Job Aid: Manage Job Phase II

This document outlines the process of how to submit a transaction using **Manage Job**. It outlines the Approval Workflow process, including notification emails sent to requesters and approvers, the different transaction statuses, and actions involved in location transactions. The Manage Job approval chain varies by location and uses fluid approvals.

Navigation: Workforce Administration > Manage Job (tile) > **Search Existing**

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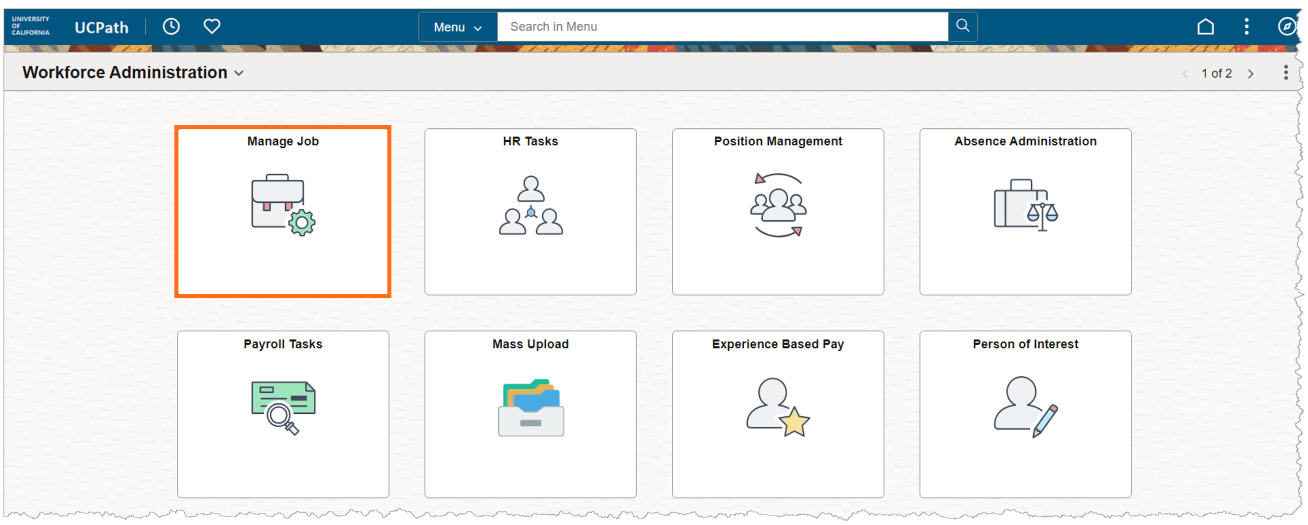
Manage Job

Location transactors with the new initiator role **ULSHR_HR_MODERN_JOB_INIT** (provisioned at the location) will have access to the **Manage Job Tile** and the **Create Job Action** button enabled.

Location transactors with access to current or classic **Job Data** or with the following roles will have access to the new **Manage Job** tile.

- **ULSHR_HR_ WFA_INQUIRY**,
- **ULSHR_HR_ WFA_INQUIRY_NO_PII**
- **ULSHR_HR_JOBDATA_NO_COMP**

Click the **Manage Job** tile to navigate to the **Search Existing** component.



In **Manage Job**, use the **Search Existing** component to search using **Search Criteria**, including:

- Empl ID
- Empl Record
- Name
- Legal Last Name
- Legal First Name
- Legal Middle Name
- HR Status
- Payroll Status
- Position Number
- Business Unit
- Department
- Job Code

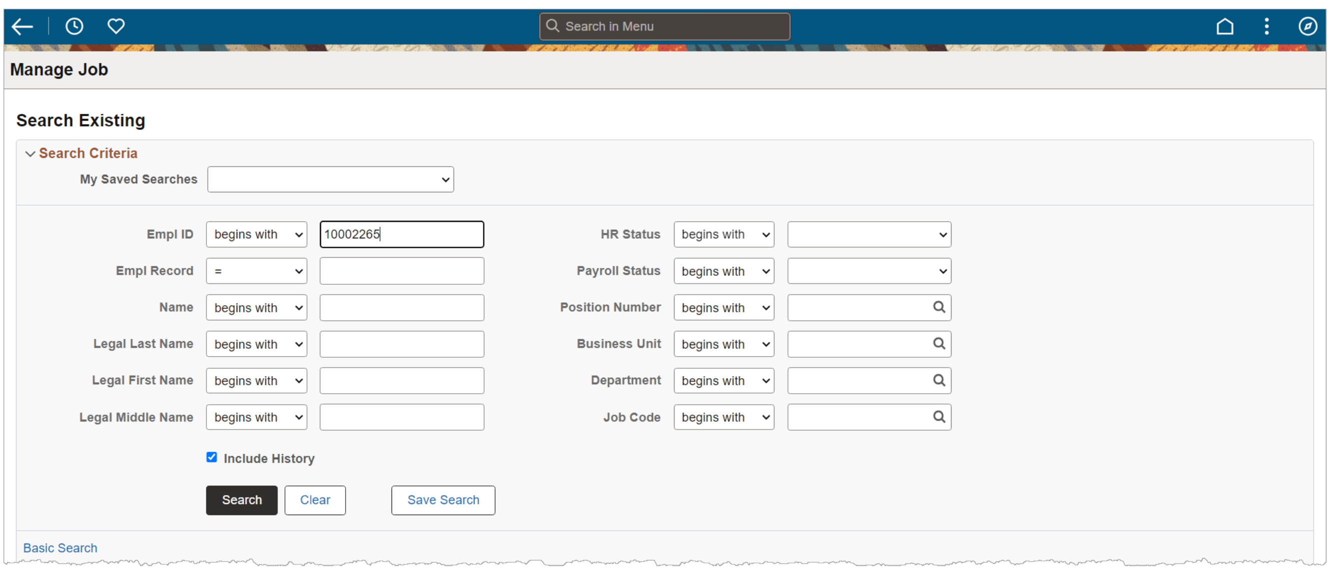
Search Existing

Enter the corresponding data in the respective field to search for an individual person's record or an entire Business Unit. For example, you can search for a person's records using an **Empl ID**, **Name**, **Legal Last Name**, **Legal First Name**, or **Legal Middle Name**. Searching by **Name** alone may not yield any results.

In addition, you can search for a person's record or Business Unit's records using a combination of search parameters, including **HR Status**, **Payroll Status**, **Position Number**, **Business Unit**, **Department**, and **Job Code**.

For example, you can search for an employee using an **Empl ID**.

Enter the employee's ID in the **Empl ID** field and click the **Search** button. You should check the **Include History** check box to include current and future job history rows. If the check box is unchecked, search results will display at the top of the stack row.



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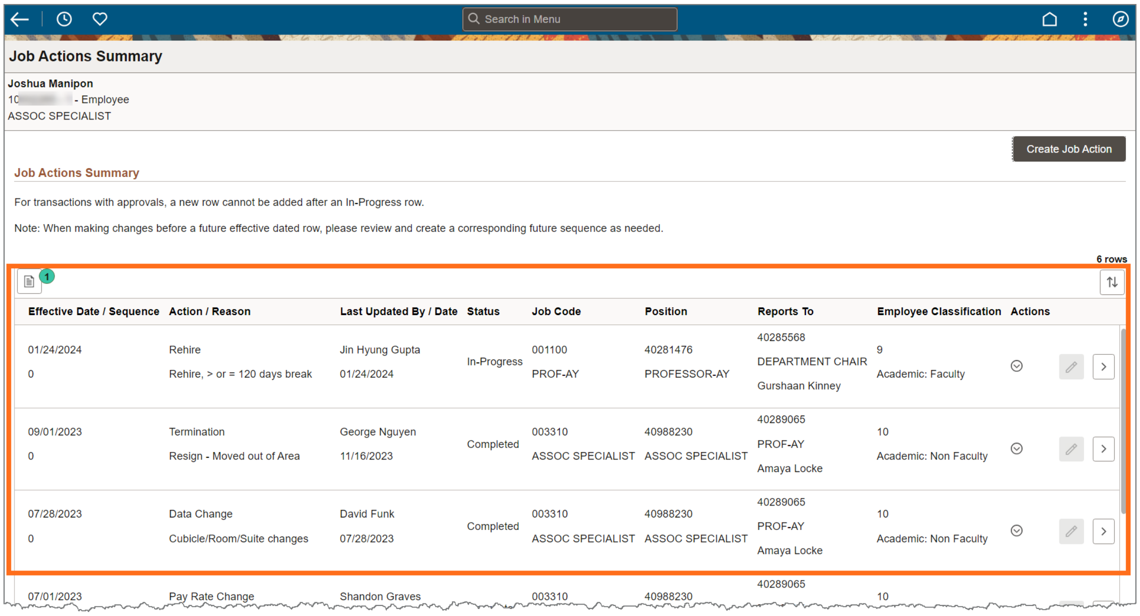
Job Action Summary

The search results display on the **Job Action Summary** page with the current row at the top of the stack and display in a horizontal row beneath the **Search Criteria** component.



If you do not see the **Create Job Action** button, your location has not provisioned the new initiator role.

> ⚠ Transactors with the new initiator role **(ULSHR_HR_MODERN_JOB_INIT)**, will see the **Create Job Action** button and can update or make changes from **Job Action Summary**.
>
> ⚠ Transactors without the new initiator role **(ULSHR_HR_MODERN_JOB_INIT)**, **Create Job Action** button will not be visible and the results in the **Job Action Summary** page will be read-only.

Notes

Click the **Notes** icon to display the **Job Data Notepad**. The note icon indicates one note available.

The notepad displays a record of all correct history actions taken on per normal business process.

> ⚠ Viewing notes requires a specific location role. Not all locations grant this access.

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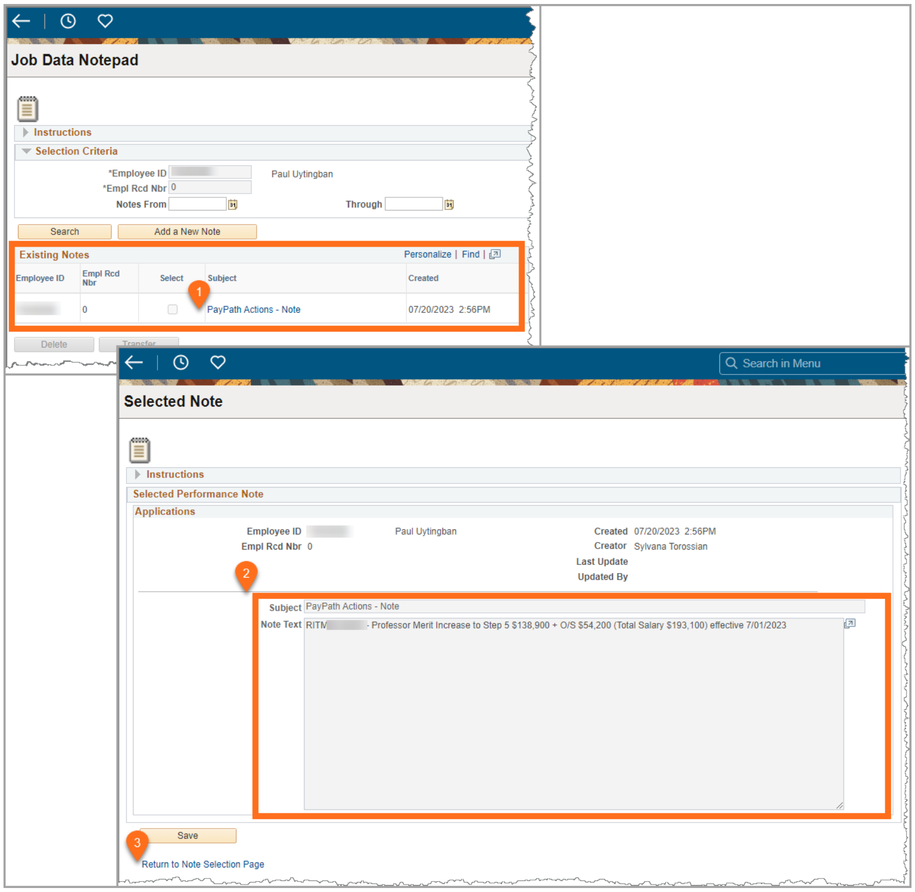
To view the details of a specific note, click the link in its subject. The **Job Data Notepad** displays any correct action taken per normal business process. To review the **Note Text**, click the link in the **Subject**.

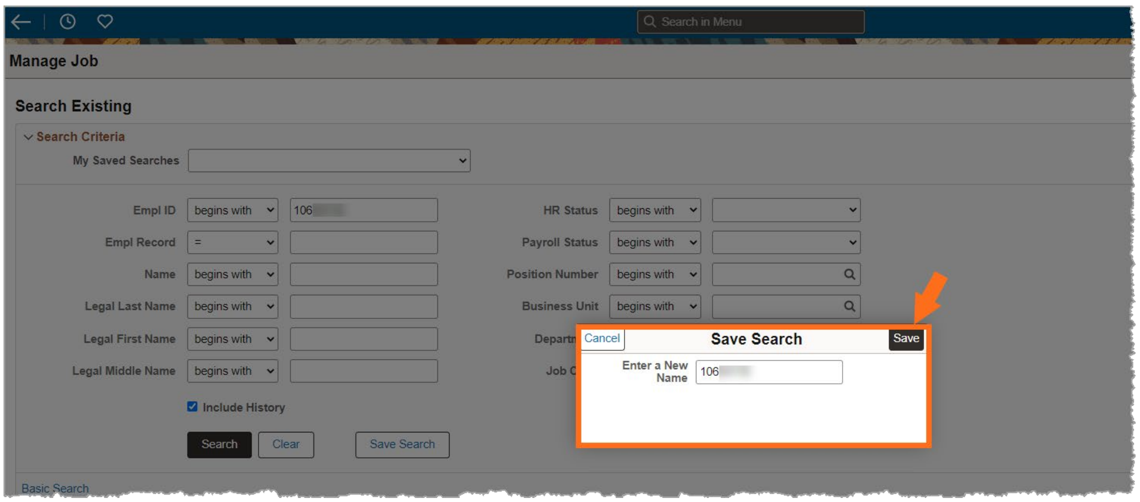


Click the **Return to Note Selection** link to return to the **Job Data Notepad** page.

To return to the **Job Action Summary** page, click the back arrow at the top of the page.

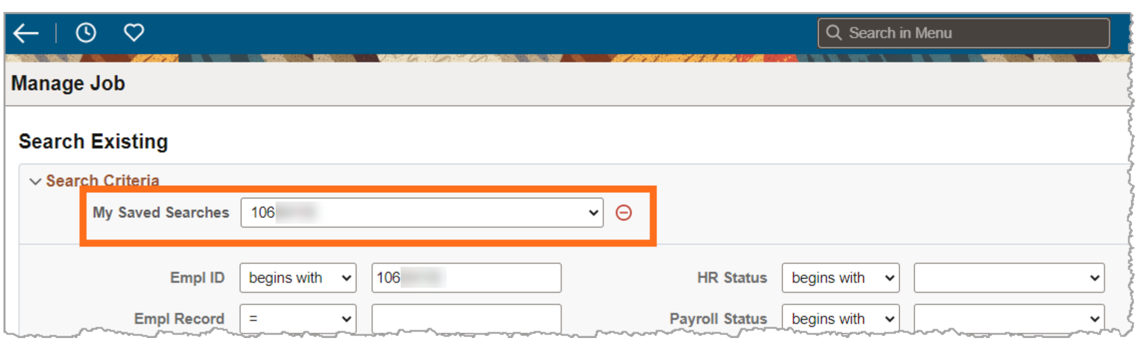
Save Search

To save the search previously performed, click the **Save Search** button. A pop-up window with a prompt to **Enter a New Name** displays. You can enter a name in the field or click save to accept the default text.



My Saved Searches

A saved search displays in the **My Saved Searches** drop-down on the **Manage Job** page.



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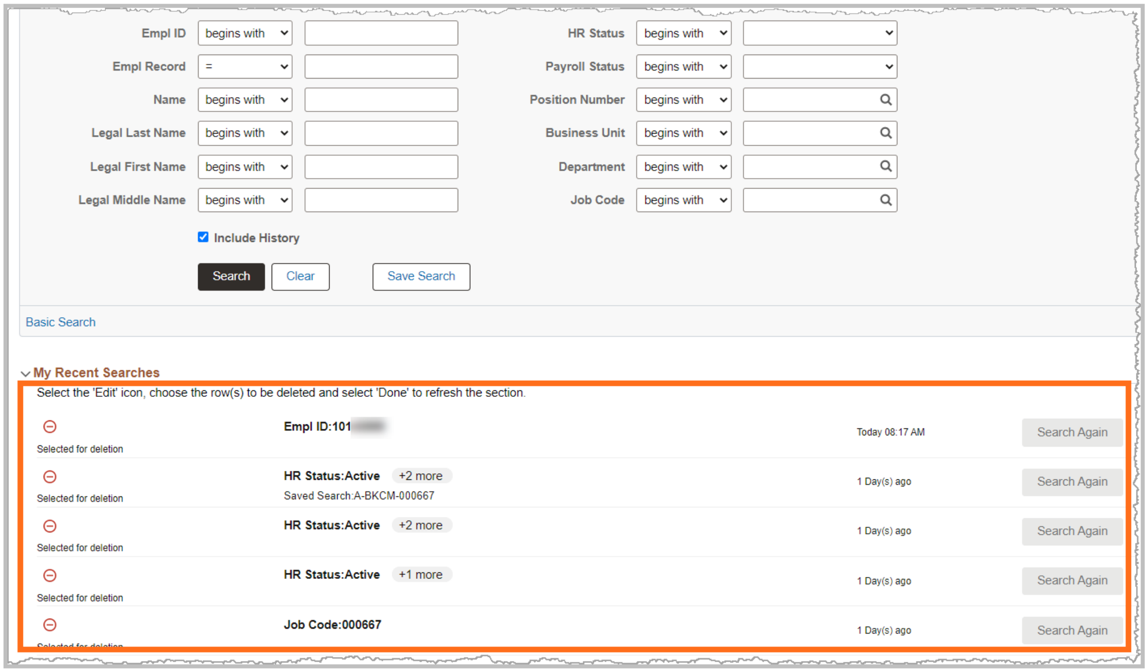
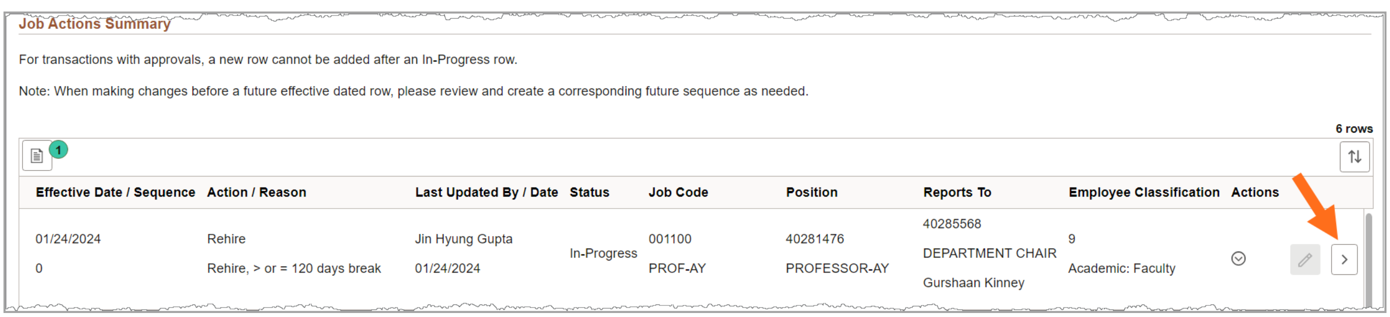
My Recent Searches

A list of **Recent Searches** will be displayed below the **Search Criteria** component on the **Manage Job** page.



To delete **My Recent Searches**, click **Edit** (pencil icon), click the delete button, and then click **Done**.

To review the employee's job data, click on the "**>**" icon to access the **Job detail** page.



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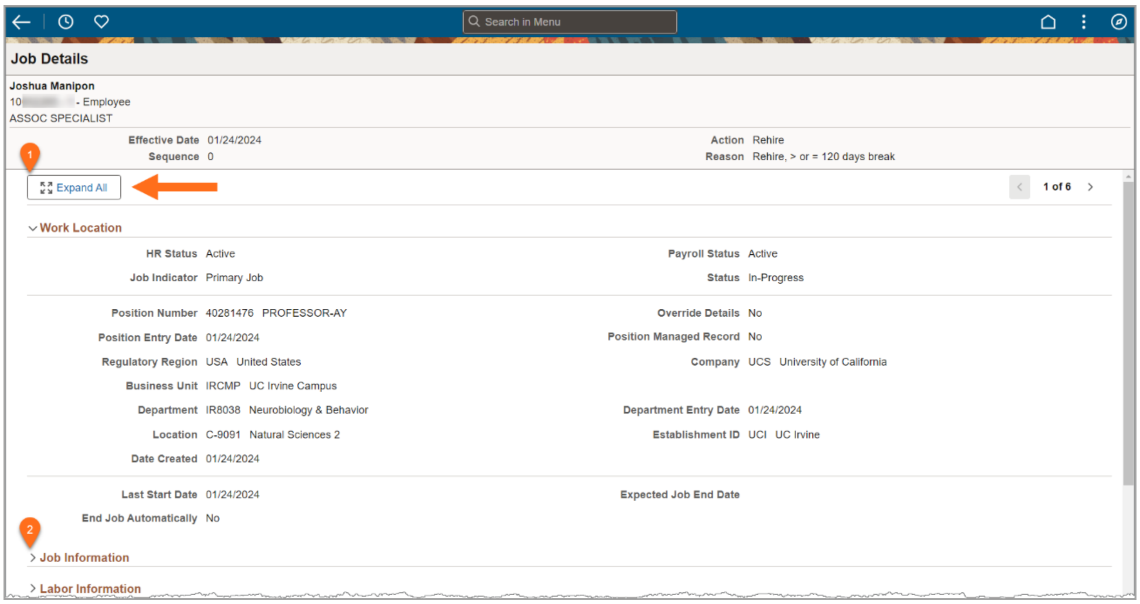
Job Details

The **Job Details** page is in read-only view and displays employee information by category, **Work Location**, **Job Information**, **Labor Information**, **Salary and Compensation**, **Payroll**, **Employment Data**, **Benefits Program**, **UC Job Data**, **Attachments**, **Validate**, and **Summary**.

Click the **Expand All** button to display all data from each category and click **Collapse All** to minimize all the categories. A transactor can expand or collapse each category by clicking on each category.

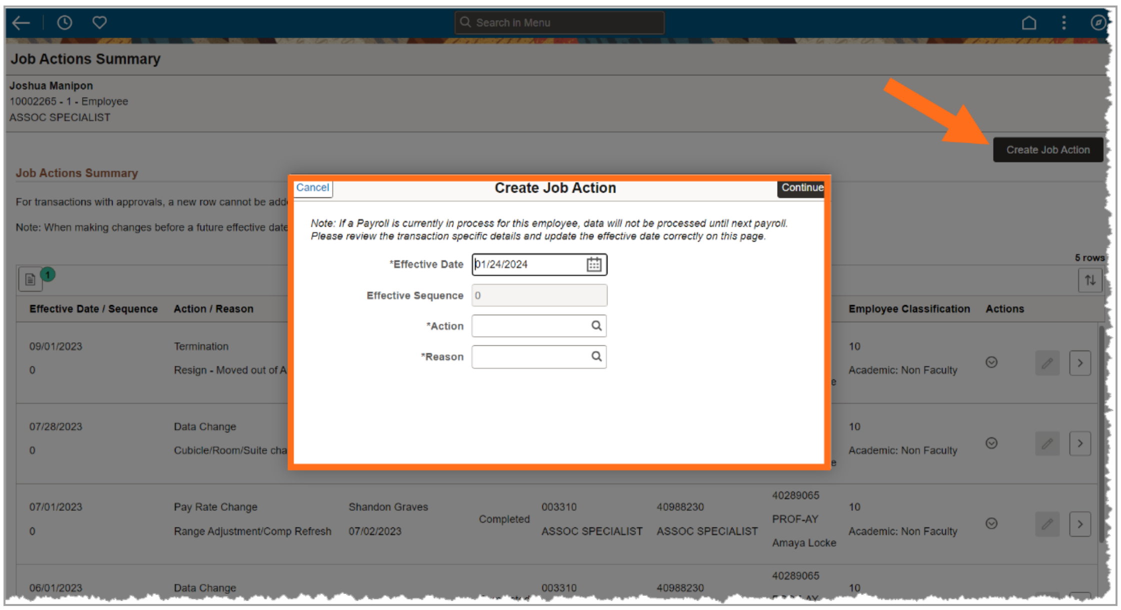


Click the back button to navigate back to the **Job Action Summary** page from the **Job Details** page.

Create Job Action

Create Job Action does not support entering transactions prior to the latest effective date row. This means transactors can enter current and future dated transactions. Historic rows cannot be entered using **Create Job Action**.

The **Create Job Action** button is enabled for transactors granted the new initiator role **(ULSHR_HR_MODERN_JOB_INIT)** provisioned at the location.



Click the **Create Job Action** button to enter the ***Action** and ***Reason** for an employee record. The **Effective Sequence** field is grayed out and displays a number starting out with "**0**". Entries entered using **Job Data** Modernizations with the same **Effective Date** will be effective sequenced.

Select or enter the ***Action** and ***Reason** codes. To search, use the lookup function to select the appropriate ***Action** and ***Reason** code from the lookup list.

⚠ A hard error will display if a disallowed ***Action** is entered in the ***Action** field, preventing the transactor from proceeding until a correct entry is made.

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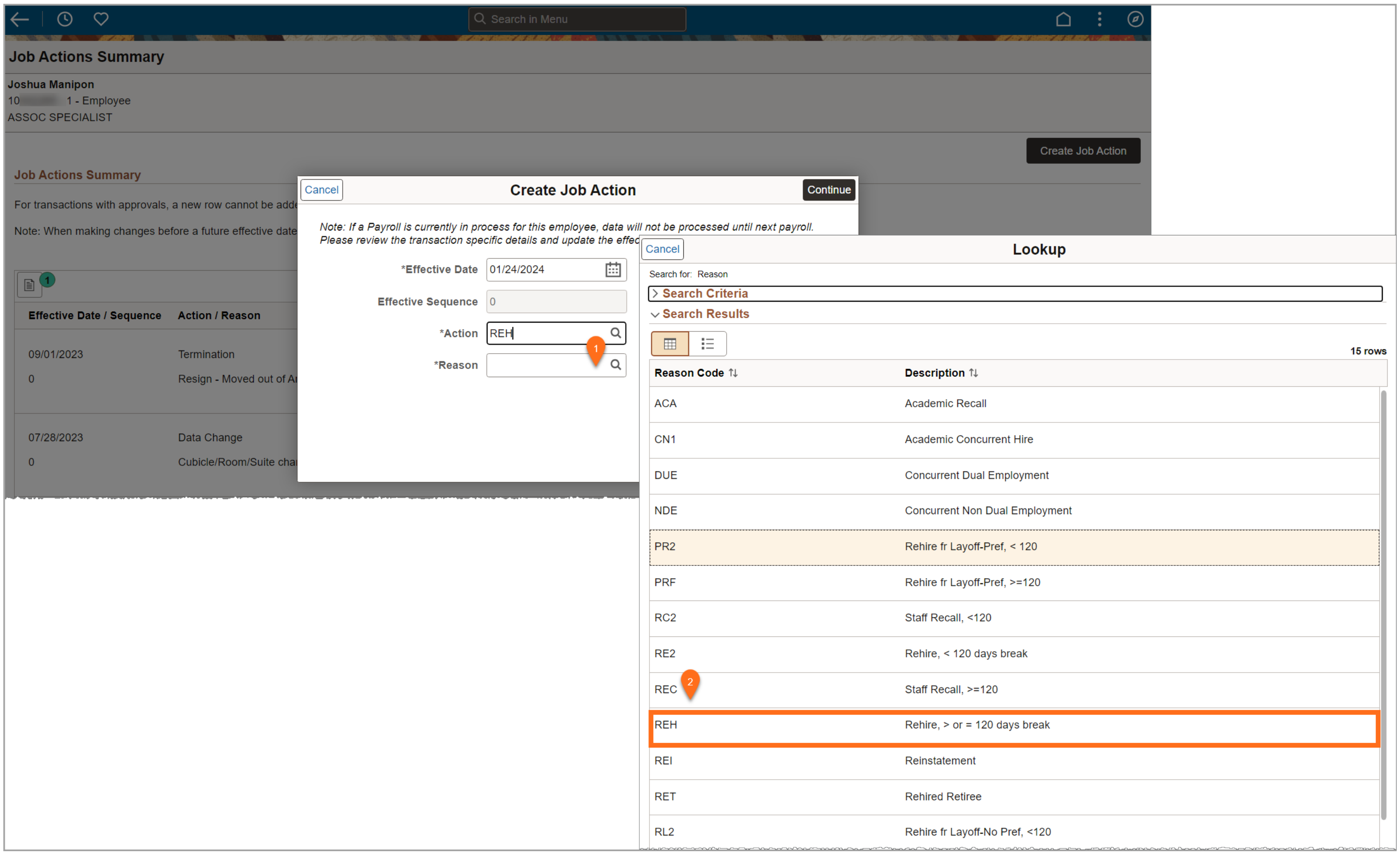
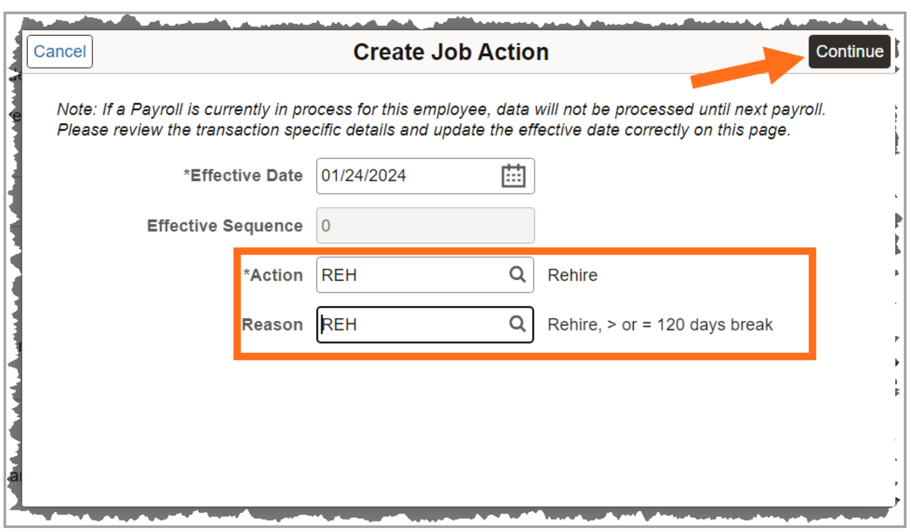


Select or enter an ***Action** and ***Reason**.



In this example, ***Action** **REH** (Rehire) and ***Reason** **REH** (Rehire,> or = 120 days break) have been entered.

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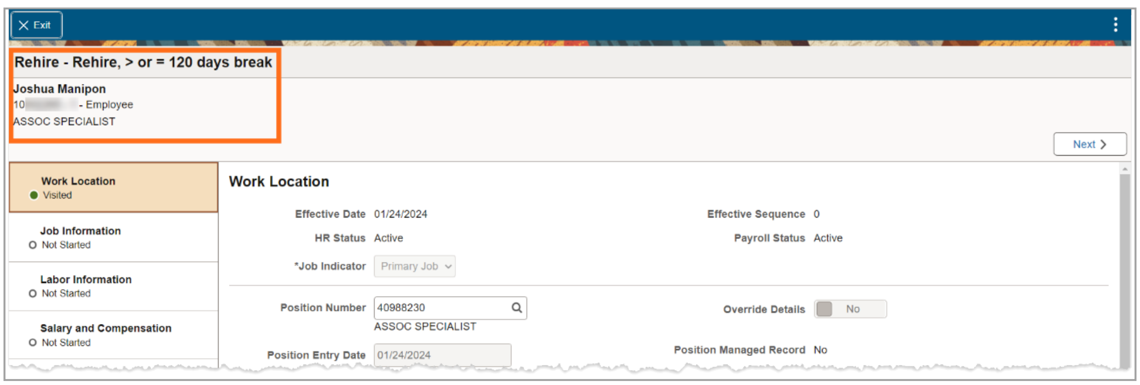
Click the **Continue** button to proceed with relevant data fields in the **Job Data** using the Activity Guides (AG).

Work Location

The **Work Location** page in modernized **Job Data** displays the employee's **name**, **current position**, ***Action**, and ***Reason** at the top.

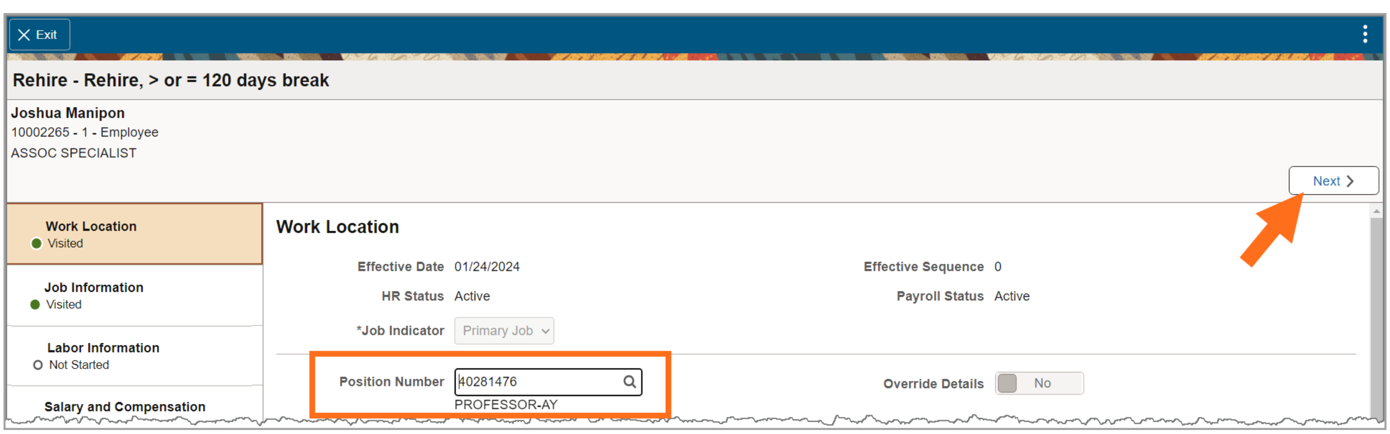
There is no requirement to navigate sequentially or view all activity guides. Transactors can access the guides in any order and after making an entry, can **Validate** and **Submit** the transaction.

Select fields in **Work Location** are enabled for entry, while some are grayed out. In this example, where the ***Action** and ***Reason** are for **Rehire – Rehire, > or = 120 days break**. The employee's **Name**, **Organizational Relationship**, and **Business Title** are displayed at the top of the page.



In this example, we are rehiring the employee into a new position with a different **Position Number**.

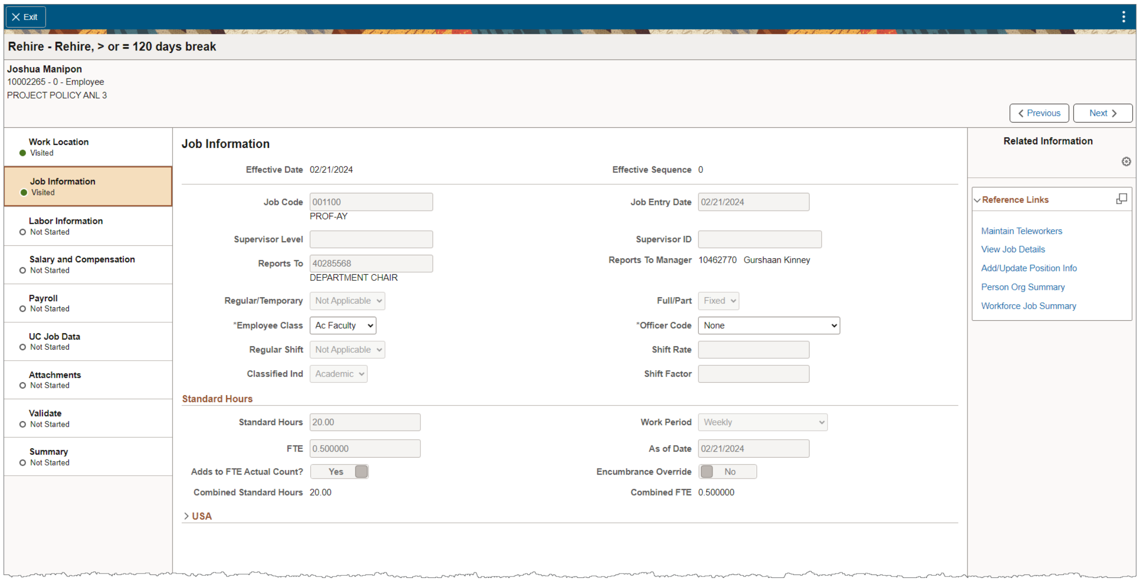
Enter the appropriate **Position Number** or use the Look Up icon to select one from the list of options.



In this example, the **Position Number** we are hiring for is **40281476** for a **PROFESSOR-AY** position. Once all relevant **Work Location** information is entered, click the **Next** button or click on the **Job Information** page activity guide.

Job Information

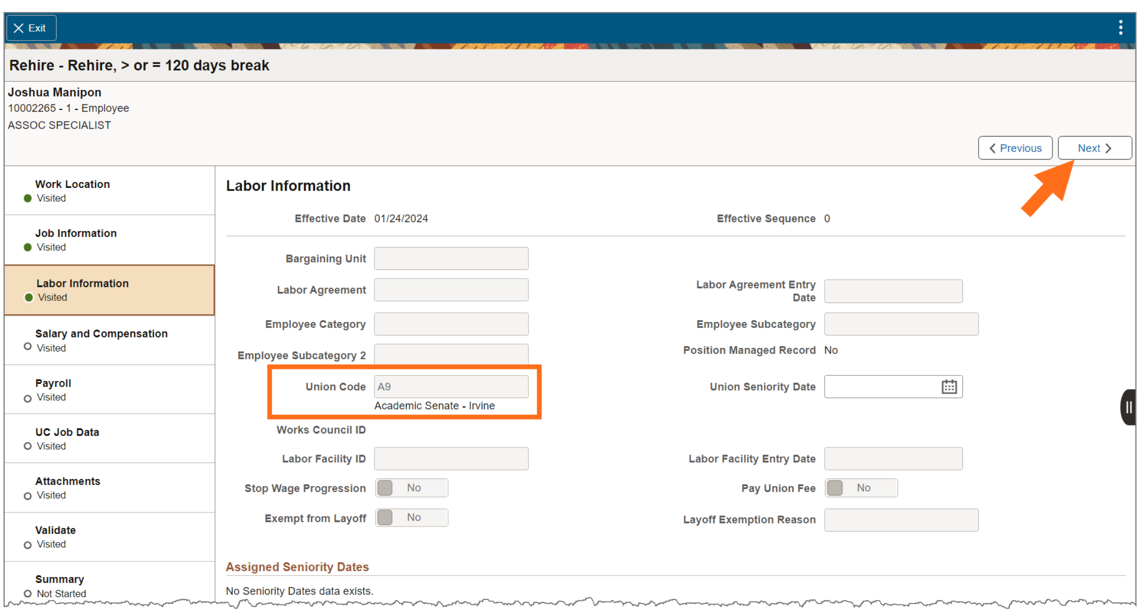
The **Job Information** page most of the fields are grayed out based on the ***Action** and ***Reason** used. Scan the page and make changes as appropriate. Other important information listed on this page includes the **Combined Standard Hours** and the **Combined FTE**.



Click the **Next** button or click on the activity guide to advance to the **Labor Information** page.

Labor Information

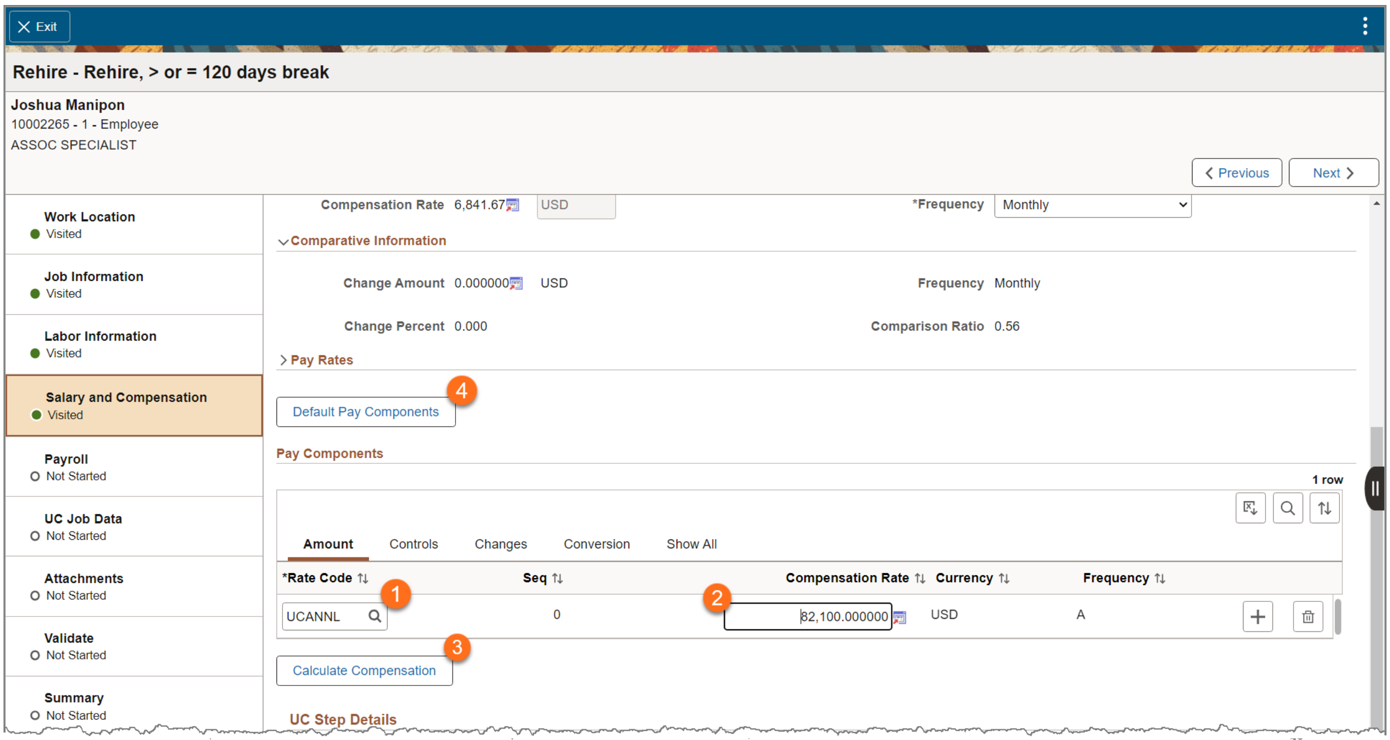
The **Labor information** fields are grayed out for this transaction, except for the Union Seniority Date field. If your locations require this information, use the Calendar icon or type in the date to reflect the seniority date.



Click the **Next** button or click on the activity guide to advance to the **Salary and Compensation** page.

Salary and Compensation

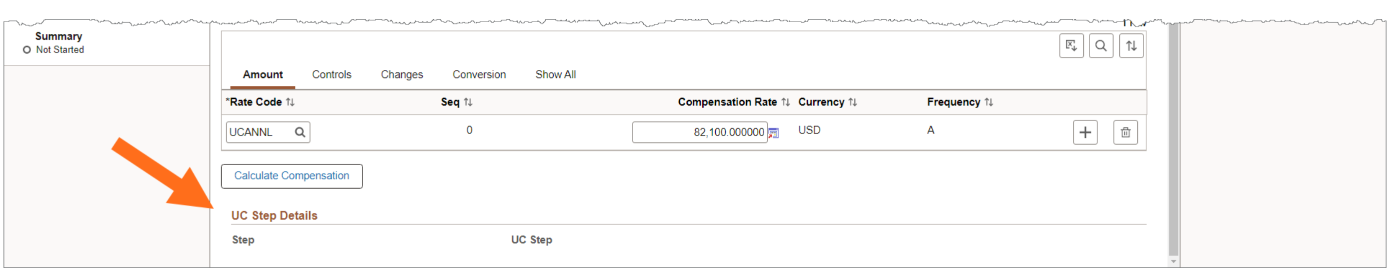
The **Salary and Compensation** fields are enabled for this transaction based on the ***Action** and ***Reason** used.



For example, if the ***Action** and ***Reason** used was for a **REH (Rehire)** and **REH (Rehire,> or = 120 days break)**, and the editable fields include ***Rate Code** and **Compensation Rate**. Enter the appropriate ***Rate Code** or use the Lookup icon to select one from the list. Then, type the dollar amount in the **Compensation Rate** field.

Click the **Calculate Compensation** rate button and the **Default Pay Components** Button.

If the transaction entered requires edits in **UC STEP**, adjust the pay to reflect the correct step and remember to click on the **Default Pay Components** and the **Calculate Compensation** buttons.



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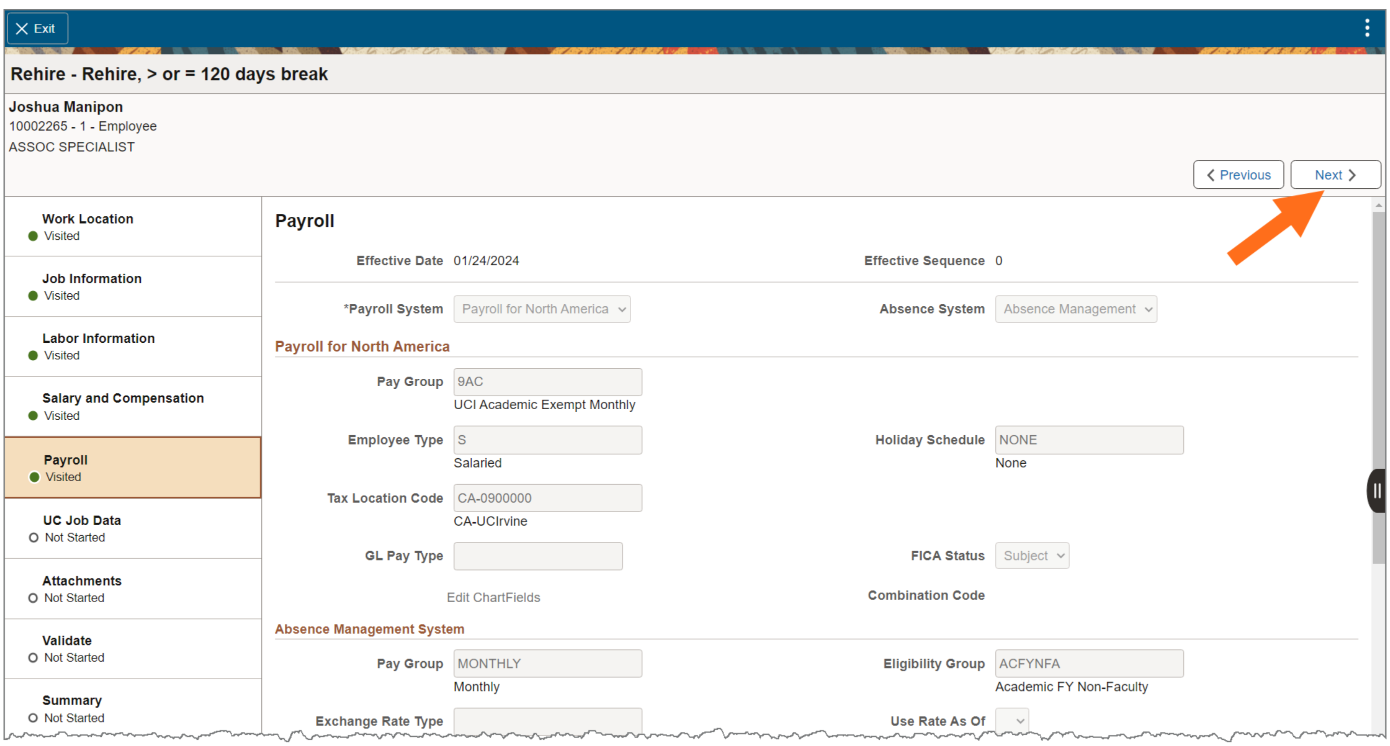
⚠ If you make changes to the **Step** and forget to click on **Default Pay Components** and **Calculate Compensation** buttons, when you get to **Validate**, a hard stop error message will display with guidance to go to the **Salary and Compensation** page to click on **Default Pay Components** and **Calculate Compensation** buttons before submitting the entry.

Click the **Next** button or click on the activity guide to advance to the **Payroll** page.

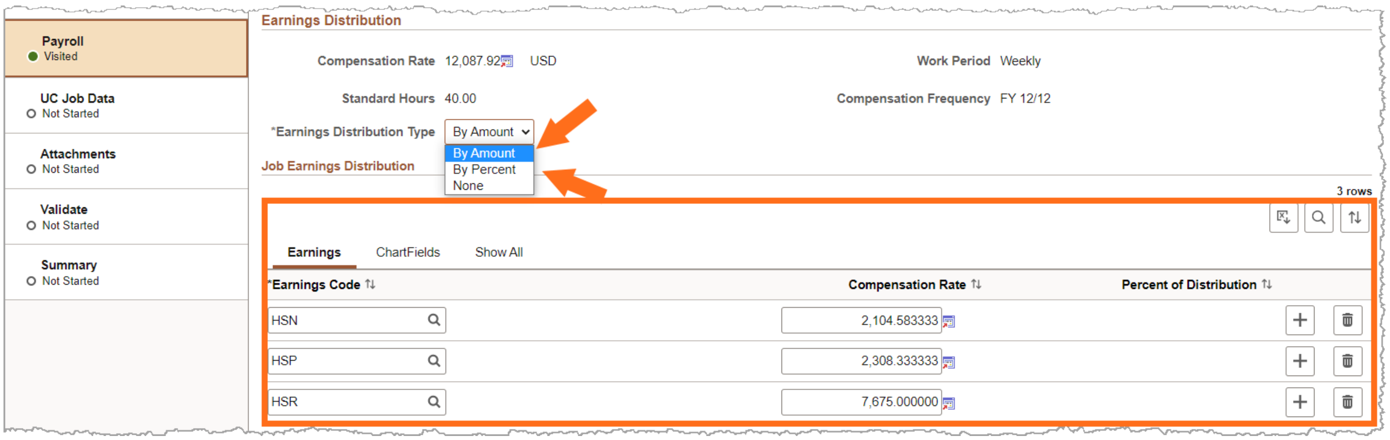
Payroll

The **Payroll** fields are grayed out for this transaction based on the ***Action** and ***Reason** used. For example, if the ***Action** and ***Reason** used was for an **Earning Distribution Change (JED)** and a **Negotiated Comp/Summer Salary (JED)**, the **Earning Distribution** fields would be editable and not grayed out.



Earning Distribution

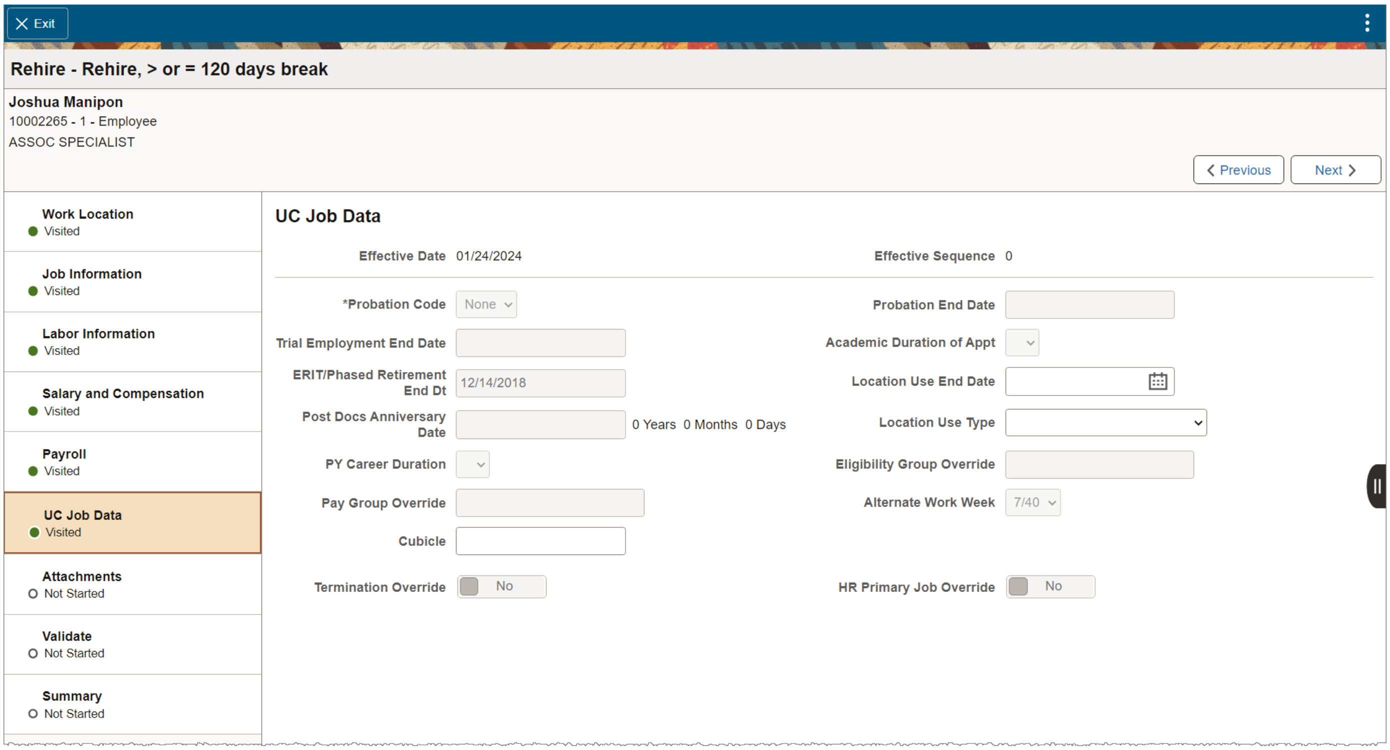
If the ***Action** and ***Reason** position entered requires **Job Earning Distributions** (**JED**), adjust the **Earnings Distribution Type** by selecting either **By Amounts** or **By Percent**, thereby allowing for the entry of **Compensation Rates**. **Earning Distribution** is enables location transactors to edit the **Comp Rate** or remove the distribution if the **FTE** is zeroed out.



⚠ When using Pay Path to process a transaction that modifies an employee's existing **Job Earning Distribution** (JED), UCPath automatically calculates the JED. In **Manage Job**, the transactor must manually input the updated **Compensation Rate** amounts because the **JED** does not calculate automatically. If the transactor fails to complete this step, the transaction will trigger a hard error during validation, preventing submission until it is correctly entered.

UC Job Data

The **UC Job Data** page fields are grayed except for **Location Use End Date**, **Location Use Type**, and **Cubicle**. Make changes as appropriate.



Click the **Next** button or click on the activity guide to advance to the **Attachments** page.

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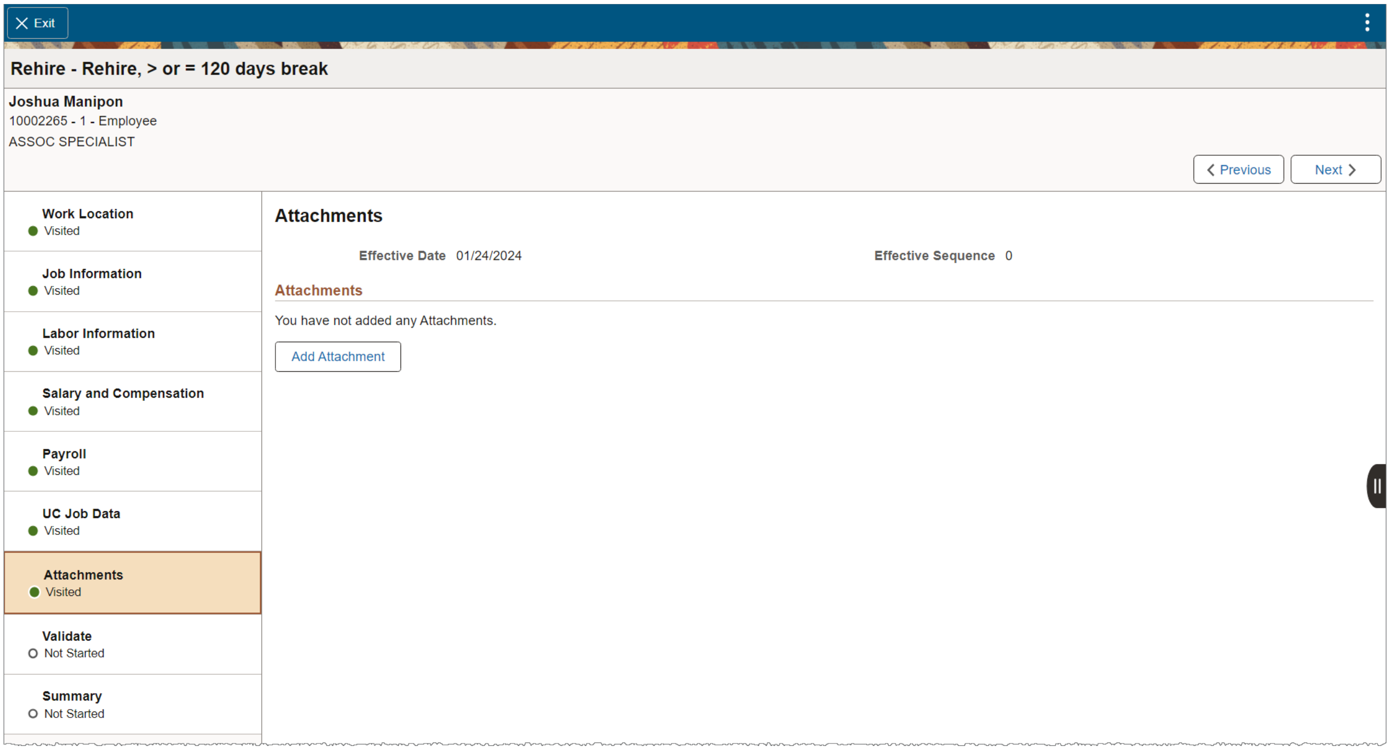
Attachments

On the **Attachments** Page, a transactor can upload attachments. Attachments are viewable by all transactors with access to employee records.



To add an attachment, click the **Add Attachment** button.

In the **File Attachment** window, click **My Device** to select the file to attach.

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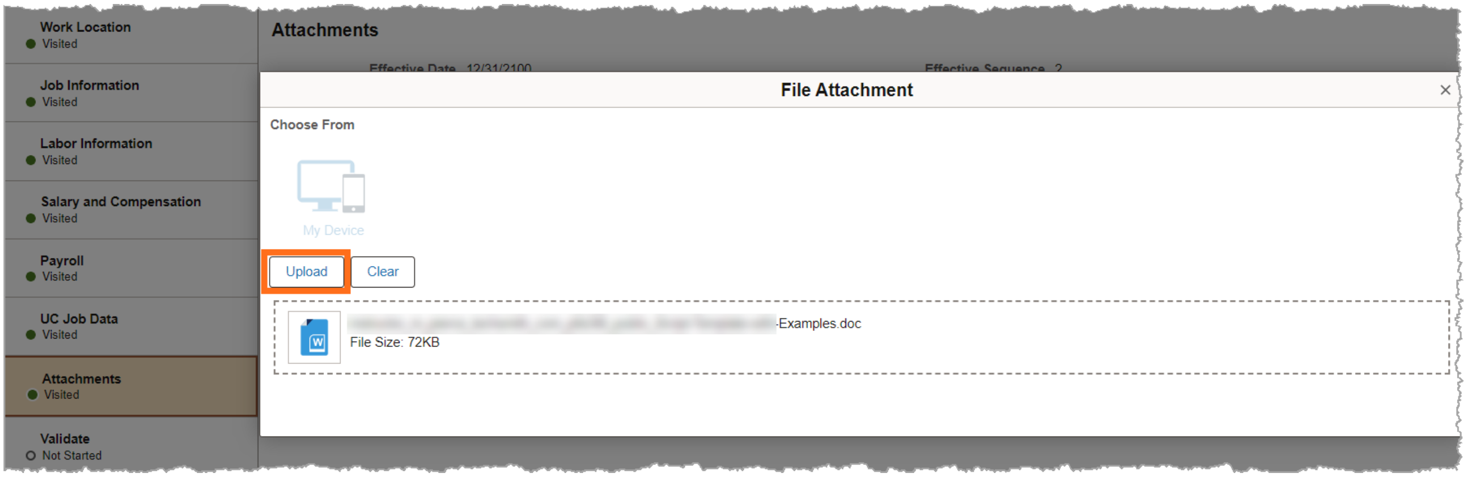
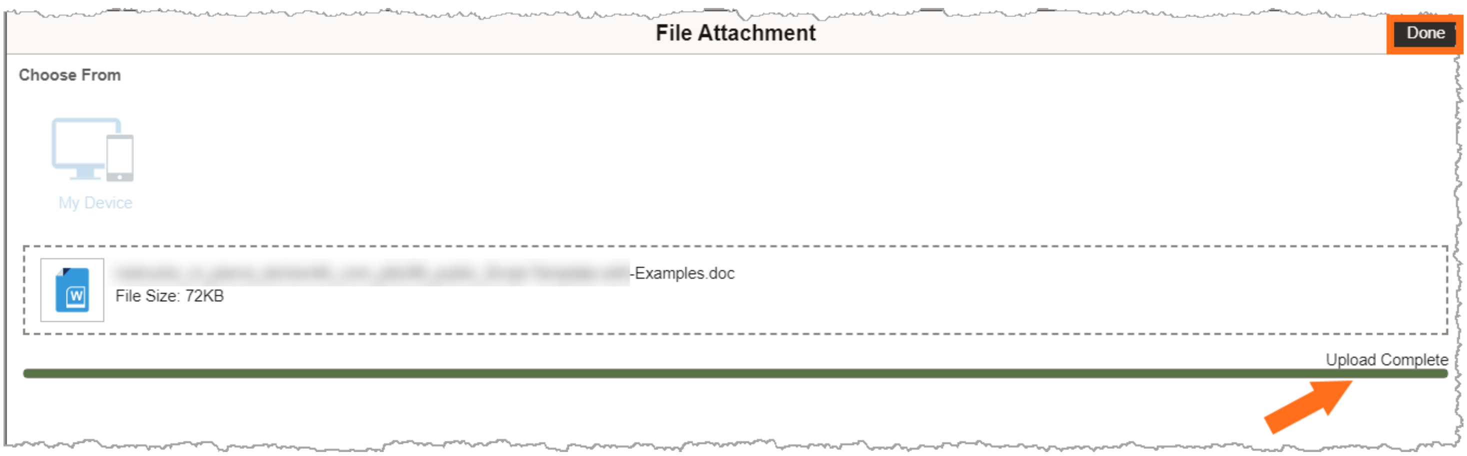
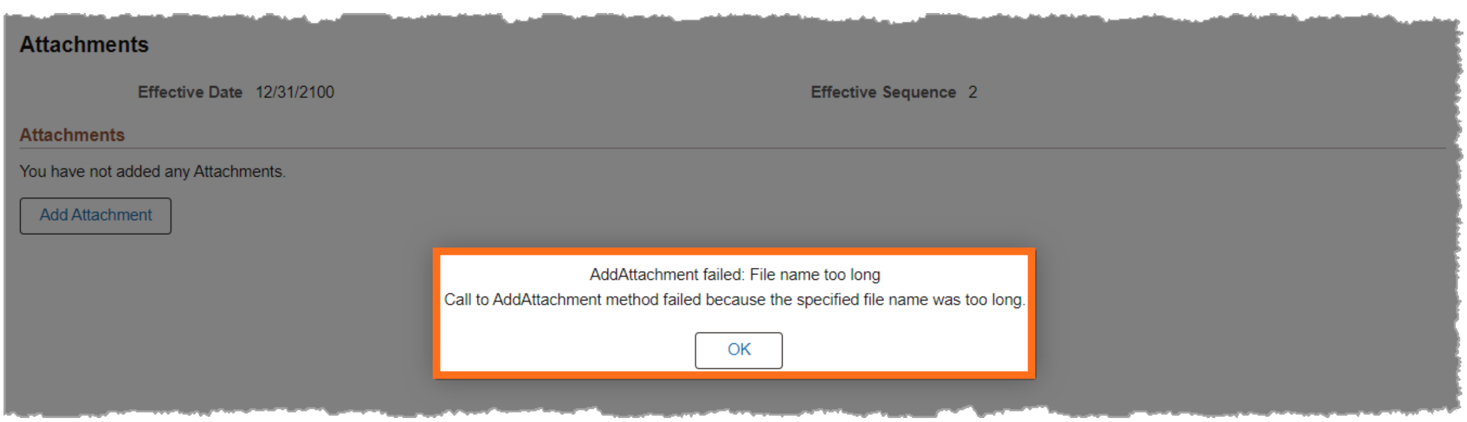
Once a file is selected, click the **Upload** button.



The selected file will upload, and a green bar will display **Upload Complete**. Click **Done.**



Note: If the attached document's file name is too long, an upload error warning will display. This means the file name will need to be shortened and then re-uploaded.



Click the **Next** button or click on the activity guide to advance to the **Validate** page.

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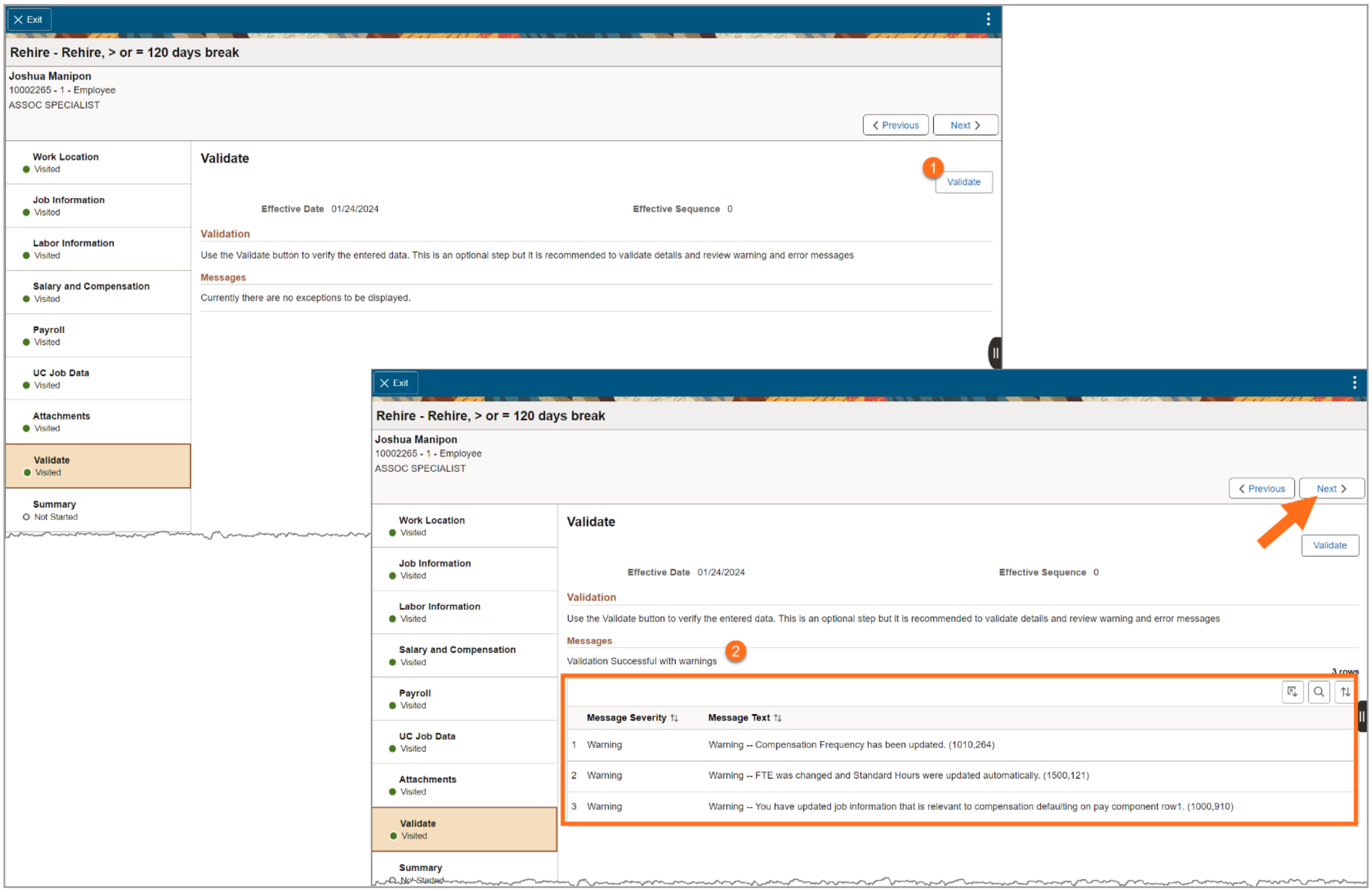
Validate

The **Validate** page displays warnings and errors. The system will prevent the submission of a transaction if there are any errors displayed, so it is important to correct them. Review and correct any warnings as needed, as they may have downstream impacts. It is the responsibility of the transactor to ensure that warning messages are not ignored.



Click the **Next** button or click on the activity guide to advance to the **Summary** page.

Summary Page

The **Summary of Changes** is organized in a table format and displays a **Field Label**, **Proposed Information,** and **Current Information**. The **Field Label** column displays the field name impacted by the transaction. For example, when a **Rehire** is conducted, the **HR Status, Field label** is displayed with a circular orange circle indicating that a change impacting that field was made. **Proposed Information** column displays the new change. For example, the **HR Status** for a **Rehire** will display Active. The **Current Information** column reflects the original state in **Job Data** before the transaction. The **Proposed Information** column displays the modified state that the **Job Data** will assume after the transaction is approved.

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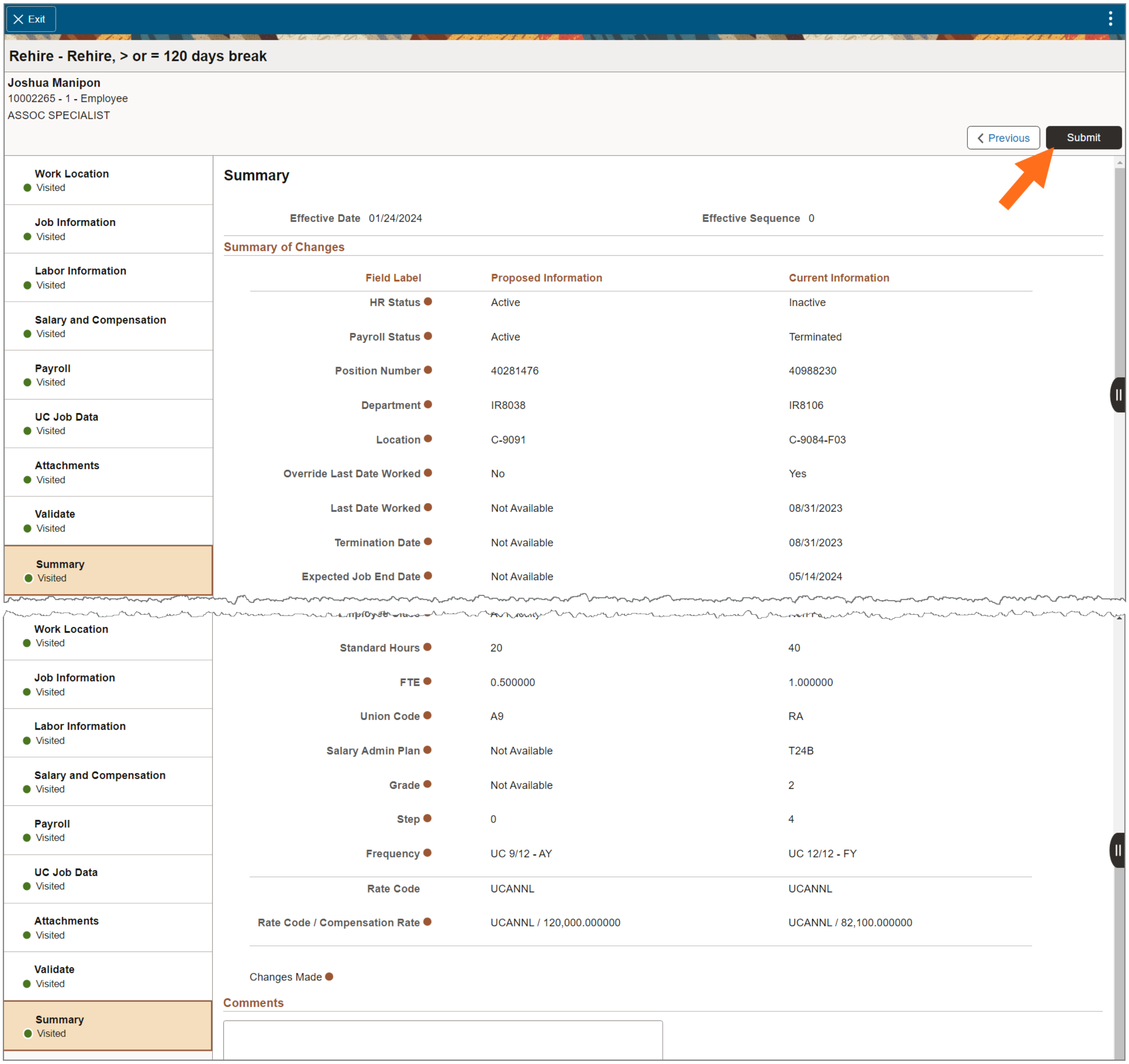

⚠ It is important to note that at this stage, any changes made have not been submitted to UCPath. Transactors should review this page to make sure that the information displayed in **Proposed Information** reflects the intended change.

Once the transactor confirms the change displayed in **Proposed Information**, click **Submit**.

Note: A comment window will display for additional comments to be entered before submitting the transaction.

Enter the **Submission Comments** and click **Submit** to commit the change in UCPath.

Submit Confirmation

The **Submit Confirmation** page will display. To review the newly entered transaction/row, click **Job Actions Summary** or to navigate to the search page, click on **Go To Search Results.**

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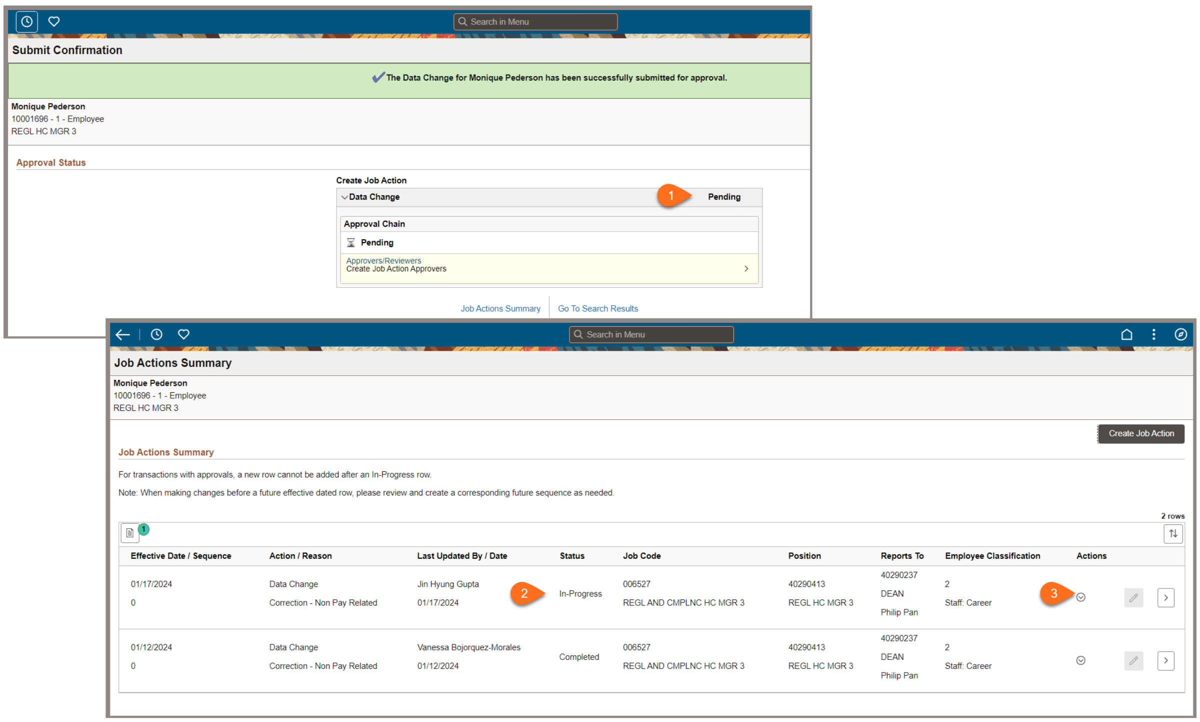
Approval Workflow

The Approval Workflow process in UCPath requires new roles for requesters and approvers. The specific roles will be provisioned on a Location basis and depend on the levels of approvals.

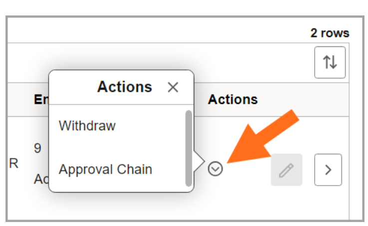
Submitted transactions using **Manage Job** will be routed for approval/s and display a **Pending** status for **Data Change**.

In addition, at the top of the **Job Action Summary** page, the newly submitted transaction will display a status of **in-Progress**. This means that the transaction has been sent for review.

Navigation: Workforce Administration (Homepage) > Approvals (Tile) > **Fluid Approvals (link)**



Once a transaction is reviewed, the status in the **Job Action Summary** page will either display **in-Progress**, **Denied**, **Rework**, or **Completed,** depending on the action the **Approver** took. Note the status displayed may vary depending on what a Location has opted into. Some Locations have opted to not include the local approval workflow. But some action / reason code combinations will still require processing from the UCPath.



The **Actions** button displays available options, including the option to **Withdraw** the submitted transaction and a link to review the **Approval Chain**.

Withdrawing Submitted Transaction

You can withdraw a submitted transaction while it's pending final approval with UCPath. Withdrawn transactions cannot be edited by location users and must be deleted before submitting a new transaction with the same or later effective date.

Deleted transactions are not visible from **Manage Job** and **Job Actions Summary** pages.

Transaction History

Submitted transactions (including pending, approved, denied, and withdrawn) remain available for review in the **Pending Approvals Page**.

Navigation: Workforce Administration (Homepage) > Approvals (Tile) > Fluid Approvals (link) > **Pending Approval**

- Pending Approval
- Review Approvals
- Approvals History

Statuses

Review the table for the different **Job Actions Summary** page statuses based on actions taken by the **Approver**.

	Requester Action	Job Action Summary Page Transaction Status	Approver Action	Job Action Summary Page Transaction Status	Completed Status
	1	2	3	4	5
APPROVED	**Submit** A transaction has been initiated for review and approval.	**in-Progress** The submitted transaction has a pending action and is in the staging tables.	**Approve** The approver has reviewed and approved the transaction.	**Completed** The data transaction processed and is available in **Job Data**.	**Completed** The transaction is viewable in **Job Data**.

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	Requester Action	Job Action Summary Page Transaction Status	Approver Action	Job Action Summary Page Transaction Status	Completed Status
PUSHED BACK	**Submit** A transaction has been initiated for review and approval.	**in-Progress** The submitted transaction has a pending action and is in the staging tables.	**Pushback** The approver has reviewed the submitted transaction and pushed back for additional **Rework.**	**Rework** The transaction has a pending action and needs to be reviewed, **Reworked,** and resubmitted for approval. *The edit function in* **Job Actions Summary** *is enabled.*	**Completed** The **Job Action Summary** will display a **Completed** status if the transaction is approved after the **Rework**. **Denied** The **Job Action Summary** will display a **Denied** status if the transaction is denied after the **Rework**.
DENIED	**Submit** A transaction has been initiated for review and approval.	**In-Progress** The submitted transaction has a pending action and is in the staging tables.	**Deny** The approver has reviewed and denied the transaction.	**Denied** The transaction was reviewed and denied. *The edit function in* **Job Actions Summary** *is disabled.*	**Denied** The **Job Action Summary** will display a status of **Denied** if the transaction is denied.

Actions	Transaction Status	Approval Status	Requester	
			Email Notification	Related Action
Submit	In Progress	In Progress	✓	Withdraw
Approve	Completed	Approved	✓	No Action
Deny	Denied	Denied	✓	Delete
Pushback	Rework	Terminated	✓	Withdraw or resubmit
Withdraw	Withdrawn	Canceled	None	Delete

Actions	Transaction Status	Approval Status	Approver	
			Email Notification	Related Action
Submit	In Progress	In Progress	✓	Approve, Pushback, or Deny
Approve	Completed	Approved	None	No Action
Deny	Denied	Denied	None	No Action
Pushback	Rework	Terminated	None	No Action
Withdraw	Withdrawn	Canceled	✓	No Action

Actions	Transaction Status	Approval Status	Reviewer	
			Email Notification	Related Action
Submit	In Progress	In Progress	✓	View Only
Approve	Completed	Approved	None	No Action
Deny	Denied	Denied	None	No Action
Pushback	Rework	Terminated	None	No Action
Withdraw	Withdrawn	Canceled	None	No Action

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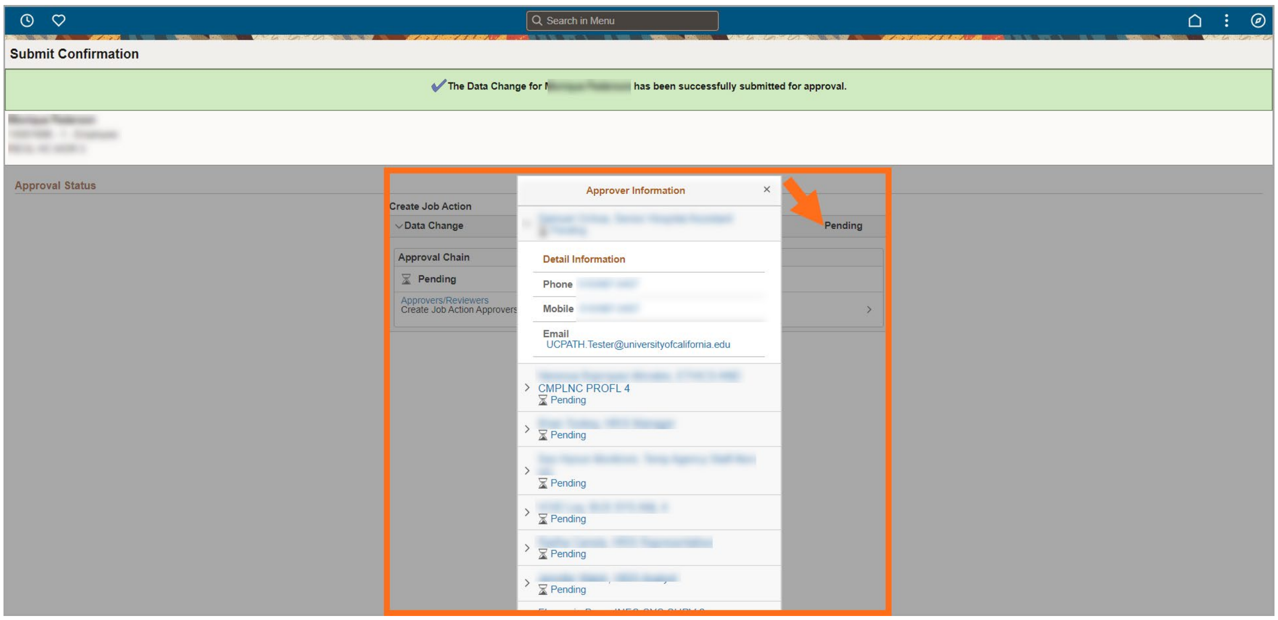
Actions	Transaction Status	Approval Status	Alternate Requester	
			Email Notification	Related Action
Submit	In Progress	In Progress	None	No action possible
Approve	Completed	Approved	None	No action possible
Deny	Denied	Denied	None	No action possible
Pushback	Rework	Terminated	None	Withdraw or resubmit
Withdraw	Withdrawn	Canceled	None	No action possible

Actions	Transaction Status	Approval Status	AWE Administrator	
			Email Notification	Related Action
Submit	In Progress	In Progress	None	Deny or reassign
Approve	Completed	Approved	None	No Action
Deny	Denied	Denied	None	No Action
Pushback	Rework	Terminated	None	No Action
Withdraw	Withdrawn	Canceled	None	No Action

In the **Submit Confirmation** page, a confirmation message appears at the top of the page. Additionally, a dialogue box also displays the status of the data change.

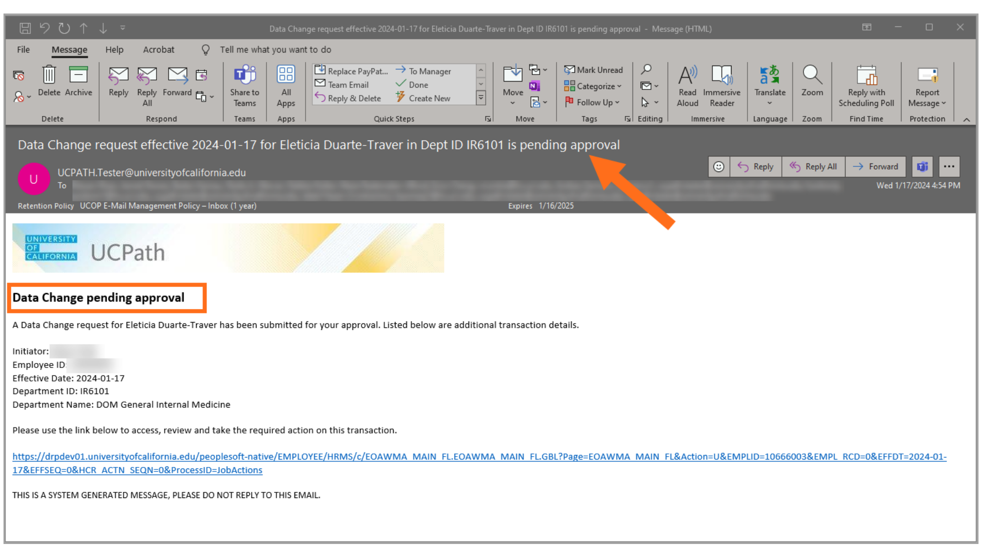
To review detailed information on the approver/s, including phone number, mobile number, and email, click on each listed approver.



Notification Emails

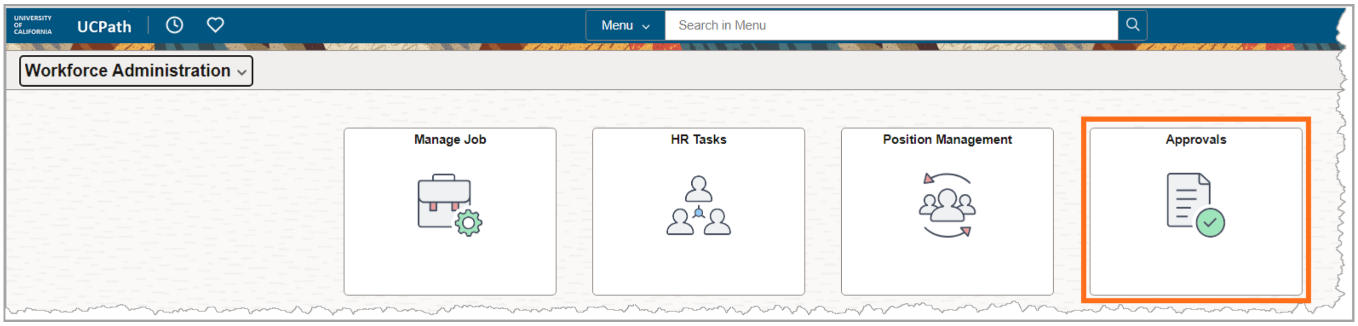
Notification emails are routed to the list of **Approver/s** and the **Requester**, notifying them of a pending action.

In this example, the notification email was sent to the **Approver** stating that a request had been submitted and is pending their review and approval.

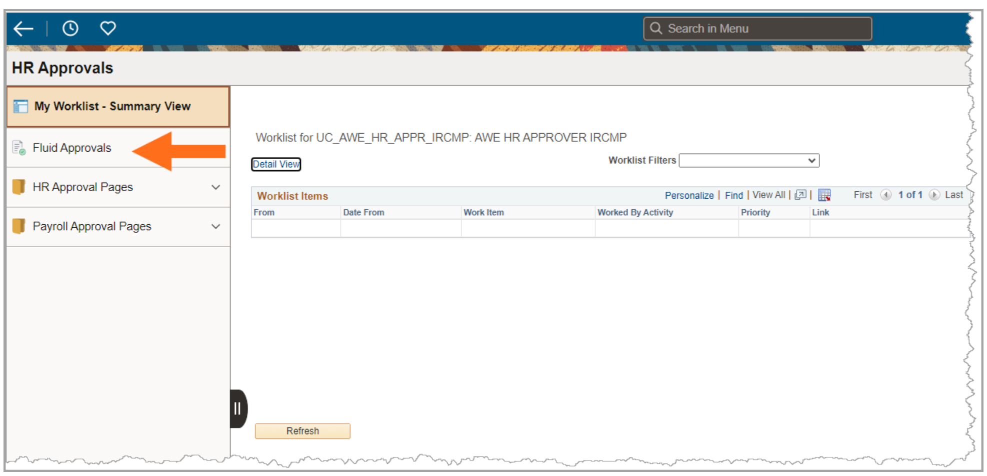


Approver Screens

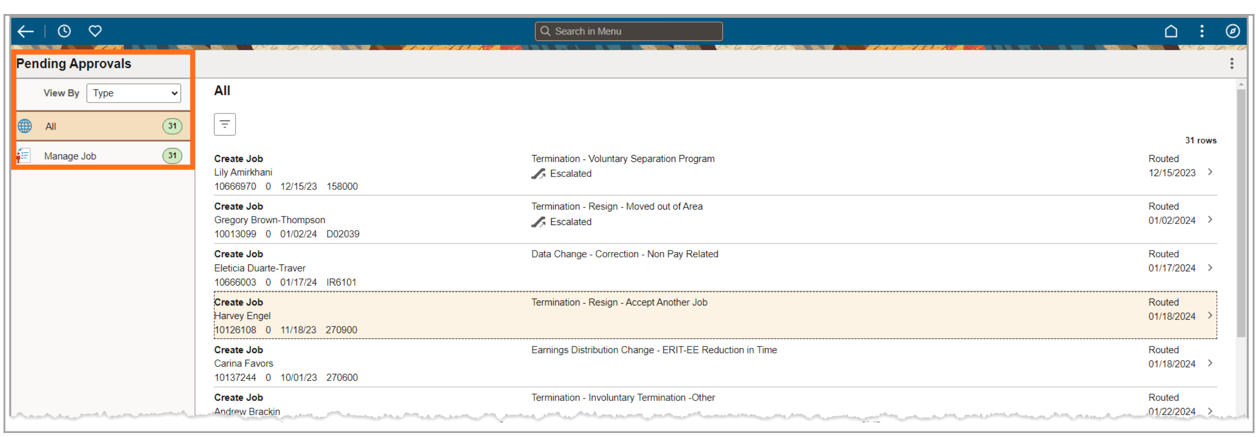
Approvers at the Location can review submitted transactions by navigating to the **Approvals**. Click the **Approvals** tile to access the **HR Approvals** page.



From the **HR Approvals** page, pending transactions display in the **My Worklist – Summary View** section, or you can click on **Fluid Approvals**.



Click **Fluid Approvals** to display the **Pending Approvals** transactions.

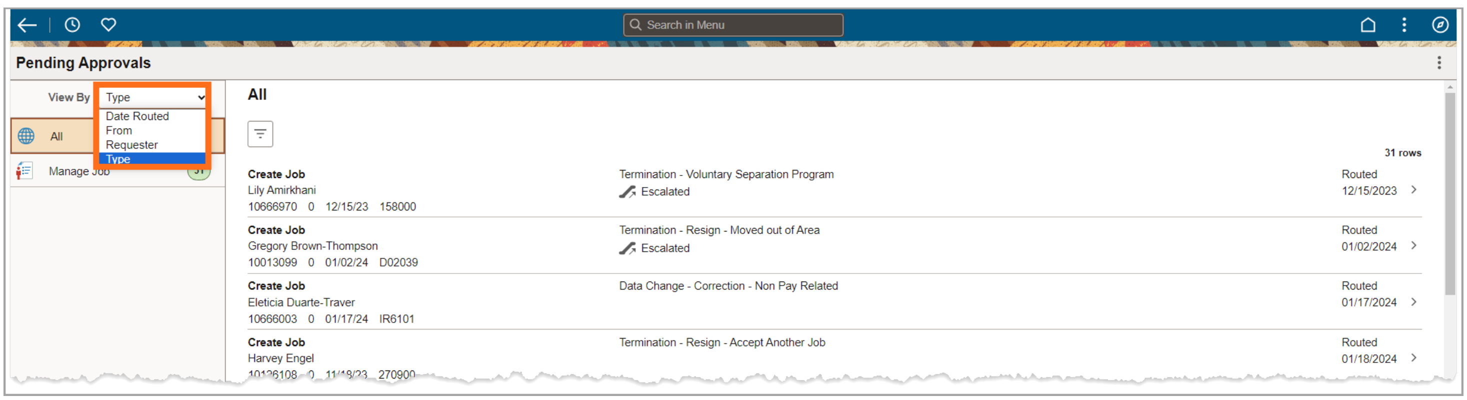


In this example, there are several transactions pending approval. Depending on the number of transactions available, an approver can filter the transactions by clicking on the **View By** dropdown or All fluid filter icon.

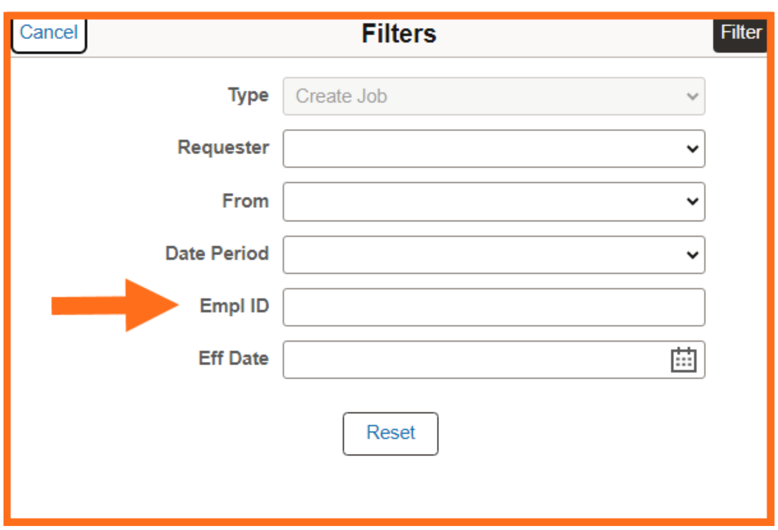
⚠ The **Manage Job** transactions displayed include **Extended Absence** and **Manage Job** transactions and do not have transaction IDs.

Filter Options

The **View By** dropdown options include by **Type**, **Date Routed**, **From**, or by **Requester**.



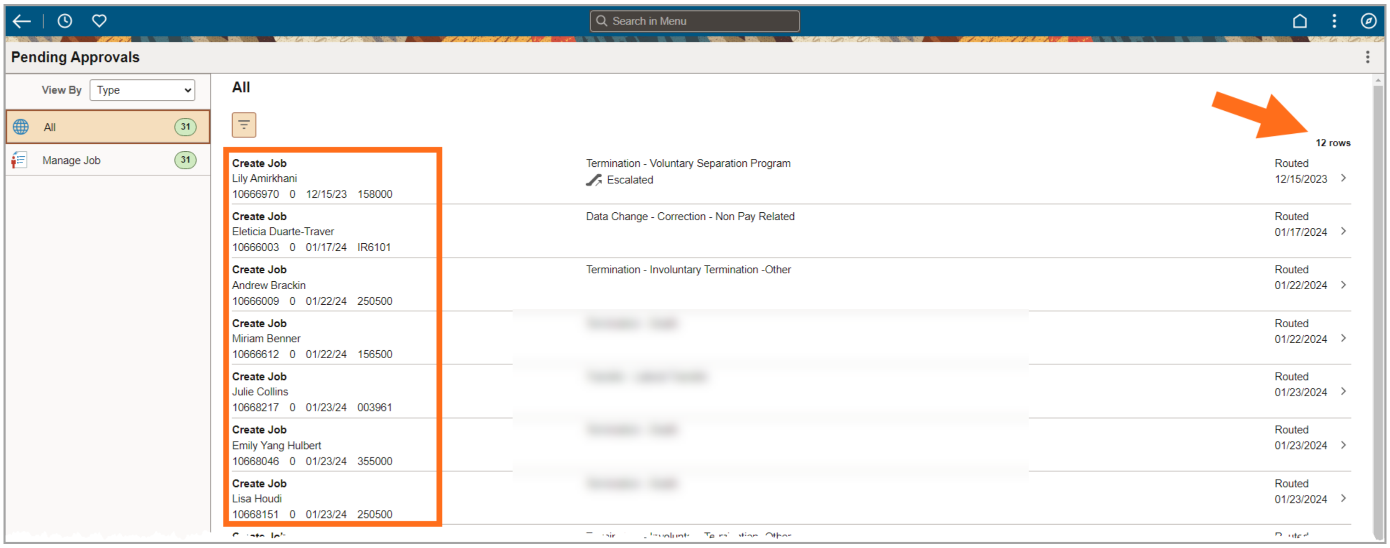
Click the fluid **ALL** filter icon to display the **Filters** dialogue window.



Fluid **Filters** include **Requester**, **From**, **Date Period**, **Empl ID** (including partial employee IDs) and **Eff Date**. To clear out the search filter, click **Reset**.

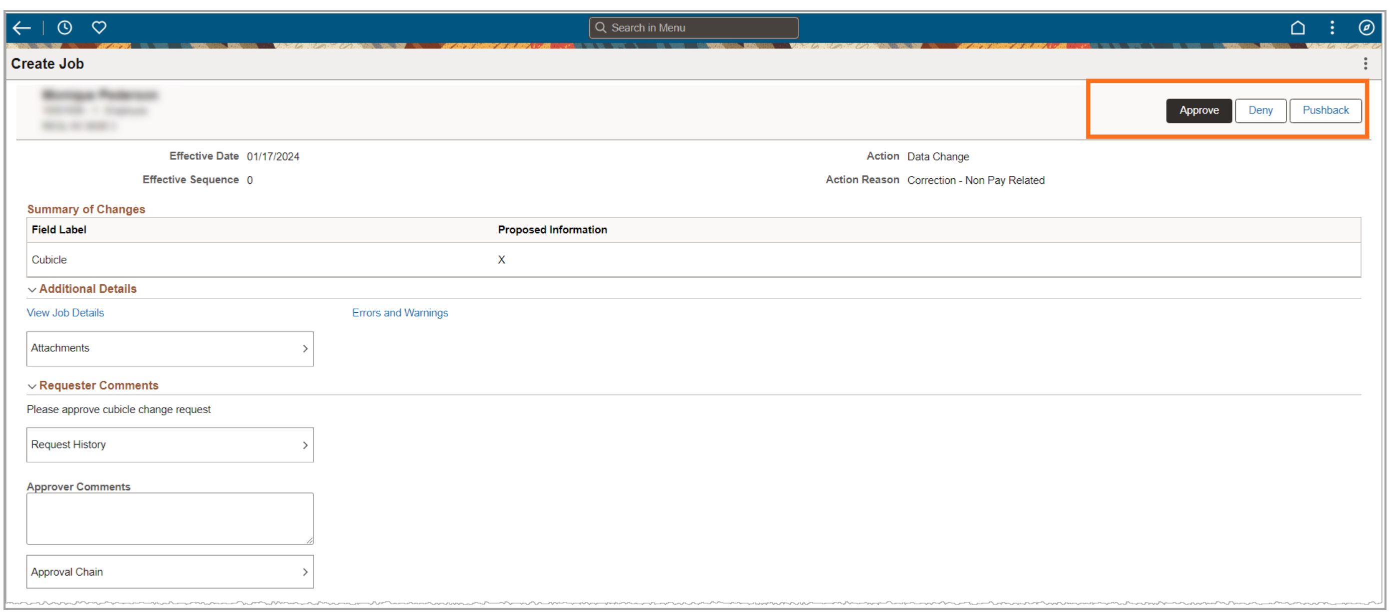
Job Aid: Manage Job Phase II

Next, click on the transaction to review the options to **Approve**, **Deny,** or **Pushback**.



Approvers should avoid editing pushed-back transactions. Making edits to pushed-back transactions will cause them to lose their role as approvers for those transactions.

This opens the **Create Job** page with options to **Approve**, **Deny**, or **Pushback** the transaction. Depending on the action the approver takes, the **Job Data Summary** page will reflect the updated status based on whether the transaction was **Approved**, **Denied**, or **Pushed Back** for rework.



Denied transactions are in a final state. The status of the transaction is reflected in the **Job Data Summary**.

To return to the home page, click on the **Home** icon on the navigation bar. This will direct the transactor back to the UCPath PeopleSoft **Homepage**.