sort any of the columns displayed: Fund Center, Cost Center, Personnel-Sub Area, Personnel Number.
46. Scroll bar at the bottom

Use the scroll bar at the bottom of the worksheet to move across the columns.
47. Annual Salary 1

Annual Salary 1 is the salary amount for the first two fiscal periods - May 1 to June 30.

<table>
<thead>
<tr>
<th>Funds Center</th>
<th>Cost Center</th>
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<th>P对着, Pay No, 01 Name</th>
<th>Annual Salary</th>
<th>Annual Salary</th>
<th>Fiscal Salary</th>
<th>Fund T.</th>
<th>Fund T.</th>
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</tr>
</tbody>
</table>

Total Records: 250
48. Annual Salary 2

Annual Salary 2 is the salary amount for fiscal period 3 to 12 - July 1 to April 30th.
49. Fiscal Salary

Fiscal Salary column is the salary budget cost for the year.
50. Funding FTE for Annual Salary 1

Fund FTE 1 is the total funding percent for the first two fiscal periods, May 1 to June 30.
51. Funding FTE for Annual Salary 2

Fund F T E 2 is the total funding percent for fiscal periods 3 to 12, July 1 to April 30th.

<table>
<thead>
<tr>
<th>Cost Center</th>
<th>Funds Center</th>
<th>Payroll Acc</th>
<th>Payroll Period</th>
<th>First Name</th>
<th>Annual Salary</th>
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<td>CATHY</td>
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</tr>
</tbody>
</table>
52. Highlight a record

Highlight a row to enter the "Salary Edit Display" form.
53. Salary Edit Form

Click on the "Salary Edit Form" icon from your B6 Toolbar.
54. Click on Change Icon

The first icon on your toolbar in the B6 detail screen allows you to make changes to the record. Click on the "Change" icon to go into edit mode.
55. Mandatory fields

When you enter "Edit - Update" mode, your toolbar disappears. The fields in the record that can be edited are now white. All blue fields are mandatory. To save your changes or confirm that the information in this record is correct, an entry must exist in the mandatory fields.
56. Save icon

Once you have verified the record save your changes by clicking on the "Save" icon from the S A P toolbar.
57. Warning incomplete

If you attempt to save your data with mandatory information missing, you will receive a warning message at the bottom of your screen. Your changes will not be saved until all mandatory entries are completed.
58. Enter the USWA grip step

Click on the box to type in your entry.
59. USWA Grid Step List

You can see a list of available grip steps for the related "Pay Scale Group" by clicking on the "drop down" box.
60. USWA Grid Step

Highlight your selection from the list and double click or click on the "Green Checkmark".
61. Validate your entries

Always validate your data by hitting the "Enter" key from your keyboard. The system will prompt you with any further outstanding warning messages.
62. Notes

You can add notes relevant to the Planning and Budgeting process in the "Notes:" box. Click on the "Text Bubble" icon to add more lines.
63. Position Changes Dialogue Box

In the "Position changes:" dialogue box at the bottom right of your screen, the system will track your actions.
64. Save Button

When you have finished editing the record, select the "Save" icon.
65. Saved message

In the Position changes: dialog box the system has recorded that you have edited the salary increase form. At the bottom of your screen you will also see a message that confirms your Record has been successfully changed.
66. Back to Worksheet

Click on the "Green Back Arrow" icon from your SAP menu to go back to your worksheet.
67. Side scroll bar

Use the scrollbar at the side to move up and down the worksheet.
68. Edited record moves to bottom of worksheet

The record you finished editing will be at the bottom of your worksheet.
69. Last Page icon.

You can also click on the "Go to Last Page" icon to get to the bottom of your worksheet.
70. Exit B6.
This concludes the B6 Fundamentals Tutorial. Please proceed to "Exercise 1: Add a New Position".