

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

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



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| 5. | For this example, click the Hire/Rehire list item. |
| | Hire/Rehire |
| 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. |
| | Refresh |



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| 8. | 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 . |
| | The Clone button appears when: 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. | 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. 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. |



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| 11. | Click the View Comments link. |
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| Iransaction #: 1000014984 | |
| 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, | |
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| 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. |
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| 14. | Click the scroll bar. |



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



| Home Worklist MultiChannel Console Performance Trace Add to f Image: Console Performance Trace Add to f New Window Help Image: Console New Window Help Transaction Status Image: Console New Window Help Transaction Status Cancelled Image: Console New Window Help Transaction Type Image: Console Image: Console Transaction Status All Image: Console Image: Console Start Date From 09/30/2018 To 10/20/2018 Last Name | vorites Sign |
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| 17. | To access the cloned template navigate to the Smart HR Transactions page. |
| | Click the Smart HR Transactions link. Smart HR Transactions |



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| Effective Date Name | | Person ID | Action | Country |
| 11/01/2018 Claire R | mirez | 10005571 | Transfer | United States |
| 11/01/2018 Cassand | ra Perry | NEW | Hire | United States |
| 11/01/2018 Gus Gor | zalez | NEW | Hire | United States |
| 09/29/2018 Grisby,E | izabeth N | 10000841 | Terminatn | United States |
| 10/01/2018 Hintgen, | Estela Martin | 10008356 | Hire | United States |
| | 11/01/2018 Gus Gon. 09/29/2018 Grisby,El 10/01/2018 Hintgen.E | 11/01/2018 Gus Gonzalez 09/29/2018 Grisby,Elizabeth N 10/01/2018 Hintgen,Estela Martin | 11/01/2018 Gus Gonzalez NEW 09/29/2018 Grisby,Elizabeth N 10000841 10/01/2018 Hintgen,Estela Martin 10008356 | 11/01/2018 Gus Gonzalez NEW Hire 09/29/2018 Grisby, Elizabeth N 10000841 Terminatn 10/01/2018 Hintgen, Estela Martin 10008356 Hire |

| Step | Action |
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| 18. | The Smart HR Transactions page only displays the transaction that you submit. Therefore: 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. | The cloned template appears in the Transactions in Progress section. Click the Name link to open the template and update as needed. For this example, click the Hintgen,Estela Martin link. <u>Hintgen,Estela Martin</u> |



| Favorites - | Main Menu $ eq$ Workforce Administration $ eq$ Smart HR Template $ eq$ | > Transaction Status | > Smart HR T | ansactions |
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| | Name Estela Hintgen | | | |
| The following tr | saction details are required. | | | |
| | Template Academic Concurrent Hire/Inter Location Transfer | | | |
| Orga | zational Relationship Employee | | | |
| | *Employee ID 10008356 × Q Estela Hintgen | | | |
| | *Effective Date 11/01/2018 | | | |
| | Action Hire | | | |
| | *Reason Code Academic Concurrent Hire V | | | |
| | *Address Format United States | | | |
| Continue | Cancel | | | |
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| Step | Action |
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| 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. |



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| Name Estela Hintgen | |
| he following transaction details are required. | |
| Template Academic Concurrent Hire/Inter Location Transfer | |
| Organizational Relationship Employee | |
| *Employee ID 1000 Message | |
| *Effective Date 11/0 | - |
| Person ID 10008356 already exists in the system for Estela Hintgen. (1007,61) | |
| Select OK to continue the hire process with this Person ID. Select Cancel to enter a new *Reason Code Aca Person ID. | |
| *Address Format Linit | |
| | |
| Continue Cancel | |
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| 24. | Click the OK button. |
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| | | Catala I Satara | | | | |
| Effective Date: 11/01/2018 | Name: Action/Action Reason: | Estela Hintgen HIR/TIL (Transfer-Intra Location) | | | | |
| Employee ID: 10008356 | Employee Record: | | | | | |
| Personal Data Job Data Earns Dist | | | | | | |
| Employee Information | | | | | | |
| Primary Name - English | | | | | | |
| *First Name Estela | | Middle Name | | | | |
| *Last Name Hintgen | | Name Suffix | \checkmark | | | |
| Birthday Information | | | | | | |
| Date of Birth 08/18/1987 | | | | | | |
| Person Education Level | | | | | | |
| Highest Education Level G | | | | | | |
| Person National ID United States | | | | | | |
| National ID Type PR | | National ID 614676577 | | | | |
| Person Address 01 - United States | | | | | | |
| *Address Type Home | \checkmark | Address Line 1 6011 MATHESC | ON DR | | | |
| Address Line 2 | | City RIVERSIDE | | | | |
| State CA | | Postal Code 92507 | | | | |
| Denser Dhane Number | - | n terutor antā 🕮 erus | @ | A | | ~ |



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

| erson Address 01 - United States | | | | | |
|---|------------------------|-----------------------|--------------|----------|---|
| *Address Type Home | Ad | dress Line 1 6011 MAT | HESON DR | | |
| Address Line 2 | | City RIVERSI |)E | | |
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| erson Phone Number | Personalize Find \ | /iew All 🗖 🔣 | First 🕚 1 of | 1 🕑 Last | |
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| Step | Action |
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| 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. |



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| emplate: | UC_CONC_HIR 11/01/2019 | E_AC | Name: Action/Action F | E Baseon: H | Estela Hintgen | ra Location) | | | | |
| nployee ID: | 10008356 | | Employee Reco | ord: | Into The (Transfer-Int | ia Location) | | | | |
| Dereenal Dat | ta Job Data | Forma Dia | * | | | | | | | |
| mployee In | formation | Editis Dis | | | | | | | | |
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| i innary iva | *First Name Est | tela | | | Middle | Name | | | | |
| | | | | | moure | | | | | |
| | *Last Name Hir | ntgen | | | Name S | Suffix V | | | | |
| Birthday In | formation | | | | | | | | | |
| | Date of Birth 08/ | 18/1987 | | | | | | | | |
| Person Edu | cation Level | | | | | | | | | |
| Highest Ed | lucation Level G | | | | | | | | | |
| Person Nat | ional ID United ! | States | | | | | | | | |
| Na | tional ID Type PR | 1 | | | Natio | nal ID 614676577 | | | | |
| Person Add | dress 01 - United | I States | | | | | | | | |
| * | Address Type Ho | me | \checkmark | | Address L | Line 1 6011 MATHESON D | R | | | |
| А | ddress Line 2 | | | | | City RIVERSIDE | | | | |
| | State CA | | | | Postal | Code 92507 | | | | |
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| 30. | Click the Job Data tab. |
| | Job Data |

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| | Estala Liisteen | | | |
| Effective Date: 11/01/2018 Action/Action Reaso | n: HIR/TIL (Transfer-Intra Location) | | | |
| Employee ID: 10008356 Employee Record: | | | | |
| Personal Data Job Data Earns Dist | | | | |
| Employee Information | | | | |
| Work Location - Position Data | | | | |
| *Position Number 40024805 | | | | |
| Work Location - Job Fields | | | | |
| Business Unit RVCMP | Department D01004 | | | |
| Location Code P5194 | Establishment ID UCR | ٩ | | |
| Job Information - Job Code | | | | |
| Job Code 004921 | | | | |
| Job Information - United States | | | | |
| FLSA Status Nonexempt | | | | |
| Job Labor - Union Code | | | | |
| Union Code 99 | | | | |
| Job Information - Reporting Information | | | | |
| Reports To Position 40007741 Number | | | | |
| Job Information - Employee Classification | | | | |



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

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| Rep | orts To Positio Numbe | n 40007741 er | | | | | | | | ^ |
| Job Infor | mation - Emp | loyee Classification | | | | | | | | |
| Employe | ee Classificatio | n | | Classified/U | Inclassified Profes Ind | sional & Support | t Staff 🔽 | | | |
| Job Infor | mation - Stan | dard Hours | | | | | | | | |
| | Standard Hour | s 19.600000 | | | FTE | 0.490000 | | | | |
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| Acad | emic Duration o App | of | ~ | Location U | se End Date | 81 | | | | |
| Lo | cation Use Typ | e | ~ | Post Docs / | Anniversary Date | ij | | | | - 1 |
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| Job Com | pensation - Pa | ay Components | | Personalize Fir | nd View All 💷 | 📑 🛛 First 🔇 |) 1 of 1 🤅 | Last | | |
| Comp F | Rate Code | Compensation Rate | Compensation Free | uency | Rate Code Source | | | | | |
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| Job Com | pensation - Pa | ayroll Currency and | Frequency | | | | | | | |
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| 33. | Click the scroll bar. |



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| Effective Date | : 11/01/2018 | Action/Action Reason: | HIR/TIL (Transfer-Intra Location) | | | |
| imployee ID: | 10008356 | Employee Record: | | | | |
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| Employee Ir | nformation | | | | | |
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| *P(| osition Number 40024805 | ٩ | | | | |
| Work Loca | ation - Job Fields | | | | | |
| | Business Unit RVCMP | | Department D01004 | | | |
| | Location Code P5194 | | Establishment ID UCR | ٩ | | |
| Job Inform | nation - Job Code | | | | | |
| | Job Code 004921 | | | | | |
| Job Inform | nation - United States | | | | | |
| | FLSA Status Nonexempt | \checkmark | | | | |
| Job Labor | - Union Code | | | | | |
| | Union Code 99 | | | | | |
| Job Inform | nation - Reporting Informa | ition | | | | |
| Repo | Autor | | | | | |
| Job Inform | nation - Employee Classifi | cation | | | | |

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| 34. | Click the Earns Dist tab. | | | |
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| Employee ID: 100083 | 356 | Employee R | ecord: | | | | | | | | |
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| 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. | | | | | | |
| | Save and Submit | | | | | | |

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| Subm | it Con | firmation | | | | | | | | | | | | | | | | |
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| | The subr system. | nit was succes | sful. Th | ie Human | Resourc | es departm | ent will rev | iew the per | son's d | ata and upda | ate the HR | | | | | | | |
| | Go to the | Transaction S | Status p | age to rev | riew the s | status of this | s person. | | | | | | | | | | | |
| OK | | | | | | | | | | | | | | | | | | |
| OIL | | | | | | | | | | | | | | | | | | |
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| Step | Action |
|------|-----------------------------|
| 38. | Click the OK button. |
| | OK |



| Transact | tion Template 😗 | | | | | |
|----------|---------------------------|----------------|--------------------|----------------|------------------|-------------------------|
| | Transaction Type 🗚 | | \sim | Effective Date | 31 | |
| | Select Template | | ٩ | | | Create Transaction |
| | Transaction Type All | | ✓ Refresh | | | |
| Fransact | tions in Progress | | | Personaliz | e Find 💷 🔜 | First 🕚 1-5 of 5 🕑 Last |
| elect | Transaction Type | Effective Date | Name | Person ID | Action | Country |
| | JOB | 11/01/2018 | Claire Ramirez | 10005571 | Transfer | United States |
| | HIREJPM | 11/01/2018 | Cassandra Perry | NEW | Hire | United States |
|] | HIREJPM | 11/01/2018 | Gus Gonzalez | NEW | Hire | United States |
|] | JOB | 09/29/2018 | Grisby,Elizabeth N | 10000841 | Terminatn | United States |
|] | HIRE | 11/01/2018 | Tam Triet Ngo Duc | 10008356 | Hire | United States |
| De | lete Selected Transaction | 15 | | | | |

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