

PCR Initiation Guide



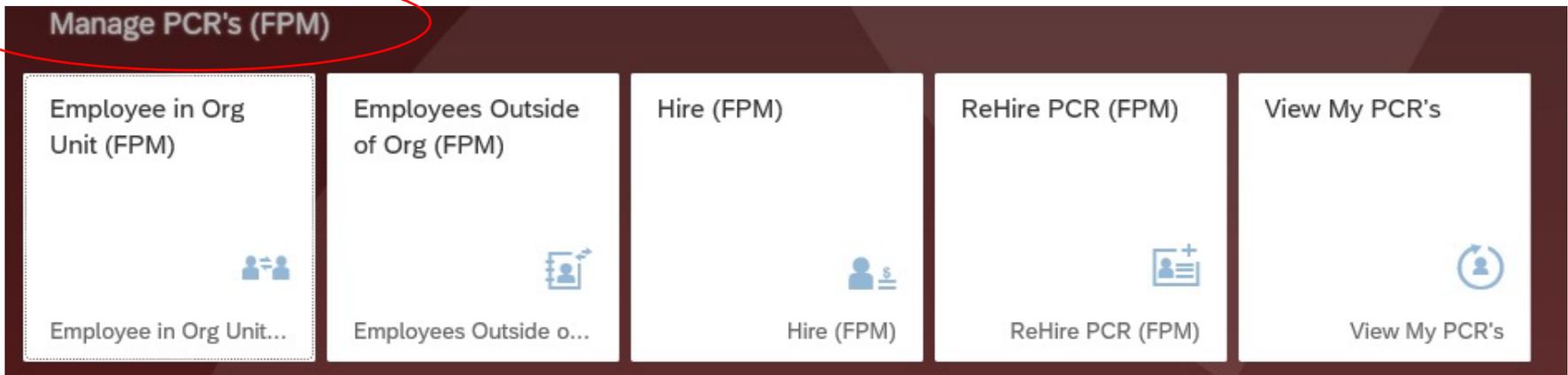
Rev. 4.2021

Key Benefits of PCR Migration

- Internet Explorer is no longer required. Most browsers support the new PCR process.
- Issues with Adobe are eliminated.
- Approvals can be actioned on a mobile device.

Getting Started

- Log in to the SAP portal from the Texas State homepage.
- Find the group called “Manager 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.

Start Process for Employee Inside Org. Unit

▼ Search Criteria

Employee ▼ is ▼ +

Search Clear Entries Reset to Default

Result List: 0 Employees

Show in Hierarchy

Employee Name	Pers. Number	Org. Unit	Organizational Unit Name	Position	Position Name
No data available					

Employees In Org Unit

- New search options are available to find your employee.

Start Process for Employee Inside Org. Unit

▼ **Search Criteria**

Employee ▼ | is ▼

Search Clear Entries Reset to Default

Result List: 0 Employees

Show in Hierarchy

Start Process for Employee Inside Org. Unit

Start Process for Employee Inside Org. Unit

▼ Search Criteria

Employee ▼ is ▼ +

Result List: 0 Employees

Employee is

- Asterisk (*)*** - List all the employees
- Person ID*** - Display specific employee
- PERNR*** - Display specific employee

Start Process for Employee Inside Org. Unit

Start Process for Employee Inside Org. Unit

Search Criteria

Employee contains WILTZ

Search Clear Entries Reset to Default

Result List:2 Employees

Show in Hierarchy

Employee Name	Pers. Num...	Org. Unit	Organizational Unit Name	Position	Position Name
Alexandra M Wiltz	00010488	50000052	University Library	99999999	Integration: default posi
Alexandra M Wiltz	00017890	50000052	University Library	50005010	Student Worker

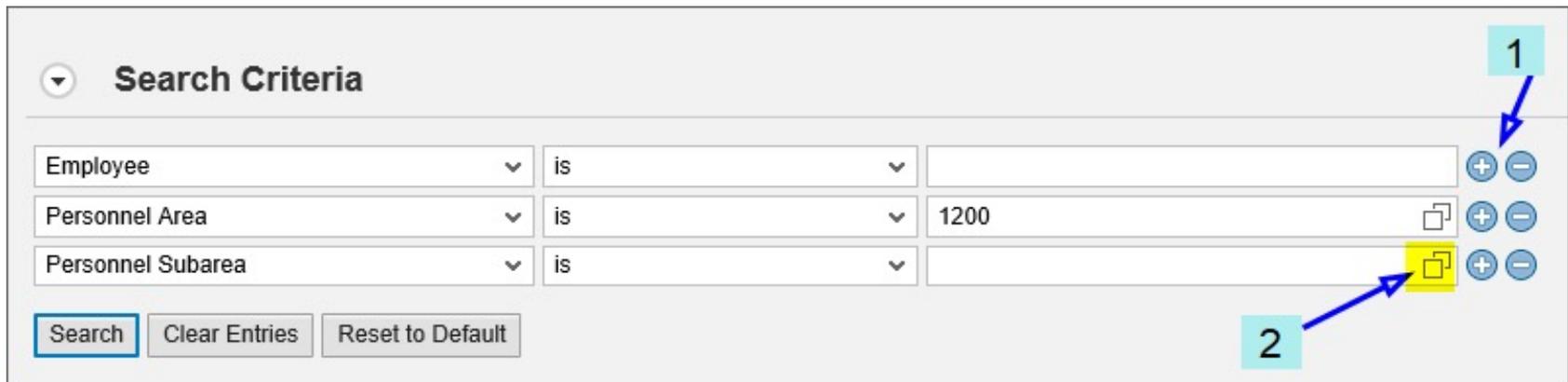
Employee contains:

Name or Last name - Display all employees that match

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*).



The screenshot shows a search criteria form with the following elements:

- Search Criteria** (dropdown menu)
- Three search rows:
 - Employee (dropdown) is (dropdown) [text input]
 - Personnel Area (dropdown) is (dropdown) 1200 [text input]
 - Personnel Subarea (dropdown) is (dropdown) [text input]
- Buttons: Search, Clear Entries, Reset to Default
- Annotations:
 - 1**: Points to the plus and minus buttons in the first row.
 - 2**: Points to the plus and minus buttons in the third row.

Filter, Sort and Group Search Results

Result List:839 Employees

Show in Hierarchy

Employee Name	Pers. Num...	Org. Unit	Organizational Unit Name	Position	Position Name
Antonio Padilla	00031729	50000092		50012679	Administrative Asst II (H)
Ashley M Storey	00011064	50000092		50006066	Student Worker
Barrett J Morris	00004254	50000092		50005167	Student Worker
Carol B Wagner	00011591	50000092		50009029	Program Faculty-Group Pos
Clayton N Crawford	00015739	50000169		99999999	Integration: default posi
Dr Jo A Webber	00012534	50000092		50009560	Associate Dean
Dr Larry R Price	00012531	50000092		50009559	Associate Dean
Dr Leslie L Huling	00001234	50000092		50001360	Grant Director, Faculty
Dr Lisa Kay Lloyd	00017074	50000092		50009561	Assistant Dean
Dr Richard Radcliffe	00020770	50000092		50009561	Assistant Dean
Dr Rosalinda B Barrera	00009876	50000092		50001027	Dean, Education

Organizational Unit Name dropdown menu:

- Sort Ascending
- Sort Descending
- Group
- (Custom Sorting)
- (All)
- (Custom Filter)
- Bookstore
- Campus Recreation
- College of Education
- College of Fine Arts & Co
- Continuing Education

Filters

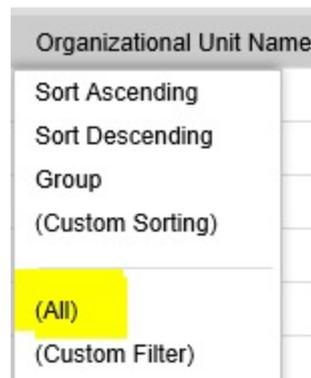
- Click-on column header to setup a filter, sort or group.
- Select an item to filter.
- In order to select more than one item, use (Custom Filter).
Instructions will be displayed on how to add more items

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:

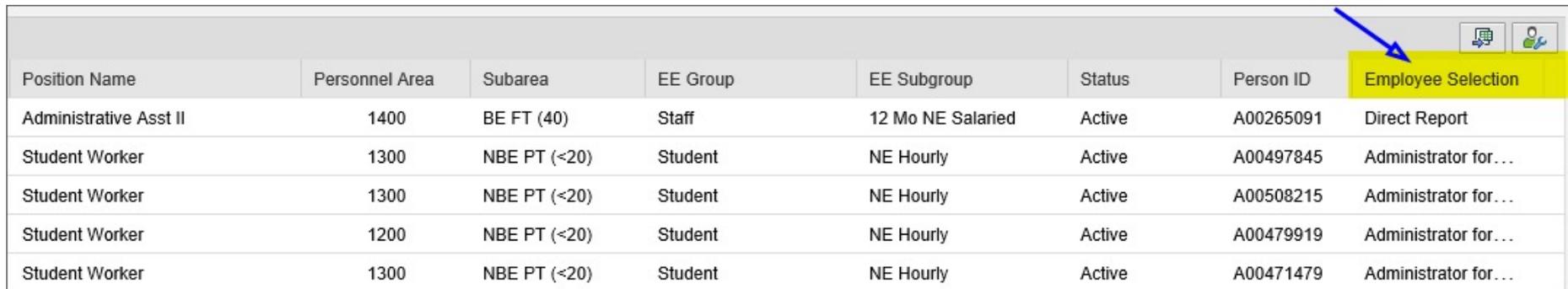
- Click-on column header
- Select: (All)



Other Filter Options for Selection

Employee Selection

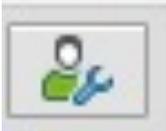
- Use filter to select:
 - *Direct Report*
 - *Administrator for Org. Unit*
- Use filter to select Organizational Unit
- Use filters in combination to narrow search results



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.

A screenshot of a 'Personalization' dialog box. At the top, it shows 'Current View: Standard View' and a checked box for 'Display this View on Open'. Below this is a 'Columns' section with a 'Visible Rows' field set to '18', highlighted in yellow with a red arrow pointing to it. There is also a checked box for 'Allow Horizontal Scrolling'. The dialog is split into two panes: 'Available Columns (0)' on the left and 'Displayed Columns (13)' on the right. The 'Displayed Columns' pane contains a table with columns for 'Column', 'Wid...', and 'Fixed'. The table lists: Employee Name (width 276, not fixed), Pers. Number (width 97, not fixed), Org. Unit (width 116, not fixed), Organizational Unit Name (width 205, not fixed), Position (width 97, not fixed), and Position Name (width 200, not fixed). At the bottom are buttons for 'Save', 'Save As', 'Reset to Default', and 'Cancel'.

Column	Wid...	Fixed
Employee Name	276	<input type="checkbox"/>
Pers. Number	97	<input type="checkbox"/>
Org. Unit	116	<input type="checkbox"/>
Organizational Unit Name	205	<input type="checkbox"/>
Position	97	<input type="checkbox"/>
Position Name	200	<input type="checkbox"/>

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

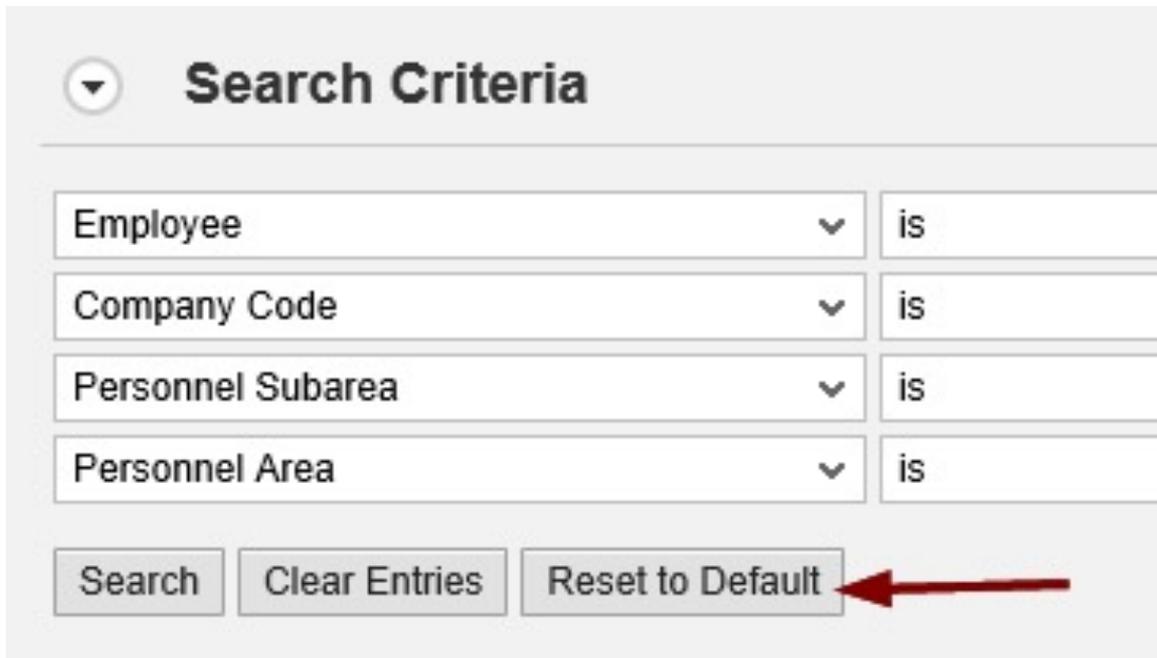


- Click Open to view the spreadsheet.



Start New Search

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



The screenshot shows a search criteria form with a title "Search Criteria" and a dropdown arrow. Below the title are four rows of search criteria, each with a dropdown menu and a relationship operator. At the bottom of the form are three buttons: "Search", "Clear Entries", and "Reset to Default". A red arrow points to the "Reset to Default" button.

Search Criteria	
Employee	is
Company Code	is
Personnel Subarea	is
Personnel Area	is

Search Clear Entries **Reset to Default**

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)

Employee Name	Pers. Num...	Org. Unit	Organiza
Aaron M Kent 	00001861	 50000164	Custodial
PROCESSES > HCM Inside ORG >			
Alfredo F Arce 			Infrastruc
Antonio Padilla 			Network C
Antonio Padilla 			College o
Antonio Padilla 			Dept of H
Bernard Lang III 			Custodial
Big Bend L Geico 			University
Capt Sarah M Bavousett 			Infrastruc
Carrie Frances A Fisher 			Network C

Change in FTE (FPM)

Alfred G Lopez 

Alfred G Lopez 	00133965	 50000060
PROCESSES > HCM Inside ORG >		
		Additional Appointment (FPM)
		Change In Pay (FPM)
		Change in Cost Distribution (FPM)
		Change in FTE (FPM)
		Change in Position (FPM)
		Change in Work Schedule (FPM)
		End Additional Appointment (FPM)
		Incentive Pay UPD (FPM)
		Leave Without Pay (FPM)
		Leave with Pay (FPM)
		Reappointment of Per Course Faculty (FPM)
		Return from Leave (FPM)
		Separation (FPM)
		Special Payment (FPM)
		Teaching Overload (FPM)

PCR Button Changes:

Change in Cost Distribution (FPM) for Employee: Mrs Martha N Bird

Check Send Save Draft Form Utilities

Attachments (0)

Cost Center Distribution (FPM)

Purpose of the Form
The purpose of this form is to change an employee's funding source in the SAP system.

Instructions Buttons like this one highlighted in yellow opens or closes up a section on the PCR.

Employee Data

Full name of the Employee:	Mrs Martha N Bird	Person ID:	A00140264	Assignment Number:	00001268	Status:	Active
Position:	Academic Budget Specialist 50009359	EE Group:	Staff	Personnel Area:	Academic Affairs (1300)	FTE:	100.00
Supervisor Name:	Dr T Jaime Chahin	EE Subgroup:	12 Mo NE Salaried	Subarea:	BE FT (40)	Payroll Area:	M1
Supervisor's Position:	Dean, Applied Arts 50001488	Org. Unit:	College of Applied Arts	50000080			

Enter Data for PCR

Change Data

Effective Date: 

* Reason for Action:

Enter the required data.

Current Accounting Information

Company Code	Percentage	Cost Center	Order	WBS Element	Name	Fund
754	100.00	1318000000			Coll/Applied Arts	1000054121

New Accounting Information

Company Code	*Percentage	Cost Center	Order	WBS Element	Name	Fund
754	75.00	1212000000				2000011021

Funding End Date (Grants Only)

Funding Ending Date (Grants... : 

Comments

Current Comments:

No Change in PCR Error Checks

Change in Cost Distribution (FPM) for Employee: Mrs Martha N Bird

Check Send Save Draft Form Utilities

! New Accounting Percentage should be equal to 100

! Record valid from 09/01/2020 to 12/31/9999 delimited at end - [Display Help](#)

! Record valid from 09/01/2019 to 12/31/9999 delimited at end - [Display Help](#)

Full name of the Employee: Mrs Martha N Bird Person ID: A00140264

Position: Academic Budget Specialist 50009359 EE Group: Staff

Supervisor Name: Dr T Jaime Chahin EE Subgroup: 12 Mo NE Salaried

Supervisor's Position: Dean, Applied Arts 50001488 Org. Unit: College of Applied Arts

Change Data

Effective Date: 01/25/2021 **1** Update

* Reason for Action: Change in cost distribution

Current Accounting Information

Company Code	Percentage	Cost Center	Order	WBS Element
754	100.00	1318000000		

New Accounting Information

Add Row Delete Row

Company Code	*Percentage	Cost Center	Order	WBS Element
754	75.00	1212000000		

Same error check functionality that exists today. Percentage must be 100%.

Add Attachments to PCR

Change in Cost Distribution (FPM) for Employee: Mrs Martha N Bird

Check Send Save Draft Form Utilities

Attachments (3)

Attachment Type: General Attachments

Path: Browse... **1**

Attach **2**

First browse your folders and click attach button to add documents.

Printing a PDF

Change in Cost Distribution (FPM) for Employee: Mrs Martha N Bird

Check Send Save Draft Form Utilities **Generate PDF**

Click the "Form Utilities" button to view 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

Check and Send PCR to Workflow

Change in Cost Distribution (FPM) for Employee: Mrs Martha N Bird

 Check

 Send

 Save Draft

Form Utilities 

Step Completed

 Data sent (process reference number: 000000226112)

Screen Captures for Employee Outside Org. Unit

Start Process for Employee Outside Org. Unit

Start Process for Employee Outside Org. Unit

▼ **Search Criteria**

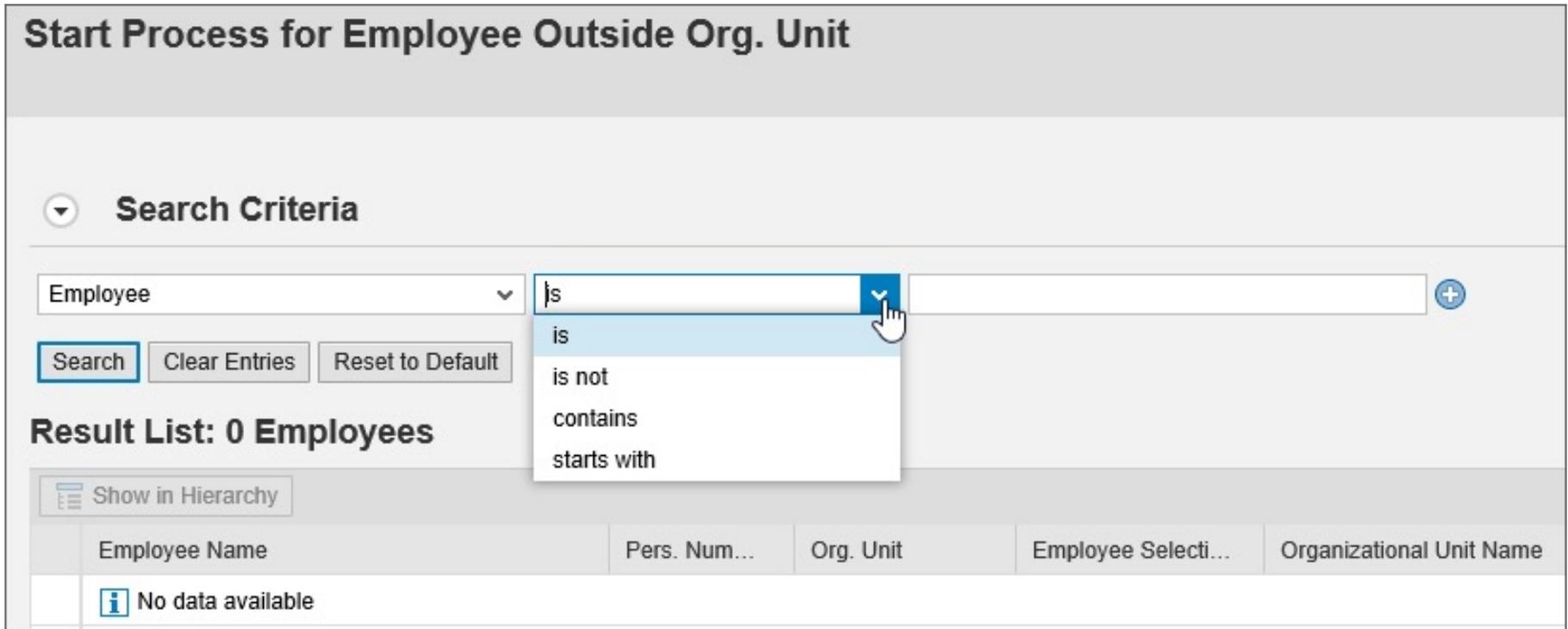
Employee ▼ | is | +

Search Clear Entries Reset to Default

Result List: 0 Employees

Show in Hierarchy

Employee Name	Pers. Num...	Org. Unit	Employee Selecti...	Organizational Unit Name
No data available				



Start Process for Employee Outside Org. Unit

Start Process for Employee Outside Org. Unit

▼ Search Criteria

Employee ▼ is ▼

Search Clear Entries Reset to Default

Employee is:

Asterisk (*) - Not Allowed

PERNR - Not Allowed

Valid values: Person ID, name or last name

Start Process for Employee Outside Org. Unit

Search Criteria

Employee LUQ

Result List: 1 Employees

Employee Name	Pers. Num...	Org. Unit	Employee Selecti...	Organizational Unit Name
Mr Jorge Luquis-Villanueva 	00031930	 50000058		Administrative Information Services

Employee contains

Valid values:

Name, last name

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

Search Criteria

Employee contains MUNOZ

Search Clear Entries Reset to Default

Result List: 10 Employees

Show in Hierarchy

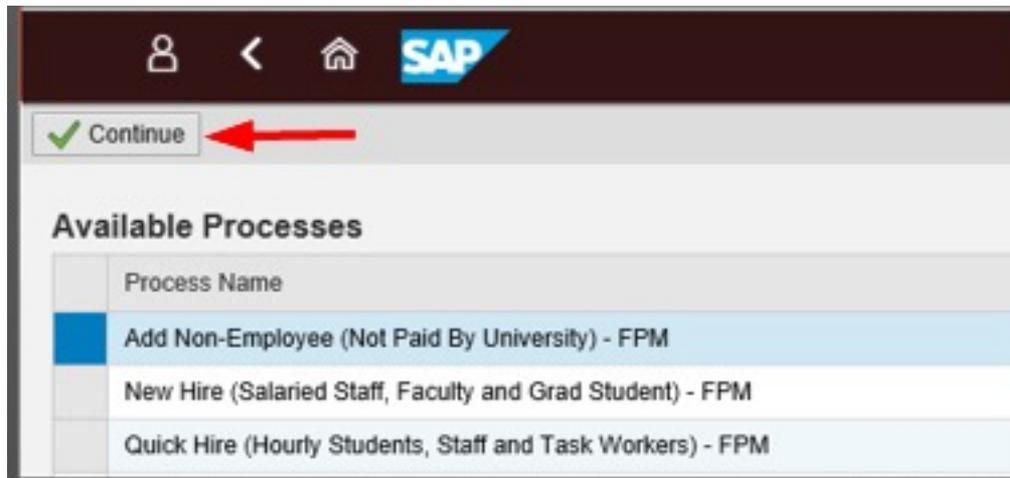
Employee Name	Pers. Num...	Org. Unit	Employee S
Aaron M Munoz	00008745	50000131	
Dr Linda Munoz			000058
Elizabeth A Munoz			000093
Kasi D Munoz	00007967	50000066	

Dropdown menu for Aaron M Munoz:

- PROCESSES >
- HCM Outside ORG >
- Additional Appointment (FPM)
- Change in Position (FPM)
- Special Payment (FPM)
- Teaching Overload (FPM)

Hire Start Process

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



Rehire Start Process

Start Process for Rehire

▼ **Search Criteria**

Employee ▼ is ▼ +

Employee is

Asterisk (*) - Not allowed

PERNR - Not allowed

Valid values:

Person ID, name or last name

Rehire

How to Start a Process:

- Select employee
- Click-on icon next to name
- Select Processes
- Select “*Rehire’s TxState*”
- Select Process

The screenshot displays a search interface with the following components:

- Search Criteria:** A search bar containing "Employee" (dropdown), "is" (operator), and "A00503424" (value). Buttons for "Search", "Clear Entries", and "Reset to Default" are present.
- Result List:** Titled "1 Employees". It includes a "Show in Hierarchy" button and a table with columns: Employee Name, Pers. Num..., Org. Unit, Employee Selecti..., and Organizational Unit.
- Table Data:**

Employee Name	Pers. Num...	Org. Unit	Employee Selecti...	Organizational Unit
Miriam M Barrientos	00016185	50000128		College of Fine Arts
- Dropdown Menu:** A context menu is open over the name "Miriam M Barrientos", showing a "PROCESSES" menu with sub-items: "Rehire's TxState" (expanded) and "Additional Appointment (FPM)". Other options include "Quick Rehire (Hourly Students, Staff and Task Workers) - FPM" and "Rehire (Salaried Staff, Faculty and Grad Student) - FPM".

Need Support?

- **ITAC**

itac@txstate.edu

livechat.itac.txstate.edu/

5.4822

- **Human Resources - Master Data Center**

[hrmdc@txstate.edu](mailto:hrmcdc@txstate.edu)

5.2557

- **Faculty Resources**

FacultyResources@txstate.edu

5.2786

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