Business Process Guide

How to Process a Work List Transaction

A guide for approving, returning, and canceling a work list transaction

HR Data Management Contacts

Please refer to the Data Management staff directory for the Data Management Specialist responsible for your department.
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Introduction

The PTR (Personnel Transaction Request) is the front-end application used to submit position and job data transactions, payroll transactions, and process-related transactions in PeopleSoft. The employee’s job/payroll information is submitted through the PTR application where it is sent to the Account Signer in your department for approval. Depending on the type of transaction, it also may be sent to other designated approvers. Once approved by all the appropriate levels, the PTR is either sent for further processing or uploaded to PeopleSoft.

Position Management is a front-end application used to submit position transactions that can be marked ready for recruitment. These transactions also use workflow and appear on the worklist of the Account Signers and others in the department for approval.

Process Diagram for Workflow

1. PTR/Position is originated by a department user.

2. A specific set of workflow pathways will be generated for the transaction per the current matrix.

3. Each step must be approved by one of the listed approvers for that step, in order.

4. Transaction is sent for further processing or is staged for future update. PTR updates to Job Data once all approvers have approved; Position integrates to Kenexa at next integration.
Preparation

Security Roles You Will Need

The security roles should be distributed according to your department’s internal business processes. Some users will have all roles; others will have a few roles and will need to work with other users in the department to complete the full process.

Each system (PTR, Position and Workflow) requires specific roles to complete the necessary transactions.

Also listed in this guide are several other roles needed for other systems that may be necessary prior to the PTR creation. These roles may all be performed by the person who originates the PTR or by another person in the department.

How to Apply for These Roles

To check what roles you currently have, log in to PeopleSoft at https://hr.oasis.asu.edu. Navigate to ASU Customizations > ASU Security > Manage Security Requests > My Security Access Roles

To learn how to request a role, go to How to Submit a PeopleSoft Role Request.

Here are the roles you or someone within your department will need to start the process. There also is a brief description of the type of access these roles will provide.

Position Management Security Roles

HCM Dept Financial Mgr:
Provides you with the ability to review and create or modify a position as well as to update the funding tied to a position number. Access to the position work list is also granted.

HCM Dept Position Manager:
Provides you with the ability to review and create or modify a position number. Access to the position work list is also granted.
**PTR Originator**

This role provides you with the ability to submit personnel transactions through the PTR.

**Security Training**

Note that all three of these roles require training in order to gain access. You can self-enroll into a class available on-line in Blackboard.

- For access to Financial Manager or Position Manager roles go to [http://links.asu.edu/positionmgt](http://links.asu.edu/positionmgt)
- For access to PTR Originator role go to [http://links.asu.edu/ptr](http://links.asu.edu/ptr)

Follow the instructions found within the course to gain access to your role.
## Workflow Roles

### Human Capital Management (HR) - HR Personnel (HR)

<table>
<thead>
<tr>
<th>Role</th>
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</tr>
</thead>
<tbody>
<tr>
<td>ASU Renewal Submission</td>
<td>OHR Payroll Configuration</td>
</tr>
<tr>
<td>Component Interface HCM role</td>
<td>OHR Personnel Configuration</td>
</tr>
<tr>
<td>HCM Department View</td>
<td>OHR Personnel Super User</td>
</tr>
<tr>
<td>HCM Dept Tenure Manager</td>
<td>OHR Personnel View</td>
</tr>
<tr>
<td>HCM Dept Tenure View</td>
<td>OHR Query Run-Only</td>
</tr>
<tr>
<td>HCM Job Data View</td>
<td>OHR Tree Manager Upd</td>
</tr>
<tr>
<td>HCM Nurse Mgrs Update licenses</td>
<td>Provost Tenure Data</td>
</tr>
<tr>
<td>HCM ORSPA Redist Approval</td>
<td>PTR Admin</td>
</tr>
<tr>
<td>HCM ORSPA View 1</td>
<td>PTR Approver</td>
</tr>
</tbody>
</table>

**PTR Approver:** This role provides access to the work list to approve transactions at the account signer level for both PTR and Position Management. To apply for this role, the user must be a signer in the Advantage Account Signer Tables.

There is no formal training required to request this role; however, it would be helpful to review the training documents at [cfo.asu.edu/personnel-transaction-request](http://cfo.asu.edu/personnel-transaction-request).

### Human Capital Management (HR) - HR Personnel (HR)

<table>
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<td>HCM ORSPA View 1</td>
<td>PTR Approver</td>
</tr>
<tr>
<td>HCM ORSPA View 2</td>
<td>PTR CFO Provost EVP</td>
</tr>
<tr>
<td>HCM Registrar View</td>
<td>PTR Data Mgmt</td>
</tr>
<tr>
<td>HCM Student Employ Mgr</td>
<td><strong>PTR Dean/VP Approver</strong></td>
</tr>
</tbody>
</table>

**PTR Dean/VP Approver:** This role provides access to the work list to approve transactions at the Dean/VP level for both Position and PTR. Members of this role must be the Dean/VP or someone who has been designated by the Dean/VP to perform approvals on their behalf.

There is no formal training required to request this role; however, it would be helpful to review the training documents at [cfo.asu.edu/personnel-transaction-request](http://cfo.asu.edu/personnel-transaction-request).
**PTR Provost EVP**: This role provides access to the work list to approve transactions at the Provost/EVP level for PTR and Position Management. Membership in this role is limited and will only be granted if you have been designated by the Provost/EVP to obtain access to this role.

There is no formal training required to request this role; however, it would be helpful to review the training documents at cfo.asu.edu/personnel-transaction-request.

**Note**: There are many other security roles required to make the PTR process flow smoothly. All other roles are specific to areas within OHR, Financial Services, or Student Administration, and should not be requested by people outside of those groups.
General Overview of Work List

Select Work list Page

ASU Customizations >ASU HCM Custom >ASU HR >Personnel Transaction Request >PTR Worklist

This is the default landing page when you navigate to the PTR and Position Work list. This page will display the total number of transactions on both the PTR Work list and Position Work list. You can navigate to either work list from this page by clicking the link to that work list or using the tabs at the top of the page.

<table>
<thead>
<tr>
<th>Filter</th>
<th>Filter</th>
</tr>
</thead>
<tbody>
<tr>
<td>PTR Worklist</td>
<td>Position Worklist</td>
</tr>
<tr>
<td>Transactions on Worklist</td>
<td>1</td>
</tr>
<tr>
<td>Transactions as Approver</td>
<td>1</td>
</tr>
<tr>
<td>Transactions as Originator</td>
<td>0</td>
</tr>
</tbody>
</table>

PTR and Position Work List Overview

At the top of the work list, you will find a series of filters to narrow your work list to view only certain items. You can select more than one filter at a time.

**PTR Filters:**

- Role
- PTR Action
- PTR Status
- Dept ID
- From Date
- To Date
- Empl ID
- Last Name
- Empl Class

**Position Filters:**

- Role
- Position
- Status
- Dept ID
- Reason for Hire
- Empl Class
A legend is provided at the top and bottom of the work list to help you determine what options are available for each specific transaction. As an Originator, you will only be able to Cancel, View/Approve and Review information about the workflow step.

The “Details” tab on this work list can be used to view other information about the transaction.

**PTR Worklist:**

**Position Worklist:**

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**PTR Statuses**

Each PTR will be given a status: Below is a chart of all the statuses and what they mean to you.

<table>
<thead>
<tr>
<th>Status</th>
<th>What this means to you</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approved (A)</td>
<td>PTR has gone through all workflows and is approved</td>
</tr>
<tr>
<td>Batch (B)</td>
<td>For PTR with a Work in Process status, this status appears for individual pieces of a job when you click on the status hyperlink. It means the PTR was approved by all levels of approval, but is for a future effective date or payroll is open. These PTRs are staged in this status until the effective date of the PTR is met or payroll has closed. PTRs in this status can still be canceled by the originator.</td>
</tr>
<tr>
<td>Draft (D)</td>
<td>A PTR was started by you, but not yet submitted for approval</td>
</tr>
<tr>
<td>CI Error (E)</td>
<td>The PTR has been approved by all approval levels, but a system error occurred and it was unable to upload to PeopleSoft. Data Management will manually process the transaction.</td>
</tr>
<tr>
<td>In-Process (I)</td>
<td>The PTR is waiting for all the approvals to be gathered for the transaction to be uploaded into job data. To find out which specific level of approval is needed, click on the “View Approvers” icon.</td>
</tr>
<tr>
<td>Manual PTR (M)</td>
<td>The PTR has been approved by all levels of approval, but an exception was identified for the PTR or pieces of the PTR. Data Management will manually process your transaction.</td>
</tr>
<tr>
<td>Status</td>
<td>What this means to you</td>
</tr>
<tr>
<td>----------------</td>
<td>------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Processed (P)</td>
<td>The PTR has successfully uploaded to PeopleSoft and the transaction will be archived when the archive process runs.</td>
</tr>
<tr>
<td>Returned (R)</td>
<td>The PTR was returned by one of the approvers because the PTR needs editing.</td>
</tr>
<tr>
<td>CI in Process (U)</td>
<td>PTR should only appear in this status briefly during the time it is being applied to Job. Before the CI processing starts, the PTR status will be set to this value. If it errors, it should be set to 'E', if it is successfully processed, status should be set to 'P'.</td>
</tr>
<tr>
<td>Work in Process (W)</td>
<td>Used when partial transactions are processed and when the PTR Updater starts to process PTR(s).</td>
</tr>
<tr>
<td>Canceled (X)</td>
<td>The PTR was canceled by the originator and is waiting for the archive process to run to archive the information.</td>
</tr>
</tbody>
</table>

The PTR will auto-archive items that have been fully approved, canceled, or returned after four days from the date it reached one of those statuses. Drafts will be auto-archived after 30 days.

**Position Statuses**

Each Position will be given a status: Below is a chart of all the statuses and what they mean to you.

<table>
<thead>
<tr>
<th>Status</th>
<th>What this means to you</th>
</tr>
</thead>
<tbody>
<tr>
<td>Batch (B)</td>
<td>The position has an effective date set for the future and will process at that time, or the position is fully approved but payroll is open. Positions will be processed once the open payroll closes.</td>
</tr>
<tr>
<td>Error (E)</td>
<td>A problem occurred during processing, which will need to be addressed by Data Management. This status will only occur for filled positions.</td>
</tr>
<tr>
<td>WF Approve (K)</td>
<td>Account funding has been added to the position, and it has been submitted for workflow approval. The position will appear on the originator’s work list.</td>
</tr>
<tr>
<td>Manual (M)</td>
<td>The position requires manual intervention by Data Management. This status will only occur for filled positions.</td>
</tr>
<tr>
<td>Not Submitted (NS)</td>
<td>The position has not been submitted and will not process until you &quot;Save and Submit.&quot; This status occurs when you choose to &quot;Save for Later.&quot;</td>
</tr>
<tr>
<td>Processed (P)</td>
<td>The position has received all needed approvals and is awaiting integration, if applicable. Or position was not marked for recruitment, was automatically approved by the system, and is ready for use.</td>
</tr>
<tr>
<td>Returned (R)</td>
<td>An approver or Data Management has denied the position and it has been returned for your review. You must edit and resubmit to continue processing or you can choose to cancel the transaction by withdrawing the position.</td>
</tr>
<tr>
<td>Submitted (S)</td>
<td>The position has been submitted but account funding has not yet been added. This status occurs when you choose to &quot;Save and Submit,&quot; but have not yet added funding through maintain position accounting.</td>
</tr>
<tr>
<td>Withdrawn (W)</td>
<td>Changes you have made no longer exist and the transaction will be removed from your work-in-progress folder. This status occurs when you choose to &quot;Withdraw&quot; a position. You can only withdraw a position with NS status or R status.</td>
</tr>
</tbody>
</table>
Positions that are in recruitment will remain on the work list until they are no longer in recruitment. This can happen either by the position being unmarked ready for recruitment by the PTR, or manually by Recruitment and Selection or Data Management.

**Approver’s Work List Overview**

At the top of the work list, you will find a series of filters to narrow your work list to view only certain items. You can select more than one filter at a time.

**PTR Filters:**

<table>
<thead>
<tr>
<th>Filter</th>
<th>PTR Action</th>
<th>PTR Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Role</td>
<td>From Date</td>
<td>To Date</td>
</tr>
<tr>
<td>Dept ID</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Empl ID</td>
<td>Last Name</td>
<td></td>
</tr>
<tr>
<td>Empl Class</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Position Filters:**

<table>
<thead>
<tr>
<th>Filter</th>
<th>Position</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dept ID</td>
<td>Reason for Hire</td>
<td>Empl Class</td>
</tr>
</tbody>
</table>

A legend is provided at the top and bottom of the work list to help you determine what options are available for each specific transaction. As an Approver, you will only be able to Approve, Return, View/Approve and Review information about the workflow step.

It is highly recommended that you use the View/Approve link to view the transaction before you decide whether to approve the transaction or return the transaction to the originator. You are the originator’s second set of eyes to make sure the data entered into the system is correct.

For Position approvals it is also recommended to review the Position Justification by clicking on the position number link on the work list. This will give you access to the comments that were entered by the originator when they created the transaction.
Because a transaction requires your approval, it will appear on your work list and you will be notified via email that you have a transaction to view. As you approve or return the transaction, the transaction will disappear from your work list.

When a step has multiple approvers listed for a given transaction, only one of those approvers must approve or return the transaction. An email will be generated to all approvers at a given step; however, if one of the approvers approves the transaction, it will no longer appear on the other approvers’ work list at that step.

**Note:** This comment box is limited to 250 characters.
After you type your comments or choose not to comment, click the “OK” button. You will then receive the following message:

**PTR Message:**

PTR 00000072487 has been approved. (21005,4)

**Position Message:**

Position 180115 has been approved. (21005,10)

Once you click the “OK” button, you will be returned to the work list and the transaction you approved will be removed from the work list.
**Note:** If you hold both Originator and Approver roles, your work list will contain both types of work list items. Your view could be different depending on the type of transaction and if you hold any additional approval roles (i.e., Dean/VP or Provost/EVP). Here is an example of what it would look like:

<table>
<thead>
<tr>
<th>Position/Justification</th>
<th>Title</th>
<th>Status</th>
<th>Workflow Step</th>
<th>FTE</th>
<th>Reg/Temp</th>
<th>DeptID</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>177318</td>
<td>Accounting Asst</td>
<td>WF Approve</td>
<td>1.000000</td>
<td>Seasonal</td>
<td>D0201</td>
</tr>
<tr>
<td>2</td>
<td>177326</td>
<td>Office Supervisor</td>
<td>WF Approve</td>
<td>1.000000</td>
<td>Regular</td>
<td>D0201</td>
</tr>
<tr>
<td>3</td>
<td>177328</td>
<td>Accountant</td>
<td>WF Approve</td>
<td>1.000000</td>
<td>Regular</td>
<td>D0201003</td>
</tr>
</tbody>
</table>

In the example above, the top two transactions are waiting for action to be taken. Since you are in the approver role, you must approve or return the transactions. Once you do so, they will be removed from your work list. The bottom transaction is one that you originated. It will remain on your work list until all approvers have approved the transaction, it has been processed into job data, and the auto-archive process runs or the position is no longer ready for recruitment.
Step-by-Step Work List

Managing PTR transactions on your work list versus Position transactions is very similar. The steps below should be used for either work list.

How to Approve a PTR/Position Work List Transaction

You should receive an email indicating that you have a transaction to approve. You can use the link in the email to navigate to the work list.

If you are unable to use the link to get to the work list, access Position/PTR Work List via My ASU:

Here is the navigation path to go to the work list directly through PeopleSoft:

ASU Customizations > ASU HCM Custom > ASU HR > Personnel Transaction Request > PTR Work List

Step 1: Locate the transaction you are trying to approve on your work list. There are many filters at the top of the page to narrow your work list view to see only the items you want to see.

PTR Work list:
Position Work list:

![Proposed Data Table Image]

**Step 2:** Use the View/Approve icon to view the PTR/Position submitted for your approval. Be sure to review the information for errors.

![View/Approve Icon Image]

**Step 3:** Click on the “Go to PTR Worklist” button to return to your work list.

On the Main PTR Page:

![Main PTR Page Image]

On the Position Cross-Reference Page:

![Position Cross-Reference Page Image]
**Step 4:** To view the list of approvers, click on the “Workflow Step” link.

**PTR Work list:**

![Workflow Step Link Example]

**Position Work list:**

![Position Work List Example]

To see the list of approvers, click on the “Multiple Approvers” link.

![Account Signer Example]
A window similar to this will pop-up, which contains all the approvers at the level selected.

Step 5: Click the “Return” button to return to your work list.
Step 6: Click on the Approve icon.

PTR Work list:

You may also approve the PTR by clicking on the “Approve” button at the bottom of the PTR.

Position Work list:

You may also approve the Position by clicking on the “Approve” button at the bottom of Position Cross Reference.
**Step 7:** You will be prompted to enter comments on your approval. Please type in the comments and click the “OK” button.

Comments are not required on an approval. If you do not want to comment, leave the comment field blank and click the “OK” button.

You will receive a message that indicates the approval has been processed for the specific employee you have selected. Click the “OK” button to continue.

**PTR Message:**

**Position Message:**

**Step 8:** Repeat above steps and approve another transaction or sign out of PeopleSoft.
How to Return a PTR/Position Transaction from Your Work List

You should receive an email telling you there is a transaction to approve. Click on the link in the email to navigate to the work list.

If you are unable to use the link to get to the work list, access PTR/PTR Work List via My ASU:

Here is the navigation path to go to the work list directly through PeopleSoft:

ASU Customizations > ASU HCM Custom > ASU HR > Personnel Transaction Request > PTR Work List

Step 1: Locate the transaction you are trying to return on your work list.

There are many filters at the top of the page to narrow your work list view to see only the items you want to see.

Position Work list:
Step 2: Use the View/Approve icon to view the PTR/Position submitted for your approval. Be sure to review the information for errors.

![View/Approve icon]

Step 3: Click on the “Go to PTR Worklist” button to return to your work list.

On the Main PTR Page:

![Go to PTR Worklist button]

On the Position Cross-Reference Page:

![Account Signer]

Step 4: To view the list of approvers, click on the “Workflow Step” link.

PTR Worklist:
Position Work list:

To see the list of approvers, click on the “Multiple Approvers” link.

A window similar to this will pop-up, which contains all the approvers at the level selected.
Step 5: Click the “Return” button to return to your work list.

![ PTR Worklist AWE Monitor](image)

Step 6: Click on the Return icon.

PTR Work list:

![ PTR Worklist AWE Monitor](image)

You may also return the PTR by clicking on the “Return” button at the bottom of the PTR.

Position Work list:

![ Position Work list](image)
You may also return the Position by clicking on the “Return” button at the bottom of Position Cross Reference.

Step 7: You will be prompted to enter comments. These required comments should reflect the reason you are returning the transaction and what you would like the originator to do. Once the comments are entered, click the “OK” button.

You will receive a message that indicates the return has been processed for the specific employee you have selected.

PTR Message:
Position Message:

An email will be automatically generated to the Originator to let him/her know you have returned the PTR/Position.

**Step 8:** Repeat the above steps and return another transaction or log out of PeopleSoft.

**How to Cancel a PTR/Position Transaction from Your Work List**

The ability to cancel a transaction is granted only to the Originator of that transaction. PTR transactions that an originator has submitted or saved as draft will appear on the work list until fully approved/canceled and archived or returned. Originators can cancel a transaction at any point before the transaction has received all approvals. Position transactions that have been submitted will appear on the work list until fully approved and archived, canceled, or returned. Originators can only cancel new positions at any point before the transaction has received all approvals. The cancel button will be greyed out for modified positions—these positions must be returned and withdrawn to be canceled.

**Step 1:** Locate the transaction you are trying to cancel on your work list. There are many filters at the top of the page to narrow your work list view to see only the items you want to see.
PTR Work list:

Position Work list:

**Step 2:** Click on the “Workflow Step” link to view comments (if any) of other people who have approved the transaction.

PTR Work list: status must be In-Process or Pend Batch to cancel

Position Work list: position must be new and status must be WF Approve to cancel
Step 3: Click the “Return” button to return to your work list.

Step 4: Click the “Cancel” icon.

PTR Work list:

You may also cancel the PTR by clicking on the “Cancel” button at the bottom of the PTR.
Position Work list: this is the only way to cancel a position

Step 5: You will be prompted to confirm you want to cancel the PTR/Position. Click the “OK” button if you want to proceed.

**Note:** The status on the PTR work list will automatically be changed to canceled (the canceled position will be automatically removed from the work list).

The PTR will be auto-archived five days after this action was taken. If you would like to manually archive the transaction you must go to the Main PTR Page to do so. If you manually archive your PTR, the employee record will be available immediately for further action to be taken by you or another originator in your department.

All people who have approved the transaction previously will be notified via email that the transaction has been canceled.
If no approvers had approved the transaction prior to the originator’s cancel action, they will not be sent an email. When the approver reaches the work list page, there will no longer be a transaction available for them to approve.

**Other Functionality That May be Used:**

**PTR**

**Edit PTR Function**

As an originator, there may be cases in which you would like to resubmit a PTR you have canceled. You can resubmit the PTR by clicking on the “Edit PTR” button at the bottom of the Main PTR Page.

You will receive a message indicating a new PTR must be created to regenerate the workflow that would associate with the new transaction.

This will cause the PTR fields to be opened for data entry. You can then make any changes and click on the “Save and Send for Approval” button at the bottom of the page.
Position

Withdraw a Position

As an originator, you have the ability to cancel any newly created positions before they are fully approved, but you cannot cancel a transaction for a modified position. However, you can withdraw this transaction, which is essentially the same action.

In order to withdraw a position change request, the position number needs to be in either a “Not Submitted” or “Returned” status. You can therefore withdraw while you are in the middle of creating or modifying a position by clicking the button at the bottom of the page, you can reenter a position with a “Not Submitted” status that you originally saved for later and click the Withdraw button, or you can enter a “Returned” position in order to withdraw.

On the Position Work list, only a modified position will show the cancel button greyed out while the status is **WF Approve**. If you need to cancel this transaction, contact an approver and request the transaction be returned to you.

Once you receive notification of the return, you can view the transaction in your work list:

To withdraw, navigate to your Return to Work-In-Progress menu using this navigation: **ASU Customizations > ASU HCM Custom > ASU Position Management > Create/Modify Positions**

Click on the position link for the position in a Returned status:
Click on the Withdraw button at the bottom of the page:

![Withdraw button]

A new window will open. Click ‘Continue Withdrawal’ to complete the withdrawal. The Position will be removed from the Work in Progress list.

**Position Management Information**

![Warning Message]

**Workflow Matrix**

The most current workflow matrix for both Position and PTR is available on the [Personnel Transaction Request site](https://cfo.asu.edu/recruitment). It is important to note that this matrix can be changed at any time, which will also be reflected in the PTR/Position workflow. If changes are made to the workflow, these changes apply to any PTR/Position that is submitted after the effective date of the workflow changes. Previously submitted PTRs/Positions are not subject to any workflow change rules. If you have questions on the way a transaction is routing, it is advisable to check the current matrix. If the transaction seems to be routing inappropriately, please contact your Data Management representative.

**Resources**

For comprehensive training materials:

PTR: check the training section of the [Personnel Transaction Request site](https://cfo.asu.edu/recruitment). In this section, you will be able to read a training guide, watch a video or try a transaction yourself. These materials are another way to gain more knowledge about the PTR and they are also located in the Blackboard training course for security access.

Position: view a training video on Position Management at [https://cfo.asu.edu/recruitment](https://cfo.asu.edu/recruitment). The [Blackboard training course](https://cfo.asu.edu/recruitment) has even more training material available.

If you have questions, contact your Data Management Representative.