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.
Employees In Org Unit

- New search options are available to find your employee.
### 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

*Rev. 4.2021*
Start Process for Employee Inside Org. Unit

Search Criteria

Employee contains: Name or Last name - Display all employees that match

Result List: 2 Employees

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Pers. Num.</th>
<th>Org. Unit</th>
<th>Organizational Unit Name</th>
<th>Position</th>
<th>Position Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alexandra M Wiltz</td>
<td>00010488</td>
<td>50000052</td>
<td>University Library</td>
<td>99999999</td>
<td>Integration: default posi</td>
</tr>
<tr>
<td>Alexandra M Wiltz</td>
<td>00017890</td>
<td>50000052</td>
<td>University Library</td>
<td>50005010</td>
<td>Student Worker</td>
</tr>
</tbody>
</table>
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

**Result List:** 839 Employees

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Pers. Num.</th>
<th>Org. Unit</th>
<th>Organizational Unit Name</th>
<th>Position</th>
<th>Position Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Antonio Padilla</td>
<td>00031729</td>
<td>50000092</td>
<td></td>
<td>50012679</td>
<td>Administrative Asst II (H)</td>
</tr>
<tr>
<td>Ashley M Storey</td>
<td>00011064</td>
<td>50000092</td>
<td></td>
<td>50006066</td>
<td>Student Worker</td>
</tr>
<tr>
<td>Barrett J Morris</td>
<td>00004254</td>
<td>50000092</td>
<td></td>
<td>50005167</td>
<td>Student Worker</td>
</tr>
<tr>
<td>Carol B Wagner</td>
<td>00011591</td>
<td>50000092</td>
<td></td>
<td>50009029</td>
<td>Program Faculty-Group Pos</td>
</tr>
<tr>
<td>Clayton N Crawford</td>
<td>00015739</td>
<td>50000169</td>
<td></td>
<td>99999999</td>
<td>Integration: default pos</td>
</tr>
<tr>
<td>Dr Jo A Webber</td>
<td>00012534</td>
<td>50000092</td>
<td></td>
<td>50009500</td>
<td>Associate Dean</td>
</tr>
<tr>
<td>Dr Larry R Price</td>
<td>00012531</td>
<td>50000092</td>
<td></td>
<td>50009559</td>
<td>Associate Dean</td>
</tr>
<tr>
<td>Dr Leslie L Hulling</td>
<td>00001234</td>
<td>50000092</td>
<td></td>
<td>50001360</td>
<td>Grant Director, Faculty</td>
</tr>
<tr>
<td>Dr Lila Kay Lloyd</td>
<td>00017074</td>
<td>50000092</td>
<td></td>
<td>50009561</td>
<td>Assistant Dean</td>
</tr>
<tr>
<td>Dr Richard Radcliffe</td>
<td>00020770</td>
<td>50000092</td>
<td></td>
<td>50009561</td>
<td>Assistant Dean</td>
</tr>
<tr>
<td>Dr Rosalinda B Barrera</td>
<td>00009876</td>
<td>50000092</td>
<td></td>
<td>50001027</td>
<td>Dean, Education</td>
</tr>
</tbody>
</table>

**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”

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Pers. Num.</th>
<th>Org. Unit</th>
<th>Organizational Unit Name</th>
<th>Position</th>
<th>Position Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Antonio Padilla</td>
<td>00031729</td>
<td>50000092</td>
<td>College of Education</td>
<td>50012679</td>
<td>Administrative Asst II (H)</td>
</tr>
<tr>
<td>Ashley M Storey</td>
<td>00011064</td>
<td>50000092</td>
<td>College of Education</td>
<td>50006066</td>
<td>Student Worker</td>
</tr>
<tr>
<td>Barrett J Morris</td>
<td>00004254</td>
<td>50000092</td>
<td>College of Education</td>
<td>50005167</td>
<td>Student Worker</td>
</tr>
<tr>
<td>Carol B Wagner</td>
<td>00011591</td>
<td>50000092</td>
<td>College of Education</td>
<td>50009029</td>
<td>Program Faculty-Group Pcs</td>
</tr>
<tr>
<td>Dr Jo A Webber</td>
<td>00012534</td>
<td>50000092</td>
<td>College of Education</td>
<td>50009560</td>
<td>Associate Dean</td>
</tr>
<tr>
<td>Dr Larry R Price</td>
<td>00012531</td>
<td>50000092</td>
<td>College of Education</td>
<td>50000550</td>
<td>Associate Dean</td>
</tr>
<tr>
<td>Dr Leslie L Huling</td>
<td>00001234</td>
<td>50000092</td>
<td>College of Education</td>
<td>50001360</td>
<td>Grant Director, Faculty</td>
</tr>
<tr>
<td>Dr Lisa Kay Lloyd</td>
<td>00017074</td>
<td>50000092</td>
<td>College of Education</td>
<td>50009561</td>
<td>Assistant Dean</td>
</tr>
<tr>
<td>Dr Richard Radcliffe</td>
<td>00020770</td>
<td>50000092</td>
<td>College of Education</td>
<td>50009561</td>
<td>Assistant Dean</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Position Name</th>
<th>Personnel Area</th>
<th>Subarea</th>
<th>EE Group</th>
<th>EE Subgroup</th>
<th>Status</th>
<th>Person ID</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative Asst II</td>
<td>1400</td>
<td>BE FT (40)</td>
<td>Staff</td>
<td>12 Mo NE Salaried</td>
<td>Active</td>
<td>A00265091</td>
<td>Direct Report</td>
</tr>
<tr>
<td>Student Worker</td>
<td>1300</td>
<td>NBE FT (&lt;20)</td>
<td>Student</td>
<td>NE Hourly</td>
<td>Active</td>
<td>A00497845</td>
<td>Administrator for…</td>
</tr>
<tr>
<td>Student Worker</td>
<td>1300</td>
<td>NBE FT (&lt;20)</td>
<td>Student</td>
<td>NE Hourly</td>
<td>Active</td>
<td>A00508215</td>
<td>Administrator for…</td>
</tr>
<tr>
<td>Student Worker</td>
<td>1200</td>
<td>NBE FT (&lt;20)</td>
<td>Student</td>
<td>NE Hourly</td>
<td>Active</td>
<td>A00479919</td>
<td>Administrator for…</td>
</tr>
<tr>
<td>Student Worker</td>
<td>1300</td>
<td>NBE FT (&lt;20)</td>
<td>Student</td>
<td>NE Hourly</td>
<td>Active</td>
<td>A00471479</td>
<td>Administrator for…</td>
</tr>
</tbody>
</table>
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:

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

Note the buttons at the top of the page, rather than the bottom.

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

<table>
<thead>
<tr>
<th>Purpose of the Form</th>
</tr>
</thead>
<tbody>
<tr>
<td>The purpose of this form is to change an employee's funding source in the SAP system.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Employee Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full name of the Employee: Mrs Martha N Bird</td>
</tr>
<tr>
<td>Position: Academic Budget Specialist</td>
</tr>
<tr>
<td>Supervisor Name: Dr T Jaime Chahan</td>
</tr>
<tr>
<td>Supervisor's Position: Dean, Applied Arts</td>
</tr>
<tr>
<td>Person ID: 50000359</td>
</tr>
<tr>
<td>EE Group: Staff</td>
</tr>
<tr>
<td>EE Subgroup: 12 Mo NE Salared</td>
</tr>
<tr>
<td>Org. Unit: 50001488</td>
</tr>
<tr>
<td>Assignment Number: A00140254</td>
</tr>
<tr>
<td>Personnel Area: Academic Affairs</td>
</tr>
<tr>
<td>Personnel Subarea: BE FT (40)</td>
</tr>
<tr>
<td>Subarea: (300)</td>
</tr>
<tr>
<td>Status: Active</td>
</tr>
<tr>
<td>FTE: 100.00</td>
</tr>
<tr>
<td>Payroll Area: M1</td>
</tr>
<tr>
<td>Assignment Number: 00001288</td>
</tr>
<tr>
<td>Subarea: BE FT (40)</td>
</tr>
<tr>
<td>Payroll Area: M1</td>
</tr>
</tbody>
</table>

Rev. 4.2.0.21
Enter Data for PCR

**Change Data**

- **Effective Date:** 01/25/2021
- **Reason for Action:** Change in cost distribution

**Current Accounting Information**

<table>
<thead>
<tr>
<th>Company Code</th>
<th>Percentage</th>
<th>Cost Center</th>
<th>Order</th>
<th>WBS Element</th>
<th>Name</th>
<th>Fund</th>
</tr>
</thead>
<tbody>
<tr>
<td>754</td>
<td>100.00</td>
<td>1318000000</td>
<td></td>
<td></td>
<td>Coll/Applied Arts</td>
<td>1000054121</td>
</tr>
</tbody>
</table>

**New Accounting Information**

<table>
<thead>
<tr>
<th>Company Code</th>
<th>Percentage</th>
<th>Cost Center</th>
<th>Order</th>
<th>WBS Element</th>
<th>Name</th>
<th>Fund</th>
</tr>
</thead>
<tbody>
<tr>
<td>754</td>
<td>75.00</td>
<td>1212000000</td>
<td></td>
<td></td>
<td></td>
<td>2000011021</td>
</tr>
</tbody>
</table>

**Funding End Date (Grants Only)**

Funding Ending Date (Grants): [Enter]

**Comments**

Current Comments: [Enter]  
HR Admin Comments: [Enter]
No Change in PCR Error Checks

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

Full name of the Employee: Mrs Martha N Bird
Position: Academic Budget Specialist
Supervisor Name: Dr T Jalmo Chahin
Supervisor's Position: Dean, Applied Arts

Person ID: A00140264
EE Group: Staff
EE Subgroup: 12 Me NE Salaried
Org. Unit: College of Applied Arts

Change Data
Effective Date: 01/25/2021
Reason for Action: Change in cost distribution

Current Accounting Information

<table>
<thead>
<tr>
<th>Company Code</th>
<th>Percentage</th>
<th>Cost Center</th>
<th>Order</th>
<th>WBS Element</th>
</tr>
</thead>
<tbody>
<tr>
<td>754</td>
<td>100.00</td>
<td>13180900000</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

New Accounting Information

<table>
<thead>
<tr>
<th>Company Code</th>
<th>Percentage</th>
<th>Cost Center</th>
<th>Order</th>
<th>WBS Element</th>
</tr>
</thead>
<tbody>
<tr>
<td>754</td>
<td>75.00</td>
<td>12120000000</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Same error check functionality that exists today. Percentage must be 100%.
Add Attachments to PCR

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

Click the Form Utilities button to view a .pdf

Texas State University
The young STAR of Texas

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

Rev. 4.2021
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

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Pers. Num...</th>
<th>Org. Unit</th>
<th>Employee Select...</th>
<th>Organizational Unit Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>No data available</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Start Process for Employee Outside Org. Unit

Employee is:

- Asterisk (*) - Not Allowed
- PERNR - Not Allowed

Valid values: Person ID, name or last name

Rev. 4.2.021
Start Process for Employee Outside Org. Unit

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
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

Asterisk (*) - Not allowed
PERNR - Not allowed
Valid values:
Person ID, name or last name

Rev. 4.2021
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 - Master Data Center**
  
  hrmdc@txstate.edu
  
  5.2557

- **Faculty Resources**
  
  FacultyResources@txstate.edu
  
  5.2786