Transaction pages: dos and don'ts [1]

January 5, 2016 by Employee Services [2]

Many users have reported problems using transaction pages. **For now, please do not report transaction page errors.** We are monitoring and identifying errors using daily system reports.

You can help reduce errors by following HCM step-by-step guides, located on the right side of each page in the HCM Community site. Following correct procedure is very important, as many of the data entry processes are significantly different than what you've used in HRMS.

First, what are transaction pages?

Transaction pages centralize data. Whereas you once entered multiple rows within the HR system to complete one action, you now can use a transaction page to enter numerous job, position and other data into a single form. Once you've submitted your data, the transaction page collects and sends it to corresponding fields in HCM, making common tasks simpler and faster.

To help reduce errors during this process, we've also introduced a transaction approval workflow that grants only certain HCM users the right to correct, reject and approve these data entries. **Remember: you can't correct transactions unless you are the final approver.** Bypassing approval workflows may cause your transaction to fail.

If you need further instruction for using transaction pages, take our Skillsoft courses [3].

Need some pointers? Here are some dos and don'ts:

Do

- **Create funding before** you move someone into a position.
- **Add a new row for business unit/pay group** if you're adding a new conversion row. You can make corrections to pay groups within the row itself.
- **When hiring, only add one row for positions per each date** if the position is dated Dec. 1, 2015. If you attempt a position change instead, the system will go into correction mode and change the effective date to Nov. 30.
- **Make a pay rate change** if you're moving someone from one position to another in the same department.
- **Enter the correct Social Security number** for every POI you hire.

Don't

- **Try to correct transactions** after you've sent them to an approver. Only the final approver can make changes. Alternatively, the final approver could reject the transaction and push the data back to you, allowing you to make the changes and resubmit the transaction.

- **Make changes in job data** outside the transaction form. You can only change salary in job data.
- **Click the Position Override button**. This opens up all fields in job data and causes many problems.
- **Make the effective date of a position the same date of the transaction.** You can check the effective date of each position here: Org. Dev. > Position Manage > Maintain Positions > Add/Update Position Info.

HCM Community [4], Transaction Pages [5]
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