


Use this task to clone a template transaction. The cloning function is available when:

- A template transaction was denied by a Location Approver.
- A template transaction was cancelled by UCPC WFA Production.

Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > **Transaction Status**

Step	Action
1.	Use the Template Status page to search for cancelled or denied template transactions that you can clone, update and resubmit for processing. Template transactions must have a Transaction Status of Cancel or Denied to be cloned.
2.	You can narrow the search by the HR Review Status . Click the button to the right of the HR Review Status field. 

Transaction Status

The following transactions are pending, canceled or have been processed by Human Resources.

HR Review Status: (Dropdown menu open showing: All, Cancelled, My Transactions, Pending, Processed)

Transaction Type: (Dropdown menu open showing: All, My Transactions, Pending, Processed)

Transaction Status: (Dropdown menu open showing: All, My Transactions, Pending, Processed)

Business Unit:

Empl ID:

First Name:

Last Name:

Start Date From: To:



Group Box Header 1

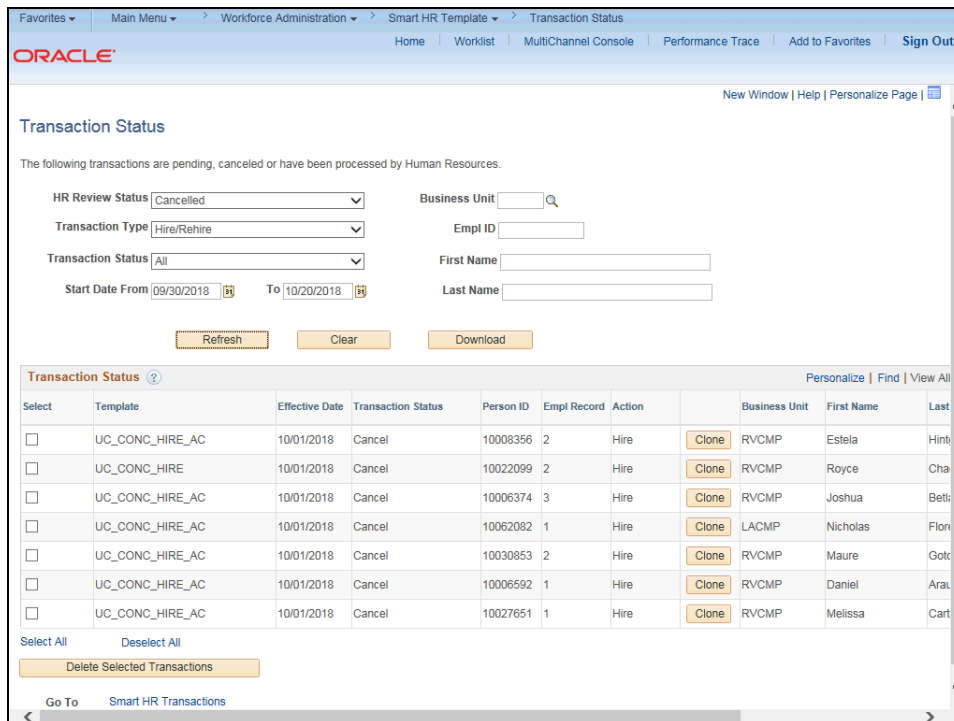
Select	Template	Effective Date	Transaction Status	Person ID	Empl Record	Action	Business Unit	First Name	Last Name
<input type="checkbox"/>									

Select All

Go To [Smart HR Transactions](#)

Step	Action
3.	For this example, click the Cancelled list item.
4.	You can also narrow the list by the transaction type. Click the button to the right of the Transaction Type field.

Step	Action
5.	For this example, click the Hire/Rehire list item. 
6.	The Start Date From field defaults a date that is 10 days prior to the current date. The Start Date To field defaults a date that is 10 days after the current date. The Effective Date of the transaction you are searching for must fall within these dates.
7.	Click the Refresh button. 



Step	Action
8.	<p>The template transactions that meet the search criteria appear. The Clone button is available only for transactions with a Transaction Status of Cancel or Denied.</p> <p>The Clone button appears when:</p> <ul style="list-style-type: none"> - A template transaction was denied by a Location Approver. Refer to the SS Smart HR Transactions page to view comments from the Approver about the denied transaction. - A template transaction was cancelled by UCPC WFA Production. Refer to the Reason for Cancellation column on this page to view comments from WFA Production about the cancelled transaction.
9.	Click the scroll bar.
10.	<p>When a transaction is cancelled, WFA Production enters a comment to explain why the transaction was cancelled. Template Initiators can View Comments and, if needed, Clone the transaction to resubmit it with necessary corrections.</p> <p>Note: To view comments about a transaction that was denied by a Location Approver you must navigate to the SS Smart HR Transactions page and review the Approver Comments field.</p>

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led or have been processed by Human Resources.

Business Unit

Empl ID

First Name

Last Name

To

Effective Date	Transaction Status	Person ID	Empl Record	Action	Business Unit	First Name	Last Name	Reason for Cancellation
10/01/2018	Cancel	10008356	2	Hire	RVCMP	Estela	Hintgen	View Comments
10/01/2018	Cancel	10022099	2	Hire	RVCMP	Royce	Chao	View Comments
10/01/2018	Cancel	10006374	3	Hire	RVCMP	Joshua	Betlachin	View Comments
10/01/2018	Cancel	10062082	1	Hire	LACMP	Nicholas	Flores	View Comments
10/01/2018	Cancel	10030853	2	Hire	RVCMP	Maure	Goto	View Comments
10/01/2018	Cancel	10006592	1	Hire	RVCMP	Daniel	Araujo	View Comments
10/01/2018	Cancel	10027651	1	Hire	RVCMP	Melissa	Carter	View Comments

Step	Action
11.	Click the View Comments link. View Comments

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Cancelled Transaction Comments

Comments


Cancellation Date: 7/2/18
Transaction #: T000014984

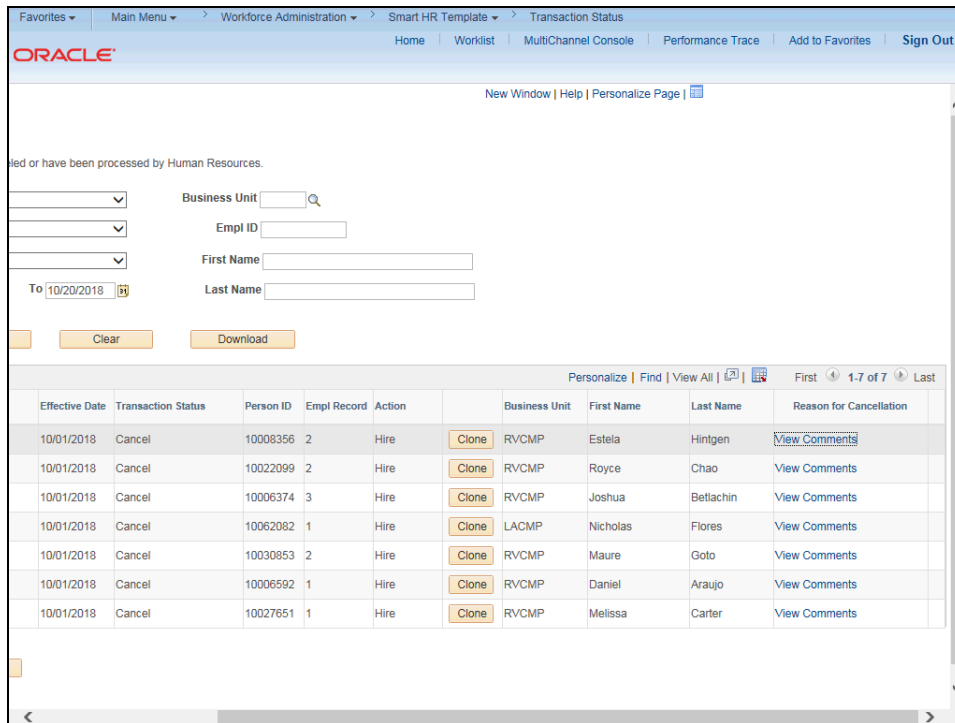
Please be advised this template transaction has been cancelled.

Reason for cancellation:
Advised to cancel per case 00214974.

If applicable, a revised transaction may be submitted through UCPath for processing.

Thank you,
UCPath Center

Step	Action
12.	Review the comment. This is helpful information for correcting the template transaction or identifying the supporting documentation that is needed.
13.	Click the Return button. 



ed or have been processed by Human Resources.

Business Unit

Empl ID

First Name

Last Name


To 10/20/2018

Effective Date	Transaction Status	Person ID	Empl Record	Action	Business Unit	First Name	Last Name	Reason for Cancellation
10/01/2018	Cancel	10008356	2	Hire	<input type="button" value="Clone"/> RVCMP	Estela	Hintgen	View Comments
10/01/2018	Cancel	10022099	2	Hire	<input type="button" value="Clone"/> RVCMP	Royce	Chao	View Comments
10/01/2018	Cancel	10006374	3	Hire	<input type="button" value="Clone"/> RVCMP	Joshua	Betlachin	View Comments
10/01/2018	Cancel	10062082	1	Hire	<input type="button" value="Clone"/> LACMP	Nicholas	Flores	View Comments
10/01/2018	Cancel	10030853	2	Hire	<input type="button" value="Clone"/> RVCMP	Maure	Goto	View Comments
10/01/2018	Cancel	10006592	1	Hire	<input type="button" value="Clone"/> RVCMP	Daniel	Araujo	View Comments
10/01/2018	Cancel	10027651	1	Hire	<input type="button" value="Clone"/> RVCMP	Melissa	Carter	View Comments

Step	Action
14.	Click the scroll bar.

The screenshot shows the Oracle UCPath 'Transaction Status' page. At the top, there are navigation menus and the Oracle logo. Below the header, there are search filters for HR Review Status (Cancelled), Transaction Type (Hire/Rehire), Transaction Status (All), and Start Date (09/30/2018 to 10/20/2018). There are also fields for Business Unit, Empl ID, First Name, and Last Name. Below the filters are 'Refresh', 'Clear', and 'Download' buttons. The main content is a table with columns: Select, Template, Effective Date, Transaction Status, Person ID, Empl Record, Action, Business Unit, First Name, and Last Name. The first row is selected, and the 'Clone' button is highlighted. Below the table are 'Select All', 'Deselect All', and 'Delete Selected Transactions' buttons. At the bottom, there is a 'Go To' button and a search bar.

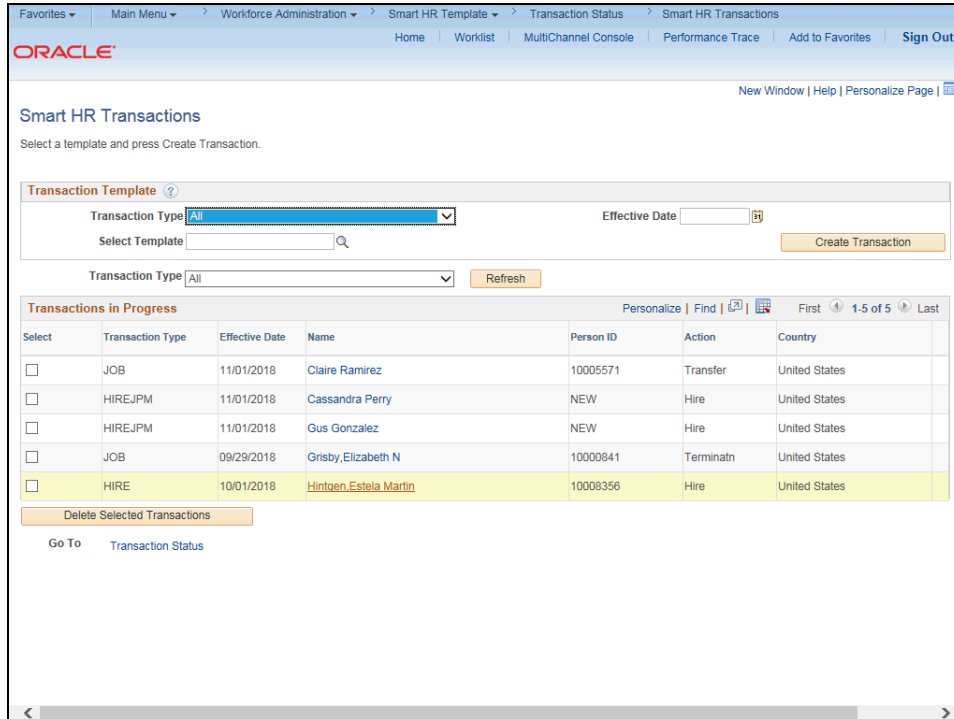
Select	Template	Effective Date	Transaction Status	Person ID	Empl Record	Action	Business Unit	First Name	Last
<input checked="" type="checkbox"/>	UC_CONC_HIRE_AC	10/01/2018	Cancel	10008356	2	Hire	RVCMP	Estela	Hint
<input type="checkbox"/>	UC_CONC_HIRE	10/01/2018	Cancel	10022099	2	Hire	RVCMP	Royce	Cha
<input type="checkbox"/>	UC_CONC_HIRE_AC	10/01/2018	Cancel	10006374	3	Hire	RVCMP	Joshua	Beti
<input type="checkbox"/>	UC_CONC_HIRE_AC	10/01/2018	Cancel	10062082	1	Hire	LACMP	Nicholas	Flori
<input type="checkbox"/>	UC_CONC_HIRE_AC	10/01/2018	Cancel	10030853	2	Hire	RVCMP	Maure	Got
<input type="checkbox"/>	UC_CONC_HIRE_AC	10/01/2018	Cancel	10006592	1	Hire	RVCMP	Daniel	Arau
<input type="checkbox"/>	UC_CONC_HIRE_AC	10/01/2018	Cancel	10027651	1	Hire	RVCMP	Melissa	Cart

Step	Action
15.	<p>Use the Clone button to copy the existing template information into a new template.</p> <p>For this example, clone the concurrent hire (academic) template for Estela Hintgen.</p> <p>Click the Clone button.</p> 
16.	<p>After the template transaction is cloned, the Clone button is no longer available.</p>

The screenshot shows the Oracle UCPath 'Transaction Status' page. At the top, there is a navigation bar with 'Home', 'Worklist', 'MultiChannel Console', 'Performance Trace', 'Add to Favorites', and 'Sign Out'. Below the navigation bar, the page title is 'Transaction Status'. A message states: 'The following transactions are pending, canceled or have been processed by Human Resources.' Below this message are several filters: 'HR Review Status' (Cancelled), 'Transaction Type' (Hire/Rehire), 'Transaction Status' (All), 'Start Date From' (09/30/2018) and 'To' (10/20/2018), 'Business Unit' (searchable), 'Empl ID', 'First Name', and 'Last Name'. There are 'Refresh', 'Clear', and 'Download' buttons. Below the filters is a table with columns: Select, Template, Effective Date, Transaction Status, Person ID, Empl Record, Action, Business Unit, First Name, and Last. The table contains 7 rows of transaction data, each with a 'Clone' button in the 'Action' column. Below the table are 'Select All', 'Deselect All', and 'Delete Selected Transactions' buttons. At the bottom, there is a 'Go To' link for 'Smart HR Transactions'.

Select	Template	Effective Date	Transaction Status	Person ID	Empl Record	Action	Business Unit	First Name	Last
<input type="checkbox"/>	UC_CONC_HIRE_AC	10/01/2018	Cancel	10008356	2	Hire	RVCMP	Estela	Hint
<input type="checkbox"/>	UC_CONC_HIRE	10/01/2018	Cancel	10022099	2	Hire	RVCMP	Royce	Cha
<input type="checkbox"/>	UC_CONC_HIRE_AC	10/01/2018	Cancel	10006374	3	Hire	RVCMP	Joshua	Beti
<input type="checkbox"/>	UC_CONC_HIRE_AC	10/01/2018	Cancel	10062082	1	Hire	LACMP	Nicholas	Flori
<input type="checkbox"/>	UC_CONC_HIRE_AC	10/01/2018	Cancel	10030853	2	Hire	RVCMP	Maure	Got
<input type="checkbox"/>	UC_CONC_HIRE_AC	10/01/2018	Cancel	10006592	1	Hire	RVCMP	Daniel	Arau
<input type="checkbox"/>	UC_CONC_HIRE_AC	10/01/2018	Cancel	10027651	1	Hire	RVCMP	Melissa	Cart

Step	Action
17.	To access the cloned template navigate to the Smart HR Transactions page. Click the Smart HR Transactions link. Smart HR Transactions



Step	Action
18.	<p>The Smart HR Transactions page only displays the transaction that you submit. Therefore:</p> <ul style="list-style-type: none"> • If you clone a transaction that you didn't originally submit, only the cloned transaction displays in the Smart HR Transactions page. • If you clone a transaction that you did originally submit, both the original and the cloned transaction displays in the Smart HR Transactions page.
19.	<p>The cloned template appears in the Transactions in Progress section. Click the Name link to open the template and update as needed.</p> <p>For this example, click the Hintgen, Estela Martin link.</p> <p>Hintgen, Estela Martin</p>

Smart HR Transactions
Enter Transaction Details

Name Estela Hintgen

The following transaction details are required.

Template Academic Concurrent Hire/Inter Location Transfer

Organizational Relationship Employee

*Employee ID 10009356 x Q Estela Hintgen


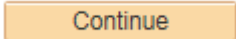
*Effective Date 11/01/2018

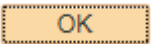
Action Hire

*Reason Code Academic Concurrent Hire

*Address Format United States

Continue Cancel

Step	Action
20.	Update the fields on the Enter Transaction Details page as needed. For this example, the Reason Code must be updated.
21.	Click the button to the right of the Reason Code field. 
22.	For this example, click the Transfer-Intra Location list item.
23.	Click the Continue button. 

Step	Action
24.	Click the OK button. <div style="text-align: center; margin-top: 10px;">  </div>

Step	Action
25.	Update the employee's Personal Data as needed.
26.	Click the scroll bar.

Step	Action
27.	Click in the Comments field.
28.	Enter the desired information into the Comments field. For this example, enter Resubmit cancelled transaction with Action Reason of Transfer-Intra Location..
29.	Click the scroll bar.

Smart HR Transactions
Enter Transaction Information

Click here to Hide Header Details

Template: UC_CONC_HIRE_AC Name: Estela Hintgen
Effective Date: 11/01/2018 Action/Action Reason: HIR/TIL (Transfer-Intra Location)
Employee ID: 10008356 Employee Record:

Personal Data | Job Data | Earns Dist

Employee Information

Primary Name - English

*First Name Middle Name
*Last Name Name Suffix

Birthday Information

Date of Birth

Person Education Level


Highest Education Level

Person National ID United States

National ID Type National ID

Person Address 01 - United States

*Address Type Address Line 1
Address Line 2 City
State Postal Code

Step	Action
30.	Click the Job Data tab. 

Smart HR Transactions
Enter Transaction Information

Click here to Hide Header Details

Template: UC_CONC_HIRE_AC Name: Estela Hintgen
Effective Date: 11/01/2018 Action/Action Reason: HIR/TIL (Transfer-Intra Location)
Employee ID: 10008356 Employee Record:

Personal Data | Job Data | Earns Dist

Employee Information

Work Location - Position Data

*Position Number

Work Location - Job Fields

Business Unit Department
Location Code Establishment ID

Job Information - Job Code

Job Code

Job Information - United States

FLSA Status

Job Labor - Union Code

Union Code

Job Information - Reporting Information

Reports To Position Number

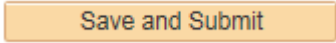
Job Information - Employee Classification

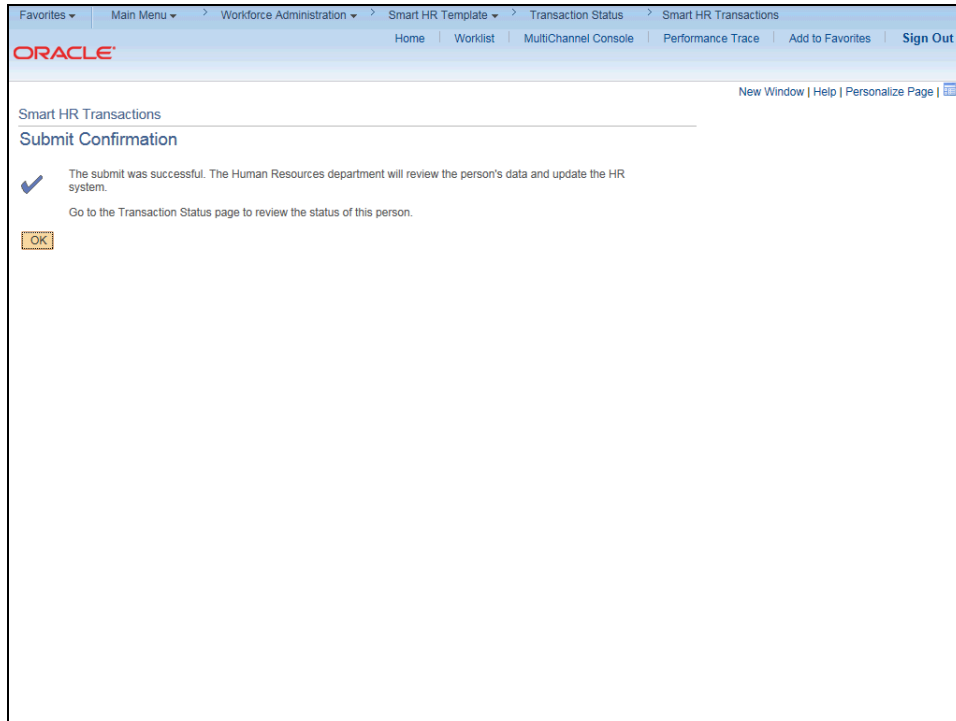
Step	Action
31.	Update the employee's Job Data as needed.
32.	Click the scroll bar.


The screenshot displays the Oracle UCPath interface for a job transaction. The breadcrumb trail at the top reads: Favorites > Main Menu > Workforce Administration > Smart HR Template > Transaction Status > Smart HR Transactions. The page title is 'Job Information - Reporting Information'. The 'Reports To Position Number' is 40007741. The 'Job Information - Employee Classification' section shows 'Employee Classification' and 'Classified/Unclassified' as 'Professional & Support Staff'. The 'Job Information - Standard Hours' section shows 'Standard Hours' as 19.600000 and 'FTE' as 0.490000. The 'UC Job Data' section includes 'Academic Duration of Appt', 'Location Use End Date', 'Location Use Type', and 'Post Docs Anniversary Date'. The 'Job - Salary Plan' section shows 'Salary Administration Plan' as STRV and 'Salary Grade' as 2. The 'Job Compensation - Pay Components' table has one row with 'Comp Rate Code' UCHRLY, 'Compensation Rate' 24.180000, 'Compensation Frequency' H, and 'Rate Code Source' Manual. The 'Job Compensation - Payroll Currency and Frequency' section shows '*Compensation Frequency' as H. The 'Work Location - Expected Job End Date' section shows 'Expected Job End Date' as 12/31/2018 and an unchecked 'End Job Automatically' checkbox. At the bottom, there are buttons for 'Save and Submit', 'Save for Later', 'Cancel', and 'Supporting documents'.

Step	Action
33.	Click the scroll bar.

Step	Action
34.	Click the Earns Dist tab. <div style="border: 1px solid gray; padding: 5px; display: inline-block; margin-top: 10px;">Earns Dist</div>

Step	Action
35.	Update the employee's Job Earnings Distribution information as needed.
36.	Use the Supporting Documents link to add attachments as needed.
37.	Click the Save and Submit button. 



Step	Action
38.	Click the OK button. 

Transaction Template

Transaction Type: All Effective Date: []

Select Template: [] Create Transaction

Transaction Type: All Refresh

Transactions in Progress

Select	Transaction Type	Effective Date	Name	Person ID	Action	Country
<input type="checkbox"/>	JOB	11/01/2018	Claire Ramirez	10005571	Transfer	United States
<input type="checkbox"/>	HIREJPM	11/01/2018	Cassandra Perry	NEW	Hire	United States
<input type="checkbox"/>	HIREJPM	11/01/2018	Gus Gonzalez	NEW	Hire	United States
<input type="checkbox"/>	JOB	09/29/2018	Grisby, Elizabeth N	10000841	Terminatn	United States
<input type="checkbox"/>	HIRE	11/01/2018	Tam Triet Ngo Duc	10008356	Hire	United States

Delete Selected Transactions

Go To Transaction Status

Step	Action
39.	You have cloned a template transaction that has been cancelled or denied. End of Procedure.