PCR Initiation Guide

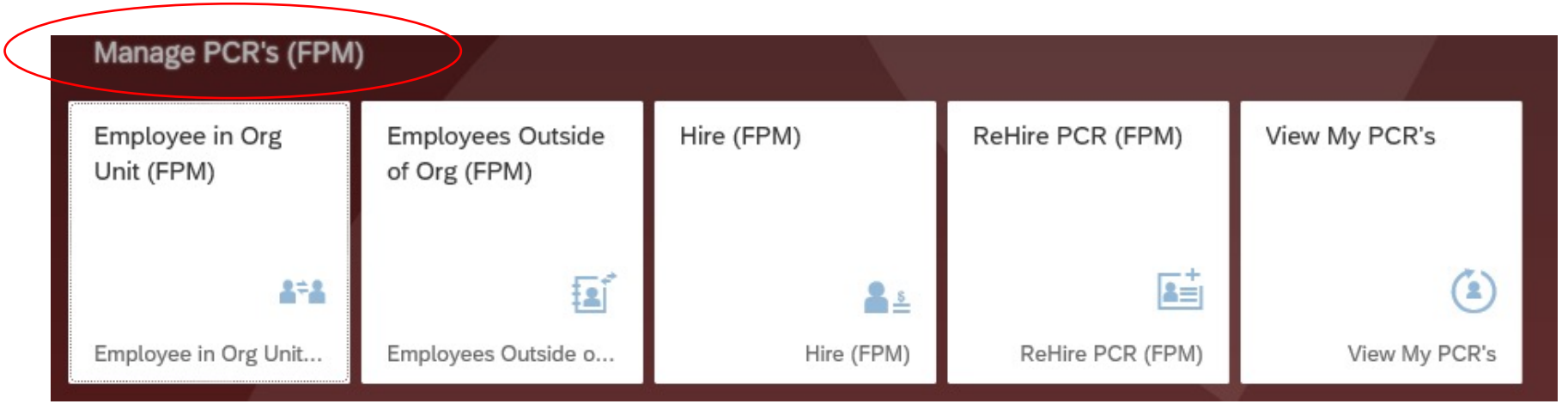
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The rising STAR of Texas

Getting Started

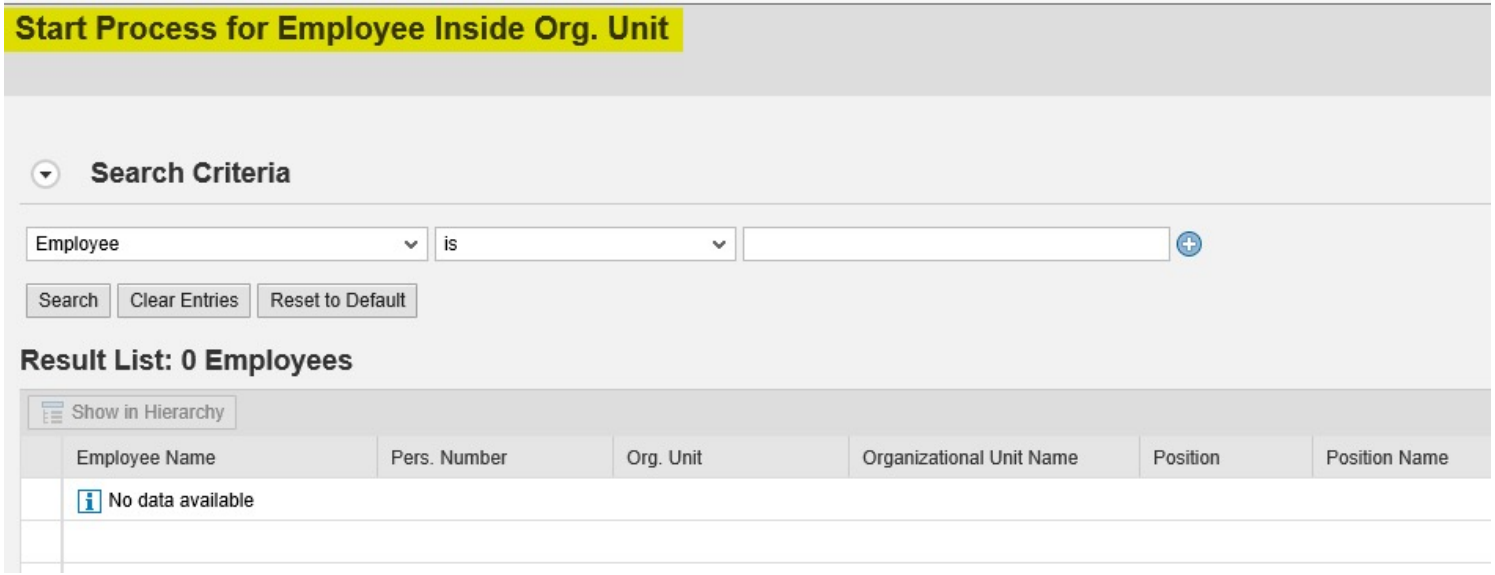
- Log in to the SAP portal from the Texas State homepage.

- Find the group called “Manage PCR’s (FPM)



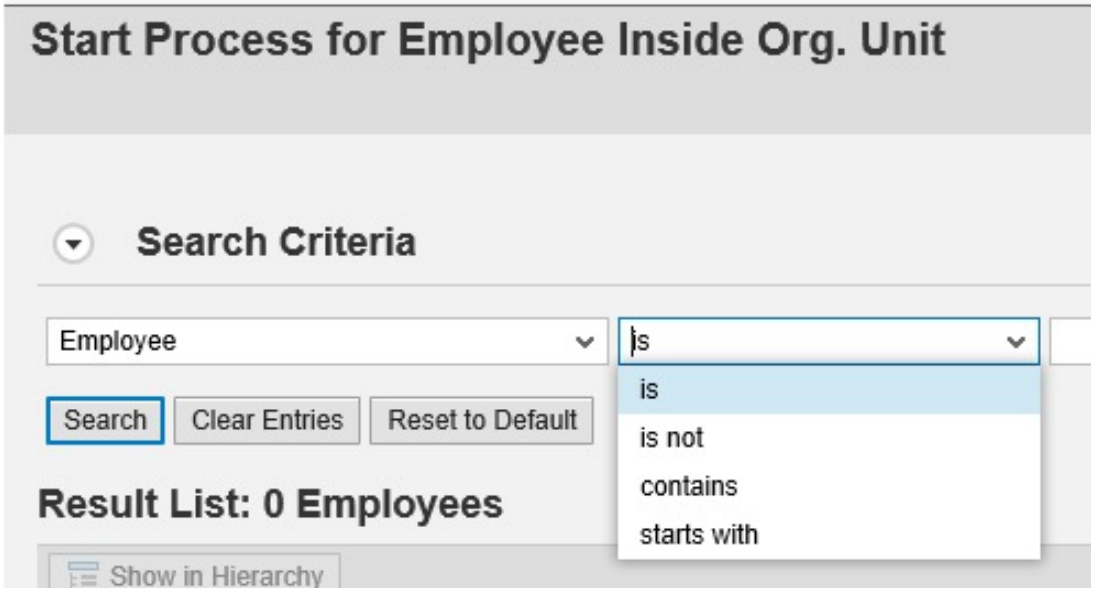
Employees In Org Unit

- Click the tile ***Employees In Org Unit*** to initiate a PCR for an employee inside your org and this page displays.

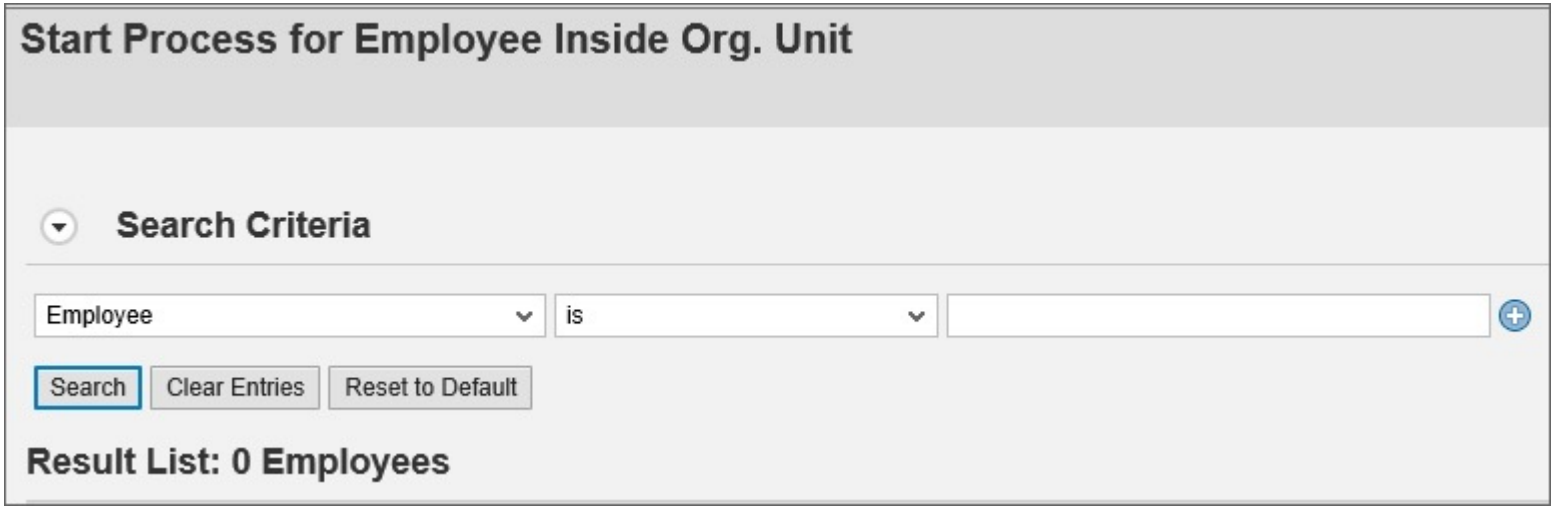


Employees In Org Unit

- New search options are available to find your employee.



Start Process for Employee Inside Org. Unit



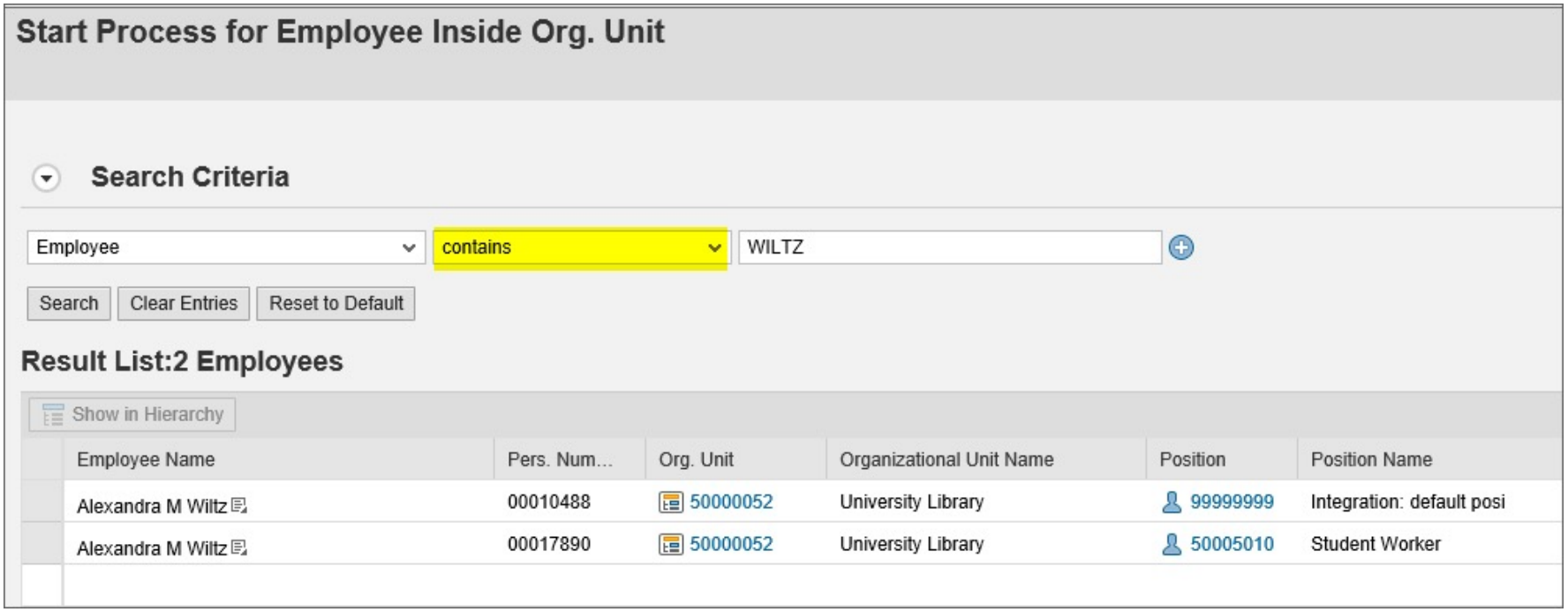
Employee is

Asterisk (*) - List all the employees

Person ID - Display specific employee

PERNR - Display specific employee

Start Process for Employee Inside Org. Unit



Employee contains:

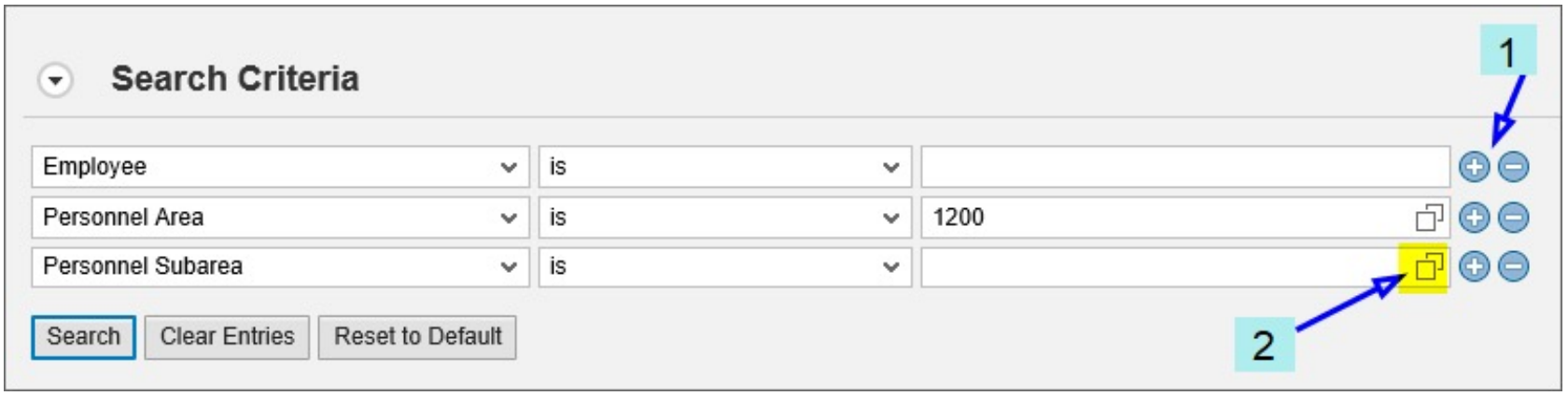
Name or Last name - Display all employees that match

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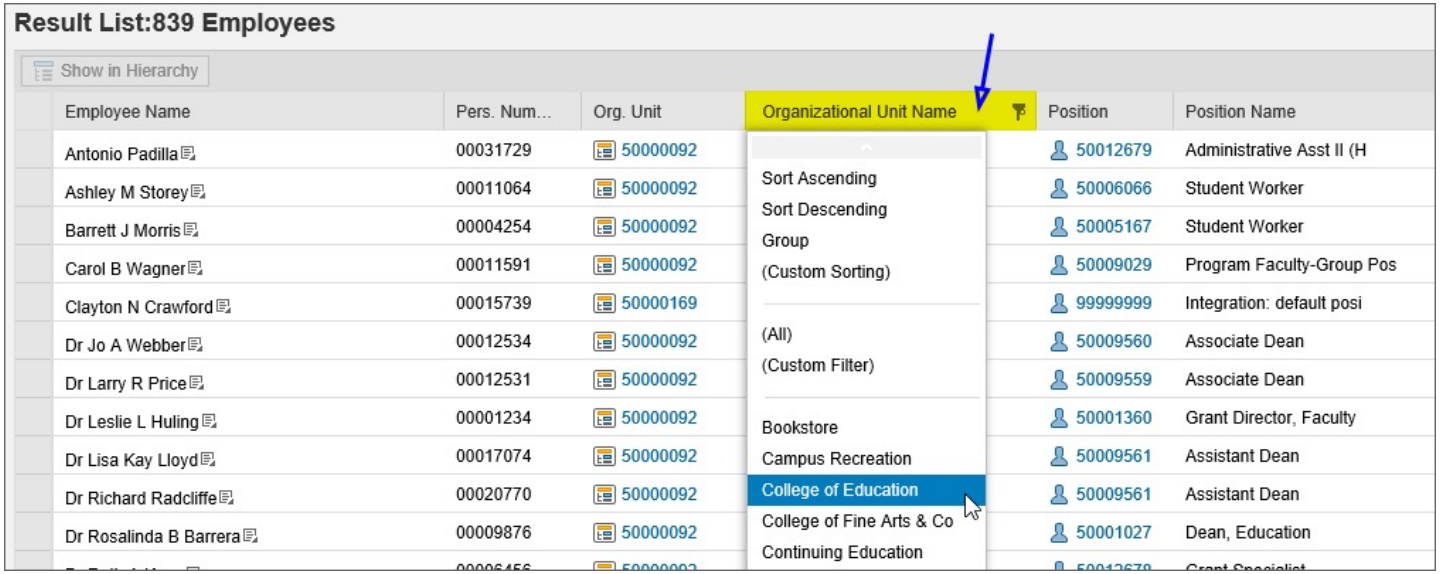
Start Process for Employee Inside Org. Unit

1 – The last column consists of a plus and/or minus button to delete rows or add new rows to facilitate searching.

2 – Search for values. Combine the criteria to meet your needs (***Is***, ***Is Not***, or ***Starts With).***



Filter, Sort and Group Search Results



Filters

- Click-on column header to setup a filter, sort or group.
- Select an item to filter.
- In order to select more than one item, use (Custom Filter). Instructions will be displayed on how to add more items

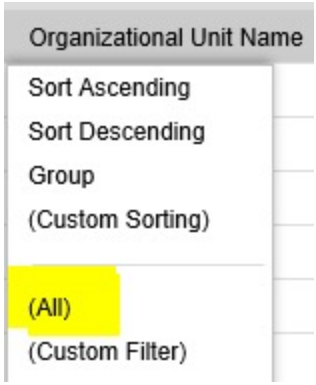
Result List - filtered by "College of Education"

Show in Hierarchy

Employee Name	Pers. Num...	Org. Unit	Organizational Unit Name	Position	Position Name
Antonio Padilla	00031729	50000092	College of Education	50012679	Administrative Asst II (H
Ashley M Storey	00011064	50000092	College of Education	50006066	Student Worker
Barrett J Morris	00004254	50000092	College of Education	50005167	Student Worker
Carol B Wagner	00011591	50000092	College of Education	50009029	Program Faculty-Group Pos
Dr Jo A Webber	00012534	50000092	College of Education	50009560	Associate Dean
Dr Larry R Price	00012531	50000092	College of Education	50009559	Associate Dean
Dr Leslie L Huling	00001234	50000092	College of Education	50001360	Grant Director, Faculty
Dr Lisa Kay Lloyd	00017074	50000092	College of Education	50009561	Assistant Dean
Dr Richard Radcliffe	00020770	50000092	College of Education	50009561	Assistant Dean

To Remove filter:

- Click-on column header
- Select: (All)

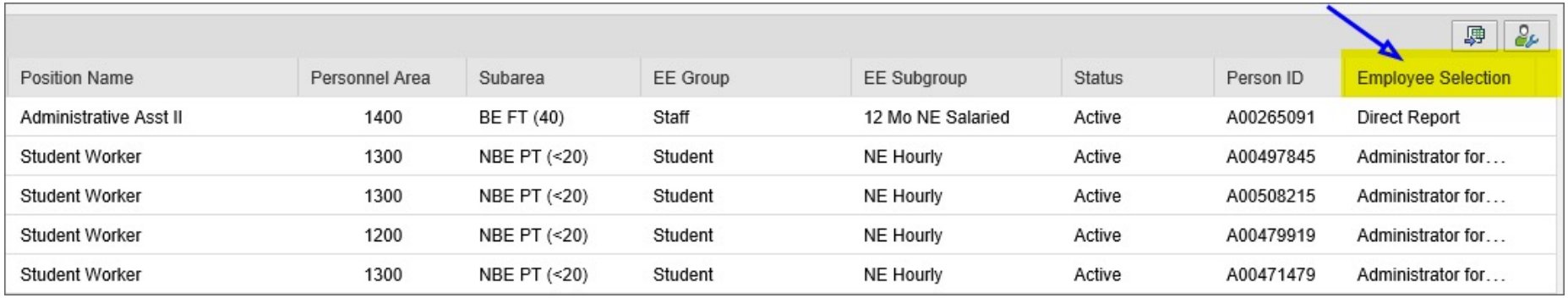


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Other Filter Options for Selection

Employee Selection

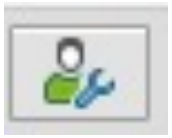
- Use filter to select:
  - *Direct Report*
  - *Administrator for Org. Unit*
- Use filter to select Organizational Unit
- Use filters in combination to narrow search results



Position Name	Personnel Area	Subarea	EE Group	EE Subgroup	Status	Person ID	Employee Selection
Administrative Asst II	1400	BE FT (40)	Staff	12 Mo NE Salaried	Active	A00265091	Direct Report
Student Worker	1300	NBE PT (<20)	Student	NE Hourly	Active	A00497845	Administrator for…
Student Worker	1300	NBE PT (<20)	Student	NE Hourly	Active	A00508215	Administrator for…
Student Worker	1200	NBE PT (<20)	Student	NE Hourly	Active	A00479919	Administrator for…
Student Worker	1300	NBE PT (<20)	Student	NE Hourly	Active	A00471479	Administrator for…

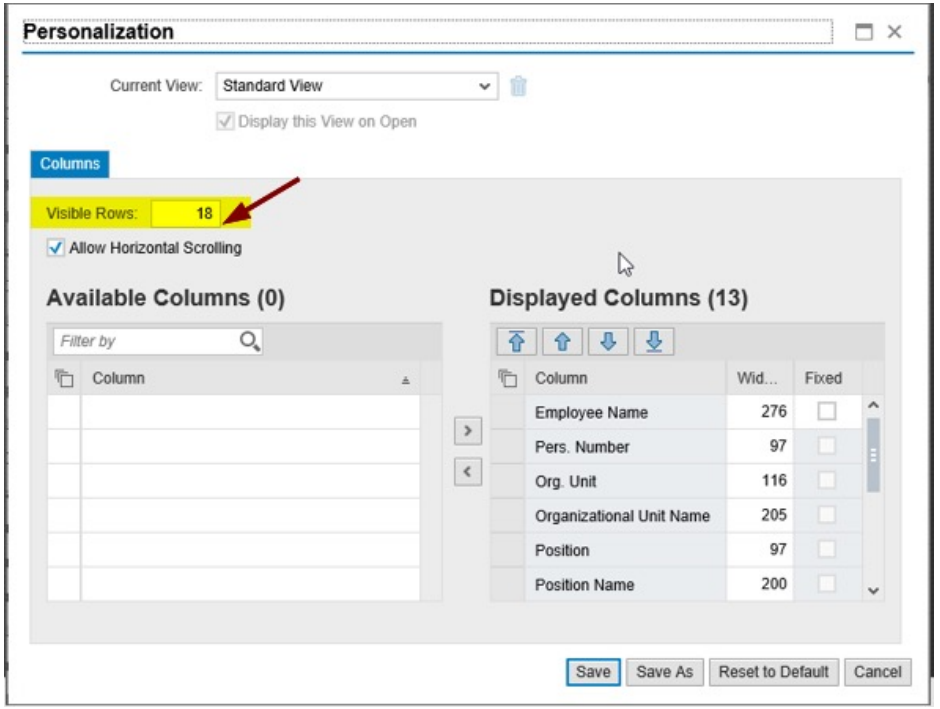
Option to Personalize Results

To the far right on the results grid, find and click the following icon to personalize the grid view:



Increase or decrease the number of rows displayed in the search results grid.

Using the arrows, add or remove columns displayed in the search results grid.



Result List – Miscellaneous Features

- Drag and Drop the columns in your result grid to arrange the columns as desired

- To the far right on the results grid find this icon to click and export to Excel 

- Popup Box appears at bottom of page: Click Save

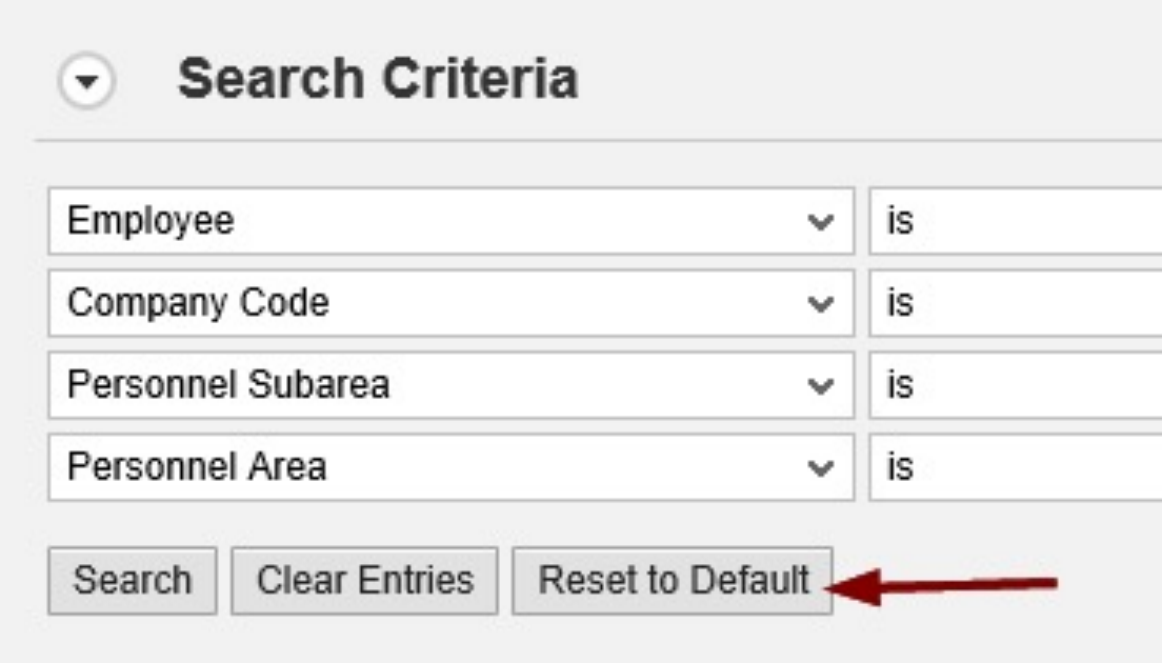


- Click Open to view the spreadsheet.



Start New Search

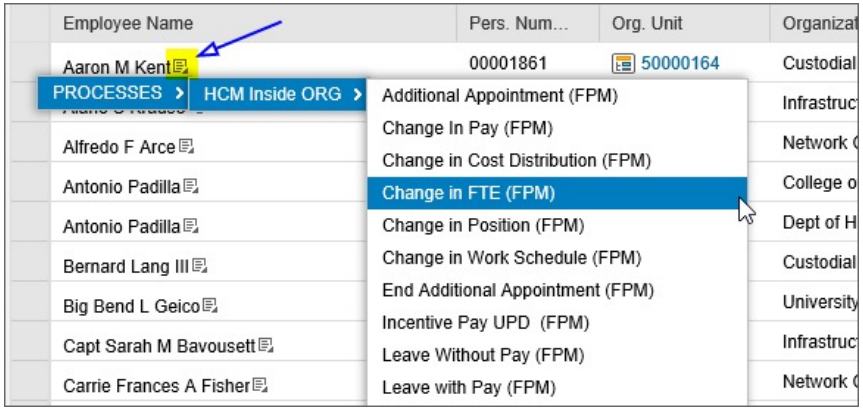
Click the "*Reset to Default*" button to remove results and start a new search.



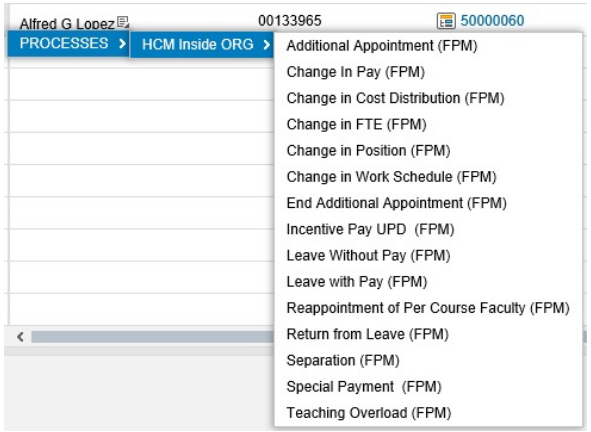
Select Employee and Start PCR

To start a PCR:

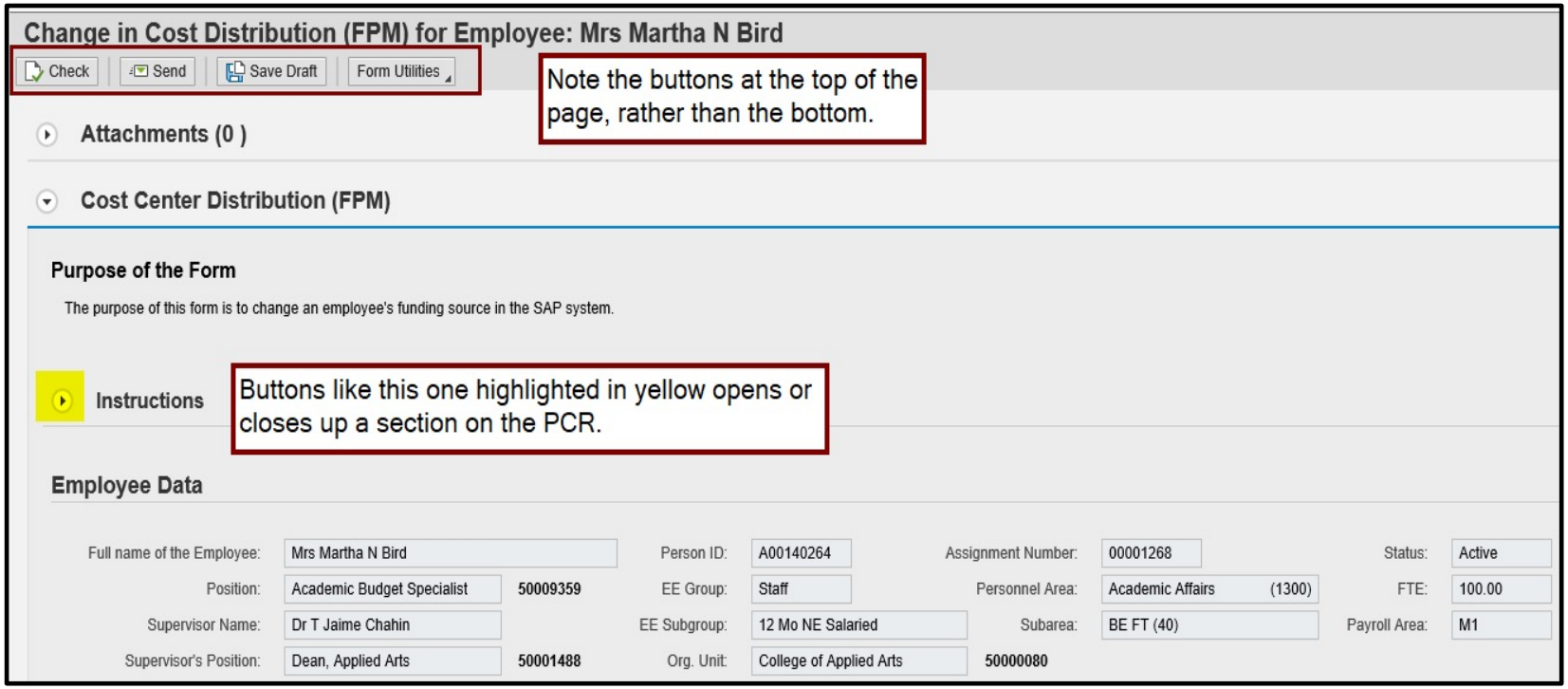
- Select employee
- Click-on icon next to name
- Select *Processes*
- Select *HCM* Inside *ORG*
- Select PCR (e.g. Change in FTE)





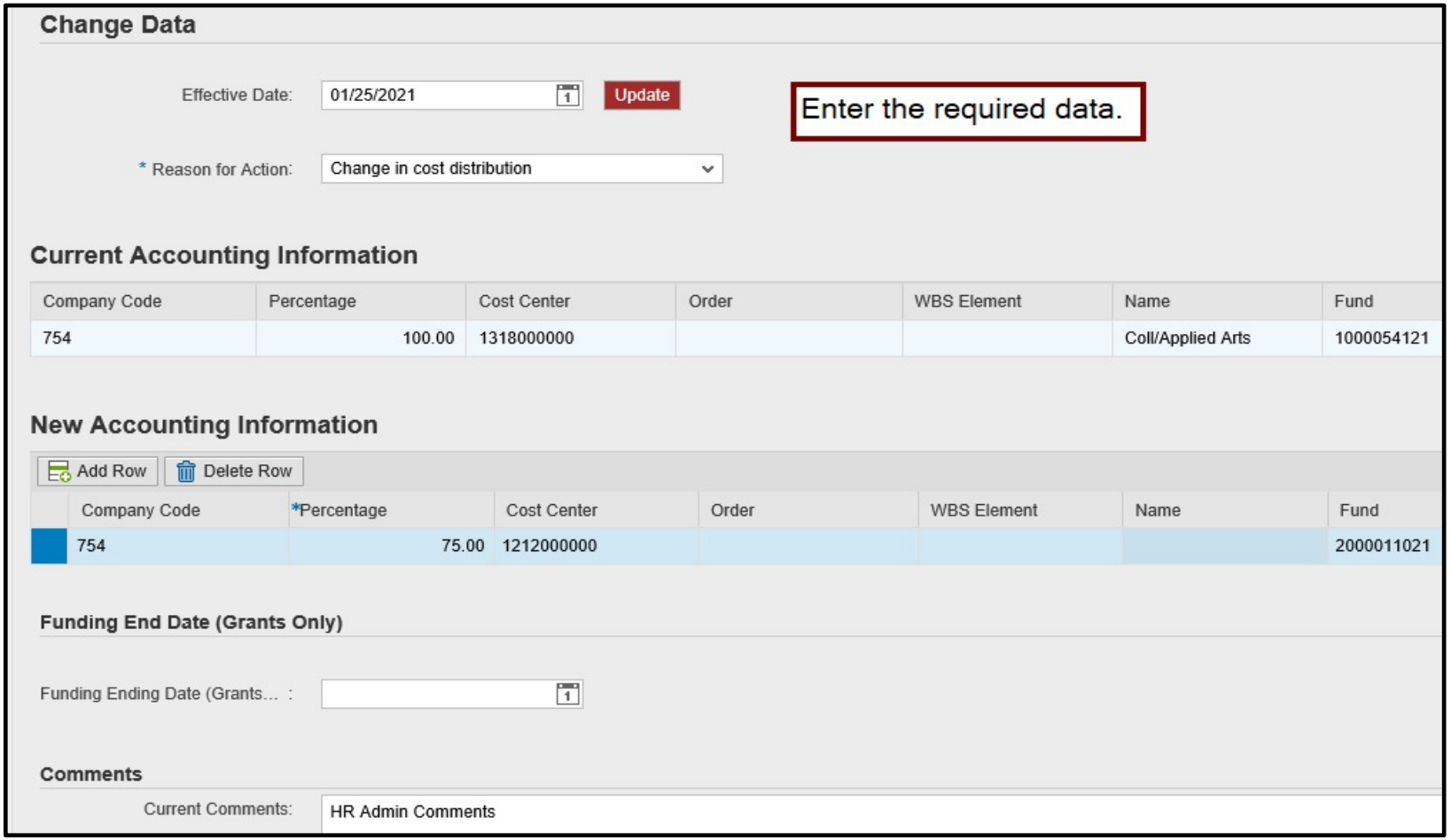


PCR Button Changes:

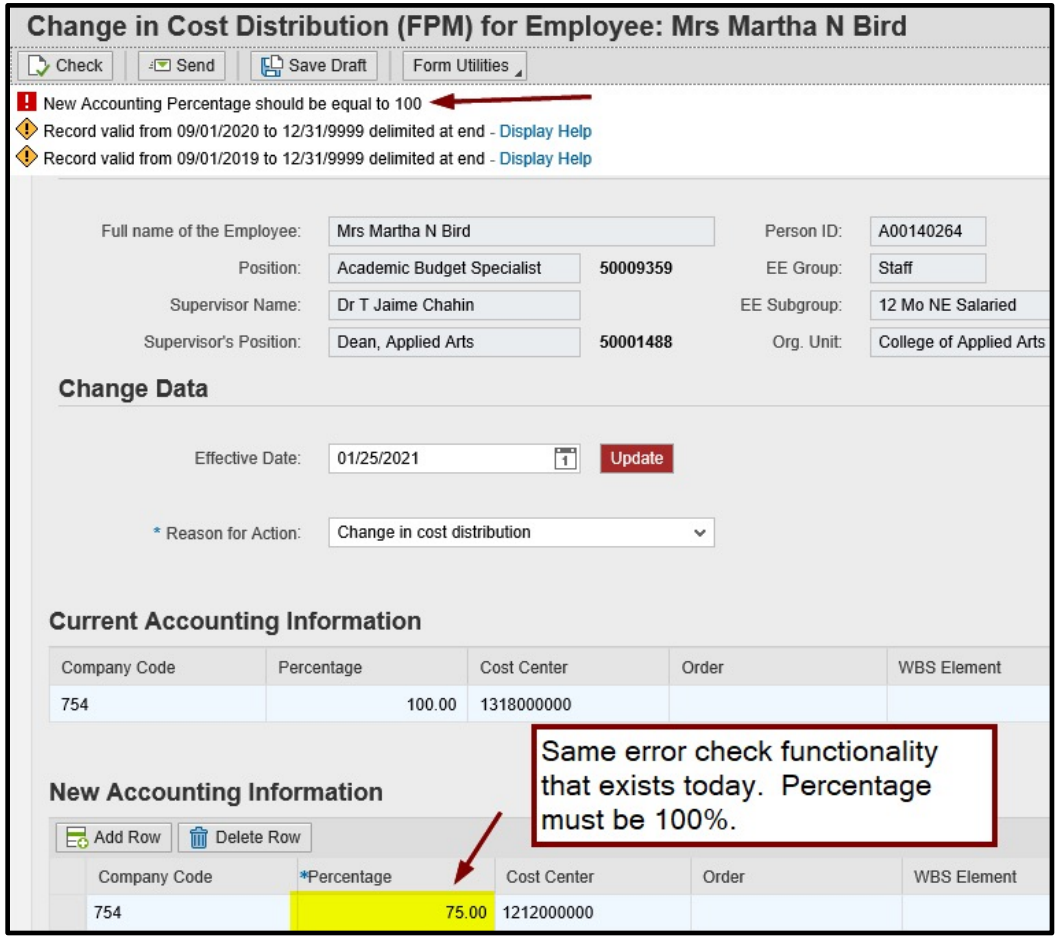


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Enter Data for PCR

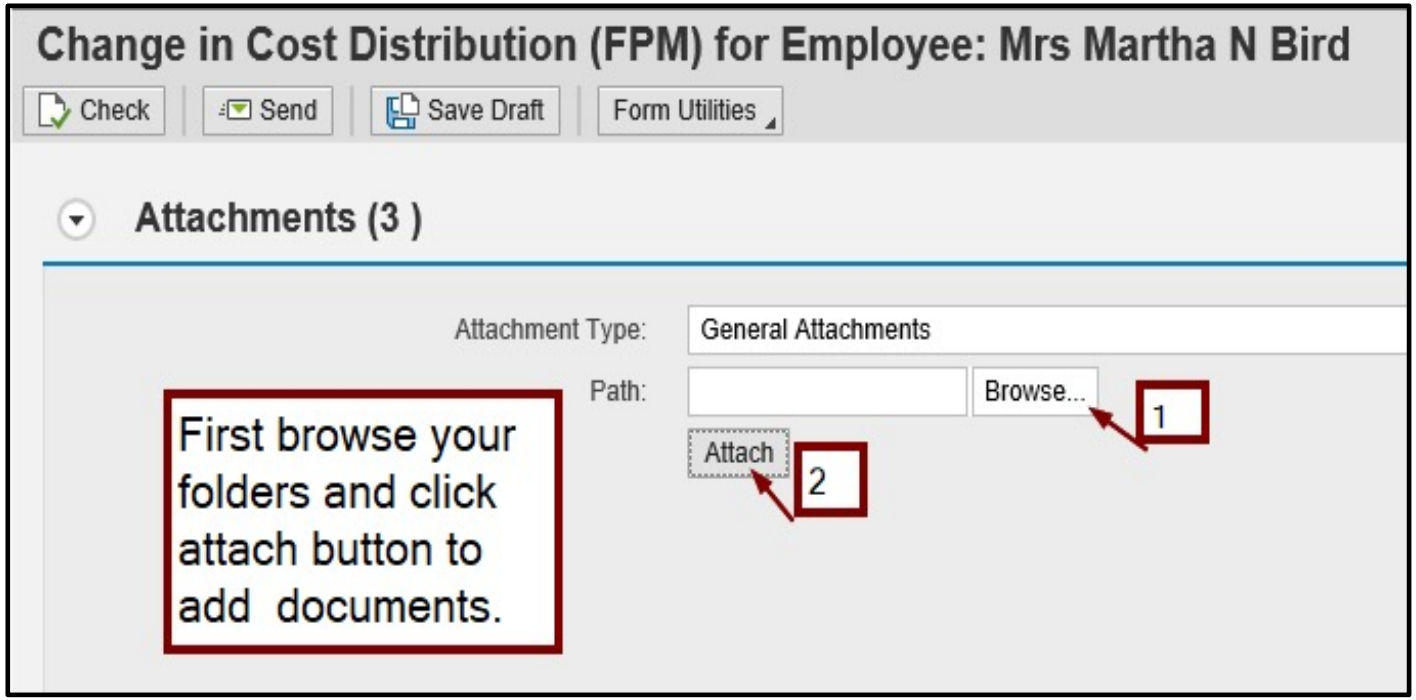


No Change in PCR Error Checks



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Add Attachments to PCR



Printing a PDF



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Change In Cost Distribution

Initiator: Ms Joyce L Munoz
Created Date: Jan 12, 2021
Created Time: 11:40:28 AM
Initiator Role:

Processing Status: Initiator
Process No:

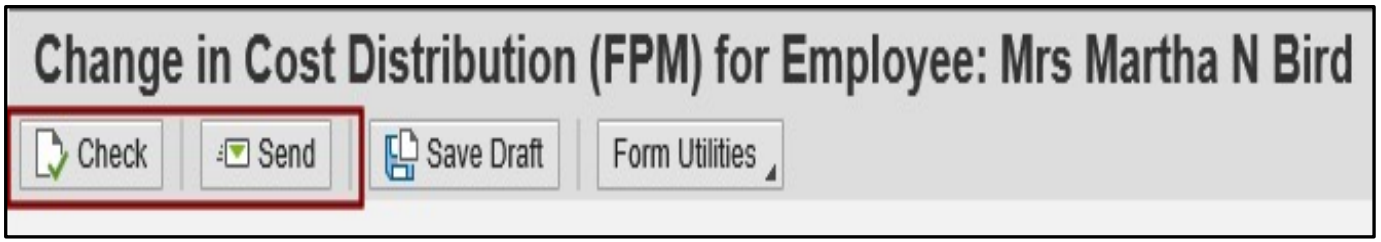
Employee:	Mrs Martha N Bird			**Person Id:**	A00140264	**Assign. No:**	00001268
EE Group:	Staff	**EE Subgroup:**	12 Mo NE Salaried	**Subarea:**	BE FT (40)	**Payroll Area:**	M1
Status:	Active	**Pers Area:**	Academic Affairs (1300)			**FTE:**	100.00
Organization:	College of Applied Arts		50000080	**Position:**	Academic Budget Specialist		50009359
Supervisor:	Dr T Jaime Chahin			**Sup. Pos.:**	Dean, Applied Arts		50001488

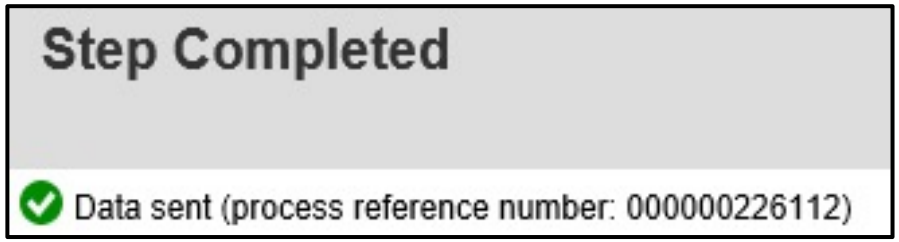
Change Data

Effective Date: Jan 25, 2021 **Reason for Action:** Change in cost distribution

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Check and Send PCR to Workflow

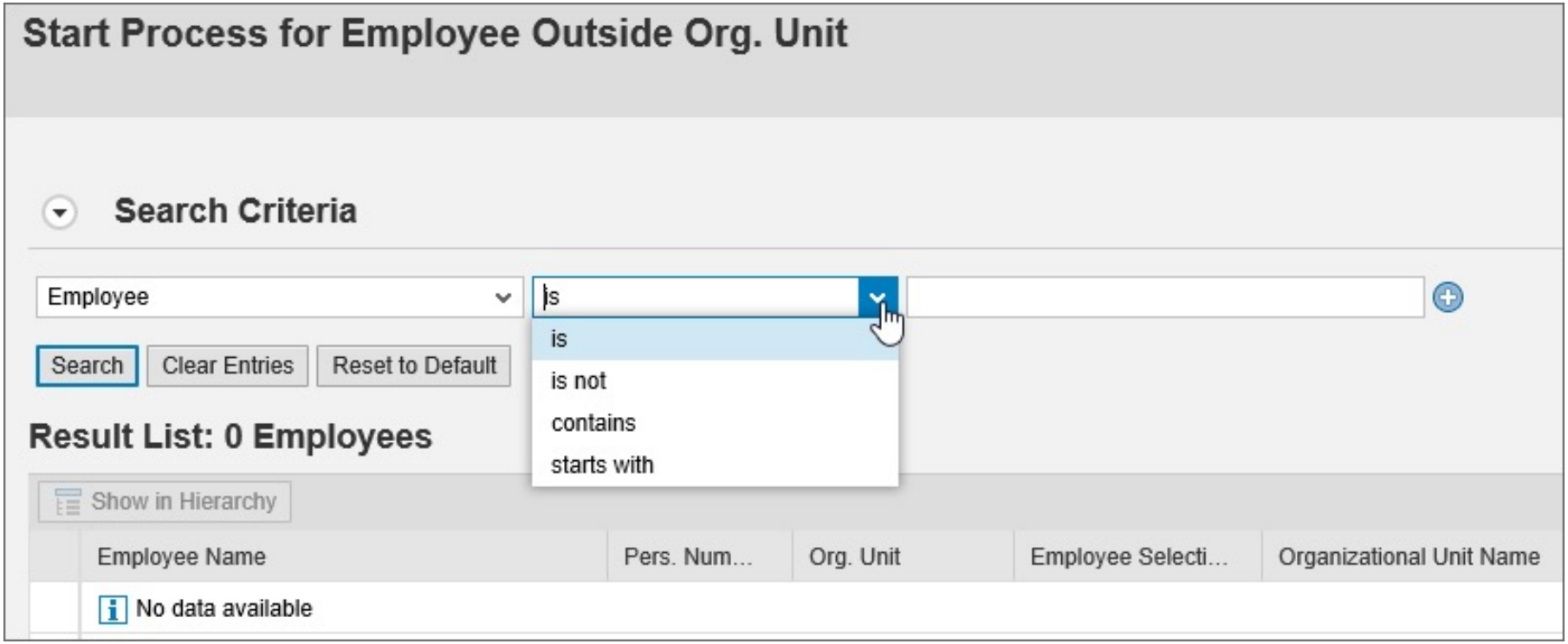




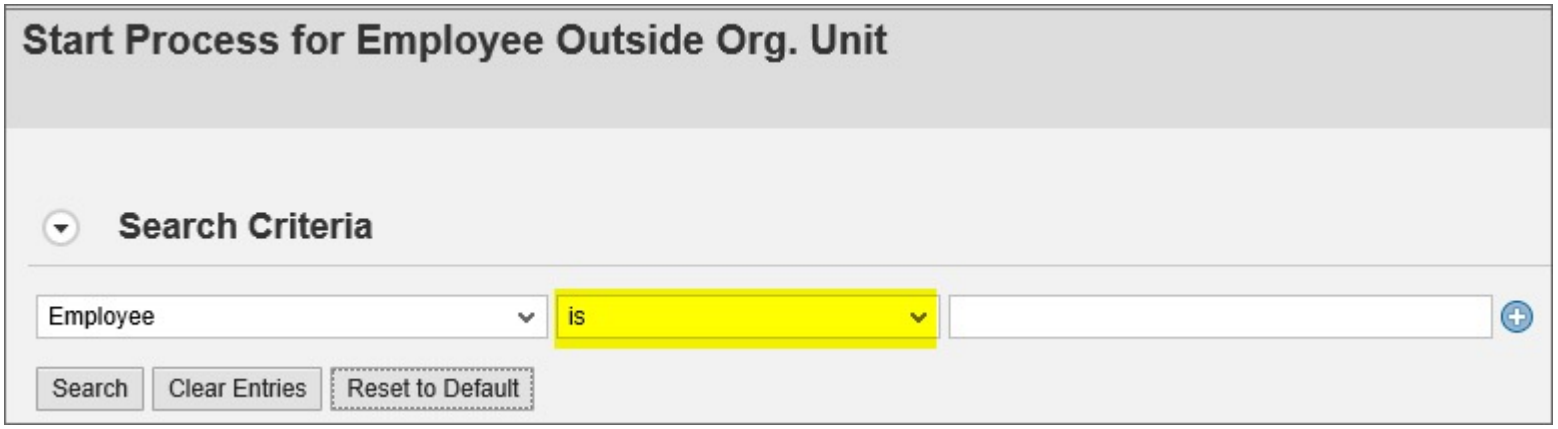
Employee Outside Org. Unit

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Start Process for Employee Outside Org. Unit



Start Process for Employee Outside Org. Unit



Employee is:

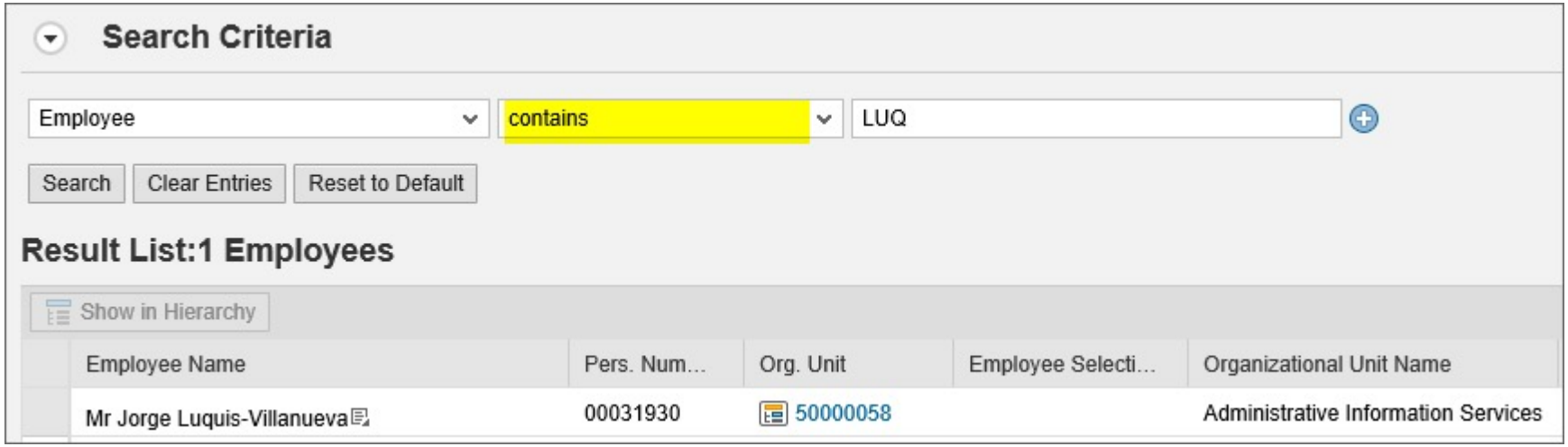
Asterisk (*) - Not Allowed

PERNR - Not Allowed

Valid values: Person ID, name or last name

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Start Process for Employee Outside Org. Unit



Employee contains

Valid values:

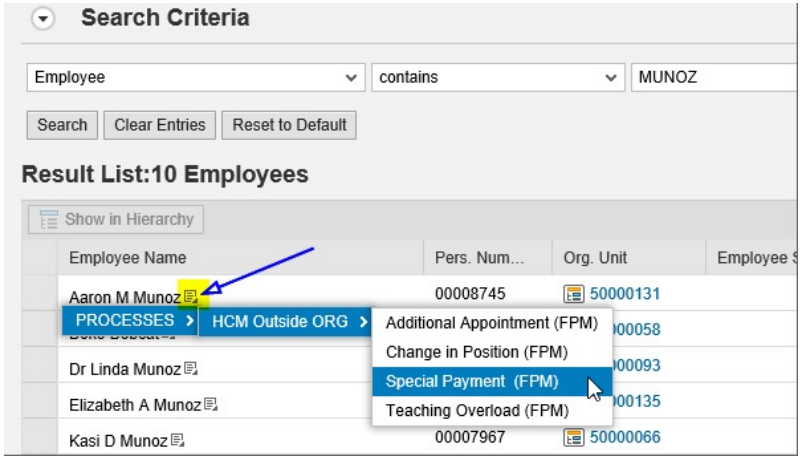
First Name, Last Name, or both

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Start Process for Employee Outside Org. Unit

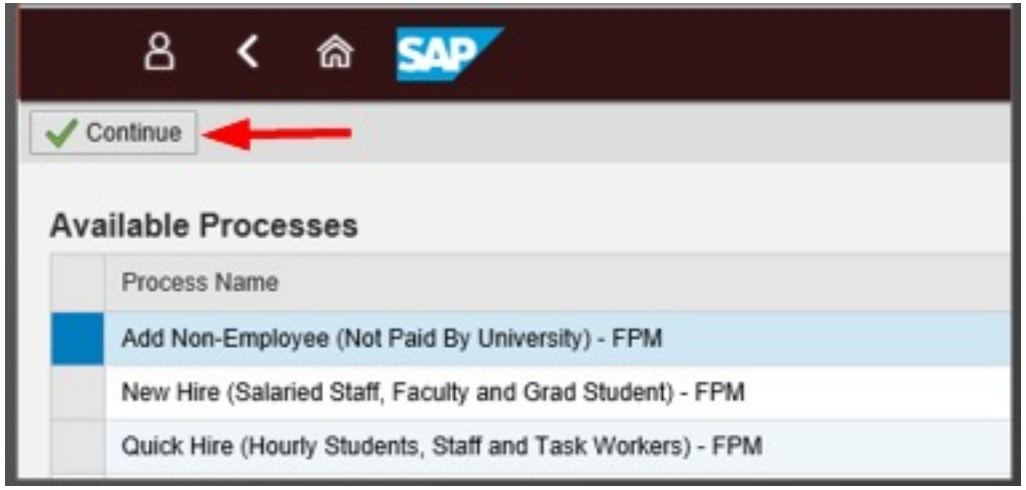
How to Start a Process:

- Select employee
- Click-on icon next to name
- Select Processes
- Select HCM Outside ORG
- Select Process

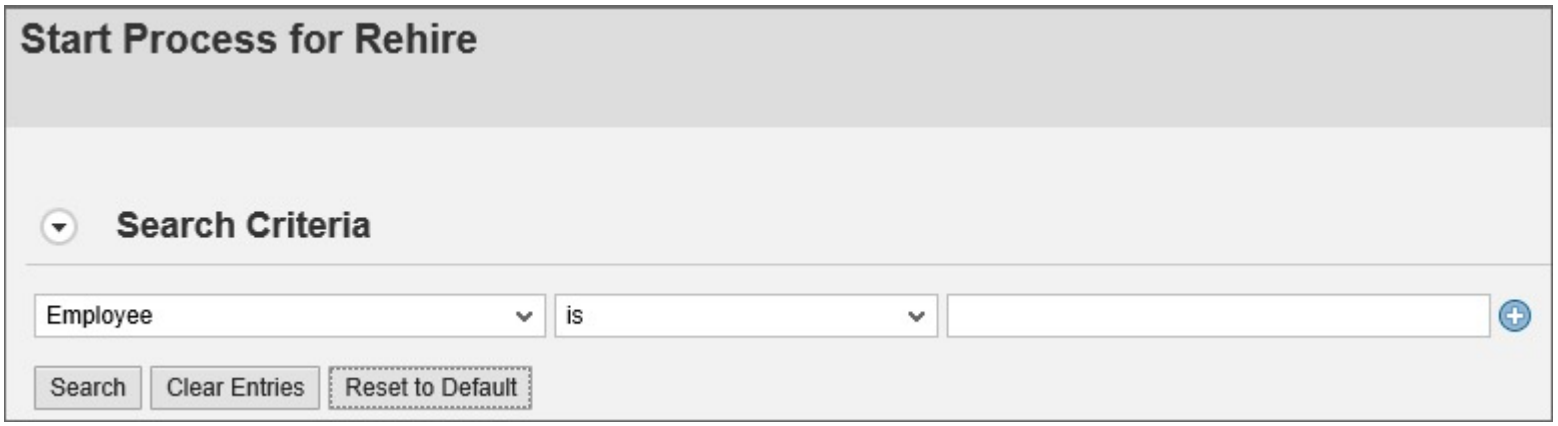


Hire Start Process

- Select a Process
- Click-on [Continue] button to start the process



Rehire Start Process



Employee is

Asterisk (*) - Not allowed

PERNR - Not allowed

Valid values:

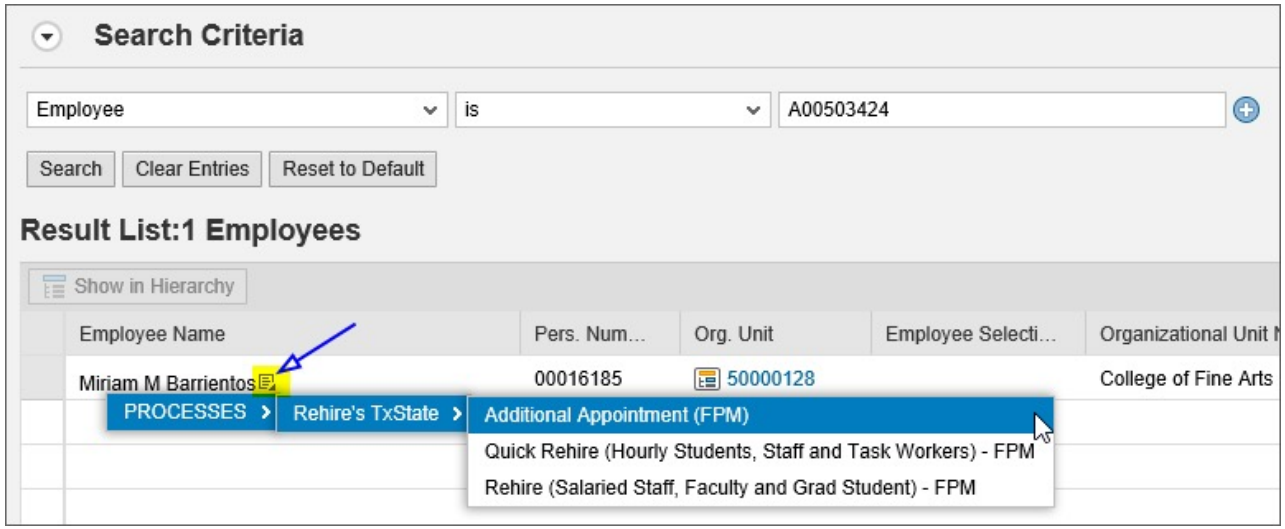
Person ID, name or last name

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Rehire

How to Start a Process:

- Select employee
- Click-on icon next to name
- Select Processes
- Select "*Rehire's TxState*"
- Select Process



Need Support?

- **ITAC**

  itac@txstate.edu

  livechat.itac.txstate.edu/

  5.4822

- **Human Resources - HRIS**

  HRISteam@txstate.edu

  5.2557

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