Updating a Position Description

1. Creating a New Transaction
An existing HR Transaction can be used as a template for updating and creating a new HR Transaction. A system user can get to this function in two ways:

   a. Starting from the Main Menu

      Check the box next to Update PD press the ‘New Transaction’ button. A Box will pop up requiring an Empl ID/Empl Rcd # for which the HR Transaction will be created.

NOTE: If a Transaction already exists for the entered appointment, the system will copy the latest approved PD to be used as a template for the new PD requested.
b. **Starting from the Search Screen**

Select (check the box) next to an HR Transaction on a search results list and then select 'Copy HR Tran to New Tran' at the top of the screen.
2. After selecting ‘Copy HR Tran to New Tran,’ the following menu appears:

3. Choose the “Copy for Update” tab
'Copy Authorization to Hire Information' Box Checked - The highlighted or displayed HR Transaction is used as a template for a new HR Transaction. All data from the original Auth to Hire tabs are used in the creation of the new HR Transaction. Also, defaults for UDDS, etc., set in the user's profile, overlay the like fields in the new HR Transaction.

'Copy Goals, Activities and Knowledges' Box Checked - The highlighted or displayed HR Transaction is used as a template for a new HR Transaction. All data from the original HR Transaction on the goals, activities and knowledges tabs, including the associated titles, are used in the creation of the new HR Transaction.

'Copy Organization Chart' Box Checked - The highlighted or displayed HR Transaction is used as a template for a new HR Transaction. All data from the original HR Transaction on the Org Chart Tab are used in the creation of the new HR Transaction.

'Copy Exclusion Forms' Box Checked - The highlighted or displayed HR Transaction is used as a template for a new HR Transaction. All data from the original HR Transaction on the Exclusions Tabs are used in the creation of the new HR Transaction.

Should the PD be created for the Same Empl ID/Empl Rcd or a Different One? - The highlighted or displayed HR Transaction is used as a template for a new HR Transaction. All data from the original HR Transaction is used in the creation of the new HR Transaction. This option is only available for Position Vacancy HR Transactions that have a status of 'Closed.'

If the HR Transaction is for the same person as the original HR Transaction, select “Same Empl ID/Empl Rcd.” If the HR Transaction is for a different person, select “Different Empl ID/Empl Rcd” and enter the individual’s Empl ID/Empl Rcd.

Copy - Copies the selected HR Transaction to a new Update HR Transaction using the criteria associated with the check boxes.

Cancel - Closes the 'Copy' screen and returns to the calling screen.
4. Make any updates to the existing PD

![HR Transaction: UW - Madison Classified Human Resources Information System](image)

**General Data**

**Goals Activities**

**Knowledge and Skills**

**Org Chart**

**Comments**

**Exclusions**

**History**

**HR Transaction General Information: Page 1**

**Employee:** KAREN L DORMAN

**Please Read:** - An item with a blue label and an asterisk (*) is required.
- Only fields with white backgrounds can be key entered.

**UDDS: 403890**

**MEDICAL SCHOOL/PATHOL-LAB MED**

**Status:**

**Code**

**Classification**

**Urgent Unit:**

**Supervision Type:**

**Tran Comments**

**Supervisor:**

**Last Name:** Kulow

**First Name:** Rachel

**Title:** Assistant Director, Business Services

**Supervisor's Email Address:**

**Employees With Similar Duties**

**Last Name**

**First Name**

**Title**

**HR Transaction ID:** 000092325

**Position #:** 01427432

**PDLTE Eff Date:**

**Empl ID / Empl Rcd:** 00495342

**HR Transaction Type:** Update

**Cancel New HR Trans**

**Save**

**Page 1 Changed:**
5. Error Checking

Once the main components of the position description have been entered, go to the menu bar, and under ‘Tools’ select 'Error Check Entire HR Transaction'. This will check for any errors that have to be fixed before continuing. Fix everything that needs to be changed. Continue until no more errors.

1. Error Results Lists – If data is missing or inconsistent, a window will appear listing all of the errors. There are a few edits that apply only for HR staff approving a PD that are not checked at submittal time.

2. Fixing Errors – Press the 'Go to Error' button to display the field that needs to be corrected. Correct the error and select 'PD Errors' which now appears on the menu bar. The edits will be done again and display any remaining errors.

3. When the error check returns with no errors, you are now ready to submit the HR transaction to the next level for approval. To do this, press 'Submit' under the ‘Action’ menu item at the top of the screen. This will send the Transaction to the next level for approval.

4. To keep track of the status of your HR Transaction, go into the Transaction and select the ‘History’ tab.

6. Submission, Rejection and Approval

1. Transaction Submittal - Upon successful submittal, an email is sent to the next level HR staff listed in the CHRIS system; in most cases, this will be the Division HR staff. In some cases, it will be the Department HR staff. Only that level person or higher can edit the HR Transaction. The supervisor who submitted the Transaction and her/his proxies can only view the data at this point.

2. Transaction Approval - If the HR person reviewing the HR Transaction accepts the PD, s/he can approve it. Approval sends it to the next level HR staff. An email is sent unless the next level is Classified Human
Resources (CHR). People at the level at which the approval was done can only view the data, except in the case of CHR.