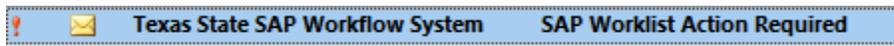


Electronic PCR Approval in the SAP Worklist

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.

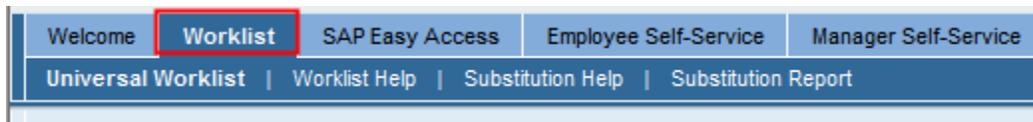
To Proceed:

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

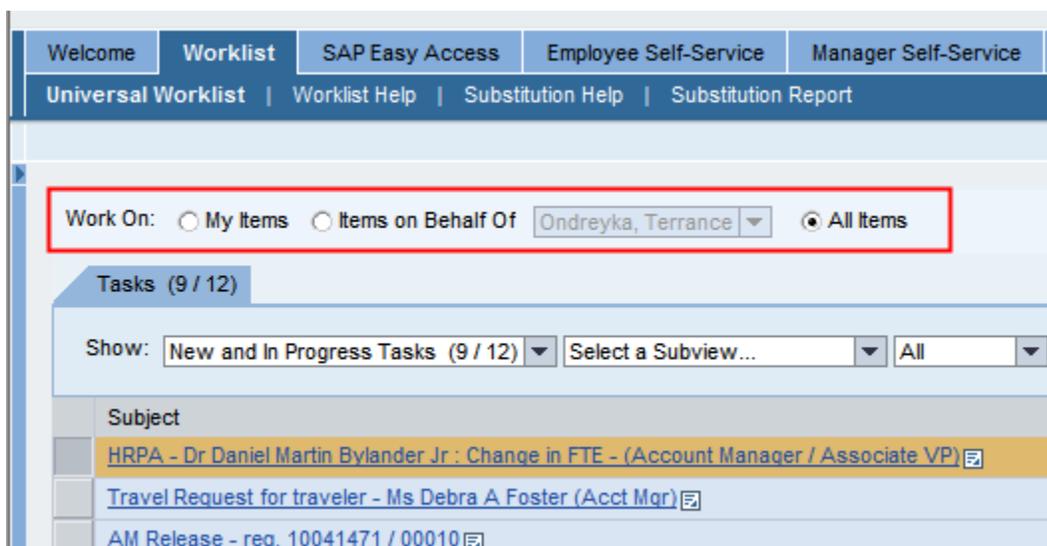
Items on Behalf Of includes tasks assigned due to the approvers status as a substitute

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.

Work On: My Items Items on Behalf Of Ondreyka, Terrance All Items

Tasks (10 / 13)

Show: New and In Progress Tasks (10 / 13) Select a Subview... All

Subject
HRPA - Dr Daniel Martin Bylander Jr : Change in FTE - (Account Manager / Associate VP)
HRPA - Mr Russell S Phillips : Change in Cost Distribution - (Account Manager / Associate VP)
Travel Request for traveler - Ms Debra A Foster (Acct Mgr)
AM Release - req. 10041471 / 00010
Travel Request for traveler - Ms Jacquelyn Albright (Acct Mgr)
Travel Request for traveler - Mr Eduardo J Plaza (Acct Mgr)
AM Release - req. 10041440 / 00020
AM Release - req. 10041433 / 00020
Collective Approval of Working Times - Salaried
Purchase Order Created - 4500052831

Row 1 of 13

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



Subject
HRPA - Dr Daniel Martin Bylander Jr : Change in FTE - (Account Manager / Associate VP)
HRPA - Mr Russell S Phillips : Change in Cost Distribution - (Account Manager / Associate VP)
Travel Request for traveler - Ms Debra A Foster (Acct Mgr)
AM Release - req. 10041471 / 00010
Travel Request for traveler - Ms Jacquelyn Albright (Acct Mgr)
Travel Request for traveler - Mr Eduardo J Plaza (Acct Mgr)

The tasks are sorted alphabetically.

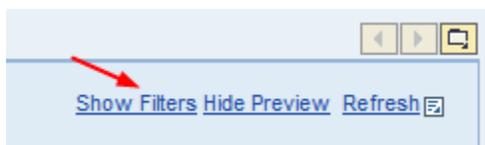
Subject
AM Release - req. 10041433 / 00020
AM Release - req. 10041440 / 00020
AM Release - req. 10041471 / 00010
Collective Approval of Working Times - Salaried
HRPA - Dr Daniel Martin Bylander Jr : Change in FTE - (Account Manager / Associate VP)
HRPA - Mr Russell S Phillips : Change in Cost Distribution - (Account Manager / Associate VP)
Purchase Order Created - 4500030595
Purchase Order Created - 4500048473
Purchase Order Created - 4500052831
Requisition REJECTED - 10021274 / 00010

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

Sent		Status	Substituted For
Today	1	New	Hughes, Mark
Today			Hughes, Mark
Jun 21, 2011	1	New	Ondreyka, Terrance

Sorted in descending order

In addition to sort options, filters are also available.



Click on “Show Filters”.

Filtering options are now available.

Work On: My Items Items on Behalf Of Ondreyka, Terrance All Items

Tasks (9 / 12)

Show: New and In Progress Tasks (9 / 12) Select a Subview... All

High Priority Due Date: Select One... Sent Date: Select One... Text: Apply Reset

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

Tasks (10 / 13)

Show: New and In Progress Tasks (10 / 13) Select a Subview... All

High Priority Due Date: Select One... Sent Date: Select One... Text: Apply

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

Tasks (10 / 13)

Show: New and In Progress Tasks (10 / 13) Select a Subview... All

High Priority Due Date: Select One... Sent Date: Select One... Text:

Subject

HRPA - Dr Daniel Martin Bylander Jr : Change in FTE - (Account Manager / Associate VP)
HRPA - Mr Russell S Phillips : Change in Cost Distribution - (Account Manager / Associate VP)

The "Sent Date" offers various filter options.

Tasks (10 / 13)

Show: New and In Progress Tasks (10 / 13) Select a Subview... All

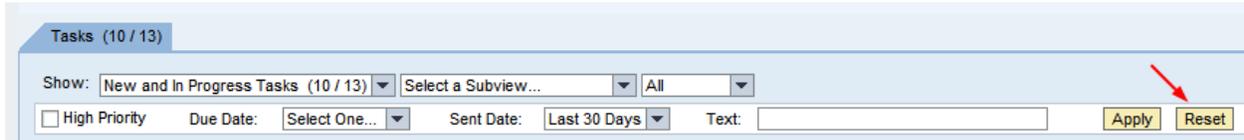
High Priority Due Date: Select One... Sent Date: Select One... Text:

Subject

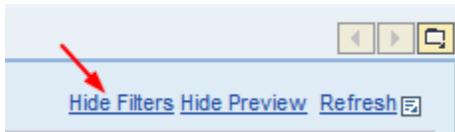
HRPA - Dr Daniel Martin Bylander Jr : Change in FTE - (Account Mana
HRPA - Mr Russell S Phillips : Change in Cost Distribution - (Account M
Travel Request for traveler - Ms Debra A Foster (Acct Mgr)
AM Release - req. 10041471 / 00010

(Note: The "Sent Date" dropdown menu is open, showing options: Select One..., Today, Yesterday, Last 7 Days, Last 30 Days, Last 90 Days)

To refresh the filters, click the “Reset” button

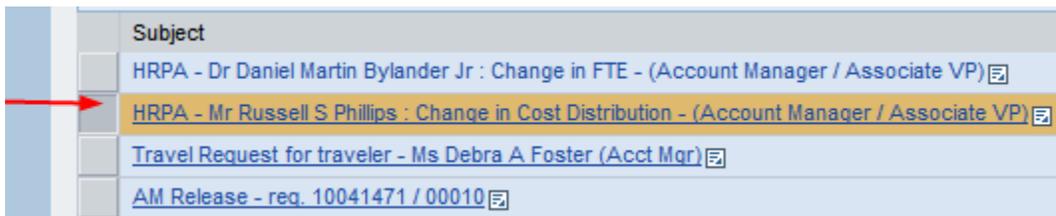


To eliminate the filters, click on “Hide Filters”.



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.

HRPA - Mr Russell S Phillips : Change in Cost Distribution - (Account Manager / Associate VP) [E]

Travel Request for traveler - Ms Debra A Foster (Acct Mgr) [E]

AM Release - req. 10041471 / 00010 [E]

Travel Request for traveler - Ms Jacquelyn Allbright (Acct Mgr) [E]

Travel Request for traveler - Mr Eduardo J Plaza (Acct Mgr) [E]

AM Release - req. 10041440 / 00020 [E]

AM Release - req. 10041433 / 00020 [E]

Collective Approval of Working Times - Salaried [E]

Purchase Order Created - 4500052831 [E]

Row 1 of 13

HRPA - Mr Russell S Phillips : Change in Cost Distribution - (Account Manager / Associate VP)

Sent: Jul 6, 2011 8:58 AM by Munoz, Joyce
 Status: New

Approval Level.....Account Manager / Associate VP

Effective Date.....06/27/2011
 Process Number.....000000001152

Personnel Number.....00005445
 Position.....50001527 Systems Programmer I
 Organization.....Enterprise Systems
 Job.....00001488 Systems Programmer I

Payroll Area.....M1
 Personnel Area / Subarea.....Information Technology.. BE FT (40)
 Employee Group / Subgroup....Staff.. 12 Mo Ex Salaried

Initiator.....Ms Jane L Smith (JM47)
 Created on.....07/06/2011 @ 08:57:59

Account Manager.....Mr Mark A Hughes (MH66)
 Acct Mgr Position.....50009657 Assoc VP, Technology Resources
 Acct Mgt Organization...50000054 Technology Resources Administration
 Acct Mgr Pers Area.....1200 Information Technology

Attachments

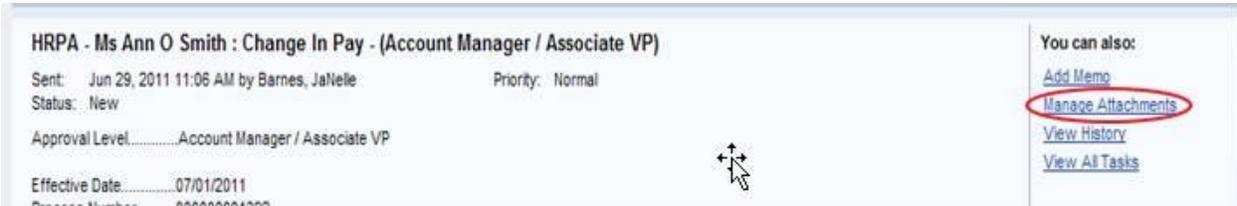
Type	Title
	Step Object: Step Object

Forward Assign To Me Open Form

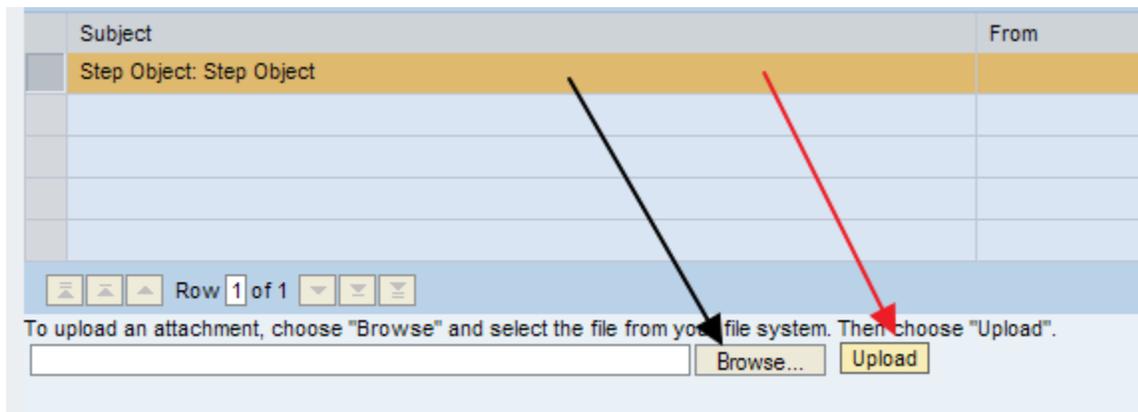
After preview, you may now open the form to approve the PCR OR you can complete the additional step necessary to attach support documents prior to the approval step.

- 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 <i>The rising STAR of Texas</i>		Texas State University-San Marcos	
		Change in Cost Distribution	
Effective Date	<input type="text" value="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.

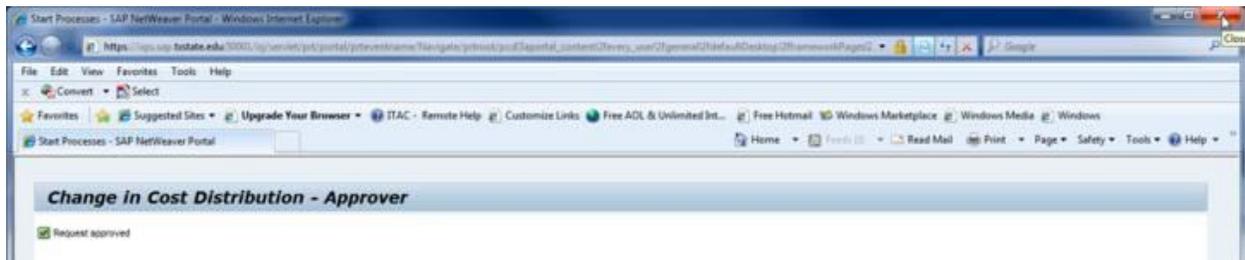
Change in Cost Distribution - Approver

Request approved

Click on the

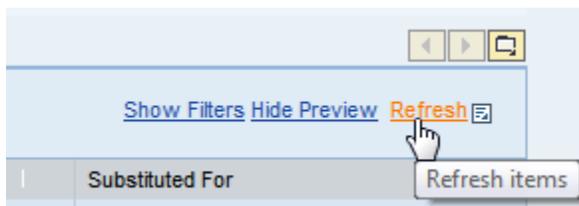


to close the window.



Return to the Worklist.

Click the Refresh link.



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

Subject
HRPA - Dr Daniel Martin Bylander Jr : Change in FTE - (Account Manager / Associate VP) 
Travel Request for traveler - Ms Debra A Foster (Acct Mgr) 
AM Release - req. 10041471 / 00010 
Travel Request for traveler - Ms Jacquelyn Allbright (Acct Mgr) 
Travel Request for traveler - Mr Eduardo J Plaza (Acct Mgr) 

Process any other items in the Worklist or logoff the portal, if complete.

