This manual describes how to use the SAP Budget System. If you have questions or need assistance, please contact the Budget Office (x7200).

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I. Logging in to the SAP Budget System

You must have an SAP user ID to access SAP. If you do not have an SAP user ID, please contact Michael Moseley, SAP Training Coordinator, at x1539 or mbmosele@olemiss.edu.

A. Expand the folder “UM Budget Preparation” in the SAP menu, and double click transaction “ZBG10 – Salaries and Wages.”

B. The Search Organizational Unit for Salaries and Wages screen will be displayed. This screen is to search for your department or unit. The first section will populate with the default values Fiscal Year “2019” and Period “Budget Preparation.”

C. Search for your unit by typing the department name, or a shortened version of it, into the “Search Organizational Unit” box (i.e. Biology, Hist, etc.), and press ENTER. If an abbreviated name is entered, a screen will appear that gives selection options based on the text entered. Double click your department name, or highlight and click the green check icon.
Click the Execute icon on the Search Organizational Unit for Salaries and Wages screen, and the departmental Salary and Wages budget should appear on the next screen.

The Salary and Wages budget screen displays the following options: Search Employee Name, Refresh, Download Salary/Wage Data, Position Maintenance, Add/Delete Fund Source, Add New Position, Delete Position, and Undo Delete.
• “Search Employee Name” – click the icon and enter the person’s name you wish to modify in the search box that appears. If the person is in the current departmental budget, the screen will scroll so the name entered will be in the top row.

• “Download Salary/Wage Data” – this will convert your budget to a downloadable format that may be put into a spreadsheet for sorting, filtering, calculating, etc.

**NOTE:** You must still enter budget information into the SAP budget system.

“Undo Delete” and “Add New Position” are accessible to the Budget Office and Human Resources only. If you delete a position in error, you must contact the Budget Office (x7200) to undo the delete. If you need to add a new position, contact Human Resources – Compensation & Classification (x5430). Detailed information is required in order to enter the position in SAP.

## II. Changing Salary or Wage Amounts

### A. To change a salary, click the “Inc-Dec” box in the position line you wish to change and enter the amount to increase/decrease, or you may enter a percent in the “Per %” box, and the “Inc-Dec” amount will calculate. If you wish to decrease the salary/wage amount, enter minus (-) before the amount. Press ENTER. Fringe amounts will automatically be calculated on salaries and wages based on the budgeted fringe rate.

**NOTE:** If an incorrect figure is entered, the amounts in the “Inc-Dec” AND the “Per %” box must be deleted. Enter the correct amount and press ENTER again for the change to take effect.

### B. Information for Budgets with Contracts and Grants

A new account number should be provided for employees paid from contract or grant accounts with an end date of July 15, 2018 or earlier PRIOR to submitting your budget. If
the end date is between July 16, 2018 and June 30, 2019, the existing budget may still be used for budget preparation.

**NOTE:** An electronic personnel form (E-form) must be submitted via myOleMiss prior to the contract or grant end date providing a new account number. The end date for the contract or grant is shown to the right of the account number in the applicable row in the budget in this format: 20180715.

### III. Position Maintenance (limited accessibility)

**A.** If the title of the position, the number of months, the FTE, or the Job Class needs to be changed, contact the Budget Office (x7200). Only the “Proposed” fields (white boxes) may be modified.

**B.** If you are completing a budget with a department chair or director who receives an administrative supplement, contact Human Resources (x5235).

### IV. Adding a Position (only accessible by Budget Office and Human Resources)

**A.** Contact Human Resources (x5430) to be sure classified positions have been established through the classification system. If the position to be added is a classified position, paperwork must be submitted to Human Resources before the position can be added to
the budget. It may be necessary to add the funds available for the position to a (non-student) miscellaneous wage position until the new position can be classified.

B. The following information is required to add a position during the budget process:

- SAP Position number
- Social Security number (if filled)
- Number of months (9 or 12)
- Pay Type (salary or wage)
- Title of position
- Person’s name (if filled)
- Source of Funding (see list below)
- FTE
- Increase (annual salary or wage amount)

**SOURCE OF FUNDING**

<table>
<thead>
<tr>
<th>CODE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>BP</td>
<td>Department Budget (general budget)</td>
</tr>
<tr>
<td>FA</td>
<td>From Account (fund 25, 30, 35, 36, or 38)</td>
</tr>
</tbody>
</table>
V. Deleting a position

A. Display Salary and Wages budget.

B. Click the gray box on the left side of the row to highlight the line/position. Click “Delete Position.” This reduces the proposed salary/wage amount for each applicable line to zero, but the name, position number, FTE, and cost distribution are not eliminated.

C. If a position is deleted in error, please contact the Budget Office (x7200) to undo the deletion.

VI. Adding a Fund Source

A. Display Salary and Wages budget.

B. Click the gray box on the left side of the row to highlight the line/position. Click “Add/Delete Fund Source.”

C. On the next screen, enter the following:

1. Source: click the drop down arrow under “Source” and select the appropriate code for the source funds [see section IV, B for code listings].

   **NOTE:** Only BP or FA should be used.

2. Click the box under “Increase” and enter the change amount.

3. Click the box under “From Acct” and enter the new funding source account number. This number must be valid and active. If you receive an “Invalid Cost Center” message when entering a fund 25, 30, 35, 36, or 38 account, contact the Accounting Office (x7681).
4. Press ENTER to save your entries. The FTE will automatically recalculate. Click the green back arrow to return to the Salary and Wages screen.

5. Verify the Proposed total dollars row for that position.

6. If an error was made, highlight the FIRST row of the position (other lines for the position will not work), and click the “Add/Delete Fund Source” button. On the next screen, highlight the line you wish to change and click the “Delete Fund Source” button. This will remove the amounts previously entered.

7. Highlight a line below all of the lines for that position and click the “Add Fund Source” button. You will need to enter the correct amount and fund source number. Press ENTER.

8. Click the green back arrow, and verify the totals again.

VII. Deleting a Fund Source

A. Display Salary and Wages budget.

B. Click the gray box on the left side of the row to highlight the first row in the line/position from which you wish to delete the fund source. You must select the FIRST line (primary fund source) of the position or you will be prompted to “select a valid row.” Click “Add/Delete Fund Source.”

C. Highlight the row you wish to delete and click “Delete Fund Source.” The FTE will automatically recalculate. Click the green back arrow to return to the Salary and Wages screen.

D. Verify the Proposed total dollars row for that position.

VIII. Changing Operating Categories

A. Expand the folder “UM Budget Preparation” in the SAP Menu, and double click transaction “ZBG20 – Budget Summary.”
B. Enter the department name, or a shortened version of it, in the “Search Organizational Unit” box (see Section II, B and C). Press ENTER, then Execute.

**NOTE:** At this point, you may download your budget data into a spreadsheet by clicking the download icon.
C. Increasing/Decreasing Categories Operating Categories

1. Categories other than Salaries, Wages, and Fringes may be increased or decreased on the Budget Summary screen. Fringes will be automatically calculated based on the budgeted fringe rate. See Section II for instructions to change salaries and wages.

2. Click the “$ Increase” or “% Increase” box of the category you wish to increase or decrease. To reduce a category, enter minus (-) before the amount. Press ENTER.

3. If there is already a value in the “$ Increase” and “% Increase” boxes, you must delete the amounts from BOTH boxes and enter the new value, or the change will not take effect. Press ENTER.

4. After all category changes have been made, the budget may be approved by the department chair/signatory officer by clicking the “Approve Budget” button on the screen.

IX. Budget Review and Approval Process

After the department chair/signatory officer has approved the budget, the next level of approval (Dean) will receive an email message stating that the budget is ready for approval.

A. To determine if a budget is ready for your approval:

1. Expand the folder “UM Budget Preparation” on the SAP Menu. Double click transaction “ZBG30 – Approval Review.”

2. Enter the department name, or a shortened version of it, in the “Search Organizational Unit” box (see Section II, B and C). Press ENTER, then Execute.

   NOTE: You cannot access a list of all budgets for which you are signatory and/or which report to you. You will need to enter each department name in the Search String and approve each budget on the Budget Summary screen.

3. The next screen, Approval Status, will show you the approval units and the approval status of the budget in question.
Status “U” – not approved by the person whose name is shown on that line
Status “A” – approved by the person whose name is shown on that line
If “A” appears in all levels prior to your level, it is ready for your review

**NOTE:** If you are signatory officer on a budget that reports or rolls up to another budget for which you are signatory officer and the approvals are immediately following each other, you will only need to approve it once.

**B. To approve a budget:**

1. Expand the folder “UM Budget Preparation” on the SAP Menu. Double click transaction “ZBG20 – Budget Summary.”

2. Review the budget information. If you are ready to approve, click the “Approve Budget” button. The status field will show “A” for approved, and the other information will be updated.
X. **Printing the Budget**

On the *Salaries and Wages* screen or on the *Budget Summary* screen, you can click the printer icon at the top of the screen to view or print your budget at any point within the timeframe that the SAP budget system is available for you.

On the *Budget Report* screen, click the printer icon again. Select your SAP printer, then click the green check icon. If the budget does not print correctly, go back to this screen and choose or enter in the “Format” box: x_90_120.