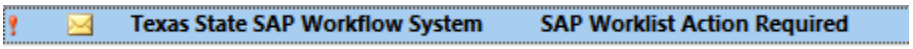
Electronic PCR Approval in the SAP Worklist

The **purpose** of the document is to assist in navigation of the Worklist and approving PCR's.

The electronic PCR process includes workflow and email notifications to alert approvers that a PCR needs their review. As an approver, an email will arrive in the Outlook Inbox from the Texas State SAP Workflow System with the subject line of SAP Worklist Action Required. See example of email item below.



The email is the trigger or alert to take action in the SAP Worklist.

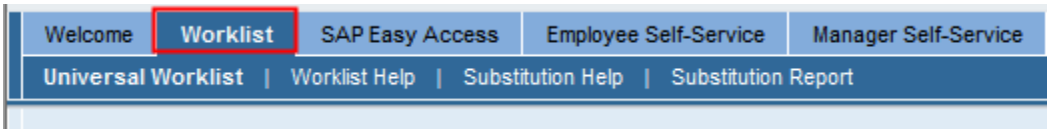
To Proceed:

- Logon to the SAP Portal

You can access the SAP Portal from the Texas State home page or by clicking on the link below.

https://ibis.sap.txstate.edu:50001/irj/portal

- Once in the portal there will be several tabs available, click on the Worklist tab.

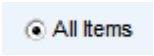


Note at the top of the Worklist the options available.

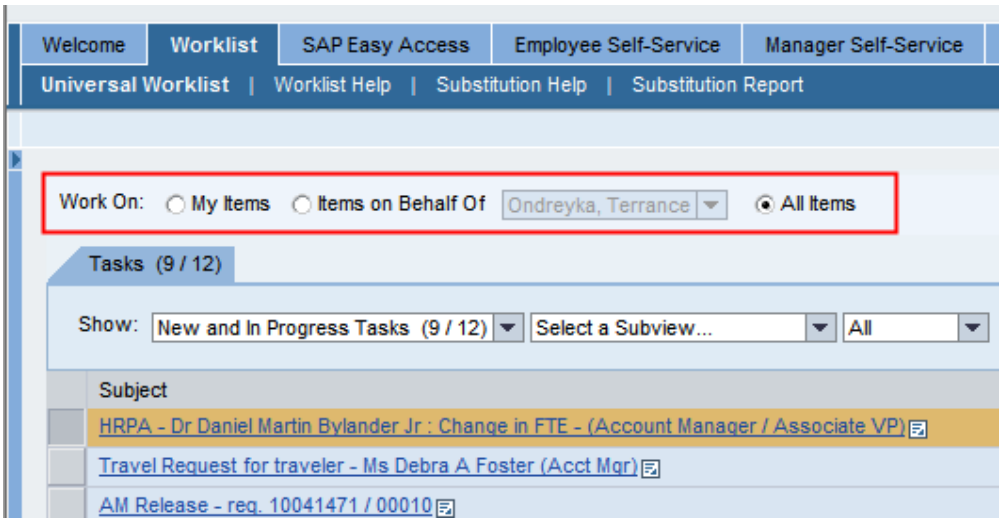
My Items includes all tasks directly assigned by the workflow

Items on Behalf Of includes tasks assigned due to the approvers status as a substitute

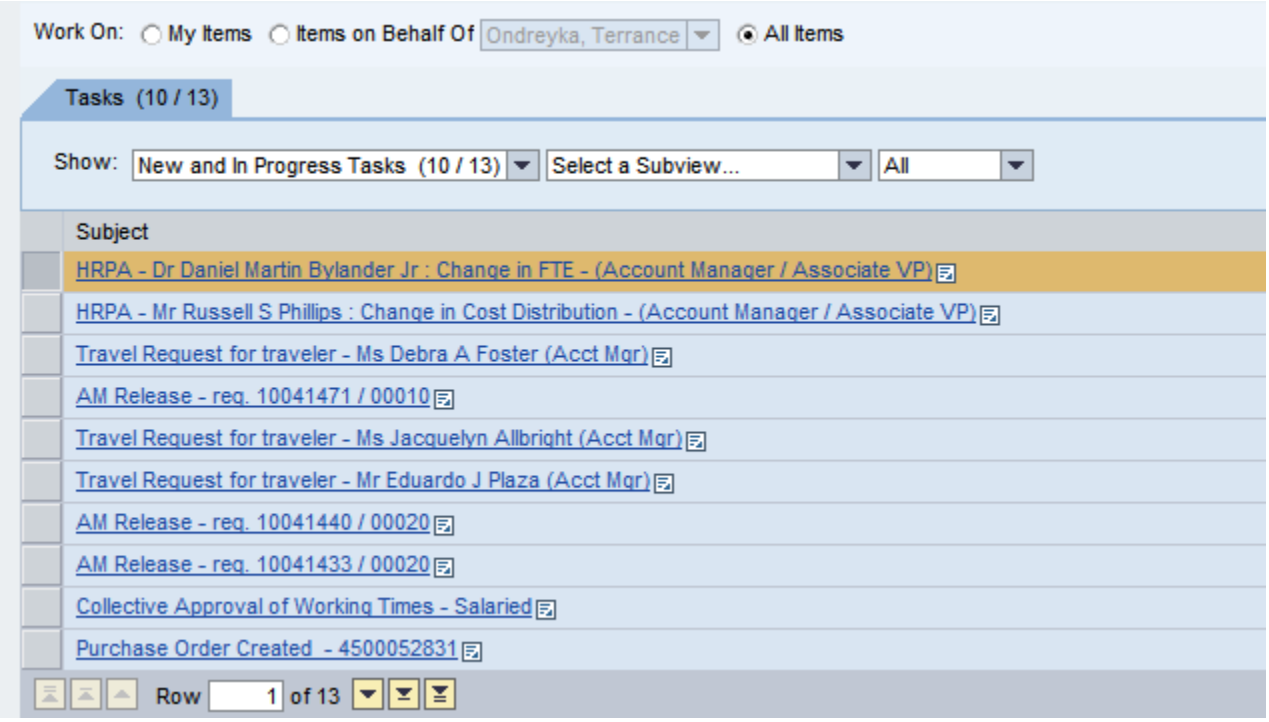
All Items includes those direct tasks and the substitution tasks

- Click the 

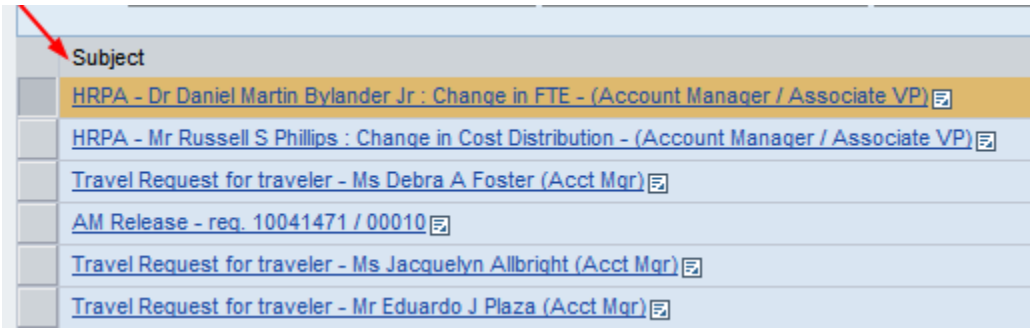
button.



The Worklist may contain items related to PCR's, Travel, Purchasing and Time approvals.

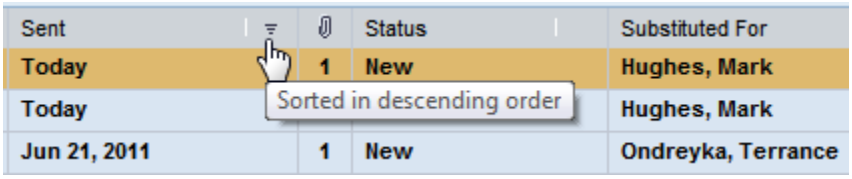


- Sort the tasks in your Worklist by clicking on “Subject” in the header row

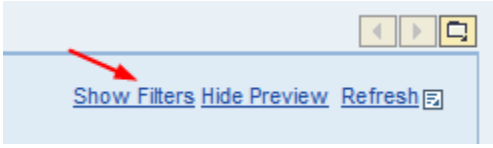


The tasks are sorted alphabetically.

It may be helpful to sort by “Sent” or by” Substituted For” as well.

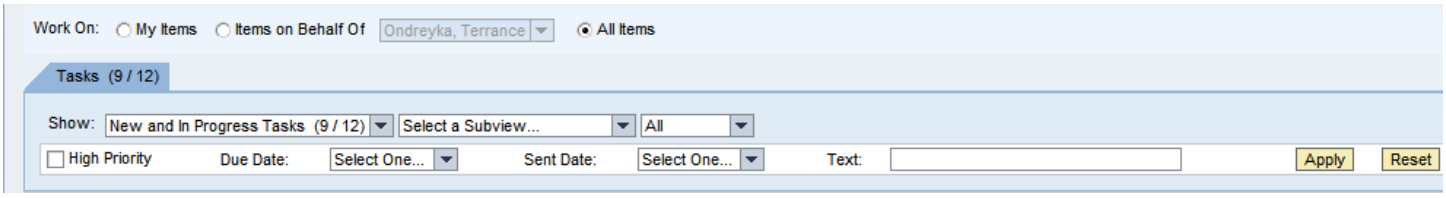


In addition to sort options, filters are also available.

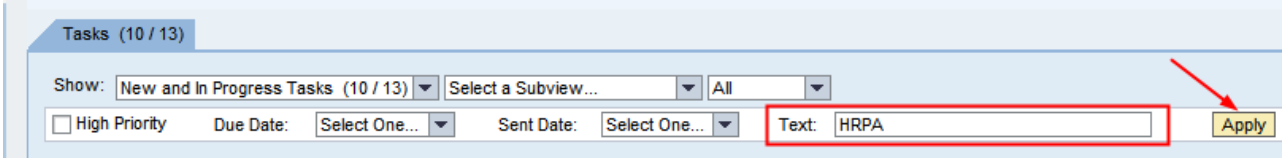


Click on “Show Filters”.

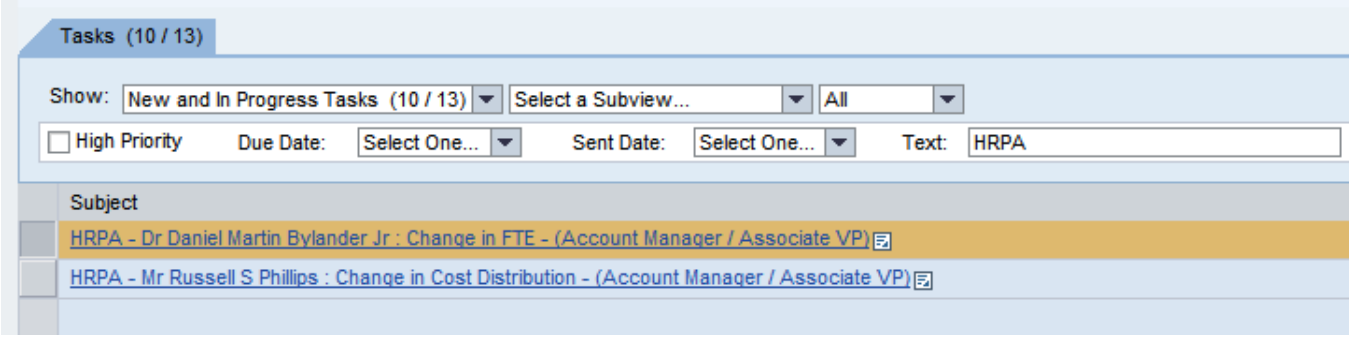
Filtering options are now available.



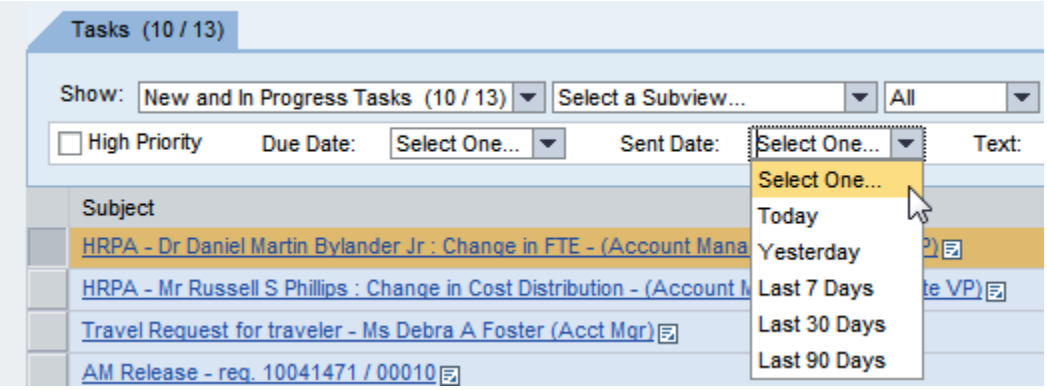
- In the text filter enter HRPA and click on the Apply button.

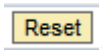


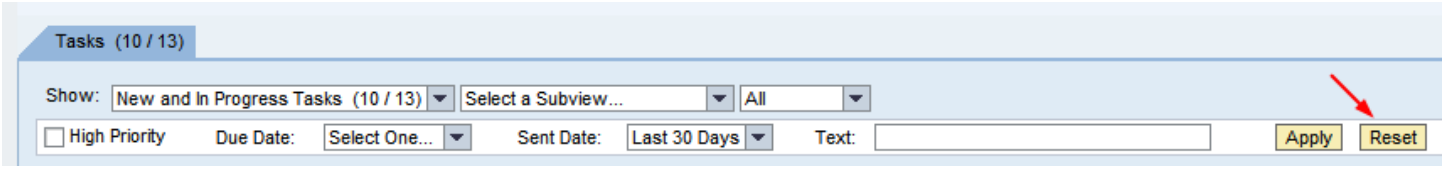
Due to the filter only PCR items that need approval are viewable.



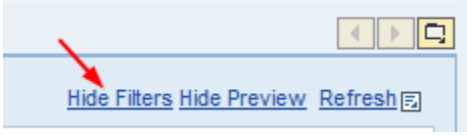
The “Sent Date” offers various filter options.



To refresh the filters, click the “Reset” button  .

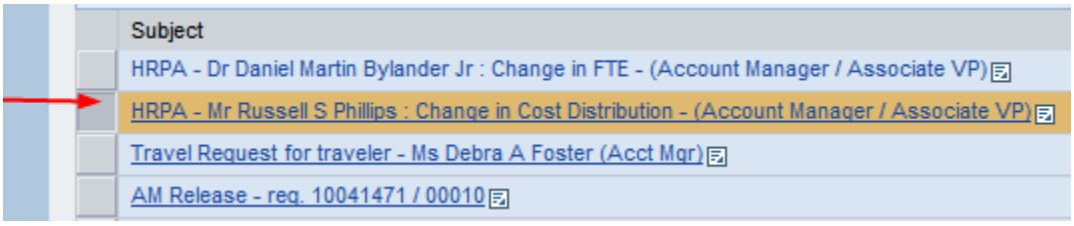


To eliminate the filters, click on “Hide Filters”.



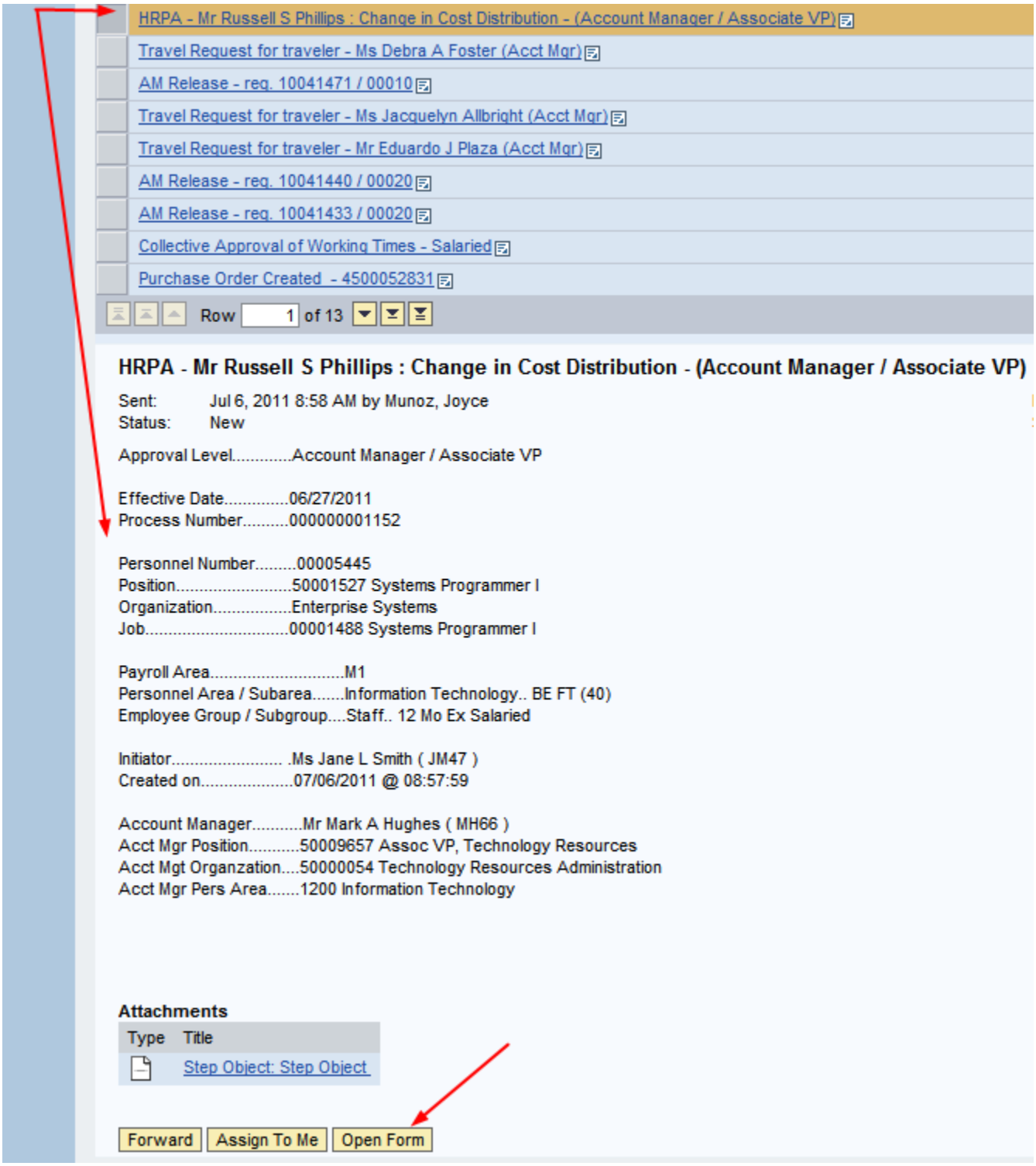
In the example below, we will approve a Change in Cost Distribution PCR.

Select/highlight the item in the Worklist to approve



The PCR task identifies the name of the employee and the type of PCR to approve.

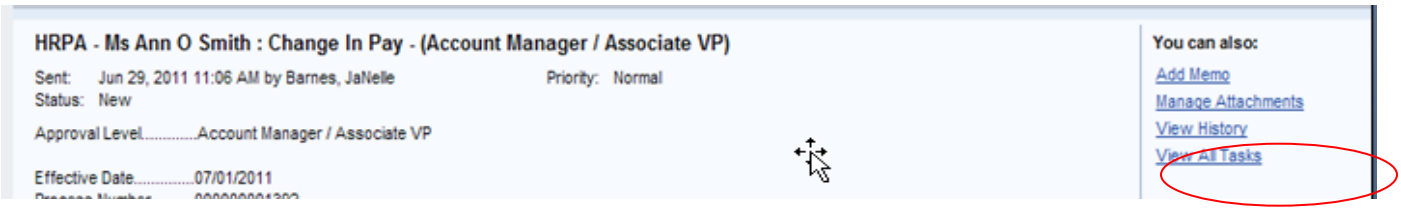
In the preview of the task, there are more details displayed about the PCR.



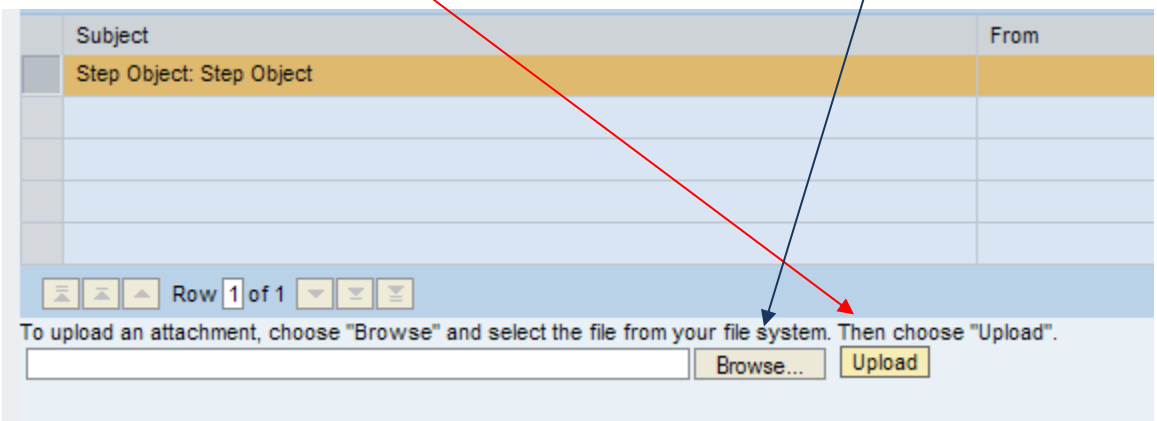
After preview, you may now open the form to approve the PCR OR you can complete the additional step necessary to attach support documents prior to the approval step.

- If ready to approve the PCR, click on the “Open Form” button

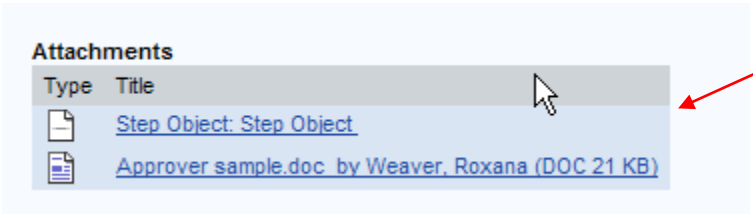
- To attach additional support documentation prior to approval, click on the “Manage Attachments” button



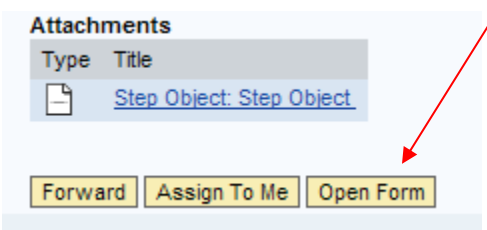
Once the screen below appears, upload an attachment by clicking on the “Browse” button and selecting the file from your file system. Click the “Upload” button.



The attachment is now stored in support of the PCR action. Review of the attachment or review of an attachment added by the PCR initiator or previous approver may be viewed by clicking on the designated attachment.



To now approve the PCR, click on the “Open Form” button



The PCR is opened in an Adobe form. At the top of the form, note the Effective Date and the Employee associated with the Change in Cost Distribution.

TEXAS STATE UNIVERSITY
SAN MARCOS
The rising STAR of Texas

Texas State University-San Marcos

Change in Cost Distribution

Effective Date	Jun 27, 2011	
Employee	Mr Russell S Phillips	472523
	Assignment Number	00005445
Organizational Assignment	Enterprise Systems	50012238
Position	Systems Programmer I	50001527

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

Instructions
1. Select the effective date of change and press the Update button. Changes cannot be made for the previous fiscal year.
2. Select the appropriate reason code from the drop down list.
3. Enter the account information. You can enter up to eight different accounts. The total percent column must equal to 100.
4. If grant funded, the Funding End Date field is required using the grant account that expires earliest. Date entered may be any date prior to the grant end date to reflect actual salary charged to the grant.
5. Complete the comments section documenting the need for the change.
6. Review for errors by selecting the Check and Send button.
7. If no errors, submit the form by selecting the Send button.

In the middle of the form, the current accounting information is displayed and beneath it the new accounting information that is applicable once the PCR is approved.

Current Accounting Information

Percent	Cost Center	Order	WBS Element	Name	Fund
100.00	1212130000			Enterprise Systems	2021001011

New Accounting Information

Percent	Cost Center	Order	WBS Element	Name	Fund
100.00	1212000000			Tech Resources Ad	2021001011

Check the comment section, the initiator of the PCR or a previous approver may have provided comments to help determine if the PCR should be approved or rejected.

As an approver enter comments if desired or needed for clarification of the process.

Comments

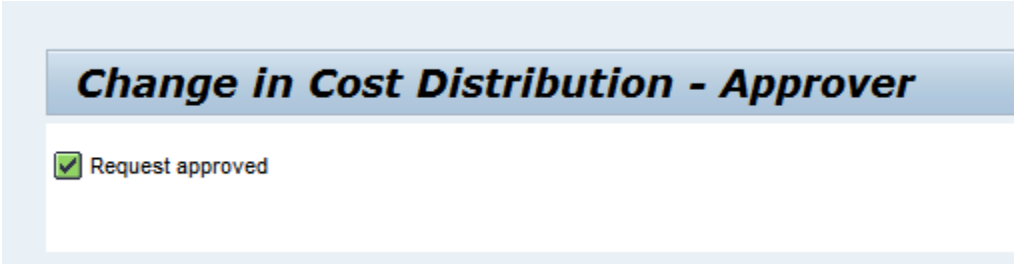
Joyce Munoz 07/06/2011 08:58:01
Change due to funding source availability.

Comments

As an approver there are two options, Approve or Reject. The Approve and Reject buttons are located at the bottom of the form right after the Comment section.

Click on Approve to approve the PCR.

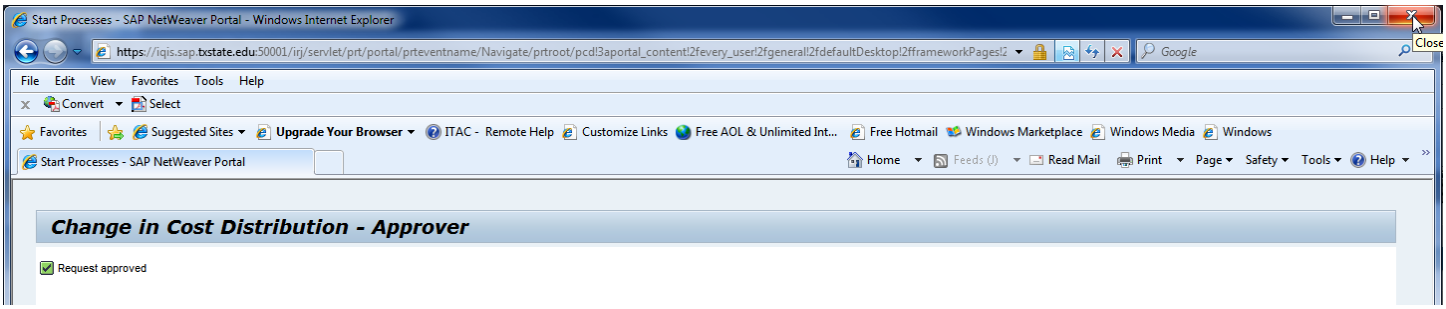
The following message will be displayed.



Click on Reject to reject the PCR.

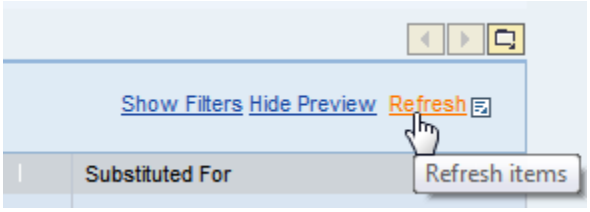
The E-PCR can be rejected at any level of approval. The COMMENTS section of the PCR should be completed to reflect the reason for the rejection. Once the PCR has been rejected, the PCR initiator and approvers within the electronic flow will receive notification of the rejection. The rejected PCR is returned to the PCR initiator's worklist. The initiator now has the ability to correct and resubmit the original PCR. The PCR will once again follow the established electronic approval flow. Exceptions: Rejection due to incorrect PCR form and use of an incorrect position number on the Additional Appointment form.

Click on the  to close the window.

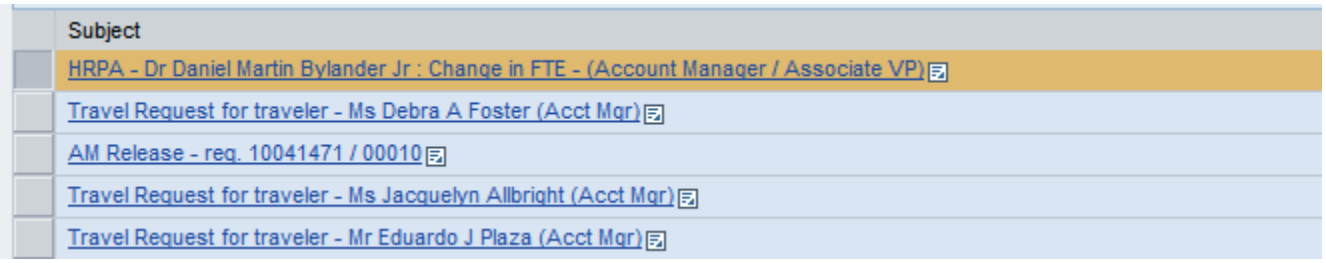


Return to the Worklist.

Click the Refresh link.



The previous Change in Cost Distribution is no longer in the Worklist.



Process any other items in the Worklist or log off the portal.